



MICROSOFT COPILOT IN OUTLOOK & TEAMS

WORK SMARTER WITH AI



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What is Microsoft Copilot 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.



Microsoft 365 App	Feature	Description
	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.
	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.

Ensure You Have Access

Before you start using Copilot, ensure that you have:

- A Microsoft 365 subscription that includes access to Copilot. This feature is generally included in business and enterprise plans.
- The latest version of Outlook is installed. Update your application to ensure you have the latest features and security updates.

Limitations of Using Copilot

While I find Copilot in Excel to be a powerful tool, I've noticed it has some limitations that I need to keep in mind:

- **Dependency on Cloud Storage:** I must save my workbook in the cloud (OneDrive or SharePoint) for Copilot to function properly. This requires a stable internet connection to access its features effectively.
- **Subscription Requirements:** Copilot is only available to those with specific Microsoft 365 subscriptions. Without the appropriate subscription, I won't be able to use Copilot.



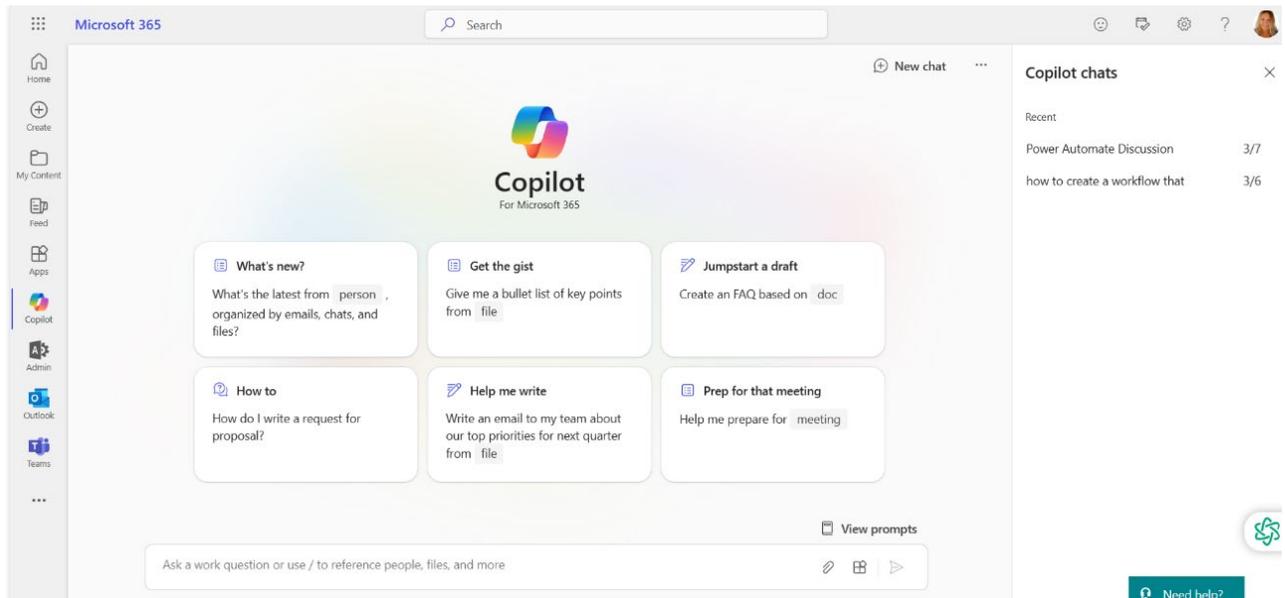
- **Data Structure:** I've realized that Copilot works best with well-structured data, ideally formatted as tables. If my data is messy or unorganized, Copilot may struggle to provide accurate insights.

Access Copilot 365

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

You can open Copilot from:

- Taskbar
- Microsoft Account
- Teams





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.

Using a Work account gives you advantages over a personal account. Most important is that you will be automatically connected to all other Microsoft 365 apps for fully connectivity.

Using the Copilot App

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?



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.

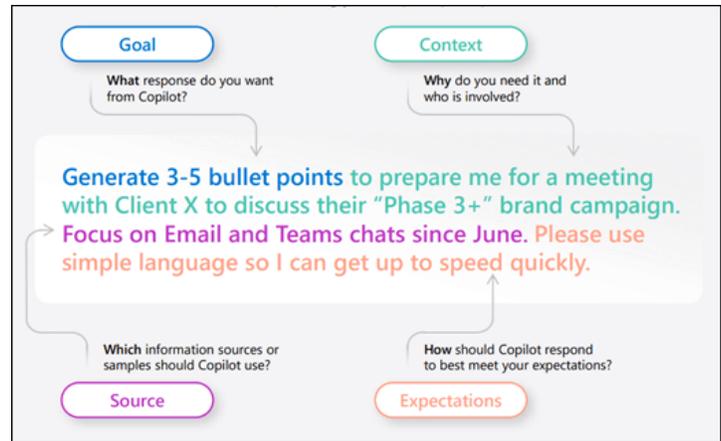


Include the right prompt ingredients.

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.



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

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.

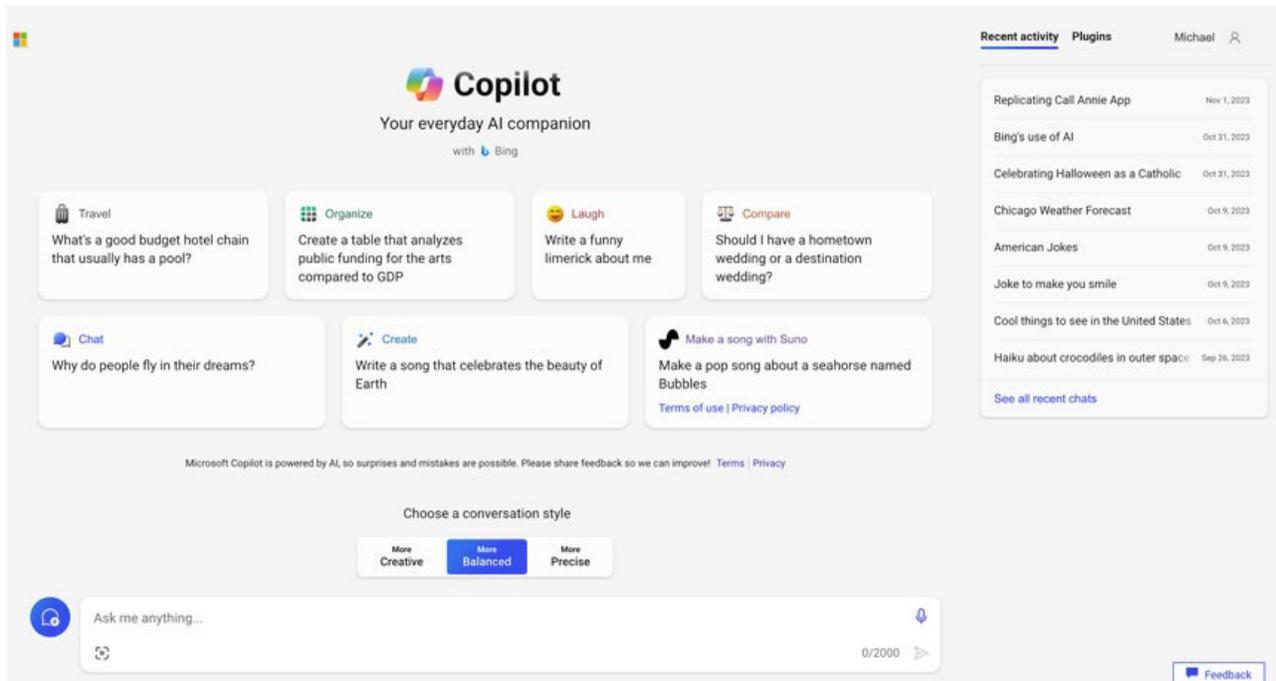
How you structure and format your prompt can have a significant impact on the quality and diversity of the images you get.

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...



Outlook Copilot

You can leverage Copilot in Outlook to streamline your workflow and enhance productivity. Here are some specific ways Copilot can assist you:

1. Managing Client Communications

- **Draft Professional Emails:** Use Copilot to draft emails to clients, ensuring your communications are clear and professional.
- **Summarize Email Threads:** Quickly catch up on long email threads with clients or colleagues by having Copilot summarize the key points.



2. Scheduling Meetings

- **Set Up Client Meetings:** Easily schedule meetings with clients to discuss financial reports, tax planning, or other accounting matters.
- **Recurring Meetings:** Set up recurring meetings for regular check-ins with clients or team members.

3. Organizing Tasks and Deadlines

- **Set Reminders:** Use Copilot to set reminders for important deadlines, such as tax filing dates, financial report submissions, and client follow-ups.
- **Task Management:** Organize your tasks by categorizing them into different lists, such as "Client Work," "Internal Reports," and "Urgent Deadlines."

4. Preparing for Meetings

- **Generate Agendas:** Create detailed agendas for client meetings, including discussion points, financial updates, and action items.
- **Summarize Financial Documents:** Have Copilot summarize key points from financial documents or reports, helping you prepare for discussions.



5. Enhancing Collaboration

- **Share Documents:** Easily share financial reports, spreadsheets, and other documents with clients or team members directly from Outlook.
- **Assign Tasks:** Assign tasks to team members and set reminders for follow-ups, ensuring everyone stays on track.

6. Automating Routine Communications

- **Email Templates:** Create and save email templates for routine communications, such as monthly financial updates or tax reminders.
- **Follow-Up Emails:** Use Copilot to generate follow-up emails based on previous communications, saving you time.

Example Usage

Scenario: You need to schedule a quarterly review meeting with a client. **Steps:**

1. **Open Outlook** and click on the Copilot icon.
2. **Select 'New Event'** and enter the meeting details:
 - **Title:** Quarterly Review Meeting
 - **Location:** Virtual (Zoom/Teams)
 - **Participants:** Client and relevant team members
 - **Date and Time:** Choose a suitable date and time
3. **Generate an Agenda:** Ask Copilot to create an agenda for the meeting, including financial performance review, tax planning, and next steps.
4. **Send Invites:** Copilot will send out the meeting invites and set reminders.

These features can help you stay organized, improve client communication, and manage your workload more effectively.

Best Practices to Make the Most Out of Copilot in Your Tasks

Using Copilot can greatly enhance your efficiency and accuracy. Here are some best practices to make the most out of Copilot in your tasks:

1. Streamline Client Communications

- **Use Templates:** Create and save email templates for routine communications like monthly financial updates, tax reminders, and invoice follow-ups. This saves time and ensures consistency.





- **Summarize Long Threads:** Utilize Copilot to summarize lengthy email threads, helping you quickly catch up on important discussions without reading every message.

2. Efficient Scheduling

- **Automate Meeting Invites:** Schedule client meetings, internal reviews, and team check-ins using Copilot. Ensure all relevant details and agendas are included in the invites.
- **Set Recurring Events:** For regular tasks like monthly financial reviews or quarterly tax planning meetings, set up recurring events to keep your calendar organized.

3. Task and Deadline Management

- **Set Reminders:** Use Copilot to set reminders for critical deadlines such as tax filing dates, financial report submissions, and client follow-ups. This helps you stay on top of your responsibilities.
- **Organize Tasks:** Categorize tasks into lists like "Client Work," "Internal Reports," and "Urgent Deadlines" to prioritize your workload effectively.

4. Prepare Thoroughly for Meetings

- **Generate Agendas:** Create detailed agendas for client meetings, including discussion points, financial updates, and action items. This ensures meetings are productive and focused.
- **Summarize Documents:** Have Copilot summarize key points from financial documents or reports to help you prepare for discussions.

5. Enhance Collaboration

- **Share Documents:** Easily share financial reports, spreadsheets, and other documents with clients or team members directly from Outlook. This facilitates smooth collaboration.
- **Assign Tasks:** Assign tasks to team members and set reminders for follow-ups, ensuring everyone stays on track.



6. Automate Routine Processes

- **Follow-Up Emails:** Use Copilot to generate follow-up emails based on previous communications, saving you time and ensuring timely responses.
- **Track Progress:** Regularly update the status of tasks and use Copilot to track progress, ensuring all tasks are completed on time.



7. Maintain Data Security

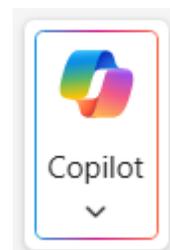
- **Confidentiality:** Ensure that sensitive financial information is handled securely. Use encrypted emails and secure document sharing methods.
- **Regular Backups:** Regularly back up important emails and documents to prevent data loss.

By following these best practices, you can leverage Copilot to improve your efficiency, accuracy, and overall productivity in accounting.

Working with Email and Copilot

Copilot can enhance your email experience in several ways beyond drafting and scheduling meetings. Here are some additional features:

1. **Summarize Long Threads:** Copilot can condense lengthy email threads into key points, making it easier to catch up on conversations.
2. **Generate Responses:** Based on the context of an email, Copilot can suggest appropriate responses, saving you time.
3. **Organize Emails:** It can help categorize and prioritize your emails, ensuring you focus on the most important ones first.
4. **Set Reminders:** Copilot can set reminders for follow-ups or important tasks mentioned in your emails.
5. **Translate Emails:** If you receive emails in different languages, Copilot can translate them for you.
6. **Extract Key Information:** It can pull out important details like dates, times, and action items from your emails.
7. **Create Templates:** You can use Copilot to create and save email templates for frequently sent messages.



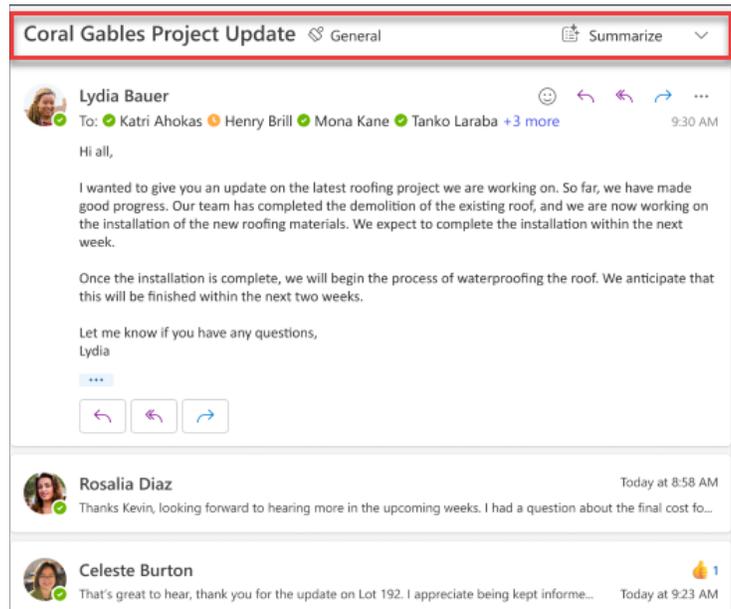
These features can help streamline your email management and improve productivity.



Summarize An Email

Use email summaries to get through long email threads and catch up on the conversation quickly.

1. Select a conversation from your inbox.
2. Select the Summary by Copilot box at the top of the email thread in new Outlook or select Summarize if you're using classic Outlook. Copilot will scan the thread to look for key points and create a summary for you.



When it's completed, the summary will appear at the top of the email and may also include numbered citations that, when selected, take you to the corresponding email in the thread.

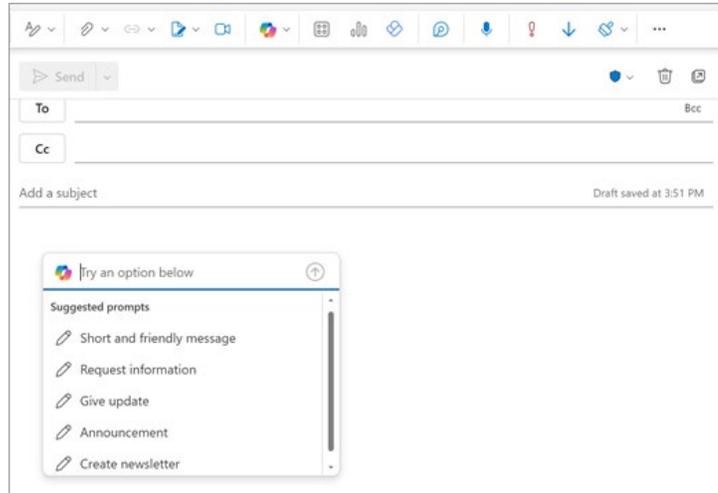
Draft an Email with Copilot

Drafting an email with Copilot in Outlook is straightforward and efficient. Here's how you can do it:

1. Select Home > New Mail.
2. Select the Copilot icon  from the toolbar, and then from the drop-down menu, select Draft if you're using new Outlook, or Draft with Copilot if you're using classic Outlook.



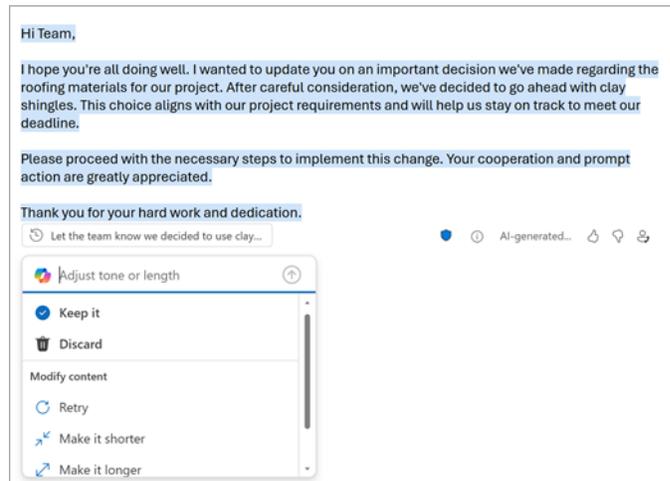
3. In the Copilot box, type your prompt. For example, *"Let the team know we decided to use clay shingles and to go ahead so we meet the deadline."*
4. Select Generate (in new Outlook it's an arrow button). Copilot will draft a message for you.
5. If desired, you can then change the length and tone. In new Outlook, select Make it shorter, Make it longer, or scroll and select Change Tone. In classic Outlook, select Adjust, then choose an option.
6. Review the output. If it's not quite what you want, select Retry in new Outlook or Regenerate in classic Outlook. Copilot will create a new version. Or, to completely start over, select the prompt text, change your prompt, then select Generate again.
7. When you're satisfied with the output, select Keep it or Keep. Edit the draft as needed, and then select Send when you're ready.



Summarizing an Email with Copilot

Copilot summarizes emails by analyzing the content and extracting the most important points. Here's how it works:

1. **Content Analysis:** Copilot scans the entire email thread to understand the context and key themes.
2. **Key Points Extraction:** It identifies and extracts the main points, such as important decisions, action items, deadlines, and any critical information.
3. **Summary Generation:** Based on the extracted information, Copilot generates a concise summary that highlights the essential details.





For example, if you have a long email thread discussing a project, Copilot might summarize it like this:

Summary of Project Discussion:

- **Project Progress:** Initial design phase completed; development phase started.
- **Upcoming Deadlines:** Development phase to be completed by March 25th.
- **Issues/Concerns:** Minor issue with software integration; developers are working on a solution.
- **Next Steps:** Schedule a meeting to review progress and plan next steps.

This way, you can quickly grasp the key points without reading through the entire thread.

Organizing Emails with Copilot

Using Microsoft Copilot in Outlook can significantly streamline your email management. Here are some key ways to organize your emails with Copilot:

1. **Summarize Emails:** Copilot can quickly summarize long email threads, helping you catch up on conversations without reading every message. Just ask Copilot to "summarize this email thread" and it will provide a concise overview.
2. **Categorize Emails:** You can create rules to categorize emails by sender or subject. For example, you can ask Copilot to "create an inbox rule to categorize all emails from [specific sender] as [color/category]"
3. **Draft Responses:** Copilot can help draft email responses based on the context of the received email. You can start a new email or reply to an existing one and ask Copilot to "draft a response".
4. **Catch Up on Emails:** If you have a busy inbox, you can ask Copilot to "catch me up on emails from the past day" and it will organize and summarize them by topic.

To get started, make sure your Microsoft 365 subscription includes Copilot, and that Outlook is updated to the latest version. Then, look for the Copilot icon in the Outlook toolbar to activate it.



Set Reminders with Copilot

Copilot can help you set reminders for follow-ups or important tasks mentioned in your emails, ensuring you stay on top of your responsibilities. Here's how it works:

Here's a step-by-step guide to setting reminders with Copilot:

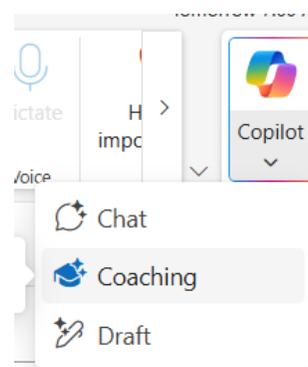
1. **Open the email** that contains the task or follow-up you want to set a reminder for.
2. **Highlight the relevant text** or simply click on the Copilot icon.
3. **Select 'Set Reminder'** from the Copilot menu.
4. **Specify the date and time** for the reminder.
5. **Confirm the reminder** and Copilot will add it to your calendar or task manager.

For example, if you receive an email asking you to submit a report by March 20th, Copilot can set a reminder for March 19th to ensure you complete the task on time.

Get Email Coaching With Copilot In Outlook

If you need to write an important email and want to ensure it effectively communicates your intended message, Copilot in Outlook can provide valuable suggestions. It assists in adjusting the tone, enhancing clarity, and considering reader sentiment before you send the email.

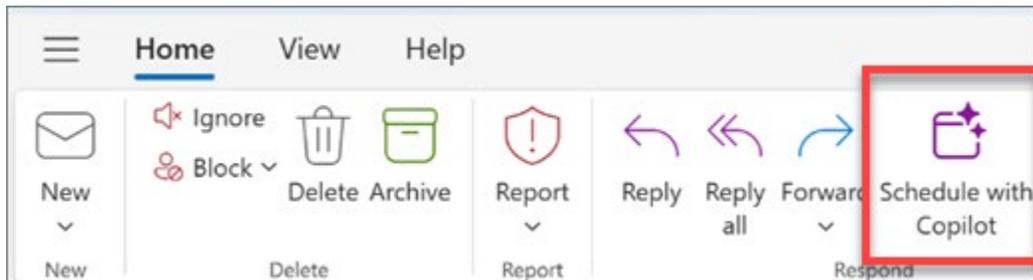
1. In New Mail. Type your email message.
2. Select the Copilot icon  from the toolbar. Choose Coaching by Copilot from the drop-down menu.
3. Copilot will review your email and offer suggestions on improving the tone, clarity, and reader sentiment.
4. If you'd like to apply all of Copilot's suggestions at once, simply click the Apply all suggestions button. This will regenerate your email text using the recommended improvements. If you prefer to incorporate suggestions individually, you can do so manually.
5. Once you're satisfied, send your email.





Send A Meeting Invitation

In new Outlook, you can use the Schedule with Copilot option in the toolbar to quickly create a meeting invitation from within an email.



Copilot helps you create the invitation—the meeting title and agenda are filled in for you, and the email thread is added as an attachment. The people on the email thread are included as meeting attendees, and you can quickly review the invitation, add or change things, then send it out.

Copilot leverages GPT, a new AI system from OpenAI that creates text based on a prompt. As it is a new system, it may create things you didn't expect. If you find content to be unexpected or offensive, send us feedback so we can make it better. Also, because the content is generated by AI that draws from the internet, it may contain inaccuracies or sensitive material. Be sure to review and verify the information that it generates. And note that similar requests may result in the same content being generated.

For example, if you need to draft an email to a colleague about a project update, you might provide Copilot with points like:

- Project progress
- Upcoming deadlines
- Any issues or concerns

Copilot will then create a coherent and professional email based on these points.



How to Turn an Email into a Meeting

Turning an email into a meeting with Copilot in Outlook is a great way to streamline your scheduling process. Here's how you can do it:

1. **Open the Email:** Navigate to the email you want to turn into a meeting.
2. **Click on the Copilot Icon:** In the toolbar, click on the Copilot icon.
3. **Select 'Schedule Meeting':** Choose the option to schedule a meeting from the Copilot menu.
4. **Review Suggested Details:** Copilot will analyze the email content and suggest meeting details such as the title, agenda, and participants.
5. **Customize the Meeting:** You can adjust the suggested details as needed, including the date, time, and location.
6. **Send the Invite:** Once you're satisfied with the meeting details, click 'Send' to send out the meeting invitation.

Outlook Calendar and Copilot

To use Copilot with Outlook Calendar:

- Ask the Copilot chat about your weekly or daily meetings, and it will provide a summary of your schedule, including meeting times and participants.
- In an email conversation where a meeting is necessary, click the Copilot icon and instruct it to “schedule a meeting with [name/team]”. Copilot will suggest available times based on everyone's calendars, allowing you to confirm a meeting time.
- To communicate with your team, open a new message in Outlook, click the Copilot icon, and select Draft with Copilot. Type your message, and Copilot will create a draft for you.

 Find that meeting

When's my next [Quarterly Review meeting] ?



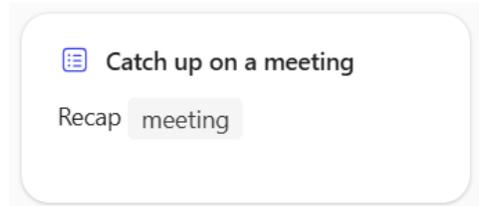
Examples Of Using Copilot in Calendar

Here are some practical examples of how you can use Copilot in Outlook Calendar:

1. Scheduling a Team Meeting

Scenario: You need to schedule a weekly team meeting. **Steps:**

1. **Open Outlook Calendar** and click on the Copilot icon.
2. **Select 'New Event'** and enter the meeting details:
 - **Title:** Weekly Team Meeting
 - **Location:** Conference Room A
 - **Participants:** Team members
 - **Recurrence:** Every Monday at 10:00 AM
3. **Generate an agenda:** Ask Copilot to create an agenda based on the meeting's purpose.
4. **Send invites:** Copilot will send out the meeting invites and set reminders.



2. Preparing for a Project Review

Scenario: You have a project review meeting coming up. **Steps:**

1. **Open the meeting event** in your calendar.
2. **Use Copilot to summarize related emails:** Copilot will provide a summary of key points from emails discussing the project.
3. **Create an agenda:** Ask Copilot to draft an agenda for the review meeting, including progress updates, upcoming deadlines, and any issues.
4. **Set reminders:** Copilot can set reminders for you to review materials before the meeting.

3. Setting Up Focus Time

Scenario: You need dedicated time for focused work. **Steps:**

1. **Open Outlook Calendar** and click on the Copilot icon.
2. **Select 'New Event'** and enter the details:
 - **Title:** Focus Time
 - **Location:** Your workspace
 - **Duration:** 2 hours



- **Recurrence:** Daily or weekly, as needed
- 3. **Block time:** Copilot will block this time in your calendar and set reminders to minimize interruptions.

4. Managing Recurring Events

Scenario: You have a recurring client meeting. **Steps:**

1. **Open Outlook Calendar** and click on the Copilot icon.
2. **Select 'New Event'** and enter the meeting details:
 - **Title:** Monthly Client Meeting
 - **Location:** Virtual (Zoom/Teams)
 - **Participants:** Client and team members
 - **Recurrence:** First Tuesday of every month at 2:00 PM
3. **Generate an agenda:** Ask Copilot to create an agenda for each occurrence.
4. **Send invites:** Copilot will send out the recurring meeting invites and set reminders.

5. Creating and Managing Events from Email Threads

Scenario: You need to schedule a meeting based on an email discussion. **Steps:**

1. **Open the email thread** discussing the meeting.
2. **Click 'Schedule with Copilot'** in the toolbar.
3. **Copilot will analyze the email** and suggest meeting details, including title, agenda, and participants.
4. **Review and send** the meeting invitation.

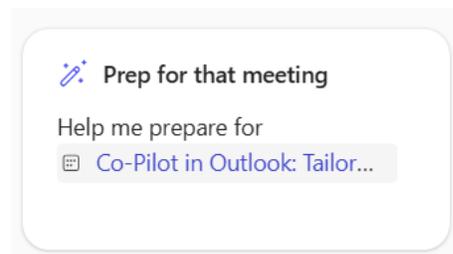
These examples demonstrate how Copilot can streamline your calendar management and improve productivity.

Use Copilot to Prep for Meetings

Copilot can help you prepare for meetings in several effective ways:

1. Summarize Relevant Emails and Documents

- **Email Summaries:** Copilot can scan your inbox for emails related to the meeting and provide a summary of key points, decisions, and action items.
- **Document Highlights:** It can also highlight important sections from attached documents or shared files, ensuring you have all the necessary information at your fingertips.





2. Create Agendas

- **Draft Agendas:** Based on the meeting's purpose and previous communications, Copilot can draft a detailed agenda. You can review and customize this agenda before sending it out to participants.
- **Agenda Templates:** Save time by using Copilot to create reusable agenda templates for recurring meetings.

3. Identify Action Items

- **Task Extraction:** Copilot can identify and list action items from previous meetings or related emails, helping you keep track of what needs to be discussed or followed up on.
- **Assign Tasks:** You can assign these tasks to specific participants directly from the agenda or meeting invite.

4. Provide Contextual Insights

- **Contextual Information:** Copilot can provide insights and context about the meeting participants, such as their roles, recent interactions, and relevant projects. This helps you tailor your discussions more effectively.
- **Meeting History:** Review summaries of previous meetings to understand ongoing discussions and decisions.

5. Schedule and Send Invites

- **Smart Scheduling:** Copilot can suggest optimal meeting times based on participants' availability and time zones.
- **Send Invites:** It can send out meeting invites with all the necessary details, including the agenda and any pre-meeting materials.

6. Set Reminders

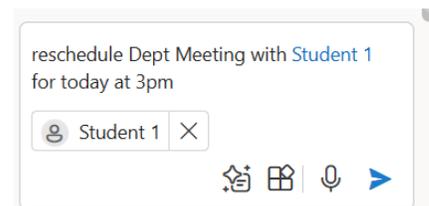
- **Pre-Meeting Reminders:** Copilot can set reminders for you to review materials or prepare specific points before the meeting.
- **Follow-Up Reminders:** After the meeting, it can remind you to follow up on action items or send out meeting minutes.

These features ensure you're well-prepared and organized for every meeting.

Rescheduling events with Copilot in Outlook

Rescheduling events with Copilot in Outlook is straightforward. Here's how you can do it:

1. **Identify the Event:** First, specify the event you want to reschedule. You can mention the event by its name or the participants involved.
2. **Provide New Details:** State the new date and time for the event. For example, you can say, "reschedule my meeting with [person] to [new date and time]".
3. **Confirm Changes:** Copilot will check your calendar for conflicts and suggest the best available time.





Once confirmed, it will update the event and notify all participants.

Here's a step-by-step example:

- **You:** "Reschedule my meeting with John to next Monday at 3 PM."
- **Copilot:** "Checking your calendar... Your meeting with John has been rescheduled to next Monday at 3 PM. All participants have been notified."

This process ensures your calendar stays up-to-date and everyone involved is informed of the changes.

Use Copilot in Contacts

Using Copilot with Outlook contacts can help you manage and interact with your contacts more efficiently. Here are some ways to leverage Copilot for your Outlook contacts:

1. **Adding Contacts:** You can ask Copilot to add new contacts to your address book. For example, "add [name] with email [email address] to my contacts".
2. **Updating Contact Information:** If you need to update details for an existing contact, you can say, "update [name]'s phone number to [new number]".
3. **Finding Contacts:** Quickly locate a contact by asking Copilot to "find [name] in my contacts".
4. **Sending Emails to Contacts:** You can streamline email communication by asking Copilot to "send an email to [name]" and provide the message content.
5. **Creating Contact Groups:** Organize your contacts into groups for easier communication. For example, "create a group named [group name] with [names of contacts]".
6. **Setting Reminders for Contacts:** Set reminders for follow-ups or important dates related to your contacts. For instance, "set a reminder to call [name] next Monday".

These features can help you keep your contact list organized and ensure you stay connected with important people.



Use Copilot with Microsoft To Do

Yes, you can use Copilot in Microsoft To Do to enhance your task management. Here are some ways Copilot can assist you:

1. Create and Manage Tasks

- **Add New Tasks:** You can quickly add new tasks by simply telling Copilot what you need to do. For example, "Add a task to call the client tomorrow at 10 AM."
- **Set Due Dates and Reminders:** Copilot can help you set due dates and reminders for your tasks, ensuring you never miss a deadline.

2. Organize Tasks

- **Categorize Tasks:** Copilot can categorize your tasks into different lists, such as "Work," "Personal," "Urgent," and "Follow-Up."
- **Prioritize Tasks:** It can help you prioritize tasks based on their importance and deadlines, so you focus on what matters most.

3. Track Progress

- **Update Task Status:** You can update the status of your tasks, marking them as in progress or completed. Copilot can keep track of your progress and provide summaries.
- **Set Recurring Tasks:** For tasks that repeat regularly, Copilot can set them up as recurring tasks, saving you time.

4. Collaborate with Others

- **Share Task Lists:** You can share task lists with colleagues or family members, allowing for better collaboration.
- **Assign Tasks:** Copilot can help you assign tasks to specific people, ensuring everyone knows their responsibilities.

5. Integrate with Other Apps

- **Sync with Outlook:** Copilot can sync your tasks with Outlook, ensuring your calendar and task list are always up to date.
- **Use with Teams:** You can integrate Copilot with Microsoft Teams to manage tasks directly from your team chats.

Example Usage

Scenario: You need to organize a project. **Steps:**



1. **Create a Project List:** "Create a new list called 'Project XYZ'."
2. **Add Tasks:** "Add a task to 'Project XYZ' to draft the project proposal by March 15th."
3. **Set Reminders:** "Set a reminder for the project proposal task for March 14th."
4. **Assign Tasks:** "Assign the task to draft the project proposal to [Colleague's Name]."
5. **Track Progress:** "Mark the task to draft the project proposal as in progress."

These features can help you stay organized and productive.

Chatting with Copilot

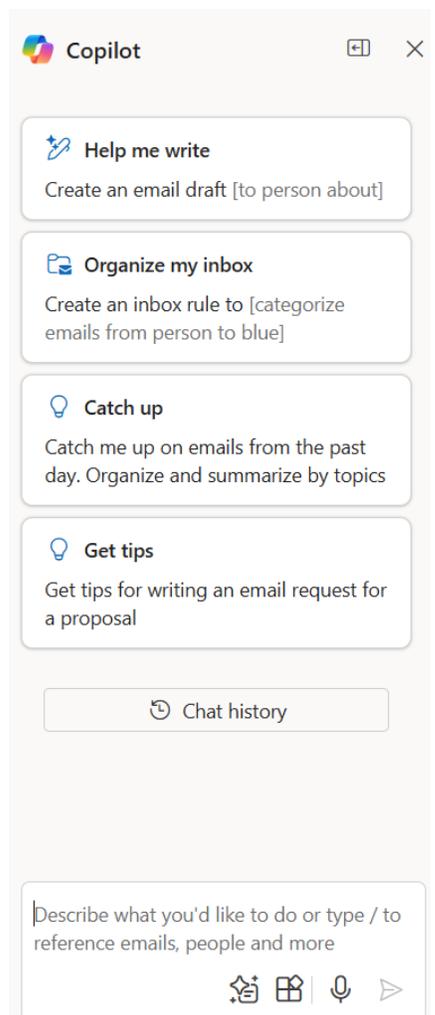
Chatting with Copilot in Outlook can enhance your productivity and streamline your workflow. Here's how you can use the chat feature:

Steps to Chat with Copilot in Outlook

1. **Open Outlook:** Navigate to your inbox or calendar.
2. **Click on the Copilot Icon:** In the toolbar, click on the Copilot icon to open the chat window.
3. **Start a Conversation:** Type your query or request in the chat window. You can ask Copilot to help with various tasks such as drafting emails, scheduling meetings, summarizing threads, or setting reminders.
4. **Receive Real-Time Assistance:** Copilot will provide real-time responses and suggestions based on your query.

Additional Features

- **Summarize Emails:** Ask Copilot to summarize long email threads to quickly catch up on important points.
- **Schedule Meetings:** Use the chat to schedule meetings and generate agendas.
- **Set Reminders:** Set reminders for follow-ups or important tasks directly from the chat.
- **Get Insights:** Ask Copilot for insights or recommendations based on your emails and calendar events.





These features can help you manage your tasks more efficiently and improve your productivity.

Copilot in Teams

The new Copilot app in Microsoft Teams gives you personalized information, such as your meetings, files, or colleagues. Go back to your chat history with Copilot anytime you need a reminder and explore a range of prompts in the Copilot Lab to get the most out of your experience. The Copilot app is located at the top of your chat conversations and is currently offered with a Copilot for M365 license.

When you first open Copilot in chat, you will be presented with best practices for using Copilot and suggested prompts to get you started. Use Copilot to:

Summarize

- List out key points from [a file]
- Recap your last meeting
- Summarize unread emails from [this person]

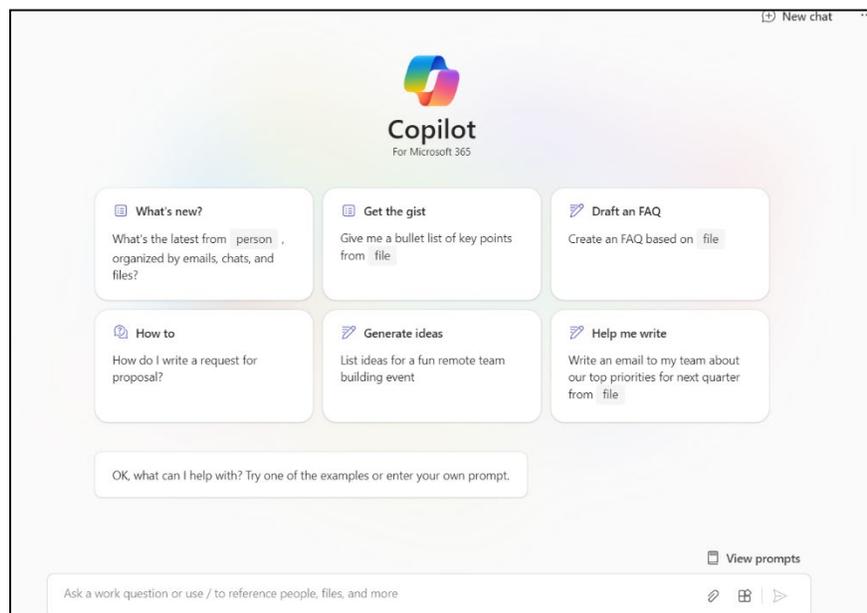
Create

- Create an FAQ based on [a file]
- Write an intro to [an email]
- Suggest 5 compelling titles for [a file]

Ask

- What's my next meeting?
- Who am I meeting with tomorrow?
- Where was I mentioned by [a person]?

Some suggested prompts require you to refer to files or other data sources, which are indicated by blue text. Copilot will suggest a list of items you can choose from. To select





something not on the list, type in the reference after the slash "/" in the compose box and select from the newly generated options.

Allow some time for Copilot to provide a response. After Copilot provides a response, ask clarifying questions, provide additional information, refine the output, or type another question that continues the conversation for up to 20 queries.

Select New Topic above the compose box to restart the conversation context with a new query and suggested prompts. Your previous chat history with Copilot will still be visible.

Copilot in Microsoft Teams can be accessed in various ways, depending on the user's needs and the organization's settings. Here are some key locations where Copilot can be utilized:

- **In Meetings:** Copilot can be used during or after meetings to summarize key discussion points, suggest action items, and answer questions in real time. It requires transcription to function, and the meeting organizer can control its use.
- **In Chat and Channels:** Copilot helps users quickly review conversations by summarizing main points, action items, and decisions. It references information from the message thread in which it is opened, with a default time frame of 30 days.
- **In Meeting Summaries:** Copilot automatically listens for key points, action items, and decisions during meetings, providing a complete summary with bullet points and key takeaways.
- **In Teams Phone and Rooms:** Copilot enhances Teams Phone and Teams Rooms experiences with features like responding to open-ended questions and providing meeting insights. These features make Copilot a versatile tool for improving collaboration and productivity within Microsoft Teams.

Copilot in Teams Meetings

Copilot in Microsoft Teams enhances collaboration and helps you get the most out of your Teams chats and meetings. Quickly recap, identify follow-up tasks, create agendas, and ask questions for more effective and focused meetings. Summarize key takeaways, see what you've missed, and pinpoint key people of interest in chat threads you were added to. All without breaking the flow of discussion.

Copilot in Teams uses your Teams chat and meeting content to generate insights and actionable suggestions alongside your most important Teams touch points.



During a meeting - Use Copilot in Teams meetings to summarize key discussion points, including who said what and where people are aligned or disagree—and suggest action items, all in real time during a meeting.

Have a more effective meeting

Act as a thought partner by trying these prompts within the Copilot compose box to the right of your meeting window:

- Where do we disagree on this topic?
- How did [a meeting participant] respond to this proposal?
- What questions can I ask to move the meeting forward?
- Where are some holes in [a meeting participant's] argument?
- Create a table with the ideas discussed and their pros and cons.

You can also select More prompts below the Copilot compose box and choose from the following:

- Recap the meeting so far.
- List action items.
- Suggest follow-up questions.
- What questions are unresolved?
- List different perspectives by topic.
- List the main items we discussed.
- Generate meeting notes.

Wrap up a meeting with clear next steps

Copilot will send a prompt a few minutes before a meeting's scheduled end to help participants wrap up. Select Open Copilot to see a summary of key points of discussion and identify agreed-upon next steps, including tasks assigned to specific people. Participants can still make use of Copilot by asking if there are any unresolved issues or open topics from the agenda, or any other related questions that may help users to grasp the meeting wrap up.



After a Meeting

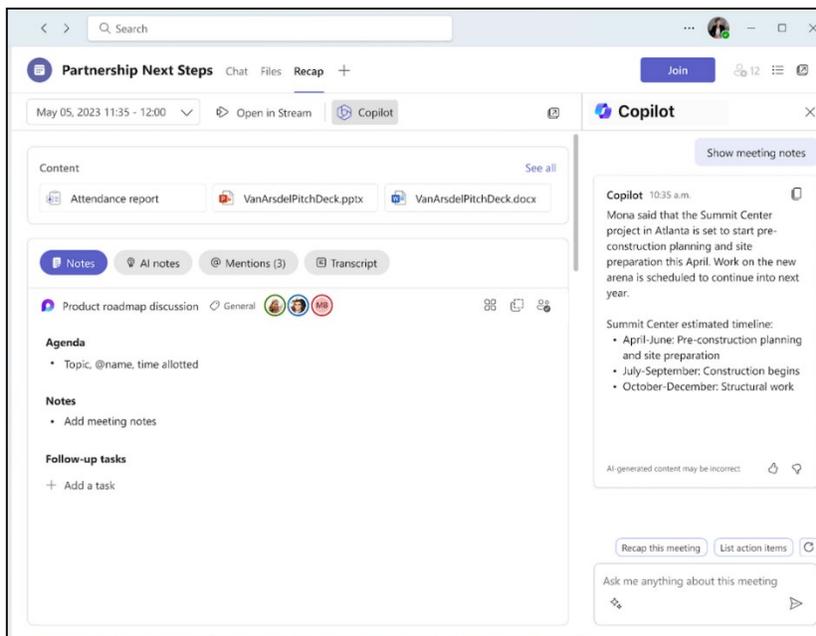
Copilot in Teams meetings will also be available once the meeting has ended in the meeting's Recap tab.

Notes:

- Intelligent recap is available as part of Teams Premium, an add-on license that provides additional features to make Teams meetings more personalized, intelligent, and secure. To get access to Teams Premium, contact your IT admin.
- Intelligent recap is also available as part of the Copilot for Microsoft 365 license.

From your Teams meeting chat, go to the Recap tab and open Copilot.

Here are some suggestions for prompts you might want to try. Copy them or modify



them to suit your needs.

- What questions were asked, answered, and unresolved?
- What was the mood of the meeting?
- Summarize what people said, in a less technical way.
- Why did [a meeting participant] say that this idea was a good one?
- For each participant, what was the biggest concern? What were they most excited about?
- What ideas did [a meeting participant] have that I can share with the product team?



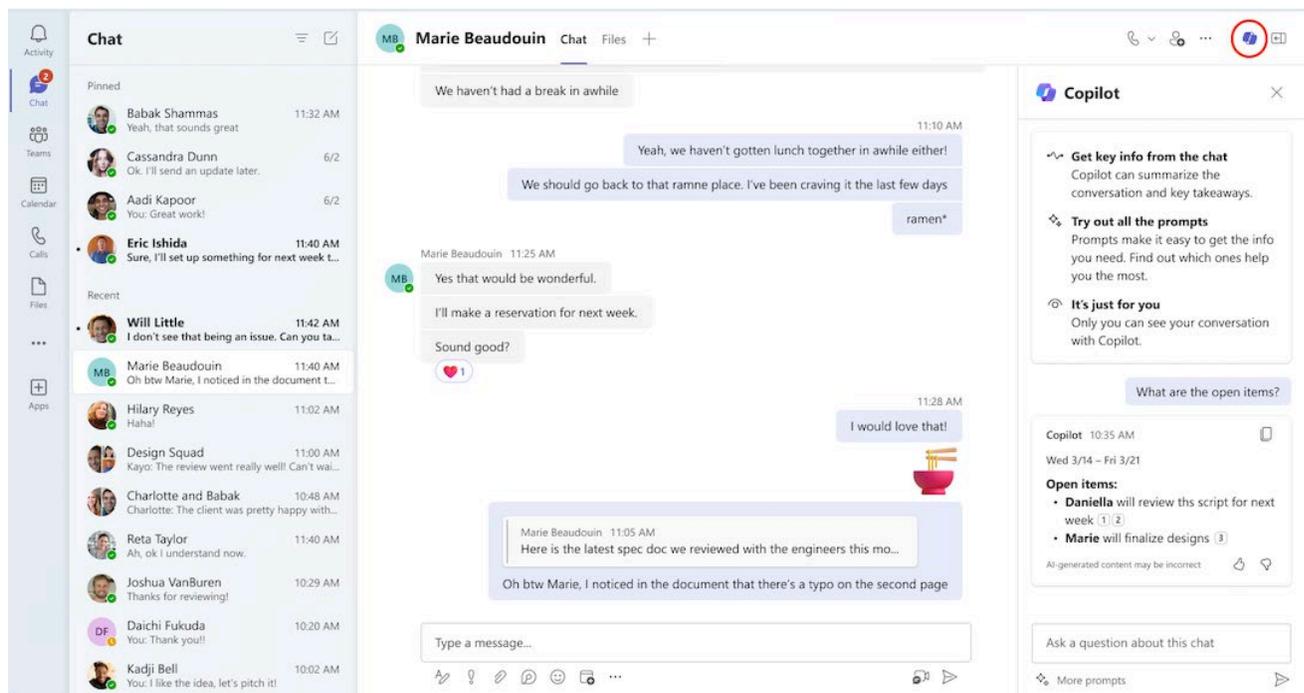
- Draft an email to the meeting participants that summarize the meeting and includes the action items.

Copilot in Teams Chats and Channels

Copilot in Microsoft Teams chat and channels helps you get up to speed on conversations by quickly reviewing the main points, action items, and decisions without having to scroll through long threads.

Note: Copilot references information from the message thread in which it is opened, with a 30-day history as the default time frame unless you specify otherwise. Copilot can't summarize images, loop components, or files shared in the chat thread.

Use Copilot in a one-on-one or group chat



1. Go to **Chat** on the left side of Teams, then select a specific chat from the list.
2. Select **Open Copilot** in the upper-right corner of the chat, you'll see the Copilot icon.
3. Under the compose box to the right of your chat, select **More prompts** to choose from the following options:
 - *Highlights from the past day.*
 - *Highlights from the past 7 days.*
 - *Highlights from the past 30 days.*



- *What decisions were made?*
 - *What are the open items?*
4. Type a prompt in the compose box, then select **Send**. Try these:
 - *Summarize what I've missed.*
 - *What were the key takeaways from last month?*
 - *What did [a member of the chat] say?*
 - *What links were shared?*
 5. Once Copilot responds, try this:
 - Include a clear time frame to get targeted results, like "December 2023" or "last month". Copilot will only consider the messages sent within the specified time period, as reflected by the timestamp in Copilot's response.

Tip: If the timeframe you've specified is above the limit for Copilot, select **Generate next response** to view the rest of the response.

- Select **Copy** at the upper-right corner of the response and paste into the chat, a channel conversation, or anywhere else.
- See citations by selecting the numbers next to each statement in the response. Once selected, the chat to the left of the Copilot pane will scroll to that particular message in the chat thread.
- Depending on your admin settings, you may have the option to leave feedback by selecting the **thumbs up** or **thumbs down** at the bottom-right of the response to send directly to Microsoft.

Use Copilot in a Meeting Chat

When your meeting is transcribed, Copilot references information from the meeting transcript in its responses.

Note: If your meeting wasn't transcribed, Copilot will reference information from the meeting chat conversation instead.

1. Go to **Chat** on the left side of Teams, then select a specific chat from the list.
2. Select **Open Copilot** in the upper-right corner of the chat, you'll see the Copilot icon.
3. Under the compose box to the right of your chat, select **View prompts** to choose from the following options:
 - *Recap the meeting*

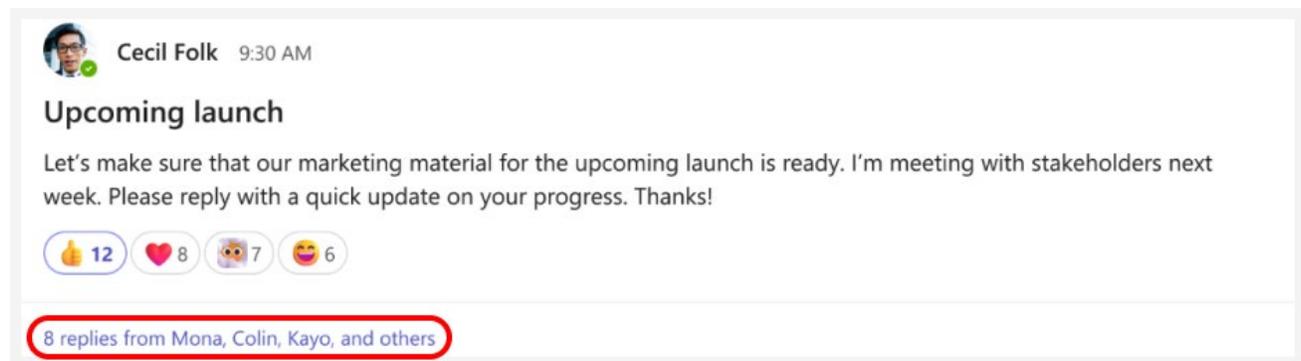


- List action items
- Suggest follow-up questions
- What questions are unresolved?
- List different perspectives by topic
- List main ideas we discussed
- Generate meeting notes
- Highlights from meeting chat

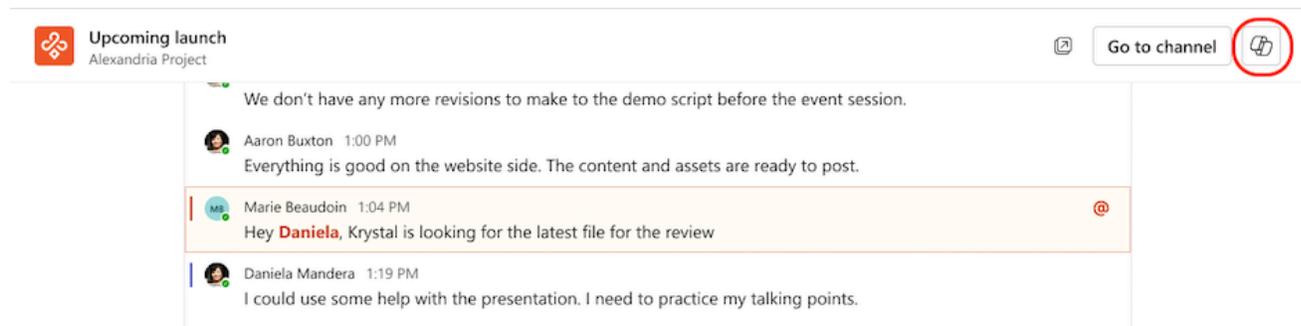
4. Type your own prompt in the compose box, then select **Send**.

Use Copilot in a Teams Channel

1. Go to **Teams** on the left side of Teams, then select a specific channel within a team.
2. Within the channel discussion, select the link below the channel post to expand the replies and see the full conversation.



3. From this immersive channel post view, select **Open Copilot** in the upper-right corner of the channel view.





4. Under the compose box to the right of your channel, select **More prompts** to choose from the following options:
 - *Highlights from the conversation.*
 - *What decisions were made?*
 - *What are the open items?*
5. Type a prompt in the compose box, then select **Send**.

Copilot empowers you to ask questions about your chat conversations in Teams. You can use Copilot to quickly review the main points, action items, and decisions from your chats, without having to scroll through long threads. You can also choose to view highlights from the past 1, 7, or 30 days of conversation.

Note: Copilot in Teams chat only uses data available in the chat thread you have open.

Copilot is available in the following chats and only references the meeting chat, not the meeting transcript:

- One-on-one and group chats.
- Single meeting chats or scheduled private meeting chats.
- Meet Now chats.

To access Copilot in Teams chats:

1. Select a chat in Teams, then select Copilot in the upper-right corner.
2. A pane will open to the right of the chat where you'll find introductory information about using Copilot in chat, and a compose box to ask a question about the chat.
3. Besides answering questions and summarizing the conversation, select More prompts below the compose box to guide you and quickly pull out the details you need.
4. In responses from Copilot, you will see citations to the relevant information in the chat thread. Selecting a citation will take you to the referenced message in the chat thread to the left.
5. Only you can see your conversations with Copilot, but if you'd like to share the response with someone else, select Copy at the top right of the individual response to copy the text. Then, paste it into another chat, channel conversation, or anywhere else.
6. To close Copilot in chat, select Copilot again or the X button at the top right of the pane.



Use suggested actions in chat

Suggested actions appear in Teams chat and, when selected, will open Copilot to the right of the chat. For example, when returning to a chat, if there are eight or more unread messages, you might see a clickable suggestion "Summarize what I've missed." Select the suggestion to open Copilot and generate a chat summary.