

## Purpose of this guide

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This guide introduces Microsoft 365 Copilot Chat for University of North Carolina System Office employees. It is designed for employees who are:

- New to Copilot Chat, or
- Looking for a simple, practical starting point

Copilot Chat can help with everyday work such as drafting, summarizing, brainstorming, outlining, organizing information, and thinking through next steps.

It should be used as a work assistant, not as a replacement for employee judgment, review, or System Office guidance.

System Office access note: Most employees should expect to use Copilot Chat through the standalone Microsoft 365 chat experience, Outlook, and Teams. Full native Copilot features inside every Microsoft 365 app may not be available to every account. Some approved accounts may see additional capabilities based on role, license assignment, app availability, Microsoft rollout timing, and System Office configuration.

## What is Microsoft 365 Copilot Chat?

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Microsoft 365 Copilot Chat is a chat-based AI experience available to eligible employees through their Microsoft work account.

You type a question or instruction (called a prompt), and Copilot Chat provides a response. You can use Copilot Chat to help with tasks such as:

- Drafting a first version of a message
- Rewriting text for clarity or tone
- Summarizing approved or public content
- Brainstorming ideas
- Creating outlines and checklists
- Preparing for meetings
- Explaining concepts in plain language

### **Copilot Chat works best when you provide:**

- A clear task
- Appropriate context
- A specific output format

## Before you begin

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Use Copilot Chat carefully and responsibly. Employees remain responsible for:

- Protecting institutional data
- Following System Office guidance
- Reviewing AI-generated outputs
- Verifying important information
- Deciding whether an output is appropriate to use

Copilot Chat does not replace human judgment or approved review processes.

### Data reminder

Do not enter, paste, upload, or expose Tier 3 data in AI tools.

If you are unsure whether information is appropriate to use with Copilot Chat, pause and ask before proceeding.

## How to access Copilot Chat

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Access and available Copilot features may vary based on:

- University of North Carolina System Office configuration
- Microsoft updates
- App availability
- License assignment

Use the approved access path provided by IT or System Office guidance.

Practical workflow: If you do not have native Copilot access inside a specific Microsoft 365 app, use Copilot Chat to draft, summarize, outline, create CSV-style content, or generate text. Review the output carefully, then move the final content manually into Word, Excel, PowerPoint, Outlook, Teams, or another approved app.

### Placeholder for final version

[Insert approved access path or sign-in URL]

When signing in:

- Use your System Office Microsoft work account
- Do not use a personal Microsoft account for System Office work

## Good first tasks

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Start with low-risk, everyday tasks that do not require sensitive information.

### 1 Draft a short internal message

Use Copilot Chat to create a first draft from non-sensitive notes.

#### Example prompt

*Draft a short internal email to [audience] explaining [topic].  
Use a professional, clear, and helpful tone.*

### 2 Rewrite approved text

Use Copilot Chat to make approved content clearer, shorter, or easier to read.

#### Example prompt

*Rewrite the following text to make it clearer and more concise.  
Keep the meaning the same.  
Do not add new facts.*

### 3 Summarize appropriate content

Use Copilot Chat to summarize public information, approved text, or non-sensitive notes.

## Example prompt

*Summarize the following approved text into five key points and three action items.  
Do not add information that is not in the text.*

## 4

### Create a checklist

Use Copilot Chat to organize a routine task into steps.

## Example prompt

*Turn these notes into a checklist organized into before, during, and after steps.*

## 5

### Brainstorm questions

Use Copilot Chat to help identify what you need to clarify before starting a project.

## Example prompt

*I am starting a project about [topic].  
Give me ten questions I should answer before beginning.*

## A simple prompt structure

A useful prompt usually includes four parts:

Prompt part	What to include	Example
Task	What you want Copilot Chat to do	Help me draft an email
Context	Relevant background that is appropriate to share	This is for an internal project update
Audience	Who the response is for	System Office employees
Format	What the output should look like	Three short paragraphs with bullet points

## Try this structure

*Help me [task].  
The context is [brief context].  
The audience is [audience].*

Use a [tone] tone.

Provide the response as [format].

## Review before using the output

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### Before using a Copilot Chat response, ask

- Is the information accurate?
- Is the tone appropriate?
- Did Copilot Chat add anything that was not in the source material?
- Does the response leave out important context?
- Is the content appropriate to share?
- Do I need to verify facts, dates, figures, or requirements?
- Does this need supervisor, subject-matter expert, legal, security, HR, or data governance review?

Do not treat AI-generated content as final without review.

## What to avoid

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Avoid using Copilot Chat for:

- Tier 3 data
- Sensitive or restricted information
- Confidential details not approved for AI use
- Final decisions without human review
- Policy interpretation without verification
- Facts, figures, or requirements that have not been checked against official sources

## Quick reference checklist

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### Before using Copilot Chat

- I am signed in with my approved System Office Microsoft work account
- I am using information appropriate for AI use
- I am not entering, pasting, uploading, or exposing Tier 3 data
- My prompt is clear and specific
- I will review and verify the output before using it
- I will ask for guidance if I am unsure

## Need help?

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**For access issues, feature availability, or questions about approved use, contact**

[Insert approved IT / support contact]

**For data classification or responsible-use questions, contact**

[Insert approved security / data governance contact]

## Final reminder

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**You are responsible for the final work product**

Copilot Chat can help you work more efficiently, but you are responsible for the final work product. Use human judgment, protect institutional data, and follow University of North Carolina System Office guidance.