MICROSOFT 365



Microsoft 365 Copilot Workshop

Two-day participant guide

Research, draft, refine, present and automate one connected project with Copilot across Chat, Pages, Word, Outlook, PowerPoint, Forms, Excel, Teams and Copilot Studio.

Delivered by Asraf · Microsoft Certified Trainer

Microsoft 365 Copilot Workshop

Two-day participant guide · Participant edition, version 1.0

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Online resources: github.com/Asraf-JS/M365-Copilot-Workshop

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Screenshots show the product at the time of writing. Microsoft updates its apps often, so labels and layouts in your tenant may differ slightly.

About the author

Asraf is a Microsoft Certified Trainer and HRD Corp-certified IT trainer based in Malaysia. He has been teaching working professionals since 2008, helping teams at banks, pharmaceutical companies, construction firms, and retailers get real work done with Microsoft 365, Power Platform, Excel, Google Workspace, and, more recently, AI tools like Copilot.

He holds a Bachelor of Information Technology (Multimedia) from the University of Malaya, along with Microsoft certifications in Power BI (PL-300) and AI for business (AB-730). Outside the classroom he writes his own automation tools in Python and Node.js, mostly to save himself from doing the same task twice.

He runs his training practice solo, which means he has personally felt every inefficiency this book tries to fix.

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INTRODUCTION

Before you begin

How to use this book

This book collects everything from the two-day Microsoft 365 Copilot workshop in one place, so you can follow along offline and keep it at your desk afterwards.

Each chapter matches one topic of the workshop and has two parts:

- **Notes** explain the concepts and walk you through each feature step by step, with screenshots.
- **Hands-on exercises** give you copy-ready prompts, with where to run them, which grounding to use and which model to pick.

Look out for the coloured boxes. Blue boxes are notes and license differences, teal boxes are tips and good habits, purple boxes are things to try, and orange boxes are key points.

Prefer to copy prompts rather than retype them? Every prompt in this book is also online at **github.com/Asraf-JS/M365-Copilot-Workshop**, where each code block has a copy button.

Workshop scenario

Throughout this workshop you work on one connected project from start to finish.

> **You are creating an AI Usage Guide for your department.** This guide will explain how your team should use AI tools responsibly and effectively.

Each chapter moves the project one step forward:

Stage	What happens
Research	Use Copilot Chat to research AI best practices, regulations, and department-specific use cases
Draft	Move your research into Copilot Pages and build the first draft of your guide
Refine	Open the draft in Word and reformat it as a formal management proposal
Submit	Email the proposal to your supervisor for approval using Copilot in Outlook
Present	Turn the approved document into a team presentation using Copilot in PowerPoint
Survey	Build a knowledge quiz and feedback survey using Copilot in Forms
Analyse	Use Copilot in Excel to analyse the quiz results and surface insights
Launch	Run the launch meeting in Teams, with Copilot capturing questions, decisions and follow-ups
Automate	Build a simple weekly check-in agent in Copilot Studio to keep the feedback loop running

Sample files

Two practice files come with the workshop. Both are fictional, so you don't need real data.

File	Used in	What it is
Data_Privacy_AI_Acceptable_Use_Policy.pdf	Chapter 3	A fictional company policy for practising Work-mode grounding
AI_Guideline_Survey_Responses.xlsx	Chapter 9	100 simulated quiz responses across 8 departments

Download them from the workshop repository: **github.com/Asraf-JS/M365-Copilot-Workshop**.

Your Copilot training journey

One project, start to finish: build an AI Usage Guide for your department, using a different Copilot app at each step.

FOUNDATIONS

01
Copilot Fundamentals
The interface, licences, models and grounding

02
Prompt Engineering
Writing clear prompts with the GCSE framework

THE PROJECT, APP BY APP

03 RESEARCH
Copilot Chat
Research best practice and regulations
OUTPUT: **Research outline**

04 DRAFT
Copilot Pages
Shape the draft together with Copilot
OUTPUT: **First draft**

05 FORMALISE
Word
Turn the draft into a formal proposal
OUTPUT: **Formal proposal**

06 APPROVE
Outlook
Submit for approval and manage replies
OUTPUT: **Approval email**

07 PRESENT
PowerPoint
Present the guide to your team
OUTPUT: **Team briefing deck**

08 MEASURE
Forms
Check understanding and gather feedback
OUTPUT: **Quiz and survey**

09 ANALYSE
Excel
Analyse the responses and find gaps
OUTPUT: **Insights dashboard**

10 LAUNCH OPTIONAL
Teams
Run the launch meeting and follow up
OUTPUT: **Meeting recap**

11 AUTOMATE OPTIONAL
Copilot Studio
Automate weekly check-ins with an agent
OUTPUT: **Check-in agent**

Research → Draft → Formalise → Approve → Present → Measure → Analyse → Launch → Automate

01

CHAPTER 1

Copilot Fundamentals: Getting Started

By the end of this session you will be able to sign in to Microsoft 365 Copilot, find your way around the interface, run your first prompt, tune your personalization settings, and check Copilot's answers against their sources.

This guide is written for first-time users on either a Basic or a Premium license. Where the two behave differently, look for the **License note** callouts.

What you need: a work account with Microsoft 365, a browser, and about 60 minutes.

1. Copilot and your license

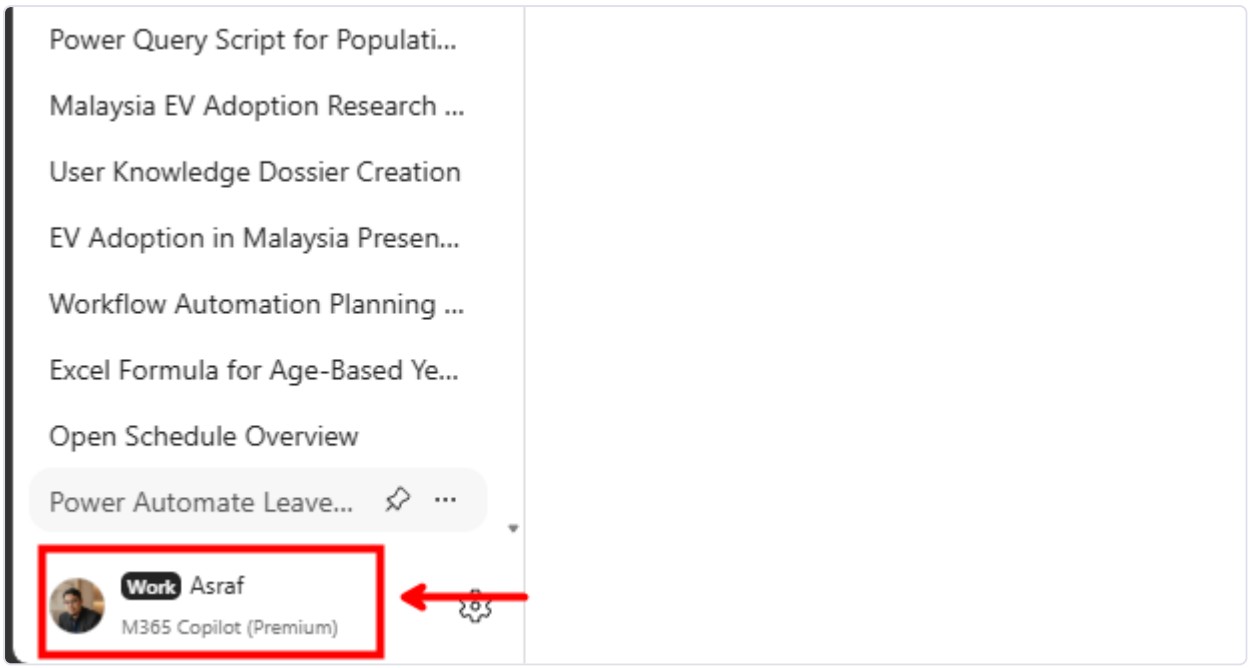
Microsoft 365 Copilot is Microsoft's AI assistant for work. What you can do with it depends on which license your organization has assigned to you.

License	How you get it	What it adds
Basic	Included with your Microsoft 365 work account	Chat with Copilot, grounded in the web
Premium	Paid monthly add-on on top of Microsoft 365	Work IQ (access to your work data), more model choices, agents such as Researcher and Analyst
AI credits / AI Hub	Pay-as-you-go, billed by tokens	Advanced features such as Cowork and Copilot Studio

Why it matters: two colleagues can open the same Copilot page and see different buttons. If your screen does not match the instructor's, check your license first (next section).

2. Sign in and check your license

1. Open your browser and go to **m365.cloud.microsoft**.
2. Sign in with your work account.
3. Look at the bottom-left corner of the screen. Your name appears with a label underneath, for example *M365 Copilot (Premium)*.



Your license label appears under your name, bottom-left.

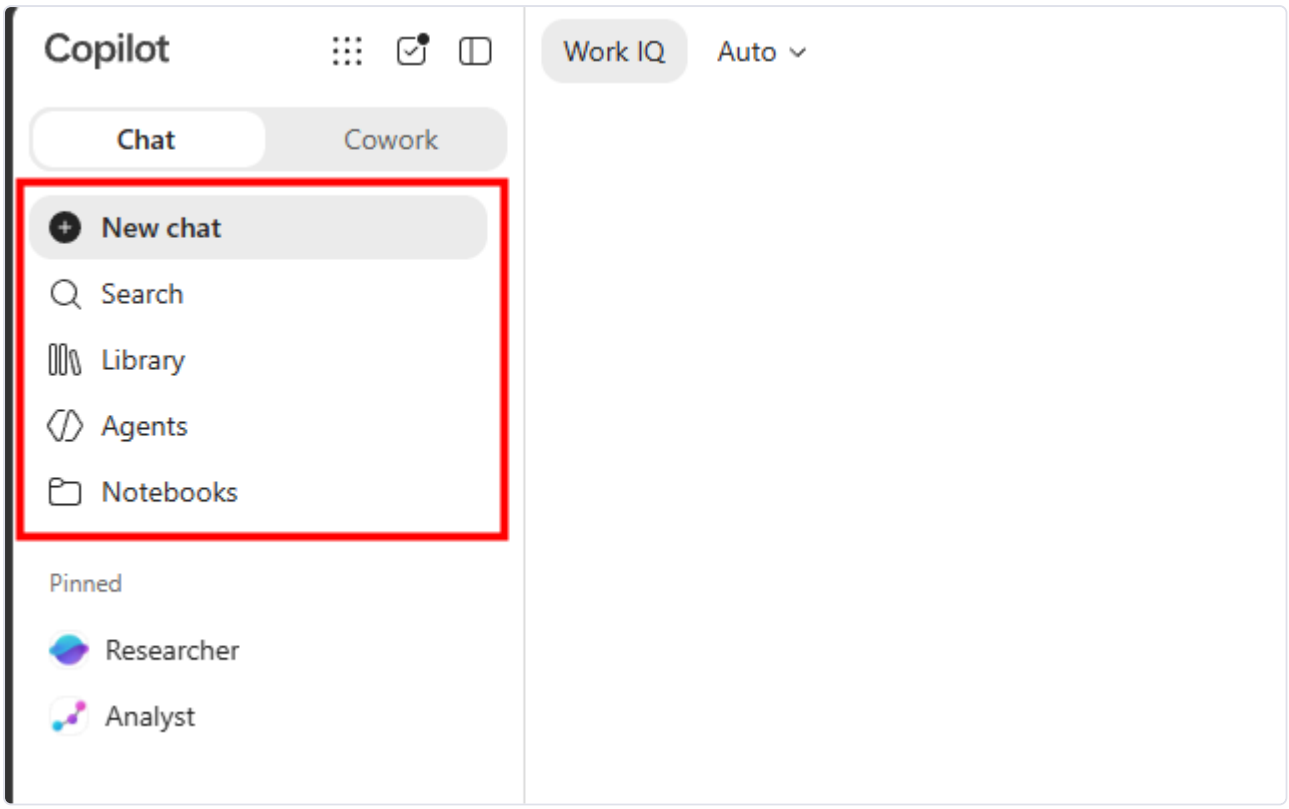
> **Try it:** read your label aloud. Does it say Premium or Basic? Keep it in mind for the rest of the session.

3. Tour of the interface

The screen has three zones: the sidebar on the left, the controls along the top, and the message box in the centre.

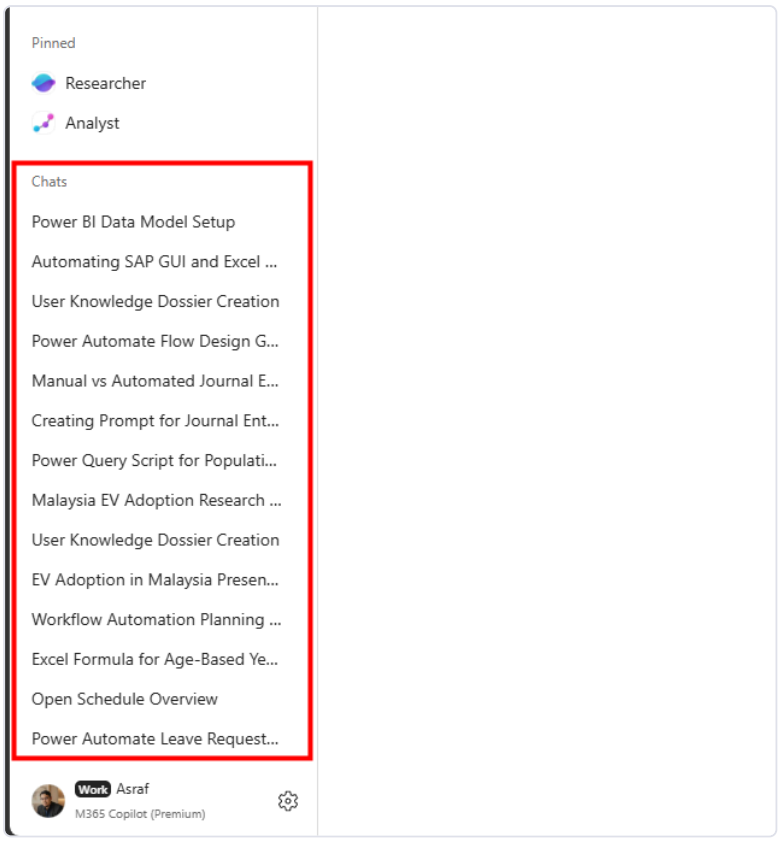
Sidebar (left)

Item	What it does
App launcher	Jump to other Microsoft 365 apps
Sidebar toggle	Collapse or expand the sidebar
Chat / Cowork	Switch between chatting and Cowork (Cowork needs AI credits)
New chat	Start a fresh conversation
Search	Find past chats
Library	Files and content you have created with Copilot
Agents	Specialised assistants, such as Researcher and Analyst
Notebooks	Group related chats and files together
Pinned	Agents you have pinned for quick access, such as Researcher and Analyst
Chats	Your chat history



The sidebar navigation.

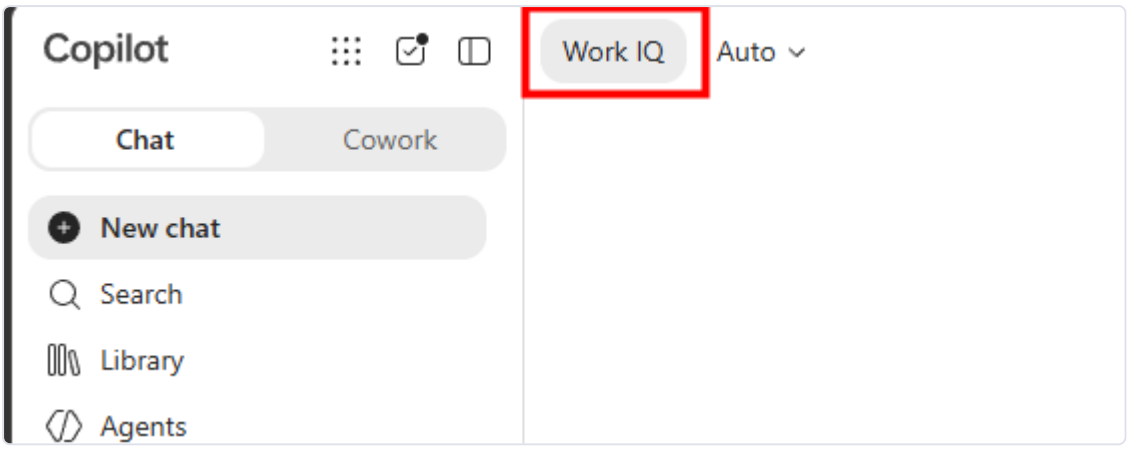
Chat history shapes your answers. Copilot takes your previous chats into account. If you are new, its answers may feel more generic, and the same prompt can give you and a colleague different results.



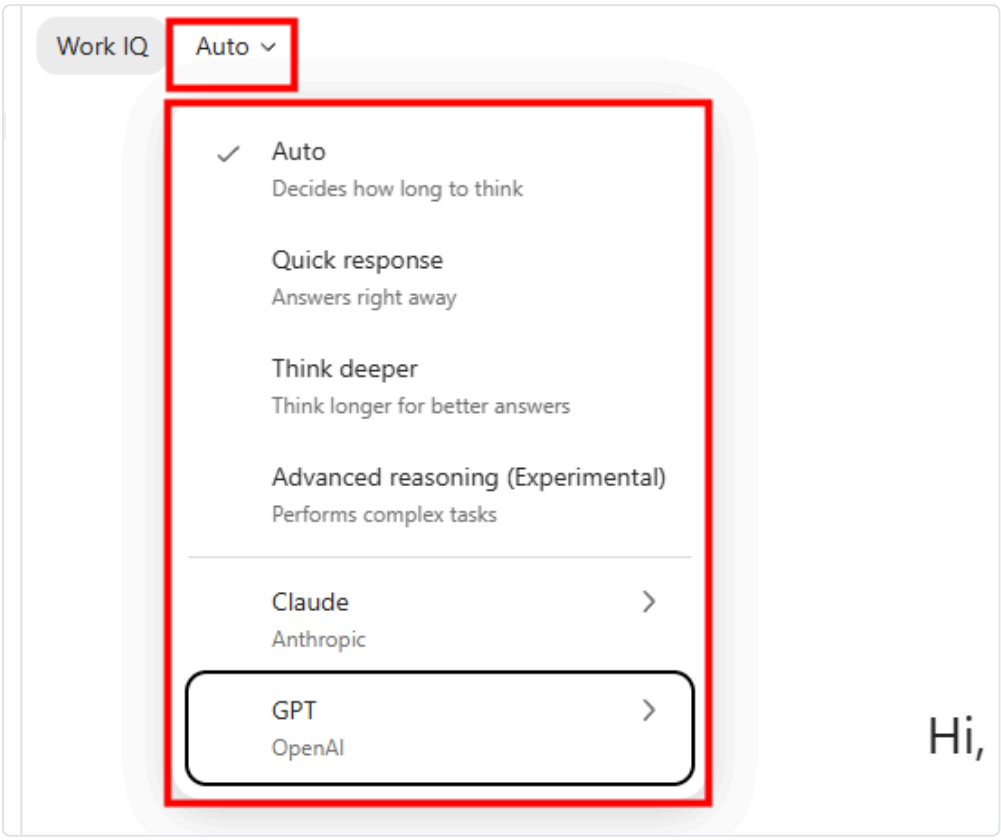
Your previous chats, listed under Chats.

Top bar

Control	What it does
Work IQ	Lets Copilot use your work data through Microsoft Graph: OneDrive, SharePoint, email, and more. A line through it means it is switched off
Auto (model selector)	Choose how Copilot thinks: Auto, Quick response, Think deeper, or Advanced reasoning. You can also pick a model family such as GPT or Claude
Shield icon	Enterprise Data Protection (EDP) is on
Temporary chat	Chat without saving the conversation to your history



Work IQ, top-left of the chat area (Premium only).



The model selector, opened from the Auto button.

> **License note:** Work IQ appears only on Premium. Basic users may see GPT models only, while Premium users may also see Claude. Your organization's settings can change what appears.

Enterprise Data Protection: what it does and does not mean

It does keep your prompts and files from being used to train the underlying AI models.

It does not make your chats private from your organization. IT can still review chat history and searches using built-in compliance tools.



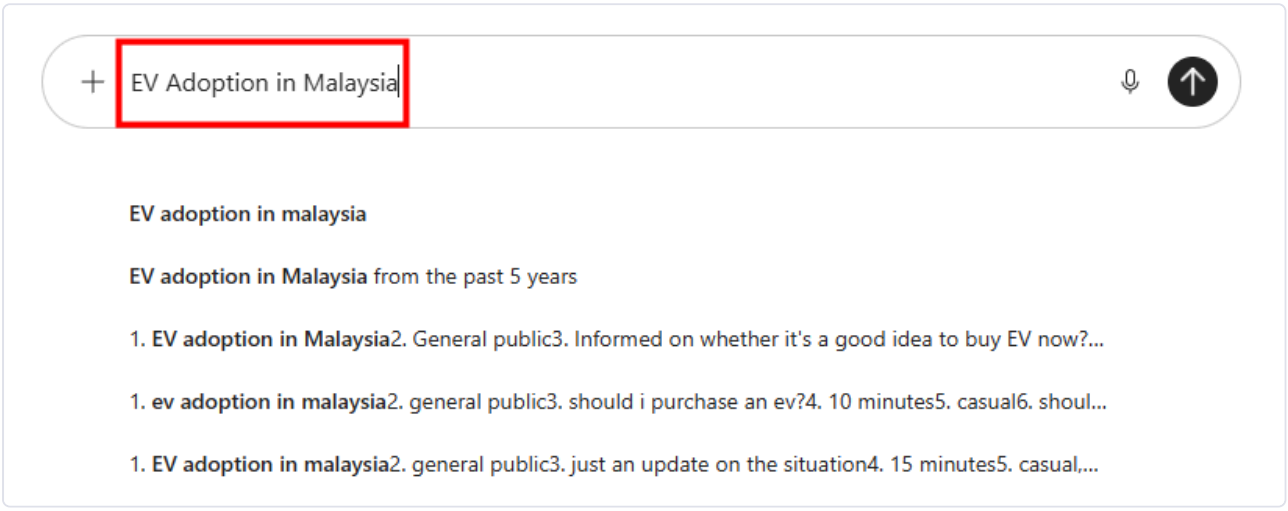
The green shield confirms Enterprise Data Protection. Temporary chat sits right next to it.

Treat Copilot like your work email: secure, but not personal.

4. Your first prompt

A prompt is the instruction you type into the message box. Start with a simple one.

1. Click inside **Message Copilot**.
2. Type: `EV adoption in Malaysia`
3. Press **Enter** or click the arrow to send.



Your first prompt in the message box.

Copilot replies with a structured overview: headings, a summary table, and source labels.

Why your answer differs from your neighbour's

Reason	What it means
Temperature	AI models add a little randomness, so wording and detail vary each time
Chat history	Copilot draws on your past conversations
Personalization	Your custom instructions, memories, and work profile shape the reply
Work IQ	Premium users may get answers that include their own files

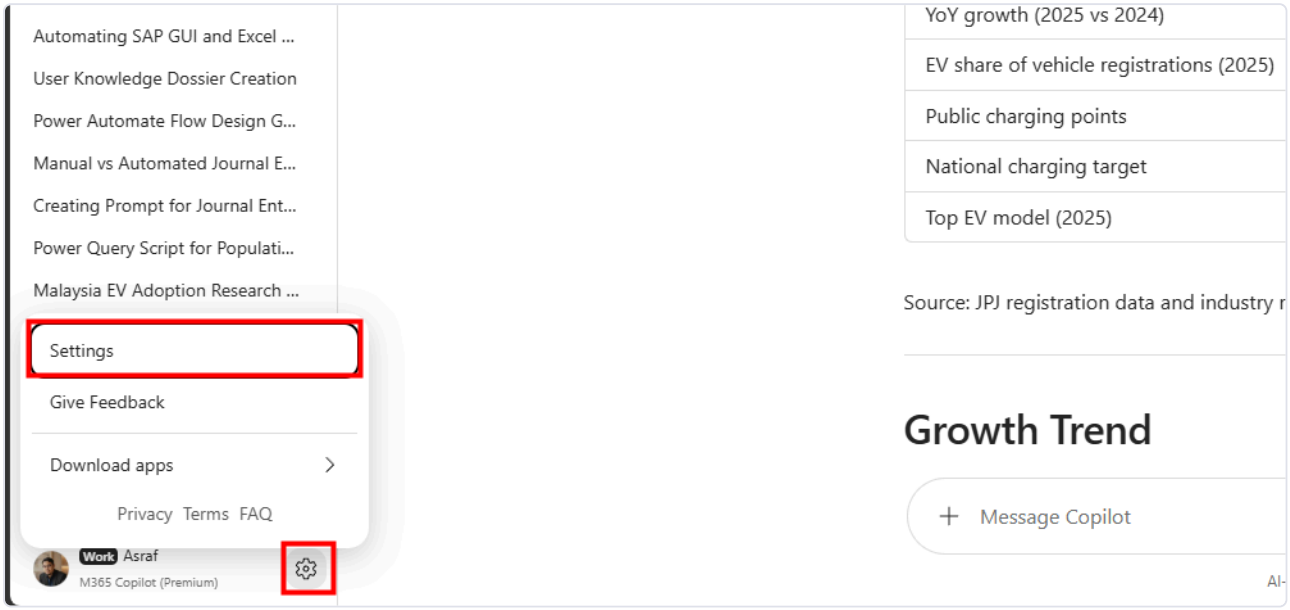
Different is normal. What matters is whether the answer is accurate, and section 6 shows how to check.

5. Personalize Copilot

Personalization controls how Copilot tailors its answers to you.

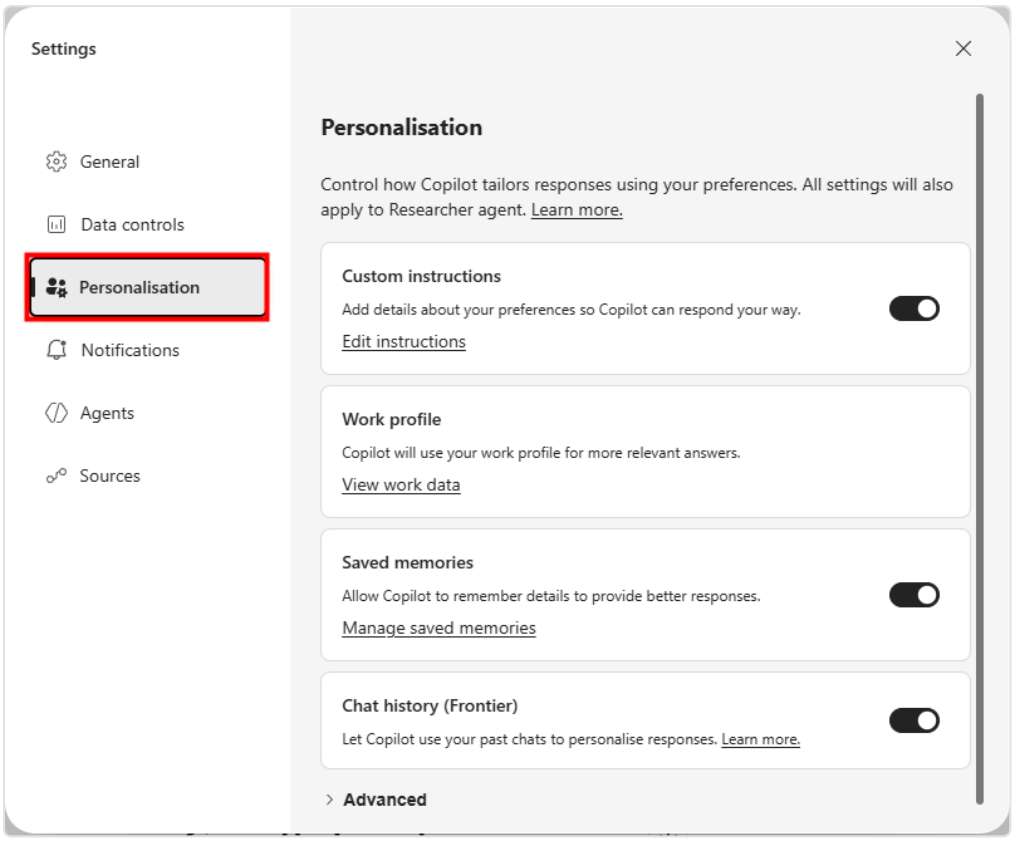
Open Settings (two ways)

- Click the **gear icon** at the bottom-left, then **Settings**.
- Or click the **ellipsis (...)** at the top-right, then **Settings**.



Opening Settings from the gear icon.

Then choose **Personalisation** (the menu uses British spelling).



The Personalisation panel.

The four options

Setting	What it does	When to use it
Custom instructions	Tell Copilot how you want it to respond: tone, format, your role	Set once; saves you repeating yourself in every prompt
Work profile	Uses your organization's profile data to make answers relevant to your job	Set up by your organization
Saved memories	Remembers facts you ask it to remember	Say "remember that..."; review under **Manage saved memories**
Chat history (Frontier)	Lets Copilot use past chats to personalize replies. Frontier means it is a preview feature	Turn off if you want each chat to start fresh

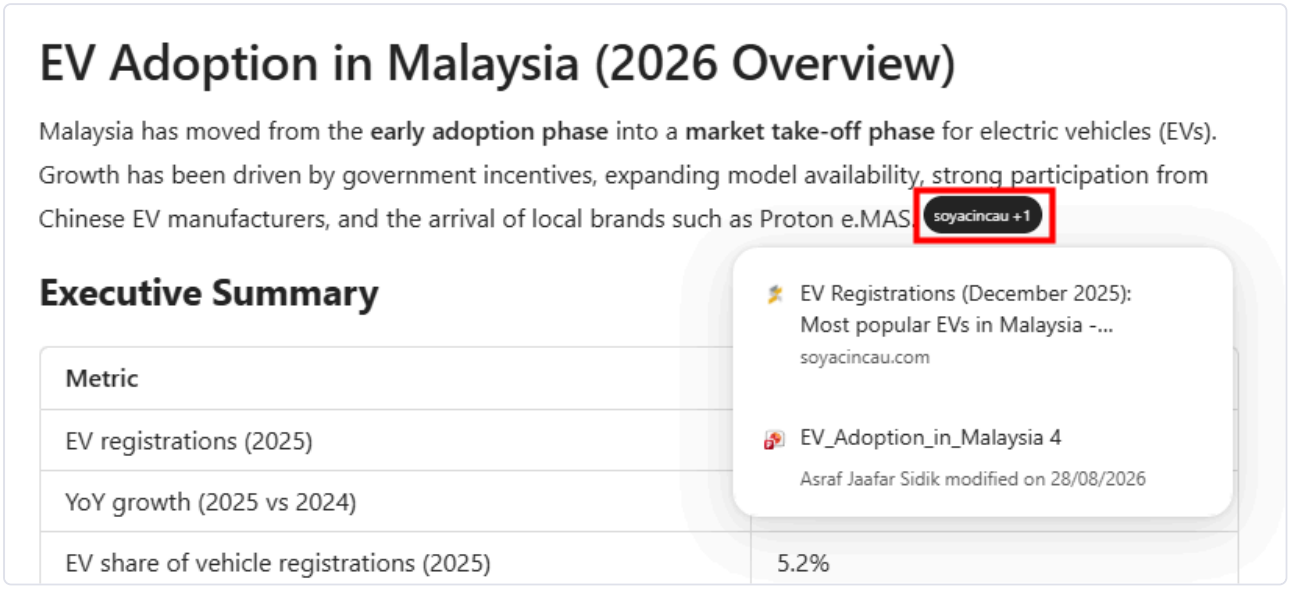
> **Try it:** click **Edit instructions** and write two or three lines about your role and how you like answers formatted. Run your EV prompt again and compare. For a fuller template, see Exercise 6 in the prompts.

6. Check the sources

AI can **hallucinate**: state something confidently that is wrong or made up. Copilot reduces this through **grounding**: it ties its claims to real sources and shows you where each one came from.

How to check a fact

1. Find the small grey source label at the end of a sentence (for example, *soyacincau +1*).
2. Hover over it to see every source behind that claim.
3. Click a source to open it and confirm the number or statement yourself.



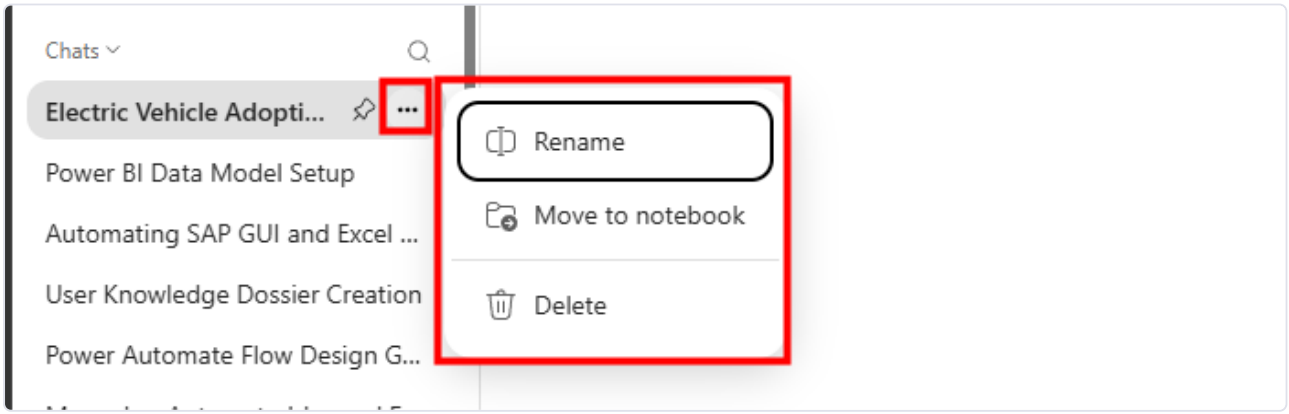
Hovering a source label reveals both a website and an internal SharePoint file.

Sources can be public websites or, on Premium with Work IQ on, your own SharePoint and OneDrive files. In the EV example, one figure came from a news site and from a PowerPoint deck in SharePoint.

> **Good habit:** before you put a Copilot number in a report or email, open at least one of its sources. Copilot is a strong first draft, not the final word.

7. Manage your chats

Hover over any chat in the sidebar and click the three dots (**...**).



The chat menu.

Action	What it does
Rename	Give the chat a clearer name so you can find it later
Move to notebook	File it with related chats and files
Delete	Remove the chat; Copilot will no longer draw on it for new chats

> **Tip:** delete chats that went in the wrong direction. Since Copilot learns from your history, a tidy history gives better answers.

8. Write better prompts with GCSE

A prompt is just an instruction, and a bare one gives you a generic answer. There are many prompting frameworks (zero-shot, few-shot, chain of thought, CRAFT), but the one Microsoft recommends for Copilot is **GCSE: Goal, Context, Source, Expectations**. Spelling out all four turns a vague request into a precise brief. Topic 02 goes deeper; this is the short version.

Part	What it covers
Goal	The one thing you want produced, in a sentence. *Create an AI usage guideline manual for our workplace.*
Context	The background and the why: the situation, the audience, what is at stake
Source	What Copilot should reference or use: the files, policies, data or web sources to base the answer on, for example *the attached report* or *Malaysia's PDPA 2010*
Expectations	The shape of the answer: what to cover, structure, tone, length, and format, for example a Point, Evidence, Explanation, Implication structure with an executive summary

> **Try it:** run the bare prompt first, `Create a report on EV adoption in Malaysia`, then run the full GCSE version and compare. The difference in quality is the whole point of the framework.

Worked example: a GCSE prompt

```
Goal: Create an AI usage guideline manual for our workplace.

Context: Our organisation is introducing Microsoft 365 Copilot
across departments and needs a clear, practical policy so staff
use AI responsibly. Employees have mixed levels of AI experience,
and leadership wants to protect confidential data while
encouraging adoption.

Source: Base it on Microsoft's Responsible AI principles,
Malaysia's Personal Data Protection Act (PDPA 2010), and any
existing IT security or data protection policies in our
organisation.

Expectations: Cover acceptable and unacceptable uses, data
```

```
privacy and confidentiality, human review of AI output, roles
and responsibilities, and practical do's and don'ts for
everyday tasks, with examples relevant to our work and a short
FAQ. Write it as a clear, professional manual for non-technical
staff, organised with headings and short sections, in plain
language, with a one-page summary at the front that people can
read in two minutes.
```

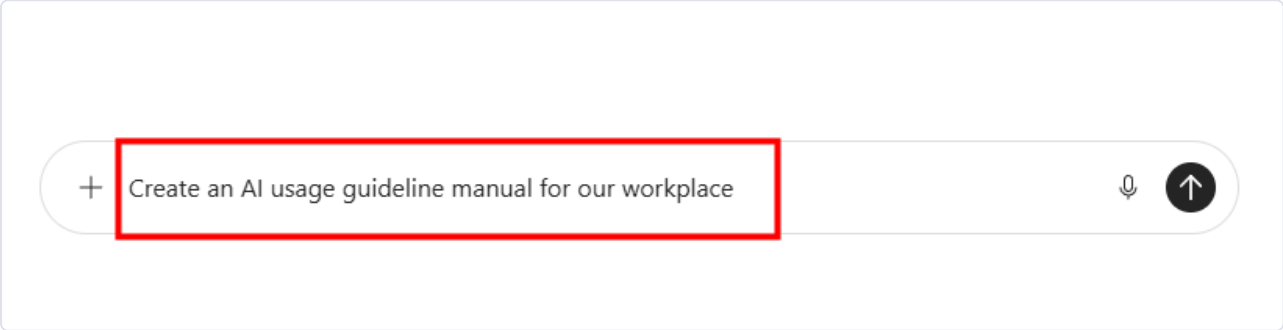
This is the prompt the rest of the guide builds on: you will run it across different models, save it, and ground it in your own files in the sections that follow.

9. Compare models with one prompt

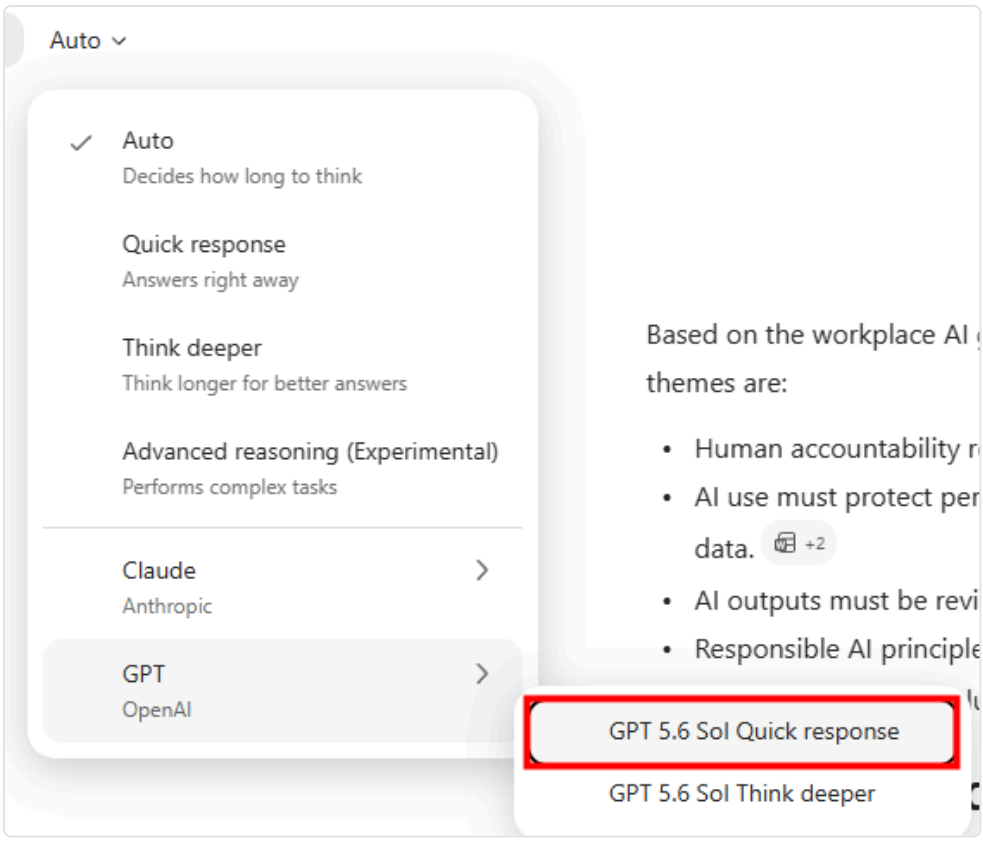
The same prompt can give quite different answers depending on which model answers it. In this lab you run one simple prompt several times, switching models each time, and compare what comes back.

The lab

1. Check that the model selector in the top bar shows **Auto**.
2. Type the prompt below and send it: `Create an AI usage guideline manual for our workplace`
3. Open the model selector, switch to **Think deeper**, and run the same prompt again.
4. Repeat with **Claude Opus**, then with **GPT**.
5. Put the answers side by side and compare them using the table below.



The lab prompt typed into the message box, with Auto selected.



Switching models: the selector with the GPT options expanded.

> **Tip:** start a new chat for each run, so the earlier answer doesn't influence the next one.

What to compare

Look at	Questions to ask
Structure	Does it read like a usable manual, with clear sections and headings?
Depth	Does it go beyond generic advice? Reasoning modes take longer but usually go deeper
Sources	Did it cite web pages, or files from your own organisation?
Speed	How long did you wait, and was the extra wait worth it?

> **License note:** Claude Opus is available on the Premium license only. Basic users can still run this lab by switching between GPT 5.6 Sol Quick response and Think deeper.

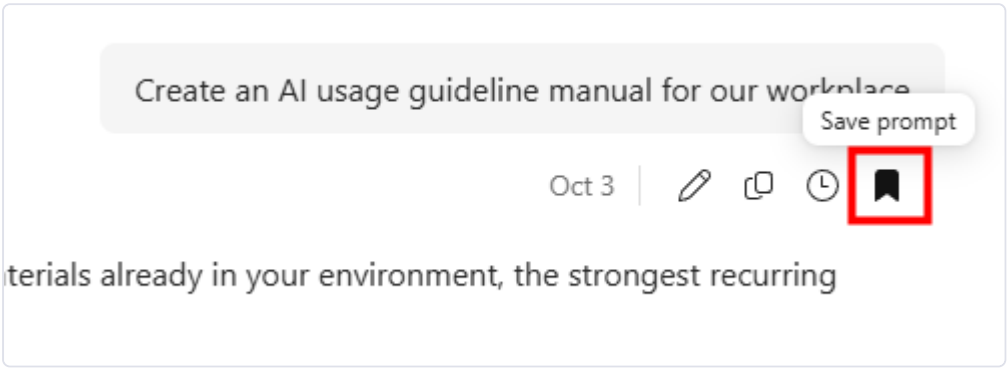
Why it matters: there is no single best model. Choosing the right model for the job is a skill, and this lab is the fastest way to build it.

10. Save and reuse prompts

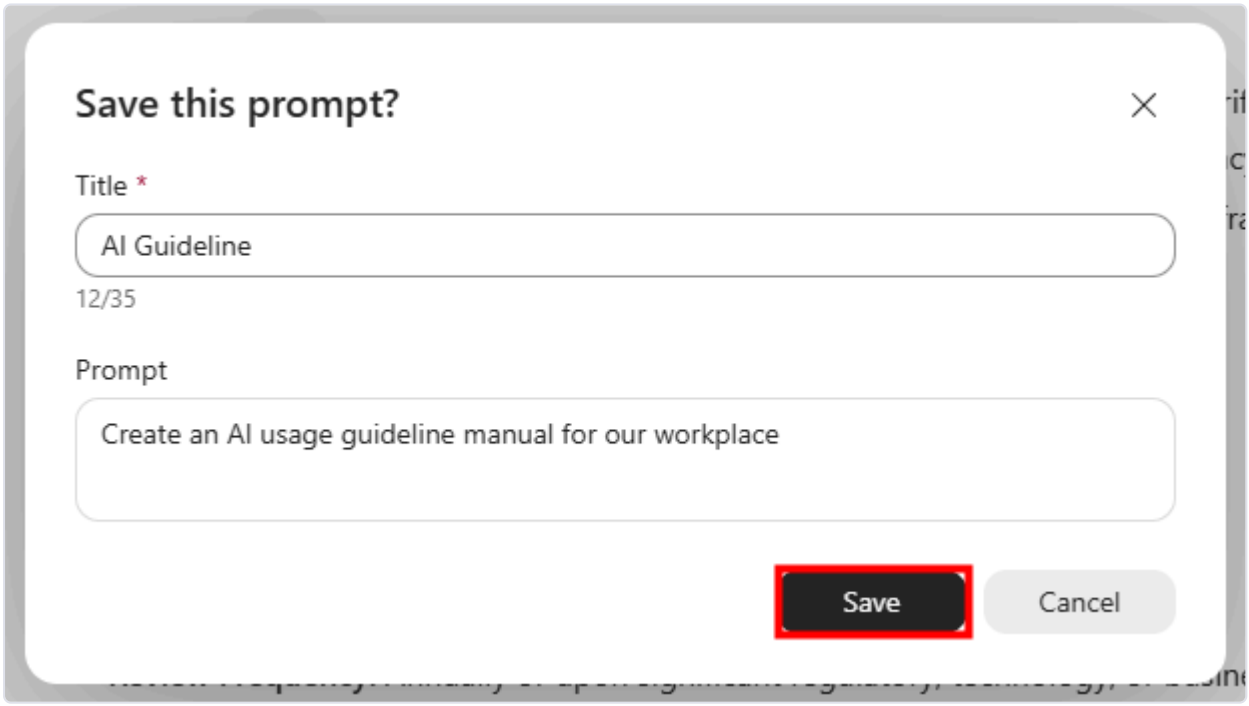
A prompt that works well is worth keeping. Copilot lets you save prompts and find them again in **Prompt Lab**.

Save a prompt

1. Hover over a prompt you sent.
2. Click **Save prompt** (the bookmark icon).
3. In the **Save this prompt?** dialog, give it a clear title, for example *AI Guideline*, and save.



The Save prompt (bookmark) icon appears when you hover over a prompt.

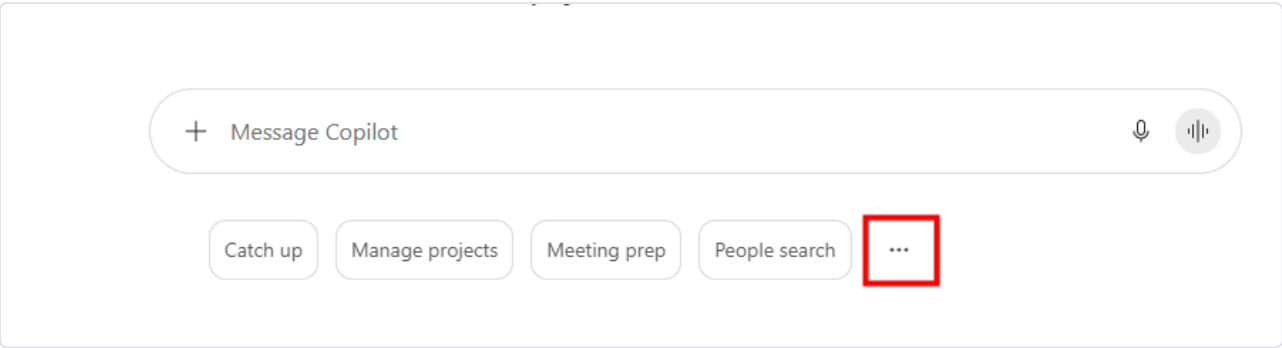


The Save this prompt? dialog. The title is editable; the prompt text is not.

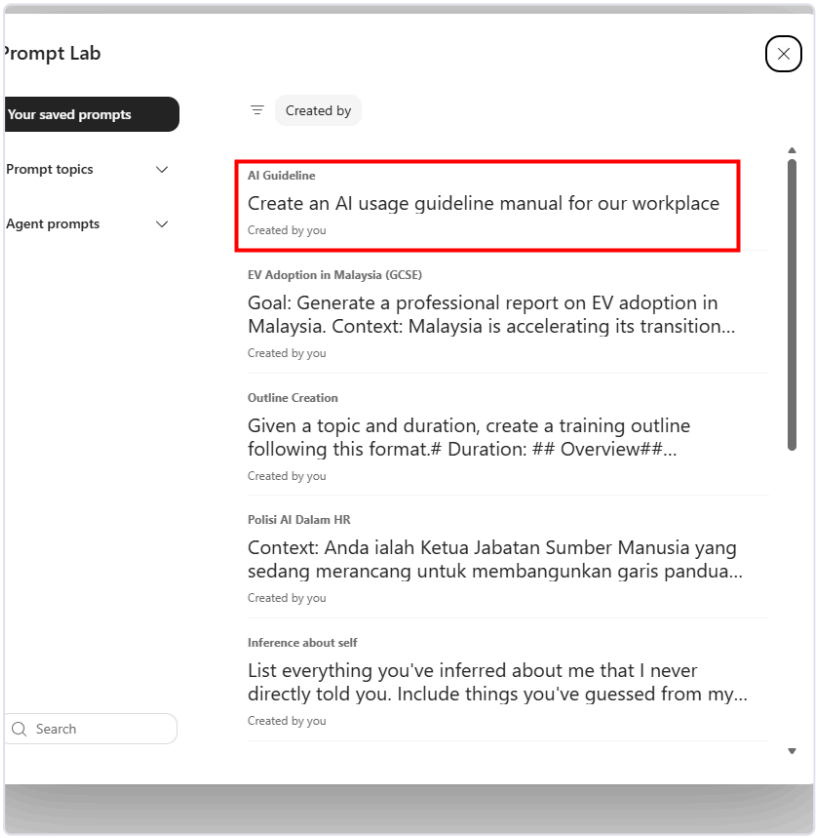
You can change the title, but not the prompt text itself. If the prompt needs improving, edit and resend it first, then save the better version.

Find it again in Prompt Lab

1. Start a new chat.
2. Click the ellipsis (**...**) under the message box and choose **Prompt Lab**.
3. Open **Your saved prompts**.



The ellipsis (...) under the message box opens Prompt Lab.



Prompt Lab, with the saved AI Guideline prompt at the top of Your saved prompts.

Action	What it does
Try with Copilot	Runs the saved prompt in a chat
Copy link	Copies a link to the prompt
Share	Shares the prompt with colleagues

Delete	Removes the prompt from your list

11. From chat to a Page: collaborate on the answer

So far you have worked with Copilot like a chat, the same back-and-forth you'd have in Teams, WhatsApp, or Telegram. That works, but it has a weakness. Each time you ask Copilot to adjust an answer, it regenerates the whole thing, and small details drift between versions.

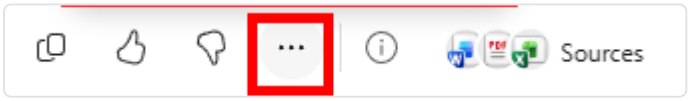
Picture it. You ask for the AI guideline manual and Copilot gives you three topics. You like them, so you ask it to add a title. It returns the title, topic one, and topic two, and topic three has quietly vanished. You point that out, Copilot agrees and puts it back, but now something else has changed. This back-and-forth is tedious, and the output is inconsistent.

For work you want to shape and keep, move the answer out of chat and into a **Page**. A Page is a shared canvas, powered by Microsoft Loop, where you and Copilot edit the same document together instead of regenerating it each turn. Topic 04 covers Pages in depth.

The response toolbar

Under every Copilot response is a row of actions:

Action	What it does
Copy	Copies the response text
Thumbs up	Tells Copilot you want more answers like this
Thumbs down	Tells Copilot you want fewer answers like this
Ellipsis (...)	Opens more options (below)
Sources	Lists the files and web pages behind the response

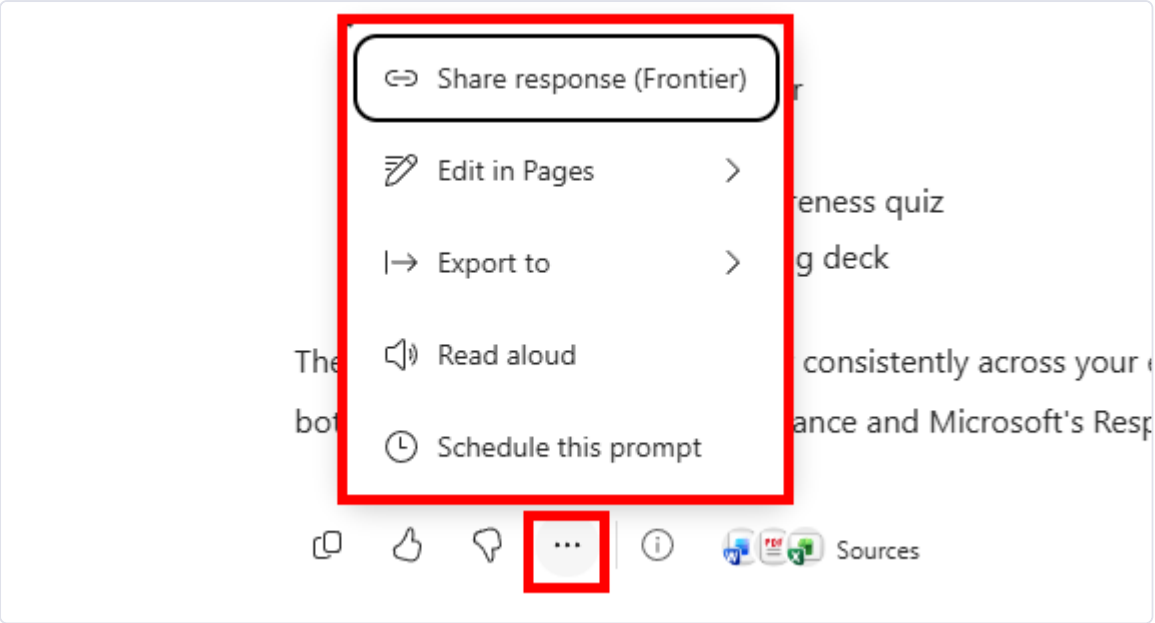


The toolbar under every response: copy, thumbs up, thumbs down, the ellipsis (...), and Sources.

The ellipsis menu

Clicking the ellipsis (**...**) opens more options: **Share response**, **Edit in Pages**, **Export to** (for example to Word), **Read aloud**, and **Schedule this prompt**.

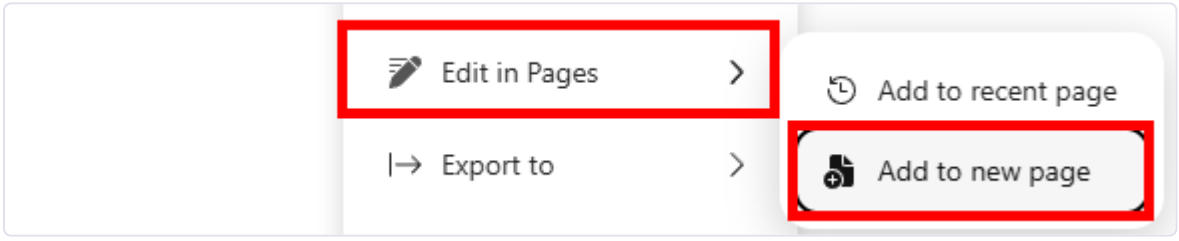
Two things to know. Where you see **Frontier**, that feature is in preview. And some of these options are Premium only.



The ellipsis menu: Share response (Frontier), Edit in Pages, Export to, Read aloud, and Schedule this prompt.

Open the answer as a Page

1. Click the ellipsis (**...**) under the response.
2. Choose **Edit in Pages**.
3. Choose **Add to new page** (or **Add to recent page** to append to one you already have).



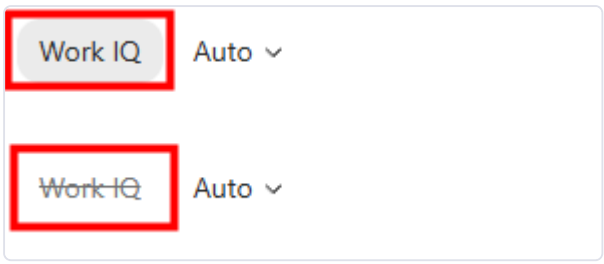
Edit in Pages, then Add to new page, opens the response as a Page you can edit with Copilot.

Why it matters: a Page lets you collaborate with Copilot on one living document, so the parts you've settled stay put while you refine the rest. It is especially valuable on a Basic license, where you can't collaborate with Copilot inside Microsoft Word. The Page gives Basic users that shared workspace.

12. Ground Copilot in your work data (Work IQ)

In section 6 you saw that grounding ties Copilot's answer to real sources. The **Work IQ** button in the top bar decides where Copilot looks for those sources.

Work IQ	What Copilot searches
On	Your work environment through Microsoft Graph: OneDrive, SharePoint, Teams chats, and Outlook, plus the web
Off (shown struck through)	The web and the model's general knowledge only



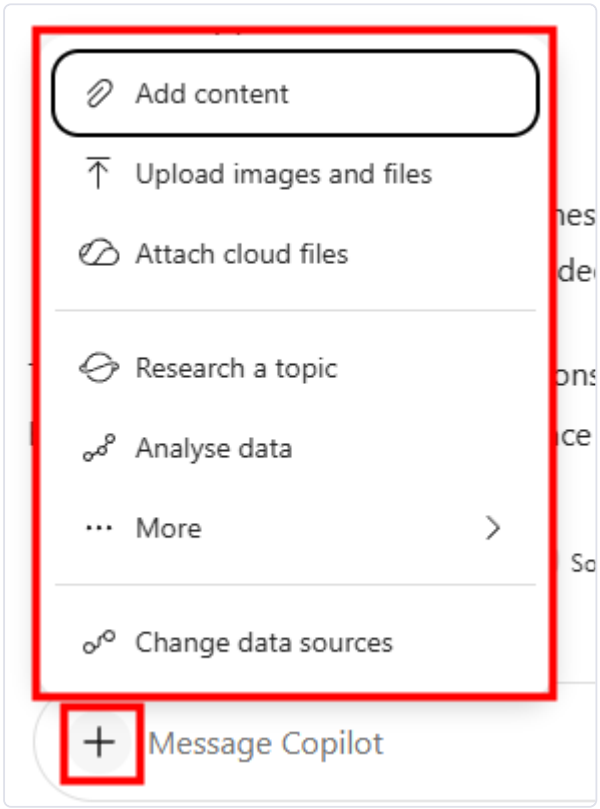
Work IQ on (top) and off, shown struck through (bottom).

Try it: run the AI guideline prompt from section 8 with Work IQ on, then again with it off. With Work IQ on, the answer may draw on policy documents already in your organisation and cite them. With it off, you get a generic answer grounded on the web.

License note: Work IQ is a Premium feature. Basic users ground Copilot manually by adding files, covered in the next section.

13. Add your own files (the plus menu)

The plus (**+**) button to the left of the message box lets you choose what Copilot works from.



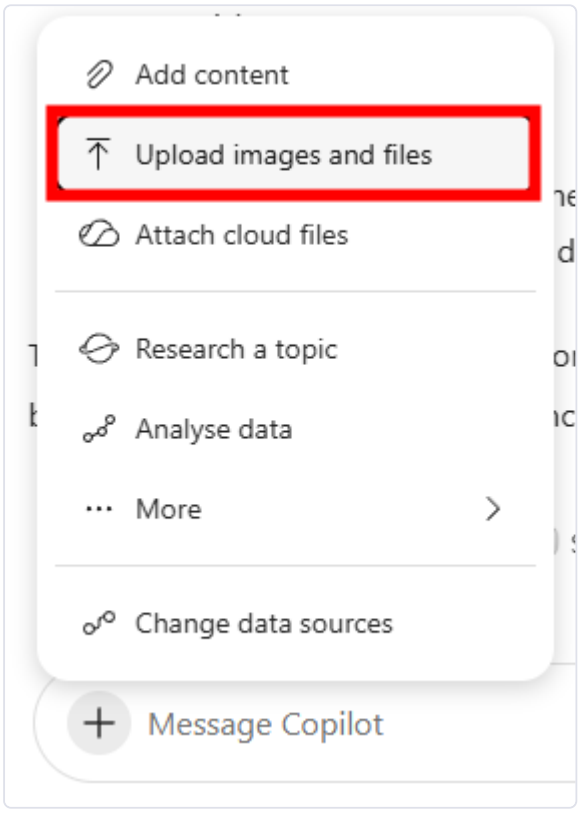
The plus (+) menu and its options.

Option	Use it for

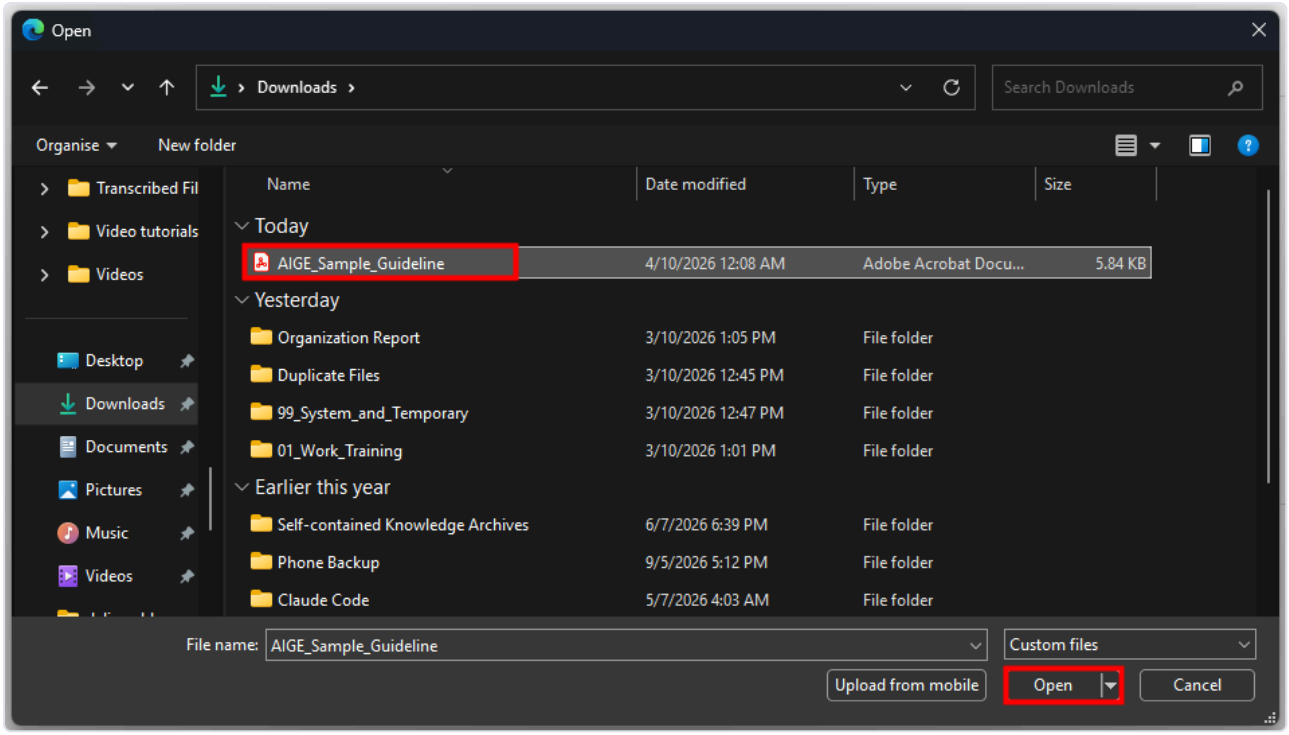
Add content	Adding content such as a file already in your cloud storage
Upload images and files	Files on your local computer only
Attach cloud files	Files already in OneDrive or SharePoint
Research a topic	Starting a focused research task
Analyse data	Starting a data-analysis task
More	Further options
Change data sources	Choosing where Copilot draws its data from

Upload a file from your computer

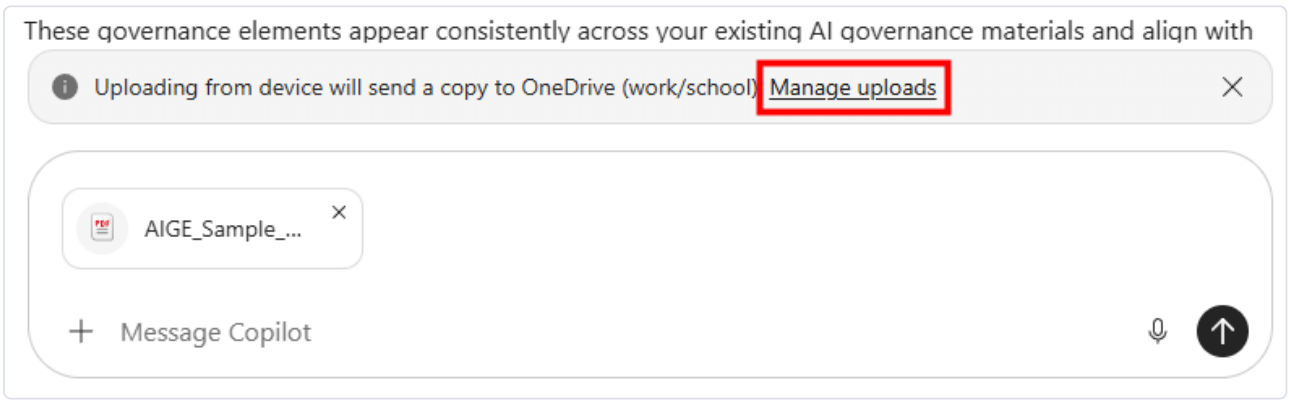
1. Click **+** and choose **Upload images and files**.
2. Select the file, for example the sample AI guideline, and click **Open**.
3. A banner confirms that uploading from your device sends a copy to OneDrive.
4. Ask your question about the file.



Choose Upload images and files for a file on your computer.



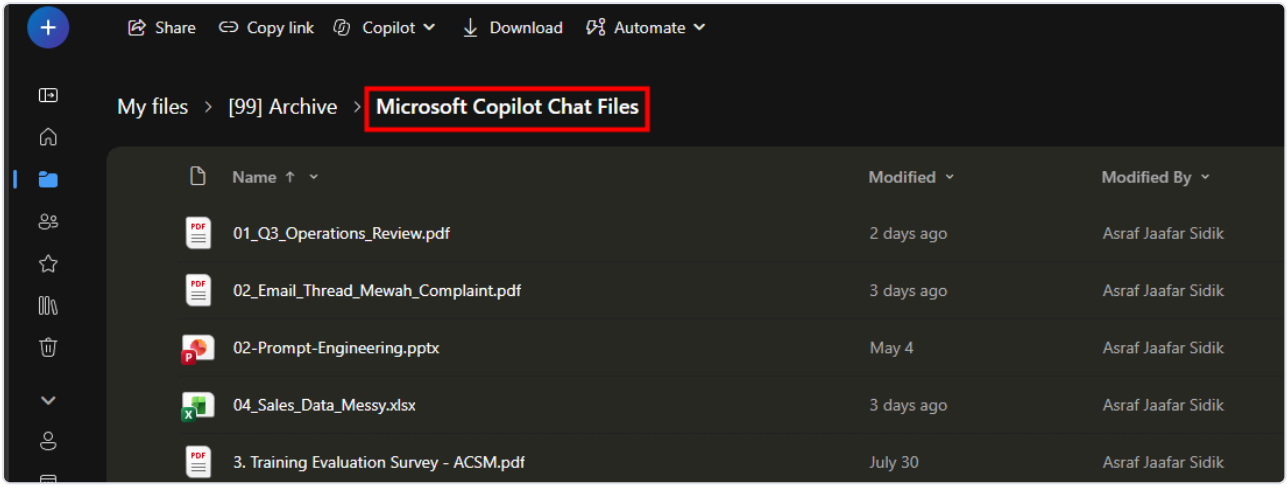
Selecting the sample guideline in the Open dialog.



The banner confirms a copy goes to OneDrive. Manage uploads opens the folder.

Where your uploads go

Every upload saves a copy to a OneDrive folder called **Microsoft Copilot Chat Files**. The **Manage uploads** link in the banner opens it.



Uploaded files collect in the Microsoft Copilot Chat Files folder in OneDrive.

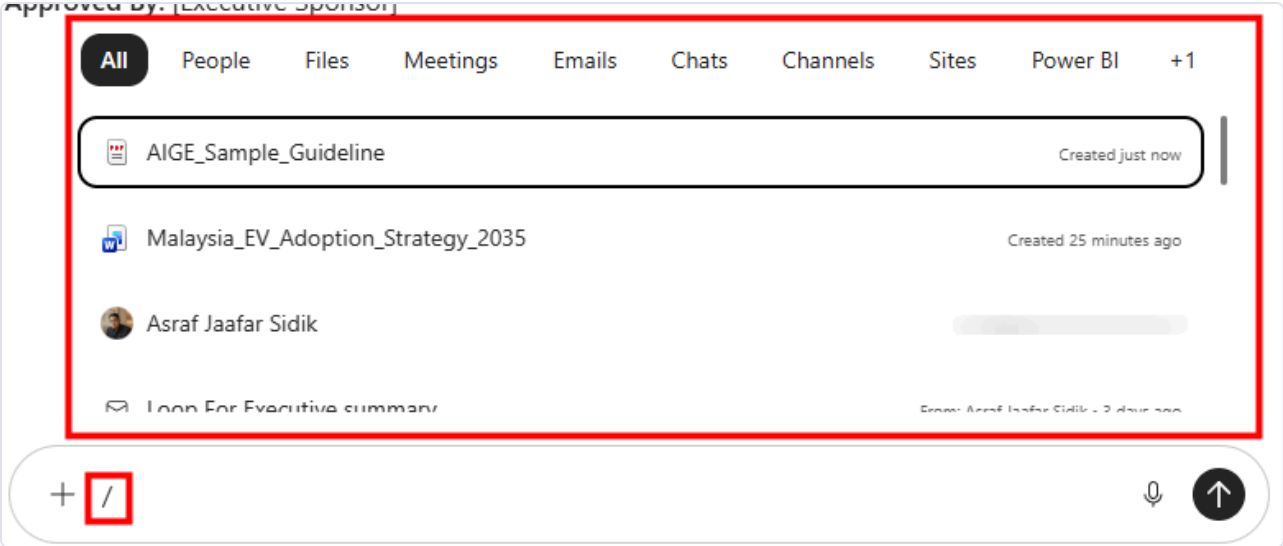
> **Good habit:** check that folder before you upload. If the file is already there, use **Attach cloud files** instead of uploading again, so you don't fill your OneDrive with duplicate copies of large files.

> **License note:** this is the main way Basic users ground Copilot in their own documents. Basic cannot pull files from SharePoint or OneDrive automatically, so download the file and upload it. Premium users can also let Work IQ find files for them.

> **Try it:** upload a sample guideline (the screenshots use *AIGE_Sample_Guideline.pdf*; you can also use Data_Privacy_AI_Acceptable_Use_Policy.pdf from Topic 03) and ask: `Summarise the key principles in this guideline and list what end users must do.`

14. Find resources with the slash (/) command

Type **/** in the message box to open a resource picker. Tabs across the top filter by type: All, People, Files, Meetings, Emails, Chats, Channels, Sites, and Power BI, with more under **+1**. Type a keyword to narrow the list, then click a resource to add it to your prompt.



Typing / opens the resource picker, with the uploaded guideline at the top.

> **Try it:** type `/` followed by the name of the guideline you uploaded, select it, and ask a question about it.

> **License note:** the Emails, Meetings, Chats, Channels, and Sites tabs are Work IQ sources, so the full picker is effectively a Premium experience. Basic users see a much thinner version, mostly limited to files they have uploaded or opened.

Key AI terms

You will hear these terms throughout the workshop.

Term	One-line meaning
LLM	AI trained on text to understand and generate language (GPT, Claude, Gemini)
GenAI	AI that creates new content: text, images, code, summaries
Prompt	Your instruction to the AI
Context	Background info you give alongside your prompt
Grounding	Tying the AI's answer to real sources you can check
Hallucination	When AI generates plausible but incorrect information
Temperature	The randomness setting that makes AI responses vary
Token	The unit of text an LLM processes; roughly 0.75 words
Context window	The working memory an LLM can see at one time

RAG	Retrieving from a specific knowledge source before responding; what Work IQ does with your files
Agentic AI	AI that takes actions, not just answers questions
Notebook	A place to group related chats and files for a project

HANDS-ON

Hands-on exercises

Work through each exercise in order. Each one has a clear instruction on where to run it, which grounding mode to use, and which model to select.

Exercise 1 - Understand what Copilot is

Where: Open a new chat in Copilot Chat at m365.cloud.microsoft
Grounding: Web
Model: Auto

Start with this prompt to set the context for the rest of the exercise:

```
Explain Microsoft 365 Copilot in simple terms for someone
who has never used AI tools before. Use a short analogy
and keep it under 100 words.
```

Stay in the same chat and follow up with:

```
What is the difference between Microsoft Copilot (free)
and Microsoft 365 Copilot (paid)? Give me a comparison
table with 4 key differences.
```

Then:

```
What does it mean when people say Copilot is "grounded
in your Microsoft 365 data"? Give me a practical example
using Outlook and SharePoint.
```

Exercise 2 - Learn the key terms

Where: Continue in the same chat from Exercise 1
Grounding: Web
Model: Auto

Run each prompt one at a time. Read the response before moving to the next one.

```
Explain what a "hallucination" is in the context of AI.
Give me one example of how it might happen in a workplace
setting, and one way to catch it.
```

```
What is RAG (Retrieval-Augmented Generation) and why does
it matter for Microsoft 365 Copilot? Explain it without
using technical jargon.
```

```
What is a token in the context of large language models?
How does token limit affect the way I use Copilot with
long documents?
```

```
Explain the difference between a context window and memory
in AI tools. How does this affect the way I use Copilot
across multiple sessions?
```

```
What is "temperature" in the context of AI language models?
Why does the same prompt sometimes give different answers
in Copilot?
```

Exercise 3 - Responsible AI and Malaysian context

Where: Continue in the same chat from Exercise 2
Grounding: Web
Model: Auto

```
What are Microsoft's responsible AI principles? Summarise
them in bullet points with one practical implication of
each for an office worker.
```

```
What are 3 things I should never input into an AI tool
like Microsoft 365 Copilot? Explain the risk behind
each one.
```

```
How does Malaysia's Personal Data Protection Act
(PDPA 2010) apply to employees using AI tools like
Microsoft 365 Copilot at work? Give me 3 practical
rules to follow.
```

Exercise 4 - Test the model switcher

Where: Start a new chat
Grounding: Web
Model: Start with Auto, then repeat with Opus (Claude), then GPT

Run the same prompt in all three models and compare the responses side by side.

```
Write a one-paragraph welcome message for a new employee
joining a Malaysian company that has just introduced an
AI Usage Guideline. Tone: warm and professional.
```

After comparing, ask yourself:

- Which version is clearer?
- Which one sounds more natural for your workplace?

- Which would you edit less before sending?

> **Note:** To switch models, click the model selector (it shows **Auto** by default) in the top bar and pick from the list. Start a new chat for each run so the earlier answer doesn't influence the next one. Claude Opus is Premium only; Basic users can compare Quick response and Think deeper instead.

Exercise 5 - Experience the context window

Where: Start a new chat
Grounding: Work
Model: Auto

This exercise shows how Copilot holds context within a session, and loses it when you start a new one. Run the prompts in sequence without starting a new chat between them.

Step 1 - Set the context:

```
I am drafting an AI Usage Guideline for my department.
My department handles customer complaints at a mid-sized
Malaysian logistics company. Keep this in mind for
everything that follows.
```

Step 2 - Ask a follow-up question:

```
What are the top 3 risks my department should address
in the guideline?
```

Step 3 - Test recall:

```
Summarise everything we have discussed so far in this
conversation into 5 bullet points.
```

Step 4 - Start a new chat and run this:

```
Summarise everything we have discussed so far in this
conversation into 5 bullet points.
```

Notice that Copilot has no memory of the previous conversation. This is the context window in action.

Exercise 6 - Write your personalisation prompt

Where: Start a new chat
Grounding: Web
Model: Auto

A personalisation prompt is a standing briefing you paste at the start of any new chat session. It tells Copilot your role, context, and preferences so you don't have to repeat yourself every time.

Below is a detailed example written for a trainer context. Read through it to understand the structure, then use the template below it to write your own.

Example - trainer context

```
# ROLE
Act as a corporate IT trainer assistant supporting
Microsoft 365, Power Platform, Data Analytics, and
AI adoption training.

# CONTEXT
The user is a Malaysia-based freelance IT trainer
delivering corporate workshops via training providers.
Typical clients include enterprise organisations in
banking, pharma, and logistics.

Focus areas:
- Microsoft 365 (Excel, PowerPoint, Word, Teams, SharePoint)
- Power Platform (Power BI, Power Apps, Power Automate, Dataverse)
- AI tools (ChatGPT, Microsoft Copilot, Google Gemini, NotebookLM)

The user frequently designs:
- Training outlines (1 to 2 days)
- Trainer scripts and hands-on lab exercises
- Client proposals and email responses
- PowerPoint decks and Word handouts

# OUTPUT STYLE
- Professional, corporate tone
- Structured formatting with clear headings, bullet
  points, and tables where useful
- Concise and practical - avoid theory-heavy explanations
- Focus on real-world business use cases relevant to
  Malaysian or general corporate contexts

# TRAINING DESIGN PREFERENCES
- Prefer hands-on learning (target 70 to 90 percent practical)
- Include step-by-step exercises and realistic business scenarios
- Avoid overly academic or generic explanations

# AI USAGE EXPECTATIONS
- Apply prompt engineering best practices: clear role,
  task, constraints, and output format
- Suggest ways to use AI tools in workflows, not just explanations
- Provide improved prompts when relevant

# CONSTRAINTS
- Avoid emojis
- Avoid overly long explanations
- Avoid generic textbook-style content
- Prioritise practical, usable output
- Do not use em dashes
```

Template - adapt this for yourself

Copy this, fill in the brackets, and paste it as your first message in any new Copilot Chat session.

```
# ROLE
Act as [describe the assistant role you need - e.g.,
```

```
"a professional email writing assistant" or
"an HR policy advisor"].

# CONTEXT
I work as a [your job title] at a [company type, e.g.,
"mid-sized Malaysian manufacturing company"].
My department handles [brief description of what
your team does].
I typically use Copilot for: [list 3 to 5 tasks, e.g.,
"drafting emails, summarising reports, preparing
presentations"].

# OUTPUT STYLE
- [Tone: e.g., formal / professional / conversational]
- [Format preference: e.g., bullet points / short
  paragraphs / tables]
- [Length preference: e.g., concise under 200 words /
  detailed with examples]

# CONSTRAINTS
- [List anything Copilot should avoid, e.g.,
  "avoid jargon", "do not use bullet points",
  "always write in Bahasa Malaysia"]
```

Tip: You do not need all sections every time. Even a ROLE and CONTEXT block will noticeably improve responses. Start simple and add more detail as you discover what works for you.

Exercise 7 - Compare Think Deeper vs Quick Response

Where: Start a new chat
Grounding: Web
Model: Auto, then repeat with Think Deeper

```
List 5 tasks I do every day at work that Microsoft 365
Copilot could help with. For each one, describe exactly
how Copilot would help and estimate the time saved
per week.
```

Run it first in **Quick Response** mode, then switch to **Think Deeper** and run the same prompt again. Compare the depth, structure, and specificity of each response.

Note: Think Deeper takes longer to respond but reasons through the problem more carefully before answering. Use it when you need a more considered output, not for quick lookups.

Exercise 8 - Your first prompt and checking sources

Where: Start a new chat
Grounding: Work IQ on if you have Premium, otherwise web
Model: Auto

```
EV adoption in Malaysia
```

When the answer comes back, find a grey source label at the end of a sentence, hover over it, and open at least one source. Does the source actually say what Copilot claims? Compare your answer with your neighbour's and note what differs.

Exercise 9 - Bare prompt vs GCSE prompt

Where: Start a new chat for each prompt
Grounding: Web
Model: Auto

Run the bare prompt first:

```
Create a report on EV adoption in Malaysia
```

Then run the full GCSE version of the AI guideline prompt:

```
Goal: Create an AI usage guideline manual for our workplace.

Context: Our organisation is introducing Microsoft 365 Copilot
across departments and needs a clear, practical policy so staff
use AI responsibly. Employees have mixed levels of AI experience,
and leadership wants to protect confidential data while
encouraging adoption.

Source: Base it on Microsoft's Responsible AI principles,
Malaysia's Personal Data Protection Act (PDPA 2010), and any
existing IT security or data protection policies in our
organisation.

Expectations: Cover acceptable and unacceptable uses, data
privacy and confidentiality, human review of AI output, roles
and responsibilities, and practical do's and don'ts for
everyday tasks, with examples relevant to our work and a short
FAQ. Write it as a clear, professional manual for non-technical
staff, organised with headings and short sections, in plain
language, with a one-page summary at the front that people can
read in two minutes.
```

Once you are happy with the GCSE answer, hover over the prompt, click **Save prompt** (the bookmark icon), and title it *AI Guideline*. Then open a new chat, click the ellipsis (**...**) under the message box, choose **Prompt Lab**, and find it under **Your saved prompts**.

Exercise 10 - Work IQ on vs off

Where: Start a new chat for each run
Grounding: Work IQ on, then off
Model: Auto

Run your saved *AI Guideline* prompt from Prompt Lab with Work IQ on, then again with it switched off (the button shows struck through). Compare the sources each answer cites.

> **Note:** Work IQ is Premium only. Basic users can skip to Exercise 11, which grounds Copilot by uploading a file instead.

Exercise 11 - Ground Copilot in a file you upload

Where: Start a new chat
Grounding: Uploaded file
Model: Auto

Click **+**, choose **Upload images and files**, and upload Data_Privacy_AI_Acceptable_Use_Policy.pdf (or your own sample guideline). Then ask:

```
Summarise the key principles in this guideline and list
what end users must do.
```

Next, start another new chat, type `/` followed by part of the file name, select the file from the picker, and ask:

```
What does this policy say about entering customer data
into AI tools? Quote the relevant section.
```

> **Tip:** before uploading the same file again, check the **Microsoft Copilot Chat Files** folder in OneDrive. If it is already there, use **Attach cloud files** instead.

02

CHAPTER 2

Prompt Engineering

The quality of what Copilot gives you depends almost entirely on what you give it. This topic covers how to write prompts that get useful, relevant, and accurate results.

The GCSE Framework

A simple four-part framework for structuring effective prompts. You do not need all four elements every time, but the more relevant context you provide, the better the output.

Element	What it means	Example
G — Goal	What do you want Copilot to do?	"Write a summary..."
C — Context	Who are you, what's the situation?	"...for a team of non-technical staff..."
S — Source	What should it reference or use?	"...based on the attached report..."
E — Expectations	Format, length, tone, style	"...in 3 bullet points, professional tone."

Building a GCSE prompt step by step

Here is how the same request improves as you add each element:

Goal only (weak):

```
Write a summary.
```

Goal + Context:

```
Write a summary for a team of non-technical staff.
```

Goal + Context + Source:

```
Write a summary for a team of non-technical staff based on the attached AI Usage Guideline document.
```

Goal + Context + Source + Expectations (strong):

```
Write a summary of the attached AI Usage Guideline for a team of non-technical staff.
Cover the 3 most important rules they need to follow. Use plain language,
bullet points, and keep it under 150 words.
```

The content request did not change — only the structure around it. That structure is what makes Copilot's response actually usable.

Weak Prompt vs. Strong Prompt

Example 1 — Writing an email

Weak:

```
Write me an email about the AI guideline.
```

Strong:

```
Write a professional email to my department head requesting approval
for a new AI Usage Guideline. The guideline was developed by my team
over the past two weeks and covers responsible AI use, dos and don'ts,
and recommended tools. Keep it under 150 words and use a formal but
approachable tone.
```

Example 2 — Summarising a document

Weak:

```
Summarise this document.
```

Strong:

```
Summarise this AI Usage Guideline in 5 key points. Focus on the
practical dos and don'ts. Write it so a team member with no AI
background can understand it quickly.
```

Example 3 — Analysing data

Weak:

```
What does this data show?
```

Strong:

```
I have survey responses from 30 staff members about how they have been
using AI tools over the past month. Analyse this data and highlight the
top 3 trends, any concerns raised, and recommend one action based on
the findings.
```

Example 4 — Preparing for a meeting

Weak:

```
Help me prepare for my meeting.
```

Strong:

```
I have a 30-minute meeting tomorrow with my department head to present
the AI Usage Guideline for approval. Prepare 5 talking points I should
cover, 3 objections she might raise, and a suggested response for each
objection. My department head is detail-oriented and will focus on
compliance and risk.
```

Prompting Inside M365 Apps vs Copilot Chat

Prompting works slightly differently depending on where you are. Understanding this helps you get better results in each context.

Where	How Copilot receives your prompt	Best for
Copilot Chat	Open conversation — you provide all context in the chat	Research, drafting from scratch, multi-turn tasks, comparing outputs
Copilot in Word	Has access to the open document — reference it with /	Rewriting, summarising, reformatting existing content
Copilot in Outlook	Sees the email thread you have open	Drafting replies, summarising threads, adjusting tone
Copilot in Excel	Reads the active table or data range	Analysing data, creating charts, writing formulas
Copilot in PowerPoint	Can reference a Word document via "Create from file"	Building slide decks from existing documents

Key difference: In Copilot Chat you need to provide all the context yourself. In M365 apps, Copilot already has the open document or data as context — so your prompt can be shorter and more direct.

Example — same task, different location:

In Copilot Chat:

```
I have an AI Usage Guideline document. It has 7 sections including an
introduction, approved tools, dos and don'ts, and a data privacy section.
Suggest 3 ways I could make the Dos and Don'ts section clearer for
non-technical readers.
```

In Copilot in Word (with the document already open):

```
Suggest 3 ways to make the Dos and Don'ts section clearer for
non-technical readers.
```

Same outcome — but in Word, Copilot already sees the document so you do not need to describe it.

Iteration: Working With Copilot's First Response

The first response is rarely the final response. Copilot holds the full conversation in context, so you can refine without starting over.

A typical iteration flow

Round 1 — Get a first draft:

```
Draft an introduction for an AI Usage Guideline. Audience: non-technical
corporate staff. Tone: professional but approachable. Length: 2 short paragraphs.
```

Round 2 — Adjust what is not right:

```
Good, but the second paragraph sounds too formal. Rewrite it to be warmer
and more encouraging — staff should feel this is a helpful resource,
not a compliance document.
```

Round 3 — Fine-tune:

```
Shorten the whole thing to under 80 words without losing the key message.
```

Round 4 — Sanity check:

```
Does this introduction clearly tell the reader what the guideline is for
and why it matters? What is missing?
```

Each follow-up builds on what Copilot already produced. You are editing collaboratively, not starting from scratch each time.

Common Mistakes to Avoid

Being too vague about the output format.
If you do not specify a format, Copilot will choose one — and it may not be what you wanted. Always state: table, bullet points, numbered list, paragraph, or a word count.

Giving Copilot too much to do in one prompt.
"Write a full proposal, including an executive summary, risk analysis, implementation plan, and budget" will produce shallow content across all sections. Break big tasks into separate prompts and refine each part.

Accepting the first response without reviewing.
Copilot can sound confident even when it is wrong. Read the output critically — especially any facts, figures, names, or dates it generated.

Not giving Copilot a role or perspective.
"Summarise this" and "Summarise this as a busy senior manager who wants only the most critical points" produce very different outputs. Giving Copilot a perspective sharpens the response.

Restarting instead of iterating.
If the response is 80% right, do not delete it and start again. Tell Copilot exactly what to fix: "Keep the structure but rewrite the third paragraph to be more concise."

Pasting sensitive data.
Never paste employee names, IC numbers, salary figures, client contracts, or personal details into a prompt — even in a work Copilot session. When in doubt, anonymise before pasting.

Practical Tips

Be specific about the output format. If you want a table, say "in a table". If you want bullet points, say so. If you want it short, give a word count.

Tell Copilot who it's writing for. "Write this for a non-technical audience" gives very different results from "write this for senior management."

Use "Act as" to shift perspective. Tell Copilot to adopt a role: "Act as an HR manager reviewing this policy." This changes how it frames the response — useful for anticipating objections or getting feedback from a different angle.

Ask Copilot to explain its reasoning. If you want to understand why Copilot structured something a certain way, ask: "Why did you structure it this way?" or "What assumptions did you make?" This builds your understanding and helps you write better prompts next time.

Use follow-up questions to go deeper. After any response, try: "What did you leave out?", "What are the risks of this approach?", or "Give me an alternative version."

Prompts to Try Right Now

```
Explain the difference between Microsoft Copilot (free) and
Microsoft 365 Copilot (paid) in simple terms. Use a comparison
table with 4 key differences.
```

```
I am a trainer delivering a 2-day Microsoft 365 Copilot workshop
to corporate employees in Malaysia. Suggest 5 real-world scenarios
where Copilot in Outlook would save significant time.
```

```
Act as a sceptical employee who is unsure about using AI at work.
List 5 concerns you might have, then provide a brief reassurance
for each one from an employer's perspective.
```

HANDS-ON

Hands-on exercises

Practice writing better prompts using the **GCSE framework** (Goal, Context, Source, Expectations).

Part 1 — Building a GCSE prompt

Work through these in order. Each step adds one more element to the same prompt and you will see the output improve at each stage.

Step 1 — Goal only. Submit this and note the response:

```
Write a summary.
```

Step 2 — Add Context. Submit and compare:

```
Write a summary for a team of non-technical staff.
```

Step 3 — Add Source. Submit and compare:

```
Write a summary for a team of non-technical staff based on
the AI Usage Guideline we have been working on in this workshop.
```

Step 4 — Add Expectations. Submit and compare:

```
Write a summary of our AI Usage Guideline for a team of non-technical staff.
Cover the 3 most important rules they need to follow.
Use plain language, bullet points, and keep it under 150 words.
```

After all four rounds, ask:

```
Compare the four summaries you just produced. Which one is most useful
and why? What specifically made the difference?
```

Part 2 — Rewriting weak prompts

Read each weak prompt, identify what is missing from GCSE, then rewrite it before submitting.

Weak:

```
Write me something about AI.
```

Weak:

```
Summarise this.
```

Weak:

```
Help me with my email.
```

Weak:

```
Give me ideas.
```

Weak:

```
Make this better.
```

After rewriting each one, submit both versions — the weak and your improved version — and compare the outputs side by side.

Part 3 — GCSE framework practice

These are fully built prompts using the GCSE framework. Submit them as-is first, then try modifying one element at a time to see how the output changes.

```
I am an HR manager at a 200-person Malaysian manufacturing company.
Write a short internal announcement (under 120 words) informing staff
that the company has adopted Microsoft 365 Copilot and will be rolling
out training next month. Tone: reassuring and positive.
```

```
Act as a sceptical finance director reviewing a new AI Usage Guideline
for a Malaysian company. List 5 specific questions or concerns you would
raise before approving it. Focus on financial risk, data security, and
employee liability. Be practical, not theoretical.
```

```
I need to explain to a non-technical colleague what "prompt engineering"
means. Write a 3-sentence explanation using an analogy from everyday
life in Malaysia. Avoid technical jargon entirely.
```

```
I am preparing a 30-minute lunch-and-learn session on Microsoft 365
Copilot for a team of 15 people in a logistics company. They have
never used AI tools before. Write a session outline with 4 segments,
including a hands-on activity. Keep the tone light and practical.
```

Part 4 — Iteration practice

This exercise runs as a single conversation. Do not start a new chat between rounds.

Round 1 — Get a first draft:

```
Write a short policy statement on the responsible use of AI at work.
Audience: all staff. Length: 3 short paragraphs.
```

Round 2 — Localise it:

```
Make it more specific to Malaysian workplace culture.
Add a reference to the PDPA (Personal Data Protection Act 2010).
```

Round 3 — Shorten it:

```
Shorten it to under 80 words and make it suitable for a
company intranet homepage. Keep the PDPA reference.
```

Round 4 — Add a perspective:

```
Now rewrite the same statement from the perspective of an employee
reading it for the first time. What might feel unclear or concerning?
Suggest 2 improvements based on that perspective.
```

Round 5 — Final check:

```
Review the final version of the policy statement. What is missing
that a complete AI usage policy should cover? List up to 3 gaps.
```

Part 5 — Format control

These exercises focus specifically on controlling output format. Submit each prompt and observe how specifying format changes what you get.

```
List 5 benefits of using Copilot in Outlook. Give the output in
3 different formats:
1. Bullet points only
2. A numbered list with one-line explanations
3. A table with "Benefit" and "Estimated Time Saved Per Week" columns
```

```
Explain how Microsoft 365 Copilot uses RAG (Retrieval-Augmented
Generation) to access company data. Give me 3 versions:
1. A 2-sentence plain language summary for a non-technical employee
2. A 5-bullet technical explanation for an IT team
3. A one-line version suitable for a slide title
```

```
Describe the difference between Copilot Chat and Copilot inside
Word. Format the response as a comparison table with 4 rows covering:
where you access it, what context it has, best use cases, and
one limitation.
```

Part 6 — Role and perspective

Using "Act as" shifts how Copilot frames its response. These exercises show how the same request produces different outputs depending on the perspective you give.

Submit this base prompt first:

```
Review this sentence from an AI Usage Guideline: "Staff may use any
AI tool of their choice for work tasks as long as it improves
productivity." What are the problems with this statement?
```

Then submit it again with each of these roles prepended, one at a time:

```
Act as a cautious IT security officer. Review this sentence from an
AI Usage Guideline and flag any security risks: "Staff may use any
AI tool of their choice for work tasks as long as it improves
productivity."
```

```
Act as a legal advisor specialising in Malaysian data protection law.
Review this sentence from an AI Usage Guideline and flag any
compliance risks: "Staff may use any AI tool of their choice for
work tasks as long as it improves productivity."
```

```
Act as a pragmatic operations manager who wants to roll out AI tools
quickly. Review this sentence and explain why it is actually fine as
a starting point, with one suggested improvement.
```

Compare the three responses. Notice how the same sentence gets framed very differently depending on who Copilot is "acting as."

Part 7 — Prompting inside M365 apps

These prompts are designed for use inside specific M365 apps, not Copilot Chat. The context is shorter because the app already provides the document or data.

In Copilot in Word (with a document open):

```
Summarise this document in 5 bullet points for a senior manager
who has 2 minutes to read it.
```

```
Rewrite the introduction to be more engaging. The reader should
want to keep reading after the first paragraph.
```

```
What sections of this document are unclear or could cause
confusion for a non-technical reader? List them with a
suggested fix for each.
```

In Copilot in Outlook (with an email thread open):

```
Summarise this thread. What has been agreed, what is still
unresolved, and what action is needed from me?
```

```
Draft a reply acknowledging the feedback and confirming I will
make the requested changes by end of this week.
```

In Copilot in Excel (with a data table selected):

```
What are the top 3 insights from this data?
Highlight anything that stands out as unusual.
```

```
Create a bar chart showing the distribution of responses
in the Productivity Rating column.
```

Part 8 — Stress testing your prompts

Once you have a prompt that works, push it further. These follow-up questions help you get more out of any response.

After any Copilot response, try:

```
What did you leave out that might be relevant?
```

```
What assumptions did you make when writing this?
```

```
Give me an alternative version with a completely different structure.
```

```
What are the weakest parts of this response and how would you improve them?
```

```
If a critical reader reviewed this, what objections might they raise?
```

03

CHAPTER 3

Copilot Chat

Copilot Chat is your starting point for research, brainstorming, and exploration. This is where you will begin the workshop's main project: building an AI Usage Guide for your department.

What is Copilot Chat?

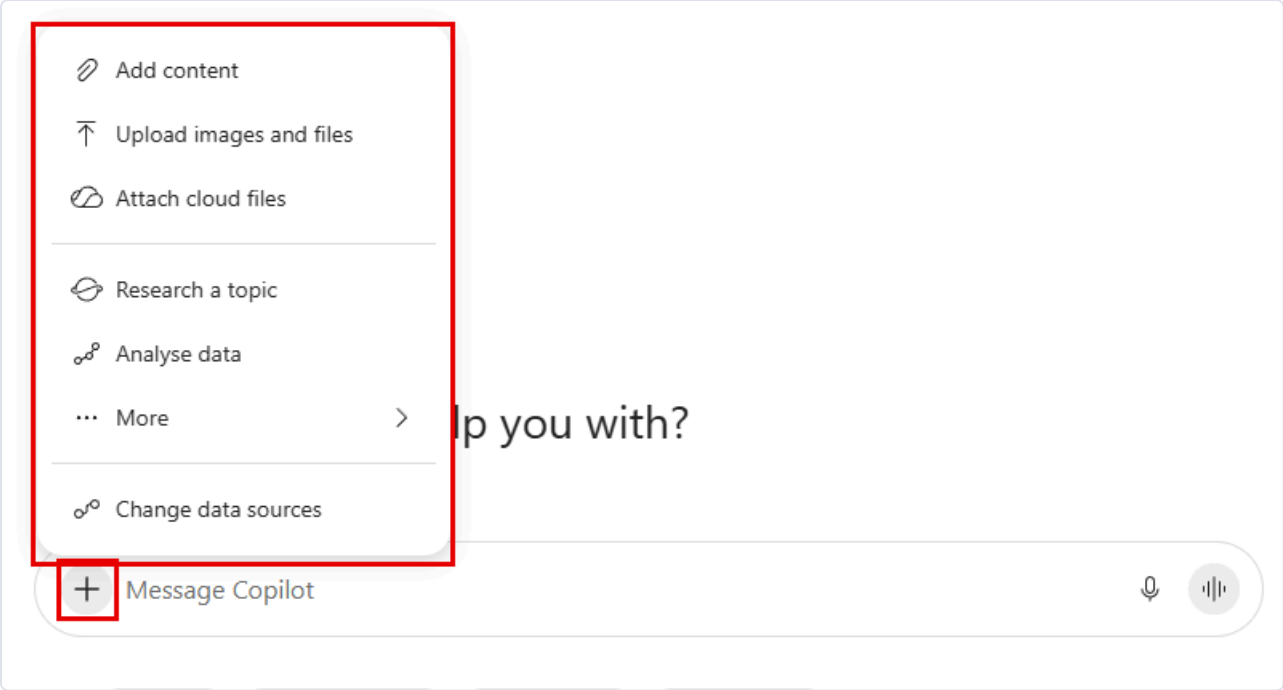
Copilot Chat is the conversational interface in Microsoft 365 Copilot. You access it at m365.cloud.microsoft or through the Copilot icon in Microsoft 365 apps. It can:

- Search the web for current information
- Reference your Microsoft 365 files, emails, and calendar (with an M365 Copilot licence)
- Use different AI models including GPT and Claude Opus
- Generate text, summarise documents, and help you think through problems

The Message Box — What Every Button Does

Before you start prompting, it helps to know what each control around the message box does.

The + button (Add content)



Click + to attach content or switch to a specialist agent

Option	What it does
Add content	Search and reference your M365 files, emails, meetings, or people directly in your prompt
Upload images and files	Attach a local file (PDF, Word, image) for Copilot to read and reference
Attach cloud files	Link a file from OneDrive or SharePoint
Research a topic / Analyse data	Hand the task to the Researcher or Analyst agent for deeper, specialist work
More	Further tools and agents available in your tenant
Change data sources	Choose which sources Copilot can use to ground its answer

Grounding — Work IQ on vs off



The Work IQ toggle (top left) controls where Copilot searches. When it is off, the label is struck through

Grounding is the process of connecting an AI's response to a specific, trusted source of information rather than relying on its general training data alone. When Copilot is grounded, it retrieves real content from a defined source before generating a response — this is what makes its answers relevant to your actual work context rather than generic.

Mode	What it searches
Work IQ on	Your Microsoft 365 data — emails, files, calendar, Teams messages, SharePoint — as well as the web
Work IQ off	The public internet only, via Bing

When to keep Work IQ on (Work mode):

- Finding information from your own company files or emails
- Summarising a document stored in SharePoint or OneDrive
- Asking about a meeting, a colleague, or a recent project
- Drafting content that references your organisation's actual context

When to turn Work IQ off (Web mode):

- Researching external topics, industry best practices, or current events
- Looking up regulations, guidelines, or public information
- Comparing your approach against what other organisations do
- Any task where you need information beyond what your company has

For the research phase of this workshop, turn **Work IQ off** (Web mode) to gather information about AI guidelines and best practices. Turn it back **on** (Work mode) when you want Copilot to reference your actual company documents.

> **Important:** When in Work mode, Copilot only accesses data you already have permission to see. It respects your Microsoft 365 permissions — it cannot read files or emails that you do not have access to.

Microsoft Graph — How Work Mode Knows Your Data

When Work IQ is on (Work mode), Copilot does not search your files the way Google searches the web. Instead, it uses **Microsoft Graph** — a unified API layer that sits across all your Microsoft 365 services.

Think of Microsoft Graph as a single connection point that links everything in your Microsoft 365 environment: your emails in Outlook, files in OneDrive and SharePoint, calendar events, Teams chats, contacts, and meeting transcripts. Rather than searching each service separately, Copilot queries Microsoft Graph once and gets a consolidated view of your work data.

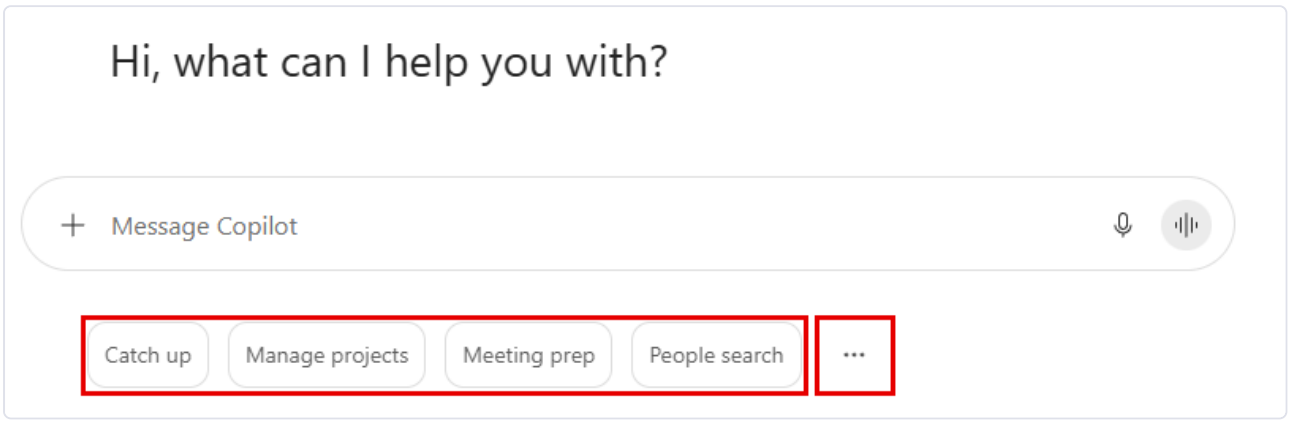
What this means in practice:

- When you ask "what did we discuss in last Tuesday's meeting?", Copilot queries Graph for your calendar and any associated Teams meeting transcript
- When you ask "find the Q1 report", Copilot queries Graph for files across OneDrive and SharePoint that you have access to

- When you ask "what emails have I received from the finance team this week?", Copilot queries Graph for your Outlook data

Why it matters for your AI Usage Guide:
Your AI Usage Guide should acknowledge that Copilot in Work mode can see a broad range of company data — and staff should understand this so they are thoughtful about what they discuss and store in Microsoft 365. It is not a risk to be alarmed about, but it is context worth including in any responsible AI guideline.

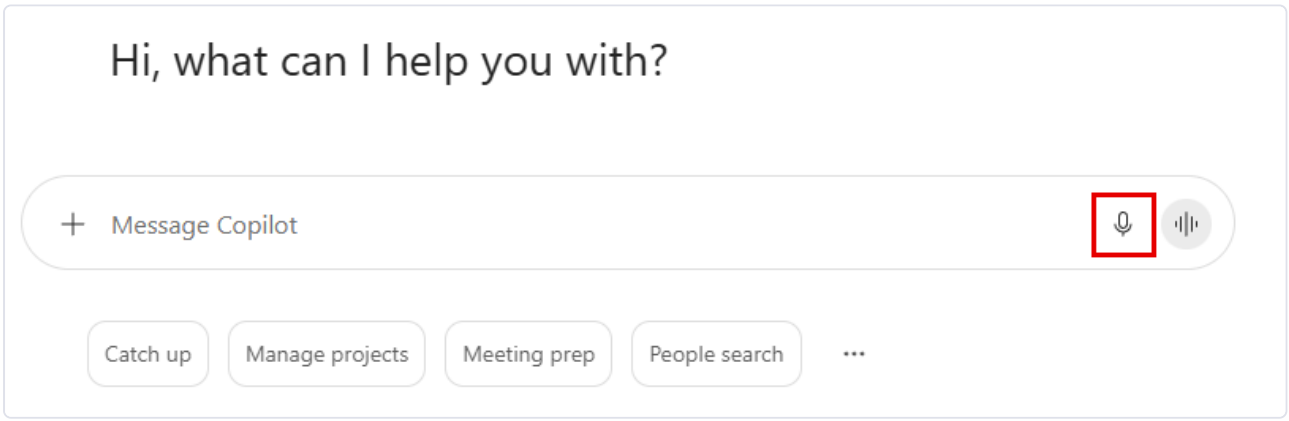
Suggestion chips and the Prompt Lab



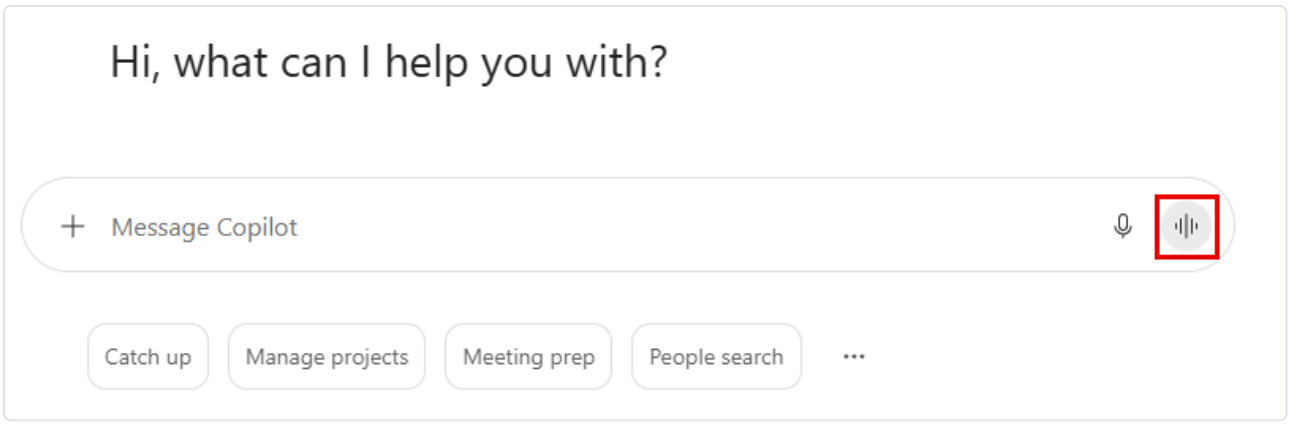
Suggestion chips below the message box. The ... button opens the Prompt Lab

The chips below the message box give you ready-made starting points. With Work IQ on you will see work tasks such as **Catch up**, **Manage projects**, **Meeting prep**, and **People search**; with Work IQ off they switch to general tasks such as **Learn**, **Find**, **Summarise**, and **Suggest**. Click **...** to open the full Prompt Lab.

Voice input



Microphone button — speak your prompt instead of typing



Sound wave button — have a full voice conversation with Copilot

The **microphone** transcribes your speech into text in the message box. The **sound wave** icon starts a live voice conversation where Copilot responds out loud — useful for hands-free brainstorming.

Prompt Controls and Output Controls

After you submit a prompt and receive a response, two sets of controls appear.

Prompt controls (on your message)



Hover over your submitted prompt to see: edit, copy, schedule, and save

#	Button	What it does
1	**Edit**	Edit your prompt and resubmit without retyping
2	**Copy**	Copy your prompt text
3	**Schedule this prompt**	Run the prompt automatically on a schedule (for example, every Monday morning)
4	**Save prompt**	Save the prompt to *Your saved prompts* in the Prompt Lab

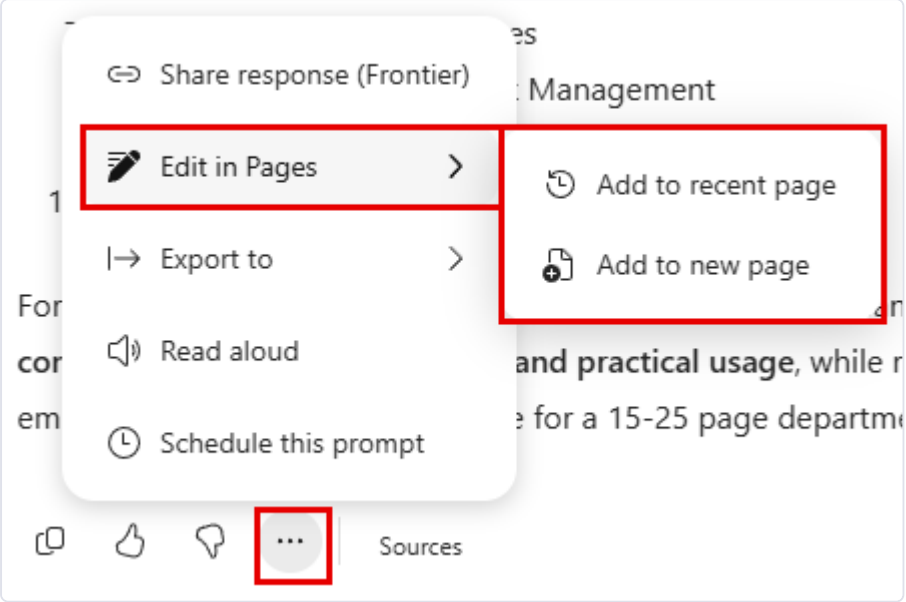
Output controls (on Copilot's response)



Controls on Copilot's response: copy, thumbs up, thumbs down, more options, and sources

#	Button	What it does
1	**Copy**	Copy the full response to clipboard
2	**Thumbs up**	Mark the response as helpful (improves suggestions)
3	**Thumbs down**	Flag a response that missed the mark and say why
4	**More options (...)**	Share response, Edit in Pages, Export to Word, Read aloud, and Schedule this prompt
5	**Sources**	See the web pages or work files Copilot used to ground the answer

Edit in Pages

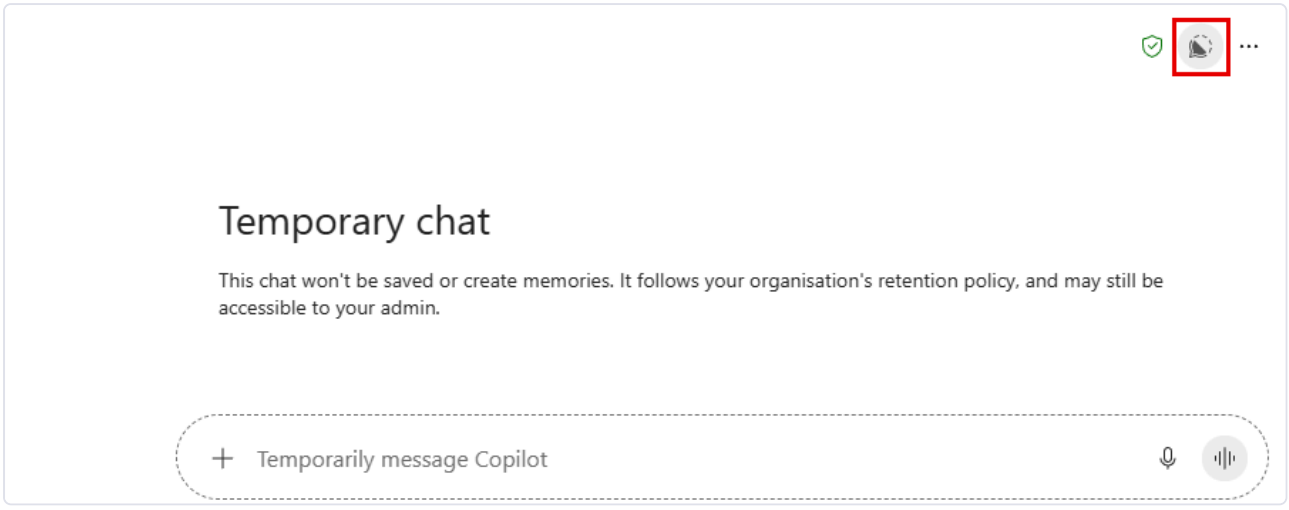


More options (...) → Edit in Pages → Add to new page (or Add to recent page)

Edit in Pages (in the **...** menu under a response) opens the response as an editable Copilot Page — a live collaborative document you can continue working on. Choose **Add to new page** to start a fresh page, or **Add to recent page** to append to one you already have. This is how you move from research in Copilot Chat into the drafting phase in Topic 04.

Other Features Worth Knowing

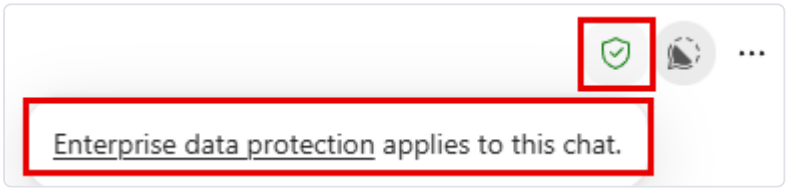
Temporary chat



Temporary chat — this conversation will not be saved to your history

Click the **Temporary chat** icon (speech bubble, top right) to start a session that is not saved to your chat history and does not create memories. Useful when you want to experiment without it appearing in your recent chats. It still follows your organisation's retention policy.

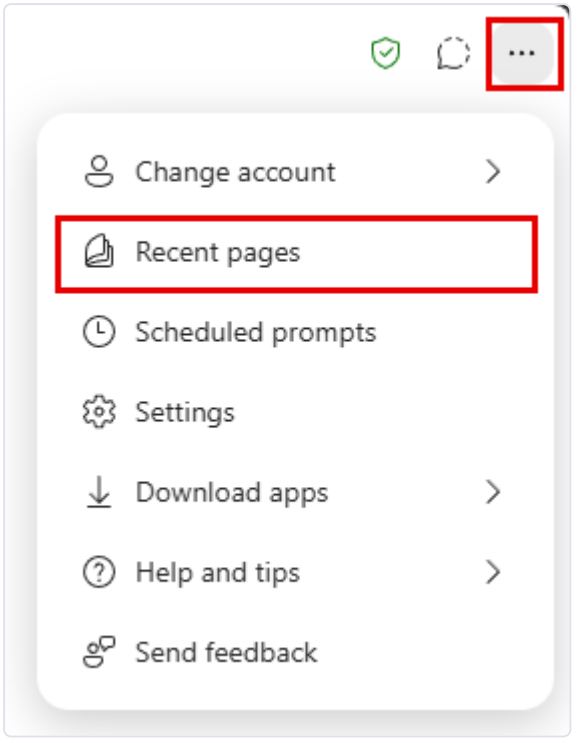
Privacy and compliance indicator



Hover over the green shield to see "Enterprise data protection applies to this chat"

The green shield icon in the top bar indicates that your conversation is protected under your organisation's Microsoft 365 compliance and data governance policies — it is not used to train Microsoft's AI models.

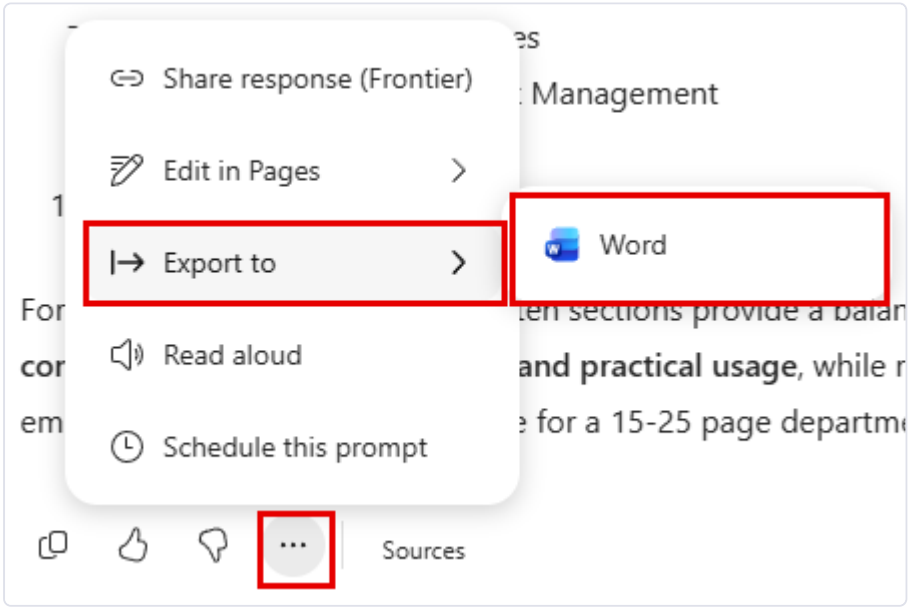
Recent pages



Access your recent Copilot Pages from the ... menu (top right)

The **...** menu (top top right) gives you access to Recent pages, Scheduled prompts, Settings, Download apps, Help and tips, and Send feedback.

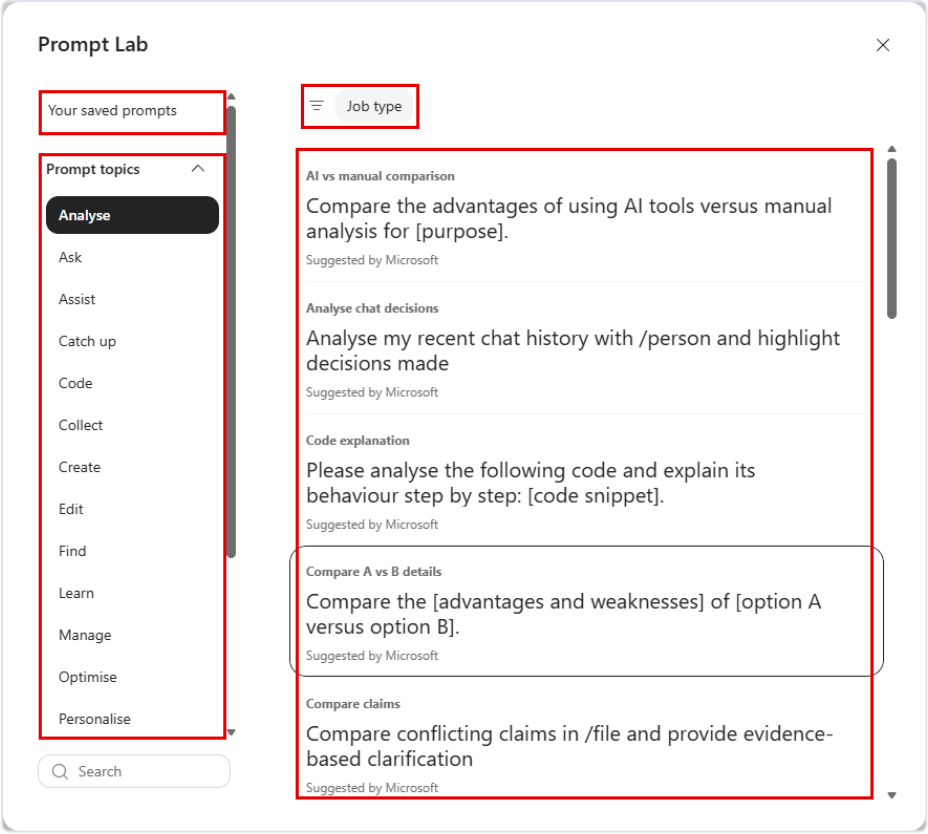
Export to — save a response as a Word document



More options (...) → Export to → Word

Export to (in the **...** menu under a response) saves the response directly as a Word document — useful when you want to take your research notes out of Copilot Chat.

The Prompt Lab



The Copilot Prompt Lab — your saved prompts, prompt topics, a Job type filter, and Microsoft-suggested prompts

The Prompt Lab (formerly the Prompt Gallery) is a built-in library of Microsoft-suggested prompts, organised by topic and job type. You can also save your own prompts here using the **Save prompt** (bookmark) icon on any prompt you submit — they appear under **Your saved prompts**. Open it with the **...** button next to the suggestion chips below the message box.

Switching Models in Copilot Chat

Click the **Auto** button at the top left (next to Work IQ) to switch between AI models.

Model	Best for
Auto	General use — Copilot decides the best approach based on your prompt
Quick response	Fast, concise answers when you do not need deep analysis
Think deeper	Complex reasoning, longer analysis, nuanced tasks
Advanced reasoning (Experimental)	The most complex, multi-step tasks
Claude	Writing, analysis, and nuanced reasoning — by Anthropic. Choose Sonnet or Opus

GPT	General tasks — by OpenAI. Expand to choose a specific version

> **Workshop exercise:** Try the same research prompt in both Opus and GPT. Compare tone, depth, and structure. Which output would you use as a starting point for your AI Usage Guide?

Workshop Scenario: Research Phase

Your task is to research and draft an **AI Usage Guide for your department**. This guide will help your team understand how to use AI tools responsibly and effectively at work.

Turn **Work IQ off** (Web mode) for this phase so Copilot can pull current information from the internet. Turn it back on later when you want to reference your own company documents.

See prompts.md for the full set of research prompts to use in this phase.

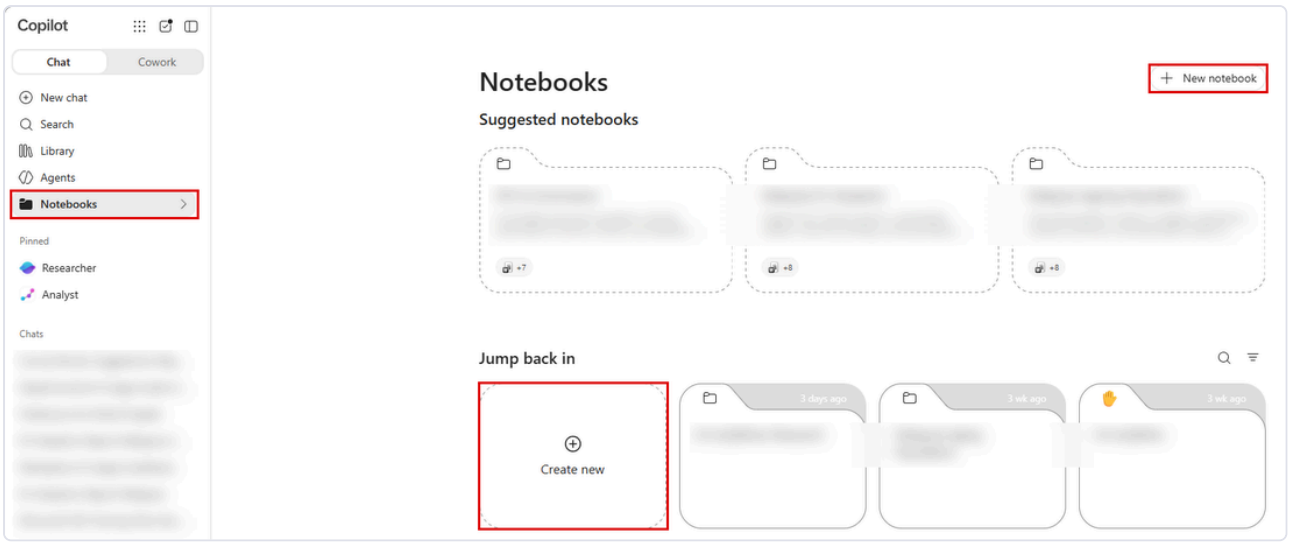
Copilot Notebooks — Keep Your Research in One Place

A single chat is fine for one sitting, but research for a guide like this happens over several days and pulls in files, emails and meetings. A **Copilot Notebook** keeps all of that together. You add the chats, files and notes for one project, and Copilot uses everything in the notebook to answer your questions, so you do not have to re-explain the project or re-attach the same files each time.

Chat	Notebook
One conversation	Many chats, files and notes for one project
You attach files to each prompt	References stay attached to the notebook
Context is lost when you start a new chat	Copilot remembers the project's context across sessions
Good for a quick question	Good for work that runs over days or weeks

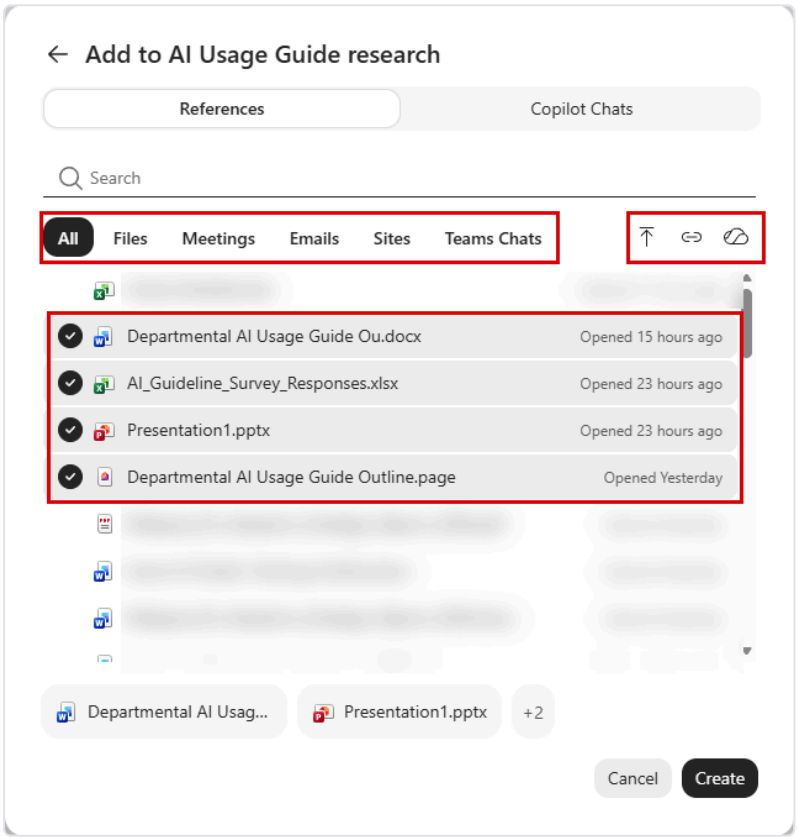
Create a notebook

1. In the Copilot sidebar, select **Notebooks**. The Notebooks page opens, with your existing notebooks under **Jump back in**.
2. Select **New notebook** (top right) or the **Create new** card, give the notebook a name, for example *AI Usage Guide research*, and select **Next**.



Select Notebooks in the sidebar, then New notebook or Create new.

3. In the **Add to** dialog, stay on the **References** tab and tick the material you want Copilot to work from. Copilot lists your recent files, and you can filter by **Files**, **Meetings**, **Emails**, **Sites** or **Teams Chats**. Select **Create** when you are done.



The References tab, with the filter tabs, the Upload files, Link and OneDrive files buttons, and the workshop files selected.

You can add more references later with **Add references** in the notebook's **Content** pane on the right.

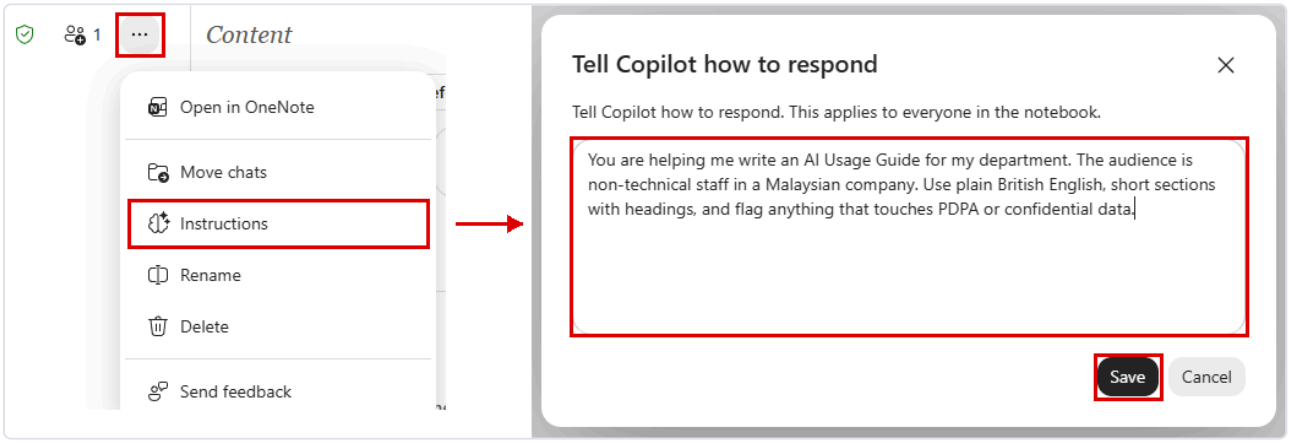
Ways to add references

Method	How
Suggestions	Tick files, meetings, emails, sites or Teams chats from the list Copilot shows
Upload files	Select the upload icon and choose a file from your computer
OneDrive files	Select the cloud icon, find the file, then add it
Link	Select the link icon and paste a link to a file or page
Move a chat	From the sidebar, open a chat's **...** menu and choose **Move to notebook**, or use the **Copilot Chats** tab when adding content

Notebooks accept Word, PowerPoint, Excel and PDF files, Loop components, Copilot Pages and OneNote pages, as well as Outlook emails.

Give the notebook instructions

Open the notebook's **...** menu (top right) and select **Instructions** to tell Copilot how to behave in this notebook only, for example the audience you are writing for, or a format to follow. Type them into **Tell Copilot how to respond** and select **Save**. This works like the custom instructions you set in Topic 01, but only for this project, and the instructions apply to everyone you share the notebook with.



The notebook's ... menu, then Instructions, with sample instructions entered.

> **License note:** Copilot Notebooks need a Microsoft 365 Copilot (Premium) license, and Microsoft is rolling them out to Copilot Chat (Basic) users through 2026. If you do not see Notebooks in your sidebar yet, keep working in a single chat for this topic.

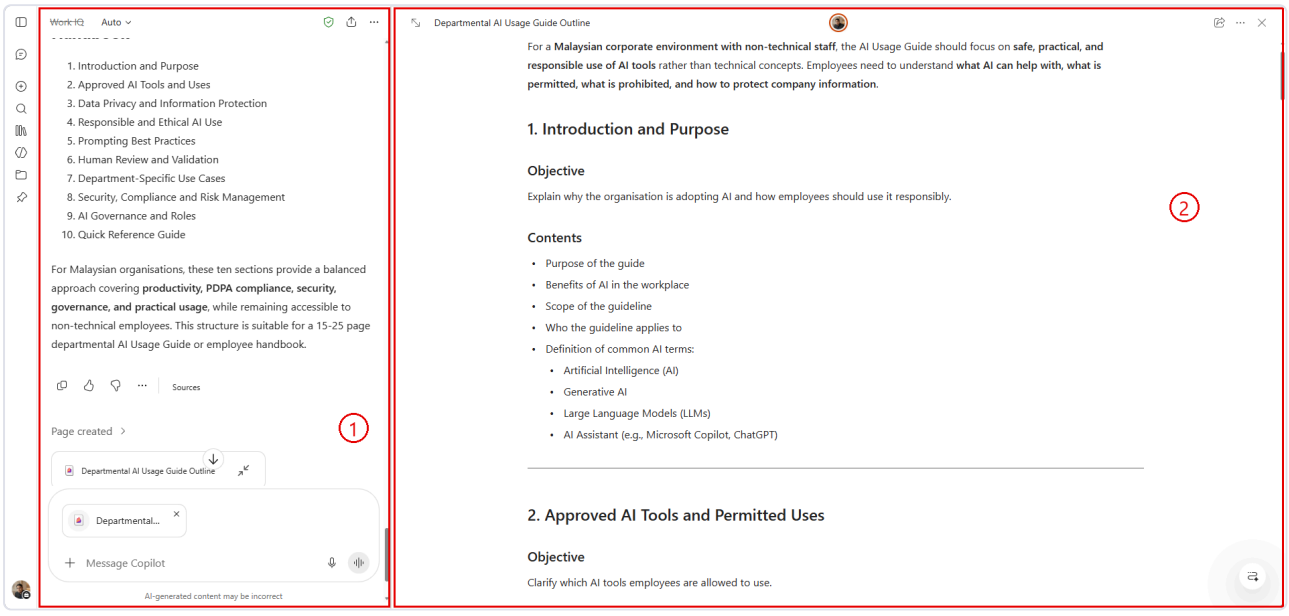
> **Try it:** create a notebook called *AI Usage Guide research*, move your research chat into it, add the Data_Privacy_AI_Acceptable_Use_Policy.pdf as a reference, then run Part 9 of the prompts.

Copilot Pages — The Link to Topic 04

Once you have useful research in Copilot Chat, you have two ways to move it into a document:

Option 1 — Edit in Pages: Click **...** under any response → **Edit in Pages** → **Add to new page** to open it as a live Copilot Page for collaborative editing.

Option 2 — Export to Word: Click **...** under the response → **Export to** → **Word**.



A Copilot Page in action — the chat continues on the left, the editable document on the right

Topic 04 covers Copilot Pages in detail. The research you build here is the raw material you will shape into your AI Usage Guide draft there.

Tips for Research in Copilot Chat

- Start broad, then narrow. Get a high-level overview first, then use follow-up prompts to go deeper on specific sections.
- Stay in the same conversation rather than starting new chats — Copilot builds on earlier context and your research stays connected.
- If Copilot cites sources in Web mode, check them. Live search results are usually accurate but not always — verify anything you plan to include in your guide.
- Save prompts that work well using the bookmark icon so you can reuse them in future sessions.
- Use the **Edit** button on your prompts to refine and resubmit without retyping from scratch.
- When you have enough research, use the consolidation prompt in prompts.md to turn your notes into a structured outline before moving to Pages.

HANDS-ON

Hands-on exercises

Use these prompts to research your **AI Usage Guide** for your department.

> **Grounding modes explained:**
>
> - **Web mode (Work IQ off):** Click **Work IQ** at the top left so the label is struck through. Copilot searches the public internet only. Use this for Parts 1 to 5 to research best practices, regulations, and external information.
> - **Work mode (Work IQ on):** The default. Copilot searches your Microsoft 365 data (OneDrive, SharePoint, emails, Teams). Use this for Part 6 only, after uploading the sample policy document.
>
> **Session guide:** Parts 1 through 5 and Part 8 run in the **same chat session** using Web mode. Part 6 is a new chat in Work mode. Part 7 is flexible.

Part 1 — Broad overview

Session: same chat | Grounding: Web mode

Start here to get a high-level picture before going into department-specific detail.

```
What should a departmental AI usage guide cover? Give me a
structured outline with at least 6 sections. The guide is for
a Malaysian corporate environment with non-technical staff.
```

```
What are the most common risks organisations face when employees
use AI tools without clear guidelines? List them with a brief
explanation of each.
```

```
What are global best practices for responsible AI use in the
workplace? Summarise the key principles in plain language,
with one example of how each applies in an office setting.
```

Then go deeper on anything that stands out:

```
Expand on [paste the point you want to explore]. Give me 2 real-world
examples of how this has affected organisations, and what they did
about it.
```

Part 2 — Department-specific research

Session: same chat | Grounding: Web mode

Replace `[your department]` with your actual department before submitting.

```
I work in [your department] at a mid-sized Malaysian company.
What are the 5 most relevant AI use cases for my department?
Be specific, not generic advice. For each use case, name the
Microsoft 365 Copilot feature that would handle it.
```

```
What are the most important dos and don'ts for using AI in
[your department]? Focus on data privacy, accuracy, and
professional ethics. Give me a table with two columns:
Do and Don't.
```

```
What data or information from [your department] should never
be shared with an external AI tool? Give me a list with the
reason for each item. Reference PDPA where relevant.
```

```
What are 3 tasks in [your department] where AI output must
always be verified by a human before being used? Explain
the risk for each one if it is not checked.
```

Part 3 — Regulatory and compliance angle

Session: same chat | Grounding: Web mode

```
What Malaysian laws or regulations are relevant when a company
introduces AI tools in the workplace? Include PDPA 2010, any
labour regulations, and sector-specific rules if applicable
(e.g. banking under BNM guidelines, healthcare under MOH).
```

```
Act as a cautious legal advisor. What clauses or warnings
should be included in a company AI usage policy to protect
the organisation from liability? List them with a one-sentence
explanation of each.
```

```
How does Malaysia's National Guidelines on AI Governance and
Ethics (AIGE) apply to a company deploying Microsoft 365 Copilot
for its staff? Summarise the key requirements in plain language.
```

Part 4 — Exploring different perspectives

Session: same chat | Grounding: Web mode

Run all three prompts and compare the responses. The employee perspective is often the most useful one for writing a guide that people will actually read.

```
Act as a cautious IT security officer at a Malaysian company.
Review a situation where staff are starting to use Microsoft 365
Copilot without formal guidelines. What are your top 5 concerns
and what would you want the AI usage guide to address?
```

```
Act as an enthusiastic department head who wants their team to
adopt AI tools quickly. Make the case for why every department
in a Malaysian company should have an AI usage guide, and why
having one actually accelerates adoption rather than slowing it down.
```

```
Act as a frontline employee who is nervous about using AI at work.
What questions would you want the AI usage guide to answer before
you felt comfortable using Copilot for your daily tasks?
```

Part 5 — Multi-model comparison

Session: same chat | Grounding: Web mode | Switch models using the Auto dropdown

Run the same prompt in Opus and GPT and compare the outputs.

```
Write a one-paragraph introduction for an AI Usage Guide
aimed at employees who are new to using AI at work.
Tone: professional but encouraging. Max 80 words.
```

After comparing, ask yourself:

- Which version is more suitable for your workplace culture?
- Which is clearer and easier to read?
- Which would you edit less before using?

Then try the same comparison with a more analytical prompt:

```
What are the 3 most important things a Malaysian company must
address in an AI usage policy? Rank them by business risk,
highest first. Give a one-paragraph justification for each.
```

Notice whether the models differ more on creative writing tasks or analytical ones.

Part 6 — Work mode: referencing your own documents

Session: new chat | Grounding: Work mode (Work IQ on)

> **Download:** Data_Privacy_AI_Acceptable_Use_Policy.pdf before you start this part.

Before you start this part:

1. Download the file above
2. Upload it to your **OneDrive** (drag and drop into any folder)
3. Wait about 30 seconds for Microsoft Graph to index it
4. Open a new Copilot Chat and switch to **Work mode** (make sure **Work IQ** at the top left is on — not struck through)
5. You are now ready to submit the prompts below

Copilot will search your Microsoft 365 data including the document you just uploaded. This simulates how you would use Work mode to reference your own company policies.

```
Do we have any existing policies or guidelines related to data
privacy or acceptable use of AI tools? Summarise the key points.
```

```
Based on our existing data privacy and AI policy, what gaps would
need to be addressed before we could safely roll out Microsoft 365
Copilot to all staff? List the gaps and suggest how each could
be addressed.
```

```
Our policy references PDPA 2010 and the AIGE guidelines.
Summarise what each of these requires from us as an employer,
based on what you can find in our policy document.
```

```
Which sections of our existing policy cover employee
responsibilities when using AI tools? Quote the key obligations
in plain language that a non-technical employee would understand.
```

If Copilot cannot find the document: make sure you are in Work mode (Work IQ on, not struck through). If it still cannot find it, wait another minute and try again. Microsoft Graph indexing can take a few minutes for new files.

Part 7 — Fact-checking and pressure-testing

Session: any session | Grounding: Web mode

Once you have research notes, use these to verify and challenge what Copilot gave you.

```
You told me earlier that [paste a specific claim]. What is
the source for this? How confident are you in this information
and what should I verify independently?
```

```
Review the research notes we have built in this conversation.
Which points are likely to be accurate and stable, and which
ones should I verify with a current source before including
them in a formal document?
```

```
What did you leave out of this research that a thorough AI
usage guide for a Malaysian company should cover?
```

Part 8 — Consolidation: preparing to move to Pages

Session: same chat as Parts 1 through 5 | Grounding: Web mode

This turns everything you have gathered into a structured outline ready to take into Copilot Pages in Topic 04.

```
Based on everything we have discussed in this conversation,
give me a structured set of notes I can use to write an AI
Usage Guide for my department. Organise by section with a
heading for each. Under each heading, use bullet points for
the key ideas. Include a note on any areas where I still
need to do more research.
```

Once you have the outline, click **...** under the response → **Edit in Pages** → **Add to new page** to open it as a Copilot Page. That is where Topic 04 begins.

Part 9 — Optional: gather your research in a Notebook

Session: a new Copilot Notebook | Needs: Notebooks in your sidebar (see the notes)

Create a notebook called *AI Usage Guide research*. Move your research chat from Parts 1 to 8 into it (chat **...** menu → **Move to notebook**) and add the Data_Privacy_AI_Acceptable_Use_Policy.pdf as a reference.

Then open the notebook's **...** menu (top right), select **Instructions**, paste the text below and select **Save**:

```
I am writing an AI Usage Guide for my department. My readers
are non-technical staff. Use plain language, keep answers
short, and always say which reference you used.
```

Now ask questions across everything in the notebook:

```
Compare my research notes with the attached Data Privacy and
AI Acceptable Use Policy. Where does the policy already cover
something my guide needs, and where are the gaps?
```

```
Using everything in this notebook, list the 5 rules every
employee must follow when using AI tools, and the reference
each rule comes from.
```

> **Tip:** come back to this notebook in Topics 04 and 05. Because the references stay attached, you can ask Copilot about your research at any point without re-uploading anything.

04

CHAPTER 4

Copilot Pages

Copilot Pages is where your research becomes a document. Think of it as a collaborative canvas — you pull content from Copilot Chat into a live page, edit it, refine it with Copilot, and share it with your team in real time.

Continuing from Topic 03

At the end of Topic 03 you ran the consolidation prompt (Part 8) which produced a structured outline of your research. That outline is your starting point here.

If you are still in the same Copilot Chat session:
Click **...** under the consolidation response → **Edit in Pages** → **Add to new page**. This opens your outline as a live Copilot Page. You are ready to start Topic 04.

If you closed the session or started a new chat:

1. Open a new Copilot Chat
2. Paste your research outline into the message box
3. Submit the Part 2 draft prompt from prompts.md
4. Click **Edit in Pages** on the response

If you did not complete Topic 03:
Go to prompts.md Part 2 and submit the draft prompt directly in Copilot Chat. It will generate a draft from scratch. Click **Edit in Pages** on the response and continue from there.

> **Important:** Once you are in Copilot Pages, do all your refining work there. Do not start a new Copilot Chat session for each prompt — use the Copilot panel inside the Page so all your edits stay in one document.

What is Copilot Pages?

Copilot Pages is built on **Microsoft Loop**. When you generate content in Copilot Chat, clicking **Edit in Pages** creates a Loop page that:

- Stays live and editable — you and teammates can edit simultaneously
- Syncs across Microsoft 365 — share it in Teams and people can edit it right there
- Can be exported to Word or PDF when you are done

- Saves automatically to your Microsoft 365 account

Pages vs Word

	Copilot Pages	Microsoft Word
Best for	Collaborative drafting and live editing	Final polished documents
Real-time co-editing	Yes	Yes, but less fluid
Copilot integration	Built-in panel	Built-in panel
Export options	Word, PDF, copy to clipboard	PDF and various formats
Feels like	A wiki or Notion page	A traditional document

Use Pages to build and refine your draft. Use Word for the final version you will submit for approval.

Workshop Scenario

Your research from Topic 03 is now in Copilot Pages as a structured outline. Your goal in this topic is to turn that outline into a proper first draft of the AI Usage Guide, refine it section by section using Copilot, add a visual decision flowchart using Mermaid, and export it to Word ready for Topic 05.

Creating a Mermaid Diagram in Pages

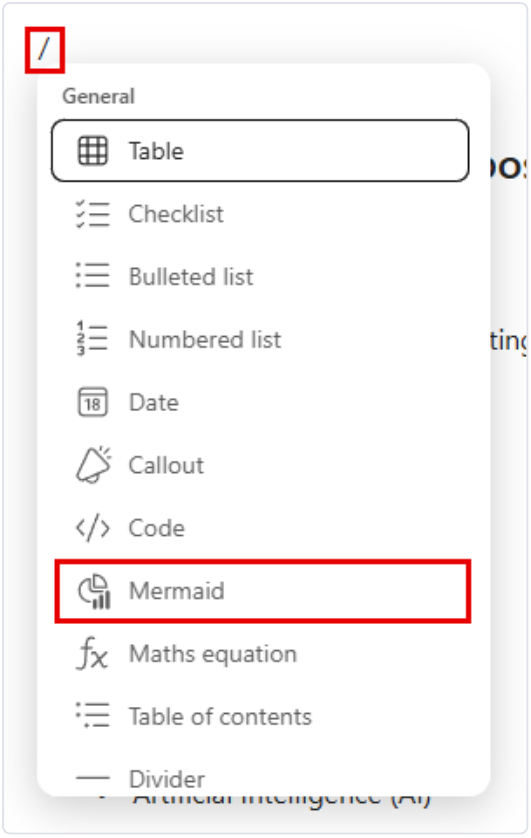
Copilot Pages supports Mermaid syntax for creating flowcharts and diagrams directly inside your document. This is useful for visualising your AI decision-making workflow without needing any drawing tools.

What is Mermaid?

Mermaid is a text-based diagramming tool. You write simple instructions and it renders a visual diagram automatically. No drawing required.

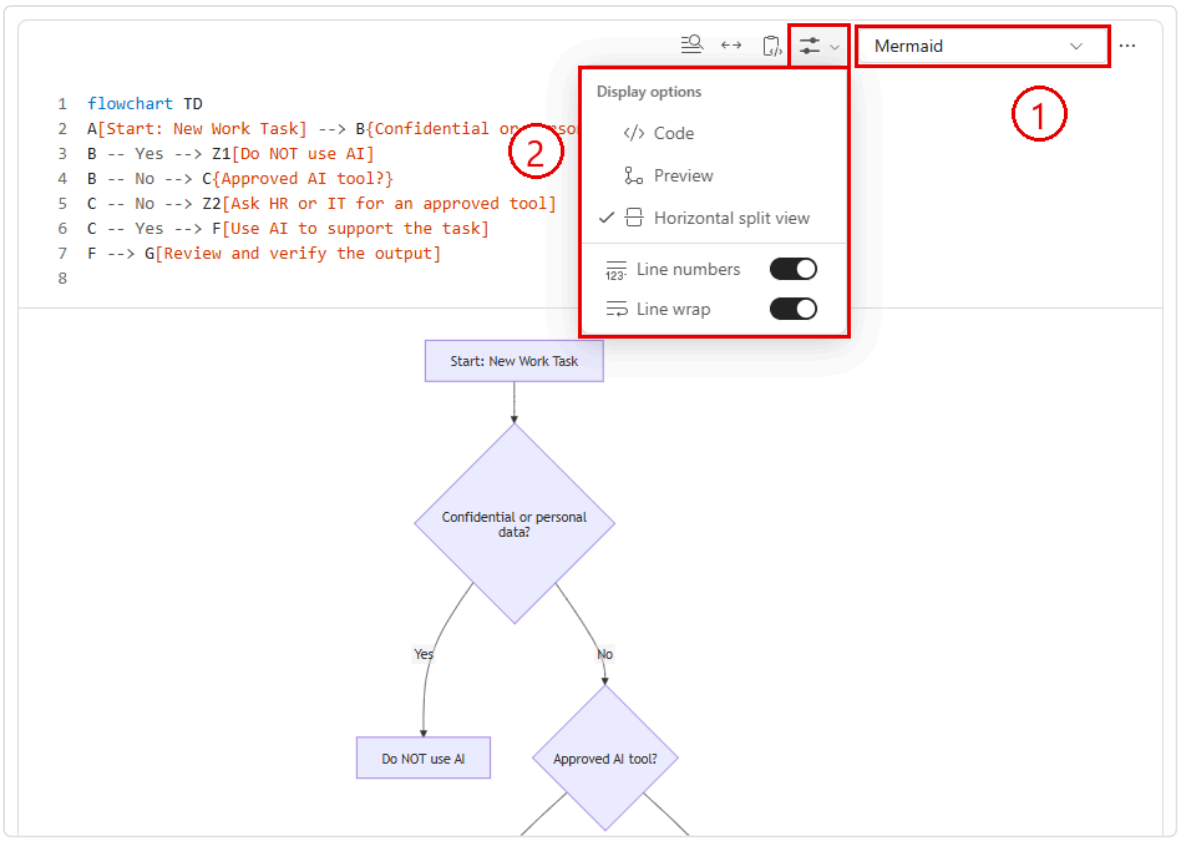
How to insert a Mermaid diagram in Pages

1. Place your cursor where you want the diagram
2. Type `/` to open the insert menu
3. Select **Mermaid**



Type / on an empty line and pick Mermaid from the insert menu.

4. Replace the sample code with your own diagram. The preview updates as you type.



Callout 1: the language selector at the top right of the block — it must say Mermaid for the diagram to render. Callout 2: Display options, where you choose Code, Preview, or Horizontal split view (code above, diagram below).

> **Common mistake:** When Copilot generates a Mermaid code block, it sometimes sets the language to "code" or leaves it blank. Always check the top right of the code block and change it to **Mermaid** if it is not already set. Otherwise the diagram will not render.

Example diagram

```
flowchart TD
    A[Start: New Work Task] ⟶ B{Does the task involve confidential or personal data?}
    B -- Yes ⟶ Z1[Do NOT use AI. Use standard processes.]
    B -- No ⟶ C{Is the AI tool approved by the organisation?}
    C -- No ⟶ Z2[Do NOT use AI. Ask HR or IT for an approved tool.]
    C -- Yes ⟶ D{Is manager approval required for this use?}
    D -- Yes ⟶ D1[Get manager approval first]
    D1 ⟶ E{Is the task suitable for AI?}
    D -- No ⟶ E
    E -- No ⟶ Z3[Do NOT use AI. Complete the task manually.]
    E -- Yes ⟶ F[Use AI to support the task]
    F ⟶ G[Review and verify the output before using it]
```

Exporting from Pages

When your draft is ready to move to Word:

1. Click the **...** menu at the top right of your Page
2. Select **Export**
3. Choose **Document** (Word) — or **PDF** if you only need a read-only copy

You will use this Word document in Topic 05 to reformat it as a formal management proposal.

HANDS-ON

Hands-on exercises

Use these prompts to build, refine, and finalise your AI Usage Guide draft in Copilot Pages.

> **How this topic connects to Topic 03:**
> At the end of Topic 03 you produced a structured research outline using the consolidation prompt. That outline is your starting point here.
>
> **If you are still in the same Copilot Chat session from Topic 03:** click **...** under your consolidation response → **Edit in Pages** → **Add to new page** and skip straight to Part 3.
>
> **If you closed that session:** paste your outline into a new Copilot Chat, run the Part 2 prompt below, then click **...** under the response → **Edit in Pages** → **Add to new page**.
>
> **If you did not complete Topic 03:** run the Part 2 prompt directly in Copilot Chat. It will generate a draft from scratch.
>
> **Session guide:** Parts 1 and 2 run in Copilot Chat. Parts 3 onwards run inside Copilot Pages using the Copilot panel. Stay in the same Page for all refining work.

Part 1 — Rename your chat session

Before continuing, rename your Copilot Chat session so it is easy to find later.

In the left sidebar, hover over the chat under **Chats**, click the three dots (**...**), choose **Rename**, and rename it to:

```
AI Usage Guide Draft - [your department]
```

Examples:

```
AI Usage Guide Draft - HR
AI Usage Guide Draft - Finance
AI Usage Guide Draft - Operations
```

> Renaming the session makes it easy to return to the same conversation if you close the browser or switch devices. It also makes the "Recent pages" list in Copilot much easier to navigate.

Part 2 — Generate your first draft in Copilot Chat

Run this in Copilot Chat, then click Edit in Pages on the response.

Option A — If you have your Topic 03 research outline:

Paste your outline into the chat first, then submit this prompt:

```
Using the research outline above, create a structured first draft
of an AI Usage Guide for my department.
```

```
Include these sections:
1. Introduction and Purpose
2. Scope: who this guide applies to
3. Approved AI Tools
4. Dos and Don'ts
5. Data Privacy Rules and PDPA Obligations
6. Human Review and Accountability
7. How to Report Issues or Mistakes
8. Review and Update Schedule

Write each section with real content based on the research above.
Keep the language clear and suitable for non-technical staff.
Aim for 600 to 800 words total. Use pages for this task.
```

Option B — If you are starting from scratch:

```
Create a structured first draft of an AI Usage Guide for
[your department] at a mid-sized Malaysian company.

Include these sections:
1. Introduction and Purpose
2. Scope: who this guide applies to
3. Approved AI Tools
4. Dos and Don'ts
5. Data Privacy Rules and PDPA Obligations
6. Human Review and Accountability
7. How to Report Issues or Mistakes
8. Review and Update Schedule

Write each section with real content suitable for non-technical staff.
Reference PDPA 2010 in the Data Privacy section.
Aim for 600 to 800 words total.
```

Once the draft appears, click **...** under the response → **Edit in Pages** → **Add to new page**. All remaining prompts in this topic should be run inside Copilot Pages.

Part 3 — Review and improve the overall structure

Run this inside Copilot Pages using the Copilot panel.

```
Review this AI Usage Guide draft and improve the structure.

Make the document easier to read by:
- improving the section headings to be clearer and more action-oriented
- grouping related ideas together
- removing any repeated points
- converting long paragraphs into shorter paragraphs or bullet points where appropriate
- making the flow more logical for an employee reading this for the first time

Do not remove any important policy, privacy, or risk information.
```

Part 4 — Rewrite the Introduction

```
Rewrite the Introduction section so it opens with a short
one-sentence workplace scenario showing why having an AI
guideline matters.

After the scenario, explain the purpose of the guide in 2
to 3 sentences.

Keep the tone professional, warm, and suitable for
non-technical staff. Avoid jargon.
```

Part 5 — Strengthen the Dos and Don'ts section

```
The Dos and Don'ts section is too generic. Rewrite it with
at least 3 specific examples relevant to [your department].

Format it as a table with two columns: Do and Do Not.

Keep each point to 1 to 2 sentences. Include the reason
behind each point so employees understand why, not just what.
```

Part 6 — Add department-specific examples

```
Add a new section called "Examples of AI Use in [your department]".

Include at least 5 practical examples of how AI tools can
help with real tasks in this department.

For each example, include:
- the task name
- how AI can assist
- what the employee must check before using the output

Keep examples realistic for a Malaysian corporate workplace.
```

Part 7 — Strengthen the Data Privacy section

```
The Data Privacy section needs more depth. Improve it by:

1. Adding a paragraph explaining why PDPA 2010 matters
   specifically when employees use AI tools.

2. Adding a clear list of information employees must never
   enter into any AI tool, including:
   - personal data of employees or customers
   - IC numbers, passport numbers, or any government ID
   - salary, bank account, or financial details
   - confidential business strategies or unpublished financials
   - client contracts or legally privileged information
   - passwords or system credentials
```

```
Keep the wording practical and easy to understand for
non-technical staff.
```

Part 8 — Add Human Review and Accountability

```
Add a section called "Human Review and Accountability".

Explain that AI tools assist employees but do not replace
human judgement. Include guidance on:

- always reviewing AI output before using it
- checking facts and verifying sources independently
- reviewing tone and appropriateness for the audience
- watching for signs of hallucination or inaccuracy
- confirming that all final decisions remain with a human
- not copy-pasting AI output directly without reading it first

Keep the tone practical and non-technical. Use short
paragraphs or a bullet list.
```

Part 9 — Add a FAQ section

```
Add a short FAQ section at the end of the guide with the
title "Frequently Asked Questions".

Write 6 questions that a new employee might ask on their
first week using AI tools at work. For each question,
write a clear, direct answer in 2 to 3 sentences.

The questions should cover: what is allowed, what is not
allowed, what to do if something goes wrong, whether AI
output can be trusted, and how to get help.
```

Part 10 — Final polish

```
Do a final review of the entire document. Check for:

1. Consistency: same tone and style throughout
2. Clarity: no unexplained jargon or acronyms
3. Completeness: nothing important missing for a staff-facing policy
4. Length: is any section too long or too short?
5. Formatting: are headings, lists, and paragraphs used consistently?

List what you changed and why. Then show the improved version.
```

Part 11 — Create a Mermaid decision flowchart

This part is done in Copilot Chat, then pasted into Pages manually.

Run this prompt in Copilot Chat to generate the diagram code:

```
Create a Mermaid flowchart for the decision an employee should
make before using an AI tool for a work task.

The flowchart should include these decision points:
1. Does the task involve confidential or personal data?
2. Is the AI tool approved by the organisation?
3. Is manager approval required for this type of use?
4. Is the task suitable for AI assistance?
5. Has the output been reviewed before use?

Use clear, short labels on each node. End with either
"Proceed with AI assistance" or "Do not use AI for this task".

Give me the raw Mermaid code only, no explanation.
```

To insert the diagram into your Pages document:

1. In your Copilot Page, place your cursor where you want the diagram
2. Type `/` to open the insert menu
3. Select **Mermaid**
4. Select the sample code inside the block and paste the Mermaid code Copilot generated over it
5. The diagram renders below the code. Use **Display options** (top right of the block) to switch between Code, Preview, and Horizontal split view

> **If the diagram does not render:** check that the language selector at the top right of the block is set to Mermaid and not to "code" or left blank. This is the most common reason it does not work.

Part 12 — Prepare for export

Run this final check before exporting to Word:

```
This document will be exported to Microsoft Word and submitted
to management as a formal proposal. Review it one more time with
that audience in mind.

Suggest any final changes that would make it more suitable for
senior management review. Focus on:
- the executive summary or introduction
- the professional tone throughout
- anything that looks incomplete or informal
- any section that needs strengthening before it goes to a manager
```

Once you are satisfied with the draft:

1. Click the **...** menu at the top right of your Page
2. Select **Export**
3. Choose **Document** (Word)

You will use this Word document in Topic 05 to reformat it as a formal management proposal.

05

CHAPTER 5

Copilot in Word

You have built your AI Usage Guide draft in Copilot Pages. Now it is time to turn it into a formal proposal document you can submit to your supervisor or management team.

Continuing from Topic 04

At the end of Topic 04 you exported your draft from Copilot Pages as a Word document. That Word file is your starting point here.

If you have not exported from Pages yet:

1. Open your Copilot Page from Topic 04
2. Click the **...** menu at the top right of the page
3. Select **Export** then **Document**
4. Save the file to your OneDrive or desktop
5. Open it in Microsoft Word

If you cannot find your Pages document:
Go to m365.cloud.microsoft, click the **...** menu at the top right, and select **Recent pages**. Your Topic 04 document should be listed there.

> Once the Word document is open, make sure you are connected to Microsoft 365 (signed in with your work account) so Copilot in Word is available. Look for the round **Copilot** button floating at the bottom right of the document.

What Copilot Can Do in Word

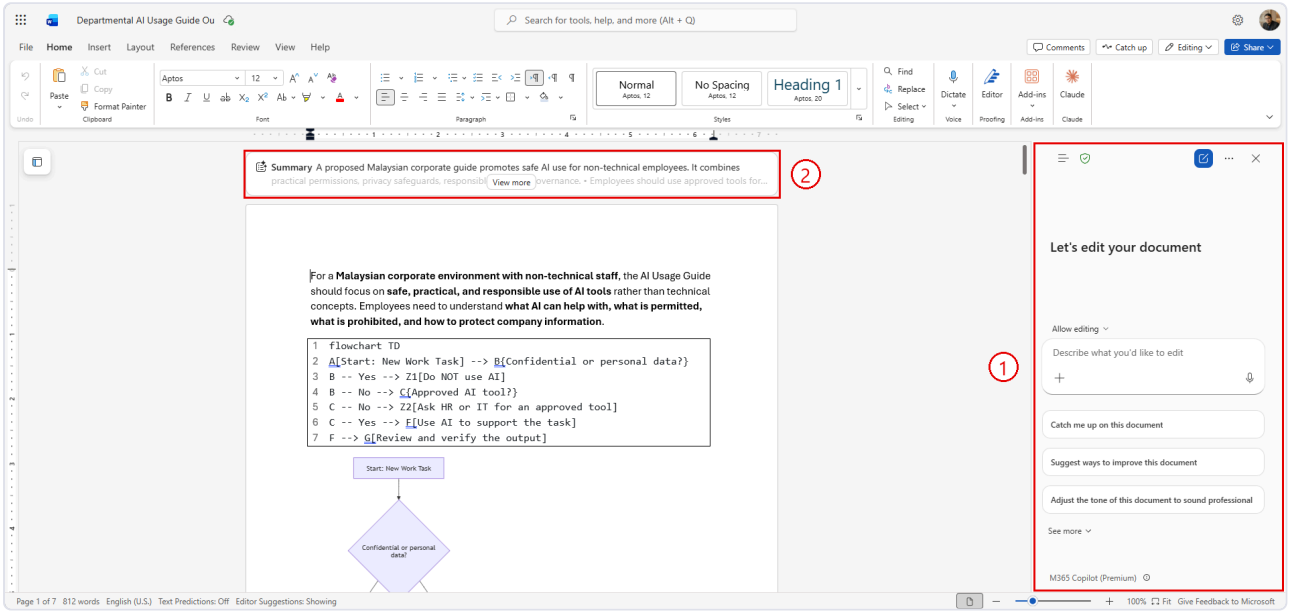
- Draft new content from a prompt
- Rewrite, shorten, or expand existing text
- Change the tone from casual to formal or vice versa
- Summarise long documents
- Generate tables, lists, and structured sections
- Reference other files from your Microsoft 365 account using the `/` key

Three Ways to Use Copilot in Word

This is where participants often get confused. There are three separate Copilot entry points in Word and each does something different.

1. Copilot Chat panel (side panel)

Click the round **Copilot** button that floats at the bottom right of the document to open the full Copilot panel on the right side of the screen. (It may already be open when you first open a document.) The panel starts with **Allow editing** selected, so Copilot can make changes to the document directly, plus suggested prompts such as *Catch me up on this document*.



Callout 1: the Copilot panel ("Let's edit your document") opens on the right side. Callout 2: the Summary bar appears at the top of the document — click View more to expand it.

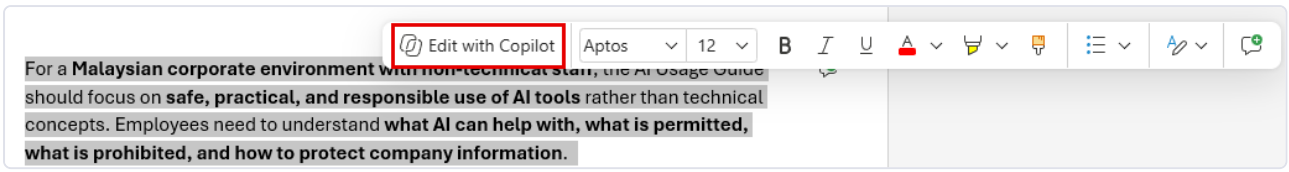
Use the Chat panel for:

- Restructuring the entire document
- Adding new sections that do not exist yet
- Referencing other files from OneDrive or SharePoint using `/`
- Asking broad questions about the document as a whole
- Generating a summary or cover page

The panel can see the whole document, not just the section you are in.

2. Edit with Copilot (highlight to edit)

Select any text in your document and a mini toolbar appears above it. Click **Edit with Copilot** to open an inline prompt box targeting just that selection.



Select any text and click Edit with Copilot in the mini toolbar to rewrite just that selection.

Use this for:

- Rewriting or improving a specific paragraph
- Changing the tone of one section without affecting the rest
- Shortening or expanding a particular piece of text
- Fixing a sentence that does not read well

This is the most precise entry point since it only acts on exactly what you have selected.

3. Adding new content in a specific place

Word for the web no longer shows a Copilot icon in the margin on blank lines. To add new content at a specific point, keep **Allow editing** selected in the Copilot panel and say where it should go, for example: *Add a short section called "Reporting Mistakes" after the Human Review section.*

> **Practical tip:** Start with the Copilot panel for big structural changes and new sections. Use Edit with Copilot for targeted rewrites of a selected paragraph.

Workshop Scenario

Your AI Usage Guide draft is now in Word. The goal here is to reframe and polish it as a **formal proposal** that your supervisor can read, approve, and sign off on.

A proposal has a different structure from a guideline. It needs to make a case for why this guide is necessary, what changes are needed to implement it, and what the expected outcome is. Copilot will help you add the missing sections and elevate the language to management level.

Referencing Other Documents

If you have other files in your OneDrive or SharePoint, you can reference them directly in Copilot using the `/` key in the Chat panel. Type `/` and start typing the file name. Copilot will search your connected Microsoft 365 files and let you select one.

This is useful for checking your AI Usage Guide against existing company policies to make sure there are no conflicts.

Tips for Working with Copilot in Word

- Use **Edit with Copilot** (select text first) for section-level edits and the **Copilot panel** for document-wide tasks and new sections.

- Always review Copilot's output before finalising. It will sometimes rephrase things in ways that do not match your intended meaning.
- Turn on **Track Changes** (Review tab) before asking Copilot to make revisions so you can compare before and after and accept or reject changes selectively.
- If the document is very long, Copilot may not see all of it at once. Work section by section rather than asking it to revise everything in one prompt.
- Save regularly. Copilot edits in Word are not automatically undoable the same way typing is.

HANDS-ON

Hands-on exercises

Use these prompts to turn your AI Usage Guide draft into a formal management proposal.

> **Session guide:** All prompts in this topic are used inside Microsoft Word, not in Copilot Chat. Use the **Copilot panel** (round Copilot button, bottom right of the document) for structural and document-wide prompts. Use **Edit with Copilot** (select the text, then click Edit with Copilot in the mini toolbar) for section-level rewrites. You do not need to start a new Copilot Chat session for this topic.

Part 1 — Reformat as a proposal

Use the Copilot Chat panel for this prompt.

This is your starting point. Run this first before making any other changes.

```
Reformat this document as a formal proposal to submit
to management. Add these sections if they are not
already present:

1. Executive Summary (max 150 words)
2. Business Justification: why this guideline is needed now
3. Implementation Steps: what needs to happen to roll this out
4. Expected Outcomes: what the organisation will gain
5. Approval and Sign-off section

Keep all existing content but adjust the tone to be
formal and suitable for senior management.
```

Part 2 — Strengthen the Executive Summary

Select the Executive Summary and use Edit with Copilot, or use the Copilot panel.

```
Rewrite the Executive Summary in exactly 3 sentences:
- Sentence 1: the problem this guideline addresses
- Sentence 2: the proposed solution
- Sentence 3: the expected benefit to the organisation

Keep it under 80 words. Make it compelling enough that
a busy senior manager will want to keep reading.
```

Part 3 — Strengthen the Business Justification

Use the inline Copilot on the Business Justification section.

```
The Business Justification section needs to be stronger.
Add 2 specific realistic examples of risks that Malaysian
companies have faced or could face when employees use AI
tools without formal guidelines.

Focus on data privacy risks and reputational risks.
Keep it factual and professional.
```

Part 4 — Add a risk section

```
Add a new section called "Risk of Not Having This Guideline".

Include 3 consequences for the organisation if AI usage
remains unregulated. Write each consequence as a short
paragraph covering: what could happen, why it matters,
and how it could have been prevented.

Keep the tone factual and professional, not alarmist.
```

Part 5 — Adjust tone and style

Use the Copilot Chat panel to apply this across the whole document.

```
This document will be submitted to senior management for
approval. Review the entire document and rewrite any
sections that are too informal, too casual, or too
conversational for a management submission.

Keep the language clear and easy to scan. Use formal
business English throughout. Do not make it overly
academic or difficult to read.
```

Part 6 — Improve the Dos and Don'ts section

Use the inline Copilot on that section.

```
The Dos and Don'ts section currently reads as a rules list.
Rewrite it as a set of guided principles.

For each point, add a one-sentence rationale so employees
understand why the guideline exists, not just what it says.

Keep each point to 2 to 3 sentences maximum.
```

Part 7 — Cross-reference with existing company policy

Use the Copilot Chat panel with the `/` key to reference a file.

If you have your company's IT policy, HR policy, or data privacy policy in OneDrive, reference it here. Type `/` in the Chat panel and select the file.

```
Using the [type / and select your company policy file],
check whether any recommendations in this AI Usage Guide
conflict with our existing company policy.

List any inconsistencies and suggest how they could be
resolved so both documents align.
```

If you do not have a company policy file, use the workshop sample document instead:

```
Using the [type / and select Data_Privacy_AI_Acceptable_Use_Policy],
check whether any recommendations in this AI Usage Guide
conflict with the data privacy policy.

List any inconsistencies and suggest how to resolve them.
```

Part 8 — Final formatting check

Use the Copilot Chat panel.

```
Review the entire document for formatting consistency.
Check that:
- all headings use the same style and hierarchy
- all bullet points are parallel in structure
- the tone is consistent throughout
- no sections are significantly longer or shorter
  than the others without good reason
- all section titles are clear and action-oriented

List what you changed and why.
```

Part 9 — Create a cover summary page

Use the Copilot Chat panel.

```
Create a one-page cover summary for this proposal.

Include:
- Document title
- Purpose statement in 2 sentences
- 3 key recommendations as bullet points
- Prepared by: [your name and department]
- Date: [today's date]
- A sign-off block with spaces for: name, designation,
  date, and signature

Format it cleanly so it can be used as the first page
of the proposal when printed.
```

Part 10 — Using Track Changes

Before making final Copilot revisions, turn on Track Changes so you can review and accept or reject each change individually.

1. Go to the **Review** tab in the ribbon
2. Click **Track Changes** to turn it on
3. Submit any remaining Copilot prompts
4. Review the suggested changes one by one using **Accept** or **Reject**

This is especially useful when Copilot rewrites whole sections and you want to keep parts of the original.

```
Make one final pass over the document. Tighten any
sentences that are longer than 25 words. Remove any
filler phrases like "it is important to note" or
"in order to". Keep the meaning intact.
```

Part 11 — Prepare to send

Once you are satisfied with the proposal, save it and prepare it for Topic 06 where you will email it to your supervisor for approval.

```
Write a brief handover note summarising this proposal
in 5 bullet points. This will be used as the body of
an email to my supervisor requesting approval.

Include: what the document is, why it was created,
what action is needed from the reader, the deadline
for a response, and who to contact with questions.
```

Save this output. You will use it in Topic 06.

06

CHAPTER 6

Copilot in Outlook

Your proposal is ready. Now you need to send it to your supervisor and manage the conversation that follows. Copilot in Outlook helps you draft emails, summarise threads, and keep up with replies without spending half your day in your inbox.

Continuing from Topic 05

At the end of Topic 05 you generated a handover note summarising your proposal in 5 bullet points. Use that as the basis for your submission email in this topic.

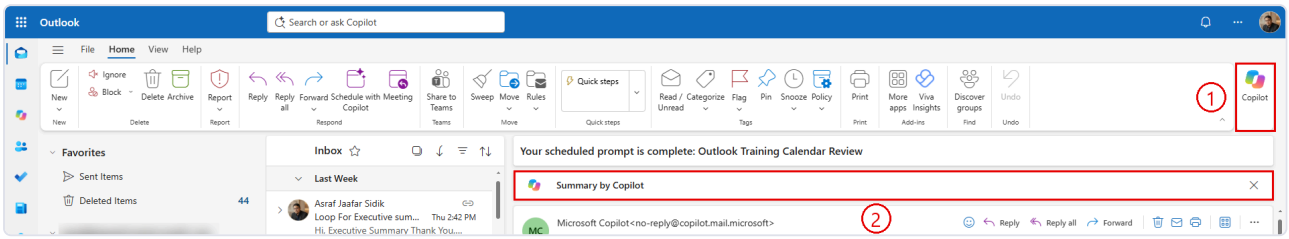
If you saved the handover note: paste it into the Copilot prompt when drafting your submission email and tell Copilot to turn it into a professional email.

If you did not save it: go back to your Word document, open the Copilot Chat panel, and run the Part 11 prompt from Topic 05 to regenerate it. Then come back here.

What Copilot Can Do in Outlook

- Draft emails from a short description or bullet points
- Adjust tone, length, and formality of any email
- Summarise long email threads
- Suggest replies based on the context of a conversation
- Coach you on how your email might land with the reader
- Answer questions about your whole mailbox, not just the email you have open
- Tidy your inbox from a plain-language request: move, flag, categorise or archive emails, and set up inbox rules
- Prioritise incoming email as high, normal or low, with a reason
- Turn an email thread into a meeting invite with **Schedule with Copilot**

Where to Find Copilot in Outlook



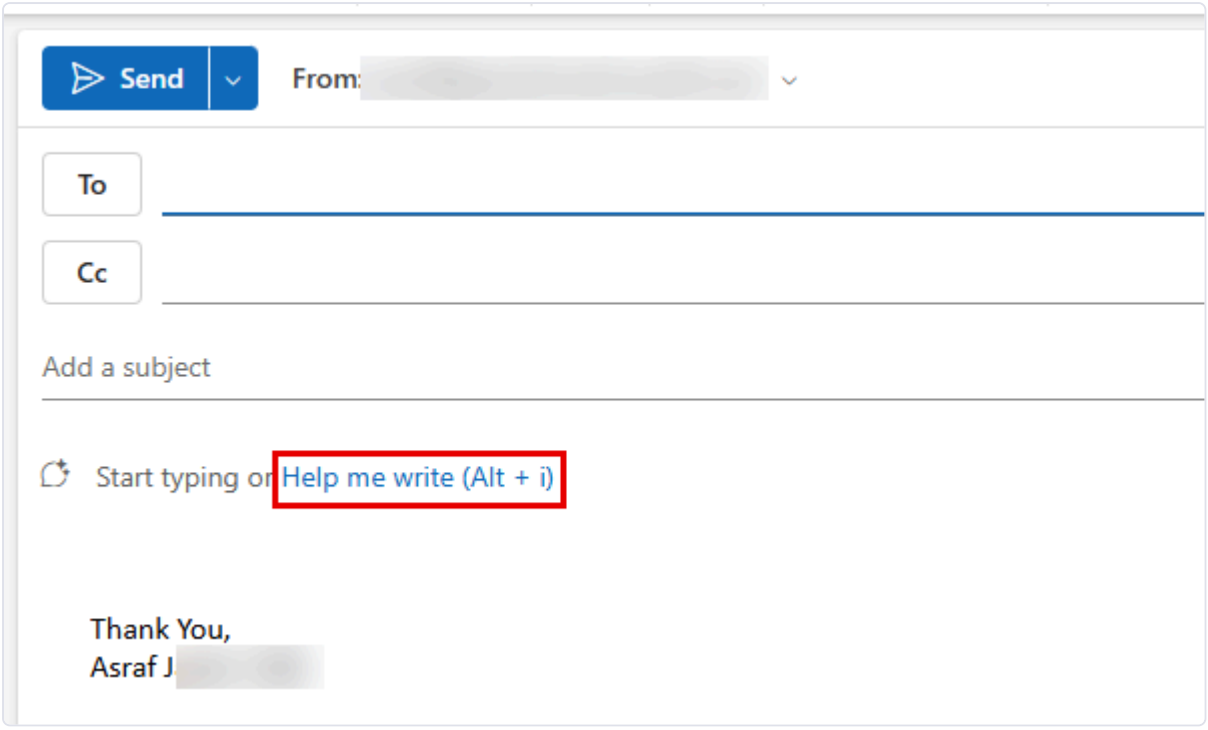
Callout 1: the Copilot button in the top right of the ribbon opens the full Copilot panel. Callout 2: when you open an email, a "Summary by Copilot" bar appears at the top of the reading pane automatically.

There are two main entry points for Copilot in Outlook:

Entry point	Where to find it	Best for
Copilot button	Top right of the ribbon (Home tab)	Opening the full Copilot panel for chat, thread summary, and coaching
Summary by Copilot	Top of any open email	Quick summary of the selected email or thread
Help me write	Inside the new email compose window	Drafting a new email from a short description
Reply with Copilot	Reading pane when an email is selected	Drafting a reply with context from the thread
Coaching by Copilot	After drafting an email	Getting feedback on tone, clarity, and reader sentiment

Drafting a New Email

When you start a new email, look for the **Help me write** button in the compose window.



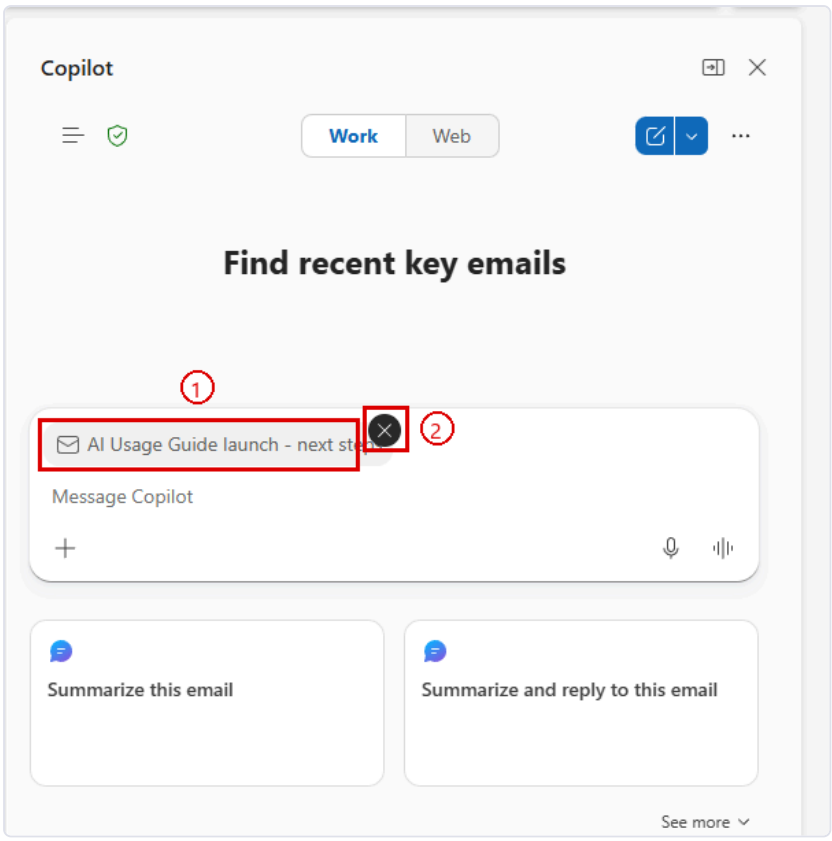
*"Start typing or Help me write" appears in the body of a new email. Click **Help me write** (or press Alt + I) to open the Copilot drafting prompt.*

Click **Help me write**, describe what you want the email to say, and Copilot will generate a full draft. You can then refine it by asking Copilot to make it shorter, more formal, or to adjust the tone before sending.

Ask About Your Whole Mailbox

Open the **Copilot** pane with the **Copilot** button at the right end of the ribbon. If an email is open, Copilot attaches it to the prompt box and focuses on that thread. Hover over the email in the prompt box and select its **X** to remove it and ask about your whole mailbox instead, for example:

- *What do I need to reply to today?*
- *Has anyone replied about the AI Usage Guide since Monday?*
- *Find the email where my manager mentioned the approval deadline.*



Callout 1: the open email, attached to the prompt box. Callout 2: the X that removes it, so Copilot searches your whole mailbox.

> **Tip:** leave the email in the prompt when you want answers about that one conversation. Remove it when the answer could be anywhere in your mailbox.

Tidy Your Inbox with Copilot

You can ask Copilot to do the housekeeping you would normally do by hand. Type what you want in the Copilot pane, in plain language:

- *Move all emails about the AI Usage Guide into a new folder called AI Guide.*
- *Flag the emails from my manager this week.*
- *Mark everything in the Newsletters folder as read.*
- *Categorise replies to my proposal as "Feedback".*

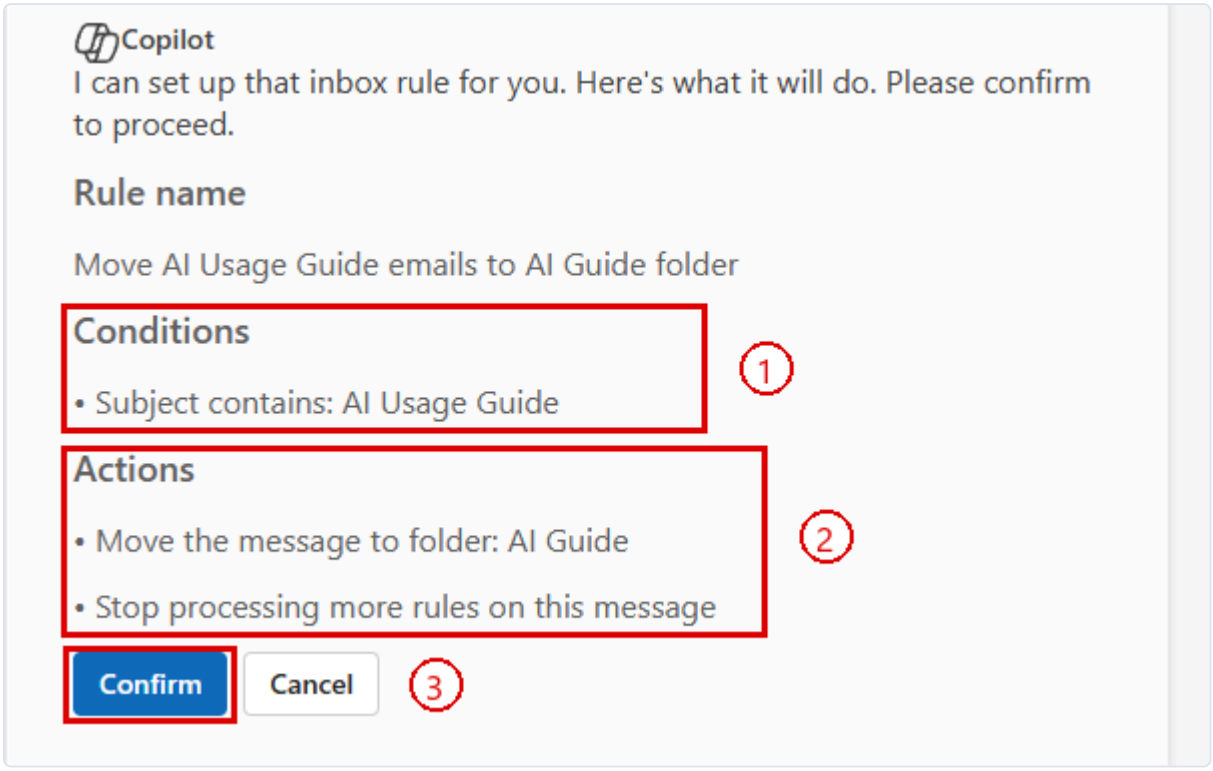
Copilot can pin, flag, mark as read or unread, archive, delete, move, copy and categorise emails, mark them as junk, and create folders.

Inbox rules

Copilot can also create, list, change and delete **inbox rules**, so the same tidying happens automatically to future emails:

- *Create a rule that moves emails with "AI Usage Guide" in the subject to the AI Guide folder.*
- *Show me my inbox rules.*

Before it creates or changes a rule, Copilot shows a summary (the rule name, its **Conditions** and its **Actions**) and asks you to **Confirm** or **Cancel**. Like any inbox rule, it applies to email you receive from then on.



Callout 1: the condition. Callout 2: the actions, including stopping any further rules for that message. Callout 3: Confirm. Nothing changes until you select it.

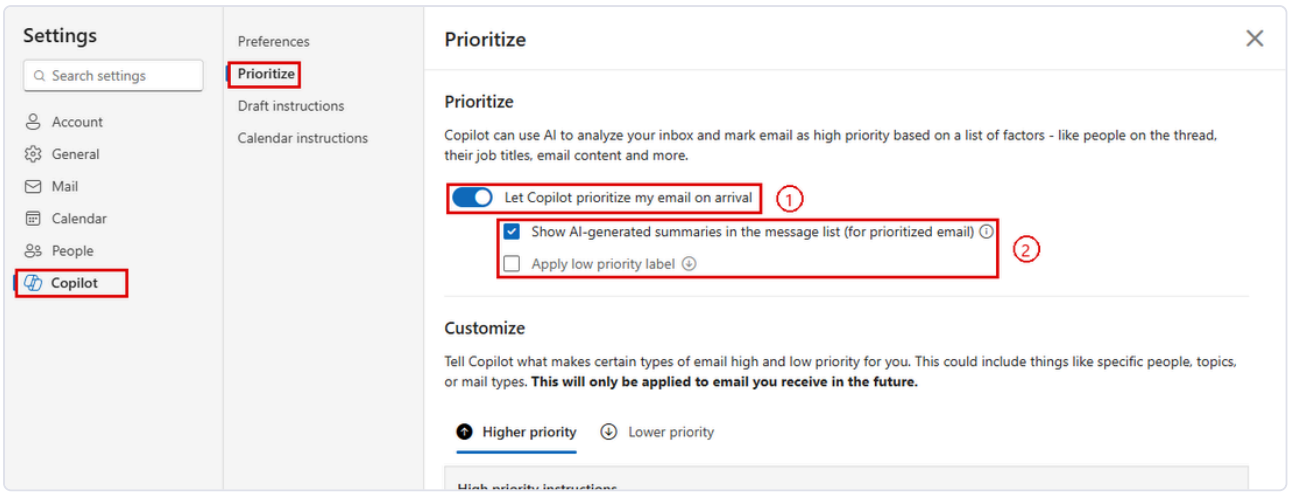
> **Key point:** Copilot asks for confirmation before it acts on more than five emails or changes a rule. Read the summary before you confirm, especially anything that deletes email.

> **License note:** inbox actions and rules need a Microsoft 365 Copilot (Premium) license. Some actions may still be labelled **Frontier** (preview) in your tenant, so check with your trainer if a request is not recognised.

Prioritize My Inbox

Copilot can sort incoming email by importance, marking each message **high**, **normal** or **low** priority based on who sent it and what it is about, with a short reason.

1. Open **Settings**: the gear icon at the top right, or **...** (top right) then **Settings** if the gear is hidden.
2. Select **Copilot**, then **Prioritize**, and turn on **Let Copilot prioritize my email on arrival**.
3. Optionally tick **Show AI-generated summaries in the message list** and **Apply low priority label**, then select **Save**.



Callout 1: the Let Copilot prioritize my email on arrival toggle. Callout 2: its two options. Under Customize you can also tell Copilot what makes email higher or lower priority for you.

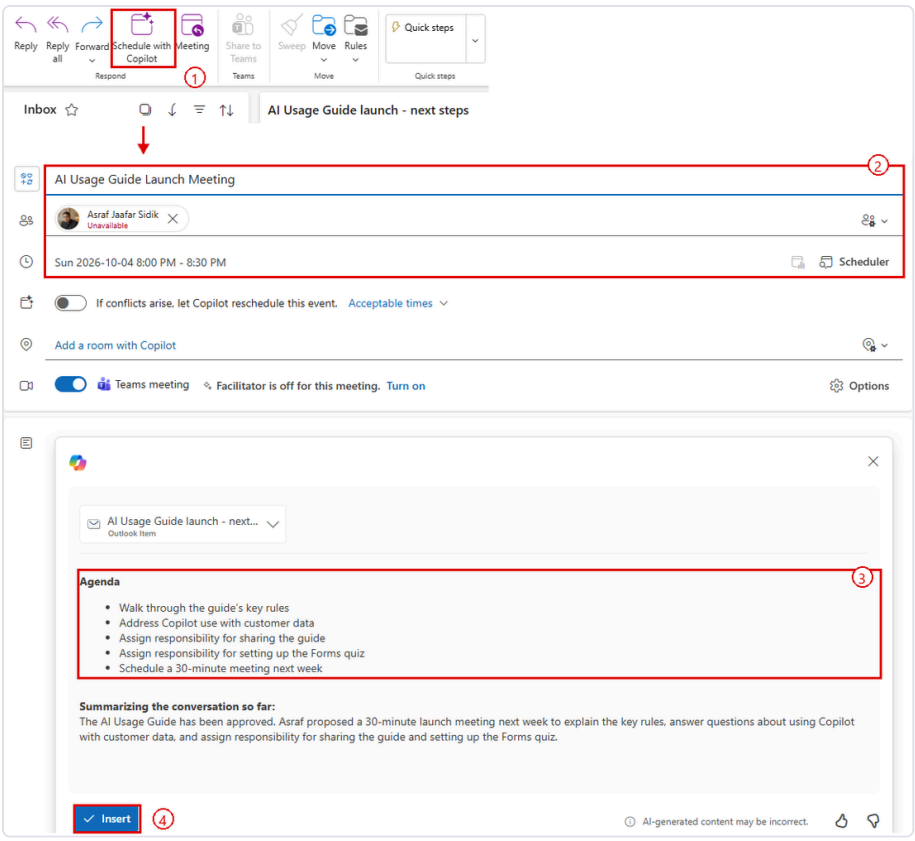
The same Copilot settings section has **Draft instructions** (how Copilot should write for you, such as tone and sign-off) and **Calendar instructions**.

> **Good habit:** treat the priority as a suggestion. Spend a week checking what Copilot marks as low priority before you rely on it to decide what you can skip.

Schedule with Copilot

When an email conversation needs a meeting, Copilot can set it up from the thread:

1. Open the email thread.
2. Select **Schedule with Copilot** in the **Respond** section of the ribbon. The meeting invitation opens in a new window.
3. Copilot drafts the meeting: subject, attendees from the thread, a suggested time when people are free, and a Copilot card with an **Agenda** and a summary of the conversation so far.
4. Select **Insert** to add the agenda and summary to the invitation, check the draft, change anything that is wrong, and send it.



Callout 1: Schedule with Copilot in the ribbon. Callout 2: the drafted subject, attendees and time. Callout 3: Copilot's agenda. Callout 4: Insert, which adds the agenda to the invitation.

You can also ask in the Copilot pane, for example *Find 30 minutes next week with everyone on this thread*. Copilot suggests the slots that suit the most people, within your working hours and time zone.

> **License note:** Schedule with Copilot needs a Microsoft 365 Copilot (Premium) license.

Workshop Scenario

You will send your AI Usage Guide proposal to your supervisor for approval, then manage the back-and-forth conversation using Copilot to draft replies, track what has been agreed, and finally announce the approved guideline to your team. Along the way you will tidy the replies into their own folder and schedule the launch meeting you run in Topic 10.

Tips for Copilot in Outlook

- The **Help me write** button appears when you open a new email compose window. If you do not see it, check that you are using the new Outlook (not the classic version).
- For replies, select the email in the reading pane and look for **Reply with Copilot** or use the Copilot panel.
- Copilot automatically reads the email thread you have open, so it understands the context without you needing to explain it.

- Thread summaries are especially useful when you return from leave or need to catch up on a long conversation quickly.
- Use **Coaching by Copilot** before sending any important email, especially one going to senior management. It flags tone issues you might not notice yourself.
- Remove the open email from the Copilot prompt box when you want to search your whole mailbox.
- Turn a one-off tidy-up into a rule once you find yourself asking for it twice.

HANDS-ON

Hands-on exercises

Use these prompts to draft, send, and manage the email conversation around your proposal.

> **Session guide:** All prompts in this topic are used inside Outlook. Use **Help me write** for new emails. Use the **Copilot panel** for thread summaries and coaching, and for tidying, catching up and scheduling in Parts 10 to 12. You do not need Copilot Chat for this topic.

Part 1 — Submit the proposal

Use Help me write in the new email compose window.

If you saved your handover note from Topic 05, paste it before the prompt below and tell Copilot to turn it into an email:

```
Turn these bullet points into a professional email to my
department head submitting the AI Usage Guide for approval:

[paste your handover note here]

Keep it under 150 words. Formal but approachable tone.
```

If you did not save the handover note, use this prompt directly:

```
Draft a professional email to my department head submitting
the AI Usage Guide for approval. Include:
- The guide was developed over the past two weeks
- It covers responsible AI use, approved tools, dos and
  don'ts, and data privacy obligations under PDPA
- I am requesting a review and approval by [next Friday]
- I am happy to present it in person if helpful

Under 150 words. Formal but approachable tone.
```

Part 2 — Attach and reference the document

After Copilot drafts your email, add a line referencing the attached proposal. You can ask Copilot to include it:

```
Add a sentence near the end of the email mentioning that
the full proposal is attached as a Word document and that
a one-page cover summary is included at the front.
```

Part 3 — Coaching before you send

Before sending, click Coaching by Copilot in the compose window.

```
Does this email come across as professional and respectful?
Is the request clear? How might my department head feel
reading this?
```

Ask Copilot to adjust based on the feedback:

```
Make the tone slightly warmer. It should feel like a
colleague making a professional request, not a formal
submission to a committee.
```

Part 4 — Follow up after no response

```
I sent a proposal email to my supervisor 3 working days
ago and have not received a reply. Draft a polite
follow-up email that reminds them about the proposal
without sounding impatient or pushy. Under 80 words.
```

Part 5 — Respond to feedback requesting changes

```
My supervisor replied asking me to add a section on what
happens if someone misuses AI at work, including
consequences. Draft a reply:
- Acknowledging their feedback positively
- Confirming I will add the section
- Giving a revised submission date of [date]
- Thanking them for their time

Keep it brief, under 100 words.
```

Part 6 — Respond to approval

```
My supervisor approved the proposal but asked for a few
minor wording changes before circulating it to the team.
Draft a short reply:
- Thanking them for the approval
- Confirming I will make the changes
- Letting them know I will share the final version by [date]

Keep it under 60 words. Warm and professional.
```

Part 7 — Announce the approved guideline to the team

```
Draft an email to my full team announcing that the AI
Usage Guideline has been approved by management and
takes effect from [date].

Tone: positive and encouraging. This is good news for
the team, not a policy enforcement announcement.

Include:
- What the guideline covers in one sentence
- Where they can find the document
- Who to contact with questions

Under 200 words.
```

Part 8 — Summarise a long email thread

Open the email thread in Outlook, then use the Copilot panel.

```
Summarise this email thread. What has been agreed,
what is still unresolved, and what action is needed
from me?
```

If the thread is about the proposal specifically:

```
Based on this email thread, what changes to the AI
Usage Guide has my supervisor requested? List them
as a checklist I can work through.
```

Part 9 — Email coaching prompts

Use these after drafting any important email by clicking **Coaching by Copilot**:

```
Does this email sound too pushy? How might the reader
feel receiving this?
```

```
Is my request clear? What could be misunderstood?
```

```
Is the tone appropriate for emailing a senior manager?
What would you change?
```

```
Is this email too long? What could be cut without
losing the key message?
```

Part 10 — Tidy the replies into a folder

Use the Copilot pane (top right). Remove any open email from the prompt box first.

```
Move all emails about the AI Usage Guide from the last two
weeks into a new folder called AI Guide.
```

Then make it automatic for future replies:

```
Create a rule that moves emails with "AI Usage Guide" in the
subject to the AI Guide folder.
```

Read the summary Copilot shows (the rule name, conditions and actions) before you select **Confirm**. The rule applies to email you receive from then on.

```
Show me my inbox rules.
```

Part 11 — Catch up across your mailbox

Use the Copilot pane with no email attached to the prompt.

```
What has been agreed about the AI Usage Guide so far, and who
has not replied yet?
```

```
List any emails from this week that need a reply from me,
most urgent first.
```

Part 12 — Schedule the launch meeting

Open your supervisor's approval email, then select Schedule with Copilot in the ribbon.

The invitation opens in a new window. Check the draft Copilot creates (attendees, time, agenda and summary) and select **Insert** to add the agenda to the invitation. Then refine it in the Copilot pane if needed:

```
Make this a 30-minute Teams meeting next week with my whole
team, titled "AI Usage Guide launch". Keep the agenda to 4
items: welcome, walkthrough of the key rules, questions, and
next steps.
```

This is the meeting you run in Topic 10 (Copilot in Teams).

07

CHAPTER 7

Copilot in PowerPoint

Your proposal has been approved. Now you need to communicate the AI Usage Guideline to your team. A presentation is the clearest way to do this, and Copilot in PowerPoint can build it directly from your Word document.

Continuing from Topic 06

Your proposal has been approved and you have sent the team announcement email. Now it is time to present the AI Usage Guideline to your department in person.

You will use the approved Word document from Topic 05 as the source. Copilot reads it and generates the slides automatically. The better your Word document, the better the generated presentation.

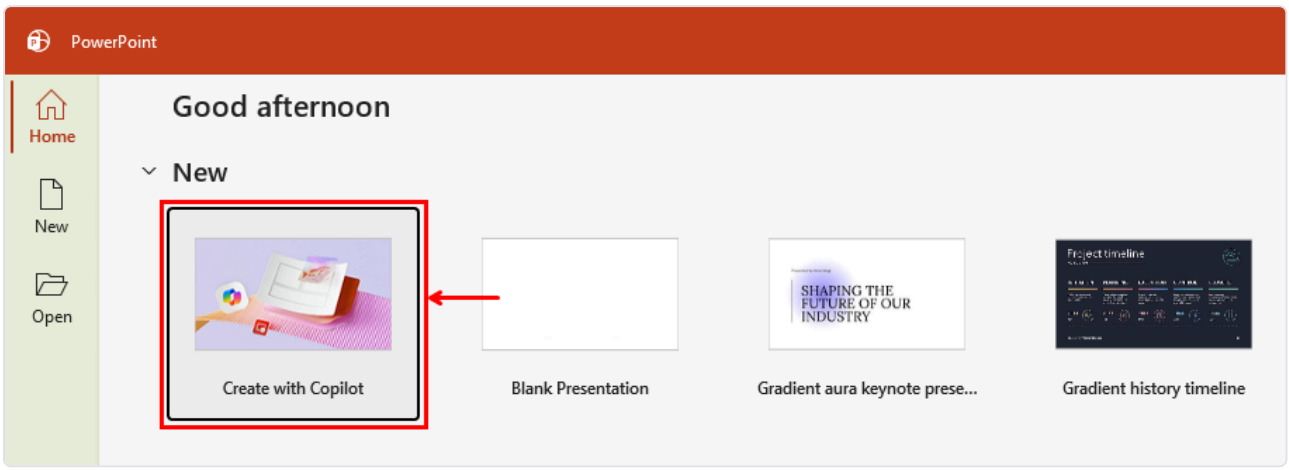
What Copilot Can Do in PowerPoint

- Generate a full presentation from a Word document or a text prompt
- Add slides, rewrite slide content, and adjust layouts
- Suggest speaker notes for each slide
- Summarise presentations
- Help you change the overall tone or style

Two Ways to Start a Presentation with Copilot

Option 1: Create with Copilot from the PowerPoint home screen

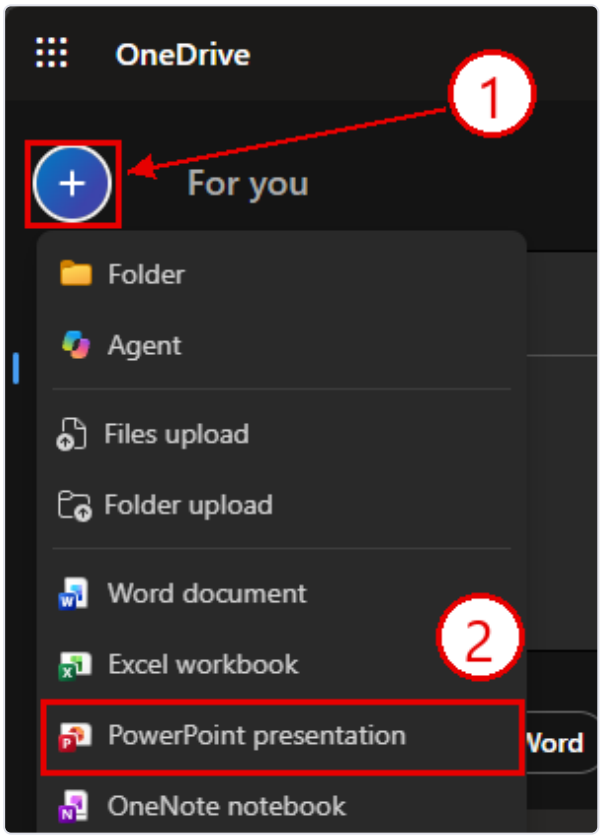
When you open PowerPoint, the first option in the New section is **Create with Copilot**.



Click "Create with Copilot" from the PowerPoint home screen to start a new presentation with Copilot from the beginning.

Option 2: Create from OneDrive

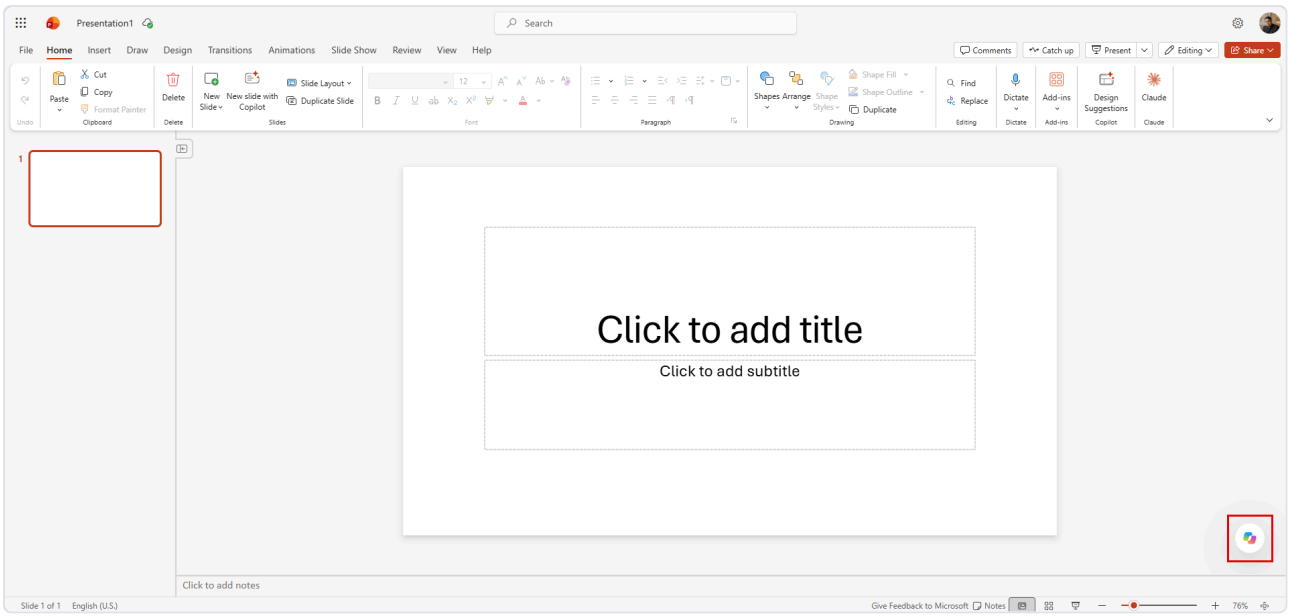
If you prefer to start from OneDrive, you can create a new PowerPoint presentation directly from there.



*In OneDrive, click the **+** (Create or upload) button (callout 1) then select "PowerPoint presentation" (callout 2). The new file opens in PowerPoint for the web with Copilot available.*

Creating a Presentation from Your Word Document

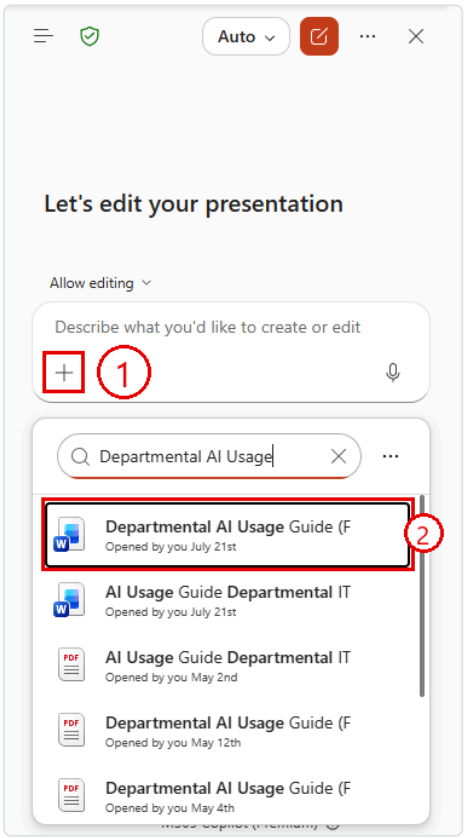
Once PowerPoint is open, look for the round Copilot button. On a blank presentation it floats in the bottom right corner of the screen.



The Copilot button appears in the bottom right corner of a blank presentation. Click it to open the Copilot panel.

Attaching your Word document

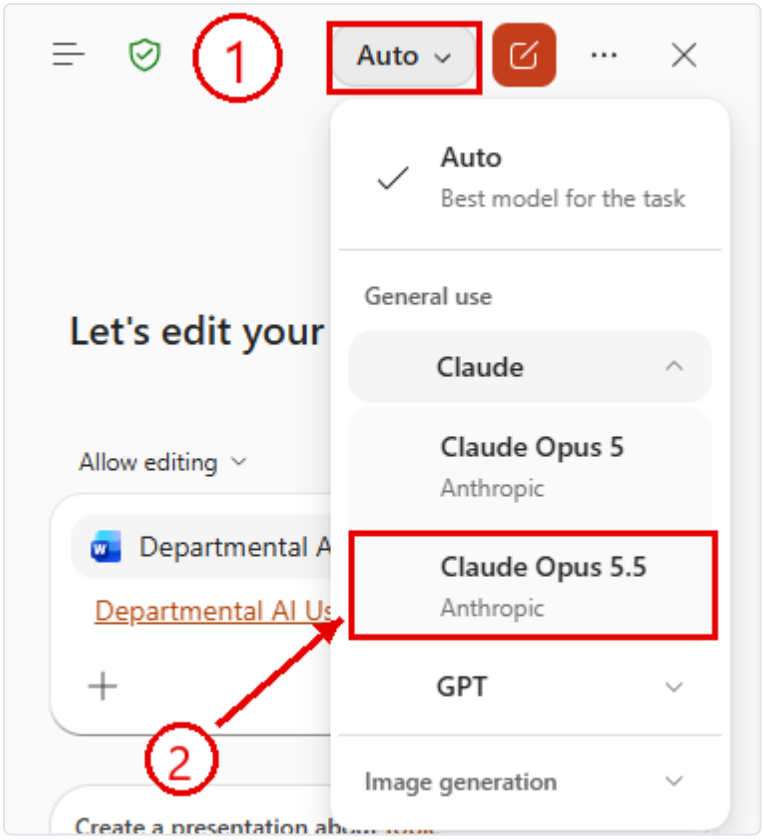
When the Copilot panel opens, click the **+** button and choose **Add work content** to attach your Word document as the source.



Click + → Add work content (callout 1) to open the file picker. Recent files appear automatically, or type in the search box to find yours. Select your AI Usage Guide Word document (callout 2). The + menu also offers Upload images and files, Designer, Select brand, Choose skills, and Change data sources.

Switching models before generating

Before you submit, you can switch the AI model using the model selector at the top of the panel.

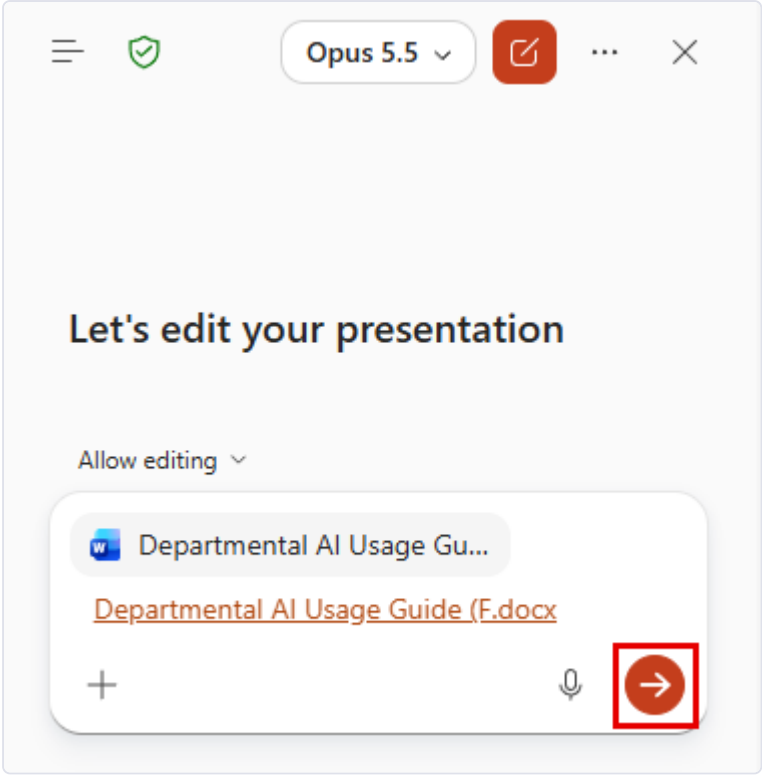


*Click Auto (callout 1) to open the model switcher, expand **Claude**, and pick **Claude Opus 5.5** (callout 2). Opus is recommended for presentation generation as it produces more structured and well-reasoned slide content. The menu also lists GPT models and an Image generation option.*

> **Note:** The Claude models may not be available on all tenants. If you do not see them, use Auto.

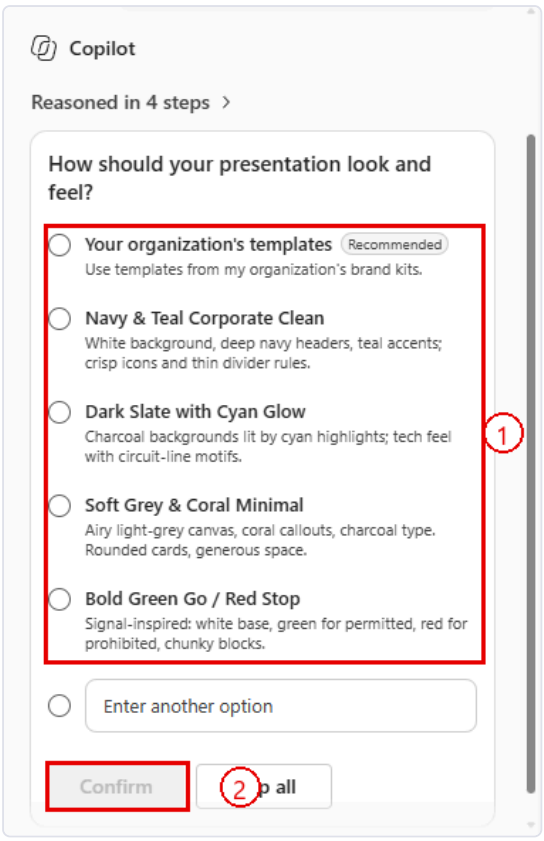
Submitting and generating

After attaching your document and selecting your model, click the arrow button to generate the presentation.



The Word document appears as an attachment in the panel, and the model button now shows Opus 5.5. Click the arrow button to start generating the presentation.

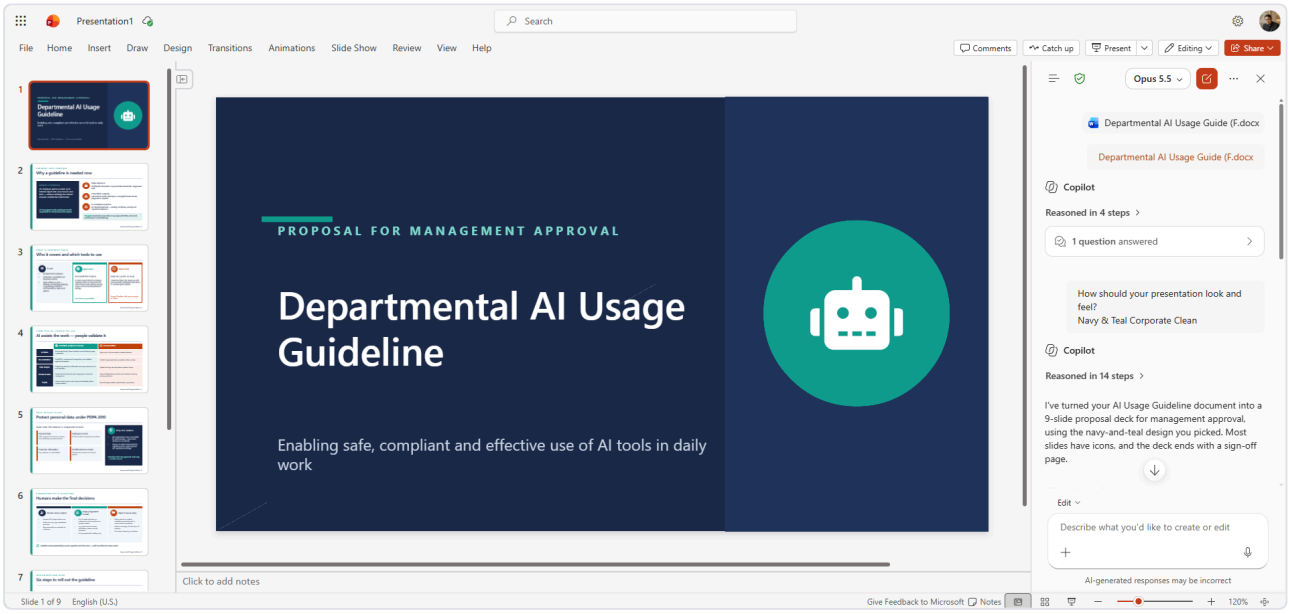
Copilot reads your entire Word document and first asks **how the presentation should look and feel**. Pick one of the suggested styles (or your organisation's templates, or type your own) and click **Confirm** — or click **Skip all** to let Copilot decide.



Callout 1: suggested looks, with your organisation's templates recommended first. Callout 2: Confirm your choice.

Copilot then builds a structured slide deck. This usually takes 2 to 4 minutes.

The completed presentation



A completed 9-slide presentation generated from the AI Usage Guide Word document in the Navy & Teal style. The Copilot panel on the right shows the style you chose and a summary of what Copilot built.

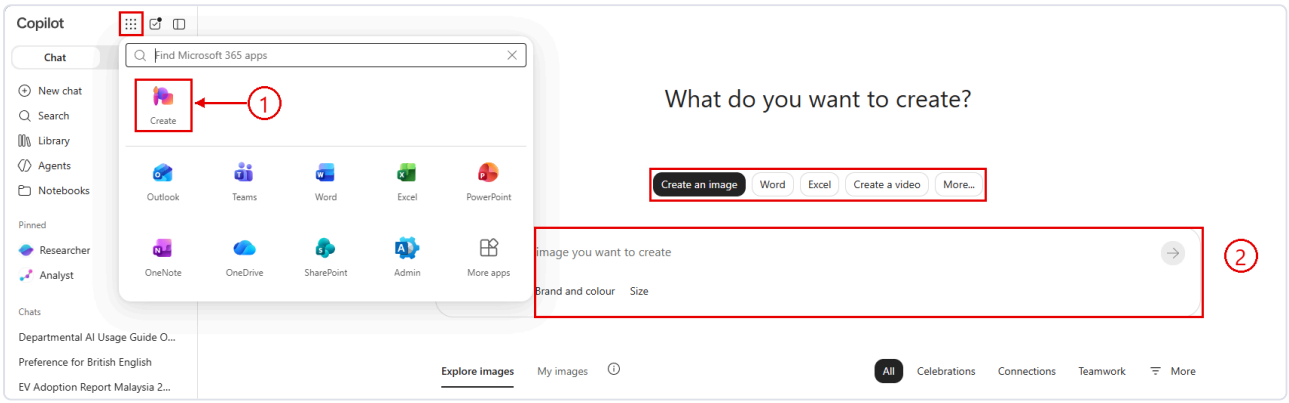
Workshop Scenario

You are turning the approved AI Usage Guide into a presentation for your department team. The audience is non-technical staff who are new to using AI at work. The goal is to help them understand the guideline, feel positive about it, and know exactly what is expected of them.

Create and Library in Copilot Chat

Alongside the presentation itself, Copilot Chat has two features worth knowing when building visual content for your slides: **Create** and **Library**.

Create — AI image generation



Callout 1: Create, opened from the apps grid (the dotted square next to the Copilot logo). Callout 2: the format tabs and the image description prompt box. The tabs let you switch between creating an image, a Word document, an Excel spreadsheet, a video, and more (under More...).

Create is opened from the apps grid at the top of the sidebar in Copilot Chat at m365.cloud.microsoft, or from the **+ Create** button in Library. It lets you generate images from a text description, which you can then insert into your PowerPoint slides.

Important — image generation uses a different model than chat. When you are chatting with Copilot, you can switch between Claude Opus, GPT, and other models. Image generation does not use those models. It uses OpenAI's **GPT-Image-1.5**, which is a dedicated image generation model separate from the chat models. Switching your chat model to Opus does not affect how images are generated.

Example prompts for image generation:

```
A professional office team collaborating around a laptop,
modern Malaysian corporate setting, natural lighting,
photorealistic style.
```

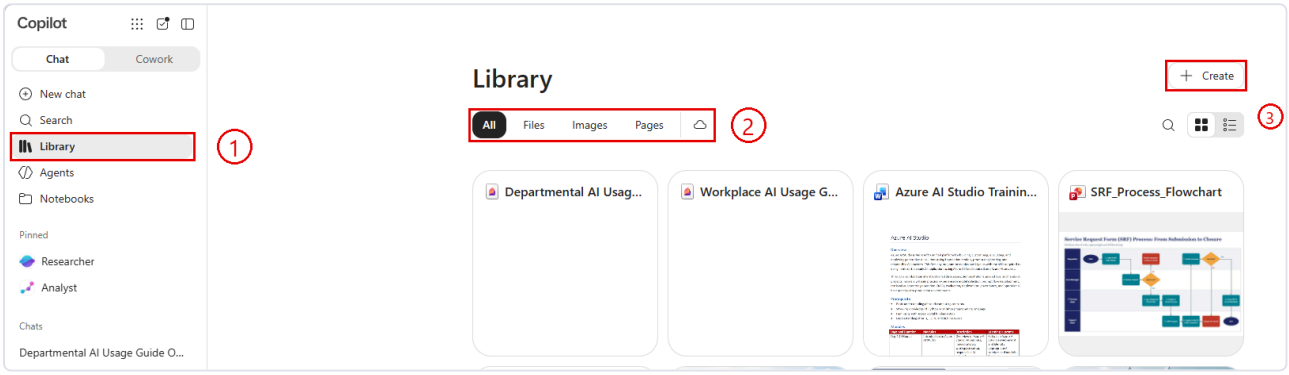
```
A simple infographic-style illustration showing a shield
icon representing data privacy, blue and teal colour scheme,
clean minimal style, no text.
```

```
A split image showing two scenarios side by side: on the
left, a stressed employee with piles of paper; on the right,
the same employee relaxed at a clean desk using a laptop.
Corporate illustration style.
```

```
A flowchart diagram showing an AI decision process with
diamond decision nodes and rectangular action nodes,
teal and navy colour scheme, white background.
```

> **Tip for presentations:** Generate images in a wide (16:9) format to match standard PowerPoint slide dimensions. Use the **Size** option below the prompt box to set this before generating.

Library — your saved images and prompts



Callout 1: Library in the left sidebar. Callout 2: filter by All, Files, Images, or Pages. Callout 3: the + Create button. Your generated images, files, and Pages are stored here and accessible across sessions.

Library stores all images you have generated through Create, as well as any prompts you have saved from Copilot Chat. It is accessible from the left sidebar at any time. Images are stored for 18 months before being automatically deleted.

Use Library to:

- Find images you generated in a previous session without regenerating them
- Access saved prompts from Topic 02 exercises
- Reuse visuals across multiple presentations or documents

Why Copilot-generated slides don't work with templates

When Copilot builds a presentation, it places content using text boxes rather than PowerPoint's built-in layouts and placeholders. The slides look fine on screen, but when you apply a corporate template, nothing snaps into place. Fonts, colours, and positioning all have to be fixed manually because the slide structure doesn't match what the template expects.

The way around this is to use PowerPoint VBA to build the presentation instead. VBA can create slides using proper layouts, fill real placeholders, insert native charts and tables, and respect the active theme. The result is a presentation that works correctly with any template from the start.

The prompt in Part 5 walks you through this with a step-by-step workflow: you describe your presentation to an AI assistant, it produces a slide-by-slide blueprint for you to review, and only after you approve the outline does it generate the VBA code. You then paste that code into PowerPoint and run it.

> **Note:** This approach works in PowerPoint 365 desktop. You will need to enable the Developer tab to access the VBA editor. Go to File > Options > Customise Ribbon and check the Developer box.

Tips for Copilot in PowerPoint

- The better your Word document, the better the generated presentation. Clean headings and clear sections in Word translate directly into well-structured slides.
- Copilot will apply your organisation's PowerPoint template if one is set up in your Microsoft 365 tenant. If not, you can apply a theme after generating.
- Speaker notes are often the most valuable output. Even if you adjust the slides manually, keep the notes as a script reference when presenting.
- Use **Design Suggestions** (also in the ribbon under Copilot) alongside the Copilot panel to improve visual layout after the content is generated.
- If you are not happy with the first result, you can ask Copilot to regenerate with different instructions rather than starting over.

HANDS-ON

Hands-on exercises

Use these prompts to build your team presentation from the approved AI Usage Guide.

> **Session guide:** All prompts in this topic are used inside PowerPoint. Use the **Copilot panel** (the round Copilot button at the bottom right) for generating and editing the presentation. Attach your Word document from Topic 05 as the source before submitting Part 1.

Part 1 — Generate the presentation from your Word document

Attach your AI Usage Guide Word document first using + → Add work content in the Copilot panel, then submit this prompt.

```
Create a presentation from this AI Usage Guide proposal.
The audience is my department team — non-technical staff
who are new to using AI at work.

Structure:
1. Title slide with a tagline
2. Why we created this guideline (1 slide)
3. What AI tools are approved for use (1 slide)
4. Key dos and don'ts (1 to 2 slides)
5. Data privacy: what to watch out for (1 slide)
6. How this helps your daily work with 3 concrete examples (1 slide)
7. What happens next and where to get help (1 slide)
8. Q and A slide

Add speaker notes to every slide with talking points I
can use when presenting to a non-technical audience.
```

Part 2 — Add an opening scenario slide

```
Add a slide after the title slide that opens with a
short scenario: "Imagine it is Monday morning and you
have 3 reports to write before lunch..."

Use this scenario to show the practical benefit of AI
before getting into the guideline content. Keep it to
3 to 4 bullet points maximum. Conversational tone.
```

Part 3 — Fix slides with too much text

```
The Dos and Don'ts slide has too much text. Break it
into two slides. Use short phrases, not full sentences.
Keep each bullet to 8 words or less.
```

Part 4 — Add a Copilot free vs paid comparison slide

```
Add a slide that compares free Microsoft Copilot versus
paid Microsoft 365 Copilot using a simple side-by-side
layout. Show 3 key differences only. Keep the labels
short and clear for a non-technical audience.
```

Part 5 — Build a template-ready presentation using VBA

Session: new chat in your preferred AI assistant (Copilot, Claude, or ChatGPT) | No grounding needed

Copilot in PowerPoint generates slides using text boxes, which means corporate templates won't apply cleanly. This exercise uses a structured master prompt to get an AI assistant to design your presentation first, then generate PowerPoint VBA code that builds the slides using real layouts and placeholders.

How to use this prompt:

1. Open a new chat in any AI assistant
2. Paste the short opening prompt, followed by the master prompt below it
3. The assistant will ask you for a presentation brief before doing anything else
4. Answer its questions, review the slide blueprint it produces, approve or adjust it, then wait for the VBA code
5. In PowerPoint, press `Alt + F11` to open the VBA editor
6. Go to Insert > Module, paste the code, then press `F5` or click Run

Short opening prompt — paste this first, then paste the master prompt directly below it:

```
Use the workflow below to help me build a PowerPoint 365
presentation using VBA, layouts, placeholders, and native
PowerPoint charts. Do not generate the VBA until you have
created the outline and I have approved it.
```

Master prompt — paste this immediately after the opening prompt above:

```
# Role
You are a PowerPoint 365 presentation architect and VBA
automation specialist.

# Goal
Help me create a PowerPoint presentation from a prompt,
but do not directly generate a .pptx file. Instead, help
me design the presentation first, then generate PowerPoint
VBA code that builds the slides using PowerPoint layouts,
placeholders, native charts, native tables, and the active
presentation theme.

# Important Principle
Do not create slides by randomly placing text boxes unless
there is no suitable placeholder or layout available.
Prioritise:
1. Slide Master
2. Custom Layouts
```

```
3. Placeholders
4. Native PowerPoint charts
5. Native PowerPoint tables
6. Manual shapes only as a fallback

# Workflow

## Step 1: Ask me for the presentation brief
Before doing anything else, ask me for the following:
- Presentation topic
- Target audience
- Purpose of the presentation
- Duration or number of slides
- Tone and style
- Key message
- Whether I need charts, tables, diagrams, or speaker notes
- Whether I have any data to include

Do not proceed until I provide the brief.

## Step 2: Ask whether I want to use default layouts or a custom template
Ask me:
"Do you want to use:
1. Default PowerPoint layouts, or
2. A custom PowerPoint template?"

If I choose default layouts, proceed using common PowerPoint
layouts such as:
- Title Slide
- Title and Content
- Section Header
- Two Content
- Comparison
- Title Only
- Blank

If I choose custom template, ask me to upload the .pptx
template.

## Step 3: If I upload a template, analyse it first
When I upload a .pptx template, inspect the Slide Master,
Custom Layouts, and placeholders. Extract and show me a
template map with:
- Layout number
- Layout name
- Suggested use case
- Placeholder index
- Placeholder type
- Placeholder name, if available
- Placeholder position and size
- Notes on whether the layout is suitable for title slides,
  content slides, chart slides, comparison slides, section
  dividers, or summary slides

Also tell me if the template uses real placeholders or normal
text boxes that only look like placeholders.

## Step 4: Create a presentation blueprint
```

```
Before generating VBA, produce a slide-by-slide outline
using this table format:

| Slide | Slide Title | Purpose | Key Message | Recommended Layout | Placeholder Usage |
Visual / Chart Recommendation |

For each slide:
- Choose the most suitable layout
- Explain the intended use of each placeholder
- Recommend charts only when they support the message
- Use native PowerPoint charts where charts are needed
- Recommend suitable chart types based on the analytical purpose

Chart selection rules:
- Use column or bar charts for category comparison
- Use line charts for trends over time
- Use stacked charts for composition
- Use scatter charts for relationships
- Use tables for precise values
- Use process diagrams for workflows
- Use timelines for roadmaps
- Avoid pie charts unless there are very few categories and
  the purpose is part-to-whole comparison

## Step 5: Wait for my approval
After showing the presentation blueprint, ask me whether
I want to:
1. Approve the outline
2. Modify the slide flow
3. Change the layout choices
4. Add or remove slides
5. Change the chart recommendations

Do not generate VBA code until I approve the outline.

## Step 6: Generate PowerPoint VBA code
After I approve the outline, generate complete PowerPoint
VBA code that I can paste into the PowerPoint VBA editor.

The VBA code must:
- Use the active PowerPoint presentation
- Add slides using the selected layouts
- Fill placeholders with the planned content
- Use native PowerPoint charts where needed
- Use native PowerPoint tables where needed
- Add speaker notes if requested
- Respect the active theme, fonts, and colours
- Avoid excessive manual positioning
- Include comments explaining each major section
- Include basic error handling
- Include helper functions where useful

The VBA should be designed for PowerPoint 365 desktop.

## Step 7: Explain how to run the macro
After the VBA code, provide brief instructions:
- Open PowerPoint
- Open the template or target presentation
```

```
- Press Alt + F11
- Insert a new module
- Paste the code
- Run the main macro

# Output Rule
Do not skip the planning stages. Start by asking me for
the presentation brief.
```

Part 6 — Improve speaker notes

```
Rewrite the speaker notes for the Dos and Don'ts slide.
I want to be able to explain the reasoning behind each
point verbally, with one real-world example I can share
with the team.
```

```
The speaker notes for the Data Privacy slide are too
technical. Rewrite them so I can explain the key point
in 2 minutes to staff with no IT background. Use plain
language and avoid acronyms where possible.
```

```
Add speaker notes to the Q and A slide with 5 questions
the audience is likely to ask, and a suggested answer
for each one.
```

Part 7 — Adjust tone and slide titles

```
The slide titles feel too formal and policy-like.
Rewrite all slide titles to sound more conversational
and engaging while still being professional. The team
should feel motivated, not like they are reading a
compliance document.
```

Part 8 — Suggest a visual theme

```
Suggest a colour theme for this presentation that feels
modern and professional, suitable for a Malaysian
corporate environment. Describe the colours and the
rationale for choosing them.
```

Part 9 — Summarise before presenting

Open your completed presentation and run this in the Copilot panel before your session:

```
Summarise this presentation in 5 bullet points. What
are the 3 things the audience must walk away knowing?
```

```
What questions is the audience most likely to ask after
this presentation? Give me the top 5 with suggested answers.
```

Part 10 — Generate images for your slides using Create

Use Create in Copilot Chat (apps grid at the top of the sidebar at m365.cloud.microsoft, or + Create in Library), not inside PowerPoint.

> **Note:** Image generation uses OpenAI's GPT-Image-1.5 model, which is separate from the chat models. Switching to Claude Opus or GPT in the chat panel does not affect image generation. Set the image shape to **Wide** (16:9) before generating so it matches your slide dimensions.

```
A professional office team collaborating around a laptop,
modern Malaysian corporate setting, natural lighting,
photorealistic style.
```

```
A simple illustration showing a shield icon representing
data privacy, blue and teal colour scheme, clean minimal
style, suitable for a corporate presentation slide.
```

```
A split image showing two scenarios side by side: on the
left, a stressed employee surrounded by paper and looking
overwhelmed; on the right, the same employee relaxed at a
clean desk using a laptop with AI assistance. Corporate
illustration style.
```

```
An abstract illustration representing human oversight of AI:
a human hand guiding a robot hand, professional corporate
style, teal and navy colour scheme, no text.
```

Once generated, save the image from Library and insert it into your PowerPoint slide using Insert > Pictures > This Device.

Part 11 — Final check

```
Review this entire presentation as if you are a
non-technical employee seeing it for the first time.
What is unclear, missing, or likely to confuse the
audience? List your findings with suggested fixes.
```

08

CHAPTER 8

Copilot in Forms

Your AI Usage Guideline has been presented to the team. Now you want to know two things: do they understand it, and is it actually useful? Copilot in Forms lets you build both a knowledge quiz and a feedback survey from your guideline document in minutes.

Continuing from Topic 07

You have the approved AI Usage Guide as a Word document and a PDF export. In this topic you will feed that document into Copilot in Forms to generate two things:

1. A **knowledge quiz** to check whether staff have understood the key rules
2. A **feedback survey** to find out whether the guideline is practical and clear

The responses you collect will be exported to Excel and analysed in Topic 09. You do not need to wait for real responses — the workshop sample dataset is pre-populated and ready to use.

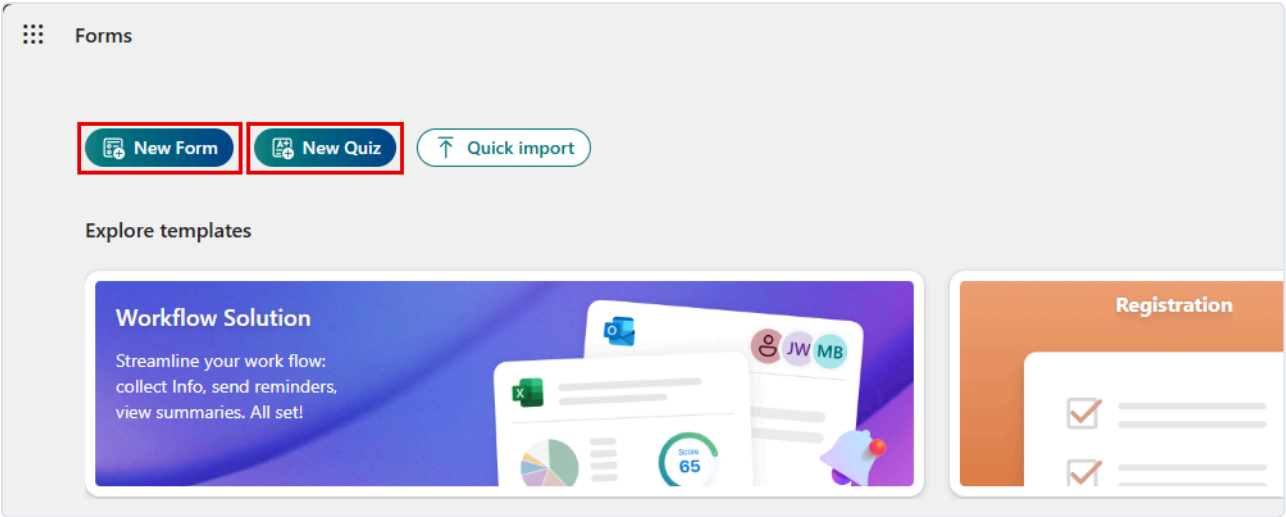
> **Before you start:** Make sure your AI Usage Guide is saved to your OneDrive. Copilot in Forms pulls files directly from your Microsoft 365 account. If you only have it on your desktop, upload it to OneDrive first.

What Copilot Can Do in Forms

- Generate a complete form or quiz from a document or text prompt
- Suggest question types (multiple choice, rating scale, Likert, open text)
- Recommend improvements to your form after generation
- Help you phrase questions clearly and without bias
- Distribute the form via link, QR code, or email

Getting Started: The Forms Home Screen

Access Microsoft Forms at forms.cloud.microsoft.

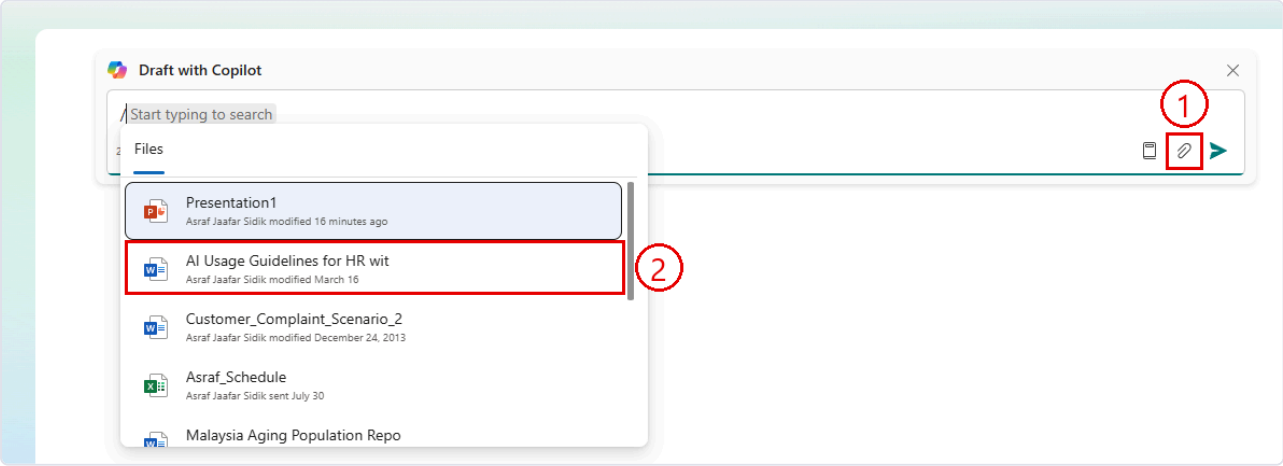


*The Forms home screen. Click **New Form** to create a feedback survey or **New Quiz** to create a scored knowledge check. Quick import lets you import questions from an existing file, and Explore templates offers ready-made starting points.*

For this workshop you will use **New Quiz** for the knowledge check and a separate **New Form** for the feedback survey.

Step 1: Attach Your AI Usage Guide

When the form or quiz editor opens, the **Draft with Copilot** box appears at the top. Click the paperclip to attach your document, then describe what you want (see prompts.md) and click the send arrow.



Callout 1: the paperclip icon to attach a file from your Microsoft 365 account. Callout 2: your AI Usage Guide document in the file list (type after the / to search). Select it as the source for Copilot to generate questions from.

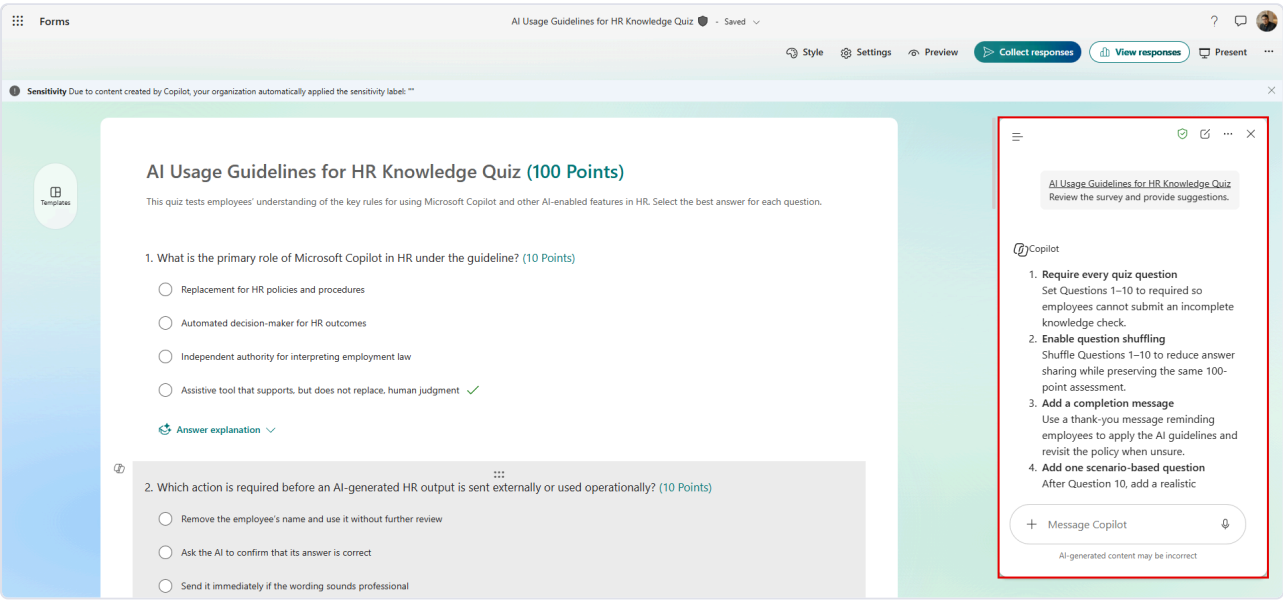
Step 2: Review the Generated Form

Copilot first shows the draft questions in a preview ("Remove the questions you don't want"), with the correct answers ticked and answer explanations included. At the bottom of the preview, you can keep the draft, regenerate it, delete it, or refine it.



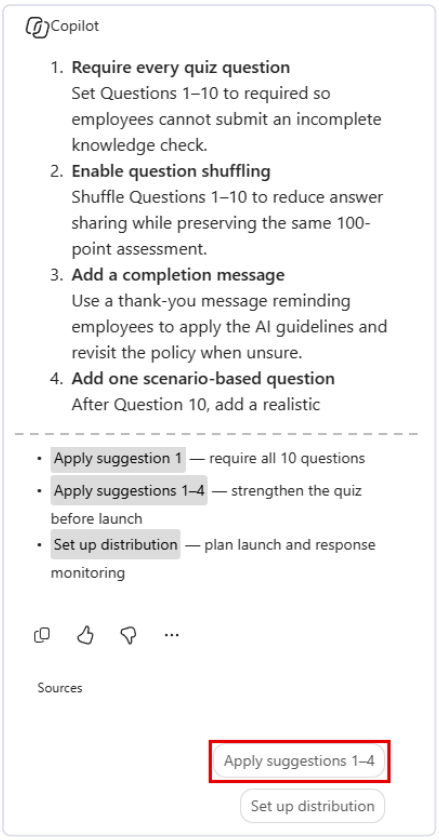
Callout 1: Keep and continue with Copilot. Callout 2: regenerate. Callout 3: delete the draft. Callout 4: add more details for Copilot to fine-tune the draft.

When you click **Keep and continue with Copilot**, the questions are added to your form and a Copilot panel opens on the right. Copilot automatically reviews the form and lists suggestions to improve it.



The kept quiz on the left, and Copilot's review suggestions in the panel on the right.

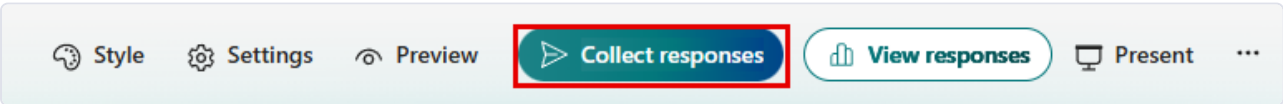
Step 3: Review and Apply Suggestions



*Copilot's suggestions for the form. In this example it recommends requiring every question, shuffling questions, adding a completion message, and adding a scenario-based question. Click **Apply suggestions 1–4** to apply them all, or type in the Copilot box to apply only the ones you want. **Set up distribution** helps you plan the launch.*

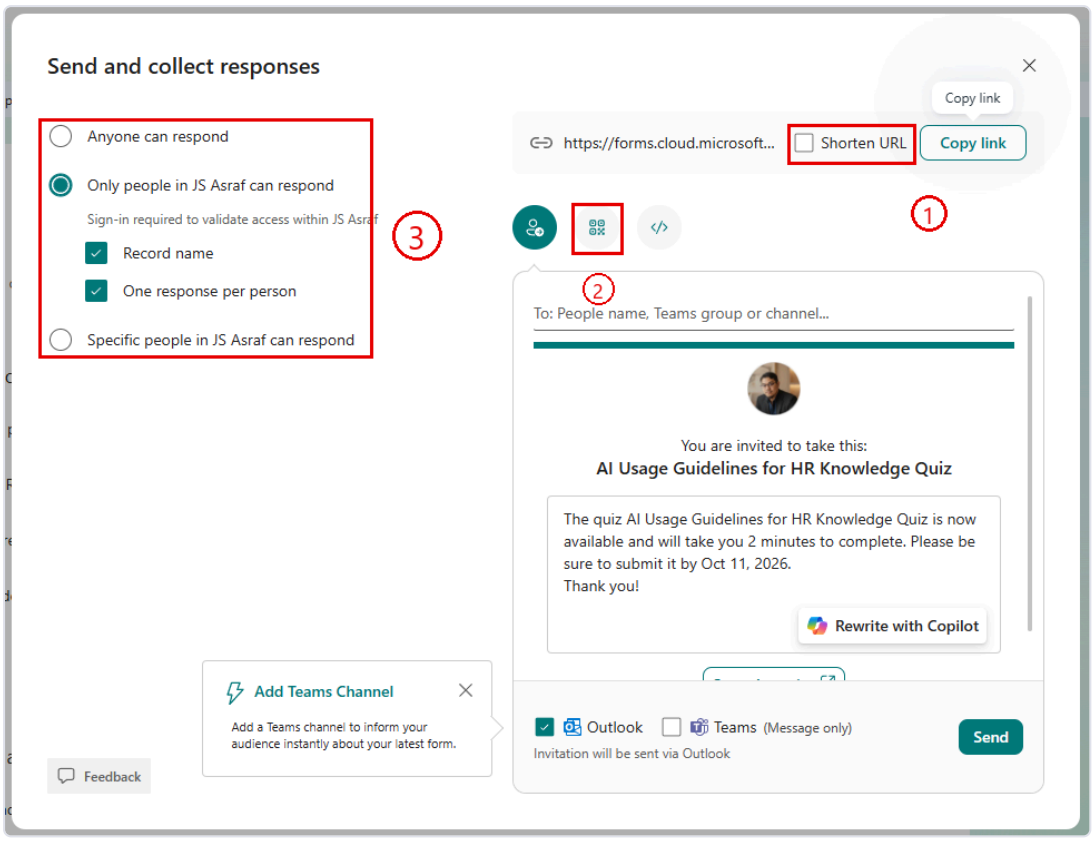
Step 4: Collect Responses

Once you are satisfied with the form, click **Collect responses** in the top bar.



The Collect responses button in the top bar of the form editor.

This opens the distribution panel where you can configure how responses are collected.

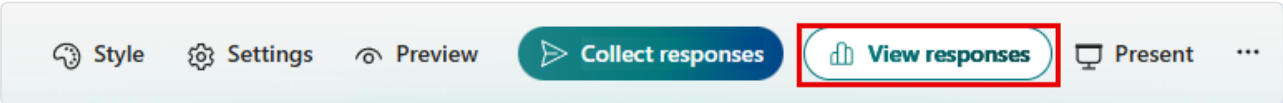


The Send and collect responses panel:

- *Callout 1: **Shorten URL** gives you a compact link to share via email, Teams, or chat*
- *Callout 2: **QR code** — download and display it during your presentation so participants can respond immediately on their phones*
- *Callout 3: **Access control** — choose between anyone, only people in your organisation, or specific people. For a staff knowledge check, set it to your organisation only and enable "Record name" so you know who has completed it*

Step 5: View Responses

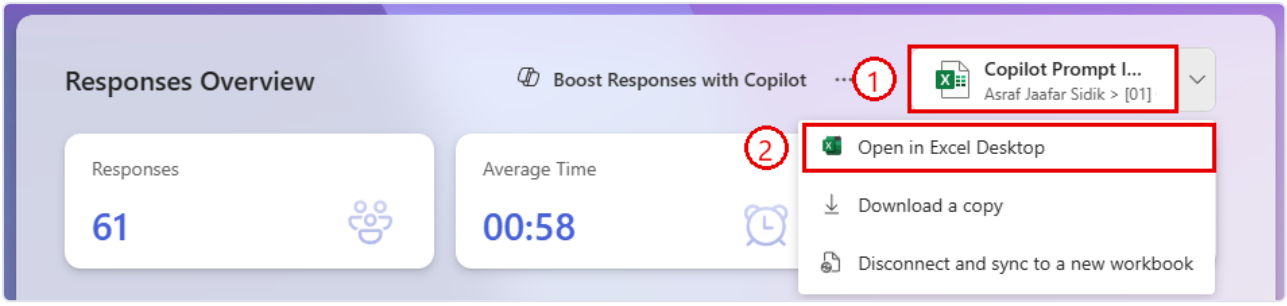
After responses come in, click **View responses** in the top bar.



Click View responses (top bar) to see the Responses Overview — a live summary of all responses as they come in, with Back to questions to return to the editor.

Step 6: Export to Excel for Topic 09

This step is important. The Excel file you export here is what you will use for analysis in Topic 09.



At the top right of the Responses Overview, your responses are already linked to an Excel workbook (callout 1) — click it to open the results in Excel for the web. Use the drop-down arrow for Open in Excel Desktop (callout 2), Download a copy, or Disconnect and sync to a new workbook.

Where to find the Excel file after exporting:

Microsoft Forms keeps the linked workbook in your **OneDrive**. The file is named after your form title, and the folder it lives in is shown under the file name on the Excel card. Clicking the card opens it immediately in Excel for the web.

To find it later:

1. Go to onedrive.live.com or open OneDrive from the Microsoft 365 app launcher
2. Search for your form title, or open the folder shown on the Excel card
3. Look for a file with your form title ending in `.xlsx`

> **Download:** **AI_Guideline_Survey_Responses.xlsx** if you do not have real responses yet. It contains 100 simulated responses across 8 departments and is ready to use in Topic 09.

Tips for Copilot in Forms

- Generating from a document gives much better and more specific questions than generating from a text prompt alone. Always attach the source document.
- If Copilot generates questions that are too technical for your audience, ask it to simplify the language before keeping the draft.
- For a knowledge quiz, set the correct answers after generating. Copilot generates the questions and options but does not always mark the correct answer.
- Use the QR code option when presenting live so participants can respond on their phones immediately after the session.
- The Excel export updates automatically as new responses come in. You do not need to re-export every time.

HANDS-ON

Hands-on exercises

Use these prompts to build a knowledge quiz and feedback survey from your AI Usage Guide.

> **Session guide:** All prompts in this topic are used inside Microsoft Forms at forms.cloud.microsoft. Attach your AI Usage Guide document before submitting any prompt. Parts 1 to 4 build the knowledge quiz. Parts 5 to 7 build the feedback survey. These are two separate forms.

> **Before you start:** Make sure your AI Usage Guide is saved to OneDrive so Copilot in Forms can find it. If it is only on your desktop, upload it to OneDrive first.

Part 1 — Generate the knowledge quiz

Click New Quiz on the Forms home screen, then click Draft with Copilot. Attach your AI Usage Guide using the paperclip icon, then submit this prompt.

```
Using the attached AI Usage Guide, create a knowledge quiz
to test whether employees have understood the key rules.

Include:
- 8 to 10 multiple choice questions
- Questions covering: approved tools, dos and don'ts,
  data privacy and PDPA, human review requirements,
  and how to report issues
- 4 answer options per question with only one correct answer
- A mix of straightforward recall questions and
  scenario-based questions where the employee must
  decide what to do

Keep the language clear and suitable for non-technical staff.
```

If you want to regenerate with a different focus:

```
Regenerate the quiz with more scenario-based questions.
Each question should describe a real workplace situation
and ask the employee what the correct action is according
to the AI Usage Guide.
```

Part 2 — Refine the quiz questions

Use the refinement bar at the bottom of the draft to fine-tune before keeping.

```
The questions are too straightforward. Make 3 of them
harder by adding plausible wrong answers that employees
might genuinely be unsure about.
```

```
Simplify the language on questions 4, 6, and 8.
Some employees have no technical background and may
not understand terms like PDPA or data classification
without a short explanation in the question itself.
```

```
Add an introductory description to the quiz explaining
its purpose. Keep it under 50 words. The tone should
be encouraging, not threatening.
```

Part 3 — Set correct answers and scoring

After keeping the draft, review each question and mark the correct answer:

1. Click any question to edit it
2. Check that the correct answer is marked with a tick (Copilot usually marks it for you; click the tick next to an option to change it)
3. Assign a point value (suggested: 1 point per question)
4. Optionally add a feedback message for correct and incorrect answers

```
For each question, suggest a one-sentence feedback message
that explains why the correct answer is right. Write it
in a way that reinforces the key rule from the guideline
rather than just saying "correct" or "incorrect".
```

Part 4 — Configure and distribute the quiz

Once the quiz is ready:

1. Click **Collect responses** in the top bar
2. Set access to **Only people in your organisation** and enable **Record name**
3. Enable **One response per person** to prevent duplicate submissions
4. Copy the link or download the QR code to share with your team

> **Tip:** Display the QR code on your presentation slide at the end of your team session so participants can complete the quiz on their phones immediately after.

Part 5 — Generate the feedback survey

Go back to the Forms home screen, click New Form, then Draft with Copilot. Attach your AI Usage Guide again and submit this prompt.

```
Using the attached AI Usage Guide, create a feedback survey
to find out how useful and practical employees find the guideline.

Include:
- A 1 to 5 rating scale for overall clarity of the guideline
- A 1 to 5 rating scale for how confident employees feel
  using AI tools after reading it
```

```
- A Net Promoter Score question (0 to 10):
  "How likely are you to recommend this guideline to a
  colleague in another department?"
- A question asking which section was most useful
- A question asking which section was hardest to understand
- Two open-ended questions asking for specific improvement
  suggestions
- A question about how often they expect to reference
  the guideline

10 to 12 questions total. Mix of question types.
```

Part 6 — Add a survey introduction

```
Write a short introduction for this survey. Include:
- What the survey is for
- How long it takes (estimate 3 to 5 minutes)
- That responses are anonymous
- Who will see the results and how they will be used

Keep it under 60 words. Friendly and encouraging tone.
```

Part 7 — Improve specific questions

```
The open-ended questions are too vague. Rewrite them to
be more specific so employees give actionable feedback
rather than general comments.

For example, instead of "What could be improved?",
ask something like "If you could change one thing about
the Dos and Don'ts section, what would it be and why?"
```

```
Add a question asking which Microsoft 365 Copilot app
the employee uses most often for their daily work.
Use a multiple choice format with: Word, Excel, Outlook,
PowerPoint, Teams, Copilot Chat, and Other as options.
Allow multiple selections.
```

Part 8 — Export responses to Excel

After the survey has collected responses:

1. Click **View responses** in the top bar
2. At the top right of the Responses Overview, click the linked Excel workbook card to open your results in Excel
3. The Excel file is kept in your **OneDrive** — the folder is shown under the file name on the card
4. The file is named after your form title

> **Find it later:** Go to OneDrive and search for the `.xlsx` file matching your form name. This file updates automatically as new responses come in — you do not need to re-export.

> **For the workshop:** If you do not have real responses, use `AI_Guideline_Survey_Responses.xlsx` from the `09-copilot-excel` folder in the workshop GitHub repo. It has 100 pre-populated responses ready for analysis in Topic 09.

09

CHAPTER 9

Copilot in Excel

You have quiz response data from Topic 08. Now you will use Copilot in Excel to analyse it, clean it, spot patterns, and even run Python code — all through natural language prompts.

Continuing from Topic 08

At the end of Topic 08 you exported your Forms responses as an Excel file saved to OneDrive. Open that file now in Microsoft Excel (desktop app, not browser) to get full Copilot functionality.

If you do not have real response data: download the sample file below and open it in Excel. It contains 100 simulated quiz responses across 8 departments with realistic Malaysian names and varied correct/incorrect answer patterns.

> **Download:** AI_Guideline_Survey_Responses.xlsx, then open it in the Excel desktop app.

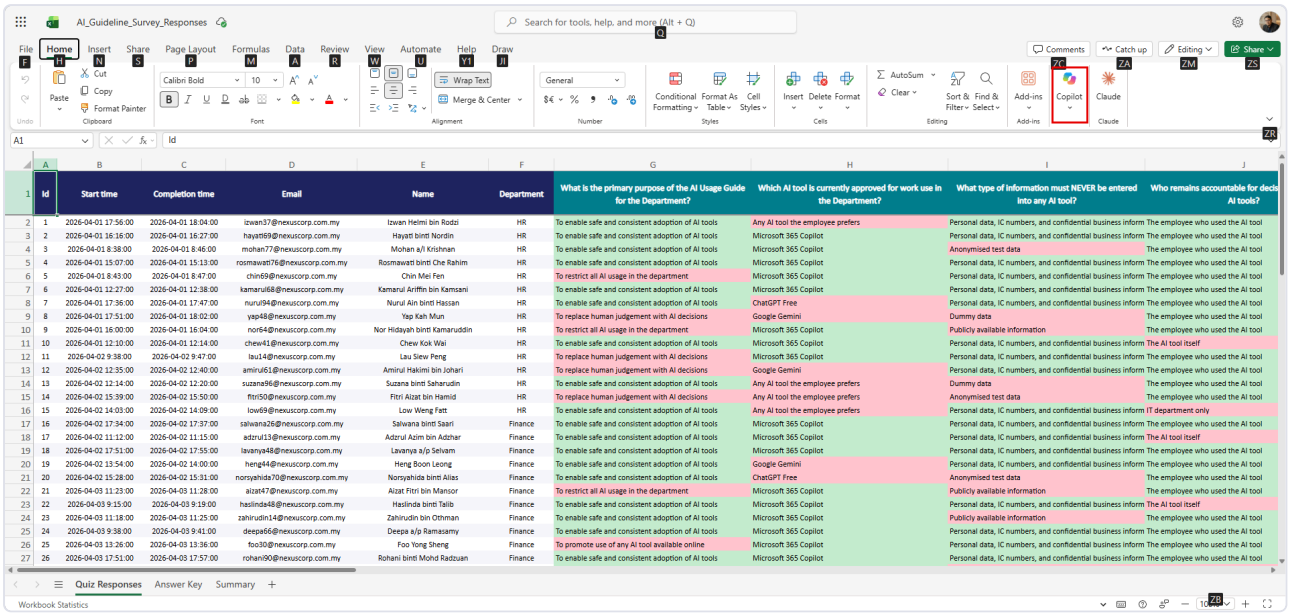
The workbook has 3 sheets:

- **Quiz Responses:** 100 rows of quiz answers. Green cells are correct, red cells are incorrect.
- **Answer Key:** the correct answer for each of the 20 questions.
- **Summary:** pre-built stats by department and question accuracy.

What Copilot Can Do in Excel

- Analyse data and surface key insights in plain language
- Create PivotTables and charts from a natural language description
- Write and explain formulas
- Add new columns with calculated values
- Highlight patterns, outliers, and trends
- Generate a full summary report in a new sheet
- Run Python code for advanced analysis and visualisation

Opening Copilot in Excel

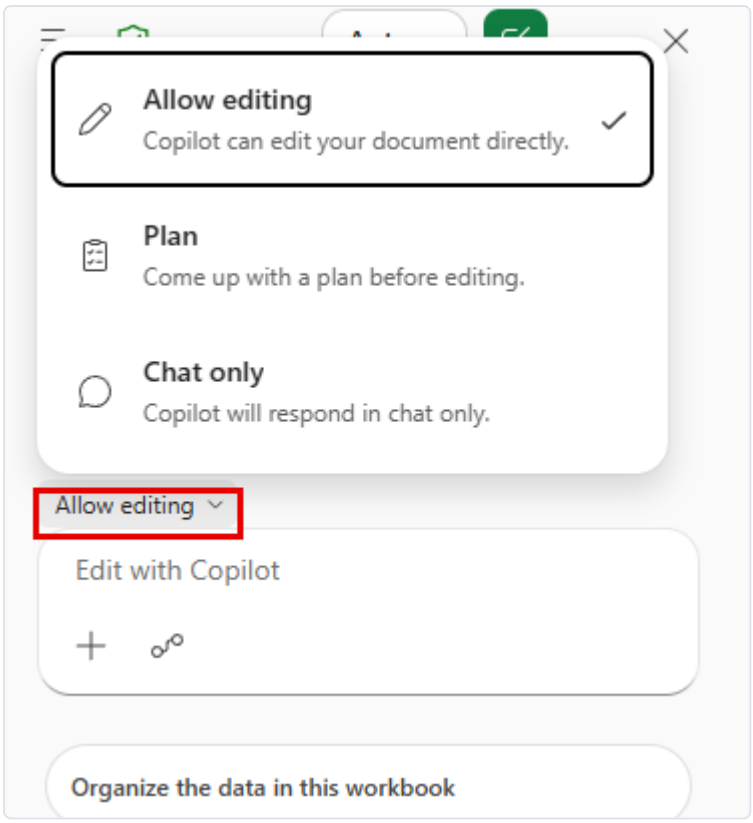


The AI_Guideline_Survey_Responses workbook open in Excel for the web. The Quiz Responses sheet shows 100 rows with green (correct) and red (incorrect) answer colour coding. The Copilot button is highlighted on the Home tab.

Open Copilot from the **Copilot** button on the **Home** tab of the ribbon. The Copilot panel ("Let's edit your workbook") opens on the right side of the screen. If it opens on an earlier conversation, click the new chat icon at the top of the panel.

Allow Editing, Plan, and Chat Only

When the Copilot panel opens, click the mode drop-down (it shows **Allow editing** by default) just above the Copilot box to choose how much Copilot can change.



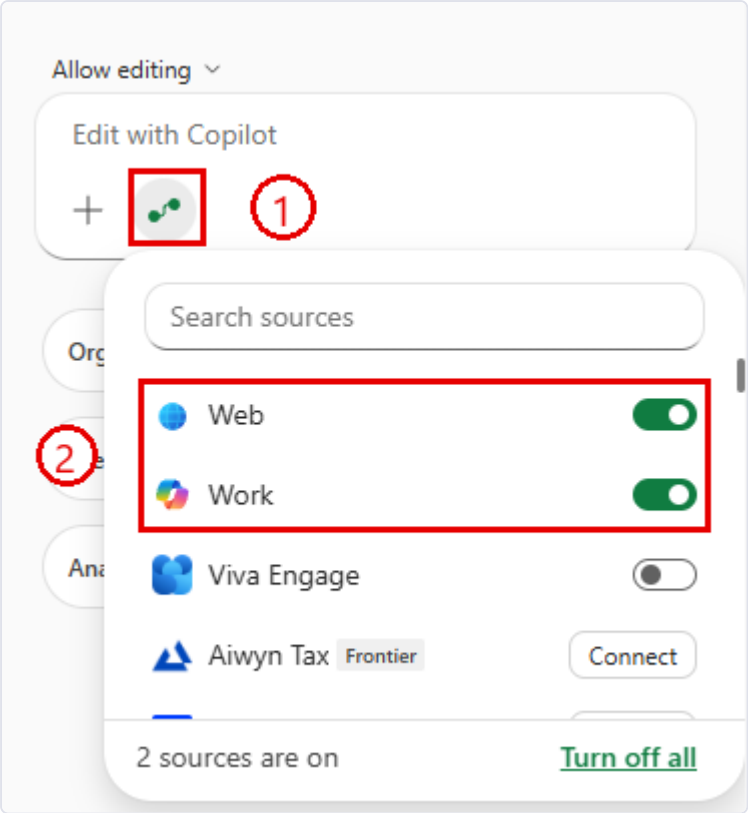
Allow editing lets Copilot make changes directly to your workbook. Plan has Copilot propose a plan before it edits anything. Chat only keeps Copilot responses in the panel without touching the spreadsheet.

Mode	What it does	Use when
Allow editing	Copilot can add columns, create sheets, insert charts, and write formulas directly into the workbook	You want Copilot to do the work for you
Plan	Copilot comes up with a step-by-step plan for you to review before it edits	You want to check Copilot's approach before it changes a workbook
Chat only	Copilot responds in the panel but does not change the workbook	You want to ask questions or get explanations without modifying anything

For most exercises in this topic, use **Allow editing**.

Sources: Web, Work, and connectors

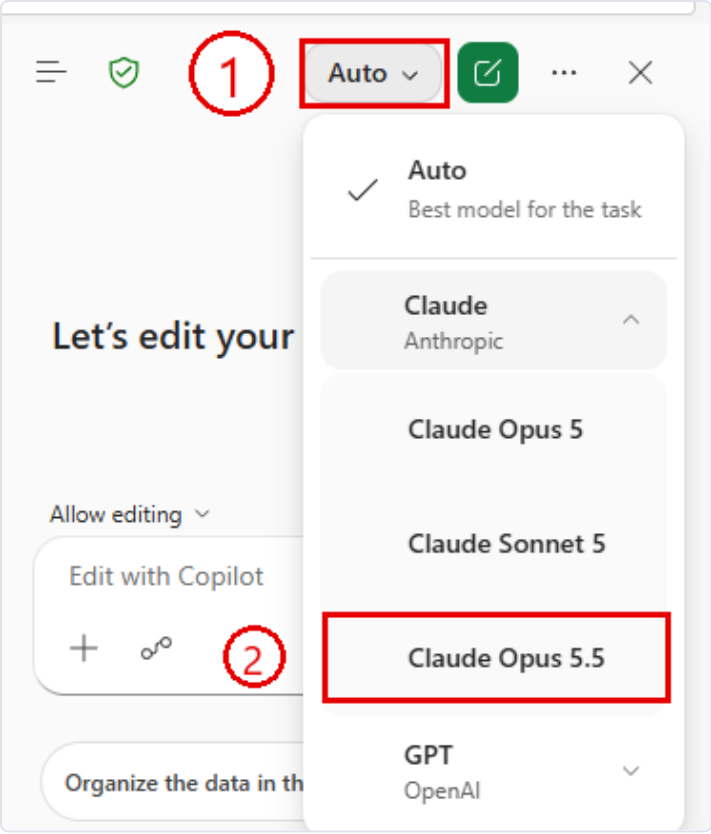
Click the sources icon (next to + in the Copilot box) to see what Copilot can access.



Callout 1: the sources icon. Callout 2: the Web (search the internet) and Work (your Microsoft 365 data) toggles. Below them are any connectors your organisation has enabled. There is no separate Python Tool toggle any more — for Exercise 4, simply ask Copilot to use Python in your prompt.

Switching Models

Click the model button (Auto by default) at the top of the Copilot panel to switch models.



Click Auto (callout 1), expand Claude, and choose Claude Opus 5.5 (callout 2). For data analysis and insight generation, Opus tends to produce more thorough and better-reasoned analysis than the default Auto model.

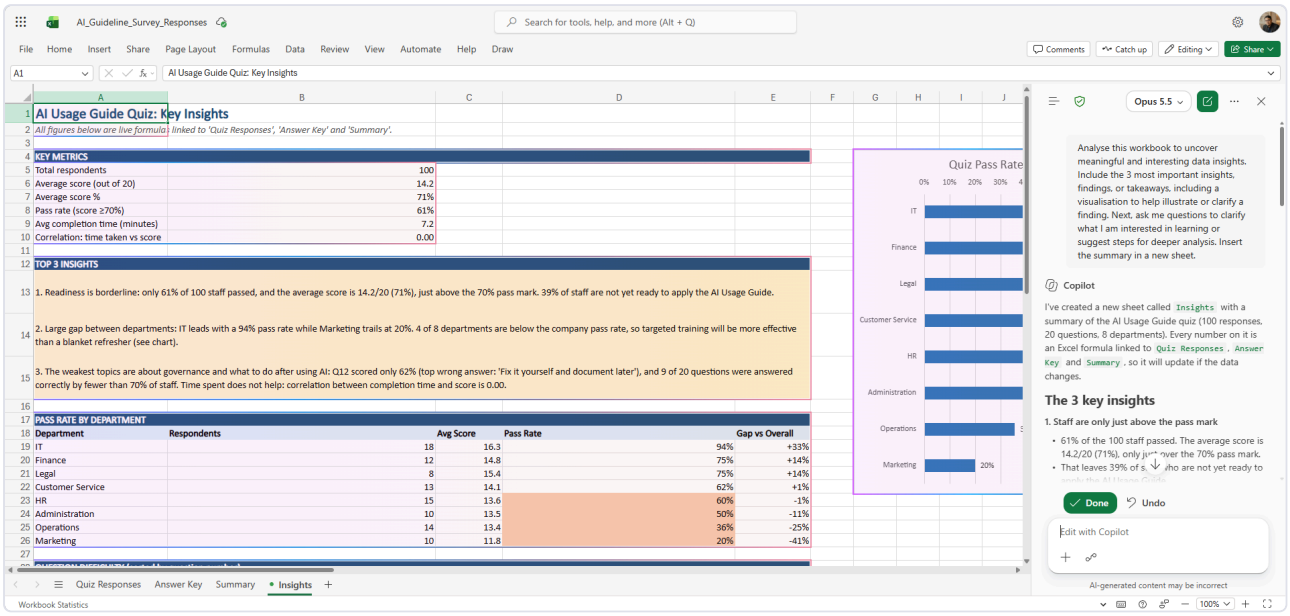
Workshop Exercises

This topic has four exercises. Each builds on the previous one. Work through them in order.

Exercise 1: Generate insights and an insights dashboard from the quiz data.
Exercise 2: Transform and clean the data by adding calculated columns.
Exercise 3: Identify patterns and weak areas across departments and questions.
Exercise 4: Use Python in Excel to generate a score distribution chart.

See prompts.md for the detailed prompts for each exercise.

What a Completed Insights Dashboard Looks Like



A completed Insights sheet generated by Copilot (Claude Opus 5.5) in Excel. It includes key metrics such as pass rate and average score, the top 3 insights, a pass rate by department table with colour-coded gaps, a question difficulty table, and a bar chart comparing departments. The Copilot panel on the right shows the prompt used, the model response, and Done / Undo buttons to keep or reverse the changes.

This is the target output for Exercise 1. Your dashboard may look slightly different depending on your data and the model you use.

Tips for Copilot in Excel

- Make sure your data is formatted as an **Excel Table** (Ctrl+T) before using Copilot. Copilot works best with structured tables.
- If Copilot asks for clarification about which data to use, click on the relevant table or sheet first to give it context.
- Use **Allow editing** for building outputs and **Chat only** for asking questions without changing the workbook.
- For complex analysis tasks, switch to **Claude Opus** for more thorough reasoning.
- For Python exercises, ask for Python explicitly in your prompt (for example, "Use Python to..."). There is no separate Python Tool toggle in Sources any more.
- Save your workbook regularly. Copilot edits cannot always be undone with Ctrl+Z.

HANDS-ON

Hands-on exercises

Use these prompts to analyse, transform, and visualise your AI Usage Guide quiz response data.

> **Session guide:** All exercises use the same workbook. Open AI_Guideline_Survey_Responses.xlsx in Excel desktop, enable **Allow editing** in the Copilot panel, and work through Exercises 1 to 4 in order. Switch to Claude Opus for best results on analytical tasks.

> **Before you start:** Click on the Quiz Responses sheet and make sure the data is formatted as an Excel Table. If it is not, select any cell in the data and press Ctrl+T to convert it.

Exercise 1 — Generate insights and an insights dashboard

Mode: Allow editing | Recommended model: Claude Opus

This is the main exercise. You are asking Copilot to analyse the entire dataset and produce a summary dashboard in a new sheet.

Part 1A: Generate the insights dashboard

```
Analyse this workbook to uncover meaningful and interesting
data insights. Include the 3 most important insights,
findings, or takeaways, including a visualisation to help
illustrate or clarify a finding. Next, ask me questions to
clarify what I am interested in learning or suggest steps
for deeper analysis. Insert the summary in a new sheet.
```

> This is the same prompt shown in the sample dashboard screenshot. Copilot will reason through the data and build a new sheet with KPIs, tables, and a chart. It may take 30 to 60 seconds.

Part 1B: Follow-up questions after the dashboard is created

```
What is the overall pass rate and average score across
all 100 respondents? Show the results as KPI cells at
the top of the dashboard.
```

```
Which department has the highest pass rate and which
has the lowest? What is the gap between them?
```

```
Which 3 questions had the lowest accuracy rates across
all respondents? What do these questions have in common?
```

```
Add a bar chart comparing average score by department.
Sort the bars from highest to lowest average score.
```

Part 1C: Improve the dashboard

```
The dashboard needs a title. Add a clear title row at
the top that says "AI Usage Guide Quiz — Key Insights
Dashboard" and a subtitle that says "Analysis of 100
respondents across 8 departments — 20 questions on AI
policy awareness".
```

```
Colour-code the pass rate column in the department table:
green for 75% and above, amber for 60% to 74%, and red
for below 60%.
```

Exercise 2 — Data transformation and cleaning

Mode: Allow editing | Sheet: Quiz Responses

This exercise adds calculated columns to the raw data so it is easier to analyse.

Part 2A: Add a Score column

```
Add a new column called "Score" after the Department
column. For each row, count how many of the 20 question
columns contain the correct answer.

The correct answers are in the Answer Key sheet.
Use a formula that counts matching answers across
columns G to Z for each row.
```

If Copilot needs guidance on the correct answers:

```
The correct answers for each question are:
Q1: To enable safe and consistent adoption of AI tools
Q2: Microsoft 365 Copilot
Q3: Personal data, IC numbers, and confidential business information
Q4: The employee who used the AI tool
Q5: Review and verify it before use
Q6: Entering customer personal data into the tool
Q7: Stop and seek guidance from your manager or IT
Q8: Review, test, and get approval before use
Q9: AI output must always be reviewed before use
Q10: Annually
Q11: IT Governance department
Q12: Report to IT Governance and line manager
Q13: Entering personal data of employees into AI tools
Q14: Verify them against the original source
Q15: All permanent, contract, and temporary staff
Q16: Ensure it has been reviewed and approved by a responsible person
Q17: Data privacy and security risks
Q18: Discard the output and redo the task manually or with guidance
Q19: Automatically making decisions based on AI recommendations
Q20: Use AI to assist, then verify findings before acting
```

```
Add a Score column that counts how many of these correct
answers each respondent gave.
```

Part 2B: Add a Pass/Fail column

```
Add a column called "Pass/Fail" next to the Score column.
Mark each respondent as "Pass" if their score is 14 or
above (70%), and "Fail" if it is below 14.
```

Part 2C: Add a Percentage column

```
Add a column called "Score %" next to Pass/Fail.
Calculate each respondent's score as a percentage of 20.
Format the column as a percentage with one decimal place.
```

Part 2D: Add a Completion Time column

```
Add a column called "Duration (mins)" that calculates
how long each respondent took to complete the quiz.
Use the Start time and Completion time columns.
Round to one decimal place.
```

Part 2E: Check for data issues

```
Review the data in this sheet for any issues:
missing values, duplicate entries, inconsistent
department names, or any outliers in completion time.
Report what you find without making changes yet.
```

Exercise 3 — Pattern analysis and weak area identification

Mode: Allow editing or Chat only | Sheet: Quiz Responses or Summary

Part 3A: Department comparison

```
Compare quiz performance across all 8 departments.
For each department show: number of respondents,
average score out of 20, pass rate as a percentage,
and rank from highest to lowest pass rate.
Create this as a formatted table in a new sheet
called "Department Analysis".
```

```
Which departments should be prioritised for additional
AI training based on these results? Justify your
recommendation with specific data points.
```

Part 3B: Question weakness analysis

```
For each of the 20 questions, calculate how many
respondents answered correctly and express it as
a percentage. Identify the 5 questions with the
lowest accuracy rates. What topics do these questions
cover and what does this suggest about gaps in
staff understanding?
```

```
For the 3 weakest questions, suggest one training
intervention for each that could improve staff
understanding of that specific policy point.
```

Part 3C: Cross-analysis

```
Is there a correlation between how long respondents
took to complete the quiz and their score? Do faster
respondents score higher or lower on average?
```

```
Which department had the most consistent scores
(lowest variation between respondents) and which
had the most inconsistent? What might explain
the difference?
```

Exercise 4 — Python in Excel

Mode: Allow editing | Ask for Python in your prompt

> **Before starting:** There is no separate Python Tool toggle any more — keep the prompts below, which ask Copilot to use Python explicitly.

Part 4A: Score distribution chart

```
Use Python to create a histogram showing the
distribution of quiz scores across all 100 respondents.
Use the Score column.
Include: a title "Score Distribution – AI Usage Guide Quiz",
x-axis label "Score out of 20", y-axis label "Number of Respondents",
and colour the bars using a teal colour scheme.
Insert the chart into the workbook.
```

Part 4B: Department performance heatmap

```
Use Python to create a heatmap showing question
accuracy by department. Rows should be departments,
columns should be question numbers 1 to 20.
Colour cells green for high accuracy and red for
low accuracy. This will show which departments
struggle with which specific questions.
Insert the chart into the workbook.
```

Part 4C: Pass/Fail breakdown chart

```
Use Python to create a stacked bar chart showing
Pass and Fail counts for each department side by side.
Use green for Pass and red for Fail.
Add data labels showing the count in each bar segment.
Title: "Pass vs Fail by Department".
Insert the chart into the workbook.
```

Part 4D: Explain the Python code

```
Show me the Python code you used to generate the
score distribution histogram. Explain each part
of the code in plain language so I can understand
what it does and modify it if needed.
```

Exercise 5 — Management summary

Mode: Allow editing | Recommended model: Claude Opus

Once your analysis is complete, ask Copilot to write a summary suitable for management.

```
Based on all the analysis in this workbook, write a
management summary of the quiz results. Include:
- Overall pass rate and average score
- Top performing department and why it stands out
- Department that needs the most support and a
  specific recommendation
- The 3 questions with the lowest accuracy rates
  and what training gap they reveal
- One recommended next step for the organisation

Write it in a professional tone suitable for a
department head report. Keep it under 200 words.
Insert it as a formatted text block in a new sheet
called "Management Summary".
```

10

CHAPTER 10

Copilot in Teams

Your AI Usage Guide is approved and you have a deck to present it. The next step is the launch meeting: walk your team through the guide, answer their questions, agree what happens next, and make sure people who missed it can catch up. Copilot in Teams helps with all of that, before, during and after the meeting.

> **When to teach this topic:** it follows on naturally from Topic 07, since the launch meeting is where you present your deck. Run it straight after Topic 07 if you prefer, or here, before Copilot Studio.

Continuing from Topic 07

At the end of Topic 07 you had a team briefing deck for the AI Usage Guide. In this topic you present it in a Teams meeting and let Copilot capture the discussion.

If you have your deck: share it in the meeting when you present.

If you do not have it: any three slides will do. The point of this topic is what Copilot does with the conversation, not the slides themselves.

Working in a training room? Pair up. One person schedules a 10-minute Teams meeting and invites the other, then you swap roles for the second half.

What Copilot Can Do in Teams

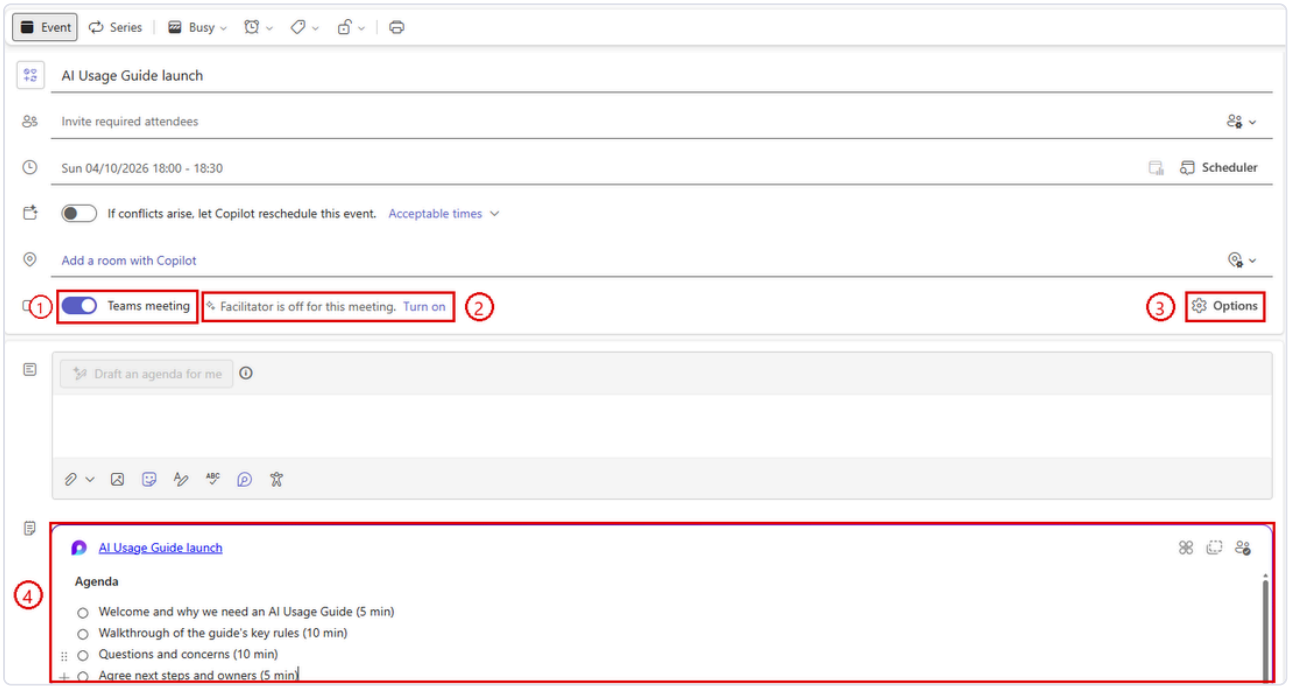
- Summarise a meeting while it is still running, including who said what
- Answer questions about the meeting, such as "what did we decide?" or "what questions are still open?"
- Suggest action items and owners
- Run the meeting with **Facilitator**: track the agenda, take live notes, log decisions and list follow-ups
- Give you a **Recap** afterwards, including an audio recap you can listen to
- Summarise a long chat or channel conversation so you can catch up quickly

> **License note:** Copilot in meetings, Facilitator and the meeting recap need a Microsoft 365 Copilot (Premium) license. Your organisation's settings also decide whether they appear, so if you cannot see a button described here, check with your trainer or IT team.

Before the Meeting: Set Up the Agenda and Facilitator

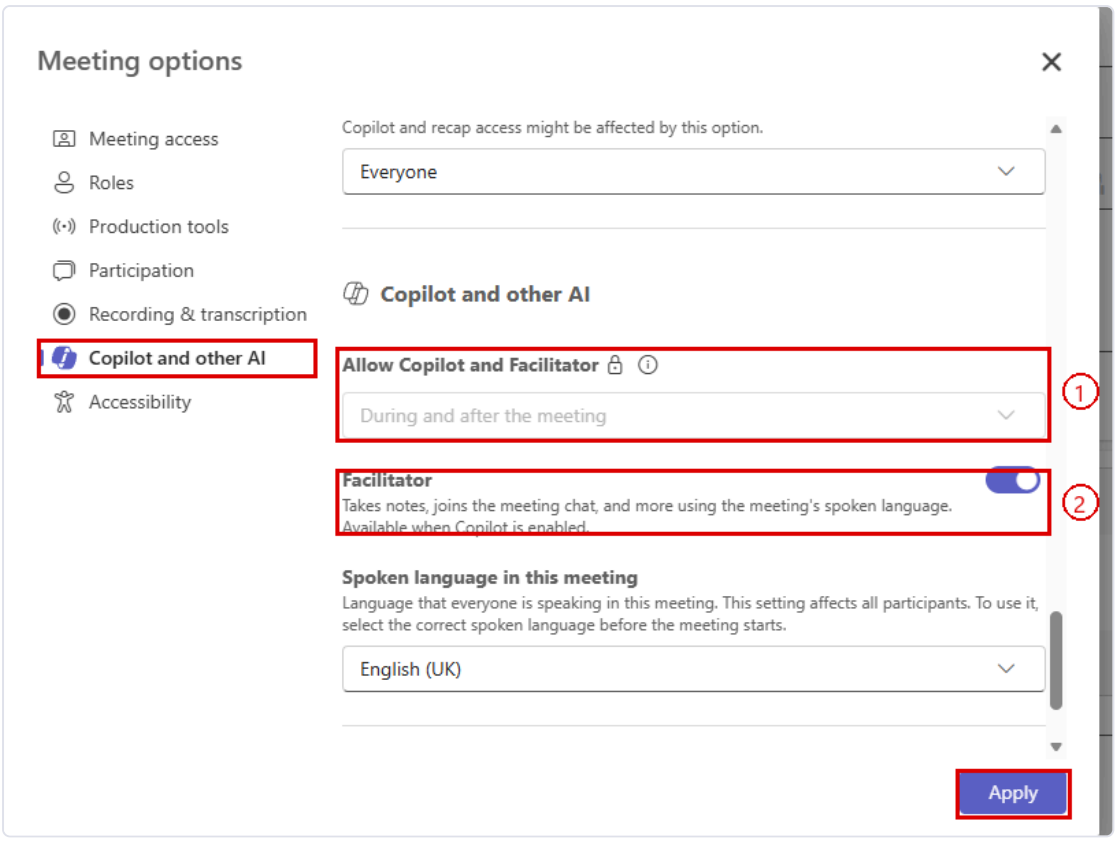
Facilitator works best when the meeting has an agenda. It looks for one in the meeting description and in the meeting's Loop notes.

1. In Teams, select **Calendar**, then **New** (top right).
2. Give it a title, for example *AI Usage Guide launch*, and invite your team (or your partner).
3. Turn on the **Teams meeting** toggle. A line appears next to it saying whether Facilitator is on, with a **Turn on** link, and an **Options** button appears on the right.
4. Scroll to the bottom of the invitation and select **Add an agenda** (if the meeting starts straight away, the link may say **Add meeting notes** instead; it adds the same Loop component). A Loop component appears with an **Agenda** list. Type your agenda items into it, one per line. Part 1 of the prompts shows how to get Copilot to write them for you (the **Draft an agenda for me** button above the description can also do this).



Callout 1: the Teams meeting toggle. Callout 2: Facilitator status, with Turn on. Callout 3: Options. Callout 4: the Loop agenda added with Add an agenda.

5. Select **Turn on** next to the Facilitator line, or open **Options**, choose **Copilot and other AI**, turn on **Facilitator** and select **Apply**.
6. Check how Copilot is allowed to run (see the table below), then select **Save** (or **Send** if you invited people).



Callout 1: Allow Copilot and Facilitator. A padlock means your organisation has fixed this setting. Callout 2: the Facilitator toggle. When Facilitator is on, you can also set the spoken language of the meeting.

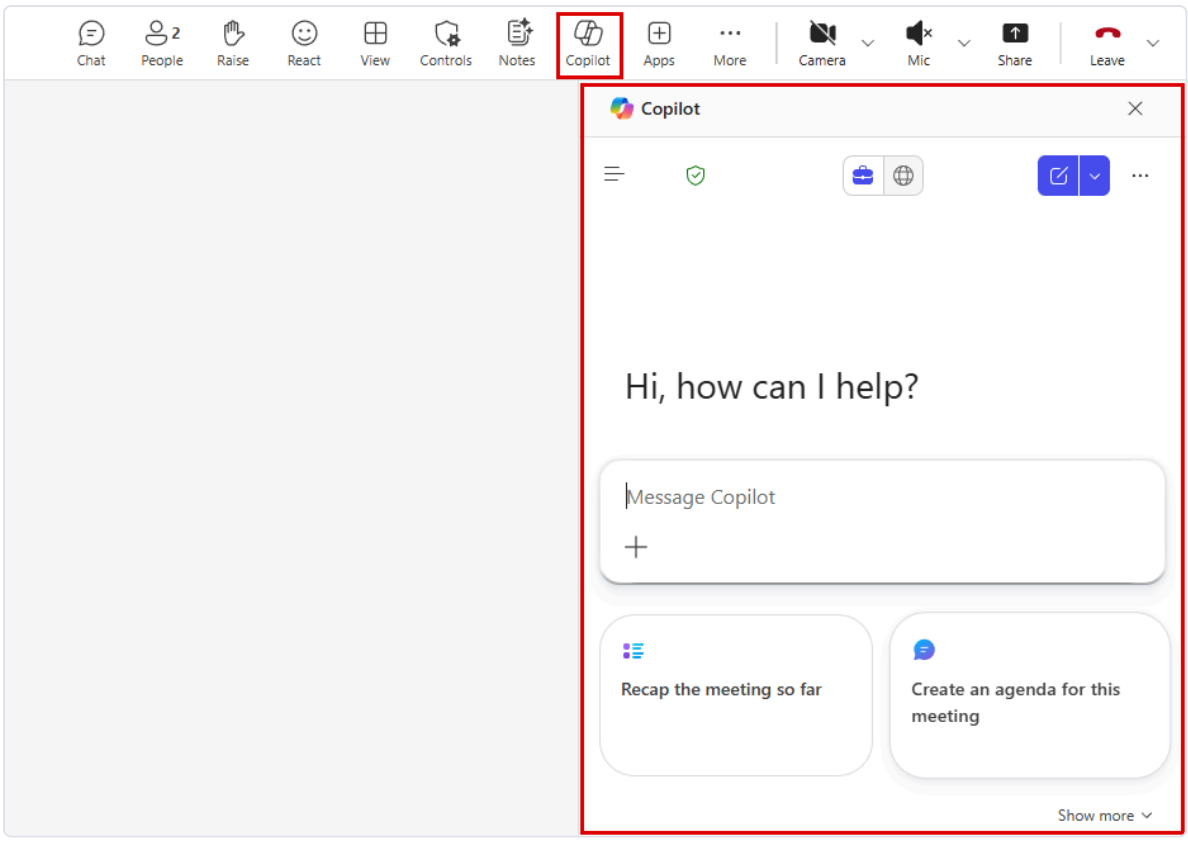
Choosing how Copilot runs

The **Allow Copilot and Facilitator** setting has these choices. If you see a padlock next to it, your organisation has set it for you and you cannot change it.

Setting	What it means	Use it when
During and after the meeting	Copilot uses the transcript, so you can keep asking it questions after the meeting ends	You want a record and follow-up questions (the usual choice)
Only during the meeting	Copilot works from live speech without saving a transcript. Nothing is left to ask about afterwards	The discussion is sensitive and you do not want a transcript kept
Off	No Copilot or Facilitator in this meeting	Copilot is not appropriate for this meeting

During the Meeting

1. Start the meeting and present your deck.
2. Select **Copilot** in the meeting controls. If transcription is not on yet, Copilot asks you to start it. (Some organisations start transcription automatically, and everyone sees a "Transcription has started" notice.)
3. Ask Copilot questions as the discussion goes on, or pick a suggestion such as **Recap the meeting so far**. Part 2 of the prompts has questions that work well.



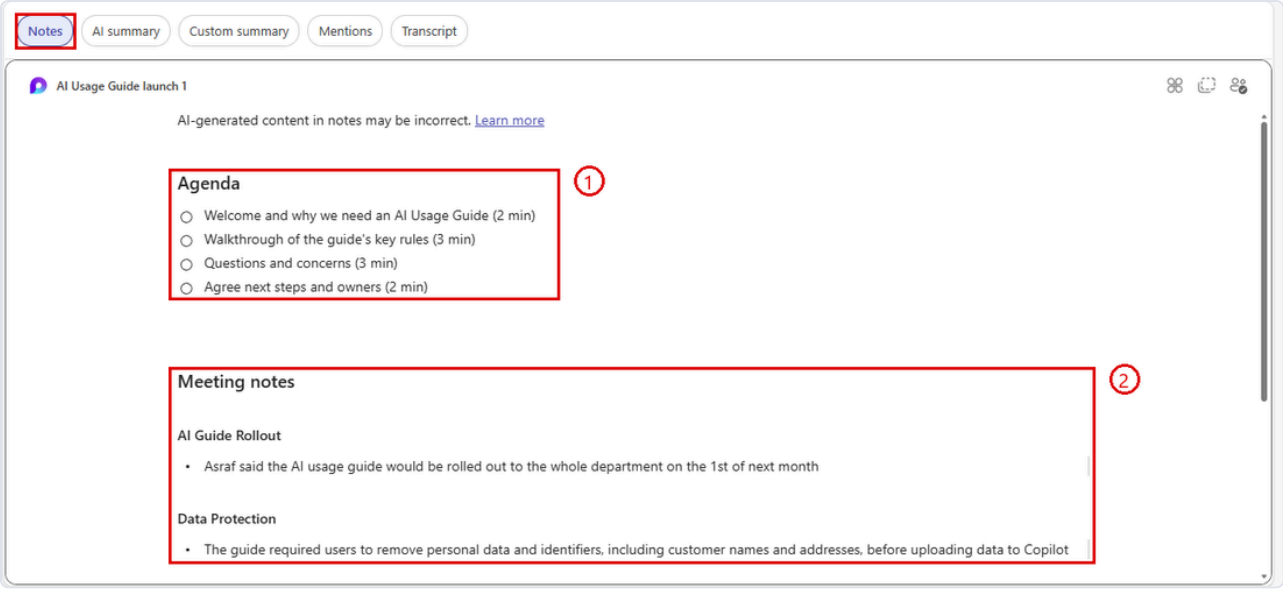
Select Copilot in the meeting controls to open the Copilot pane on the right.

Only you see your Copilot questions and answers. Other people in the meeting cannot see what you ask.

Facilitator in the meeting

If Facilitator is on, it joins the meeting as a participant and works for everyone, not just for you:

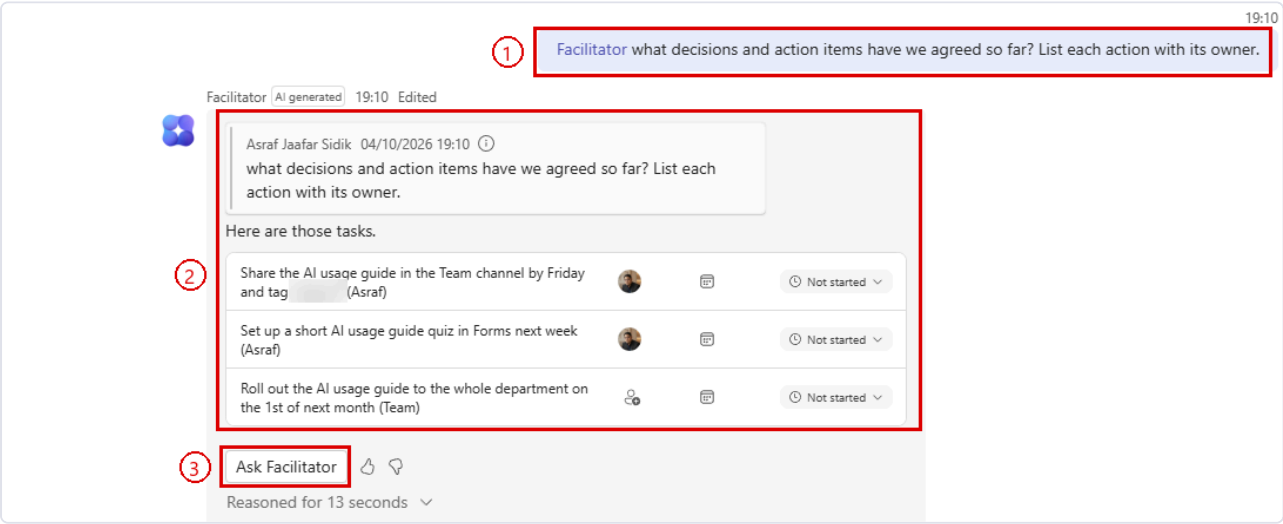
- It shows the agenda in a bar across the top of the meeting, with a timer for each item, and ticks items off as you cover them
- It takes notes in the shared Loop meeting notes as people talk (select **Notes** in the meeting controls to see them)
- It records decisions and follow-up tasks, with owners where it can tell who agreed to what



Facilitator's notes for the AI Usage Guide launch, on the Notes tab of the Recap. Callout 1: the agenda (items are ticked off when the meeting moves through them). Callout 2: Facilitator's meeting notes, grouped by topic.

Ask Facilitator in the meeting chat

Facilitator also joins the meeting chat, so anyone in the meeting can ask it a question there. Type **@Facilitator**, pick **Facilitator** from the suggestions, then type your question, for example *what have we agreed so far?* Select **Ask Facilitator** under one of its replies to follow up. When you ask about action items, Facilitator replies with a list of trackable tasks, each with an owner and a status such as **Not started**.



Callout 1: the @Facilitator question. Callout 2: Facilitator's reply, with each action as a task and its owner. Callout 3: Ask Facilitator, to follow up.

The difference from Copilot is who sees the answer:

	Copilot	Facilitator in the chat
Who sees the question and answer	Only you	Everyone in the meeting chat

Best for	Private questions, such as "what did I miss?" or "what should I ask next?"	Questions the whole group benefits from, such as "what are the action items so far?"

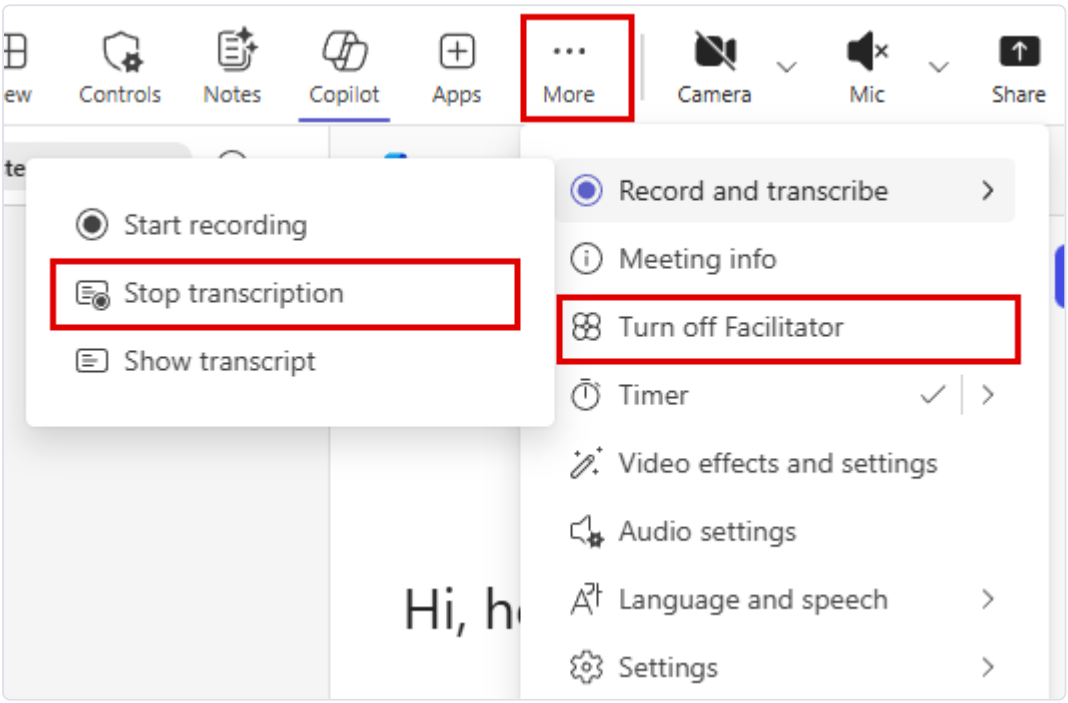
> **Tip:** ask Facilitator to list the decisions and action items in the chat just before the meeting ends. Everyone sees the same list, so people can correct an owner or a date while they are still in the meeting.

Turning the AI off mid-meeting

Organisers can stop the AI during a live meeting when the conversation moves to something that should not be summarised, such as a personal matter or a confidential deal:

- **More → Record and transcribe → Stop transcription** stops the transcript, so Copilot and the recap stop capturing what is said
- **More → Turn off Facilitator** removes Facilitator from the meeting

You can turn both back on from the same menu. Some organisations also show a single **Meeting AI** switch that does both.



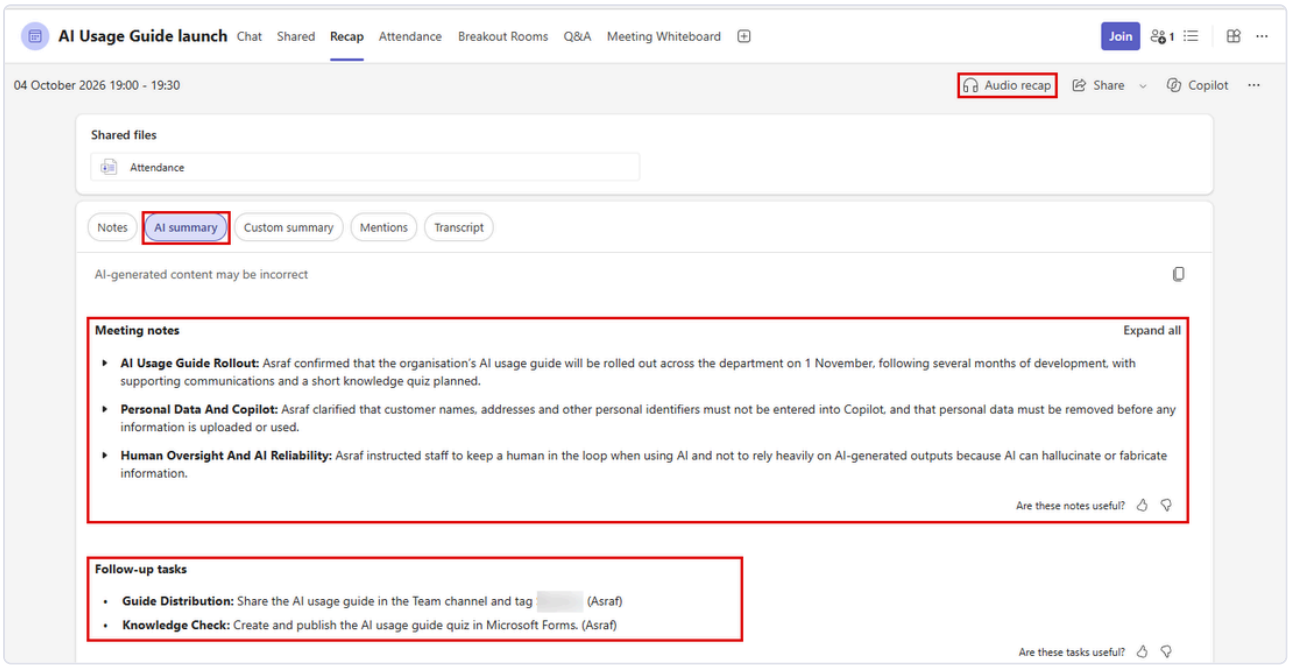
In the meeting controls, select More. Stop transcription is under Record and transcribe, and Turn off Facilitator is in the main menu.

> **Key point:** everyone in the meeting is told when transcription starts. Copilot in a meeting follows the same rule as the Enterprise Data Protection you met in Topic 01: it is secure, but it is not private from your organisation.

After the Meeting: Recap

When the meeting ends, open the meeting chat and select **Recap** at the top. You will find:

- **AI summary**: **Meeting notes** grouped by topic, with timestamps that jump to that point in the recording, and **Follow-up tasks** with suggested owners
- **Notes**: Facilitator's Loop notes, if Facilitator was on
- **Custom summary**, **Mentions** and **Transcript** tabs
- **Copilot** (top right): keep asking questions about the meeting (if Copilot ran during and after the meeting)
- **Audio recap** (and **Video recap** if the meeting was recorded): a short summary you can listen to or watch, useful for anyone who missed the meeting



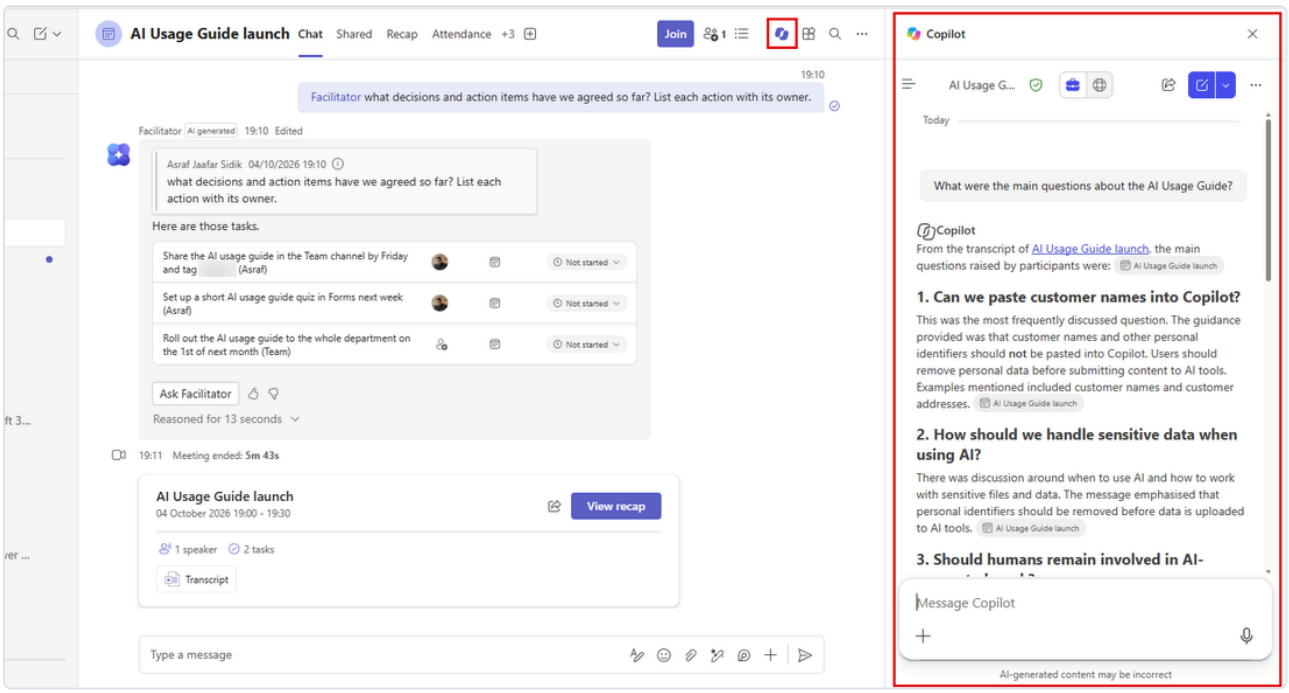
The Recap of the AI Usage Guide launch, with Audio recap, the AI summary tab, Meeting notes, and Follow-up tasks with their owners highlighted. This meeting was not recorded, so there is no Video recap.

> **Good habit:** read the action items before you share them. Copilot is good at spotting who agreed to something, but it can attach an action to the wrong person if two people spoke at once.

Copilot in Chats and Channels

Copilot also works in ordinary Teams chats and channels, not just meetings.

1. Open a chat or channel.
2. Select the **Copilot** icon (**Open Copilot**) at the top right of the conversation.
3. Pick a suggestion or ask it to summarise, for example *What were the main questions about the AI Usage Guide this week?*



The Copilot icon at the top right of the meeting chat opens Copilot in a side pane, here answering "What were the main questions about the AI Usage Guide?" from the meeting transcript.

By default Copilot looks at the last 30 days of the conversation. You can ask for a shorter or longer window, such as *the last 7 days*.

Workshop Scenario

You run the launch meeting for your AI Usage Guide. Before the meeting you get Copilot to draft an agenda and turn Facilitator on. During the meeting you present your deck and use Copilot to keep track of questions and decisions. Afterwards you use the recap to send a follow-up to the team channel and catch up a colleague who could not attend.

Tips for Copilot in Teams

- Turn transcription on early. Copilot can only answer questions about the part of the meeting it heard.
- Give the meeting a clear agenda. Facilitator and the recap are both much better when the meeting has structure.
- Ask Copilot "What questions have not been answered yet?" near the end of the meeting, while people are still there to answer them.
- Use **Only during the meeting** for sensitive discussions, so no transcript is kept.
- Copilot in a chat only reads that chat. To pull information from across your emails, files and meetings, use Copilot Chat with Work IQ on (Topic 03).

HANDS-ON

Hands-on exercises

Use these prompts to plan, run and follow up on the launch meeting for your AI Usage Guide.

> **Session guide:** Part 1 runs in Copilot Chat. Parts 2 and 3 run in the Copilot pane inside a Teams meeting, so start a meeting first (pair up if you are in a training room). Parts 4 and 5 run in a Teams chat or channel.

Part 1 — Draft the meeting agenda

Where: Copilot Chat, Work IQ on

```
I am running a 30-minute Teams meeting to launch our new AI
Usage Guide to my department. Draft an agenda with 4 items and
a time for each. Include a short presentation of the guide,
time for questions, and agreeing next steps. Keep each item to
one line.
```

Copy the agenda into the Loop agenda in your meeting invitation (turn on **Teams meeting**, then select **Add an agenda** at the bottom of the form), then turn on **Facilitator** with the **Turn on** link next to the Teams meeting toggle, or under **Options > Copilot and other AI**.

Part 2 — During the meeting

Where: Copilot pane in the meeting (select **Copilot** in the meeting controls)

Ask these as the meeting goes on. Each one takes a few seconds.

```
Summarise the meeting so far in 5 bullet points.
```

```
What questions have people asked about the AI Usage Guide,
and which ones have not been answered yet?
```

```
Where do people disagree, and what are the different views?
```

```
List the decisions we have made so far.
```

```
Suggest action items from this meeting, with an owner for each
where it is clear who agreed to do it.
```

> **Try it:** ask the "questions not answered yet" prompt about five minutes before the end, then use the answer to close the open questions while everyone is still in the meeting.

If Facilitator is on, you can also ask it in the **meeting chat**, where everyone sees the answer. Type **@Facilitator**, choose **Facilitator** from the suggestions, then type or paste the rest:

```
what decisions and action items have we agreed so far? List
each action with its owner.
```

Part 3 — After the meeting

Where: the meeting chat, **Recap** tab. If Copilot ran during and after the meeting, you can keep asking it questions there.

```
Write a short follow-up message for the team channel. Thank
everyone for attending, list the 3 key decisions, and list the
action items with owners and due dates. Plain language, under
150 words.
```

```
A colleague missed this meeting. Summarise what they need to
know about the AI Usage Guide in under 100 words, including
anything they are expected to do.
```

```
Based on the questions people asked, which sections of the AI
Usage Guide are unclear and should be improved?
```

Note: check the owners on every action item before you post the follow-up. Copilot can attach an action to the wrong person if two people spoke at once.

Part 4 — Post the follow-up

Where: your team channel

Paste the follow-up message from Part 3 into the channel. If you want to adjust it first, use the Copilot option in the compose box if you have one, or paste it back into the Recap Copilot pane with:

```
Make this friendlier and add a line asking people to reply
in this thread with any further questions.
```

Part 5 — Catch up on a busy chat

Where: any Teams chat or channel with a long conversation. Select **Copilot** at the top right.

```
Summarise the main points from the last 7 days.
```

```
What has been asked of me in this chat, and has anyone
followed up on it?
```

```
List any decisions made in this conversation, with the date
each one was made.
```

11

CHAPTER 11

Copilot Studio: Introduction to Agents

You have used Copilot as a tool that responds when you ask it something. An agent takes that further — it can act on your behalf, run on a schedule, and interact with other systems automatically. This topic is an introduction to what agents are and how to build a simple one.

> **Note:** This is an introductory overview. A full Copilot Studio workshop covers agents in much more depth. The goal here is to understand what agents are and build something simple to see how they work.

Continuing from Topic 10

You have now researched, drafted, refined, sent, presented, surveyed, analysed, and launched your AI Usage Guide. This final topic closes the loop by showing you how to automate the ongoing feedback process using a Copilot Studio agent.

Instead of manually sending a survey every week, an agent can ask your team one question, collect the response, and report back to you automatically.

Agents You Have Already Seen: Researcher and Analyst

Before building your own, it is worth noting that you have already used agents in this workshop. In Topic 01 and Topic 03 you saw the **Researcher** and **Analyst** agents in Copilot Chat. Those are pre-built agents that Microsoft has configured with a specific purpose and set of capabilities.

- **Researcher** is grounded in web search and designed for deep research tasks
- **Analyst** is designed for data analysis and works with files and structured data

What you will build in Copilot Studio is the same concept, just configured by you for your own specific use case.

Copilot Chat vs Copilot Agents

	Copilot Chat	Copilot Agent
How it works	You ask, it responds	It can act on its own based on triggers
Who initiates	You every time	You set it up once, it runs

Best for	One-off tasks, research, drafting	Repeatable, structured, automated workflows
Can it take actions?	Limited	Yes: send emails, update records, post messages
Built in	Microsoft 365 Copilot Chat	Microsoft Copilot Studio

What is Copilot Studio?

Copilot Studio is a low-code platform from Microsoft where you can build custom AI agents. You do not need to write code. You use a visual designer to define what the agent does, when it does it, and how it responds.

Access it at: copilotstudio.microsoft.com

Two Ways to Get Agents

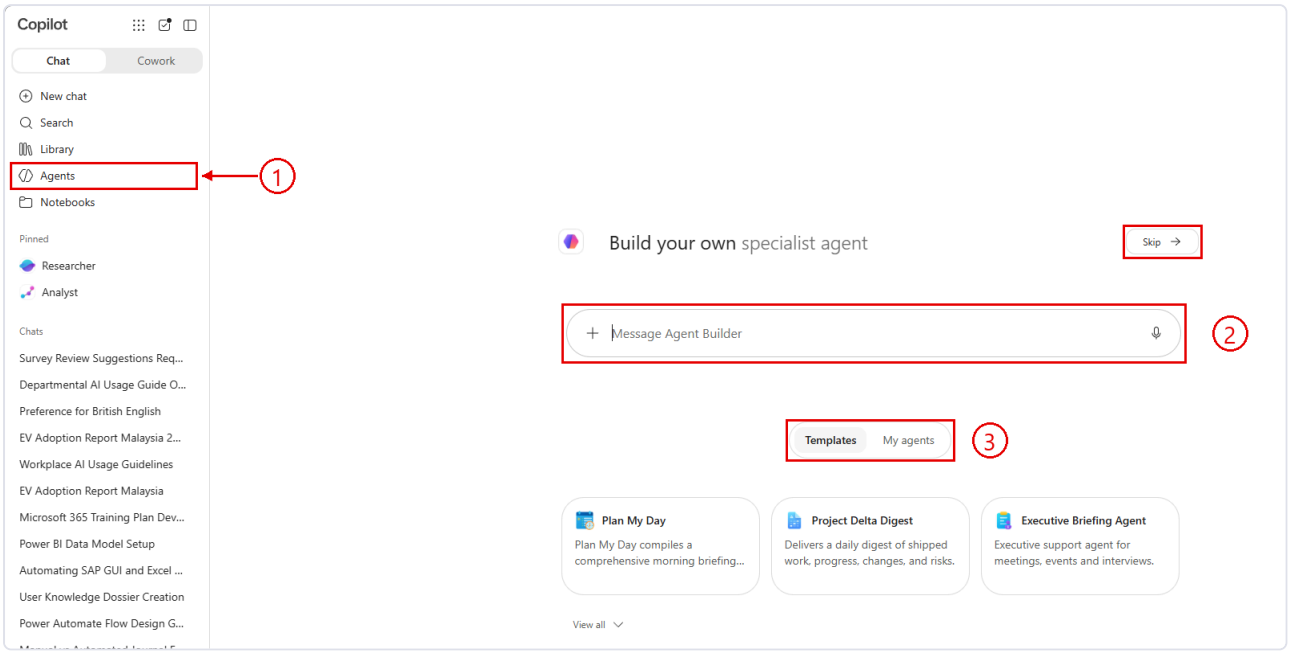
1. Agents from Copilot Chat

In Copilot Chat, click **Agents** in the left sidebar to open the Agent Store, where you can find and use pre-built agents for common tasks like HR queries, IT helpdesk, and document search. Your favourites are pinned below the navigation, as you saw in Topic 01.

2. Agents you build in Copilot Studio

You build these yourself using the Copilot Studio designer. You define the agent's name, what it knows, what it can do, and how it behaves.

The Agent Builder Interface



*Callout 1: **Agents** in the Copilot Chat sidebar — click the arrow next to it and choose **New agent** to open Agent Builder. Callout 2: the chat-based agent creator where you describe what you want the agent to do and Agent Builder builds it for you (or click **Skip** to configure it yourself). Callout 3: start from Microsoft Templates or view My agents.*

The fastest way to build a new agent is using Callout 2 — describe your agent in plain language and Agent Builder (part of Copilot Studio, built into Copilot Chat) generates the initial configuration for you. You can then refine it in the builder.

Workshop Scenario: A Weekly Feedback Agent

After collecting your initial survey in Topic 08, you want a way to check in with your team every week without manually sending surveys each time. An agent can do this for you.

The agent you will build:

- Asks team members one question: "How has the AI guideline helped you this week?"
- Collects their response
- Thanks them and confirms the response was recorded

This is a simple conversational agent, but it shows the core concept behind everything Copilot Studio can do.

How to Build the Agent

Step 1: Open Agent Builder

In Copilot Chat at m365.cloud.microsoft, click the arrow next to **Agents** in the left sidebar and choose **New agent**. (For advanced agents with triggers, topics, and workflows, use the full Copilot Studio at copilotstudio.microsoft.com.)

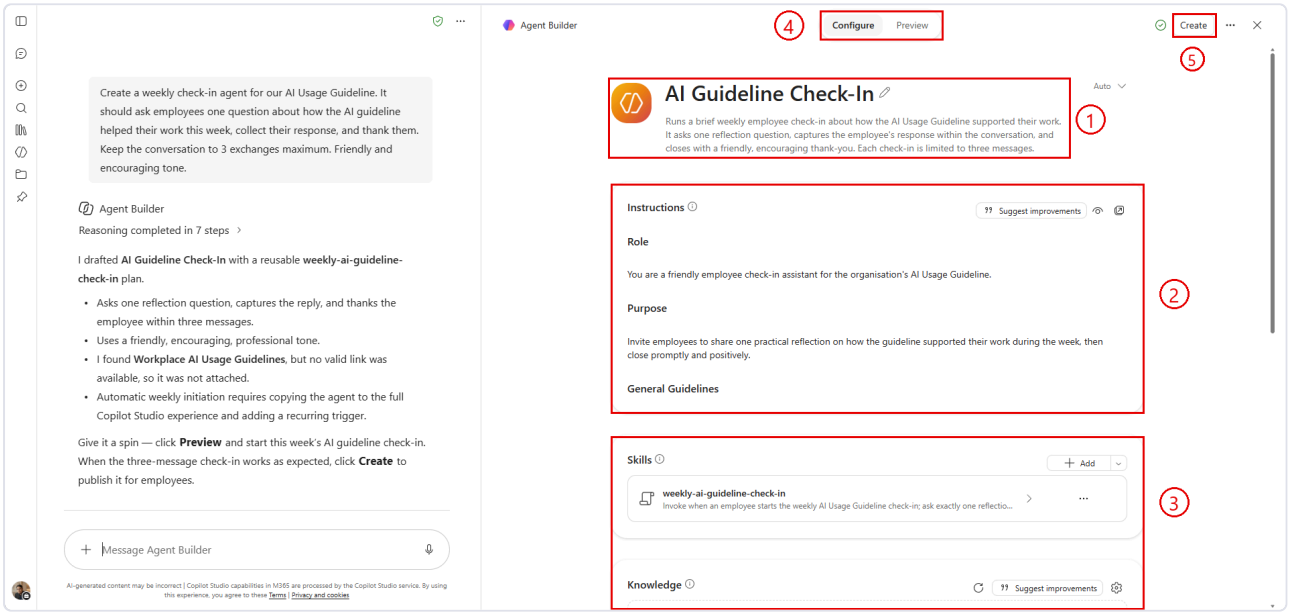
Step 2: Create a new agent using the chat builder

Click the chat input (Callout 2 in the interface screenshot) and describe your agent:

```
Create a weekly check-in agent for our AI Usage Guideline.
It should ask employees one question about how the AI
guideline helped their work this week, collect their
response, and thank them. Keep the conversation to
3 exchanges maximum. Friendly and encouraging tone.
```

Agent Builder will reason through your request and generate the initial agent configuration for you. The first time, a "What's new in Agent Builder" dialog may appear — close it to continue.

Step 3: Review and refine the configuration



The Agent Builder Configure tab. Callout 1: the agent's name and description. Callout 2: Instructions (role, purpose, and guidelines), with Suggest improvements. Callout 3: Skills and Knowledge. Callout 4: switch between Configure and Preview. Callout 5: Create, to save and publish the agent. The chat on the left summarises what Agent Builder drafted.

Review and adjust:

- **Name:** AI Guideline Weekly Check-in
- **Description:** A short summary of what the agent does
- **Instructions:** The full system prompt that defines the agent's behaviour
- **Skills:** Reusable plans Agent Builder creates for the agent (here, a weekly check-in skill)
- **Knowledge:** Any documents you want the agent to reference (optional: add your AI Usage Guide PDF here)

Step 4: Test the agent

Click the **Preview** tab at the top of Agent Builder. Type "weekly check-in" and see how the agent responds. Adjust the instructions if the response is not right.

Step 5: Publish and share

Once you are satisfied, click **Create** (top right). You can then share the agent with your team via Teams or a direct link.

Key Concepts

Trigger: What starts the agent conversation — a keyword, a scheduled time, or a button click.

Topic: A defined conversation flow — what the agent says and what it does based on user responses.

Action: Something the agent does beyond talking — like saving a response to SharePoint, sending an email, or updating a form.

Knowledge: Documents or websites you give the agent to reference when answering questions.

Channel: Where the agent is deployed — Microsoft Teams, a website, SharePoint, or a custom app.

Where to Go from Here

This introduction covered the basics. A full Copilot Studio workshop would go into:

- Building multi-turn conversations with conditional logic
- Connecting agents to Power Automate for automated actions
- Grounding agents in your company's SharePoint knowledge base
- Publishing agents to Teams for your whole organisation
- Monitoring agent usage and improving performance over time

Microsoft Learn resources:

- Get started with Copilot Studio
- Build your first agent
- Add knowledge to your agent

You have completed the workshop. Well done.

HANDS-ON

Hands-on exercises

Use these when building your first agent in **Agent Builder** (Copilot Chat → **Agents** → **New agent**), the quick builder that is part of Copilot Studio. The full Copilot Studio is at copilotstudio.microsoft.com.

> **Session guide:** Parts 1 and 2 are used in Agent Builder to build and configure your agent. Part 3 needs the full Copilot Studio (topics are not available in Agent Builder). Part 4 is used in the **Preview** tab of Agent Builder to check how the agent responds. Part 5 is used in Copilot Chat to brainstorm future agent ideas.

Part 1 — Create the agent using the chat builder

Paste this into the Message Agent Builder box to generate the initial agent configuration.

```
Create a weekly check-in agent for our AI Usage Guideline.
It should ask employees one question about how the AI
guideline helped their work this week, collect their
response, and thank them for their input.

Keep the conversation to 3 exchanges maximum.
Tone: friendly and encouraging.
Deploy on: Microsoft Teams.
```

If you want to build a different type of agent instead:

```
Create an AI Guideline FAQ agent for employees at a
Malaysian company. When an employee asks whether they
can use AI for a specific task, the agent guides them
through a quick 3-question check and tells them whether
to proceed, proceed with caution, or check with their
manager first.
```

Part 2 — Configure the agent instructions

Use these in the Instructions field in the agent builder configuration screen.

For the weekly check-in agent:

```
You are a weekly check-in agent for the AI Usage Guideline
at Nexus Corporate Services. Your job is to ask employees
one short question about how the AI guideline helped their
work this week, collect their response, and thank them.

Guidelines:
- Keep the conversation to 3 exchanges maximum
- Be friendly, warm, and encouraging
- Do not ask follow-up questions unless the employee
  wants to share more
- Confirm clearly that their response has been recorded
- Do not discuss topics unrelated to the AI guideline
  or Microsoft 365 Copilot
```

For the FAQ agent:

```
You are the AI Guideline assistant for employees at a
Malaysian company. When an employee asks whether they
can use AI for a specific task, guide them through
these 3 questions:

1. Does the task involve confidential or personal data?
2. Is the task on the approved use list in the AI guideline?
3. Has the output been reviewed by a human before use?

Based on their answers, tell them:
- All clear: proceed with AI assistance
- Proceed with caution: explain what to watch out for
- Check with your manager first: explain why

If you are unsure about a specific scenario, say so
and recommend they contact IT Governance.
```

Part 3 — Writing conversation topics

Use these when adding or editing a topic in the full Copilot Studio topic designer at copilotstudio.microsoft.com (optional, advanced).

Opening message for the Weekly Check-in topic:

```
Hi! This is your weekly AI guideline check-in.
Just one question for you today: how has using
Microsoft 365 Copilot helped you in your work
this week? Share one example — it does not need
to be long.
```

Opening message for an FAQ topic:

```
Hi, I am the AI Guideline assistant. I can help you
figure out whether it is safe to use AI for a specific
task. Just describe what you are trying to do and I
will guide you through a quick check.
```

Response when the employee says they are not sure:

```
No problem. Let me ask you a couple of quick questions
to help you decide. First: does this task involve any
personal data, such as employee names, IC numbers,
customer details, or confidential financial information?
```

Part 4 — Testing your agent

Click the Preview tab at the top of Agent Builder and type these to check how it responds.

```
weekly check-in
```

```
Can I use Copilot to write a performance review for my staff?
```

```
What should I do if Copilot gives me wrong information?
```

```
Is it safe to paste a client's contract into Copilot?
```

```
I need to summarise a report that contains salary data. Can I use Copilot for this?
```

```
What happens if I accidentally enter personal data into Copilot?
```

After each test response, ask yourself:

- Did the agent stay on topic?
- Was the tone appropriate?
- Was the response clear enough for a non-technical employee?
- Did it handle an edge case correctly?

If any response is off, go back to the Instructions field and add a clarification.

Part 5 — Brainstorm future agents

Use these in Copilot Chat, not in Copilot Studio.

```
I work in [your department] at a Malaysian company.
Suggest 3 practical Copilot Studio agents that could
save my team time or reduce repetitive work. For each
one describe: what it does, what triggers it, what
action it takes, and how it would be deployed.
```

```
What is the difference between a Copilot Studio agent
and a Power Automate flow? When would I use one over
the other? Give me a practical example of each.
```

> What knowledge sources can I connect to a Copilot Studio agent? How would I ground an agent in our company's SharePoint documents so it only answers questions based on our internal policies?

> I want to build an agent that automatically sends a weekly reminder to staff to complete their AI guideline acknowledgement form. What would the flow look like and what Microsoft 365 tools would it connect to?

Microsoft 365 Copilot Workshop

This guide accompanies the two-day Microsoft 365 Copilot workshop. It follows one project, an AI Usage Guide for your department, from first research in Copilot Chat, through a launch meeting in Teams, to a weekly check-in agent in Copilot Studio. Every chapter pairs short notes with copy-ready prompts you can use during the session and back at your desk.

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