Introduction

In this module, you learn how to craft effective, contextual prompts for Microsoft 365 Copilot to **summarize** information in Microsoft 365 apps. If you're looking to enhance your prompting skills for Copilot, this module equips you with the knowledge and techniques to craft prompts that yield accurate and helpful results from Microsoft 365 Copilot.

The focus of this module is **simplifying, summarizing, understanding,** and **compiling** information using Copilot in Microsoft 365 apps such as **Word, PowerPoint, Teams, Outlook,** and others. You learn how to use these basic summarization capabilities, but also how to craft an efficient prompt that contains all the elements to generate the desired results.

Important

Many of the Copilot features covered in this module are only available to customers with a Microsoft 365 Copilot license or Copilot Pro license. However, the strategies employed to craft better prompts can be used with any chat-based large language model (LLM).

By the end of this module, you'll be able to:

1. Identify the key elements of an effective prompt and apply them to your own prompts.
2. Prompt Copilot to summarize or extract key information in Word documents, Excel tables, and PowerPoint presentations.
3. Summarize chats and meetings to look for key action items with Copilot in Teams.
4. Task Copilot in Outlook with summarizing emails to look for action items or mentions.
5. Compile information from multiple documents and generate a combined summary with Microsoft 365.

Throughout the module, you'll see examples of **simple** prompts that are improved with different techniques to be good prompts, then **better** prompts, and then the **best** version of those prompts. Dissecting prompts in this way helps you learn about the capabilities of Microsoft 365 Copilot and reinforces the importance of good technique at the same time. Completing this module provides you with skills to **enhanced productivity** by effectively communicating expectations to Copilot, saving time and effort. You'll also develop **improved prompting skills** to craft clear and concise prompts, enhancing productivity in Microsoft 365 apps.

Exercise - Follow along using sample data with Microsoft 365 Copilot

Throughout this module, we'll be crafting prompts for Microsoft 365 Copilot that reference the following files:

- [Market Analysis Report for Mystic Spice Premium Chai Tea.docx](#)
- [Contoso Chai Tea market trends 2023.xlsx](#)
- [Contoso Chai Tea market trends 2023.docx](#)
- [Market Trend Report- Protein shake.docx](#)
- [Mystic Spice Premium Chai Market Analysis Presentation.pptx](#)

Note: These are the files we'll reference throughout the module. For this lab, however, we'll start by uploading all files to OneDrive to ensure they're accessible for Copilot prompts later.
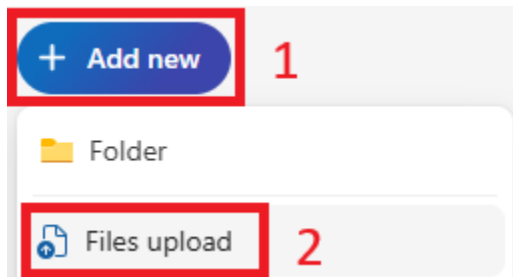
Uploading Files to OneDrive

Follow the steps below to upload all files needed to OneDrive:

1. Log into the laptop provided by your IT team.
2. In the Windows taskbar, select Microsoft Edge.
3. In the address bar, enter `https://onedrive.live.com/login`.
4. Under Welcome to Microsoft 365, select Sign in.
5. At the Sign-in prompt, enter `userx@defence.gov.sg` (username and tenant provided by your tenant provided) and select Next.
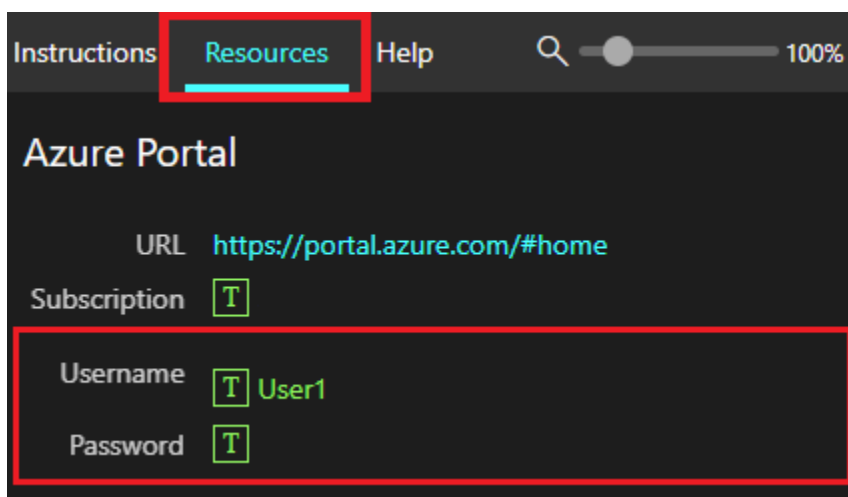
6. At the **Enter password** screen, enter the password (provided by MINDEF/SAF) for the User account, then select **Sign in**.
7. If prompted to **Stay signed in**, select **Don't show this again** and then **Yes**.

8. In **OneDrive**, in the top-left corner, select + (add new) > **File upload**.

9. In **File Explorer**, select **This PC** > **Local Disk (C:)** and open the **Resource Files** folder.
10. Select all files within th**e Resource Files** folder, then select **Open** to upload them to **OneDrive**.
11. When the upload is complete, you should see **Uploaded 29 items** to My files in the bottom centre of the screen.
12. Leave Edge open and move on to the next task.

Referencing files

When referencing files from Copilot, you might find that you can't find some files from the suggestions provided to you. This happens sometimes because certain experiences with Copilot only reference files from the Most Recently Used (MRU) list, while others let you browse OneDrive to find your file. Adding them to that list is as easy as opening them up in the appropriate Microsoft 365 app. Once they've been opened, they should appear in the MRU list.

Important:

Microsoft 365 Copilot will only work with files saved to OneDrive. If files are stored locally on your PC, you will need to move them to OneDrive to activate Copilot.
As you progress through the module, you'll have an opportunity to try out other prompts against these files, and are encouraged to do so to explore and enhance your prompting skills.

Simplify and extract key information with Copilot in Word

To start using Microsoft 365 Copilot in Word, you can open the Copilot pane by selecting the Copilot icon in the ribbon's Home tab.

This helpful feature provides answers to questions—broad or specific—about your document. Have a back-and-forth discussion to iterate and refine your results, get a summary or specific information about the document content, or ask it to generate ideas, tables, or lists that you can copy and insert into your document.
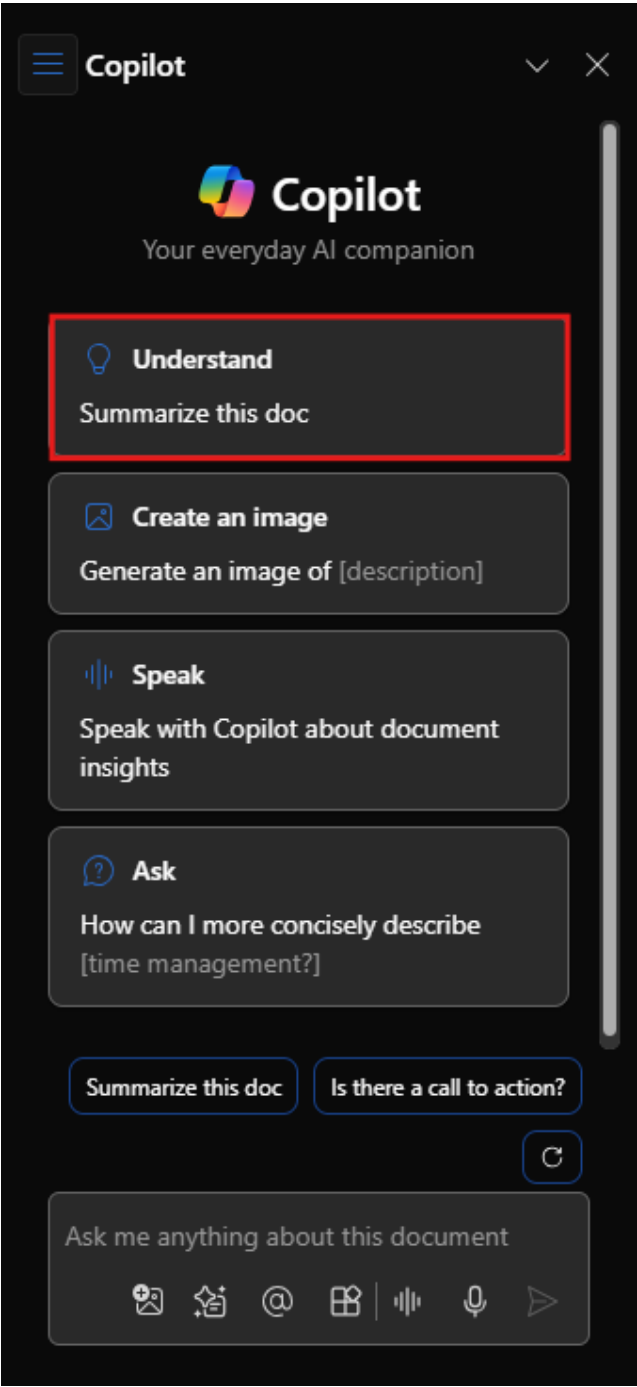
In the following example, we turn a basic prompt for Copilot in Word into a well-constructed, contextual prompt that gives you just what you need, in just the way you need it.

Let's get crafting

First, download *Market Analysis Report for Mystic Spice Premium Chai Tea.docx* and save the file to your **OneDrive** folder if you haven't yet done so.

Open the document in Word and then open the **Copilot** pane by selecting the Copilot icon in the ribbon's **Home tab**. Enter the prompts below and follow along.

Note:

Starting prompt:

Summarize this Word document.

In this simple prompt, you start with the basic **Goal**: *to summarize a Word document.* However, there's no information about why the document needs to be summarized or what the summary is needed for.

Element	Example Prompt
Basic prompt: Start with a **Goal**	**Summarize this Word document.**
Good prompt: Add **Context**	Adding **Context** can help Copilot understand the purpose of the summary and tailor the response accordingly. *"with a brief overview of the main points to discuss with my team during tomorrow's Sales meeting.*
Better prompt: Specify **Source(s)**	Adding **Sources** can help Copilot understand which document or part needs to be summarized and provide a more accurate response. *"...the section on Competitive Analysis..."*
Best prompt: Set clear **Expectations**	Lastly, adding **Expectations** can help Copilot understand how to format the summary and what level of detail is required. *"Please keep the summary to 5 key points and use simple language."*

Note:
Crafted prompt:

Summarize the section on Competitive Analysis in this Word document with a brief overview of the main points to discuss with my team during the tomorrow's Sales meeting. Please keep the summary to 5 key points and use simple language.

This prompt has all the details it needs - **Goal**, **Context**, **Source**, and **Expectations** - so Copilot can give you the answer you're looking for.

Explore more

Try out the final prompt we crafted, but using your own Word document. Customize the Context, Sources, and Expectations so that you get what you need from the document, without any extra stuff you don't.

What are some other ways you can think of to add context or sources or expectations to your prompt? Can you think of other prompting strategies you could use to generate the desired response?

Important:

This feature is available to customers with a Microsoft 365 Copilot license or Copilot Pro license. For more information, see [Welcome to Copilot in Word](#).
In the next unit, we'll look at how to craft similar prompts for Copilot in PowerPoint.

Identify key information and summarize with Copilot in PowerPoint

Microsoft 365 Copilot in PowerPoint is an AI-powered feature that can help you create, design, and format your slides. You can type in what you intend to convey with your presentation, and Copilot helps you get it done.

Copilot can help you move past that initial blank slide and get you moving in the right direction. To start using Copilot in PowerPoint, you can open the **Copilot** pane by selecting the Copilot icon in the ribbon's **Home** tab.
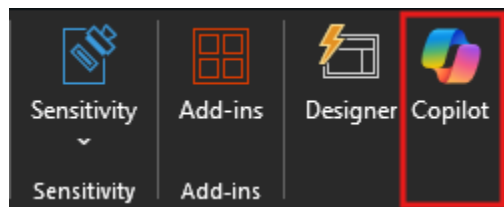
From the Copilot pane, you can ask to have the presentation summarized or ask questions about the content on the slides. In the following example, we start with a basic request to summarize the presentation and add other elements to make the prompt more robust.
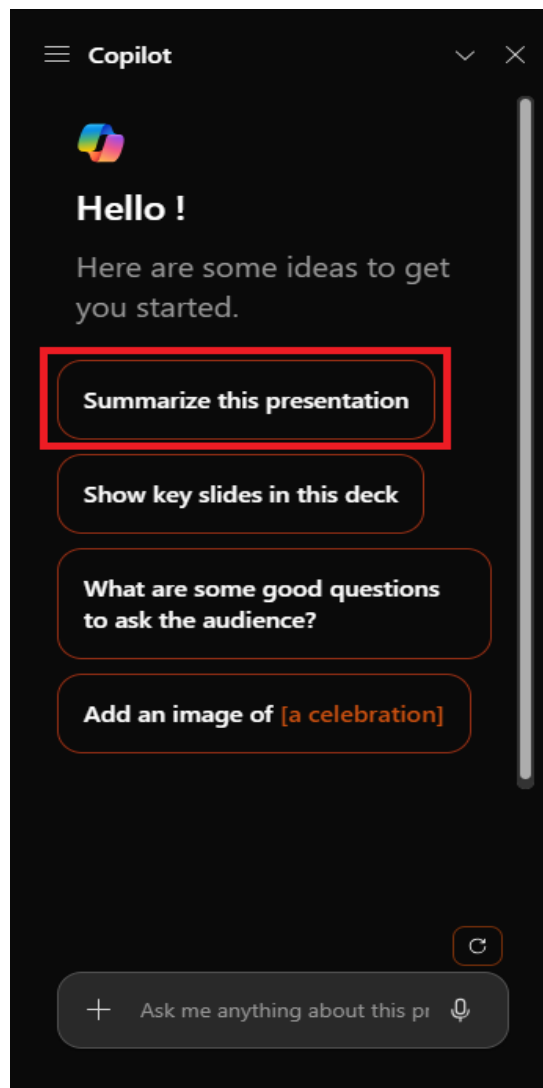
Let's get crafting

First, download *Mystic Spice Premium Chai Market Analysis Presentation.pptx* and save the file to your **OneDrive** folder if you haven't yet done so.

Summarize this PowerPoint presentation.

In this simple prompt, you start with the basic Goal: *to summarize a PowerPoint.* However, there's no information about why the presentation needs to be summarized or what the summary is needed for.

Element	Example
Basic prompt: Start with a **Goal**	**Summarize this PowerPoint presentation.**
Good prompt: Add **Context**	Adding **Context** can help Copilot understand the purpose of the summary and tailor the response accordingly. *"...for my boss that includes an overview of the main points before meeting with their client."*
Better prompt: Specify **Source(s)**	Adding **Sources** can help Copilot understand which presentation or part needs to be summarized and provide a more accurate response. *"...slides 5-10 in this PowerPoint presentation..."*
Best prompt: Set clear **Expectations**	Lastly, adding **Expectations** can help Copilot understand how to format the summary and what level of detail is required. *"Please format the main points as a bulleted list and use a professional tone."*

Summarize slides 5-10 in this PowerPoint presentation for my boss that includes an overview of the main points before meeting with their client. Please format the main points as a bulleted list and use a professional tone.

In this prompt, the **Goal**, **Context**, **Source**, and **Expectations** are all provided, giving Copilot enough direction to generate a response that meets your needs.

Explore more

Try out the final prompt we crafted, but using your own PowerPoint presentation. Customize the Context, Sources, and Expectations so that you get what you need from the presentation, without any extra stuff you don't.

Important:

This feature is available to customers with a Microsoft 365 Copilot license or Copilot Pro license. For more information, see [Welcome to Copilot in PowerPoint](#).

Spot trends and visualize data with Copilot in Excel

Microsoft 365 Copilot in Excel helps you do more with your data in Excel tables by generating formula column suggestions, showing insights in charts and Pivot Tables, and highlighting interesting portions of data.

In Excel, select **Copilot** on the ribbon to open the chat pane.
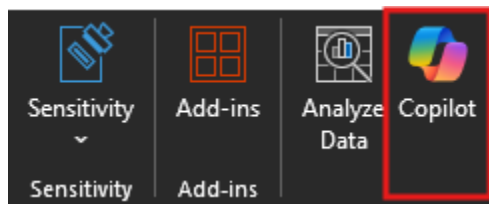
To use Copilot in Excel, your data will need to be formatted in one of the following ways:

- As an Excel Table
- As a support Range

You can create a table, or you can convert a range of cells into a table if you have a data range by following these steps:

1. Select the cell or the range in the data.
2. Select **Home** > **Format as Table**.
3. In th**e Format as Table** dialog box, select the checkbox next to **My table has headers** if you want the first row of the range to be the header row.
4. Select **OK**.

If you prefer to keep your data in a range and not convert it to a table, it will need to meet all of the following requirements:

- Only one header row
- Headers are only on columns, not on rows
- Headers are unique; no duplicate headers
- No blank headers
- Data is formatted in a consistent way
- No subtotals
- No empty rows or columns
- No merged cells

In the following example, we begin with a basic request to analyze a table and progressively add elements to make the prompt more robust.
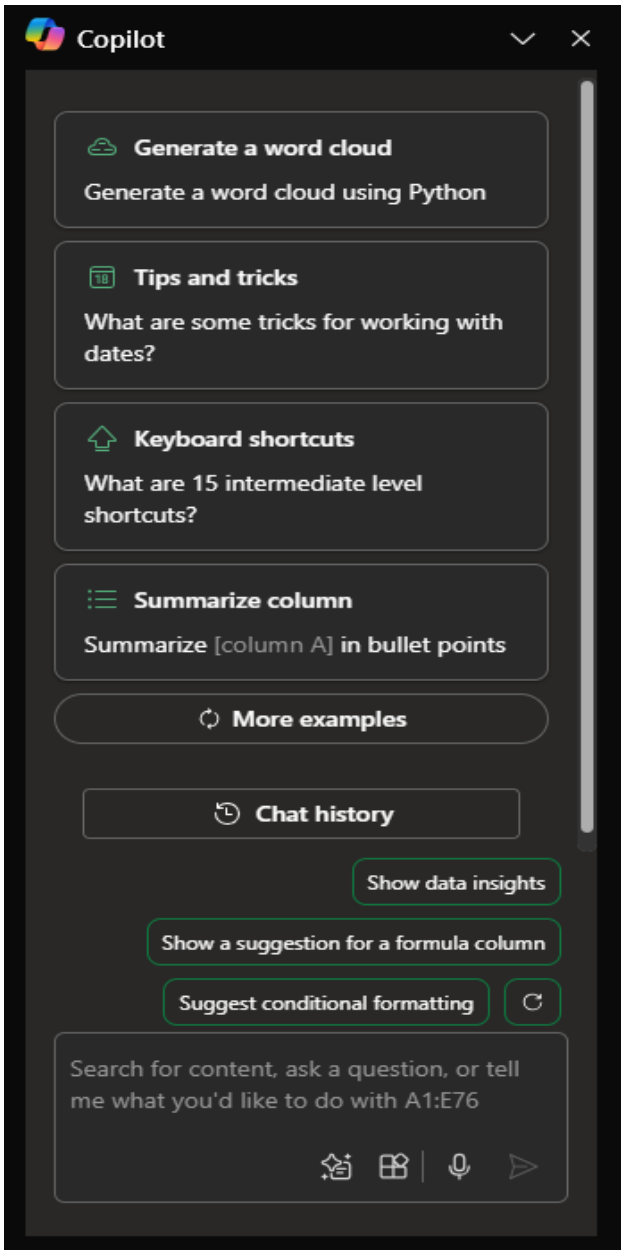
Let's get crafting

First, download *Contoso Chai Tea market trends 2023.xlsx* and save the file to your **OneDrive folder** if you haven't yet done so.
Open the spreadsheet in Excel and then open the Copilot pane by selecting the **Copilot** icon in the ribbon's **Home tab**. Enter the prompts below and follow along.

Note:
Starting prompt:

Analyze this table in Excel.

In this simple prompt, you start with the basic Goal: *to analyze an Excel table.* However, there's no information about why the table needs to be summarized or what the summary is needed for.

Element	Example
Basic prompt: Start with a **Goal**	**Analyze this table in Excel.**
Good prompt: Add **Context**	Adding **Context** can help Copilot understand the purpose of the analysis and adjust the response accordingly. *"We're looking for the top-selling products from May through August for artisanal chai sales or premade chai sales."*
Better prompt: Specify **Source(s)**	Adding **Sources** can help Copilot narrow down the scope by telling it to use specific information or ranges. *"...from May through August for artisanal chai sales or premade chai sales...."*
Best prompt: Set clear **Expectations**	Lastly, adding **Expectations** can help Copilot understand how to format the summary and what level of detail is required. *"Please summarize the top-selling product for each month."*

Note:

Crafted prompt:

Analyze this table in Excel. We're looking for the top selling products from May through August for artisanal chai sales or premade chai sales. Please summarize the top selling product for each month.

This prompt gives Copilot everything it needs to come up with a good answer, including the **Goal, Context, Source,** and **Expectations.**

Explore more

Try out the final crafted prompt and others with your own Excel table. Here are some suggestions for prompts you might want to try. Copy them and add **Context, Sources,** and **Expectations.**

- Plot sales by category over time.
- Show total sales for each product.
- Show the total of advertising sales for each region last year.

Important:

This feature is available to customers with a Microsoft 365 Copilot license or Copilot Pro license. To learn more about Excel tables and how to create them, see [Create a table in Excel](#).

# Highlight key decisions and actions from 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 was missed, and pinpoint key people of interest in chat threads you were added to. All without breaking the flow of discussion. Copilot is available in the following meetings and calls:

- One-on-one and group calls
- Single meetings or scheduled private meetings
- Instances or occurrences of meetings in a series
- Channel meetings
- Meet Now

Copilot in Teams uses your Teams chat and meeting content to generate insights and actionable suggestions alongside your most important Teams touch points. Copilot in Teams is contextual to whatever it is that you're doing. For example, you can access the Copilot pane in a chat, meeting, or call, as long as a few conditions are met:

- Transcription or recording is turned on. The meeting organizer can configure the meeting so Copilot works without transcription prior to the meeting.
- The meeting or call is long enough for Copilot to analyze. If there isn't enough transcribed speech in the meeting yet, Copilot states that it needs more information before responding to prompts.

During a meeting or call, select Copilot from the meeting controls. If transcription isn't already turned on, you'll be asked to turn it on.
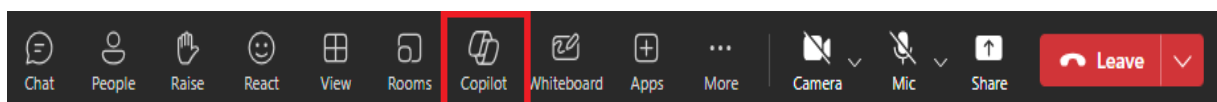
Copilot appears in a panel on the right side of the meeting window. Once the meeting is over, select the meeting in your **Teams Calendar**. From there, select the Recap tab in your meeting details. You can also access the Copilot panel from the meeting recap to ask questions about the meeting.
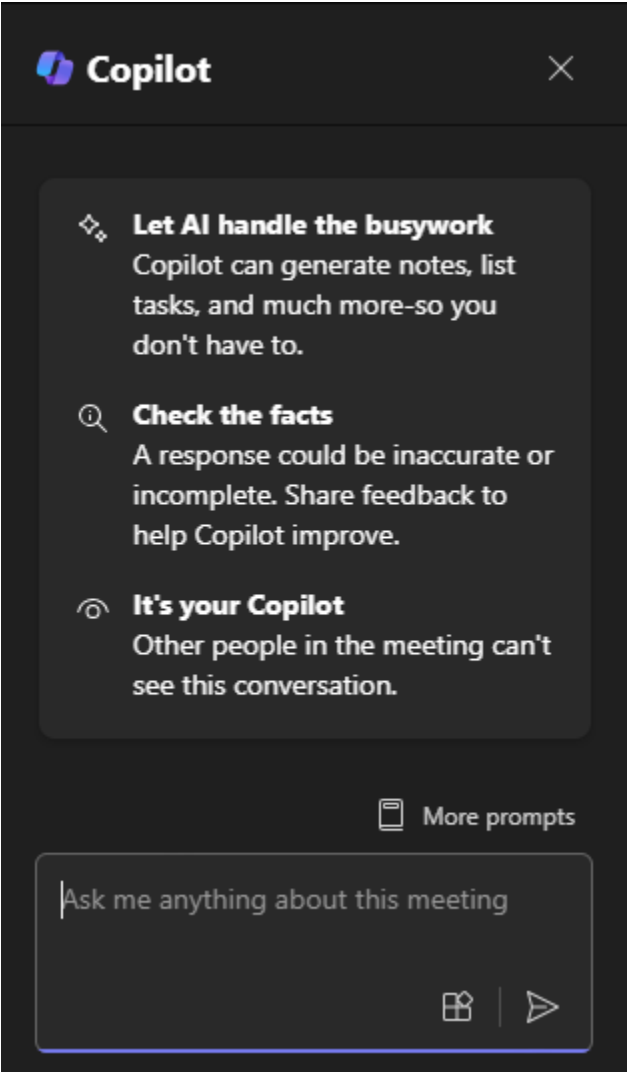
Let's get crafting

Note:

Starting prompt:

Recap this Teams meeting.

In this simple prompt, you start with the basic Goal: *to recap a Teams meeting.* However, there's no information about why the meeting needs to be summarized or what the summary is needed for.

Element	Example
Basic prompt: Start with a **Goal**	**Recap this Teams meeting.**
Good prompt: Add **Context**	Adding **Context** can help Copilot understand the purpose and adjust the response accordingly. *"I was late to attend and need a brief overview of the project timeline."*
Better prompt: Specify **Source(s)**	Adding **Sources** can help Copilot understand which part needs to be summarized and provide a more accurate response. *"Did Adele Vance propose any changes?"*
Best prompt: Set clear **Expectations**	Lastly, adding **Expectations** can help Copilot understand how to format the summary and what level of detail is required. *"Include the project timeline in a table and any proposed changes from Adele."*

Note:

Crafted prompt:

Recap this Teams meeting. I was late to attend and need a brief overview of the project timeline. Did Adele Vance propose any changes? Include the project timeline in a table and any proposed changes from Adele.

In this prompt, the **Goal**, **Context**, **Source**, and **Expectations** are all provided, giving Copilot enough direction to generate a response that meets your needs.

Explore more

When you first open **Copilot in Teams**, you're given some tips for using Copilot and suggested prompts to get you started. Use Copilot to:
- List out key points from [a file]
- Recap your last meeting
- Summarize unread emails from [this person]

Important:

Copilot in Teams is available on Windows, Mac, web, Android, and iOS. You must have a Microsoft 365 and a Microsoft 365 Copilot license in order to access Copilot in Teams. For more scenarios on how to use Copilot in Teams meetings, see [Get started with Copilot in Microsoft Teams meetings](#).

Catch up and prepare for the week with Copilot in Outlook

Copilot in Outlook makes inbox management easier with AI-powered assistance to help you write emails quickly and turn long email threads into short summaries. It combines the power of large language models (LLMs) with Outlook data to help you stay productive in the workplace. It can summarize email threads (also known as conversations), pulling out key points from multiple messages.

When Summary by Copilot is selected within the context of an email, Copilot automatically provides a summary based on the thread. Common use cases are summarizing a long email to see what decisions have been made and what actions have been suggested by others on the thread.
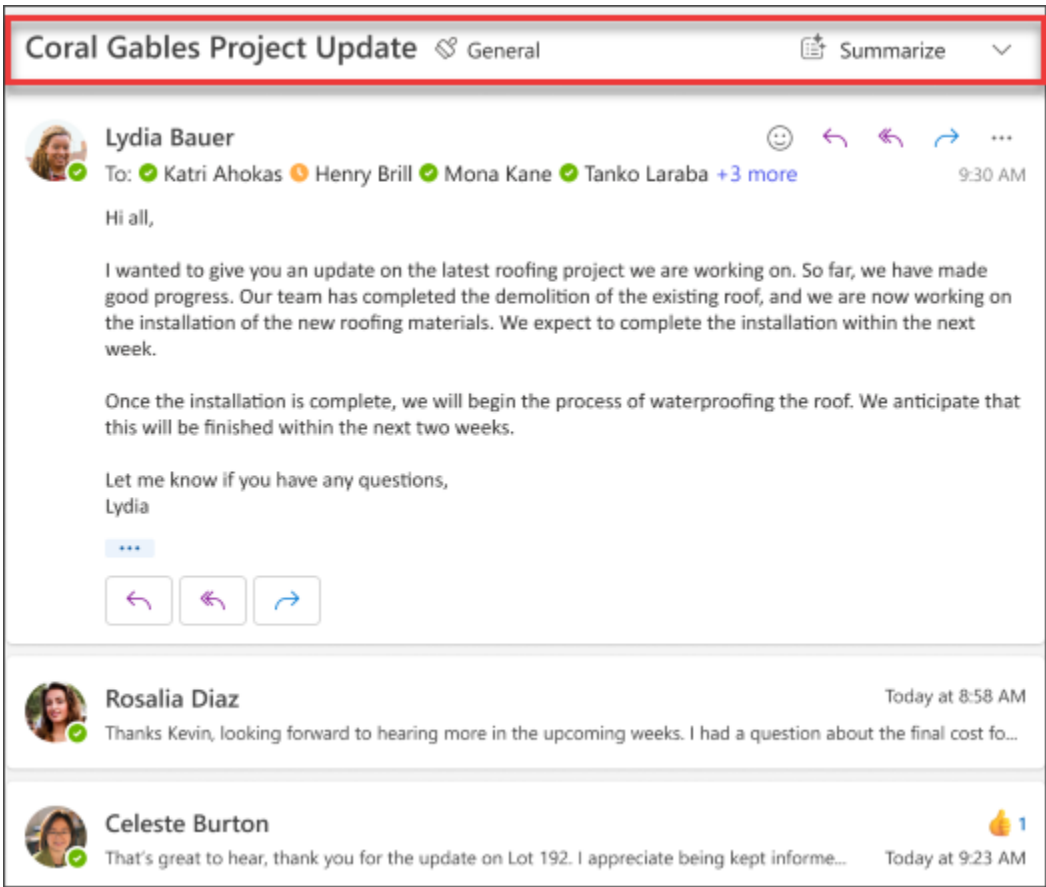
Once completed, the summary appears at the top of the email and will also include numbered citations that, when selected, takes you to the corresponding email in the thread.
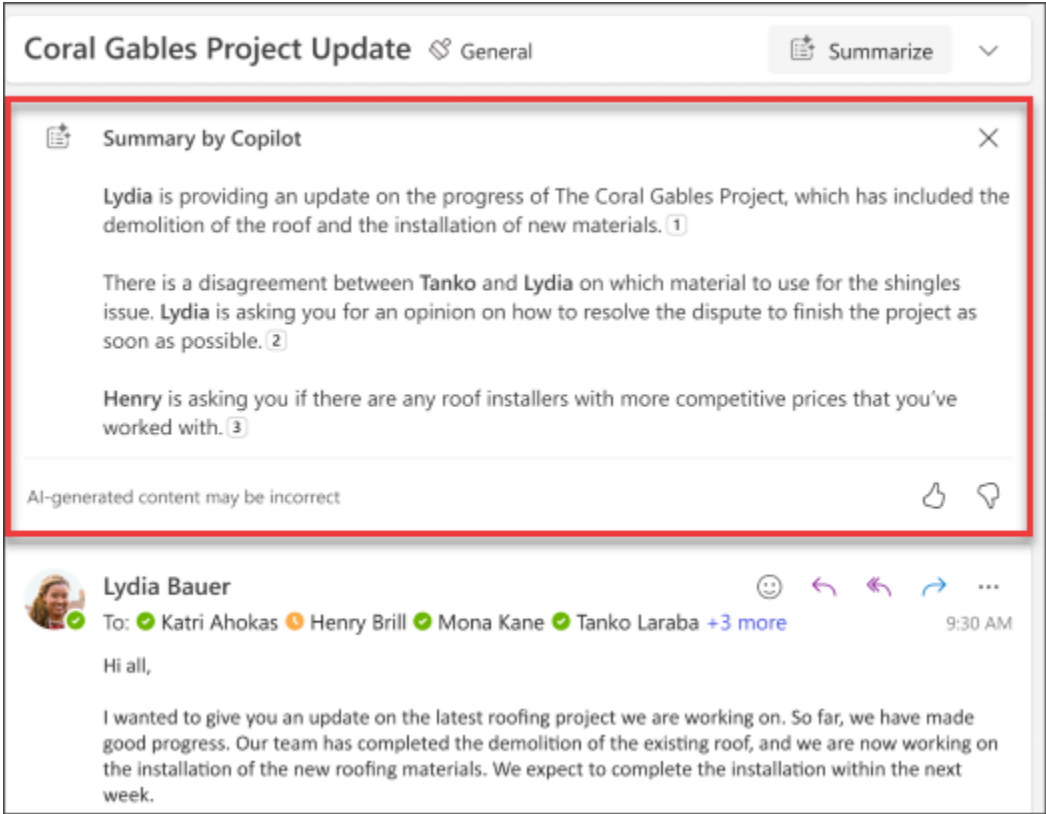
Let's get crafting

Instead of using the basic summarize feature, open the Copilot pane in Outlook from the toolbar and follow the prompts. However, the specific circumstances of your email will vary, you will need to adapt the prompt to your situation.

Note:
Starting prompt:

Summarize this email conversation.

In this simple prompt, you start with the basic **Goal**: *to summarize an email conversation.* However, there's no information about why you need the summary or what you're looking for.

Element	Example
Basic prompt: Start with a **Goal**	**Summarize this email conversation.**

Good prompt: Add **Context**	Adding **Context** can help Copilot understand the purpose and adjust the response accordingly. *"I need a brief overview of the action items assigned to me..."*
Better prompt: Specify **Source(s)**	Adding **Sources** can help Copilot understand which part needs to be summarized and provide a more accurate response. *"...from the project plan that was sent on Thursday."*
Best prompt: Set clear **Expectations**	Lastly, adding **Expectation**s can help Copilot understand how to format the summary and what level of detail is required. *"Create a table containing all of the action items and assigned owners and highlight the items assigned to me."*

Note:

Crafted prompt:

Summarize this email conversation. I need a brief overview of the action items assigned to me from the project plan that was sent on Thursday. Create a table containing all of the action items and assigned owners and highlight the items assigned to me.

In this prompt, Copilot has all the information it needs to give you a solid answer, **Goal**, **Context**, **Source**, and **Expectations** in this prompt.

Important:

Copilot in Outlook only supports work or school accounts, and Microsoft accounts using outlook.com, hotmail.com, live.com, and msn.com email addresses at this time. Any Microsoft account using an account from a third-party email provider, such as a Gmail, Yahoo, or iCloud, can still use Outlook, but won't have access to the Copilot features in Outlook. For more information, see Summarize an email thread with Copilot in Outlook

Summarize information on a topic with Microsoft 365 Copilot Chat

Microsoft 365 Copilot Chat (Copilot Chat) combines the power of artificial intelligence (AI) with your work data and apps to help you unleash creativity, unlock productivity, and uplevel skills. It works across multiple apps and content, giving you the power of AI together with your secure work data. Its ability to synthesize information and create things from multiple sources at once empowers you to tackle broader goals and objectives.

To compare, Copilot in the different Microsoft 365 apps (such as Word or PowerPoint) is specifically orchestrated to help you **within that one app**. For example, Copilot in Word is designed to help you better draft, edit, and consume content. In PowerPoint, it's there to help you create better presentations. But with Copilot Chat, we can pull that all together into a new experience.

You can access Copilot Chat in several ways:
- Use Copilot Chat in desktop and mobile versions of Microsoft Teams. See Use Copilot Chat in Teams.
- Access Copilot Chat at Microsoft365.com/copilot. See Use Copilot Chat at Microsoft.com/Copilot.
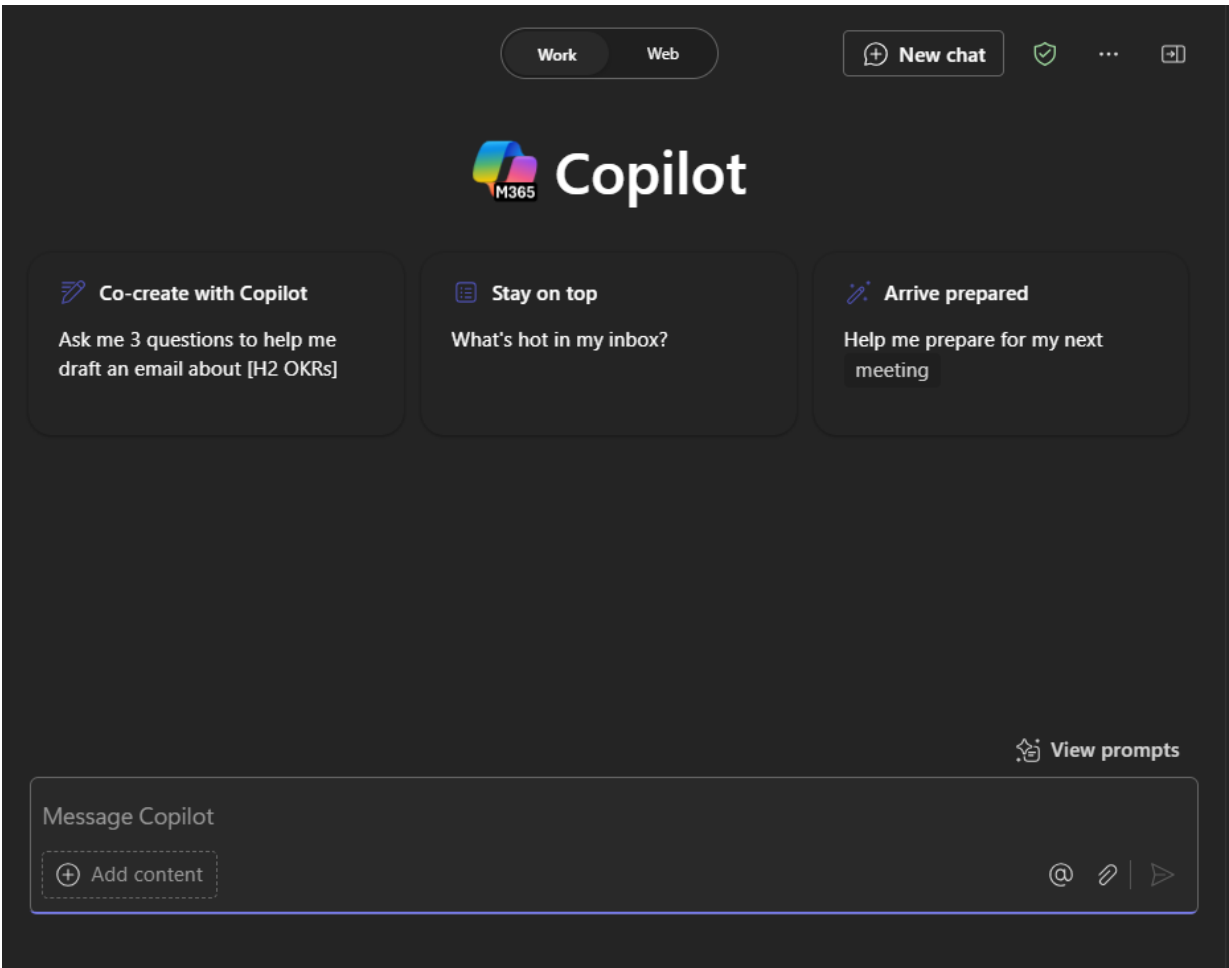
Let's get crafting

First, download and save the following files to your OneDrive folder and add them to your MRU list:

- [Contoso Chai Tea market trends 2023.xlsx](#)
- [Contoso Chai Tea market trends 2023.docx](#)
- [Market Trend Report- Protein shake.docx](#)

Open Copilot Chat in Microsoft Teams and follow along with the prompts that reference the files above.

Note:

Starting prompt:

Find and compile information on Contoso's new Protein Plus shake.

In this simple prompt, you start with the basic **Goal**: *to summarize information about a new product.* However, there's no information about why you need the summary or what you're looking for.

Element	Example
Basic prompt: Start with a **Goal**	**Find and compile information on Contoso's new Protein Plus shake**.
Good prompt: Add **Context**	Adding **Context** can help Copilot understand the purpose and adjust the response accordingly. *"...for an upcoming quarterly business review. We need an executive summary, as well as details on the social media campaign and competing products."*
Better prompt: Specify **Source(s)**	Adding Sources can help Copilot understand where to look for information and provide a more accurate response. *"Look for information in /**Market Analysis Report for Mystic Spice Premium Chai Tea.docx, /Contoso Chai Tea market trends 2023.xlsx**, and /**Market Trend Report - Protein shake.docx** to write the executive summary."*

Best prompt: Set clear **Expectations**	Lastly, adding **Expectations** can help Copilot understand how to format the summary and what level of detail is required. *"The summary should sound professional, with a hopeful tone about our release blockers. The competitive analysis should also include links to the relevant products in a table."*

Note:

Crafted prompt:

*Find and compile information on Contoso's new Protein Plus shake for an upcoming quarterly business review. We need an executive summary, as well as details on the social media campaign and competing products. Look for information in **/Market Analysis Report for Mystic Spice Premium Chai Tea.docx**, **/Contoso Chai Tea market trends 2023.xlsx**, and **/Market Trend Report - Protein shake.docx** to write the executive summary. The summary should sound professional, with a hopeful tone about our release blockers. The competitive analysis should also include links to the relevant products in a table.*
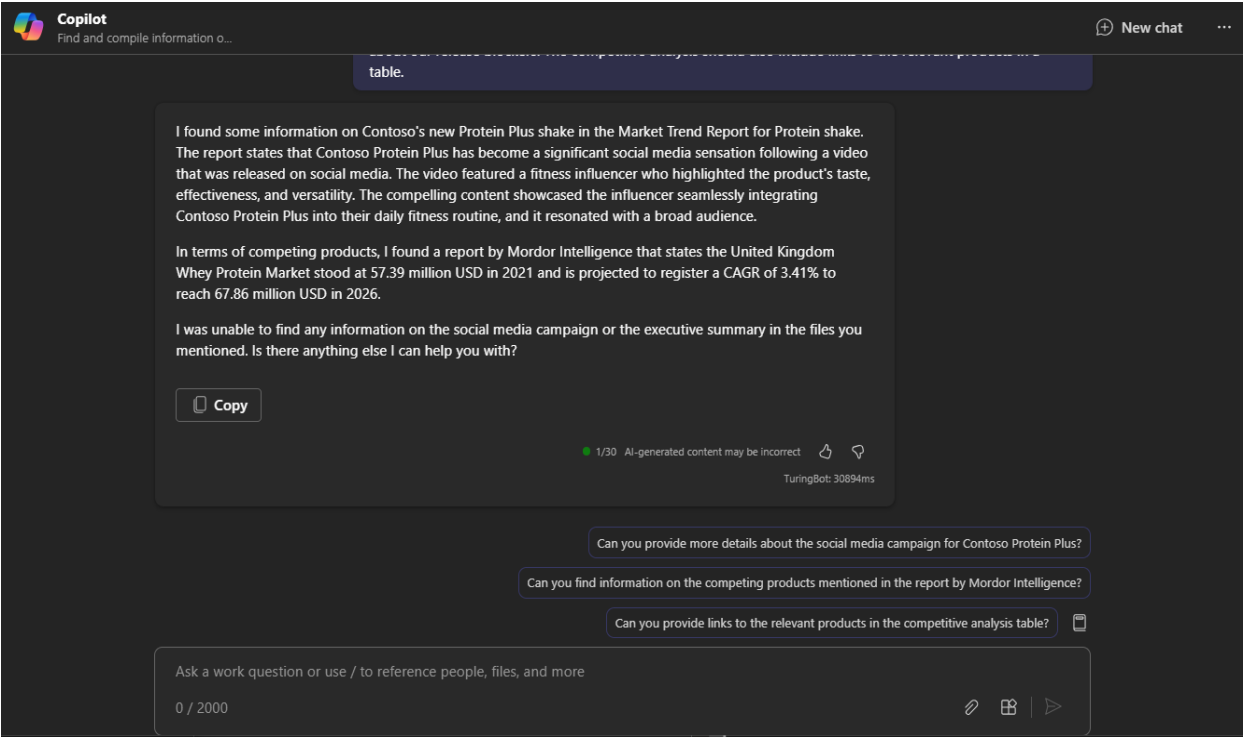
With the **Goal**, **Context**, **Source**, and **Expectations** all laid out, Copilot has everything it needs to give you a great response.

Explore more

You can also use Copilot to get summaries and catch up on things quickly. It can pull together quick summaries of projects, meetings, email messages, chats, and more. Use

it to find out what's due, get the latest updates on a project, or find recent communications from a colleague or manager quickly.

Here are some more examples:

- *Last week, someone shared a document that defined the key deliverable dates for Project X. What were those dates*?
- *Summarize messages from Sam over the past two weeks. Call out any important details, like deliverables, due dates, and action items for me*.
- *List the developments on Product Z that would be relevant to an executive who owns the product launch, based on collaboration over the past five business days*.

Summary

In this module, you learned about Microsoft 365 Copilot in various Microsoft 365 applications such as Word, PowerPoint, Excel, Teams, Outlook, and chat. Copilot is an AI-powered tool that assists with tasks like generating summaries, searching for specific information, generating ideas, tables, or lists, and data analysis. To craft an effective prompt from Copilot that yields the desired results, it's important to provide clear **Goal**, **Context**, **Source**, and **Expectations** in your prompts.

The main takeaways from this module are that Microsoft 365 Copilot is a valuable tool for improving productivity and efficiency in various Microsoft applications. When you craft efficient prompts from the start, Copilot can provide accurate and relevant responses to your queries and assist you in achieving your goals.

Key resources

- [Welcome to Copilot in Word](#)
- [Welcome to Copilot in PowerPoint](#)
- [Get started with Copilot in Excel](#)
- [Get started with Copilot in Microsoft Teams meetings](#)
- [Get started with Microsoft 365 Business Chat](#)