



WEBINAR TRAINING SERIES

# MOVE365 Learn

## Getting Started with

# Copilot Chat in Browser

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Empowering Financial Institutions with  
**AI-Powered Productivity**

# Agenda



## MODULE 01

### Get Started with Microsoft 365 Copilot Chat

Interface anatomy, secure access, and enterprise data protection fundamentals.

1

## MODULE 02

### Write Effective Prompts to Achieve Optimal Results

Prompt engineering patterns, best practices, and avoiding hallucinations.

2

# Presenter Bio



## Mohammed Arif, PhD

LEAD DATA SCIENTIST

Big Data | Machine Learning | AI

CONNECT ON LINKEDIN

 /arifmazumder

### Professional Background

Mohammed Arif has more than **eighteen (18) years** of working experience in the Information Communication and Technology (ICT) industry.

The highlights of his career include more than **seven (7) years** holding various senior management and/or C-Level positions. He has gained **five (5) years** of international ICT consultancy exposure across various countries (APAC and Australia), specifically focusing on the Big Data, Data Engineering, Machine Learning, and AI arena.

He is also a Certified Trainer for Microsoft & Cloudera, bringing deep technical expertise to enterprise training environments.

### Certifications & Expertise



**Microsoft Certified**

Azure Data Scientist Associate



**Microsoft Certified**

Azure Data Engineer Associate

**Cloudera Certified Associate**

Spark & Hadoop Developer



**Microsoft Certified Trainer**

MCT

# Related Resources



**DIRECT ACCESS**

## Scan to Access Training Materials

Get instant access to the presentation slides, prompt templates, and additional learning resources for your Microsoft 365 Copilot journey.



RESOURCE URL

[arif.works/copilotchat](https://arif.works/copilotchat)



**Scan with mobile**

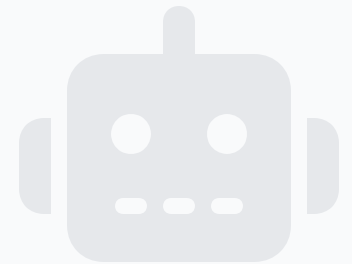
iOS & Android Compatible

MODULE 01

# Get Started with Microsoft 365 **Copilot Chat**

Discover the fundamentals of your new AI-powered assistant. Learn interface anatomy, secure access methods, and enterprise data protection standards.

COPIL



# Microsoft 365 Copilot Chat Features



Key capabilities available in your subscription



SECURITY

## Secure AI Chat

Enterprise-grade chat grounded in the web and powered by the latest GPT models, ensuring accurate and up-to-date responses.



INTEGRATION

## Side-by-Side View

Context-aware assistance that works alongside your open content in Word, Excel, PowerPoint, OneNote, and Outlook.



EXTENSIBILITY

## Pay-as-you-go Agents

Access specialized agents directly from chat, priced on a metered basis to extend capabilities as needed.



GOVERNANCE

## IT Controls & EDP

Comprehensive enterprise data protection (EDP) and robust management tools for agent deployment and security policies.



PRODUCTIVITY

## Advanced Capabilities

Enhanced features including Copilot Pages for collaboration, file upload for analysis, and AI image generation.

# How to Access Copilot Chat



PART 1 OF 2: WEB & EDGE ACCESS



## Important Requirement

You must sign in using your **work email account** to access enterprise features and data protection. Personal accounts do not have the same security coverage.

1


## Web Browser Access

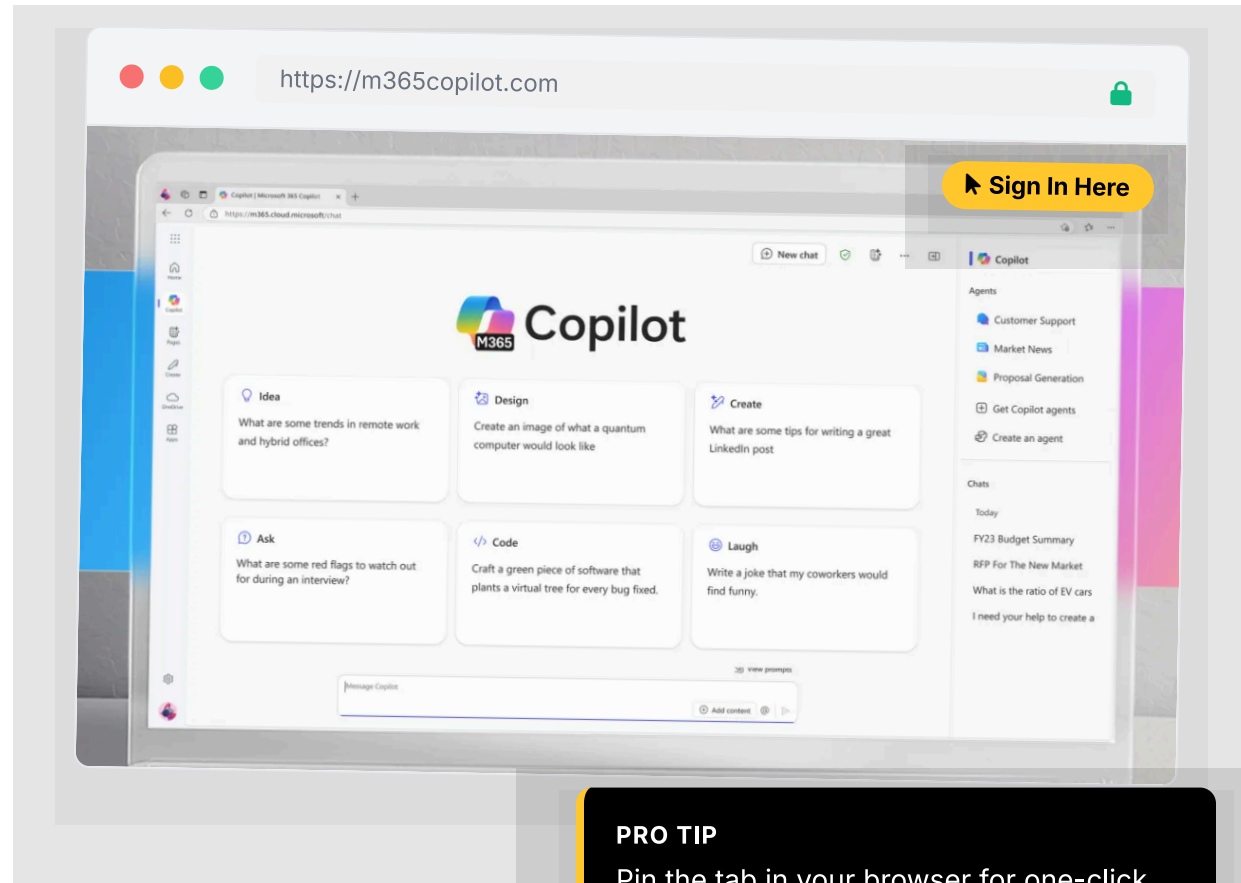
Navigate directly to the dedicated portal:

[m365copilot.com](https://m365copilot.com)

2

## Microsoft Edge Integration

Select the  **Copilot icon** in the top right corner of the Edge browser sidebar for instant access alongside any webpage.



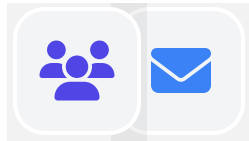
### PRO TIP

Pin the tab in your browser for one-click access every morning.

# How to Access Copilot Chat (2/2)



Application Integration Points



HUBS

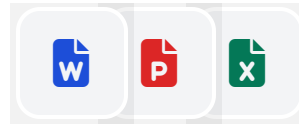
## Teams & Outlook

Primary communication hubs offering integrated chat experiences.

Win Mac Web Mobile

- ✓ **Full Chat Experience**  
Comprehensive chat interface
- ✓ **Side Pane**  
Quick assistance panel

➤ *Select Copilot icon from left-side menu bar*



CREATION

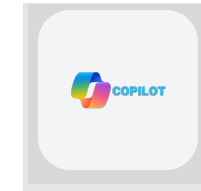
## M365 Apps

Word, PowerPoint, Excel, OneNote.  
Productivity apps for content creation.

Win Mac Web Mobile

- 📄 **Side Pane Only**  
Contextual assistance within document
- ✍️ **Drafting Engine**  
Create, edit, and summarize content

➤ *Select Copilot icon in upper-right ribbon*



DEDICATED

## Copilot App

Dedicated standalone application for focused AI interaction.

Desktop Mobile

- 🚀 **Immersive Experience**  
Full-screen dedicated chat environment
- 🔄 **Cross-Device Sync**  
Seamless transition between mobile & desktop

⬇️ *Download via App Store or Microsoft Store*

# Microsoft 365 Copilot Chat Interface



Navigating the key elements of your AI assistant

**Agents**  
Choose an agent from the list to chat with it, or expand the agent menu to find or create agents

**Chat history**  
View your past conversations

**Copilot Chat Pages**  
View your Pages that you've created

**Add content**  
Expand to add reference files or images to your Copilot prompt

**Start a new chat button**  
Clear your past chat and start a new conversation.

**Prompt box**  
Start your conversation here

**Dictation**  
Use dictation if you prefer to speak rather than type when you're chatting with Copilot

**Suggested prompts**  
Get started with prompt suggestions personalized to you.

**Copilot Prompt Gallery**  
Expand the suggested prompts to view the full Copilot Prompt Gallery, including saved prompts and prompts from your team

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# How to Chat in 3 Steps

Mastering the Copilot Conversation Loop



## 1 Enter your prompt


Enter your detailed prompt in the text box at the bottom. Be specific about your context and goal.

 Upload reference files by selecting the **"Add content"** button.



## 2 Check sources


Copilot Chat is transparent. Always review the citations listed underneath the answer.

 Vet these sources and validate your answers for accuracy.



## 3 Continue the conversation

Ask follow-up questions to refine the output. Try prompts like "Write a shorter answer" or "Give me more detail."

 Select **suggested prompts** to explore new directions.

# The Green Shield: Enterprise Data Protection



Four Pillars of Security & Compliance

## No Model Training

Your data, prompts, and responses are **never** used to train the base Large Language Models (LLMs). Your IP remains yours.

## Tenant Boundary

Data processing stays strictly within your specific Microsoft 365 tenant boundary. It does not leak into the public web or other tenants.

## Enterprise Encryption

Your data is protected by enterprise-grade encryption both **at rest** and **in transit**, adhering to rigorous security standards.


## Permissions Inheritance

Copilot automatically respects all existing permissions. It only sees and surfaces content that **you** already have permission to access.



EDP ACTIVE



Look for the  **Green Shield** icon in the top right corner of the Copilot interface to confirm protection is active.

# Knowledge Check

Test your understanding with a real-time Copilot quiz



## Interactive Learning

Engage directly with Copilot

Use the prompt on the right to initiate a personalized quiz session about Module 1 concepts.

- ✓ Accessing Copilot Chat
- ✓ Understanding Grounding Modes
- ✓ Enterprise Data Protection (EDP)

**i** Copy and paste the prompt into your Copilot Chat window to begin.



### >\_ Prompt to use in Microsoft Copilot Chat:

Copy Prompt

```
"As a Microsoft Copilot Chat expert, please create three multiple-choice questions that assess knowledge of key features, including how to access Copilot Chat, its different modes, how to initiate it, and the concept of EDP. Present one question at a time and wait for my response before continuing. After each answer, provide a brief explanation of the correct choice before moving on to the next question."
```

Generates 3 Questions

~5 Minutes

# Module 1 Summary

Recap: Getting Started with Copilot Chat



## Achievement Unlocked

Now you're ready to get started with Microsoft 365 Copilot Chat.



Describe the purpose and key features of Microsoft 365 Copilot Chat



Identify where and how to access Copilot Chat across Microsoft 365 applications



Describe how web grounding delivers real-time answers vs. work grounding



Navigate the Copilot Chat interface and how to start chatting



Describe how Enterprise Data Protection keeps your data secure while using Copilot Chat

# Write Effective **Prompts** to Achieve Optimal Results

Master the art of prompt engineering. Learn the core elements of effective prompts, best practices, and how to use the Prompt Gallery for maximum productivity.

COPY



# Write an Effective Prompt

The Four Essential Ingredients of a Perfect Prompt



1

## Context

Why do you need it and who is involved? Provide background info to ground the AI.

THE "WHY"



2

## Goal

What responses do you want from Copilot? Be clear about the specific outcome you need.

THE "WHAT"



3

## Source

Which information sources or samples should Copilot use? Reference specific files or data.

THE "WHERE"



4

## Expectations

How should Copilot respond? Define the format, tone, and style to best meet your needs.

THE "HOW"

# Write an Effective Prompt

Dissecting a Well-Structured Request



## > EXAMPLE PROMPT

I work in marketing and focus on competitor research.

Give me a concise summary of recent news about [company name].

Focus on web articles from the last 2 months.

Provide the answer in two to three paragraphs and use a business tone.



### Context

Why do you need it and who is involved?

"I work in marketing..."



### Goal

What responses do you want?

"Concise summary of news..."



### Source

Which info sources to use?

"Web articles, last 2 months"



### Expectations

How should Copilot respond?

"2-3 paragraphs, business tone"

Hover over the cards to see how they map to the prompt above.

# Prompting Best Practices

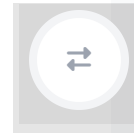
DO'S AND DON'TS FOR OPTIMAL RESULTS



## The Do's

RECOMMENDED

- ✓ Be clear and specific
- ✓ Keep it conversational
- ✓ Give examples to guide output
- ✓ Ask for feedback ("Did I miss anything?")
- ✓ Write legibly and use proper grammar
- ✓ Check for accuracy and validate sources
- ✓ Provide context and details
- ✓ Be polite and professional
- ✓ Iterate and refine your prompt (V1 → V2)



## The Don'ts

AVOID

- ✗ **Be vague**  
Avoid broad requests like "Write something about X"
- ✗ **Request unethical content**  
Copilot will block inappropriate or harmful requests
- ✗ **Use slang or jargon**  
Informal language can confuse the context
- ✗ **Give conflicting instructions**  
E.g., "Write a long report but keep it under 50 words"
- ✗ **Interrupt abruptly**  
Changing topics without context can lose the thread



**PRO TIP:** Treat Copilot like a new intern. Review the work, give clear feedback, and ask for revisions.

# Prompting Best Practices



Detailed comparison of High-Yield Tactics vs. Common Errors

## ✓ High-Yield Tactics (Do)

### 🔄 Iterate & Critique

EXAMPLE:

*"Critique your response for accuracy and tone. Does this align with a formal business context?"*

### 🔗 Check Sources

EXAMPLE:

*"Summarize the Q3 financial report. Provide live links to the official source documents."*

### 📋 Chain of Thought

EXAMPLE:

*"First, outline the main challenges. Second, propose three distinct solutions. Finally, weigh the pros and cons of each."*

### 💬 Ask for Feedback

EXAMPLE:

*"After generating the checklist, ask: Is there any critical information missing from this project plan?"*

## ✗ Common Errors (Don't)

### ☁ Vagueness

AVOID:

~~"Write a report about sales."~~

Instead: "Tell me about the sales performance for Q3."

### 🗨 Slang / Jargon

AVOID:

~~"Give me the 411 on the new marketing vibes. Keep it lit."~~

Context confusion leads to poor results.

### ⚡ Conflicting Instructions

AVOID:

~~"Write a comprehensive analysis but keep it to a single short paragraph."~~

### 🔀 Topic Mixing

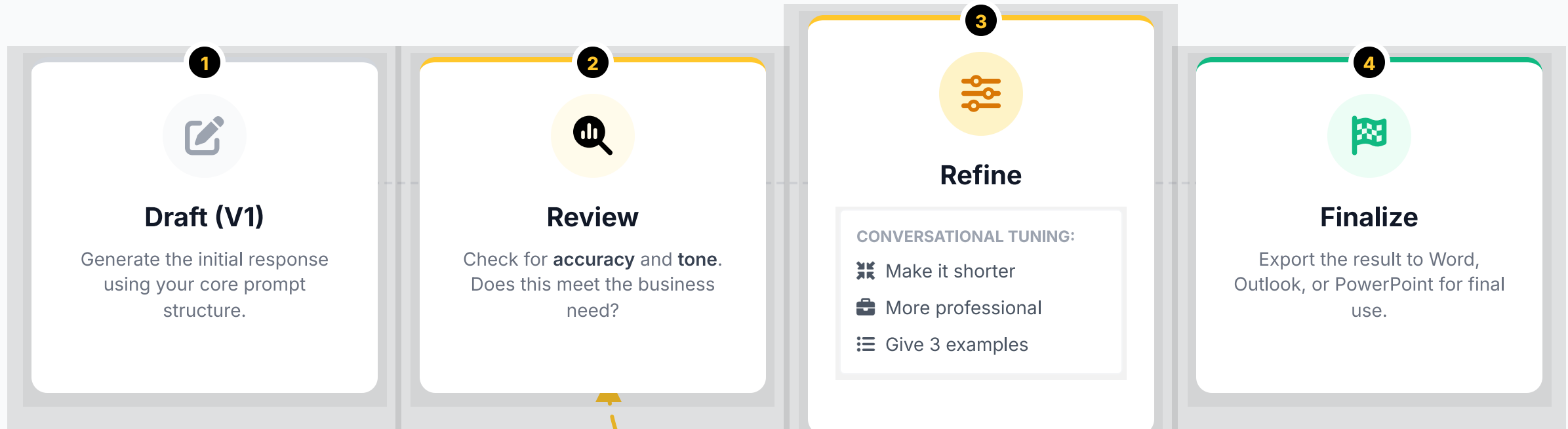
AVOID:

~~"Draft a Gantt chart. Also, what are the top 5 beaches in Hawaii?"~~

Keep chats focused on one topic.

# The Art of Iteration

Don't Stop at V1: The Iterative Workflow



## TRAINER TIP



"Treat Copilot like a **new intern**. You wouldn't throw a file at an intern and walk away. You review the work, give feedback, and ask for revisions. Do the same here."

# Examples of Web-based Prompts



Practical applications for daily tasks using web grounding

## ⚡ QUICK TASKS

Fast Execution • Simple Prompts



1

### Revise Content

EDITING

"Can you help me rewrite this paragraph to make it clearer and more concise?"



2

### Generate Ideas

BRAINSTORMING

"List ideas for a fun remote team building event."



3

### Start Research

RESEARCH

"How have world literacy rates changed in the past 30 years?"

## 📁 DEEP WORK

Complex Reasoning • Detailed Output



4

### Code Faster

DEVELOPMENT

"Write a Python script to perform binary search."



5

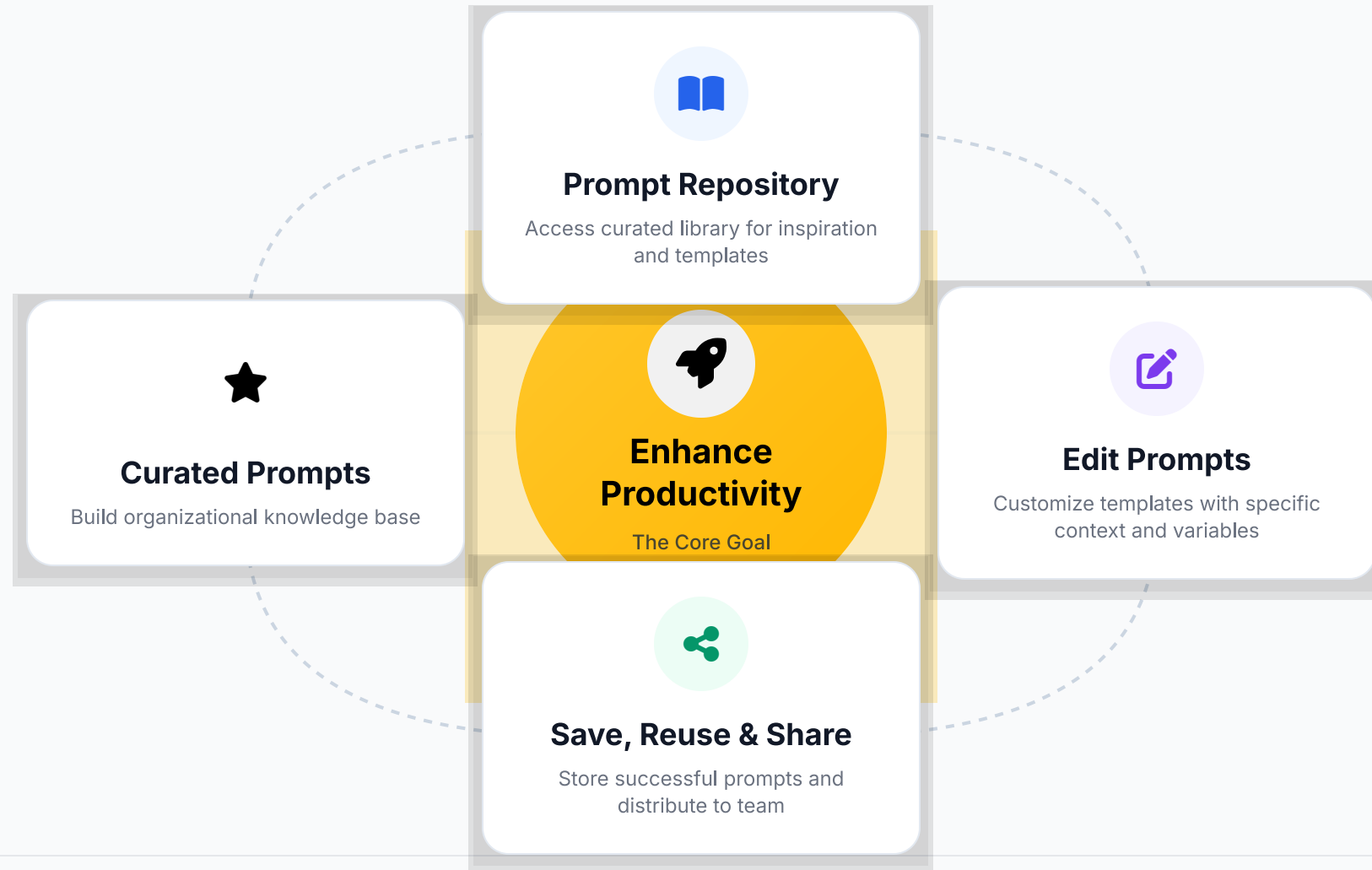
### Draw Conclusions

ANALYSIS

"Help me analyze the data from my experience using this /file."

# Get Inspired with Copilot Prompt Gallery

The Virtuous Cycle of Productivity



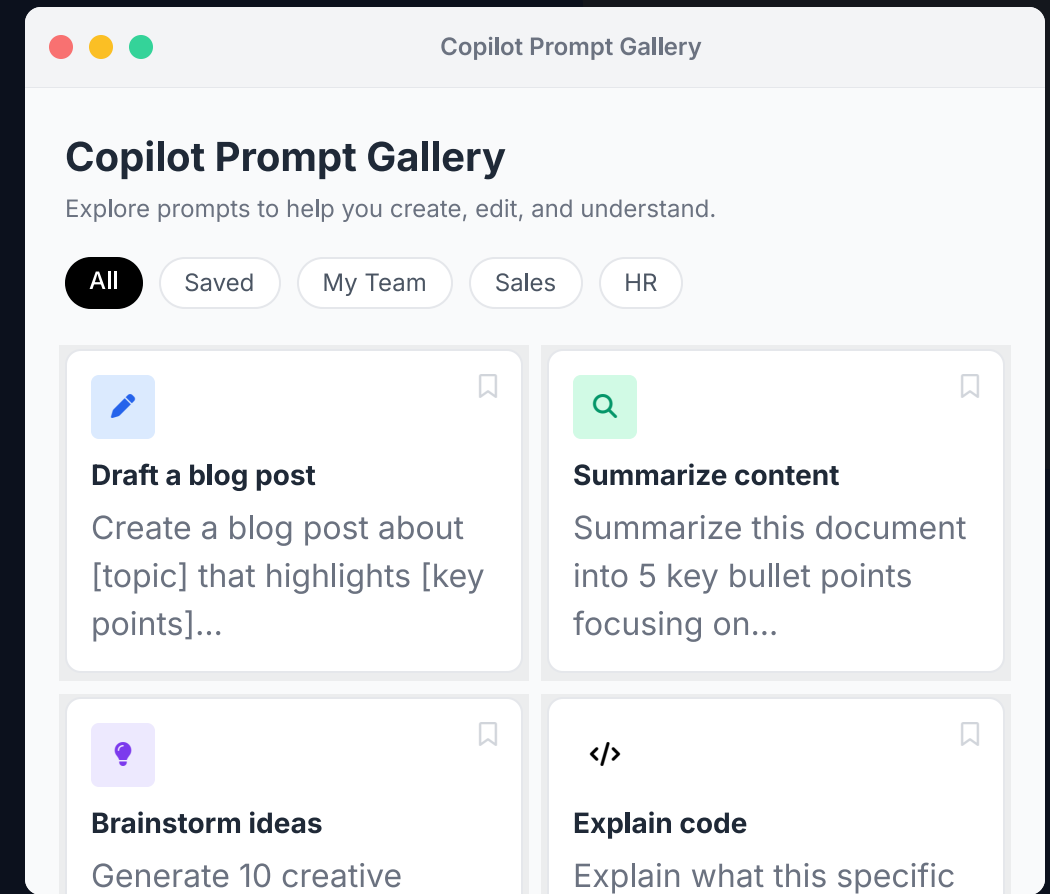
# How to Use the Prompt Gallery



## Access & Exploration

Find prompting inspiration to take greater advantage of Copilot in your daily work.

- 1 Locate Suggestions**  
In the chat interface, look for the initial prompt suggestions.
- 2 Expand View**  
Select **See more** to reveal additional options.
- 3 Open Gallery**  
Click the **Prompt Gallery** button at the bottom of the list.



# Prompt Gallery Workflow

Creating reusable assets for your team



1



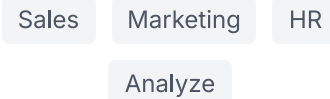
## Access Gallery

Click the **Prompt Gallery** button directly within the Copilot Chat interface to browse available collections.

2



## Filter by Role



Narrow down options by specific job roles or tasks to find relevant starting points.

3



## Save Custom Prompts

Found something that works?  
Save useful prompts to your personal collection for quick future access.

4



## Name & Template

Edit the title for clarity and insert dynamic placeholders.

[Insert File Name]



### KEY INSIGHT

Pro Tip: Use placeholders like [Insert File Name] to create reusable templates for your entire team.

# Knowledge Check (Module 2)

Test your prompting skills with a real-time Copilot quiz



## Interactive Learning

Master the art of prompting

Use the prompt on the right to initiate a personalized quiz session about Module 2 concepts.

- ✓ Elements of Effective Prompts
- ✓ Avoiding Common Mistakes
- ✓ Using the Prompt Gallery

 Copy and paste the prompt into your Copilot Chat window to begin.



### >\_ Prompt to use in Microsoft Copilot Chat:

 Copy Prompt

```
"As a Microsoft Copilot Chat expert, please create three multiple-choice questions focused on the elements of well-crafted prompts, common mistakes to avoid, and the purpose of the Microsoft Copilot Prompt Gallery. Present one question at a time and wait for my response before continuing. After each answer, provide a brief explanation of the correct choice before moving on to the next question."
```

 Generates 3 Questions

 ~5 Minutes

# Module 2 Summary

Recap: Writing Effective Prompts



## Achievement Unlocked

You're now able to write effective prompts and use the Copilot Prompt Gallery.



Identify the four elements of an effective prompt: context, goal, source, and expectations



Apply best practices for clear, concise, and well-structured prompts



Recognize common prompting mistakes and how to avoid them



Utilize the Microsoft Copilot Prompt Gallery to discover, save, edit, and share useful prompts

# What's New in 2026

## Copilot Feature Highlights

📅 February 2026 Release



NEW MODEL

### GPT-5 & Model Selector

GPT-5 is now default. Use the new selector to switch between **Quick Response** for speed and **Think Deeper (GPT-5.2)** for complex reasoning.



MAJOR UPDATE

### Agent Mode & Agents

Copilot actively edits files with transparency in Word/Excel/PPT. Generate full drafts from a single prompt via Chat using specialized Agents.



UPDATED

### Outlook Intelligence

Hands-free Voice Catch-up on mobile. Implicit grounding adds email context automatically. Natural-language triage and auto-replies.

ENTERPRISE READY

### PowerPoint Brand Assets

Auto-integrates enterprise brand assets from SharePoint OAL or Templafy. Now works on view-only files for summarization.



WORKFLOW

### Excel Local & Analysis

Copilot now supports locally stored modern workbooks. Enhanced Python integration for advanced financial analysis and visualization.



CONTROL

### Admin & Governance

Custom AI disclaimers, Purview DLP integration, and granular connector controls (Google Drive, Dropbox). New Copilot Dashboard insights.

# Prompt Engineering for Financial Services

The Winning Pattern for High-Fidelity Results



## THE FORMULA:

**ROLE**

Who is AI?



**TASK**

What to do?



**CONTEXT**

Background



**SOURCES**

Data origin



**CONSTRAINTS**

Guardrails



## Precision & Context

- ✓ **Be Specific on Metrics**  
Clearly define period (Q2 2026), currency (MYR), and scope (SME Portfolio).
- ✓ **Ground Your Data**  
Always reference specific files, emails, or Notebooks to prevent hallucinations.
- ✓ **Use Correct Mode**  
Select **Think Deeper** for complex risk analysis, and **Quick Response** for simple triage.

### >\_ EXAMPLE PROMPT

"Act as a **Credit Risk Analyst**. Summarize the **attached Q2 SME loan report**. Focus on **NPL trends in the Manufacturing sector (MYR)**. Exclude retail exposure."



## Output & Refinement

- ✓ **Define Format**  
Explicitly ask for tables, bullet points, tracked changes, or executive summaries.
- ✓ **Audit-Ready**  
Request citations and source links for every claim to ensure regulatory compliance.
- ✓ **Iterate & Refine**  
Don't settle for the first draft. Add exclusions (e.g., "Omit retail") or refine tone.

### >\_ EXAMPLE PROMPT

"Format the output as a **table** with columns: Risk Factor, Impact (High/Med/Low), and Mitigation Strategy. Ensure tone is **formal and suitable for BNM submission**."

# Banking Scenario Gallery

Ready-to-Use Prompts for High-Impact Workflows



Note: Customize bracketed text [ ] before using



RISK MANAGEMENT

## Credit Risk Analysis

"Act as a Senior Credit Analyst. Evaluate the creditworthiness of [Company Name] based on the attached [financial statements/annual report]. Identify key risk factors, specifically liquidity ratios and debt-to-equity trends over the last 3 years. Provide a recommendation on the loan application for [Amount] MYR."



PORTFOLIO

## Loan Portfolio Review

"Analyze the attached [Loan Portfolio Excel Sheet]. Segment the portfolio by industry and risk rating. Highlight any sectors with NPLs exceeding [5%]. Summarize the exposure to [Real Estate] sector and suggest diversification strategies."



COMPLIANCE

## Regulatory Documentation

"Draft a compliance memo regarding the new [BNM Policy Document Name]. Summarize the key changes required for our [Know Your Customer (KYC)] process. Reference the specific clauses from the attached PDF and outline a timeline for implementation."

# Banking Scenario Gallery (Part 2)



Ready-to-Use Prompts for High-Impact Workflows

Note: Customize bracketed text [ ] before using



REPORTING

## Financial Performance

"Compare the Q3 financial performance of [Bank A] vs [Bank B] using the attached reports. Focus on Net Interest Margin (NIM), Cost-to-Income ratio, and ROE. Present the findings in a table format"



MARKETING

## Customer Insights

"Analyze the sentiment of the attached [customer feedback/survey data]. Identify the top 3 complaints regarding our [Mobile Banking App]. Suggest 5 actionable improvements to enhance user experience"



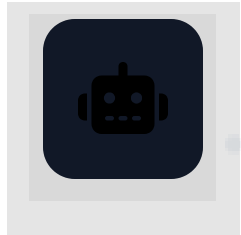
GOVERNANCE

## Committee Actions

"Extract all action items from the attached [Board Risk Committee Minutes]. Organize them by owner and due date in a table. Flag any items that are overdue based on today's date [Date]."

# What Are Copilot Agents?

Custom AI Assistants for Your Workflows



## Your Custom AI Workforce

Copilot Agents are custom AI assistants you can build directly within Microsoft 365 Copilot Chat to:

- ✔ Automate specific tasks
- ✔ Answer domain-specific questions
- ✔ Streamline complex workflows



## No Coding Required

Built entirely using natural language descriptions. Simply tell Copilot what you want your agent to do.



## Grounded in Your Data

Connects directly to your organization's knowledge sources—files, SharePoint sites, and emails—for accurate answers.



## Flexible Sharing

Create agents for your personal use or share them with specific teams and colleagues to scale expertise.



## Enterprise Security

Agents run entirely within your secure Microsoft 365 environment, backed by Enterprise Data Protection (EDP).

# Creating an Agent

The "Describe" Method & Workflow



## TWO-STEP APPROACH

STEP 1



### Describe

Tell Copilot what your agent should do using natural language. Describe its purpose, behavior, knowledge sources, and tone.



STEP 2



### Configure

Fine-tune settings manually. Adjust the name, icon, detailed instructions, specific knowledge sources (files/sites), and conversation starters.

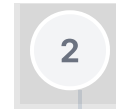


## How to Get Started



### 1 Access Copilot

Open your browser and navigate to [m365copilot.com](https://m365copilot.com) or open the Copilot app.



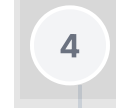
### 2 Navigate to Agents

Locate the **Agents** menu in the left sidebar navigation pane.



### 3 Initiate Creation

Click the **"Create"** or **"New Agent"** button to begin the setup wizard.



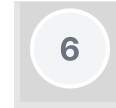
### 4 Select Method

Choose **"Describe"** to start with AI assistance, or **"Configure"** for manual setup.



### 5 Define Purpose

Provide a clear description of what the agent should do, who it serves, and what knowledge to reference.



### 6 Test & Publish

Test the agent in the preview chat window, iterate on instructions, and then publish to your team.

# Agent Configuration Options



Building a Custom Agent: The "Regulatory FAQ Bot"

## Configuration Parameters

### Identity

**Name & Description:** Defines how users find and understand the agent's purpose in the Copilot library.

### Instructions

Behavioral guidelines. Defines tone, scope, and specific rules (e.g., "Always cite the specific clause number").

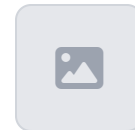
### Knowledge Sources

The "brain" of the agent. Upload files, link SharePoint sites, or add URLs for grounding answers.

### Conversation Starters

Pre-defined prompts to help users get started immediately with high-value queries.

## Configure Agent



Agent Name

Regulatory FAQ Bot

Description

Answers BNM regulatory questions based on uploaded policy documents

### Instructions

You are a compliance assistant for a financial institution. Your role is to answer questions strictly based on the provided knowledge sources.  
- Maintain a formal, professional tone.

### Knowledge sources + Add source

BNM RMIT Guidelines 2025.pdf x

Internal AML CFT Handbook.pdf x

Cancel

# Using Your Agent

Workflow & Best Practices for Deployment



## Operational Workflow



### Locate Agent

Navigate to the **"Agents"** section in the Copilot Chat sidebar to view your available assistants.



### Select from List

Click on your specific agent (e.g., "Regulatory Bot") to open its dedicated chat interface.



### Start Chatting

Use the defined conversation starters or type your query. The agent will respond based on its grounded knowledge.



### Share & Scale

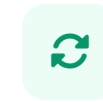
Click the share icon to send a direct link to colleagues or publish it widely to the organization

## OPTIMIZATION STRATEGIES



### Keep It Focused

Don't build a "do-everything" bot. Limit each agent to a specific domain or task (e.g., "HR Policy" vs "Sales Data") for higher accuracy.



### Update Knowledge

Regularly review connected files. Replace outdated PDFs or docs to ensure the agent doesn't provide obsolete information.



### Test Real Scenarios

Before sharing, stress-test the agent with ambiguous questions to see how it handles edge cases and refine instructions accordingly.



### Gather & Iterate

Ask users for feedback on response quality. Use their input to tweak the agent's tone, scope, and source materials continuously.

# M365 Copilot Chat Basics Training Assessment

Complete your Attendance, Feedback & Assessment



## Scan the QR Code

Use your mobile camera or code scanner app to access the form.

2

## Complete Attendance & Feedback

Fill in your details to mark your attendance and share your thoughts on the session.



## Take the Assessment

Complete the short quiz to validate your learning and finish the training module.

## Scan to Start



Please complete all sections

**Attendance • Feedback • Quiz**



Financial Institution Training