Getting started with Microsoft Copilot

Copilot is our university's official approved Generative AI (GenAI) tool. It is available to all students and staff when you login using your Microsoft 365 credentials.

What is Copilot?

Copilot is a Microsoft tool powered by a **large language model** (LLM). These models are designed to work with natural language, summarise information, help you brainstorm, and support everyday study, teaching, and administrative tasks. To learn more about Generative AI in education, have a look at JISC's Generative AI Primer.

Can I trust what Copilot says?

⚠️ Generative AI is prone to making up facts or confabulating information, you may have heard these referred to as **hallucinations**.

Always **use your judgement** and **independently verify** any information Copilot gives you.

Where can I find it?

You can use Copilot Chat in your browser by visiting the M365 Copilot website: https://m365.cloud.microsoft/chat/

💡 Once you log in, you will see the Copilot chat homepage. Make sure you're **signed in** with your **university account**. Look for the **green shield icon** - this confirms you're working in the trusted, protected version.
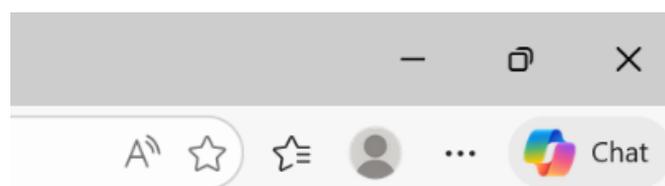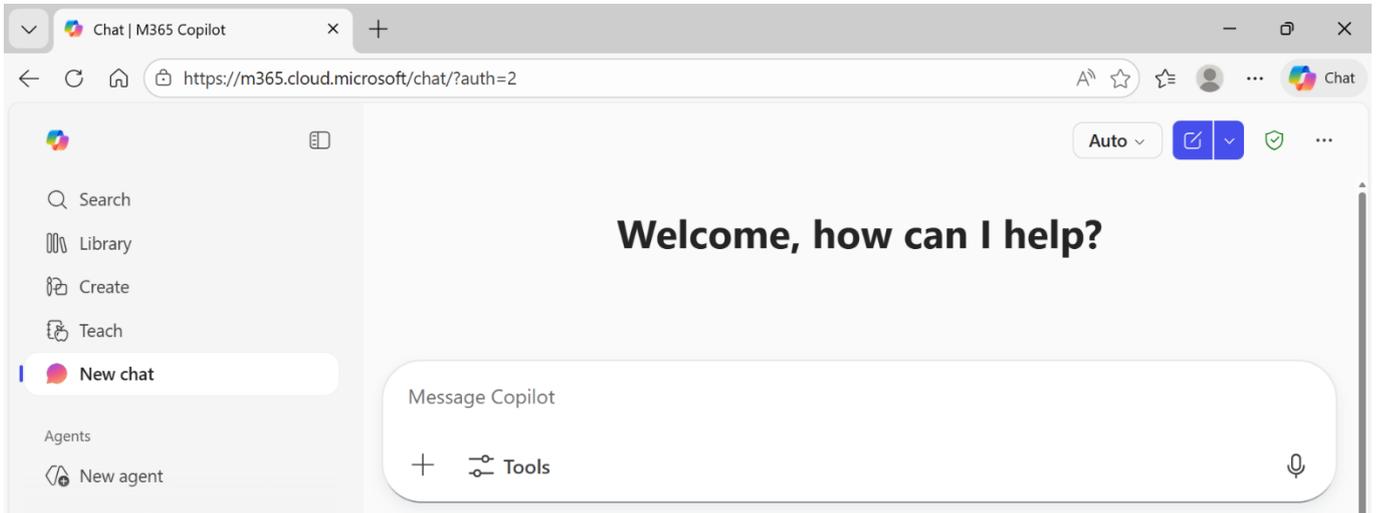
There is a dedicated **Copilot app**, and it is also built into some of the tools you already use every day, like **Teams, Edge, and Outlook**. Click the icon in your apps to launch Copilot:

Copilot in Edge

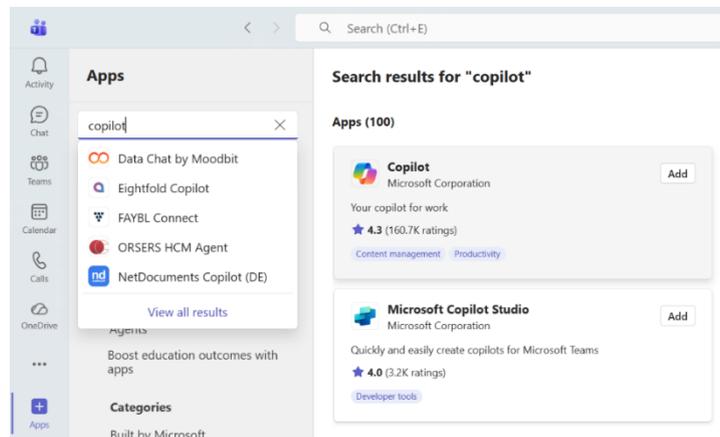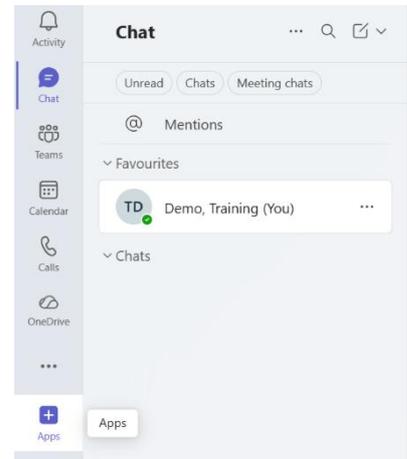Find the Copilot icon in the top-right corner, next to the address bar.

Adding Copilot to Teams and Outlook

To use Copilot in Teams and Outlook, you'll first have to install it.

1. In Teams, click **Add** – along the app bar on the left-hand side.

2. In the search bar, type **Copilot**.
Click **Copilot –
Microsoft Corporation**
in the results.

3. Click **Add**. This installs Copilot into Teams and Outlook.

4. Copilot will open once you install it. You will now be able to access Copilot by clicking the icon in your Teams app bar.
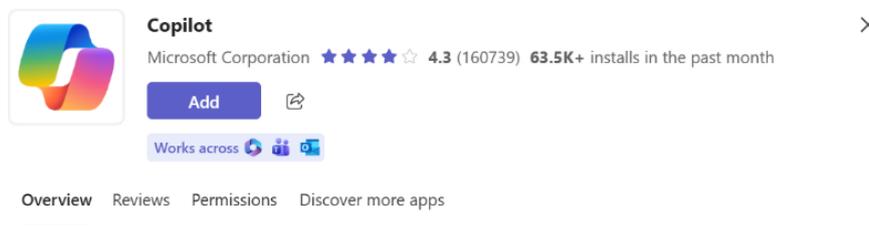
Copilot in Outlook

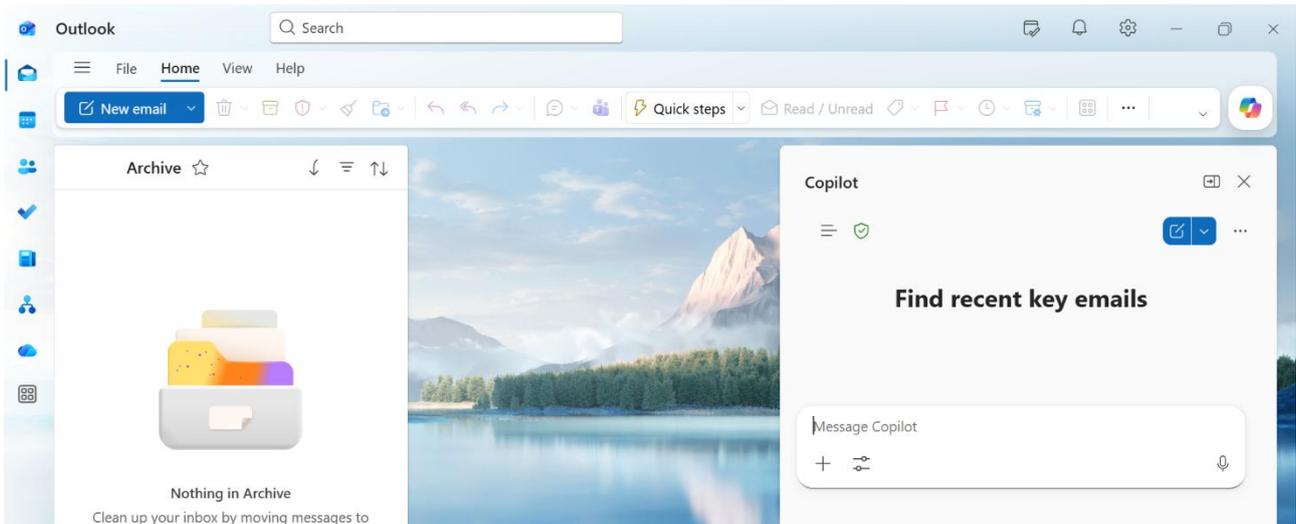You can find the Copilot app in the menu ribbon in Outlook – look for the icon at the right-hand side.

Copilot app

Find the Copilot app on your computer by clicking the **Start button** on your computer's **taskbar**.
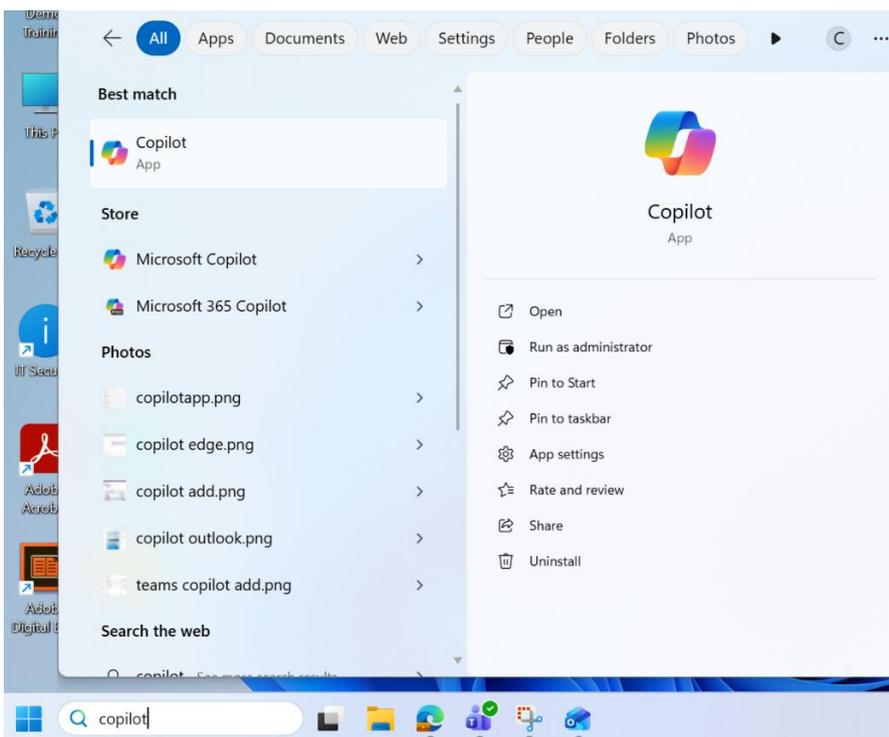
Can't find the app on your computer? Download it from Microsoft at [Copilot App on Windows, Mac, Android & iOS](#). The app is currently only available to staff using the Windows operating system.

How do I use it?

Once you log in, you'll see a chat box. This is called the **compose box**. Begin typing or explore the options along the menu sidebar.
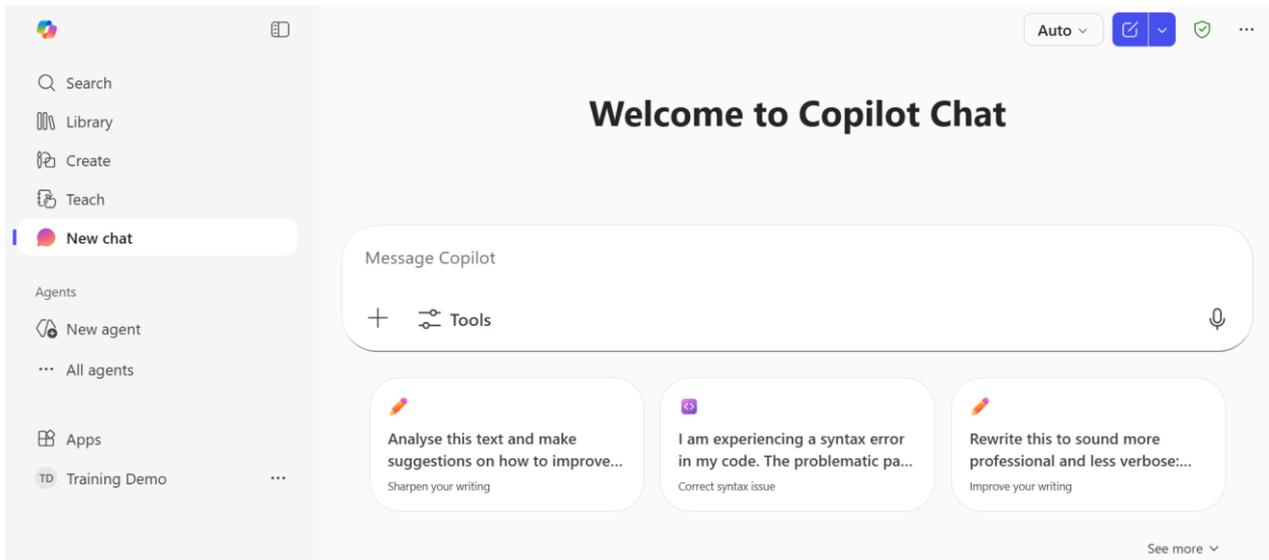
You interact with Copilot by typing text into this box – this text is known as a **prompt**. Copilot will use its previous training to craft a response. Once the response is generated, you can type more prompts – Copilot works best when you give it clear directions and have an ongoing dialogue.

You can also interact with Copilot using your voice – click the **Microphone icon** in the bottom right of the **compose box**.

Quick start guide

1. **Use a 3-part prompt** (keep it one or two sentences):
   Purpose + Context + Format (e.g., tone/length/format). Gen AI Text Prompt Guide
2. **Be explicit** about the response you want – task, situation, bullet points, or headings.
3. **Iterate with micro-edits** – for example "shorter," "more formal," "add an example," "turn into steps."
4. **Ask Copilot to "show its working"**
   Prompt it to *explain the steps it took*, *list the sections/sentences it relied on*, or *add a checklist of assumptions* so you can verify quickly.

Upload/attach a file

Click the **plus icon** (**+**) to attach or upload a file. You can also paste images or files into the compose box – just copy your item, click the compose box and hit **Ctrl** + **V** on your keyboard.
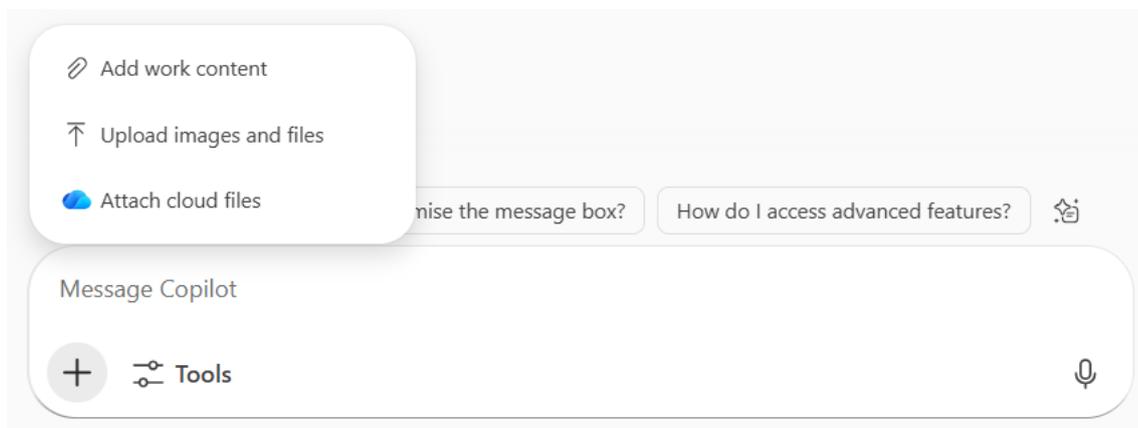
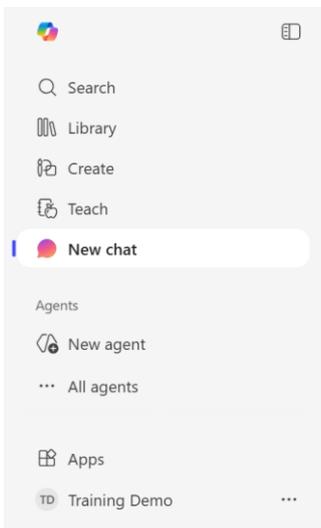### Search across your OneDrive files

You can search across OneDrive files by typing **a forward slash** (**/**) then a keyword into the message box.
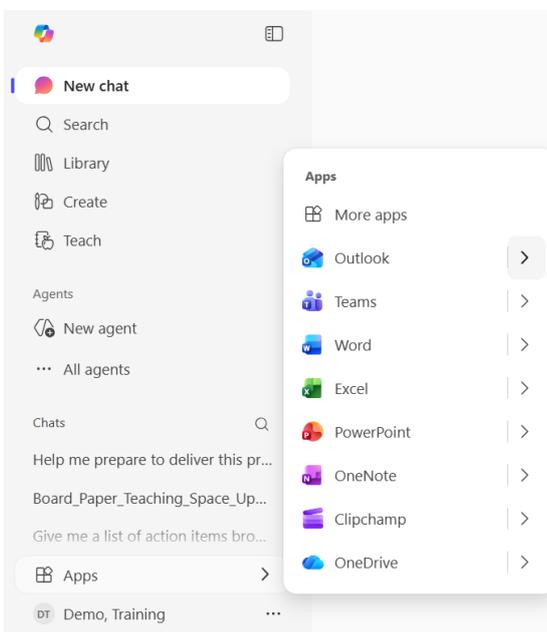
Navigation pane

You will see a navigation pane at the left side of the screen – further guides will go into how to use these functions.

App launcher

Quickly open other Microsoft apps by clicking **Apps** in the navigation pane.

Start a new chat

You can start a new chat by clicking on **New chat** in the navigation pane.
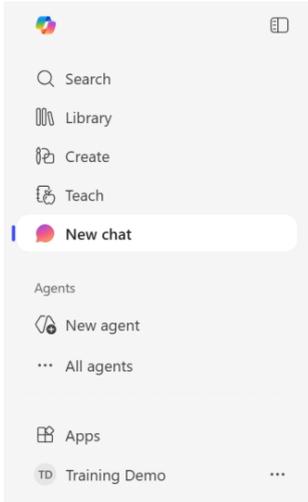
You can also start a new chat by clicking the [icon] button in the top-right corner of the page.

Temporary chats

Nothing you write or generate in temporary chats is stored in your personal chat history. When the session ends or you close the window, the chat disappears and cannot be resumed. This ensures the chat stays completely isolated from your normal Copilot usage.

To start a temporary chat, **click the dropdown arrow** on the blue **New chat button**, and select **Temporary chat**.
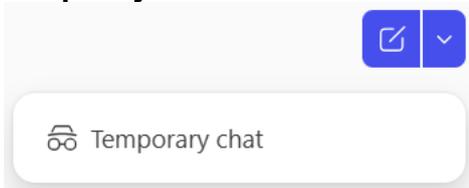
Even though chats don't appear in *your* history, Microsoft 365 retention, auditing, or eDiscovery policies may still temporarily retain them. Admins may access them within that retention window.

View your chat history

You can reopen your past chats with Copilot to continue the conversation or review the content. Find these in the **Navigation panel**.
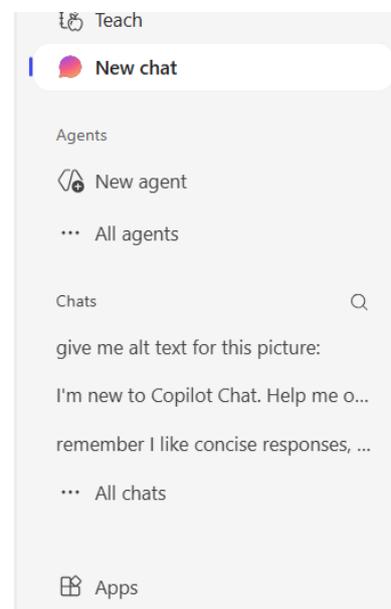
Hover over any conversation and **click the ellipsis (…)** to rename or delete a chat. Deleting a chat removes any memories or content created within this chat.
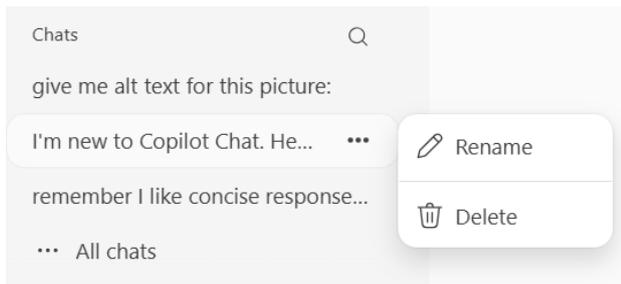
Types of response

You can select how you want Copilot to answer – you can specify if you want a quick answer or if you want it to 'think' more deeply.

Quick response uses a fast model. It's useful for simple, more common tasks and generates a response almost instantly. This uses less computing power.

Think deeply uses a reasoning model and breaks tasks down into steps. It's better for more complex, nuanced tasks but you may wait for up to a minute for a full answer. This uses more computing power.

You can choose the type of response you want from Copilot by clicking the drop down at the top-right of the screen – it's set to **Auto** as standard, but you can force it to keep using either setting by clicking the option on the dropdown.
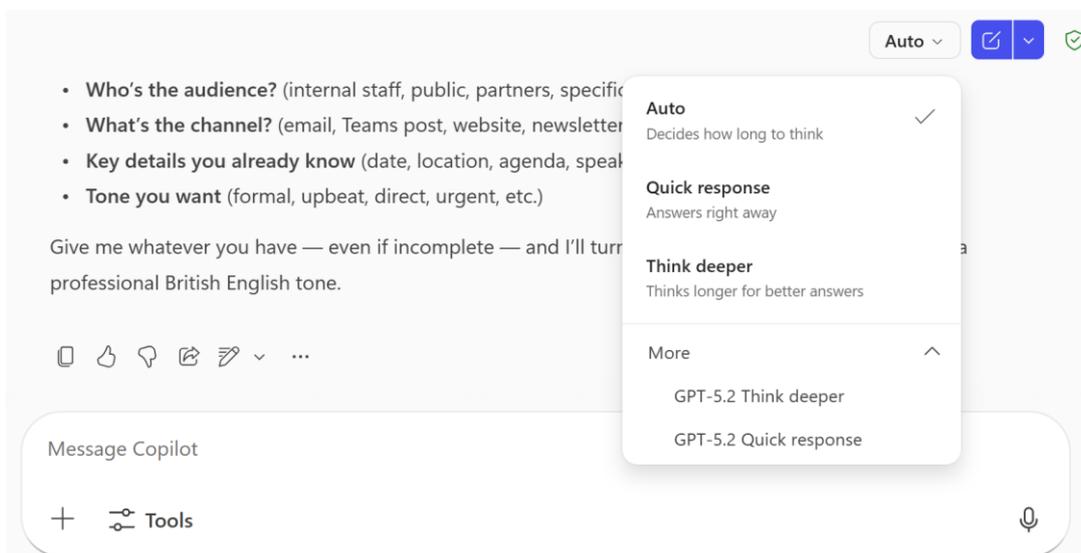
How secure is it?

Microsoft 365 Copilot is safe for university data because it follows the same trusted enterprise protections as other Microsoft 365 services like Exchange and SharePoint. All prompts and responses are encrypted, kept private, and never used to train AI models.

Copilot respects your existing access controls, sensitivity labels, and retention policies, and complies with GDPR and other major data protection standards. It also includes safeguards against AI-related risks and copyright issues, ensuring your data remains secure and under your control.

⚠️ The University of Aberdeen asks that staff **do not input sensitive personal data** into GenAI tools **under any circumstances**, in accordance with our governance policies.

What does Copilot have access to?

At present, Copilot **only has access to your Microsoft 365 profile, Outlook emails, and shared files** – this is because the university only subscribes to the **free version** of Copilot. It can interact with files in your personal OneDrive folders that you've shared with others, or ones that colleagues have shared with you.

It does not have access to:

- Outlook calendars
- Teams chats or groups
- Any documents held in SharePoint

It is not available inside apps such as:

- Excel
- Forms
- OneNote
- Power Apps
- PowerPoint
- SharePoint
- Stream
- Whiteboard
- Word

What can I use it for?

You could use it for a variety of tasks, including:

- Text based
    - Drafting – suggest wording for emails, documents, and communications
    - Polishing tone and readability
    - Rewriting text for different audiences
    - Summarising – simplifying long documents or emails
    - Generating quick quizzes or discussion prompts
    - Creating a slide outline from your notes
    - Restructuring text
    - Extracting to-do items from an email thread or document and group them by owner
    - Producing sample data for training
- Ideation and first drafting
    - Suggest a lesson plan or session outline
    - Brainstorming or idea exploration
    - Create a rubric skeleton
    - Generate slides for a presentation
    - Generating images
- Converting documents into different formats

Prompt gallery

Struggling for ideas and want to see examples? Try browsing the **Prompt gallery**.

	Add prompts for data visualization	Include prompts for creative writing	

> Message Copilot
>
> + ⚙ **Tools** 🎤

Above the compose box, you'll see some suggested prompts. Clicking the 🗒 icon at the right-hand side takes you to the Prompt gallery. You can browse suggested prompts here, or filter prompts by different categories.

Copilot Prompt Gallery ⚙ ✕

[**Suggested**] [Your prompts]

Task ▾	Job type ▾	Copilot agent ▾

🖌 Class rubric helper

Create a winning rubric for success in my **[Intro to Psychology]** course

▦ Microsoft suggested… 🔖 ↗

✅ Quick lesson plans

Draft a fun lesson plan to teach 5th graders about **[photosynthesis]**

▦ Microsoft suggested… 🔖 ↗

❓ Classroom fun

Give me three maths jokes for my 6th grade class

▦ Microsoft suggested… 🔖 ↗

How can I personalise it?

Custom instructions and saved memories

Custom instructions and saved memories are a useful way to specify how you'd like Copilot to respond to your prompts. They act as persistent guidelines and context: Copilot applies them automatically across conversations or agents. This helps you to reduce re-prompting and makes outputs more consistent with your preferences and standards.

Adding custom instructions

1. Click the ellipsis (…) in the top-right corner of Copilot.
2. Select **Settings**.
3. Click **Personalisation**.
4. Click the **toggle button** on **Custom instructions** to turn this setting on, then click **Edit instructions** to add your own.
5. Choose from suggested wording or type your own text.
6. Click **Save instructions**.

> 💡 You'll figure out what you like (or don't!) as you use Copilot.

Try adding Custom instructions asking Copilot to always provide an external source of evidence for any information.

← | Chat settings

← Personalisation   ✕

⚙ General

▥ Data controls

👥 **Personalisation**

⟨/⟩ Agents

Custom Instructions

Add details you want Copilot to know about you and specify how you would like it to format its responses.

Add your own custom instructions or choose from the suggestions

Adopt a sceptical, questioning approach. Criticality is key. Evidence any information given - provide an external source of verification. Use a professional, but not overly formal, tone. Use British English spellings and tone. Be innovative and think outside the box. Take a forward-thinking view. Readily share strong opinions. Don't be overly flattering.

+ Give honest feedback   + Use clear and simple language

+ Prioritise my manager   + Highlight decisions in meeting notes

Adding saved memories

As part of your prompt, ask Copilot to remember something. For example, you could type **Remember I prefer concise replies**. You'll see a note under your prompt saying **Memory updated** once Copilot has saved this.

Remember, never use emojis

📝 Memory updated

⟨/⟩ **Copilot** ⓘ

Reasoning completed in 2 steps ›

Understood—no emojis. I'll keep replies concise by default.

Any other standing preferences (tone, structure, citation format)?

Viewing/deleting saved memories
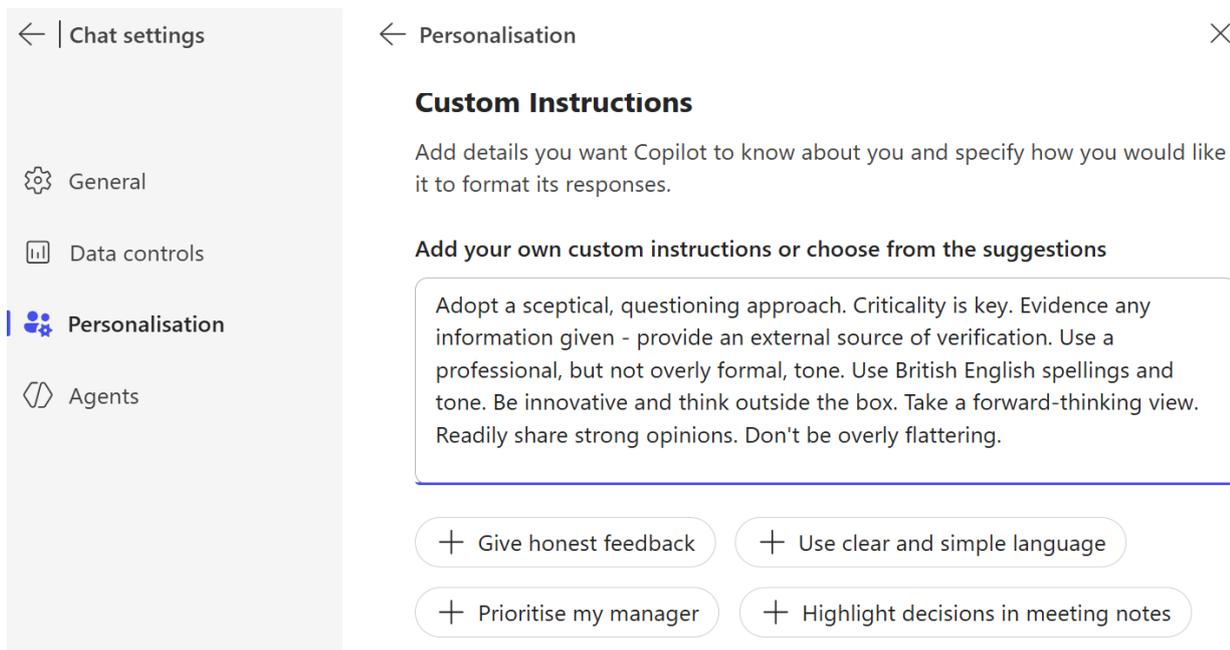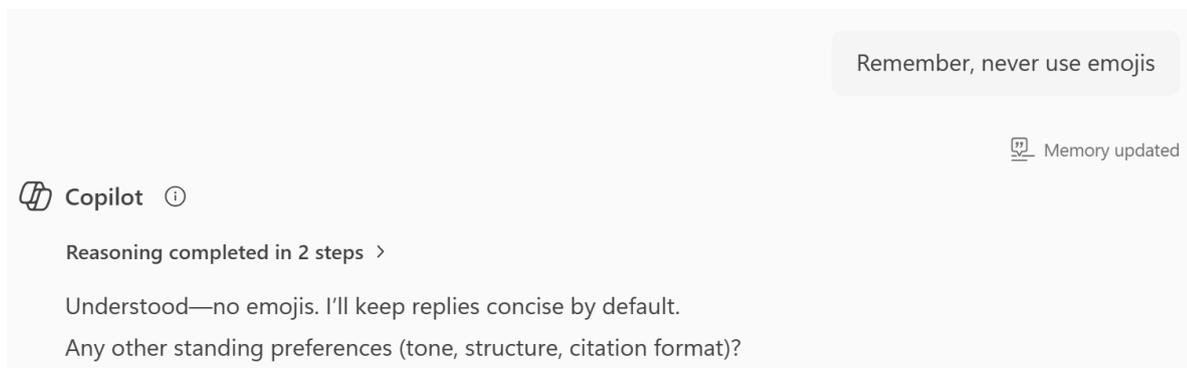
1. Click the ellipsis (...) in the top-right corner of Copilot.
2. Select **Settings**.
3. Click **Personalisation**.
4. Click the **toggle button** on **Saved memories** to turn this setting on. To see what Copilot has saved, click **Manage saved memories**.
5. Delete memories by hovering over the individual memory and clicking the Bin icon or click **Delete all memories**.

← Personalisation   ✕

Saved memories

Copilot responses will become more personalised as you chat, using inferences from your conversation.

| Prefers citations as descriptive hyperlinks | 🗑 |

Never uses emojis

Prefers concise responses

Delete all memories

Further information and help

− This resource was created by the AI Learning Lab, part of the university's Digital Skills Team. Find more information and upcoming training on our SharePoint site.

− Check out our other guides on Toolkit.

− Use MyIT to log a call with the IT Service Desk: myit.abdn.ac.uk/

− If you want to learn in more detail you can use Microsoft's Copilot Chat help & learning for tutorials, videos and helpful hints.