

Quick Reference Card for Using Copilot

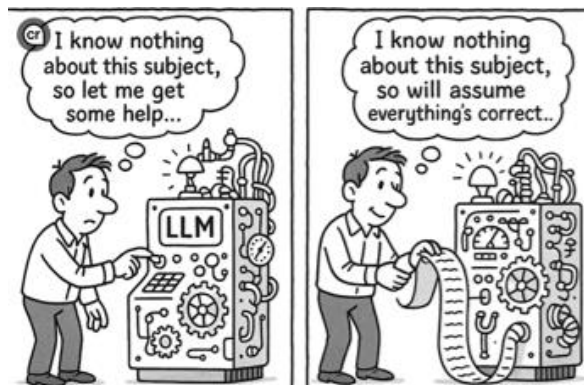
The **free** version of Copilot is a general-purpose AI assistant and does not access your organisation's internal data unless manually provided. The **paid** version is fully integrated with your workplace data, providing context-aware responses across Outlook, Word, Excel, Teams, SharePoint and more.

Security Matters

- Your data is not used to train Microsoft's foundation models.
- Your prompts and responses are not stored or used outside your organisation
- Microsoft 365 Copilot complies with GDPR
- Save sensitive files in secure SharePoint, Teams and OneDrive locations.
- Use labels such as CONFIDENTIAL to guide data processing and enforce governance.
- Avoid sharing sensitive data (e.g. passwords) in prompts.
- Ensure shared links and access rights follow least privilege principles.

Copilot Can

- Be unintentionally biased leading to inappropriate or prejudiced views.
- Use sensitive information if permissions are not set correctly.
- Can diminish creative thinking if over-used and always needs scrutiny.



Prompt Guidance

Consider the tone and implications when using AI-generated text. Emotional equity takes years to build and can be damaged quickly. What implications could there be? Professional relationships can be eroded in seconds.

Remember

To always review and verify prompt responses as information may be inaccurate. The same prompt may give different results. Always use Copilot responsibly.

The Do's

- Be clear and specific.
- Provide context.
- Define the format, tone and audience.
- Specify the length.
- Be prepared to refine prompts.
- Treat the prompt as a conversation.
- Ask Copilot how you could improve the prompt.

The Don'ts

- Be vague.
- Ask leading or biased questions.
- Give conflicting instructions.
- Request inappropriate content.
- Use slang or jargon unnecessarily.
- Expect perfection.

Ideas on how to use in

MS Excel

- Instead of building formulas, ask: 'Show me the top 5 products by sales,' or 'Explain the trend in column C over the last 6 months.'
- Get Copilot to create charts automatically.
- Ask it to clean or restructure data: "Format this into a clear table with headings and totals."
- Ask it to add a column that shows year-to-date totals by department
- Share the top insights and trends in this data and create a chart



MS Word

- Paste your bullet points or messy notes and ask Copilot to create a polished report, proposal, policy, or letter.
- Use prompts like: 'Rewrite this more professionally for senior leadership' or 'Summarise this document in 150 words.'
- Ask Copilot to adjust tone: friendly, formal, concise, or persuasive.



MS Outlook

- Use Copilot to summarise long or complex email chains so you don't spend time scrolling.
- Ask Copilot to "Draft a polite reply confirming attendance," or "Create a professional response addressing their concerns."
- Create quick follow-up lists: "Extract all actions from this email thread."



MS PowerPoint

- Upload a Word document and ask Copilot to create a presentation with slides, speaker notes and suggested images.
- Ask Copilot to 'Make this slide more engaging' or 'Reduce the text and simplify the layout'
- Quickly generate visuals or reconstruct the presentation: 'Create a 5-slide overview for managers'.



MS Teams

- On the left panel, click the 3 dots (...) and find Copilot and pin it
- Summarise the key decisions and action items from this meeting
- What's the current status of this discussion
- Ask Copilot to draft a follow up email based on the action items from today's meeting on ...
- Create a list of follow up questions from the ... meeting



Using Copilot offers key advantages such as speeding up routine tasks, improving content creation, enhancing data analysis, and providing intelligent, context-aware support directly within your Microsoft 365 apps. Have a go now.