

# Introduction

In this module, you learn how to craft effective, contextual prompts for Microsoft 365 Copilot to **transform** documents, data, and text 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 editing, transforming, and rewriting information using Copilot in different Microsoft 365 apps such as Word, PowerPoint, Excel, Outlook, and others. You learn how to use these basic transformation capabilities using AI, 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. Organize outlines and content in Word documents with Copilot.
3. Convert text to tables and write more confidently with Copilot in Word.
4. Add images, slides, and organize your presentation with Copilot in PowerPoint.
5. Format, sort, filter, and highlight data with Copilot in Excel.
6. Rewrite messages with Coaching by Copilot in New Outlook.

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 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:

- [Graphic Design Institute - Employee Benefits.docx](#)
- [Mystic Spice Premium Chai Market Analysis Presentation.pptx](#)
- [Fabrikam Q1 marketing campaigns.xlsx](#)

**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 on.

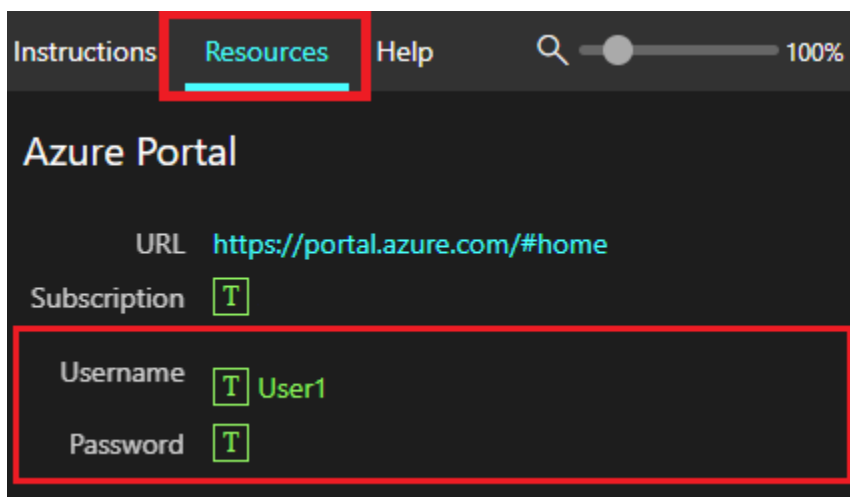
## Uploading Files to OneDrive

### Important:

You may skip this step if you have already uploaded all files from the folder "**C:\ResourceFiles**" to **OneDrive**.

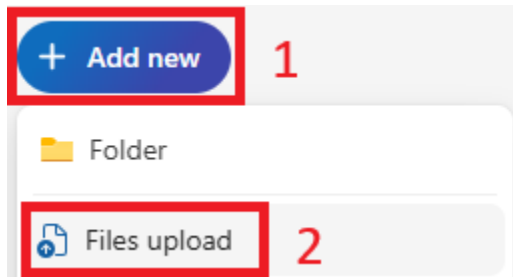
Follow the steps below to upload all files needed to **OneDrive**:

1. Log into the laptop provided by MINDEF/SAF.
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 **ResourceFiles** folder.
10. Select all files within the **ResourceFiles** 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 center 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.

# Write, organize, and transform content using Microsoft 365 Copilot in Word

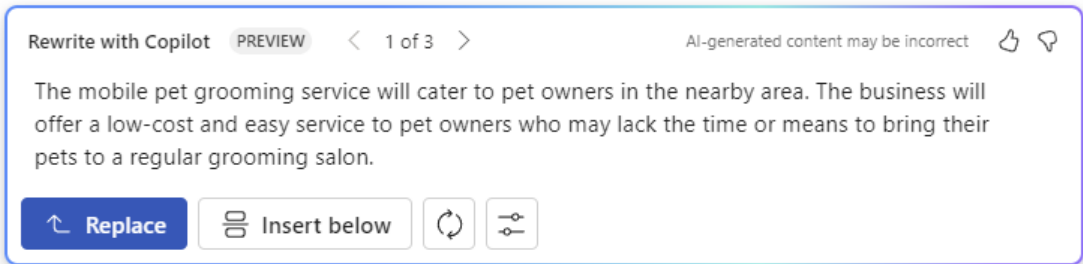
Microsoft 365 Copilot in Word allows you to stay in the flow of ideas while drafting new content and transform your content once you have your ideas written. Copilot can rewrite your text, including adjustments for tone. Copilot can also transform your text into an editable table. Follow the steps to transform your content in Word:

## Rewrite for tone

1. Select the text you want Copilot to rewrite.
2. In the left margin next to your text, select the **Copilot icon**.
3. From the left margin Copilot menu, select **Rewrite**.
4. Copilot shows you rewritten options to choose from.
5. Select **Replace** to use the revised text, **Insert below** to insert the rewritten text below the current text, **Regenerate** to regenerate Copilot's suggestions, or **Adjust tone** to adjust the rewritten text for desired tone.

### Target Market

The target market for the mobile pet grooming service will be pet owners in the local area. The business will focus on providing a convenient and affordable service to pet owners who may not have the time or resources to take their pets to a traditional grooming salon.



## Text to table



1. Select the text you want Copilot to turn into a table.
2. In the left margin next to your text, select the **Copilot icon**.
3. From the left margin Copilot menu, select **Visualize as a table**.
4. Copilot shows you what the table looks like.
5. Select **Keep it** to insert the table into your document, **Regenerate** to regenerate Copilot's table, or **Discard** to remove the table.
6. To fine tune the table, enter details into the Copilot compose box to state what to change about the table.
  - i. Changing a table's formatting isn't supported using the compose box, but the table's formatting can be changed by using the table options in the


Word ribbon.



A target market can be defined by several characteristics, including:


- Demographics (age, gender, income, education, etc.)
- Psychographics (values, interests, lifestyle, etc.)
- Geographic location (urban, rural, country, zip code, etc.)
- Buying behavior (in-store, online, thrift, etc.)

Category	Examples
Demographics	age, gender, income, education
Psychographics	values, interests, lifestyle
Geographic location	urban, rural, country, zip code
Buying behavior	in-store, online, thrift

Visualize as a table < 1 of 1 > AI-generated content may be incorrect  

 Keep it

Add more details for Copilot to generate 

In the following example, we start with a simple prompt to turn some text into a table and add elements along the way. Follow along with the example using your own data.

Let's get crafting

First, download [Graphic Design Institute - Employee Benefits.docx](#) and save the file to your **OneDrive** folder if you haven't yet done so.

Open the document in Word and highlight all the text in the document (press Ctrl-A). From the left margin Copilot menu, select **Visualize as a table**. After generating the table, follow up with Copilot using the prompts below to refine your results.


**Note:**  
**Starting prompt:**

*Visualize as a table.*

In this simple prompt, you start with the basic **Goal:** *to transform text into a table*. However, there's no indication what information you want in the table or why it should be a table.

< To fine tune the draft, add some detail and regenerate

We need a clear way to communicate these benefits to potential employees. Include a third column that clearly describes the benefit to the employee and how it impacts their wellbeing.



Element	Example
<b>Basic prompt:</b>  Start with a <b>Goal</b>	<i><b>Visualize as a table.</b></i>
<b>Good prompt:</b>  Add <b>Context</b>	Adding <b>Context</b> can help Copilot understand what kind of data to see and what it will be used for. <i>"We need a clear way to communicate these benefits to potential employees."</i>
<b>Better prompt:</b>  Specify <b>Source(s)</b>	The <b>Source</b> in this example is the entire text of <b>Graphic Design Institute - Employee Benefits.docx</b> .
<b>Best prompt:</b> Set clear <b>Expectations</b>	Lastly, adding <b>Expectations</b> can help Copilot understand how you want the table organized and written. <i>"Include a third column that clearly describes the benefit to the employee and how it impacts their wellbeing."</i>

**Note:**  
**Crafted prompt:**

*Visualize as a table. We need a clear way to communicate these benefits to potential employees. Include a third column that clearly describes the benefit to the employee and how it impacts their wellbeing.*

### Conclusion

GDI is proud to offer you a comprehensive and competitive benefits package that will enhance your quality of life and career satisfaction. As a GDI employee, you are part of a dynamic and creative team that strives to make a positive impact in the world of graphic design and digital media. We hope that you will take advantage of these benefits and enjoy working at GDI. If you have any questions or concerns about your benefits, please contact the human resources department at hr@gdi.com or 555-1234.

Category	Benefits	Impact on Wellbeing
Health and Wellness	Health insurance (medical, dental, vision), FSA, wellness program (gym membership, fitness classes, health screenings, counseling), EAP	Ensures comprehensive health coverage, reduces out-of-pocket expenses, promotes physical fitness and mental health, and provides support for personal and work-related issues.
Retirement and Savings	Retirement plan (6% match), financial planner, savings plan (10% salary)	Helps secure financial future, offers professional financial guidance, and encourages saving for emergencies or personal goals.
Education and Development	Tuition reimbursement (100%), in-house training (workshops, seminars, webinars, online courses), mentoring program, recognition program (certificates, bonuses, awards)	Supports continuous learning and career growth, provides opportunities for skill enhancement, offers guidance from experienced colleagues, and acknowledges and rewards achievements.
Work-Life Balance	Flexible work schedule, telecommuting policy, PTO (vacation, sick, personal, holiday), unpaid leave	Allows for better management of personal and professional responsibilities, offers flexibility in work location, and provides ample time off for rest and personal needs.
Other Benefits	Casual and creative work environment, diverse and inclusive culture, social and recreational program,	Fosters a relaxed and innovative workplace, promotes respect and celebration of individuality,

< 2 of 2 >

Visualize as a table

AI-generated content may be incorrect

✓ Keep it

↶ Replace

↺

🗑

For example, "Merge columns titled..." →

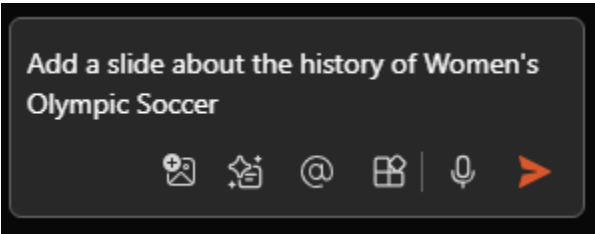
This prompt gives Copilot everything it needs to come up with a good answer, including the Goal, Context, Source, and Expectations.

**Important:**

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

# Add images, slides, and organize your presentation using Microsoft 365 Copilot in PowerPoint

Suppose you want to add a slide to a deck on the history of soccer. Ask Copilot in PowerPoint to “**Add a slide about the history of Women’s Olympic Soccer**” and it creates that slide for you.



Copilot can also step in to make what you have even better. Maybe you're teaching a cooking class and need some slides about making pizza, but it could use some images. Ask Copilot to “**Add an image of a chef making pizza dough**” and Copilot will find the perfect image to make your slide more appealing.

Give it a try with the following prompts and see what Copilot can come up with for you.

## Let's get crafting

First, download and open [Mystic Spice Premium Chai Market Analysis Presentation.pptx](#). Save the file to your OneDrive folder if you haven't yet done so.

**Note:**  
Starting prompt:

*Add new slides to this PowerPoint presentation.*

In this simple prompt, you start with the basic Goal: *to add new slides to a presentation*. However, there's no indication how many slides you want to add or even what topic they should cover.

Element	Example
Basic prompt: Start with a <b>Goal</b>	<i>Add a new slide to the PowerPoint presentation.</i>



<b>Good prompt:</b>  Add <b>Context</b>	Adding <b>Context</b> can help Copilot understand what the slides are for and what topic to focus on. <i>"...summarizing the latest market trends for premium chai, including key consumer preferences and emerging competitors."</i>
<b>Better prompt:</b>  Specify <b>Source(s)</b>	Adding <b>Sources</b> can help Copilot know where to look for specific information. <i>"Use insights from the existing slides on market trends and demand."</i>
<b>Best prompt:</b> Set clear <b>Expectations</b>	Lastly, adding <b>Expectations</b> can help Copilot understand how you want the slide organized and written. <i>"Format the slide with engaging visuals and concise bullet points for key takeaways."</i>

**Note:**  
**Crafted prompt:**

*Add a new slide to the PowerPoint presentation summarizing the latest market trends for premium chai, including key consumer preferences and emerging competitors. Use insights from the existing slides on market trends and demand. Format the slide with engaging visuals and concise bullet points for key takeaways.*

With the **Goal**, **Context**, **Source**, and **Expectations** all laid out, Copilot has all it needs to give you a great response.

## Explore more

**Important:**

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

# Format, sort, filter, and highlight data using Microsoft 365 Copilot in Excel

With Microsoft 365 Copilot in Excel, it's easy to highlight, sort, and filter your tables to quickly call attention to what matters to you. Using a single table in Excel, you can have Copilot effortlessly:

- Sort and filter your data.
- Apply simple conditional formatting.

To get started, format your data in a [supported format](#) and select the Copilot button in the ribbon. Then, tell Copilot how you'd like to manipulate the table to better view portions of your data.

In the following example, we start with a simple prompt and add elements along the way. Follow along with the example using your own data.

## Let's get crafting

First, download [Fabrikam Q1 marketing campaigns.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:**

*Sort this table.*

In this simple prompt, you start with the basic **Goal**: *to sort and filter an Excel table*. However, there's no indication how you want the data sorted and which field you want to filter.

Element	Example
<b>Basic prompt:</b> Start with a <b>Goal</b>	<i><b>Sort this table...</b></i>
<b>Good prompt:</b> Add <b>Context</b>	Adding <b>Context</b> can help Copilot understand what the slides are for and what topic to focus on. <i>"...to look for the most impactful salesperson."</i>

<b>Better prompt:</b> Specify <b>Source(s)</b>	The <b>Source</b> for this prompt is assumed to be the table we're working with in Excel. <i>"...this table [Table1]..."</i>
<b>Best prompt:</b> Set clear <b>Expectations</b>	Lastly, adding <b>Expectations</b> can help Copilot understand how you want the table sorted, filtered, and presented. <i>"and highlight the top and bottom campaign owners based off of net revenue."</i>

**Note:**  
**Crafted prompt:**

*Sort this table [Table1] to look for the most impactful salesperson and highlight the top and bottom campaign owners based off of net revenue*

This prompt requires multiple steps to execute, a prompting technique called **chaining** where you ask Copilot to perform sequential, back-to-back commands to achieve a single goal.

First prompt:  
Sort this table [Table1] to look for the most impactful salesperson.

Second Prompt:  
highlight the top and bottom campaign owners based off of net revenue

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

## Explore more

Try out these simple prompts to highlight, sort, and filters your data and add other elements to improve your results:

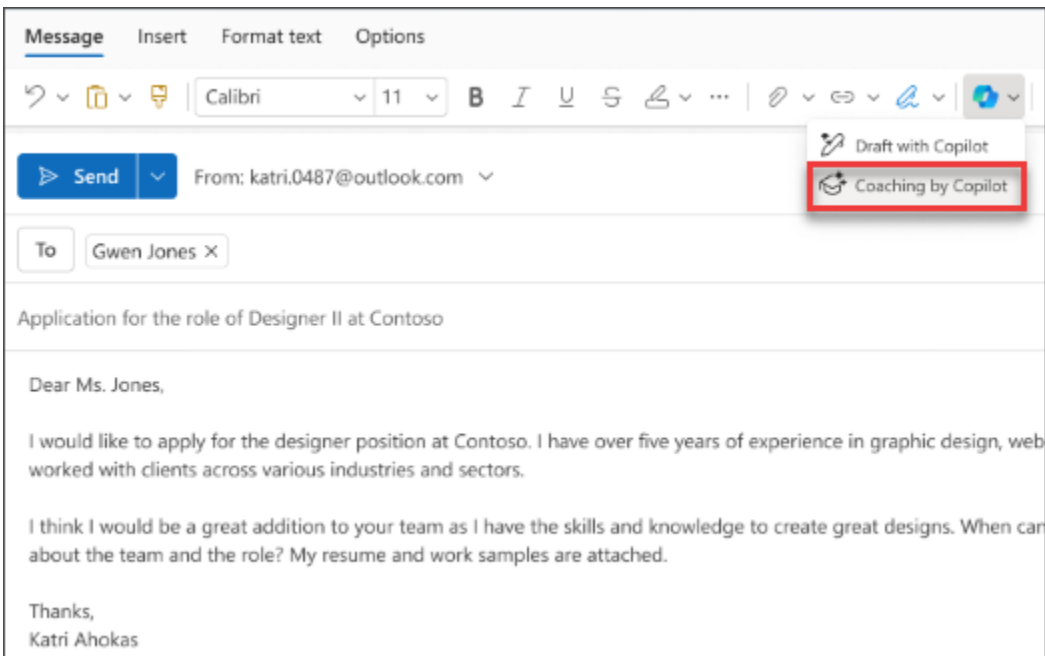
- Bold the top 10 values in the Sales column.
- Highlight the highest values in Units Sold.
- Sort engagement rate from smallest to largest.
- Filter to items that are due next week.

**Important:**  
Copilot will only work on files that are stored on OneDrive or SharePoint. If you can't select the Copilot button in the ribbon, try saving the file to the cloud first. For more information, see [Highlight, sort, and filter your data with Copilot in Excel](#).

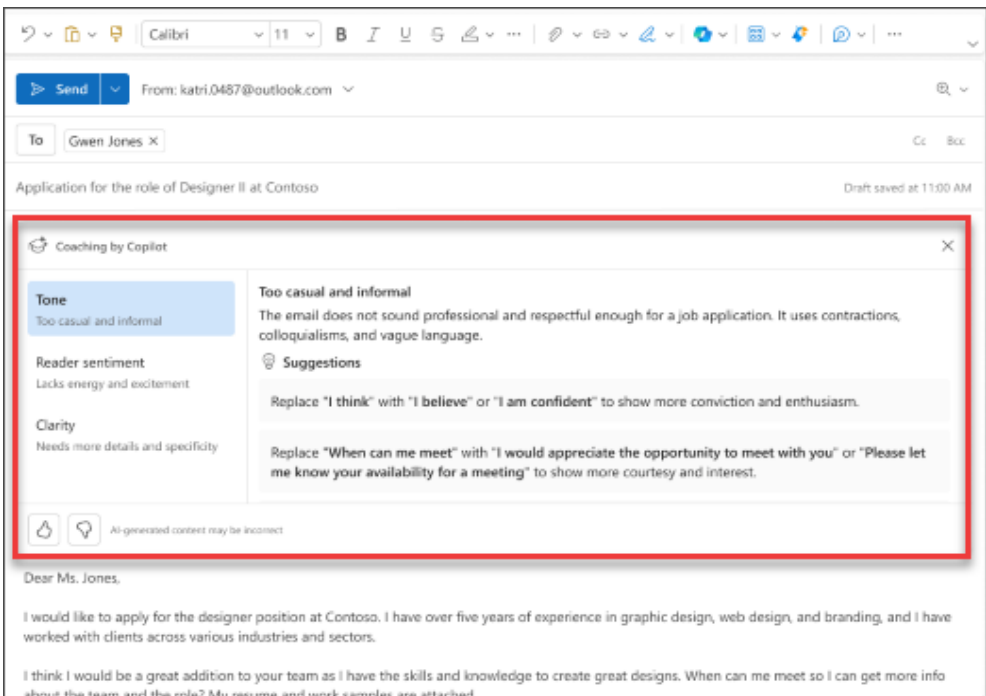
# Rewrite messages and replies for tone using Microsoft 365 Copilot in Outlook

Have an important email to write and want to feel confident that it effectively conveys your intended message? With Copilot in Outlook, you can get helpful suggestions on how to adjust the tone, clarity, and reader sentiment before you hit send.

1. In Outlook, select **Home > New Mail > Mail**. Type your email message.
2. Select the Copilot icon from the toolbar. Choose **Coaching by Copilot** from the drop-down menu.



3. Copilot reviews your email and offer suggestions on improving the tone, clarity, and reader sentiment.
4. If you like any or all of the suggestions, incorporate the feedback into the draft. When you're satisfied, send your email.



In the following example, we start with a simple prompt and add elements along the way. Follow along with the example after using Copilot to draft an email.

## Let's get crafting

First, ask Copilot in Outlook to draft a fictitious email with the following prompt:

*Draft a short product update announcement for customers about our latest software release. Highlight key new features, improvements, and how they benefit users.*

**Note:**  
**Starting prompt:**

*Review this email and make suggestions to improve it.*

In this simple prompt, you start with the basic Goal: *to improve the email*. However, there isn't much detail about what kind of improvements are needed.

Element	Example
<b>Basic prompt:</b> Start with a <b>Goal</b>	<i><b>Make this email more formal.</b></i>
<b>Good prompt:</b> Add <b>Context</b>	Adding <b>Context</b> helps Copilot understand the purpose of the email and what kind of improvements are needed. <i>"...so it sounds more professional and polished while maintaining a warm and engaging tone."</i>
<b>Better prompt:</b> Specify <b>Source(s)</b>	The <b>Source</b> for this prompt is the email you've already drafted in Outlook. <i>"...this email."</i>
<b>Best prompt:</b> Set clear <b>Expectations</b>	Adding <b>Expectations</b> helps Copilot understand the desired changes. <i>"Ensure the email is professional, concise, and highlights the key details of the product update clearly."</i>

**Note:**  
**Crafted prompt:**

*Make this email more formal. Ensure the email is professional, concise, and highlights the key details of the product update clearly.*

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

# Summary

In this module, you have learned about Microsoft 365 Copilot and its transformative features across Microsoft 365 apps, such as:

- Copilot in Word can rewrite your text and transform it into an editable table.
- Copilot in PowerPoint can assist in adding slides to your presentation and enhancing them with images.
- Copilot in Excel allows users to highlight, sort, and filter tables to focus on important information.
- Copilot in Outlook provides suggestions to improve the tone, clarity, and reader sentiment of your emails with Coaching by Copilot.

## Key takeaways

The key takeaways from this module are:

- Microsoft 365 Copilot is an AI-powered tool that helps with editing, transforming, and rewriting information using Copilot in different Microsoft 365 apps such as **Word, PowerPoint, Excel, Outlook**.
- To effectively use Copilot, provide clear prompts with a **Goal, Context, Source**, and **Expectations** to get the desired results.

## Resources

- [Transform your content with Copilot in Word](#)
- [Add a slide or image to your presentation with Copilot in PowerPoint](#)
- [Highlight, sort, and filter your data with Copilot in Excel](#)
- [Email coaching with Copilot in Outlook](#)