

Solution Brief

Microsoft Copilot:

A Cheat Sheet

Get up and running quickly with Microsoft's new AI-powered assistant.





Microsoft Copilot is an AI-powered productivity tool that coordinates large language models (LLMs), content in Microsoft Graph, and Microsoft 365 apps to provide real-time intelligent assistance and enable users to enhance creativity, productivity, and skills. It uses deep learning techniques and vast data sets to understand, summarize, predict, and generate personalized experiences with related context as you work.

Copilots for Every Corner of the Digital Office

Copilot is being integrated everywhere you use Microsoft apps.



Where Copilot Lives

Copilot offers advanced features and must be enabled through the proper license.

	Bing Chat	Bing Chat Enterprise	Microsoft 365 Copilot
	Personal	Work	Work
GPT Large Language Model	✓	✓	✓
AI-Powered Web Search, Answers & Content Generation	✓	✓	✓
Commercial Data Protection		✓	✓
Microsoft 365 Enterprise Security, Compliance & Privacy			✓
Microsoft 365 Graph (content & context)			✓
Microsoft 365 Apps			✓

Meaningful Relationships with Semantic Index

Semantic Index sits on top of Microsoft Graph to produce sophisticated, meaningful responses.

Semantic Index for Microsoft 365 Copilot



The Semantic Index for Copilot creates a map of organizational data.



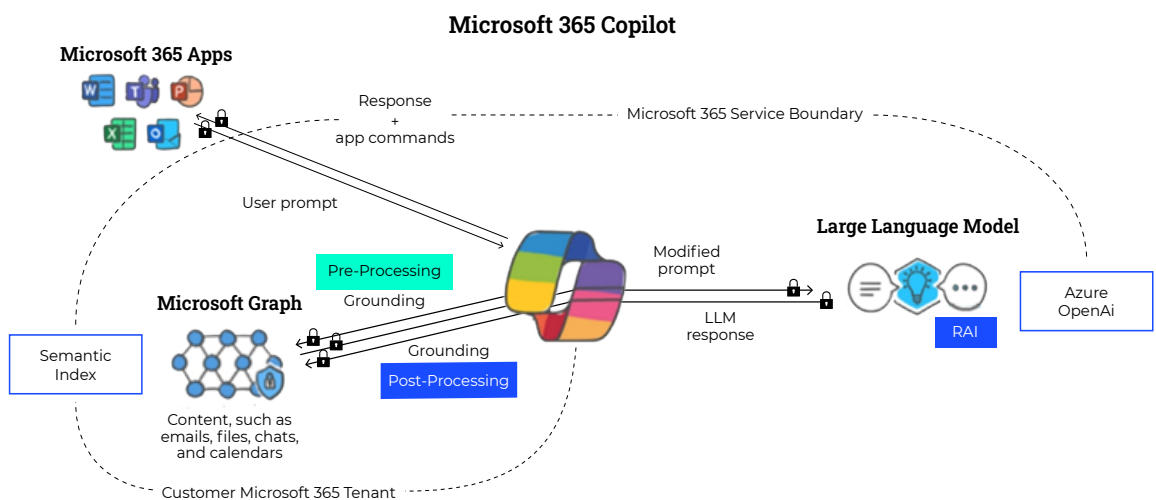
That conceptual understanding helps Copilot better understand your needs.



This enables Copilot to deliver more relevant and valuable responses to your prompts.

How Microsoft 365 Copilot Works

Microsoft 365 Copilot bases responses on your organization's data to produce contextually relevant results.



Features for Microsoft 365 Copilot

Work smarter and faster with AI-powered features across your favorite apps.

Draft with Copilot

Use prompts to draft plans, generate ideas, create lists, and more. Available in apps such as Word, PowerPoint, and OneNote.

Chat

Summarize content, ask questions about documents, and Q&A. Available in apps such as Word, PowerPoint, and Teams.

Coaching tips

Get coaching tips and suggestions on clarity, sentiment, tone, and messaging recommendations inside Outlook.

Light commanding

Add slides, pictures, or make deck-wide text changes in PowerPoint.

Summarize

Retrieve summaries of Outlook emails and threads, and automatically draft suggested replies.

Meetings

Invoke Copilot in meetings, access real-time transcripts, and get questions answered.

Whiteboard

Make meetings and brainstorming sessions more creative and interactive. Generate, organize, and summarize ideas.

Getting Ready for Microsoft Copilot in 3 Steps

1. Get Your Information Ready for Search

Provide users with just enough access to get their work done.



Identify files containing sensitive data and apply controls to limit their access

Use tools such as Microsoft Purview's Information Protection and its data classification controls to automatically apply controls to limit access to files in Teams, SharePoint, OneDrive, email, and chat.



Audit access to shared content at the site and team level

With tools such as Microsoft Syntex, find potential oversharing in SharePoint and Microsoft Teams files, then enforce restrictions to limit discovery only to users with appropriate permissions.



Put controls in place and validate access

By putting the right controls and review processes in place, you can provide users with just enough access.

2. Get the prerequisites in place

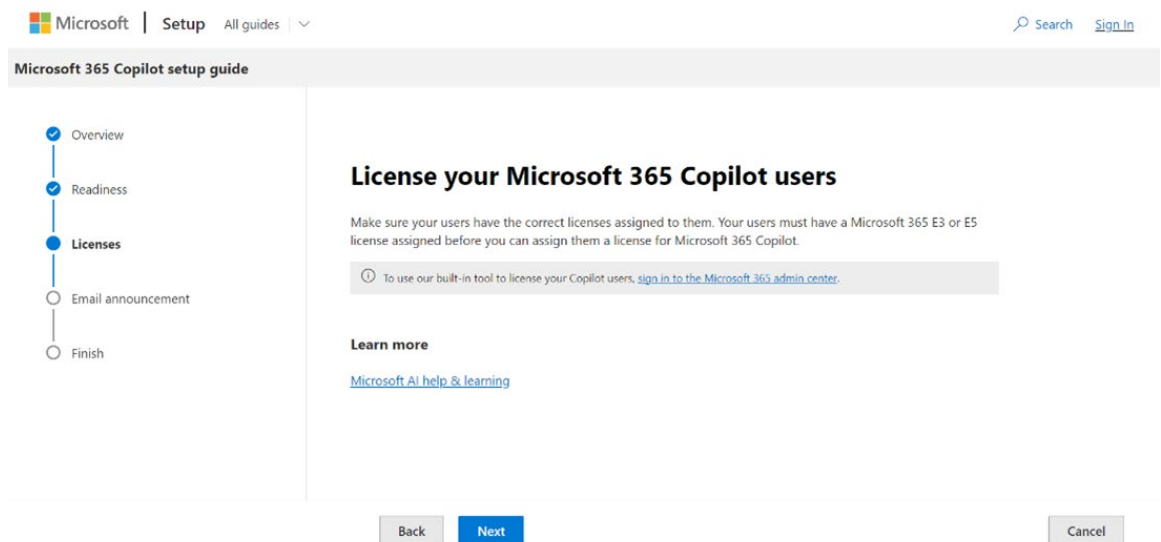
Add the right apps and services to experience the full benefits of Copilot.

- Microsoft 365 Apps for enterprise
- Microsoft Entra ID
- A Work Account in Azure Active Directory
- Microsoft OneDrive
- The New Outlook app
- Microsoft Teams
- The New Microsoft Loop experience
- Semantic Index for Copilot
- Microsoft Whiteboard

www.learn.microsoft.com/en-us/microsoft-365-copilot/microsoft-365-copilot-requirements#prerequisites

3. Assign Microsoft 365 Copilot licenses to users

Licenses can be assigned through the Copilot setup guide or the Microsoft 365 Admin Center.



The screenshot shows the Microsoft 365 Copilot setup guide interface. At the top, there is a navigation bar with the Microsoft logo, 'Setup', and 'All guides'. A search icon and 'Sign In' link are on the right. The main heading is 'Microsoft 365 Copilot setup guide'. On the left, a vertical progress bar shows five steps: 'Overview' (checked), 'Readiness' (checked), 'Licenses' (selected), 'Email announcement' (unchecked), and 'Finish' (unchecked). The main content area is titled 'License your Microsoft 365 Copilot users'. It includes a note: 'Make sure your users have the correct licenses assigned to them. Your users must have a Microsoft 365 E3 or E5 license assigned before you can assign them a license for Microsoft 365 Copilot.' Below this is a tip icon and text: 'To use our built-in tool to license your Copilot users, [sign in to the Microsoft 365 admin center.](#)' There is a 'Learn more' section with a link to 'Microsoft AI help & learning'. At the bottom, there are 'Back', 'Next', and 'Cancel' buttons.

www.setup.microsoft.com/microsoft-365/copilot-setup-guide





Modernize Your Workplace with Microsoft Copilot

Make the most of Copilot, Microsoft Modern Workplace, and AI with Logicalis.

Learn how Copilot will affect your organization, explore the full potential of Microsoft's AI-powered applications, and modernize your workplace with Logicalis, a leading Microsoft Partner.



Azure expert MSP

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www.us.logicalis.com/microsoft



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