GETTING STARTED WITH MICROSOFT COPILOT CHAT - Outlook

Your AI Assistant Across Microsoft 365

MARIST UNIVERSITY
Digital Education

Background graphic generated by Copilot

AGENDA

WHAT IS MICROSOFT COPILOT CHAT?

- What Copilot is
- Privacy and Marist guidance
- Prompting fundamentals
- A few live demonstrations

HOW DO I USE IT?

- Accessing Copilot Chat
- Using the tool

Building a Prompt

- Using Copilot at Marist

AGENDA

LEARNING GOALS

- Collaborate effectively with AI tools by applying human judgment, context, and accountability to AI-supported tasks and decisions.
- Experiment with AI tools by trying, refining, and iterating on use cases without expecting perfect results.
- Learn from AI outputs that miss the mark by reflecting on what worked, what didn’t, and how to adjust.

Marist 100 /AI Strategy

Marist University's Framework for AI Leadership

This is "Marist + AI": our enduring strengths amplified, not replaced. Our mission elevated, not abandoned. The power of "and" not "or" at work to meet this moment"

MARIST + AI

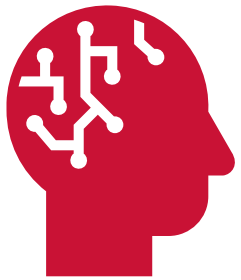
https://www.marist.edu/marist100/ai-strategy

https://www.marist.edu/documents/d/guest/ai-operations-guidelines-final

WHAT IS MICROSOFT COPILOT CHAT?

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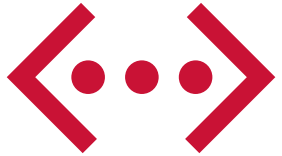
WHAT IS IT?



AI powered assistant with collaboration and file uploading tools



Helps write, analyze, summarize, visualize, and automate tasks



Powered by OpenAI's GPT-5 models

WHAT DOES IT HAVE?

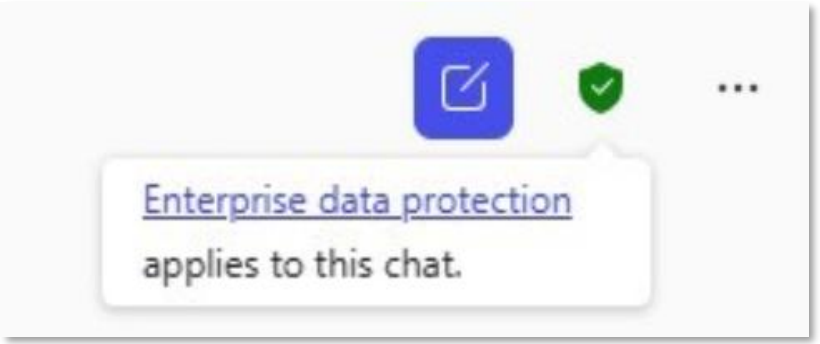
KEY TRAITS

- Natural language prompts
- Aware of context (uploaded files, conversation)
- Automation and file creation
- Collaboration and sharing AI workflows
    - Share AI generated materials
    - Share AI workflows (prompts, templates)

EXAMPLE USE CASES

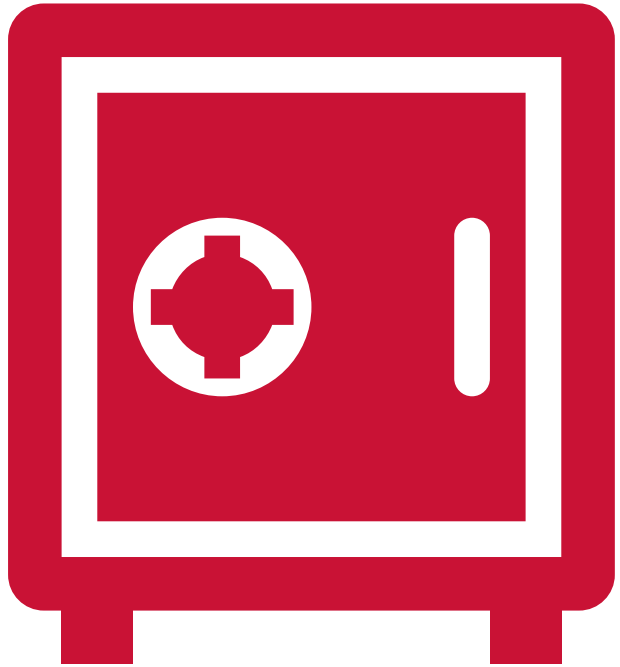
- Draft ideas in Word
- Create draft slides for PowerPoint
- Summarize, process, and analyze documents

PRIVACY & SECURITY



Once you sign in with your Marist account:

- Your data stays within Microsoft 365
- Copilot won't train off your data or information
- You control what Copilot can access – you upload the data
- Copilot will not act (send emails, etc.) on your behalf
- You can look for the green security shield in the top right of Copilot chat – **enterprise data protection** keeps your information secure
- Copilot usage is optional



Files uploaded to Copilot chat are saved in OneDrive for later access (private folder "Files from Copilot Chat" in root directory)

THREE CORE FEATURES



ASK

- Give Copilot context and ask it to process it
- Summaries, analysis



CREATE

- Prompt Copilot to generate images
- Prompt Copilot to make new files: Word, PowerPoint ...



SHARE

- Share prompts with others or save them for later



HOW DO I USE IT?

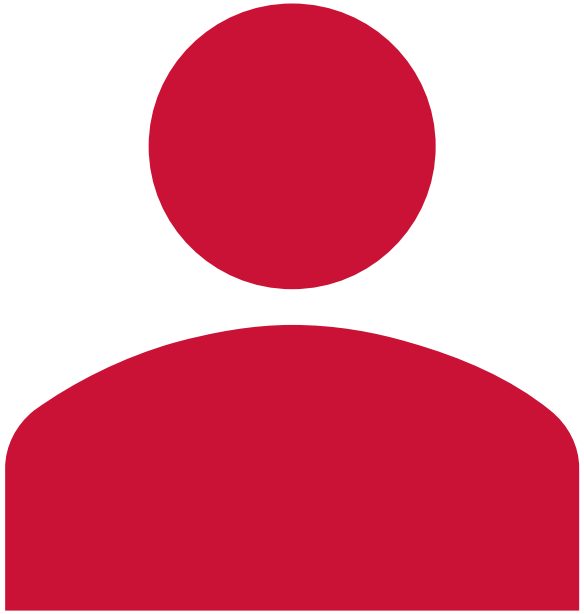
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SIGNING IN

To access all of Copilot, **sign into your Microsoft account through Marist.**

BENEFITS TO SIGNING IN

- Better security (enterprise)
- No usage limits
- Link OneDrive files directly
- Share prompts
- Access prompts shared by other Marist users



The Copilot experience varies greatly based on if you're using your personal or Marist account – double check which one you're using!

OPENING COPILOT

Access to Copilot is all done **on the web** and inside of a web browser.

INSIDE MICROSOFT 365

- Outlook – Icon upper right

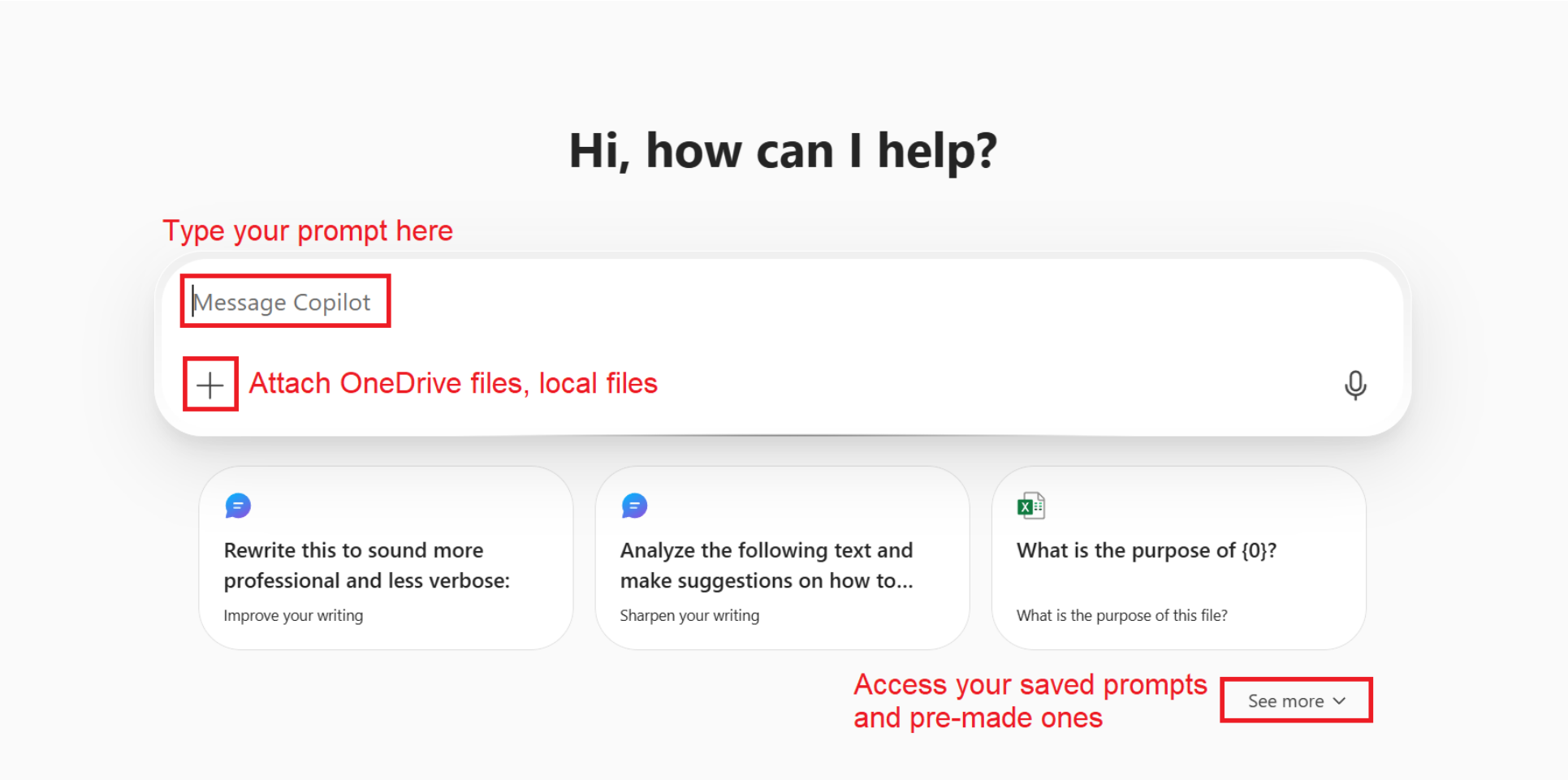


DIRECT LINK

- Navigate to m365.cloud.microsoft

- Download the app:

NAVIGATING COPILOT



FORMING A PROMPT

Background graphic generated by Copilot

Better Prompt Builder



Role: Who are you?

Task: What do you need help with?

Audience: Who will use or read the result?

Context: Why are you doing this?

Output: What format do you want?

Constraints: Length, tone, style, deadlines, etc.

Prompt Builder

Build a Better Prompt

Use this template whenever you're unsure how to start:

- I am a **[role]**.
- I need help **[task]**.
- The audience is **[audience]**.
- The purpose is **[goal]**.
- Present the results as **[format]**.
- Use a **[tone]** tone and keep it under **[length]**.

Example

- I am a faculty member teaching a first-year seminar.
- Create five discussion questions about AI ethics.
- The audience is first-year undergraduate students.
- The goal is to encourage critical thinking and discussion.
- Present the results in a table with suggested discussion times.
- Use accessible language and avoid yes/no questions.

Prompt Builder

Need: Turn rough notes into an email

Prompt:
I am a university staff member. Turn the notes below into a clear email to faculty and staff. Use a friendly, professional tone. Keep it under 150 words, include a descriptive subject line, and make any action the reader needs to take very clear.

Notes: [paste notes]

Need: Make a difficult email sound friendlier

Prompt:
Review the email below and rewrite it so it sounds helpful and collaborative rather than critical. Keep the meaning and important details unchanged.

Email: [paste draft]

Prompt Builder

Weak:

Write an email about a workshop.

Better

Write an email inviting faculty to an accessibility workshop.

Much better

I work in Digital Education at a university. Draft an email inviting faculty to an upcoming workshop about creating accessible course materials. Explain why the session will be useful and encourage faculty to register. Include a subject line and a clear call to action. Use a warm, supportive tone and keep the message under 175 words.

Prompts to Try

Staff Prompts

I am a **staff member** in Information Technology.
I need help **drafting an email** about a planned system maintenance outage.
The **audience i**s all faculty, staff, and students.
The purpose is to inform campus users that Banner will be unavailable on Friday from 6:00 PM to 10:00 PM, explain why the maintenance is necessary, and **provide Help Desk contact** information.
Present the results as a professional email with a subject line and clear call to action.
Use a friendly and professional tone and keep it under 250 words.

Faculty Prompts

I am a **faculty member** teaching an undergraduate course.
I need help responding to a long email thread from students.
The **audience** is students enrolled in my course.
The purpose is to **summarize the discussion**, answer outstanding questions about assignment deadlines and grading, and remind students of my office hours.
Present the results as a **concise email reply** and include a **brief summary** of the unresolved questions.
Use a supportive and encouraging tone and keep it under 300 words.

Prompts to Try

Staff: Event Communication

I am a staff member in Student Affairs.
I need help drafting a reminder email for an upcoming student leadership workshop.
The audience is student organization leaders and club officers.
The purpose is to encourage attendance, highlight the benefits of participating, and provide event details including date, time, location, and registration information.
Present the results as an email with a subject line and a short list of key event details.
Use a welcoming and enthusiastic tone and keep it under 200 words.

Faculty: Academic Progress Outreach

I am a faculty member teaching a first-year course.
I need help writing an email to students who have missed multiple assignments.
The audience is students who may be struggling academically.
The purpose is to express concern, encourage them to seek support, remind them of available resources, and invite them to meet with me.
Present the results as a personalized email template that can be reused for multiple students.
Use a supportive and empathetic tone and keep it under 250 words.

Other Prompts to Try

Staff Prompts

Summarize for Leadership

Summarize this document for a Vice President who has less than two minutes to read it. Focus on key findings, risks, opportunities, and recommended actions.

Great for: reports, proposals, meeting notes, strategic plans

Faculty Prompts

Improve Assignment Instructions

Rewrite these assignment instructions for first-year undergraduate students. Clarify expectations, remove unnecessary jargon, and highlight deliverables and grading criteria.

Great for: assignments, projects, labs, case studies

Other Prompts to Try

Staff Prompts

Create Action Items

Review these notes and create an action plan with tasks, suggested owners, deadlines, and next steps. Present the results in a table.

Great for: meetings, committee work, project planning

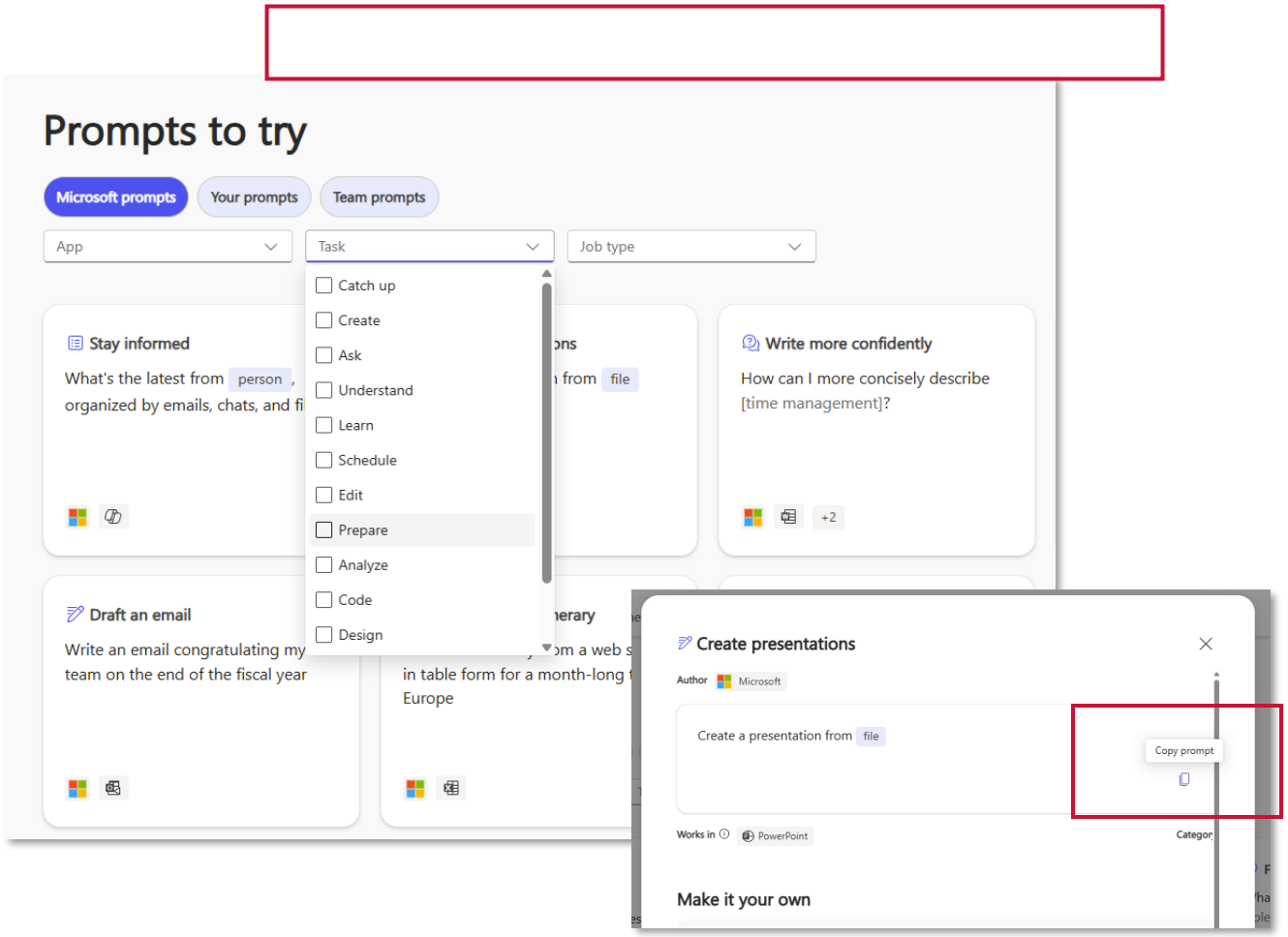
Faculty Prompts

Create Discussion Questions

Create five discussion questions that encourage critical thinking, reflection, and application of course concepts. Avoid questions that can be answered with simple facts.

Great for: class discussions, online forums, seminars

Hands on Activity



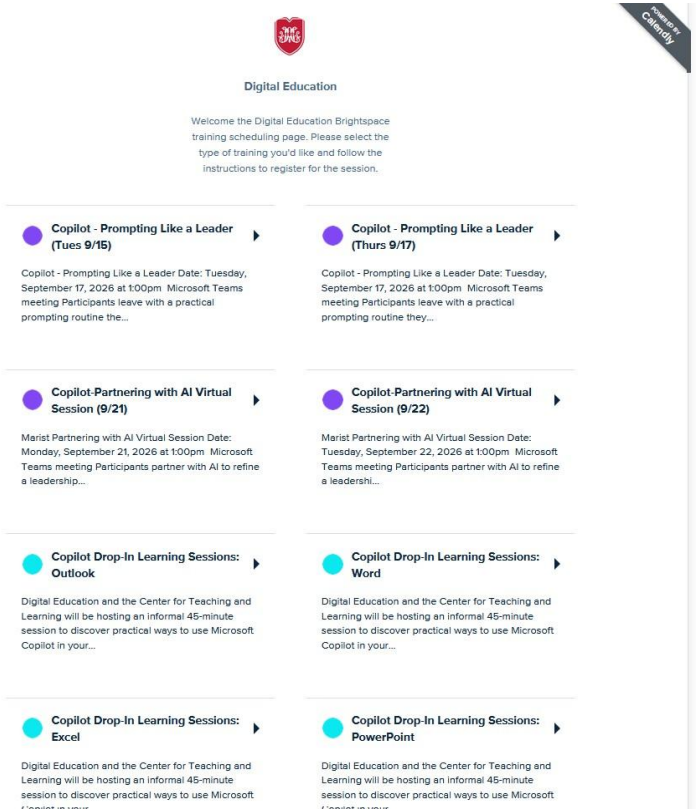
- Open Microsoft Copilot https://m365.cloud.microsoft/
- Open Microsoft Copilot Prompt Gallery: https://adoption.microsoft.com/en-us/copilot/prompt-gallery/
  - Narrow the selection
- Select and copy a prompt from the prompt gallery.
- Paste the prompt in your Copilot!

MARIST UNIVERSITY
Digital Education

THANK YOU!

LEARN MORE ABOUT COPILOT

- Upcoming Sessions:
  - https://calendly.com/marist-digital-education



- From Digital Education: https://my.de.marist.edu/copilot
  - Links to tutorials
  - Links to tools and explanations
  - Further reading

- From Microsoft: https://learn.microsoft.com/en-us/copilot/microsoft-copilot
  - Article-style readings about Copilot chat

QUESTIONS?