Copilot Scoping in OneNote

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Resources: Copilot Scoping Research Plan • Figma Prototype

Agenda

Background

Objective

From past AIX00 reports, we learned that users struggle with understanding the scope of Copilot in OneNote. Users want clarity on what portion of their OneNote content Copilot is reasoning over. Users also want the ability to change that scope to fit their needs.

Our team conducted user research to better understand user expectations around Copilot's scope in OneNote. We will use this data to inform our next set of investments.

Research Questions

1. Do users understand the scope of Copilot in OneNote?

2. Do users understand how to tailor the scope with Copilot in OneNote?

3. Do users understand OneNote's organizational structure?

4. What level of the OneNote organizational structure do users expect Copilot to function within OneNote?

5. How do users want to scope Copilot?

6. Do users want extra help to scope?

Method

60-minute moderated interviews across 5 participants • PlaybookUX

Prototypes

Prototype #1

Auto-scope

Figma prototype

Prototype #2
Scoping UI

Figma prototype

Prototype #3
Context IQ

Figma prototype

Sustainability goals - OneNote

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About Us

Wednesday, June 7, 2025

Welcome to Fabrikam, your trusted partner in sustainable housing solutions and green building practices. At Fabrikam, we are dedicated to creating environmentally friendly, energy-efficient, and comfortable homes that enrich the lives of our customers while minimizing our ecological footprint.

Our Vision

Our vision is to create a world where every home is an oasis of sustainability, where residents enjoy a high quality of life while contributing to the well-being of the planet. We believe in the power of sustainable design and construction to transform communities and reduce the impact of human activities on the environment.

Our Commitment to Sustainability

1. Green Building Practices
Fabrikam is known for its expertise in green building practices. We employ sustainable materials, energy-efficient technologies, and cutting-edge design principles to create homes that are not only beautiful but also eco-friendly. Our buildings are designed to achieve high levels of energy efficiency, reducing utility costs and carbon emissions.

Copilot

Welcome to Copilot!

Create
Help me plan [for a team offsite in Tucson from my notes on this page]

Understand
Summarize this page as a [status email]

Edit
Suggest 3 ways I can rewrite this to be [more complete]

Ask
How many [projects does the east coast team have]?

Describe what you'd like to do or use / to reference files, people, and more

0/2000

Key Takeaways

🧐 4/5 users in our study preferred the scoping UI prototype. Copilot scoping with Scoping UI was the clearest and most intuitive for users

📸 Users want Copilot to automatically scope its search based on their prompt. But users are uncertain about how to reference their intended scope in their prompt

📍 Some users expected their default scope to be the Pages not notebook, since that is the content they are looking at when interacting with Copilot

🤖 Context-IQ was not very discoverable, and seemed complex for the users in our research study

📺 Users have different understandings of OneNote's organizational hierarchy. The terms we use internally do not align with what they use

Deep dive

Prototype #1
Auto-scope

Users thought this method of scoping was more natural

- Users liked that Auto-scope did not require a lot of steps. The flow worked just using their prompt
- Auto-scope fit users' expectation that Copilot, an AI feature, should be smart enough to automatically get what they are saying with natural language

"...In this one...I didn't select out of the section or pages. I just wrote this page, and then immediately assumed that I'm talking about the page that is opened right now..." P5

"... I mean...it was very easy..." P5

"...I personally prefer 1st option [auto-scoping] more compared to this [context-IQ], because more option, you add, it becomes more complicated..." P3

But there was a bit of confusion on how to reference their intended scope

- When we asked users to try other scenarios using the prototype, they had to think of their own prompt, and they were uncertain about what word to use to reference their intended scope in their prompts.
- There was a wide range of words used in the study, like "tabs," "all pages in the tab," "folders," "notes" etc.

"...if I'm doing this for 1st time. I don't know. I don't know about the prompt. I don't know about the soft shortcut. Then it would be not easy for me" P3

"...it does meet my expectations, I think what I would probably need is a couple of hints, you know, where it can give you suggestions of things to ask" P2

"...I guess if you haven't shown me that 1st one [scoping UI], I probably would be, you know, completely fine with the second one [auto-scoping] but seeing the 1st one, I think that's the only caveat I would say is like adding that, and capability of you know, confirming my selection, or adjusting my selection if needed." P1

Prototype #2

Scoping UI

[Figma prototype](#)

Users found Scoping UI to be clear and intuitive

- Users were able to quickly identify the current scope of Copilot in the Scoping UI prototype

- Users also understood Scoping UI to be a tool they can use to change the scope

"...with the 1st iteration that was an education that I immediately knew just by looking at it...I can you know select whatever..." P1

"What I liked about that, was that it was clear straight away...it was really clear that that's where we are." P2

"...I would prefer scoping UI just because I have a visually cleaned call out that this is the notebook that any prompts, I type in here will be being addressed, and then I have that control before I even enter my prompt. I can change it." P1

Users expressed that Scoping UI helps them craft better prompts

- Scoping UI helped users in crafting their prompt when they saw the different places Copilot could search through. Users adjusted their prompts based on their selection

- Users also felt more confident that Copilot would reference the correct information

"It helps me recalibrate my prompt...maybe I wanted to give me action from this notebook. But then I realized you know what? There's so many other tabs and areas of focus. I may want it from the entire section, right? So, it just helps me preemptively make sure I have this cleaner conversations and prompts with co-pilot." P1

Microsoft

Users want Copilot to auto detect their scope in the affordance

- Users expected Copilot to auto change their scope using the "scope" referenced in their prompt. Users did not like the extra step to manually change the scope after referencing a scope in their prompt.

"I felt like it should have known to change it to this page, because I've typed in this page, whereas it felt like it was a bit of a long, winded process for me to have to then click on that purple thing to change it to this page." P1

"...my natural navigation method is that if I want to search something or know more details about a page or do a more research about it, I'm gonna go to that section like products and pricing or sustainable materials and have that conversation there." P1

Prototype #3

Context IQ

[Figma prototype](#)

Users struggled to discover Context IQ

- Even with some teaching guidance, users had a hard time figuring out how to use the "/" to invoke Context IQ UI.

- Context IQ relies heavily on teaching guidance

"I think obviously I wouldn't have known that you had to press that forward slash unless you told me so." P2

"...I would prefer scoping UI just because I have a visually cleaned call out that this is the notebook that any prompts, I type in here will be being addressed, and then I have that control before I even enter my prompt. I can change it." P1

The affordance in Context IQ was not intuitive to most users

- Some users felt like it was overly complicated, and the extra step of pressing the "/" button added more complexity

- Users also felt like they needed to learn a new way of prompting, which felt more technical

- A user expected the Context IQ dialogue to show up when they type in "from" instead of the keystroke "/"

"...this feels like it takes a little bit longer to do having to press forward slash, having to wait for your list of locations to come up..." P2

"...this seems more like a learning methodology like this is how I need to kind of interact with Copilot...I need to kinda adjust how I do prompting...a shift in my prompting techniques ..." P1

"...having me physically click on the button to get this dropdown feels like a more of a broken sort of prompt process to me..." P1

Microsoft

Recommendations
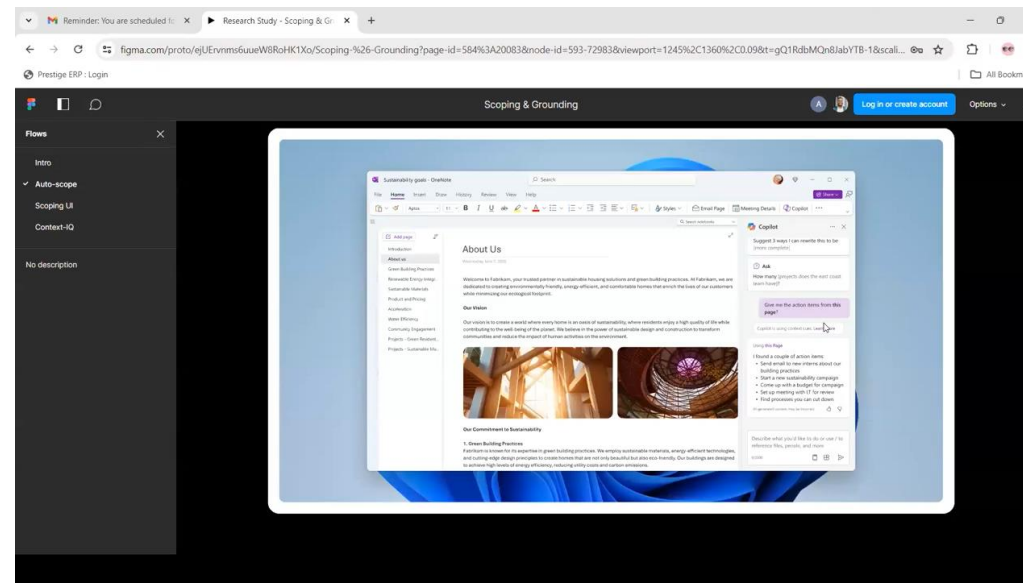
80% of users from our research study preferred Scoping UI
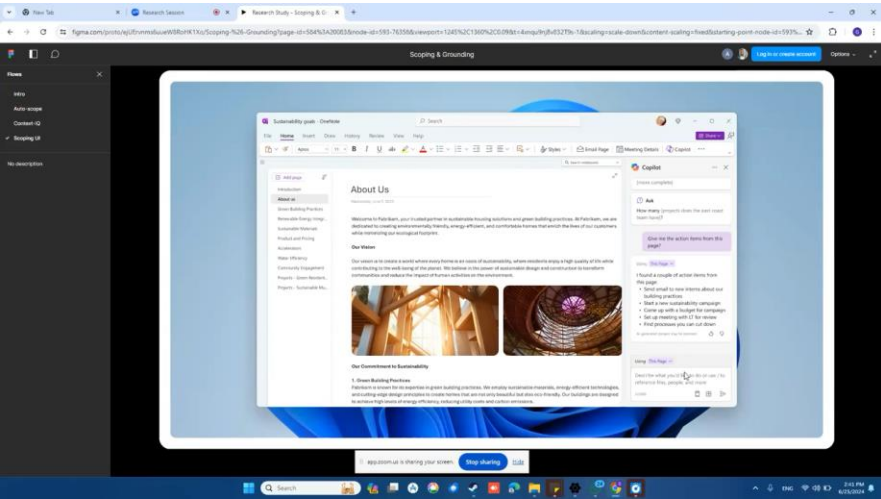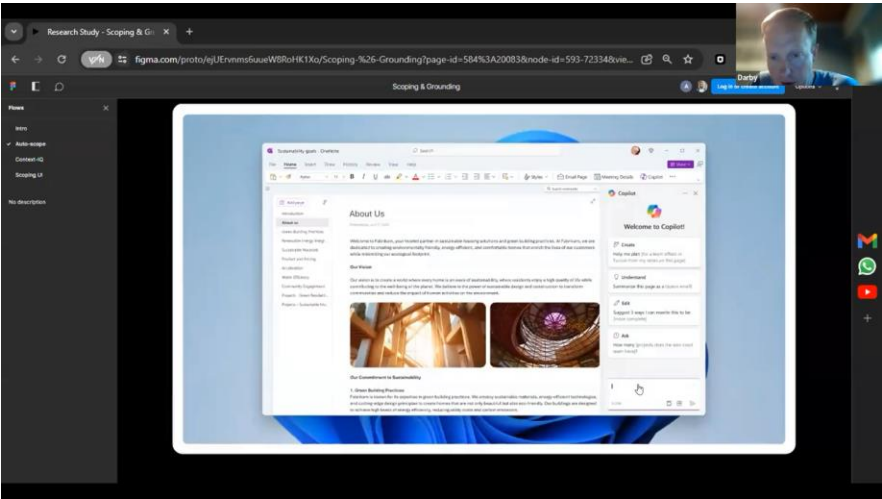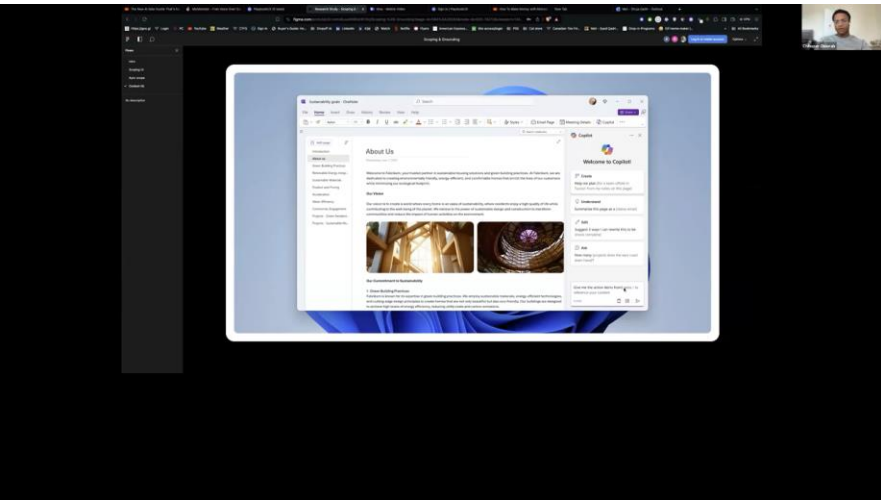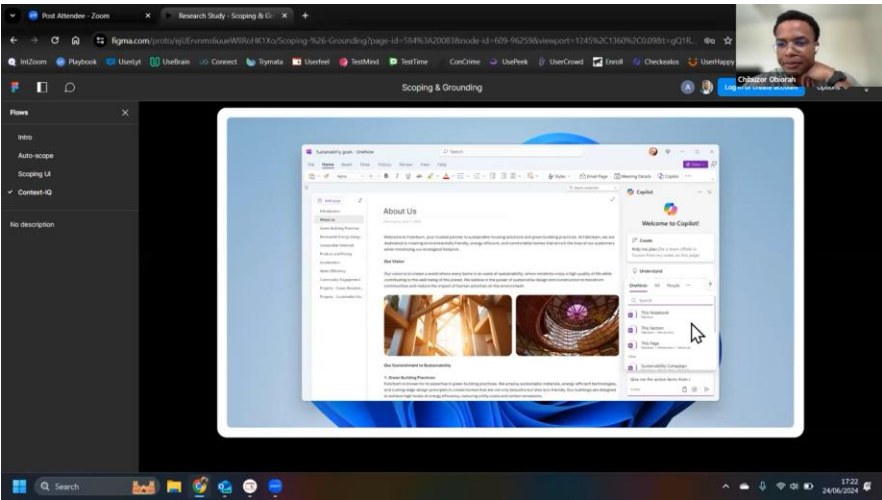
Recommendation

The other 20%...

- Preferred Auto-scoping as they said the other prototypes required more steps. Users liked the idea of just writing a prompt and Copilot automatically generating an answer based on their prompt

- However, users also struggled to draft a prompt in the Copilot pane

Scoping UI fills the gap

- Prompting is a challenge when users interact with LLM chat interfaces. Scoping adds another layer of complexity to prompting in our product

- Users want Copilot to automatically scope to reference the right information in our product, but because of the uncertainty, we need to guide users by providing clarity in that journey to help them have some certainty.

- **Recommendation: Have a mixture of both Auto-scoping and Scoping UI.** Auto-scoping helps users save a step wherein Copilot understands their natural language. Scoping UI brings clarity to the prompting process.

Microsoft

General Copilot in OneNote Takeaways

💻 [Copilot in OneNote] saved users the trouble of switching between platform

📝 "It's a secondary assistant to some degree" | Users felt Copilot saved time throughout various tasks

🕰️ Latency continues to be a top challenge when using Copilot in OneNote

🪄 "The answer is only as good as the information I input" | Users are eager to learn stronger prompt generation

Microsoft