

Microsoft Copilot Chat

User Guide

Version 1.0



COOK COUNTY
BUREAU OF

TECHNOLOGY

Copilot Chat User Guide

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Purpose

The purpose of this manual is to provide instructions on how users can effectively use Microsoft *Copilot Chat* for rapid information retrieval, research, efficient problem-solving and ideation. This manual is intended to support you as you embark on your journey using Microsoft Copilot “A secure artificial intelligence (AI) chat assistant” that is designed to generate relevant results for your work while it protects your data.

Before you begin

Important guidelines for using generative AI as a Cook County employee

Before you begin using generative AI tools for your work with Cook County, it is important to know and follow all applicable County policies and guidelines. This section highlights essential information for generative AI use in the workplace.

Privacy and Data Use

Cook County is committed to protecting the privacy and integrity of all data used in connection with generative AI. Employees and contractors must understand that AI systems – particularly those that generate content – can introduce risks such as exposing personal information, unintentionally sharing intellectual property or producing biased or misleading content.

Before any AI tool is used with sensitive data (like health records, personal identifiers or law enforcement data), it must be vetted for compliance with privacy laws such as the Health Insurance Portability and Accountability Act (HIPAA), the Family Educational Rights and Privacy Act (FERPA), the Illinois Biometric Information Privacy Act and other state and federal regulations. These safeguards are in place to prevent misuse and to ensure residents’ rights and confidentiality are fully respected.

We must also ensure that any AI-generated content does not violate copyright or intellectual property laws. If you're unsure whether data or content is appropriate for use with an AI tool, you should consult your legal team before proceeding.

Employees are expected to use only County-authorized AI tools and follow proper data handling procedures. If you're unsure whether data is appropriate for AI use, or if you observe AI outputs that seem biased, misleading or inappropriate, it's your responsibility to report it. These protections help safeguard both individual privacy and the County's digital infrastructure.

Cook County AI Guidelines and Policies

Cook County's policy on Generative AI is designed to ensure that AI technologies are used ethically, securely and responsibly across all County agencies. The goal is to harness AI's potential to improve services and efficiency while minimizing risk and upholding public trust. The policy applies to all County employees, contractors and departments, and covers both public-facing and internal AI tools.

Before any AI system is used, it must be vetted for security, transparency and compliance with legal standards. AI tools can only be used if they've been authorized and configured according to the County's procedures. Human oversight is a critical requirement—systems must either be supervised directly or reviewed regularly to ensure safe and effective operation.

Oversight is built into the policy through designated roles. Leaders like the Chief Information Officer (CIO), Information Security Officers (ISSO) and Privacy Officials are responsible for setting strategy, assessing risks, monitoring system behavior and ensuring alignment with Countywide standards. Additionally, a Generative AI Advisory Board and the Information Security Working Group (ISWG) provide centralized guidance and coordination.

Compliance with the AI Risk Management Policy is mandatory. Each agency is responsible for tracking the AI systems they use, managing risk, monitoring system performance, and retiring AI technologies securely when they are no longer in use. Additionally, any AI used by third-party vendors must meet County standards and be subject to risk review.

Lastly, Cook County is committed to a culture of continuous learning, transparency and collaboration around AI. All staff are expected to complete training, stay current with policy updates and contribute to a safe and ethical AI environment through feedback and active participation.

Offices Under the President's End User AI Guidelines

For employees of Offices Under the President (OUP), End User AI Guidelines are provided for employees who want to use an AI tool for their work. OUP employees can access these guidelines from the Policy Library or via the link below. OUP employees must read these guidelines before professionally engaging with AI tools on behalf of Cook County. If you're not an employee of OUP and logged into the County network, the link below will not open.

[OUP AI Guidelines.pdf](#)

Here are key points to remember:

- 1. Do not enter non-public data into any AI system not controlled by Cook County. This includes Copilot Chat.**
- 2. ALL AI Meeting Assistants are prohibited.**
- 3. Comply with all applicable laws and regulations.**
- 4. Review all AI generated content.**
- 5. Do not use AI to generate content that could be mistaken for real people.**
- 6. Disclose the use of AI when a significant portion of the content is generated by AI, both in drafts and in final work products. Attributions should specify how AI was used.**

What is Copilot Chat?

Microsoft Copilot Chat is a generative artificial intelligence tool included with your current Cook County Microsoft 365 account, just like Outlook, Word and SharePoint (just to name a few). Copilot Chat is a built-in chat assistant that is multi-platform accessible and can provide benefits to several key functions for users within Cook County:

Customized Responses: Users can prompt the chat to draft emails, summarize meetings and documents, and assist with creating language for various professional needs like memos, presentations and speeches.

Enhanced Productivity: Copilot Chat can aid with decision making with complex business problems and help write software code for intricate solutions by efficiently automating problem solving tasks, so users can focus on execution.

Knowledge Accessibility: Copilot Chat can research a broad range of topics directly within the Microsoft Edge browser and produce easy-to-digest content tailored to you through its rapid information retrieval capability.

This AI Chat tool is designed to assist and provide information to the best of its ability. However, it may not always be accurate or up-to-date. Users are encouraged to:

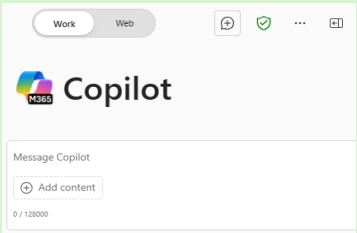
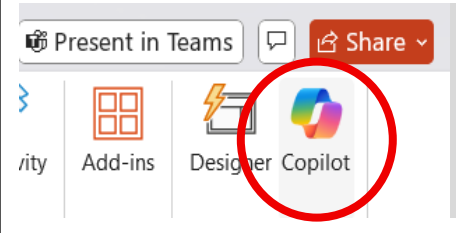
- 1. Verify Information:** Cross-check any critical information with reliable sources.
- 2. Use Judgement:** Apply personal judgement and discretion when interpreting responses.
- 3. Seek Professional Advice:** For specific issues, such as medical, legal or financial matters, consult a qualified professional.

Cook County is not responsible for any actions taken based on the information provided by the AI tool.

Throughout the remainder of this manual, you will receive information on *Getting Started with Copilot Chat* and *Best Practices* while using the chat assistant.

There are two different versions of the tool. **Copilot Chat is what is available to us and is included with your existing Microsoft license.** M365 Copilot requires an additional license at an additional cost, much like other Microsoft apps you may be familiar with e.g. Power BI, Visio, Project). Our focus is on the capabilities of *Copilot Chat*.

Please note: The additional M365 Copilot license is under review and currently unavailable for additional purchase.

Copilot Chat [Sign on Required]	M365 Copilot [License Required]
	
<p>ALL licensed users will gain access to this secure/internal Chat-only experience. It does NOT have access to your internal content – email, documents, meetings, etc.</p>	<p>There is a version of Copilot that requires purchasing an additional license and is currently unavailable.</p>

Getting Started

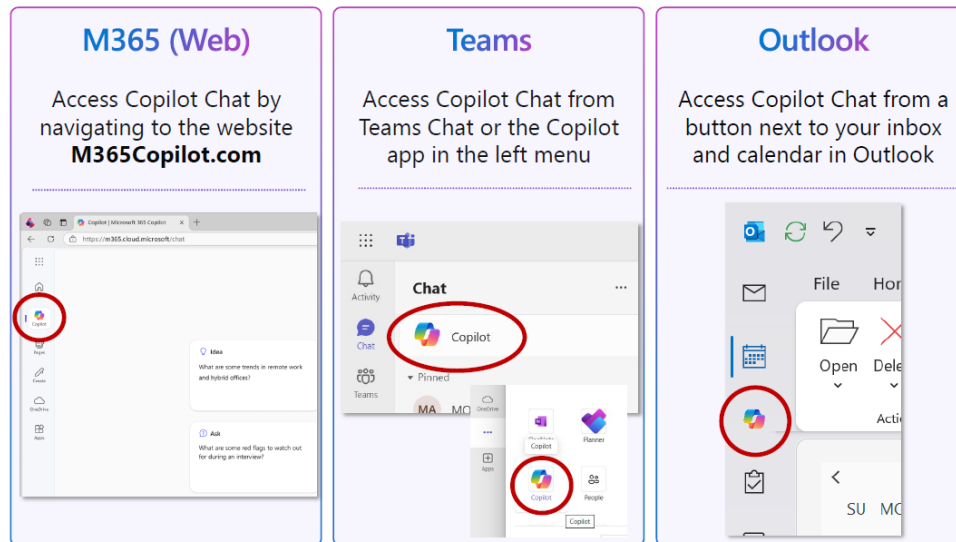
How to access Copilot Chat

As a user, you can access Copilot Chat in several places that provides the same look and feel once you enter the application:

- Microsoft 365 (Web)
- MS Teams (Web, Desktop)
- Outlook (Web, Desktop)

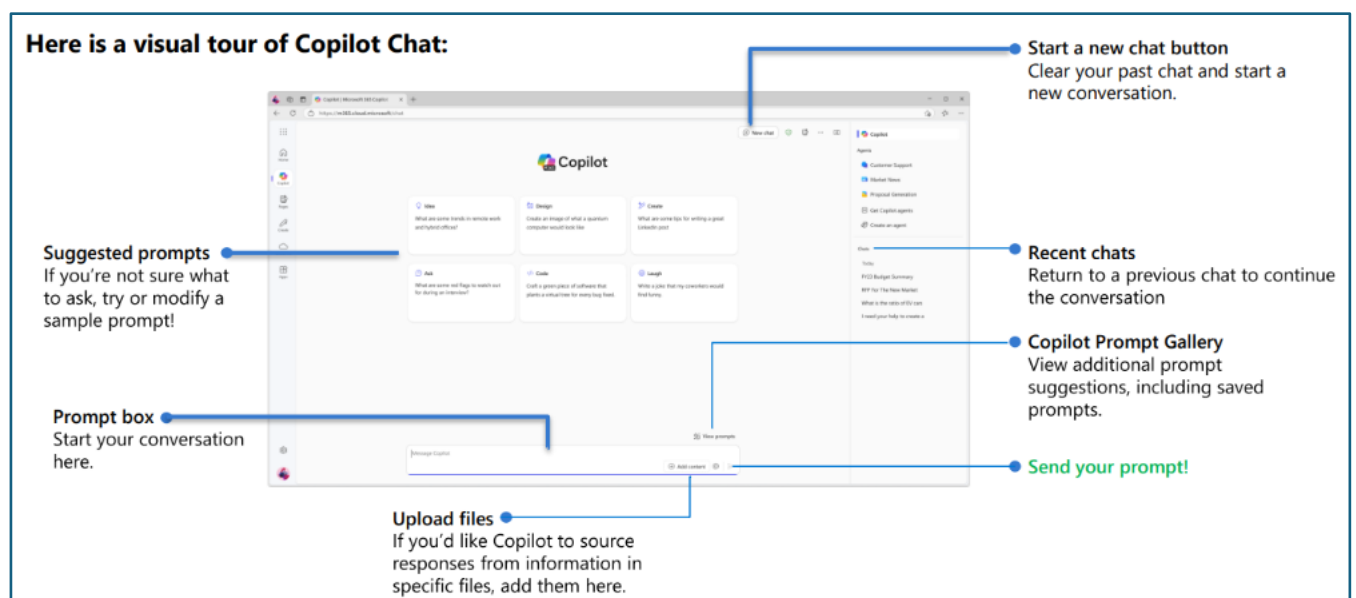
Access Points

View the chart below to see how you can access Copilot Chat through each of these different Microsoft applications: Microsoft 365 (your internet-based Microsoft hub), Teams and Outlook.



Interface Overview

When getting started with Copilot Chat, we recommend accessing it via the Web portal until you become more familiar with Copilot features: <http://www.microsoft.com/en-us/microsoft-365/copilot>. Here are some key navigation highlights.



Using Features

- **Prompt Box:** The prompt box is the main feature. Here you enter your prompts to give Copilot instructions. See the next section, *Copilot Chat Best Practices* for more details. The better the prompt, the better the results.
- **Task Suggestions:** Copilot provides suggestions based on your recent activities.
- **Settings Access:** Click on the gear icon to adjust preferences and settings.

Tips for Effective Use

- Be specific in your queries and you will get better results. Consult your AI Guidelines for limitations and restrictions.
- Explore the suggested prompts to save time.
- Explore the suggested tasks to discover new features.
- Save prompts you may use over again.



When exploring suggested prompts and tasks, remember your policies and guidelines, e.g. OUP AI Guidelines. It is your responsibility to ensure you are not violating any rules or policies when entering prompt information.

Copilot Chat Best Practices

Tips for Crafting Clear Queries: The Art of Prompting

Prompts are how you ask Copilot Chat to do something for you—like creating, summarizing, reviewing or researching. How a prompt is worded and constructed determines Copilot Chat's response.

Think about prompting like having a conversation, using **plain but clear language** and providing context like you would with an assistant.

In this section we will break down the ingredients to an effective prompt. The responses you will get from Copilot are directly related to what you ask and how it is written.

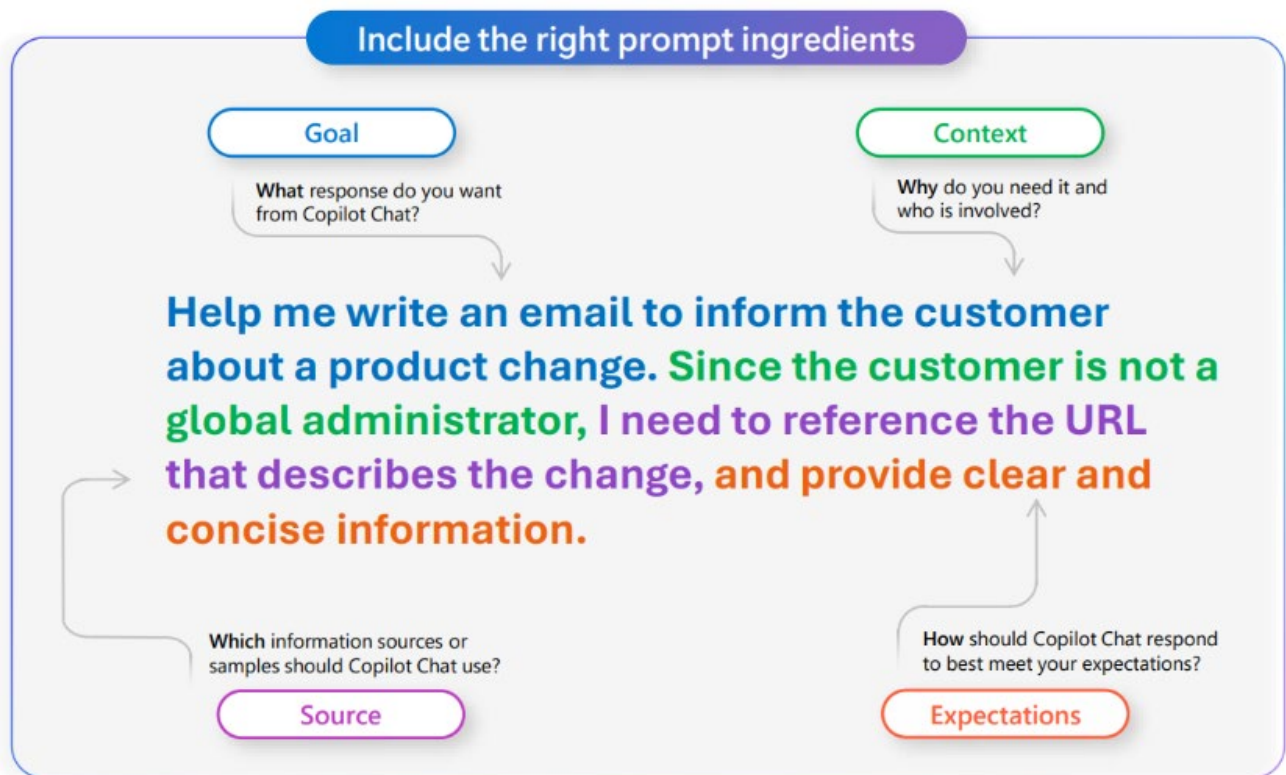
Key Elements of Prompting

To get the best response it's important to focus on some of the key elements when phrasing your Copilot Chat prompts. There are four (4) main ingredients to an effective prompt: the goal of the prompt, context related to goal, desired source details, and expectations.

The Right Prompt Ingredients

Goal	Context	Source	Expectations
What responses do you want from Copilot Chat?	Why do you need it and who does it involve?	Which information sources or samples should Copilot Chat use?	How should Copilot Chat respond to best meet your expectations?

Let's look at an example that highlights all these ingredients in a prompt.



When you are ready to try Copilot Chat, challenge yourself to create prompts using these four ingredients. Change the wording and details to see how the response may change. This will help you find your ideal style of prompt engineering.

In the next section, we will look at different prompt examples that may be helpful to you. See if you can find all four ingredients in each prompt. For a greater challenge, try to create your own prompt with the basic information provided.

Examples with the Right Prompt Ingredients

Example 1:

Goal/Intent: I need a workplace of the future image for a presentation

Context: This is for a presentation to leadership

Source/Specific Information: real photos of something similar

Expectations (if needed): Show an open floor plan with workstations arranged creatively

PROMPT: I need an image that represents the workplace of the future for a presentation I'm giving to leadership. Please use other real photos to generate a unique, realistic image. The image should show an open floor plan with workstations arranged creatively.

Example 2:

Goal/Intent: I want to write a great LinkedIn post

Context: I want to introduce a new program for Cook County

Source/Specific Information: Program Launch Summary document

Expectations (if needed): I want it to appeal to 20-25 year olds. It needs to be short.

PROMPT: Please help me create a great LinkedIn Post that my company can use to introduce our new product. Using [paste the Program Launch Summary document], create a short post that appeals to 20-25 year olds.



If you were to use this prompt at work, what are some concerns you may have about pasting the program launch document directly into the prompt? If you had to remove private and sensitive information, what could you use in place of it to complete the task without violating the Generative AI Guidelines?

Example 3:

Goal/Intent: I want to increase my AI skills

Context: I'm an Administrative Assistant and want to understand AI that's useful for me

Source/Specific Information: Free courses available on the web

Expectations (if needed): Bulleted list sorted by relevance

PROMPT: Please provide me a bulleted list of free courses that I could use to skill up on AI. I'm an Administrative Assistant and want to gain a basic understanding of AI. Please sort the list in order of relevance to my profession.



Can you rewrite this prompt to take advantage of Microsoft Learn or your Cook County LinkedIn Learning account (if applicable)?

How to Refine Responses

There are many ways you can refine your Copilot Chat to fit your needs or redirect the conversation to provide more/less information.

1. Reference Files

Enter your prompt

1

Enter your detailed prompt in the text box at the bottom. If you would like Copilot to source information from any reference files, you can upload them in your prompt by selecting the "Add content" button.

2. Check Sources

Check sources

2

Copilot Chat is transparent about the sources of its information. See these sources listed underneath the answer.

Vet these sources and validate your answers.

3. Continue the Conversation

Continue the conversation

3

You can ask follow-up questions as you would in a conversation. You can refine the answer too.

For example, try "Write a shorter answer" or "Give me more detail." You can also select suggested prompts.

Dos and Don'ts

Remember to use this tool with focus and stay professional. Here's a helpful list of what to do and what to avoid:

Don't



- Be vague
- Request inappropriate or unethical content
- Use slang, jargon, or informal language
- Give conflicting instructions
- Interrupt or change topics abruptly

Do



- Be clear and specific
- Keep it conversational
- Give examples
- Ask for feedback
- Write legibly
- Check for accuracy
- Provide details
- Validate the output provided by the chat

Appendix: Help and Support for All Users

- For visual guidance, refer to official Microsoft documentation or video tutorials available on their [website](#). Keep in mind, your Cook County account is a government tenant and may not have access to all the features listed on the Microsoft site.
- All Cook County employees should stay up to date with all policy details and regularly visit their designated policy hubs.
- If you want to enter a prompt but are not sure if it is safe, discuss it with your supervisor.
- Check your email regularly for AI related updates and news.
- If you do not see the CoPilot Chat icons as described in the documentation, please contact the Bureau of Technology Service Desk using the portal or via phone 312-603-1390 option 1.
 - A note on contacting the Service Desk for Copilot Chat support: The Service Desk can assist with **access** to Copilot Chat, but they can **NOT** help you with prompt development, modifying your prompts, or train you on how to use the tool. Please use the instructions provided in this manual and the resources listed above.
 - Before calling, please ensure you have done the following:
 1. Turned off or restarted your computer in the last 24 hours
 2. Logged off Microsoft 365 and logged back in

Appendix 2: Help and Support for Offices Under the President Only

Below is a list of resources specifically for OUP employees, in addition to the resources listed above.

- OUP employees should visit the [Policy Library](#) regularly to ensure they are aware of the most up to date policies, including AI.

- OUP employees should save a copy of the [OUP End User AI Guidelines](#) from the Policy Library. Non-OUP employees should contact their IT support for equivalent guidelines.
- OUP employees can explore LinkedIn Learning courses offered by Microsoft. Many have pathways to certification.