

Solution Brief

Microsoft Copilot: A Cheat Sheet

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

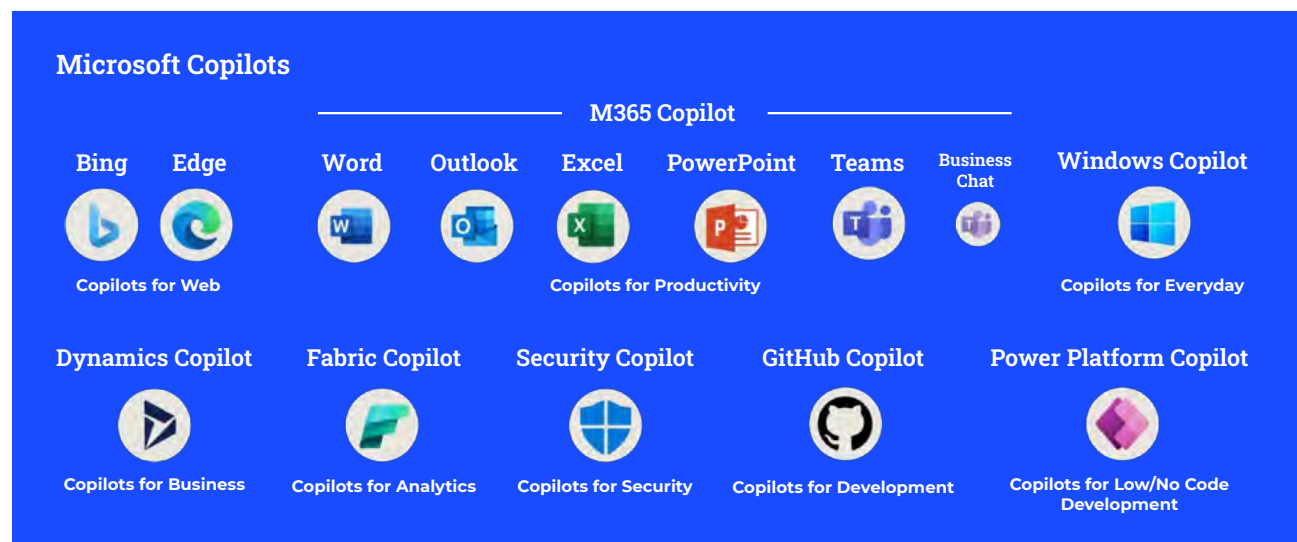




Microsoft Copilot is an AI-powered productivity tool that coordinates large language models (LLMs), content in Microsoft Graph, and Microsoft 365 apps to provide real-time intelligent assistance and enable users to enhance creativity, productivity, and skills. It uses deep learning techniques and vast 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.



Enterprise-Grade Protection, Privacy, and Security

Copilot puts data security and sovereignty first.



Data Is Protected

User and business data stays safe within the organization.



Chat Data Is Not Stored

Chat data is not stored and cannot be viewed by anyone at Microsoft.

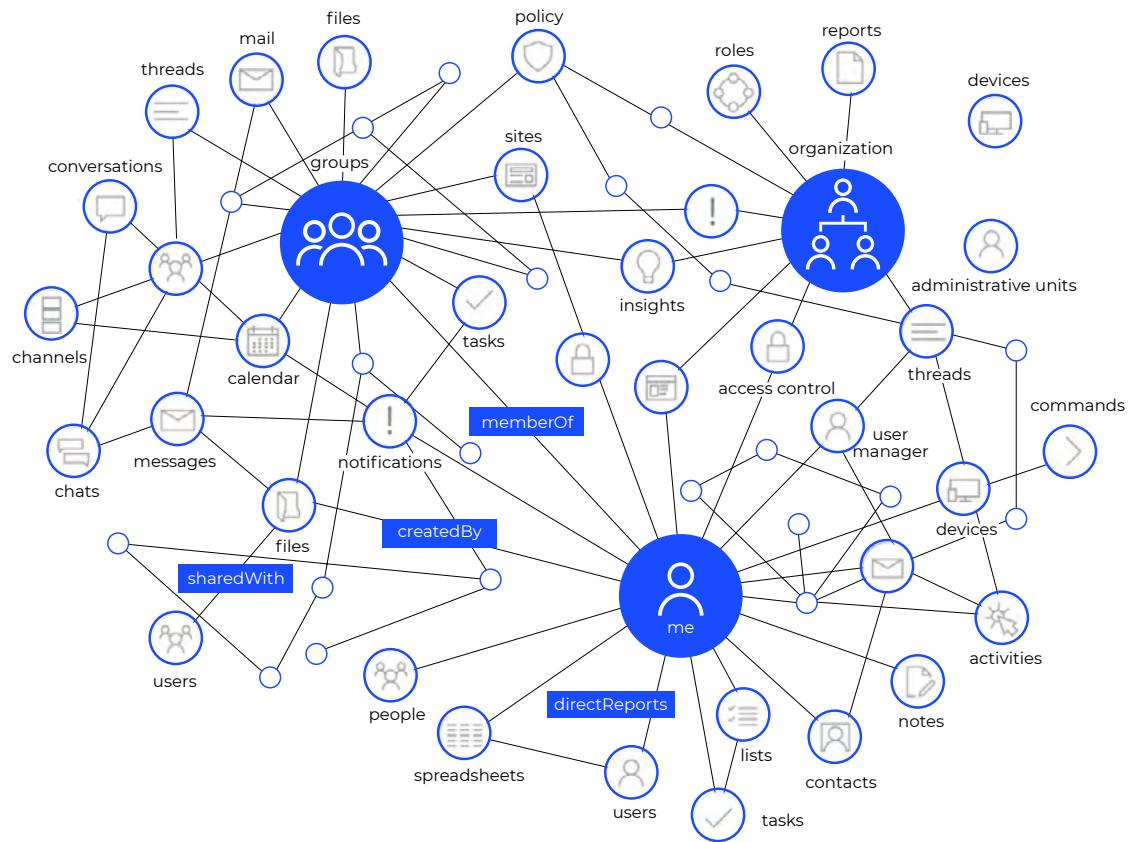


Data Is Not Used for Model Training

Chat data is not used to train any AI models.

All Your Data, Integrated and Orchestrated with Microsoft Graph

By design, Copilot uses Microsoft Graph and only generates responses based on information a user has access to.



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



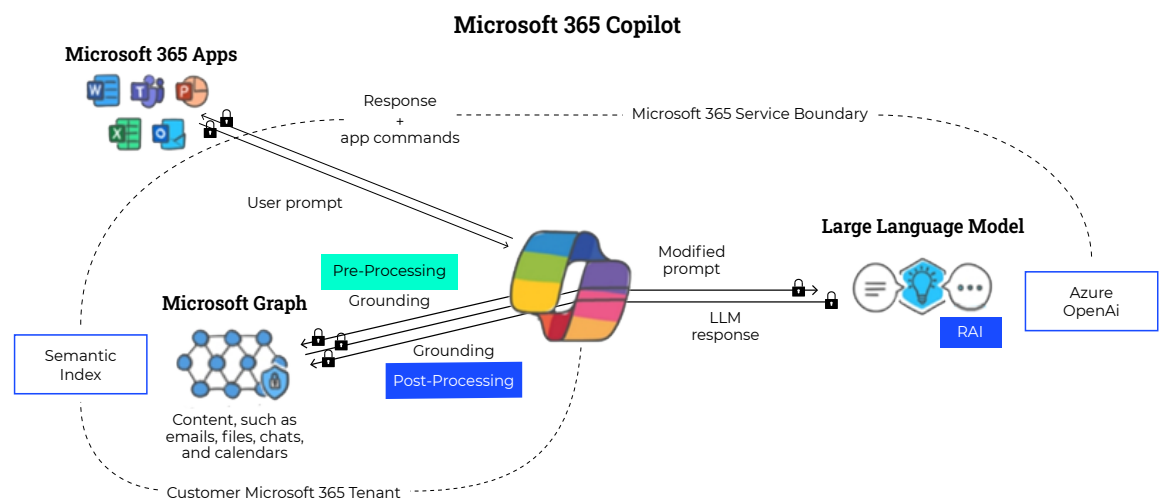
That conceptual understanding
helps Copilot better understand
your needs



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.

www.techcommunity.microsoft.com/t5/microsoft-mechanics-blog/how-to-get-ready-for-microsoft-365-copilot/ba-p/3853773

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 Teams |
| ☒ Microsoft Entra ID | ☒ The New Microsoft Loop experience |
| ☒ A Work Account in Azure Active Directory | ☒ Semantic Index for Copilot |
| ☒ Microsoft OneDrive | ☒ Microsoft Whiteboard |
| ☒ The New Outlook app | |

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.

 Microsoft | Setup All guides Guides by product Guides by category Guides by scenario Discover, try, buy

Microsoft 365 Copilot setup guide

● Overview

○ Readiness

○ Licenses

○ Email announcement

○ Finish

Set up Microsoft 365 Copilot

ⓘ You might need to sign in to the Microsoft 365 admin center at certain points during this guide to use built-in tools, and configure Microsoft 365 settings, at which point you'll have to start over and lose any entries. You can [sign in](#) now to avoid restarting this guide later.

Microsoft 365 Copilot is an AI-powered productivity tool that helps users work more efficiently. Copilot uses language models and data from apps in Microsoft 365, like Word, Excel, PowerPoint, Outlook, and Teams to help users get work done more efficiently. It assists users with tasks like writing, editing, summarizing, creating data visualizations, and managing inboxes.

Who can use Microsoft 365 Copilot?

Microsoft 365 Copilot is available for enterprise customers who meet the following requirements:

- You have a minimum of 300 Microsoft 365 E3 or E5 licenses in your organization.
- You have a minimum of 300 Microsoft 365 Copilot add-on licenses for your users.

Microsoft 365 Copilot isn't available for individual or small-business customers. Enterprise customers must contact [Microsoft 365 Sales](#) or their Microsoft representative to buy Microsoft 365 Copilot.

<https://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.



Global Gold partner

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www.us.logicalis.com/microsoft



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Highly specialized

With eleven advanced specializations across Azure, Modern Work and Security, we have the capability and skills to solve business problems on Microsoft.

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