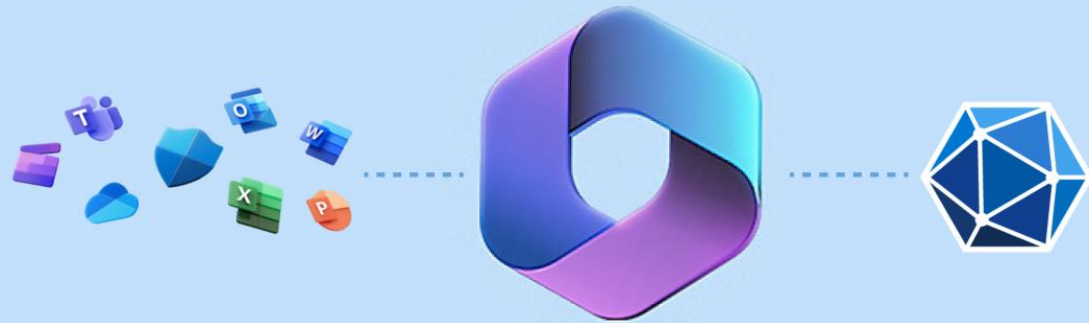


Microsoft 365 Copilot



Microsoft 365 Copilot

Use your AI assistant in Microsoft 365

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Let AI help you create, summarize, and analyze your documents, messages, and data. Copilot, Microsoft's AI assistant is now available in Microsoft 365 applications, including Word, Excel, and Teams as an optional add-on from Microsoft 365 business and enterprise subscribers. I'm Nick Brazzi, and I'd like to introduce you to generating drafts, analyzing spreadsheet data, creating presentations, and more, using natural language requests. Telling Copilot what you want is like having a chat conversation with a real person. Copilot can also summarize or answer direct questions about chat conversations, online meetings, and email threads. A quick introduction is all it takes to get started with Microsoft's AI assistant.

An overview of Copilot

An overview of Copilot

Let's take a moment to clarify what Copilot is what is capable of doing, and what you need to work with it in Microsoft 365 applications. Copilot is a set of generative AI tools that you can use inside of mini Microsoft applications. To allow you to ask questions or give natural prompts, Copilot uses language models which are capable of parsing text to translate your own words about what you're looking for. And it is connected with the Microsoft Graph, so we can use data in your calendar, emails, chats, documents, and more to give you personalized responses. And of course, this is all protected by the standard privacy features in Microsoft 365. Microsoft offers different tools in the Copilot branding. This course introduces the Copilot tools for Microsoft 365 applications like Word, PowerPoint, and Outlook. Users in an organization with a Microsoft 365 Enterprise E3 or E5 subscription, or a Business Standard, or Business Premium subscription can use Microsoft 365 Copilot if their organization purchases it. Copilot licenses are set up and assigned by the Microsoft Administrator for your employer or similar organization. And if you are an administrator for your organization and are interested in learning more about getting ready for Copilot, you should take a look at this website. Next, some Copilot features require that your files are stored on one of Microsoft's online storage tools. In those cases, you can use files that you have shared on Teams, or files stored on OneDrive, or SharePoint. So for example, Copilot in Excel does not work for files stored on your computer storage drive, but it does work with files stored on OneDrive, SharePoint, or Teams. Copilot in Word on the other hand, does work with files stored on your computer. But if you want to ask Copilot to reference information from other files, those referenced files must be stored online. If you're not familiar with OneDrive or SharePoint, we have plenty of courses on LinkedIn Learning where you can learn more. And finally, remember, this is a First Look course. Don't be surprised if some things work a little differently for you. We expect that new features and changes will roll out over time. Most of the features in this course work in the office applications on Windows, Mac, and even the online apps that you can use on the Office 365 website. We'll mostly see these tools in Windows on this course. So there may be a little setup required by your organization's Microsoft Administrator, but now that we understand that, we can jump in and see what you can do with Copilot in Microsoft 365.

Generate drafts or modify existing documents in Word

Generate drafts or modify existing documents in Word

In this video, we will see two main ways to work with Copilot in Microsoft Word. With the document open, make sure the Home ribbon is active. Then look for the Copilot button in the ribbon. When you click that, it opens a panel where you can start a conversation with Copilot to get information about your document. You'll see some suggested prompts. Asking for a summary is a great option, or you can click the chat field below and write in a more detailed request. Or if you have a microphone connected to your computer, you could click this microphone button and ask with your voice. So I'll do that and I'll ask a specific question about this document. Do any of the Globe Bank executives have prior experience with other financial institutions? Then you can click that microphone button again when you're finished and click the send button to ask for those results. It'll take a moment to generate, and here it is. So instead of reading the entire document to find this information, Copilot was able to find it for me. And in the results, there is a Copy button, so you can copy this text and paste it somewhere else. Copilot will respond to lots of different prompts and questions, so I encourage you to experiment and try some ideas. As we learn more about Copilot, you'll be able to use a panel, like this, in Excel, PowerPoint and other applications. But here in Word, there is another way to work with Copilot. So I'll click the X here to close this panel, and I'm going to select some text on this page. With that text selected, a Copilot button appears to the left, and that will give you options for Copilot to rewrite the selected content to change the tone. Now, when you click this button, it may give you a few options based on the type of information you have selected, but most of the time, when you click this button, it will simply offer a rewritten version of that text. So this draft basically says the same thing, but rewritten with a different tone. And there are three options. I can click these arrows at the top to see those different options, or you can click this settings button down at the bottom to choose which tone you want for the rewrite. So I'll choose Casual, then click Regenerate, and if you do get a rewrite that you like, you can click the Replace button to replace your original text with the rewritten text. Or if you want both, you can choose this option to Insert the rewritten text below. Or if you don't want to use this at all, you can just click outside of the panel to close it. Next, I'm going to scroll all the way down to the bottom of this document, and I'm going to click on an empty line. When my text cursor is in an empty line, I see that Copilot button to the left. And if you click that button on an empty line, it opens a panel that can help you write a draft. You can use that here in a blank line in an existing document. Or if you start a new Blank document, you'll see that panel opens automatically on a Blank document. Of course, you could close this panel, but if you click on an empty line, you'll see that Copilot button to the left, and you can click that to open it again. So let's use this to write a draft. Of course, you can use natural language to write whatever request you have, and the draft will be better if you provide more information. (computer keys clicking) After typing in your request, you could just click the Generate button. Of course, Copilot will use information that it finds online to generate this draft, but I'm asking for information about a company called KinetEco, one of the clients I work with. It may not be able to find the relevant information on the web, but Copilot also has the ability to search for information in your Microsoft 365 account and your organization, including email messages, meetings, or documents you have stored on OneDrive or SharePoint. This information is known as the Microsoft Graph, and it is protected by all of the standard security features in Microsoft 365. But there also is the option to refer Copilot to a specific document that has this information. So before you click Generate, you could Reference a file. You could click the Reference a file button here, or you could type the slash key and start typing in the name of a file. And based on what I typed, it found a PowerPoint presentation on my OneDrive. I could select that and you can reference as many as three files in each request. But for now, I'm not going to Reference a file. I'll just delete this and we're going to see what it finds in my Microsoft Graph. So I've written my prompt and I'll click Generate and I'll give it some time to generate the results. And here is a draft based on information from my Microsoft 365 account. You can click the trashcan button in this panel if you don't want to use it. You can click Keep if you do want t

Analyze data in Excel

Analyze data in Excel

Selecting transcript lines in this section will navigate to timestamp in the video

Analyze data in Excel

Copilot can help with actions in Excel that can sometimes be tedious or confusing to use manually like sorting, filtering, analyzing data and more. Before we get started, Copilot for Excel will only work with files stored on one of Microsoft's online storage tools like OneDrive, SharePoint, or files shared on Teams. I'm using Excel on the Web, and this will also work in the Excel desktop application, but even then, you will need to open your Excel files from online storage, not your computer's local storage drive. With that in mind, I'm going to open a spreadsheet from my OneDrive. In Excel, you should make sure the home ribbon is active. And then on the right side, you should see the Copilot button. But before you click that, Copilot in Excel does require your data to be formatted as a table, but that's very easy to do. To simplify this, I'm going to delete the first five rows in this table. Then I'll click this button in the top left corner of my data to select the entire spreadsheet. Then in the home ribbon, I'll click format as table. You will need to choose a color style. It doesn't matter which one you choose. It will confirm the range of data that is selected. Then you can click OK and now my entire spreadsheet is formatted as a table and now I can click the co-pilot button in the home ribbon that opens this co-pilot panel. I can click Get Started and you'll see some suggested prompts at the top. These are great to get started and learn how Copilot works. But because this is an AI, you could also try to type other prompts in the chat field at the bottom. And you can also click this prompt guide button for other options. But let's start with something pretty simple. In the chat field I'll type sort by retail price and I'll point out that one of the columns in my spreadsheet is the suggested retail price and the AI should recognize that. So type in your prompt and you can hit the return key or click the send button and give it a moment. And now my entire table has been sorted according to the price in that column. It has the least expensive items at the top. Let's try a filter. This is a table with different solar power products. The different categories of products are in my first column and I only want to see solar panels. So in the chat field, I'll type filter to only show solar panels. Then hit the return key and give it a moment. And now it's only showing items that have solar panels listed in that category column. And it's still sorted by the retail price. So you can combine sorting and filtering. I'm going to reset that by going to the chat field and type clear the filter and hit the return key. Now the filter is gone. And if I wanted to sort it differently, I could ask Copilot to do that. But let's finish with something a little more complex. Let's ask it to analyze this data to show me the specific information that I need. So in the chat field I'll type, make a column chart showing the package quantity by target consumer. So the package quantity and target consumer are both columns in this table. I'll point out that this is a slightly more complex request but I'm still using natural language. This is going to make a pivot chart even though I'm not using that specific wording. You may have to experiment with different ways of phrasing your requests, but mostly you can type something like this, then press the return key. And after a moment, it shows me a preview of the chart. And if I like it, I can click this button that says Add to a new sheet, to add a new sheet to my document containing that pivot chart. And I can always click on this other sheet down at the bottom to switch back to my original table. And from here, I encourage you to experiment with your own prompts or try the suggested prompts to get an idea of what Excel Copilot can do.

Create and improve presentations in PowerPoint

Create and improve presentations in PowerPoint

In PowerPoint, Copilot can draft new slides or make improvements to existing presentations. From the welcome screen, I'll start a new blank presentation. You should make sure you're in the Home ribbon and you'll see the Copilot button on the right side of the Home ribbon. Click that to open the Copilot panel. Click get started, and from here you can type a request in the chat field at the bottom or you can try one of these suggested prompts. If you choose create a presentation, for example, it will put that in the chat field below but you'll still have to type in the rest of your request. You'll need to describe the presentation that you wanted to draft. Or another option is to start by providing a document that you already have. You could choose or type in, transform a file, that puts that into the chat field, but to finish the request, you have to put in a link to the file. It has to be a Word file, and you have to have it stored on OneDrive or SharePoint. Now, you could go to the OneDrive website, or in my case I have OneDrive set up on my computer so I can go to File Explorer and navigate to a folder that is stored inside of my linked OneDrive. From here, I can select a file. Then right click on that file, and if it is stored on OneDrive, you'll see the share option, select that, then click the button to copy the link. With that link copied, you can go back to PowerPoint, back to that chat field and use the keyboard shortcut, Control + V, to paste that link in. Then hit the return key or click the send button and give it some time to generate the draft. So that made a new presentation using the information from the Word document that I provided. As always, think of this as a starting point to give you ideas for your presentation. Even if the information is not quite right, the design or the layout may give you a good start. Copilot can also help you add individual slides. I want to add a slide after slide number three, so I'll select slide number three, then go to the Copilot panel, and I could type in or use a pre-made prompt that says, "Add a slide about," then finish typing in the rest of the request. So I want to add a slide about choosing a financial planner. I'll type that in, then hit the return key and after a moment, it generates that new slide. So take a look at the text to see if you can revise the draft for your needs. But even if the text is not right this is usually a great way to get a picture or layout for your slide. Now finally, I'm going to open another, much longer presentation that's already built so we can use Copilot to modify an existing presentation. With the presentation open, go to the Home ribbon, then click the Copilot button to open the Copilot panel and then click get started, and you may see a pre-made prompt for something like summarizing the presentation. If not, you can type that into the chat box. Or maybe you have a long presentation with lots of slides and you want to add some organization. So you may see that prompt, or you could type in "Organize this presentation." And when that's finished, you can look at your list of slides over on the left, and you'll see that they are now organized in sections. These sections are defined by the content in your slides and you can click the arrow next to each section to open or close it. So try these options or experiment with your own prompts to make new presentations or improve the presentations you already have.

Draft e-mail messages and summarize conversations in Outlook

raft e-mail messages and summarize conversations in Outlook

Copilot in Outlook can help you draft email messages or get summaries of messages you've received. Copilot works in Outlook for Windows, Outlook for Mac, and even Outlook on the web. However, for Windows users, Microsoft is rolling out a significant new version of Outlook in late 2023, and Copilot only works in that new version. So if you are a Windows user, you should take a look at the top right corner of the Outlook window to see if you have this switch to try the new version of Outlook early. Depending on when you're watching this video, you may already have the new version, or you may need to click this switch to get the preview of the new version. Or if you're using Outlook on the web or on a Mac, you can use Copilot without any extra setup. So first I'm going to select a message in my inbox. And above the message, we see the option to summarize it using Copilot. Now, this may not work on some very short messages. And it's really most useful when you have an ongoing conversation with several messages and replies like this one. So I'm going to go up to the top and click that option to get the summary. Give it a moment, and that's all you need to do. Instead of reading through all the messages and replies in this conversation, I can just read this summary and I will probably find the information I need. Next, I'm going to compose a new message. So I'll click the New Mail button up in the ribbon at the top. I'll just fill in who I'm going to send this message to. And I'll put in a subject line. Then I'll click on the body of the message. And from here, Copilot can save you time by writing a draft for your email message. When your cursor is in the body, you should find the Copilot icon in the toolbar above. And if you're working on Windows, you should make sure that the message ribbon is selected. So you can click that Copilot button, and from here you can write in your prompt. Remember, the more detail you give, the more effective the draft will be. Type in your prompt, then click Generate, and give it a moment. Take a look at the draft that it generates. If you need something different, you could click the Regenerate button. That's this circular arrow button. That will generate a new draft based on the same prompt. Or if you are using Outlook on Windows, there will be a control button just to the left of the Regenerate button. This will give you controls to change the tone or the length of the draft, or if you're using a Mac, those controls will be in menus over to the right side. But from here, I'm going to switch this to be more casual, and I'll change the length, then click Regenerate here. And after a moment, I see that modified draft. When you finally have a draft that you like, you can click the Keep button, or if you're working on a Mac, that button will say Insert. And that will place that text into the body of your email message. Now, you should always review and revise these drafts. In this case, it's listing requirements for a specific job. This is a well-known type of job, so Copilot can find information about it online. It will be based on general information, not on the specific needs for my organization. But I have a nice structure to the draft and some very useful information that I can use as a starting point.

Get summaries of meetings and chats in Teams

Get summaries of meetings and chats in Teams

In this video, we will see how to use Copilot in Microsoft Teams, both in chat conversations and in video meetings. And we'll start by going to the Chat section. So I'll click the Chat button in the sidebar on the left, and I'll select this chat conversation I've been having with Henry. In Chats, you can have direct text-based conversations with another person or a group of people. With this chat selected, I'll click the Copilot button near the top right, and we see something that's pretty important to see. I have not sent many messages with Henry, so there's just not enough content for Copilot to review in this conversation. However, if I select this conversation I've been having with Stewart, then click the copilot button near the top right, there's a much longer chat history with Stewart, so this will work here. And from here I could do something like get a summary of this conversation. I could type that prompt directly into the text field at the bottom, or I could keep it simple and just type in summarize, then hit the Return key or click the Send button. And after a moment, it gives me a brief point by point summary of my entire chat history with Stewart. Another useful thing is to ask a direct question about the content of this conversation. So we were talking about some print materials that needed to be shipped. So in the text field, I'll type in a question about that. Then hit the Return key or click the Send button, and it gives me an answer based on information it finds in that conversation. And it even includes a footnote. So I can click this number right here and it will scroll to the exact message where it found this information. Okay, so that's what you can do in a chat, but Copilot can also help you during a meeting. To see that, we'll go to the calendar section. So on the left, I'll click the Calendar button. Now I have this meeting here on my calendar, which I'm going to join in a minute. But first I want to start a different meeting just so we can see something important. So up at the top, I'll click Meet Now and I'll start a new meeting. Make sure that my camera and audio are working. And then I'll click Join Now. So when you are in a meeting, you should find this Copilot button up at the top. If you click that, it will ask you if you want to start the transcription. The meeting summary features offered by Copilot will depend on a transcription in the meeting. So before you can use any of these features, you have to start the transcription. But with that in mind, I'm not going to start it here. I'm just going to dismiss this and I'm going to leave this meeting, and instead I'm going to join this meeting which is already in progress. Some of my coworkers are already in this meeting, so I'll click Join Now. Oh, hello, everybody. So I've got a few of my coworkers here helping me out and I'm sorry to interrupt your meeting, but I want to show how to use the Copilot features. Now, before I do this, when you started this meeting, you clicked on the Copilot button and you started the transcription, correct? Okay, so now since I've joined the meeting, when I click on that Copilot button since the transcript is already running, it just opens that Copilot panel over on the right. And so now I can ask questions about this meeting, but this will only work if somebody has started the transcription and if more than five minutes have passed in that meeting, but now I can go into the Copilot panel and ask a question. So I'll just click on the text field here and type something in. What did I miss? And then hit the Return key or the Send button. And it will take a moment to look at the transcript so far and give me an answer to that question. And there we go. We can get a quick summary of what they talked about when I was not in the meeting. Let's ask a more specific question. Which new clients were discussed? Click the Return key or hit the Send button. It will look at the transcript and it will answer that question. Great. So if you come to a meeting late, this is a great unobtrusive way to get caught up. But remember, this only works if somebody started the transcription and the meeting has gone for over five minutes. So we've seen what we needed here. For now, I'm just going to close the Copilot panel, and thanks, everybody, for helping out. I'll see you later. Then I'll click the Leave button here to leave that meeting and close this panel. Now one more thing that Copilot can do is give you those same options to get summaries and ask questions after a meeting is over. So you can go back to your calendar later, double click on that Meeting. Then up at the top you'll see this tab labeled Recap. Now we're not able to see all of the information here because the meeting is still in progress, but when the meeting is over, we'll be able to look at the transcript and ask questions

Generate or modify content in Loop Workspaces

Generate or modify content in Loop Workspaces

Microsoft Loop is a web application for managing projects or organizing notes in a shared workspace. At the time of this recording, Loop is a new addition to Microsoft 365, so if you're not familiar with it, you can find my training course on Microsoft Loop on LinkedIn Learning. You can go to loop.microsoft.com and sign in with your Microsoft 365 account. Here I have three workspaces. Each is full of information that I can work on with different teammates. I can select one, and in this workspace, you see I have several pages, each containing different types of information. Now, a page in Microsoft Loop is built using blocks. Each piece of content is in a separate block, so this header line is a block. This paragraph is a block. This checklist, this table, all different types of blocks. And this lets you store and organize very different types of content mixed together on a page. Each block can easily be moved and even shared independently of the page, and, Copilot can be used inside of Microsoft Loop to either generate blocks that have drafts of new content or rewrite existing blocks. So in Loop, when you start an empty line, you can type the slash key, then choose the type of block you want to create. You might want to insert a table, a list, a date, or one of these other options. But if you have the Copilot add-on, you can choose one of these Copilot blocks. You can choose a block that summarizes all of the content on the page, or you can make a block to draft new content. I'll choose that, and for now, my Copilot field is right here on the page. If you need some inspiration or you don't know what to ask for, you can use one of these pre-made prompt suggestions, but I do know what I want to ask for, so I'll type that in, (keyboard clacking) then hit the return key or click the send button and give it a moment to generate. And it gave me the table I asked for. Remember, this should be treated as a draft. At the bottom, there's even a line that says, "AI-generated content may be incorrect," but this can be a great starting point. A lot of the upfront work is done, and now I can refine the information in this table. Up at the top there is this floating panel. So if you want to follow up with another request, you can put that in here. (keyboard clacking) Then hit the return key. After a moment, it added the column that I asked for and even filled it with some text based on information it found on this page. When you're finished, you can close that panel. Copilot can also be used to rewrite content on a page. I want to work with this paragraph, which of course is contained in a block. When you click somewhere on a block, a handle appears to the left of it. That's this button with six dots. You can actually drag that handle to move the block, or you can click it for this menu. And here you can choose, Rewrite with Copilot, it shows a floating panel where I can describe how I want this to be rewritten. You might want to describe some content that you want copilot to add. You might want it to find and replace specific words, or you might ask it to change the tone. For now, I'm just going to ask it to make this shorter, then hit the return key. After a moment, it gives me a shorter version of that text that basically says the same thing. And of course, you can still make manual changes to this content, so I could click here and type in a little text, (keyboard clacking) and make my changes. Now finally, any content block that has been generated or modified by the Copilot AI will have this Copilot button to the right of it. You can click that button to open the Copilot panel. And in this panel you can see the history of changes that were made. So I can see the change that the AI made and the manual change that I just made. And next to the most recent change, there is an undo button. And of course, you can use this text prompt to ask for more changes. I'll ask it to make this more formal. (keyboard clacking) And now I have that rewritten version. And when you're finished, you can just close this panel and you can always open it again later and ask the AI for more revisions.

Use Microsoft 365 Chat

Use Microsoft 365 Chat

We have seen many different ways Microsoft has integrated a Copilot assistant into other applications, but there is also a standalone AI chat tool called Microsoft 365 Chat. You can use it on the website or as an app inside of Teams. We'll see both, but we'll start on the website. So if you go to office.com and sign into your Microsoft 365 account, you should see a button from Microsoft 365 Chat in the sidebar on the left, or you could go to office.com/chat. The interface here may look familiar if you've used AI chat tools like ChatGPT. I'm really oversimplifying, but basically a system like ChatGPT is able to answer your questions using information from its own built-in resources combined with the information that it can find on the internet. Microsoft 365 Chat is a language model like that, but the information that it has available is your organization's Microsoft Graph. So it's able to find information about the people in your organization, documents stored on your company's OneDrive or SharePoint libraries, messages sent and meetings scheduled between your coworkers and more. I'll give you an example. In the chat field, I'll ask Which executives are mentioned in the, and then I'll type the slash key and I can refer to a specific document. I'll start typing in the name of the document. It finds a document on OneDrive that was shared with me, so I can select that. So I'm asking a question about a specific document, but you can also click this paperclip icon at the bottom and you can add other resources. Any information that you reference here will be used to find the information you're looking for. You can reference specific people in your organization, files that have been shared with you on OneDrive or SharePoint, recent meetings, or email messages. But for now, I have the question that I want to ask. So I'll click the Send button and give it a moment to generate the response. Now that I have the answer, I could continue this chat and ask follow-up information. I'd like to reach out to one of these people. I wonder if I've ever communicated with them over email before. So in the chat field, I'll type, Have I ever sent an email to any of them? And I'll hit the Return key and it found that I have emailed two of those people. And these little numbers in the response are footnotes that usually have links to some information related to the question. You can actually click on these links, and in this case, it would take me to the email messages that are being referred to here. Of course, the information you get from Microsoft 365 Chat is private information about your organization. That information is protected by the security features in Microsoft 365, and you can be assured Microsoft 365 Chat will only show information to you if you have security permissions to view that information traditionally in other Microsoft applications. And this will work much better for you when you ask questions about real people and real interactions in your organization. So you can use Microsoft 365 Chat on the website like this, or you can use it inside of Microsoft Teams. There's a system of small add-on apps that you can use in the Teams application. And Microsoft 365 Chat is one of them. On the sidebar on the left, you can click the Apps button and just search for Microsoft 365 Chat. Here it is in the search results. I'll click Open and it just starts a new chat conversation inside of Teams with Microsoft 365 Chat. So I'll ask my question here, When was the last time I had a meeting with, and then I want to reference a specific person. So I'll type the slash key, start typing in the person's name. It searches my company's directory and it found Stewart. And now I have my question. So I'll click the Send button and it gives me the answer. And this number one here is a footnote, which actually has a link to that meeting. So I could click on that and it takes me to the information page for that meeting where I can find the attendance report, or if the meeting had been recorded or if the transcript had been run, I could find those here as well. And of course, I can click on the Chat button in the sidebar on the left to go back to that chat conversation. So whether you use it on the Office website or inside of Microsoft Teams, this is a great tool to easily find information about your teammates, your documents, meetings, message history, and more.