ALDRIDGE

MICROSOFT COPILOT DEMO

AI for Word, Excel, & PowerPoint

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VIRTUAL
training co

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What is Copilot in Microsoft 365

Microsoft Copilot for Microsoft 365 is an **AI-powered productivity tool** that coordinates **large language models** (LLMs), content in Microsoft Graph, and the Microsoft 365 apps that you use every day, such as Word, Excel, PowerPoint, Outlook, Teams, and others. This integration provides real-time intelligent assistance, enabling users to enhance their creativity, productivity, and skills.

Copilot for Microsoft 365 leverages LLMs, AI algorithms that apply deep learning and extensive data to comprehend, distill, predict, and create content. Among these LLMs are pre-trained models like GPT-4, which are tailored to perform well in such functions.

Microsoft 365 apps (such as Word, Excel, PowerPoint, Outlook, Teams, loop, and more) operate with Copilot to support users in the context of their work. Some of these features are detailed in the following table:

Microsoft 365 App	Feature	Description
Word	Draft with Copilot	Generate text with and without formatting in new or existing documents. Word files can also be used for grounding data
	Chat	Create content, summarize, ask questions about your document, and do light commanding via Chat.
PowerPoint	Draft with Copilot	Create a new presentation from a prompt or Word file, leveraging enterprise templates. PowerPoint files can also be used for grounding data
	Chat	Summary and Q&A
	Light commanding	Add slides, pictures, or make deck-wide formatting changes.
Loop	Collaborative content creation	Create content that can be collaboratively improved through direct editing or refinement by Copilot.
Outlook	Coaching tips	Get coaching tips and suggestions on clarity, sentiment, and tone, along with an overall message assessment and suggestions for improvement.
	Summarize	Summarize an email thread to help the user quickly understand the discussion.
	Draft with Copilot	Pull from other emails or content across Microsoft 365 that the user already has access to.
Teams	Chat	Users can invoke Copilot in any chat. Copilot can summarize up to 30 days of the chat content prior to the last message in a given chat. Copilot uses only the single chat thread as source content for responses and can't reference other chats or data types (for example, meeting transcripts, emails, and files). Users can interact with Copilot by selecting pre-written prompts or writing their own questions. Responses include clickable citations that direct users to the relevant source content that was used. Conversations with Copilot take place in a side panel that allows users to copy and paste. Copilot conversations will disappear after the side panel is closed.
	Meetings	Users can invoke Copilot in meetings or calls within the same tenant. Copilot will use the transcript in real-time to answer questions from the user. It only uses the transcript and knows the name of the user typing the question. The user can type any question or use pre-determined prompts; however, Copilot will only answer questions related to the meeting conversation from the transcript. The user can copy/paste an answer and access Copilot after the meeting ends on the Recap page.
	Copilot	Allows users to access data across their Microsoft 365 Graph and leverage LLM functionality. Copilot can be accessed in Teams and when signed-in to Bing with an active directory account.

| Microsoft 365 App	Feature	Description
	Calls	Copilot in Teams Phone uses the power of AI to empower you to work more flexibly and intelligently, automating important administrative tasks of a call, such as capturing key points, task owners, and next steps, so you can stay focused on the discussion. Copilot in Teams Phone supports both voice over Internet Protocol (VoIP) and public switched telephone network (PSTN) calls.
	Whiteboard	Makes meetings and brainstorm sessions more creative and effective. Use natural language to ask Copilot to generate ideas, organize ideas into themes, create designs that bring ideas to life and summarize whiteboard content.
OneNote	Draft with Copilot	Use prompts to draft plans, generate ideas, create lists, and organize information to help you easily find what you need.
Forms	Draft with Copilot	Use prompts to draft questions and suggestions that help you create surveys, polls, and other forms with ease.

The Copilot App

Copilot can synthesize data from multiple sources to give you a summary of things you need to catch up on, including your files, messages, meetings, emails, and people. It can also help you find and use info that's buried in documents or lost in conversations. And with Copilot by your side, you can create content with it all.

Ask a work-related question, or try one of these:

- Draft a message with action items from my last meeting.
- Catch up on my unread emails.
- How do I write a request for proposal?

Access Copilot 365

1. Log into your Microsoft Account online.
2. Click on the Copilot icon from the menu bar on the left.
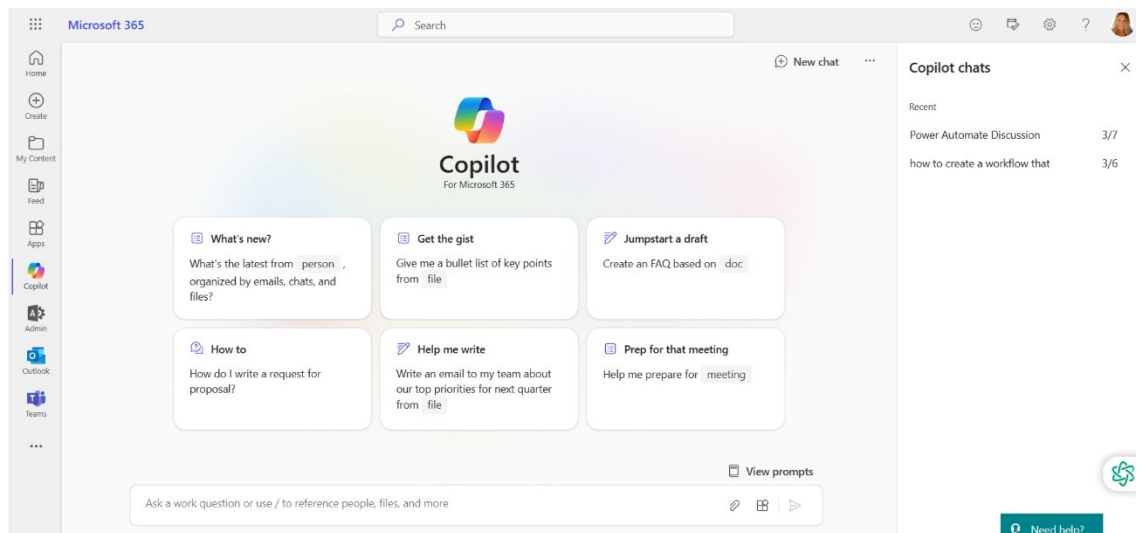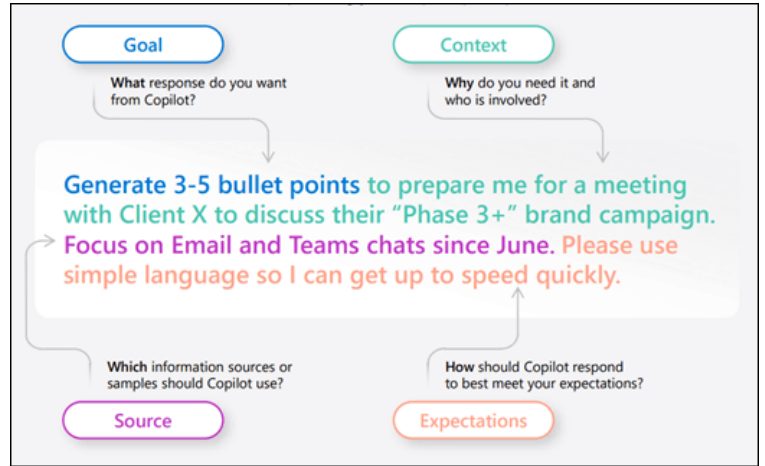
Prompts in Copilot

Prompts are requests made to Copilot for Microsoft 365 for actions such as creation, summarization, editing, or transformation. Imagine prompting as conversing, using simple and clear language and giving context as you would with a helper.

Include the right prompt ingredients.

To get the best response, it's important to focus on some of the key elements below when phrasing your Copilot prompts.

Keep the conversation going.

Following up on your prompts help you collaborate with Copilot to gain more useful, tailored responses.


Generating content ideas	Gaining insights
Lead with broader requests, then give specific details about the content.	Ask for a summary of a specific file, then ask relevant questions to gain deeper insights.
Enabling insightful meetings	**Translating languages**
Request a meeting recap, then ask for more information about what you should know.	Ask Copilot to translate a sentence to one of the supported languages, then ask for more context or a regional dialect.
Storytelling assistance	**Solving technical problems**
Ask Copilot to write a story, then guide it by giving more specific, relevant details.	Present a technical problem, then narrow it down, or ask for step-by-step guidance.

Talk to Copilot

Use the microphone icon at the bottom right corner of the Copilot window. This will allow you to talk directly to the system to enter the prompts instead of typing.

Ask a question or make a request about data in a table

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The microphone is now available in all apps.
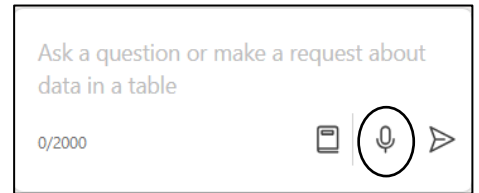
Copilot Icon is Greyed Out

The button in Excel is greyed out means you are using a local file; the copilot feature only works with files stored in OneDrive for Business/SharePoint while using Excel.

Images in Microsoft Copilot

What is a prompt? - An AI image prompt is the text input that you provide to Copilot to generate an image. It can be as simple as a phrase, or as complex as a sentence or paragraph. A prompt with at least six words will yield the best possible results. Your prompt can also include additional information such as stylistic keywords.

How you structure and format your prompt can have a significant impact on the quality and diversity of the images you get.

Be specific - When writing an AI art prompt, be sure to use precise language and a minimum of six keywords to describe the results you want. Avoid vague or ambiguous terms that could lead to multiple interpretations. For example, you could simply ask Copilot to make an image of a "dog on a spaceship." However, if you want something more detailed, try this:

Don't forget to use as many ingredients as you can to get a better result. Be sure to provide:

- A clear action (make, create, paint, illustrate, draw, generate)
- A detailed subject
- A specific style
- A scene or setting
- A list of additional elements

Simple Starter Prompts

- Create an image of...
- Generate a vast landscape of...
- Create a lifelike portrait of...
- Generate a comic book scene with...
- Draw an abstract piece of art of...
- Generate an artwork of...
- Illustrate a (subject or scene) with...

- Envision a futuristic design of...
- Craft a vibrant panorama where...
- Create a painting of...
- Create an imaginative scene of...
- Conceptualize a cutting-edge design of...
- Generate an eco-conscious image of...
- Show me an up-close image of...

I personally use Add an image of as my starting prompt in PowerPoint.

Each application may prompt you for a specific way to add the image. Like Word may say "If you need an actual image inserted into your document, you would need to use the "Insert" function in Word, select "Pictures," and then choose the image you want to insert from your computer or online sources."

Copilot in Excel

Copilot in Excel helps you do more with your data. Starting with a table with data, you can tell Copilot what you want to know using natural language. It can help show correlations, suggest new formulas based on your questions, and generate insights that help you explore your data. Format and organize your data, create visualizations, or ask for general formula column suggestions based on your data.

Copilot in Excel works for Excel tables of up to two million cells. Some skills like formula column suggestions, highlight, sort, and filter do not have a limit on the amount of data you can interact with. However, it can take a long time, even 30 seconds or more, to get a response from Copilot when interacting with large tables.
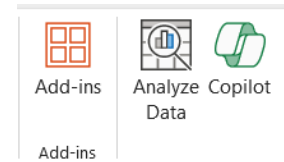
What Copilot in Excel Can Do

Copilot in Excel is a powerful tool that can help you visualize, analyze and transform data in your spreadsheets in many ways. Here's what it can do for you:

- **Data analysis**. Copilot looks at your tables and brings important information into focus. You can then dig deeper by questioning Copilot.
- **Modeling**. When working on financial modeling, you can explore different scenarios by asking "what-if" questions and providing prompts such as "model how a change to X would affect Y"
- **Visualizations**. AI helps you create charts and graphs to visualize your data in a clear and understandable way.
- **Writing formulas.** Copilot assists in writing formulas for your calculations, making complex formula creation easier and more accessible.
- **Organizing and cleaning data**. Copilot can quickly clean up messy data for you. It can remove extra spaces, merge values from different columns, highlight duplicates, sort, filter, and more.
- **Suggestions**. Get intelligent recommendations for formulas, functions, and actions based on your context.
- **Insights**. Uncover interesting insights within your data, like trends, outliers, or correlations between different parts.
- **Automating tasks**. Copilot can even write VBA code to help you automate common tasks. This is like creating kind of shortcuts for things you do often.

Copilot in Excel is a handy helper that makes your work easier and helps you get more done without all the hard work.

Select **Copilot** on the ribbon to open the chat pane. Enter your prompts and start working with Copilot.

Excel Tables

Microsoft Copilot in Excel helps you do more with your data in Excel tables by generating formula column suggestions, showing insights in charts and PivotTables, and highlighting interesting portions of data.

You'll need to have a table that includes data in a worksheet before using Copilot in Excel. Quickly turn a range of cells into a table by following these steps:

A table can include the following elements:

Header row - By default, a table has a header row. Every table column has filtering enabled in the header row so that you can filter or sort your table data quickly. Related data easier, you can turn a range of cells into an Excel table.

Calculated columns - By entering a formula in one cell in a table column, you can create a calculated column in which that formula is instantly applied to all other cells in that table column.

Banded rows - Alternate shading or banding in rows helps to better distinguish the data.

Total row - Once you add a total row to a table, Excel gives you an AutoSum drop-down list to select from functions such as SUM, AVERAGE, and so on. When you select one of these options, the table will automatically convert them to a SUBTOTAL function, which will ignore rows that have been hidden with a filter by default. If you want to include hidden rows in your calculations, you can change the SUBTOTAL function arguments.

Create a Table in Excel:

1. Select a cell within your data.
2. Select Home and choose ⬜ Format as Table under Styles.
3. Choose a style for your table.
4. In the Create Table dialog box, confirm or set your cell range.
5. Mark if your table has headers and select OK.
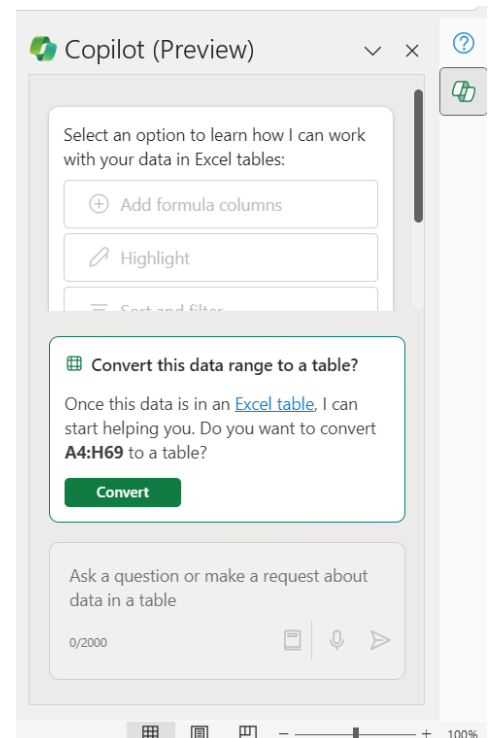
Analyzing Data with Copilot

Once the Excel data is in a table, you will be ready to use Copilot.

Format Data with Copilot

With Copilot for Microsoft 365, it's easy to highlight, sort, and filter your tables (or data in another supported format) to quickly call attention to what matters to you.

With a single table, you can effortlessly:

- Sort and filter your data.
- Apply simple conditional formatting.

Tell Copilot how you'd like to manipulate the table to better view portions of your data. You can type in your own words or use the suggested prompts.

To highlight your data, try this:

- Bold the top 10 values in the Sales column.
- Highlight the highest values in Units Sold.

To sort your data, try this:

- Sort engagement rate from smallest to largest.

To filter your data, try this:

- Filter to items that are due next week.

Create Formulas with Copilot

Formula columns in Copilot for Microsoft 365 allow you to create new columns in your table that perform calculations based on existing data. For example, you might use a formula column to calculate the total cost per product, or to calculate the profit for each marketing campaign. With formula columns, you don't need to manually enter calculations for each row in your table.

You can have Copilot suggest formulas after analyzing your data set or you can have it insert a new column based on the information you provide.

Show a suggestion for a formula column

With your data in a table, open the Copilot pane.

I can quickly add new columns with formulas. Select a suggested prompt, or describe what columns you'd like to add.

AI-generated content may be incorrect

Choose Show a suggestion for a formula column or Add new column....

Type in your prompt or use the microphone to talk with Copilot.

Examples:

- Calculate total cost per product in a new column.
- Add a column that calculates the total profit for each marketing campaign in 2022.

- Add a column that calculates the number of days after the product launch event.
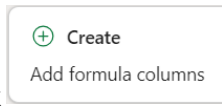
1. Click [Create / Add formula columns].
2. In the prompt area at the bottom, type in what you want Copilot to do.

in the years of service column create a formula to calculate how many years of service from the start data to date left. If date left is empty enter still employed.

Create a Chart with Copilot or PivotTable
Copilot in Excel can create a chart, PivotTable and more.

1. When you are in a table of the Excel data, you can prompt Copilot with things like:
2. Create a PivotTable based on the Department and Salary.

Next, we can choose to place the chart on a new sheet. It's important to mention that Copilot typically adds elements into Excel as a PivotTable and PivotChart by default, even if aggregation isn't required for the task at hand. As a result, it's crucial to be familiar with using these functions in Excel.

Copilot may offer a concise plot summary to support understanding, or it can serve as an initial reference for discussion with peers to enhance their comprehension.

We can deepen our analysis by examining different data compilations.

```
=IF(ISBLANK([@[Date
Left]]),"Still
Employed",DATEDIF([@[Start
Date]],[@[Date Left]],"y"))
```
Show explanation ∨

	L
3	Years of Service2
4	35
5	7
6	Still Employed
7	Still Employed
...	...

+ Insert column

AI-generated content may be incorrect

✎ Edit
Highlight

≡ Edit
Sort and filter

💡 Understand
Analyze

Show data insights

Show a suggestion for a formula column

How can I highlight, filter, and sort data? ⟳

Ask a question or make a request about data in a table

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Copilot in Word

Copilot in Word ushers in a new era of writing, leveraging the power of AI. It can help you go from a blank page to a finished document in a fraction of the time it would take to compose text on your own. Here are some key features of **Copilot in Word**:

1. **Draft with Copilot**:
   - When creating a new document or adding a new line in an existing one, the **Draft with Copilot** experience appears.
   - You can provide a simple sentence or a more complex request as a prompt for Copilot. For example, you could say, "Write an essay about baseball" or "Create a paragraph about time management."
   - If you have a **Copilot for Microsoft 365** license, you can reference up to three existing files to ground the content Copilot drafts.
   - Copilot will generate new content based on your prompt, and you can choose to keep it, discard it, or ask Copilot to regenerate a different version.
   - Use the **Inspire Me** button to have Copilot continue writing based on the existing content in your document.
2. **Transform with Copilot**:
   - Sometimes rewriting and editing existing content takes more time than writing from scratch.
   - Copilot helps you transform your existing content into a polished document.
   - Fine-tune Copilot's response by providing instructions like "Make this more concise."
3. **Chat with Copilot**:
   - Copilot Chat can provide helpful actions based on your document content or obtain additional content from outside resources.
   - Ask Copilot Chat questions to research, ideate, or iterate on possible content to add.
4. **Summarize with Copilot**:
   - If you have a lengthy document to review, let Copilot help you distill it down to key points.
   - Open an existing document, select Copilot from the ribbon, and enter "summarize this document" in the Copilot compose box.

Remember that while Copilot may write exactly what you need, sometimes it can be "usefully wrong," providing helpful inspiration.

Microsoft Copilot for 365

Open the Copilot Pane

Click the Copilot icon on the Ribbon to open the pane on the right side of the window.

Use the suggested things you can try or use the Prompt below to ask questions about the document.

This helpful feature provides answers to questions—broad or specific—about your document. You can even iterate and refine with back-and-forth discussions, get a summary or specific information about the document content, or ask it to generate ideas, tables, or lists that you can copy and insert into your document.

When generating summaries or asking questions about your document, Copilot will provide references with citations to where it retrieved its information from.

Use Copilot to Answer Questions about the Document

In the "**Ask me anything about this document**" box, you can type in a question or statement about the document and copilot will respond.
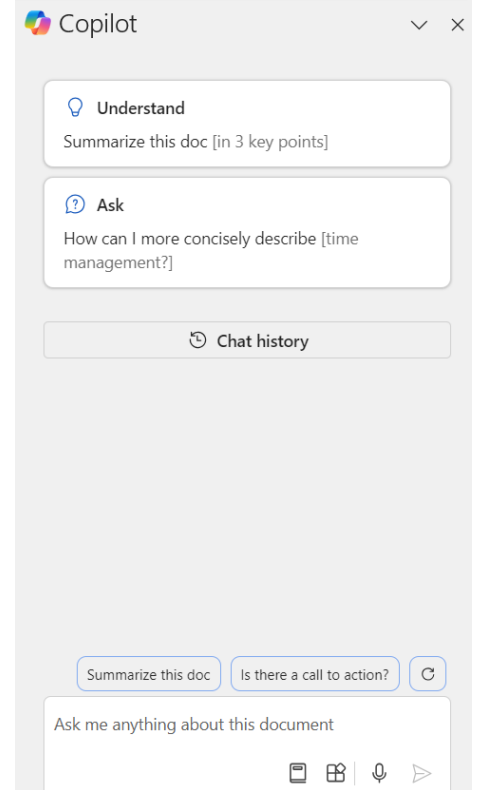
Using Copilot in a New Document

When you open a new document in Word, you will see the Copilot icon and Select the icon or press ALT+ I to draft with Copilot.
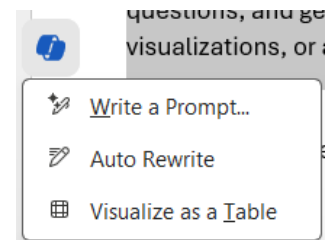
As you continue to type in your document, Copilot will be there to assist you with the icon to the left of your current

location.

Using Copilot in Existing Documents

1. Select Text
2. Click on the Copilot icon and choose Write a Prompt, Auto Rewrite, or Visualize as a Table.

## Summarize your Document with Copilot

Rewrite with Copilot

Sometimes rewriting and editing your documents takes more time and thought than writing your ideas down in the first place. Copilot not only helps you create new content, but it also helps you transform your existing content into a document you can be proud of.

1. Open Word and an existing document.
2. Select the text you want to rewrite.

3. Click the Copilot button on the page and choose the "Rewrite with Copilot" option.
4. Click the back-and-forth buttons to navigate between the different draft suggestions.
5. Click the Replace button to insert the new text.
6. (Optional) Click the "Insert below" button to keep the original and newly generated content.
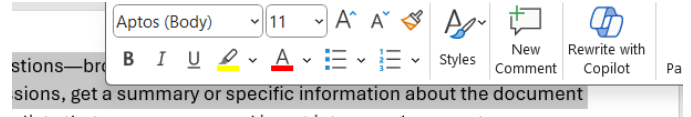
Also select the text and use the mini toolbar for Rewrite with Copilot.

Using Tables with Copilot in Word

With Copilot you can transform your selected data into a Table.

1. Select the text you want Copilot to turn into a table.
2. In the left margin next to your text, select the **Copilot** icon.
3. From the left margin Copilot menu, select **Visualize as a table**.
4. Copilot will show you what the table will look like.
5. Select **Keep it** to insert the table into your document, **Regenerate** to regenerate Copilot's generated table, or **Discard** to remove the table.
6. To fine tune the table, enter details into the Copilot compose box to state what to change about the table, like "*Add an empty third column*."
    a. Changing a table's formatting isn't supported using the compose box, but the table's formatting can be changed by using the table options in the
    b. Word ribbon.

Adjust Tone

While using Copilot rewrite, you can access the Adjust Tone option. It uses a Neutral tone by default, but you can change it be Professional, Casual, Imaginative or Concise.

1. Select the text.
2. Click the Copilot icon .
3. Click the Adjust Tone icon.
4. Choose from the drop down menu of options. Then regenerate.
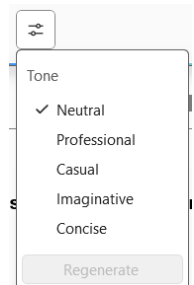
Compare multiple contracts, proposals, or documents

You can now have Copilot compare two referenced documents and show the difference between them.

Ask Copilot, "Compare /[file1] and /[file2] and list the differences between them."

Copilot in PowerPoint

Copilot in PowerPoint will build a draft presentation based on your Word document, complete with images and speaker notes.

- Give Copilot a topic and have it create you a draft presentation.
- Copilot can summarize the key points of a presentation.

Create a Presentation from a File

Copilot in PowerPoint will build a draft presentation based on your Word document, complete with images and speaker notes.

1. Create a new presentation in PowerPoint.
2. Select the Copilot button in the Home tab of the ribbon.
3. Click or type Create a presentation from file...
4. Choose the file you want to base the presentation on.

Edit the presentation to suit your needs, ask Copilot to add a slide, or start over with a new presentation and refine your prompt to include more specifics. For example, "Create a presentation about hybrid meeting best practices that includes examples for team building."
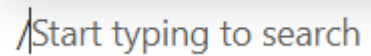
Use the Slash Command in Copilot
In Copilot you can type a slash/ to search or grab information.

Example:

You need a PowerPoint presentation based on a Word document. In the Copilot prompt box, type a slash /followed by the name of the file.

Copilot will then provide suggestions.

New Presentation with Prompts

When you start a new presentation, you can have Copilot create a first draft for you. Select Copilot on the ribbon to launch the Copilot pane, then tell it what you want or use the suggested prompts. For example, you could enter "Create a presentation about the history of soccer," and it will get that started for you.

Summarize a Presentation

Receive a long presentation and need to get to the gist of the main points quickly? Copilot in PowerPoint can read through the presentation and give you a bulleted summary so you can understand the key points.

1. Select the Copilot button from the ribbon.
2. The Copilot pane opens on the right side of your screen.
3. Click Summarize this Presentation.

Copilot includes references to show where it pulled information from in the presentation.
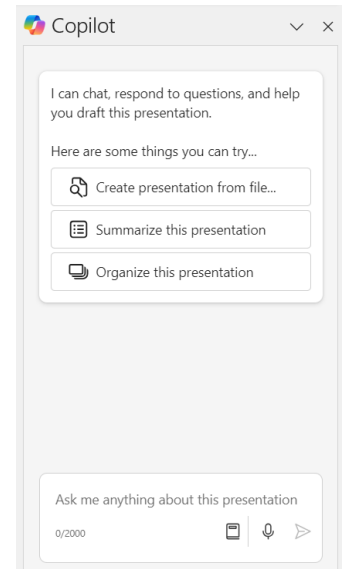
Organize a Presentation

As you're creating a presentation, you may be unsure of how to organize your slides into sections. Copilot in PowerPoint can help.

You can ask Copilot to organize your presentation. It will organize them into sections, and then add section heading slides.

If you don't like what Copilot does, you can simply click the Undo button on the ribbon to restore your presentation to its previous state.

- In the ribbon, select the Copilot button.
- The Copilot pane opens on the right side of your screen.
- Click Organize this presentation.

Add a Slide or Image

Imagine that you want to add a slide to your deck on the history of soccer. You can instruct Copilot to "Add a slide about the history of Women's Olympic Soccer," and Copilot will create the slide for you.

Copilot can help make your great work even better. Suppose you've created a presentation on a new location you're opening, but it still lacks imagery. You could prompt Copilot to "Add an image of a store under construction," and Copilot will insert a picture to make your presentation more appealing.

Copilot in PowerPoint can create an entire presentation or add a slide when needed.

In the "Ask me anything about this presentation" box, type what you want.

Example: **Add a new slide about interacting in the Teams meeting.**
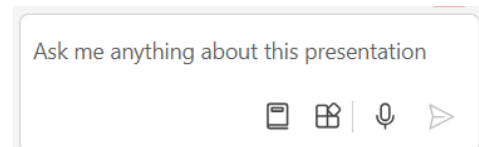
Once you have a slide added, ask Copilot to create an image to go on the slide.