Streamlining Your Work with Microsoft Copilot

Copilot

Your everyday AI companion

Chat as a productivity tool

Chat as a productivity tool
- As I'm thinking about my workday and building my task list, I think we could both get our work done much faster if we had each other to bounce our ideas around all day long. But once this video is over, we're on our own, or are we? Of course, I have a plan. I do plan on asking questions all day long, but it's going to be with my artificial assistant, Microsoft Copilot. Powered by OpenAI's ChatGPT 4, Copilot can give me up-to-the-minute answers on any question or dilemma, whether it's planning for a commute, shopping for office supplies, writing customer emails, even getting advice on dealing with coworkers. I'm Nick Brazzi, and in my LinkedIn learning course we'll have some fun learning how to chat with artificial intelligence like it's a real person on the other end of the keyboard.

Understand how chat AI works

- [Instructor] Part of being effective with chat artificial intelligence is knowing what's going on behind the scenes and how the concept of holding a conversation with a machine actually works. You may have heard of chat GPT. It stands for chat generative, pre-trained transformer. This is a tool developed and offered by OpenAI. Copilot is Microsoft's name for several AI tools, which were developed in partnership with OpenAI and use many of the same technologies as chat GPT. The most common way to work with Copilot is with the online chat assistant, and you can think of this as an advanced chat bot. If you've ever chatted with tech support or customer service on a website, you've probably used a chat bot without even realizing it. You state your problem in a chat window like this and it answers. You may type back some more refining statements to narrow the issue down. You don't have to restate the problem every time. You can think of it like chatting with a friend through text. There's existing context in that chat thread that you and your friend can follow through the conversation. And chat AI technology works the same way. You can ask it to solve your problem, answer your question, compose text for you, and we'll be going over all of this as we go through this course. I'll just ask Copilot a question here. When you ask a question or make a request, it's going to give you an initial result. That result may or may not be what you wanted. Maybe you need to refine the result. Maybe you need to scale the results or make the text more or less formal or confusing. So you can ask follow up questions. You can add more specific details. You can ask it for more context or provide more context. All of these things will help maximize the result in the shortest amount of time while you're chatting.

Access the Copilot chat assistant

Access the Copilot chat assistant

- [Presenter] The brand name Copilot is used for many different AI tools offered by Microsoft, but in this course, we are focusing on the copilot chat assistant. I want to show you a few ways to access and use the chat assistant, but before we do this, it's important to know that Microsoft's AI tools have changed many times since they were first introduced. Copilot was once called Bing Chat. It was very similar, but many features have changed and I think there's a good chance that some of the features you'll see in this course will change again, so don't be surprised if things look a little different when you use copilot. Now, probably the most common and easy way to use copilot is to go here, the copilot website, which is copilot.microsoft.com. Anybody can use copilot here, and up at the top, there is a sign in button. Now, you can use Copilot completely for free, even without signing in, but some features are a bit limited. There's a separate course on LinkedIn learning called What Is Copilot, and that course explains the different types of accounts and paid subscriptions that you can use and the different features they enable. For now, we do not have to sign into an account to see how copilot works. Using the chat field at the bottom, I can ask a question. I'll type, how is the weather in London? And hit the return key and Copilot gives me an answer. As we go through this course, we'll see more interesting and complex requests or questions you can ask, but of course, I can ask follow-up questions and keep the conversation going. Or you can click this new topic button to reset the conversation memory and start a new conversation. Now, this copilot chat site is a great place to start, but there are other places you can access copilot . For the moment, I'm going to navigate to a different webpage. Now, Microsoft Edge is the web browser that comes with Windows and can be installed on a Mac. If you use Microsoft Edge to browse the web, you'll see a copilot button in the top-right corner of the browser window that will open the Copilot panel. Now, this may look different for you if you sign into the Edge web browser with a Microsoft account. Then the type of account you're signed into may enable different features in copilot. But for now, I am not signed into an account, so we're seeing the most basic version of this. At the top, you'll see three tabs. The first one is chat, and that's where you can get started asking questions. To the right of that is the composed tab where you can ask copilot to compose drafts of text, which you can copy and paste and use in other places. We'll explore that later in the course. And if you go to the insights tab, this can give you information about the current webpage that you're looking at. But for now, I'll go back to the chat tab. If you scroll down a bit, you can choose the conversation style. This is going to give you different answers based on those styles. It defaults to the balanced style, which is an informative and friendly chat. The responses are reasonable and fast. You could choose a more creative chat, which is original and imaginative, or you can choose Precise, which gives factual, concise responses, prioritizing accuracy, and you can always play around with these at any time to see which one you prefer. And then finally, down at the bottom, there is the chat field where you can ask your question or make your request. But since we're using the Copilot tab in the Edge web browser, there are some additional features. For example, since I have a webpage open here, I could ask copilot questions about that webpage. I'll ask it to summarize this page, and it gives me that summary so I don't have to read the entire webpage. Finally, if you are using Windows, then you may find Copilot integrated into the Windows interface. Take a look at the task bar at the bottom of the screen. You may have the Copilot button here in the task bar. Now, this may not appear for some users. It will be added in a software update, so make sure you run your Windows updates and check again. When you click this button, it opens a copilot panel in the Windows interface. In addition to all of the normal chat features, you can also ask copilot for information about an application you're using or even ask it to control some features in Windows. In general, you should keep an eye out for the Copilot icon. Copilot tools are available in other applications. Often, it will give you another way to access the AI Chat assistant, but in other cases, it may give you access to other AI tools. In this course, we'll be focusing on the core AI chat tools, and we've seen the three most common places to access the chat assistant.

Answer questions with Copilot

- [Instructor] Let's see how we can streamline our work with Copilot. I'll work from the website, copilot.microsoft.com, but you can feel free to use the Copilot panel in Microsoft Edge or the Copilot tool that's integrated into Windows. Now in this first set of examples, I want to give you ways to use Copilot as a glorified search engine. Why scroll through pages of search results to find the right website to answer your question when Copilot can do all that work for you. So you can ask it a straight up factual question to help you during your workday. So in the chat field at the bottom, I'll ask my question. So maybe I'm planning a meeting, and here's my answer. Now at any time, I can click the New topic button to reset and start a brand new topic. This means the answer will not have any context to do with the last question that I asked. So let's start with something fresh. I might need to brush up on some accounting skills for an upcoming meeting. So I'll ask, what is the double entry system of accounting? And here's my answer. And I wanted to show you this example because sometimes you still don't understand exactly what it's telling you, and that's fine. You can ask Copilot to clarify it or tell it to you in a different way. Now below the response it says one of 10. This tells me that I can ask follow-up questions and it will remember the context of the conversation up to 10 responses. Now I'm not signed in to an account and that number will be different if you do sign in to an account. So the next thing that I type can be related to this answer. So I'll ask Copilot to explain this like I'm five years old. And that just makes it easier to understand. Now I could take it one step further and ask for a good starter book I could read to learn more about this. Now, at any time, you can click Stop Responding. If it's taking too long or if it's typed out an answer and you've gotten all you need from that answer, you can click Stop Responding and it's going to instantly stop so you can move on. Next, I'll click the New topic button to reset. And over the course of my day, there's some more things that I might want to know. I might want to ask my manager if we can get our employees together for a yearly event. My manager might need some good examples of why we should do this. So I want to be ready with some facts. So I'll ask this, what is beneficial about getting employees together for a yearly event? And I purposely spelled beneficial wrong because I wanted to show you that Copilot is smart enough to still recognize what you're asking even with spelling and grammar mistakes. So I'll hit the Return key, and here are some good ideas that I can bring to my boss. Let's try a few more. I'll ask it to give me some ideas for good thank you gifts for a client. Okay, it gave me some good ideas and even links to some products online. Now I'm on question two of 10, so I can ask it to give me some more ideas and continue the conversation. And here are those extra ideas. Now finally, I'll point out again that I am not signed in to an account here. But if you do sign in, even with a free account, you will see a list of recent activity on the right side. So you'll be able to see questions you've asked recently, and you can ask them again. Also, if you sign in to an account, then your conversation limit will be higher as well.

Summarize information with Copilot

Summarize information with Copilot

- [Presenter] Copilot is excellent at summarizing information. I'm going to give you some use cases on how you can use this in your day-to-day work life. And to start, let's imagine my manager has just asked me to buy a new printer for the office and they need it by the end of the day. I have not bought a printer in years and I don't know what's out there. I don't know what a good printer is, and I don't even know how much they cost. I'll have Copilot do the research for me. So in the chat field, I'll ask it to, (keyboard clanking) compare the top five small office printers with pros, cons, and price. And here's the response. It's done a lot of work for me. I'm going to ask it to organize that information in a table. (keyboard clanking) And this table is much easier to read and I could continue with other follow-up questions. I'll ask which of these are inkjet printers. Now, next, let's look at this article that was published online. In this example, I'm about to go into a meeting with a customer of ours, and I've just learned that they recently wrote an article and I'd like to be able to talk to them about it in a conversational way. I'm about to go into the meeting so I don't have enough time to read the entire article and absorb all of the data. If you're viewing a page like this in the Microsoft Edge web browser, you can click the Copilot button in the top right and in the chat field, I'll ask it to summarize this article, (keyboard clanking) and it gives me a summary, organized with bullet points. If I really don't have much time, I could follow-up and ask it to make that summary shorter. (keyboard clanking) So if you use the Copilot panel in Microsoft Edge, you can ask questions or get summaries of most things you can view on the web, and that even includes a document in Google Docs. Now I'm about to go into a meeting and I need to learn the contents of this document very quickly. So in the Copilot panel, I'll click the New Topic button to reset, and this time I'll change the conversation style to be more precise. I just want a straightforward answer and then I'll type, summarize this with bullet points (keyboard clanking) and let's see what it came up with. I can see all of the important information from this document without taking the time to read through the full thing. This is going to make it so much easier to get ready for everything I need to do today.

Compose text with Copilot

- [Instructor] Copilot can help you write or rewrite text by composing drafts for you. As you use these features, I strongly recommend you use the AI generated text only as drafts to give you ideas or help you get started. You should always rewrite and revise for your specific needs. Now I'm doing a guest speaking engagement for a company and they'd like me to give them a bio. I currently don't have one, so I'm going to use Copilot to compose one for me. Starting at copilot.microsoft.com, I can simply go to the chat field and ask it to compose something. (keyboard clicks) I'll hit the Return key and look at the draft that it gives me. Now, I could copy this text and paste it somewhere, but clearly there's information in this bio that is not completely accurate for me, but this is a good starting point. Of course, I can follow up and ask it for changes. I'll ask it to make this shorter and more friendly. And here's that new version. So you can do that here on the Copilot website. But if you use the Microsoft Edge web browser, the Copilot panel has more options for drafting text. So in the Edge web browser, I'll click the Copilot button in the top right. At the top, I have the Chat tab selected. I'll switch over to the Compose tab, and in the field at the top you can describe the draft that you want. For this example, I've been tasked with composing a letter to a customer about a late payment. So I'll type that description in here. Now, I don't need to write, create a draft or write this, I can just describe what I want here in this Composition panel. Then below that, there are options that I can set for this draft, I'll choose the professional tone. For format, I'll choose email, and for length, I'll set this to short. Then I'll click Generate draft, and it gives me that draft. Now this draft will have placeholder text that I would need to rewrite. And you can make changes directly in this field or you could click this Refresh button near the bottom right to generate a new draft with the same settings, or you could even scroll up and change any of these settings, then click the Generate draft button again. And once you have something you like, there is a copy button right here on this panel, so you could copy that and paste it somewhere else. Now for another example, I'm going to switch over to this document. Now this is a document, but I'm working on the Google Docs website, and I'd like to create a social media post about this. So since I'm making a request related to a webpage that's open, I want to do this here in the Chat tab. And I'll type in my request. So I can just ask it to create a social media post about this, and this refers to the webpage that's open. And it gives me a draft for that social media post. I could copy this and paste it anywhere I want, but let's ask it for a version that's more suitable for LinkedIn. And this format will be more appropriate for LinkedIn. So in the Chat tab, you can ask it to compose something related to a page or a document that's open in the web browser. But in the Compose tab, it will ignore the page that's open and will give you more specific tools for composition. Let's see one more example here in the Compose tab. This time I'm going to ask it for something related to one of our clients, a company that runs hotels. They're going to start a podcast about exploring hotels, so I want to come up with some good podcast titles. So in the text field at the top, I can just type in "Podcast titles about exploring hotels." I'll change the tone to funny, I'll change the format to ideas, and we can keep the length set to short, and I'll click Generate draft. Not only did it come up with some great titles, but it also included some taglines for me. So that's how you can use Copilot to also come up with ideas for you.

Solve problems with Copilot

- [Instructor] I'm ready to ask Copilot to help me solve some problems. Now, we've composed text, summarized data, and I've gotten some basic questions answered. But now let's see what else we can do with Copilot to account for other things that may come up in my day-to-day work life. I'm going to set the conversation style here to creative. And remember, if you provide more detail in your requests, Copilot will provide better results. The first thing I want to do is create a schedule for my day. It needs to allow time for me to answer emails, return phone calls, and I need to take a walk. So I'll ask it to create a workday with those details. And here it is, it's giving me a complete work schedule along with blocks of time and it's even given me a lunch break and allowed time for my walk. Now, next I need to ship a box of materials to a conference that my company is running. I need to ask Copilot what size box I should purchase from the postal service. So I'll click the New Topic button to reset, then ask my question. So I asked what size box I should purchase to ship 1,000 Post-It notes and it's giving me my answer. It shows dimensions of the available box types and how many stacks of Post-It notes I can fit in each one. And this is exactly what I was looking for. Next, I have been asked to purchase the ice cream for an office party. I'm not sure how much I should get, so I'll ask Copilot. And it gives me lots of information to help me decide what to buy. What about pizza? If I need to order pizza for all of these employees, I'm not sure what kinds of pizza I should order. And I wonder if I can ask that. So let's find out. And it's giving me some great information. I can also ask Copilot for some advice. In the workplace, difficult conversations can be a real challenge. Here's a light example. I have a coworker who's been taking my lunch out of the refrigerator. I'm not sure how to bring this up to the coworker. So let's see what Copilot has to offer by way of advice. And this gives me some good starting points. Now, in addition to dealing with HR issues, Copilot can also give you career advice. For example, we're thinking about partnering with another company to manufacture our product. I'm not an expert in this area and I'm not sure what the risks are, so I'm going to get it summed up by Copilot. I'll ask what are some risks when partnering with another company to manufacture our products? And it gives me some great information to consider. So these are some examples of how you can solve a variety of problems with Copilot Chat.

Use Copilot to create and analyze images

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- [Instructor] Copilot has the ability to both analyze images and create new images for you. Now, these features will only work if you are signed into an account. So in the top right corner you can see that I am signed in. Now, let's try some examples. You can upload an image and ask things like, where is this? You can have it analyze contents of an image. You can even have it look at a picture of a dog and ask Copilot what breed it is. So let's see this in action. In the chat field, I'll click the image button and I can upload a picture directly from this device or computer. There's also a button to upload from mobile if you want to upload something from your phone. But I'm going to choose a picture that I have here on this computer and it'll take a moment to upload it. But I still have to ask it something, so I'm not done yet. In this case, I'm going to ask where is this? And it identified this as Tower Bridge in London. Sometimes it will offer details on other things in the picture, and it may even offer a critical comment on it. You could ask follow-up questions, or you could use one of the suggested prompts that pop up here. So that's how you can use Copilot to analyze images. But Copilot can also create images for you. Copilot is able to use the DALL·E 3 AI image model, and you can even refine images instead of having to create them again from scratch if you don't like what was originally generated for you. Now, there are some guidelines. You cannot create images of public figures. You also cannot create images containing hateful content, or nudity, or violence, basically, it won't create anything that violates the Copilot terms of service and community guidelines. So why would you even need to create your own images? Well, let's take a look at a slide I'm working on in PowerPoint. This slide has information about printer models that we are retiring in my office. Sometimes it's hard to create an image or find an appropriate image for a slide. Now, PowerPoint has an excellent stock photo library, but sometimes you need something really specific. So I'll go back to Copilot and in the chat prompt, I'll ask it to create an image of a laser printer with an hourglass above it. That's really specific and I could have asked it to create an illustration, or create a drawing, or create a photorealistic computer generated image. All of those things would change the output of what I get. Also, you should note that these generated images will have an invisible watermark on them. This uses a feature called content credentials. The images have a digital invisible watermark labeling them as being created by AI with the time and date of creation. And this is based on specifications by the Coalition for Content. And here are the options that it offers me, a few pictures of a printer with an hourglass above it. Now could continue the conversation and ask for changes, but once you have a picture you like, you can click on it to see it larger. You can use the style buttons below the picture to try different styles. I'll try the Steampunk style. If you don't like the new version, you can click undo, but I'll click Looks good. Then above the picture, you can click the button with three dots to open this menu. And there's an option here to edit the picture in Microsoft Designer. That's Microsoft's online graphic design tool. So you could make more changes to the picture or add it to a larger design project. Or you can use this option to simply download the picture to your computer, or you can click this copy button. Then you can paste the picture somewhere else. So now that I've copied the picture, I can go back over to that PowerPoint slide. I'll click this space for an image and I'll click the paste button up in the ribbon and it pastes that right on my slide. And we can see the designer tools in PowerPoint open up on the right and offer some redesigns for this slide. So I could choose one of these, and here's our slide, and I think it looks pretty good. So that's how you can use the DALL·E 3 AI Image Generator in Copilot.

Know where AI data is coming from

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- [Instructor] Using chat data to figure out how much food to order for a party is a fairly low-risk activity. If the chat data is incorrect or outdated, the worst thing that could happen is you'll either have too little or too much food. But for riskier scenarios or scenarios involving legal or safety concerns, it's important to double-check Copilot's answers. Microsoft has partnered with OpenAI's ChatGPT. This means you're getting current, up-to-the-minute results with citations, so you know where that information is coming from. In most Copilot responses, you will see these small numbers. These are citations. They're links that take you to the website where it found this information. And you can hover your mouse cursor over the number to see a preview, or you could just click on it to go to that website. So you can check that site, make sure it's reliable, reputable, and make sure it's current. It's always worth remembering that these answers are coming from somewhere, and you should know where that is. Usually you'll also see links related to information below a response, like these. These will offer more resources if you want to do more research. And if you're happy with the answer, you can click this thumbs up button to like it. If you get the wrong answer or incorrect information, you can click the dislike button, and that's going to help train Copilot for future answers.

Disclose when using AI

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- [Narrator] Legislation is being put into place worldwide at a rapid pace about where and when you can use generative AI text, that is text that was composed by artificial intelligence. Some judges in the United States are making lawyers disclose when they've used AI to create legal documents, including contracts, like this one. This could mean putting a footnote into place, saying that portions of a document were created by Microsoft Copilot or any other AI tool that you might have used. If you're writing a book, copyright offices are currently working on policies for authors on who might be using AI to generate pros. If you're working on a contract, legal document or any text that may need to be copyrighted, be sure to check with your local agencies about any current legislation that might be in place for using text that was composed by Copilot or any artificial intelligence software.

Use Copilot Pro for individual subscribers

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- [Instructor] Previously in this course, I said that you can sign into an account when you use Copilot. Signing in with a free account enables a chat history and access to newer language models, but there are also subscriptions available that you can pay for to unlock even more features and security safeguards. In this video, I want to introduce Copilot Pro, an upgrade subscription available to individual users. When comparing Copilot Pro to the free version, the main upgrade is the ability to use Copilot tools inside of Microsoft 365 applications, including Word, Excel, PowerPoint, and Outlook. Using Copilot inside of those applications offers many of the same features we've seen in this course, but it also unlocks AI-enabled features designed specifically for creating documents, presentations, or spreadsheets. And in Outlook, the AI can give you summaries of your email communications or help you write drafts. There are other courses on LinkedIn Learning that show how to use Copilot within these Office applications. That's the main reason people buy the Copilot Pro subscription. However, if you are using the Copilot chat assistant that we've seen in this course, Copilot Pro will enable a faster experience. It unlocks access to newer language models even during peak times. And if you generate images and edit them in Microsoft Designer, it can accelerate those user experiences. Online tools like Microsoft Copilot require lots of processing power from remote server farms. These tools are expensive for Microsoft to manage. Using a free account with Copilot is a great way to get started with these tools. But if you use them often and need a faster user experience, Copilot Pro may help.

Stay up to date with what AI can do for you

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- [Instructor] Thanks for spending time with me as we got through our day, thanks to AI chat. There's much more you can learn about working with Copilot. You may want to take a look at my course on LinkedIn learning, called "What is Copilot? Get started with Microsoft's Everyday AI Companion." This course clarifies details about the different subscriptions and accounts you can use with Copilot, and the different features enabled by each one. If you want to learn more about where we're going with AI, take a look at Ian Barkin's course, "Introduction to Conversational AI." We also have a course called "Generative AI for Business Leaders," by Tomer Cohen. He covers all the angles, including risks and ethics. Or you might just want to go to LinkedIn Learning and search for Copilot, then go to this type menu and filter it to only show courses, and you'll find many more training courses on Copilot.