



# Microsoft Copilot for Education: Comprehensive Guide

Microsoft Copilot is a family of AI tools built into Microsoft 365.

For educators and administrators, it can draft lesson plans, summarize documents, analyze data, generate presentations, respond to emails and even help build custom AI agents.

When you sign in with your school-issued Microsoft 365 account, Copilot activates **enterprise data protection**—prompts and responses stay within your Microsoft 365 tenant and are *never used to train the underlying models* <sup>1</sup> <sup>2</sup> .

Copilot honors your existing permissions and security policies, encrypts data in transit and at rest and complies with regulations such as GDPR, ISO 27001 and HIPAA <sup>3</sup> .

This guide explains how to get started (beginner), expand usage (intermediate) and build customized AI solutions (advanced) within the limits of standard educational accounts.

## Understanding Copilot and Copilot Chat

**Copilot Chat** is a web-based chat experience powered by the latest large-language models. It delivers secure AI chat at **no additional cost** when you sign in with your school or work account <sup>1</sup> . Copilot Chat works with web data only (unless you attach your own files), and prompts/responses aren't used to train models <sup>4</sup> <sup>5</sup> .

**Microsoft 365 Copilot** builds on Copilot Chat by grounding responses in your Microsoft 365 data—documents, emails, meetings and chats—and integrates directly into apps like Word, Excel, PowerPoint, Outlook, Teams and OneNote <sup>6</sup> . Institutions can purchase an academic offering (available December 2025) for \ \$18 per user per month, which adds powerful agents (e.g., **Researcher** and **Analyst**), tuning capabilities and a Copilot Control System for data governance <sup>7</sup> .

Students ages 13 and older can use Copilot Chat when the institution enables it <sup>8</sup> .

Below are three stand-alone documents tailored for different experience levels. Each document begins with an overview, provides step-by-step instructions, and includes example prompts.

# Beginner Document – Getting Started With Copilot



## 1. Accessing Copilot

1. **Sign in with your SSD (school) account.** When you log into Copilot Chat or Microsoft 365 apps with your institutional account, enterprise data protection automatically applies. Prompts and responses aren't used to train the underlying models, and chat data are encrypted during the session <sup>9</sup> . Avoid signing in with a personal account for confidential content.
2. **Open Copilot Chat.** Visit [copilot.microsoft.com](https://copilot.microsoft.com) or select **Copilot Chat** from the app launcher. Copilot Chat provides a simple text box. You can paste content, upload a file or type a question.
3. **Enable Copilot inside apps.** In Word, Excel, PowerPoint or Outlook, look for the Copilot button (often in the ribbon or toolbar). Click to open a side pane where you can ask Copilot to draft, summarize or analyze content.

## 2. Essential Features

Copilot makes routine tasks faster:

- **Draft and refine documents (Word)** – Ask Copilot to write a lesson plan, revise language or adjust tone.
- **Create engaging presentations (PowerPoint)** – Provide a topic and supporting text; Copilot will suggest slide layouts and imagery.
- **Analyze and visualize data (Excel)** – Quickly identify patterns, create charts and summarize student performance without writing complex formulas <sup>10</sup> .
- **Summarize emails and meetings (Outlook/Teams)** – Select “Summarize” to get a concise overview of long email threads or meeting transcripts <sup>11</sup> .
- **Organize information (Teams)** – Capture key points, assign action items and prepare collaborative meeting notes <sup>12</sup> .

### 3. Sample Prompts

Use natural language; Copilot will infer intent. Here are beginner-friendly prompts:

App	Sample prompt (copy or adapt)
<b>Word</b>	"Draft a one-page lesson plan on photosynthesis for 7th grade including a hands-on activity and assessment."
<b>PowerPoint</b>	"Create a 5-slide presentation about our school's new reading program with pictures and speaker notes."
<b>Excel</b>	"Analyze this attendance spreadsheet and tell me any patterns I should know about."
<b>Outlook</b>	"Summarize this email thread and highlight any decisions I need to make."
<b>Teams</b>	"Summarize our last faculty meeting, list decisions and actions assigned to each team member."

### 4. Best Practices & Limitations

- **Stay within your permissions.** Copilot can only access data you already have permission to see <sup>13</sup> . If a document is private, Copilot won't reveal it.
- **Keep prompts clear and specific.** Provide context (grade level, subject, length) to get better results.
- **Review output critically.** AI might misinterpret or produce inaccurate information. Always verify before sharing with students or colleagues.
- **Protect student privacy.** Even though prompts and responses aren't used for model training <sup>14</sup> , avoid including personally identifiable information (PII) in prompts.
- **Understand free versus paid.** Copilot Chat is free; Microsoft 365 Copilot (for deeper integration) requires an additional license starting December 2025 <sup>7</sup> .

## Intermediate Document – Enhancing Teaching & Administration



### 1. Use Teach to Streamline Lesson Creation

**Teach** is a new Copilot feature that helps educators create and adapt lesson materials. It can generate lesson plans, quizzes and rubrics and customize them by language, reading level, length and alignment to standards <sup>15</sup>. To use it:

1. Open the **Microsoft 365 Copilot** app (web or integrated into Teams).
2. Select the **Teach** tab.
3. Enter your topic (e.g., “fractions for 5th grade”); choose parameters such as grade level, learning objectives or required standards.
4. Review and adjust the generated plan or quiz. The interface lets you change difficulty, reading level and length without re-prompting.
5. Export the content to Word, OneNote or assign directly in Teams.

### 2. Explore Study and Learn for Students

The **Study and Learn** agent offers adaptive activities like flashcards, matching and quizzes, grounded in learning science. Students can choose to practice, study specific topics or chat with the agent; it supports critical thinking and self-reflection <sup>16</sup>. Institutions can preview this agent at no extra cost (available widely after November 2025). Teachers can monitor progress and adjust assignments accordingly.

### 3. Integrate Copilot with Learning Management Systems (LMS)

Copilot Chat is now available in apps like Outlook and PowerPoint and will integrate with LMS platforms such as **Canvas, Schoology, Brightspace, Blackboard and Moodle** through the Microsoft 365 LTI connector <sup>17</sup>. This means educators can draft communications, assignments or lesson plans directly within the LMS while maintaining enterprise data protection.

## 4. Use Agents for Personalized Workflows

Pre-built and custom agents can extend Copilot’s functionality. Examples include **Researcher** and **Analyst** agents (included with the academic offering) that perform deep research and data analysis. You can create your own agents to automate tasks like generating interactive quizzes, summarizing student records or drafting newsletters <sup>18</sup>. In the Microsoft 365 Copilot app, choose **Agents**, select a template (or start from scratch) and configure the agent’s capabilities and data access.

## 5. Example Prompts for Intermediate Users

Scenario	Example prompt
<b>Data-driven decisions</b>	“Analyze this semester’s assessment results and suggest three focus areas to improve reading comprehension” <sup>19</sup> .
<b>Streamlining communication</b>	“Draft an executive summary of these policy documents and highlight the changes that affect teachers” <sup>20</sup> .
<b>Presentation creation</b>	“Turn the insights from this Word document into a 10-slide presentation for the board meeting” <sup>21</sup> .
<b>Lesson planning</b>	“Transform my lecture notes on algebraic equations into an interactive lesson with think-pair-share activities and real-world problems” <sup>22</sup> .
<b>Assessments &amp; feedback</b>	“Create a rubric for assessing a persuasive essay, with criteria for argument structure, evidence and mechanics” <sup>23</sup> .

## 6. Privacy and Security Considerations

Intermediate users often upload files or share links. Remember that enterprise data protection extends to file uploads and attachments. Copilot Chat stores uploaded files in your OneDrive for Business and only accesses data you can view <sup>5</sup>. Web search queries used for grounding are anonymized and exclude user or tenant identifiers <sup>24</sup>.

# Advanced Document – Building Custom Solutions and Managing Copilot



## 1. Invest in Microsoft 365 Copilot

While Copilot Chat is free, the **Microsoft 365 Copilot** license (academic offering starting December 2025) unlocks deeper capabilities:

- **Agents such as Researcher and Analyst** for comprehensive research and data analysis <sup>7</sup> .
- **Copilot Tuning** to customize how the AI responds to your organization's tone and needs <sup>7</sup> .
- **Copilot Control System** with dashboards to monitor adoption, enforce policies and manage agent access <sup>7</sup> .

This subscription costs about \$18 per user per month for educators, staff and students aged 13 + <sup>25</sup> . Evaluate licensing requirements (e.g., A3/A5 licenses) before purchase.

## 2. Build and Manage Custom Agents

Educators and administrators can design custom AI agents to automate specialized tasks. Use **Copilot Studio's Agent Builder** (available with the paid plan) to:

1. **Define the agent's purpose and audience.** For example, an agent could generate interactive quizzes for a math course or provide on-demand student handbook answers.
2. **Connect data sources.** Choose whether the agent can access documents from SharePoint, Excel spreadsheets, or third-party connectors.
3. **Enable capabilities.** Toggle features like natural language to code (former Code Interpreter), document creation or chart generation <sup>26</sup> . You can also decide whether the agent can perform autonomous actions (e.g., update spreadsheets or send drafts).

4. **Test and iterate.** Chat with your agent in the Copilot interface, adjust instructions and refine its behavior.
5. **Deploy and monitor.** Use the Copilot dashboard to track adoption and gather feedback. Administrators can audit interactions using built-in logs and enforce retention policies <sup>13</sup>.

### 3. Advanced Techniques and Features

- **Work IQ & Personalization.** Copilot can remember previous chats and preferences to offer more contextual responses. Users can manage memories and custom instructions in the Copilot app settings <sup>27</sup>.
- **Declarative agents & multimodal analysis.** New declarative agents interpret content inside Word, PowerPoint and PDF files, extracting insights from charts or diagrams <sup>28</sup>.
- **Agent autonomy.** Enable autonomous actions to let agents perform tasks (like updating lists or sending reports) after verification. Always review actions before final execution.
- **Security & compliance.** Enterprise data protection includes encryption, tenant isolation, sensitivity labels, retention policies and audit logs <sup>29</sup>. It safeguards against harmful content and prompt injections <sup>30</sup>. Administrators can use **Microsoft Purview** to manage compliance and **Copilot Dashboard** for usage reports. <sup>13</sup>

### 4. Strategies for Administrators

1. **Set up policies.** Work with your IT team to define who can access Copilot, what data sources are available, and how long interactions are retained. Copilot inherits your organization's identity and permission model <sup>13</sup>.
2. **Provide training and guidelines.** Offer workshops on writing effective prompts, verifying AI output and protecting student privacy. Ensure staff understand the difference between free Copilot Chat and the licensed Microsoft 365 Copilot.
3. **Monitor adoption.** Use the Copilot dashboard to measure usage, satisfaction and time savings. Feedback from early adopters (like Brisbane Catholic Education) indicates educators saved over nine hours per week on planning and administrative tasks <sup>31</sup>.
4. **Encourage innovation.** Support teachers who build custom agents or use advanced features. Encourage sharing of prompts and workflows to spread best practices across the district.

## Conclusion

Microsoft Copilot empowers educators and administrators to reclaim time, personalize learning and make data-driven decisions. Whether you're just getting started or ready to build custom agents, remember that enterprise data protection and responsible AI practices are built in. By integrating Copilot thoughtfully into daily workflows and teaching strategies, schools can streamline operations and focus on what matters most—supporting student success.

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<sup>1</sup> Learn about Copilot in Education | Microsoft Education

<https://www.microsoft.com/en-us/education/products/copilot-in-education>

<sup>2</sup> <sup>9</sup> Using Microsoft 365 Copilot Chat for work or school - Microsoft Support

<https://support.microsoft.com/en-us/topic/using-microsoft-365-copilot-chat-for-work-or-school-1e7de2a4-5ca8-4e93-a6e6-1965def6a0fe>

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