

# Introduction

In this module, you learn how to craft effective, contextual prompts for Microsoft 365 Copilot to ask for information within Microsoft documents and files. 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 **asking**, **analyzing**, and **querying** information using Microsoft 365 Copilot in different Microsoft 365 apps such as **Word**, **PowerPoint**, **Teams**, **Outlook**, and others. You learn how to use these basic creation capabilities, but also how to craft an efficient prompt that contains all the elements to generate the desired results.

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. Ask Copilot how to accomplish a task in Microsoft 365 apps.
3. Use Copilot to answer questions and provide insights about documents, presentations, tables, and notes.
4. Use Microsoft 365 Copilot to ask about projects, documents, and data throughout your organization.

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:

- [Market Analysis Report for Mystic Spice Premium Chai Tea.docx](#)
- [Mystic Spice Premium Chai Market Analysis Presentation.pptx](#)
- [Mystic Spice Premium Chai Tea product description.docx](#)
- [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.

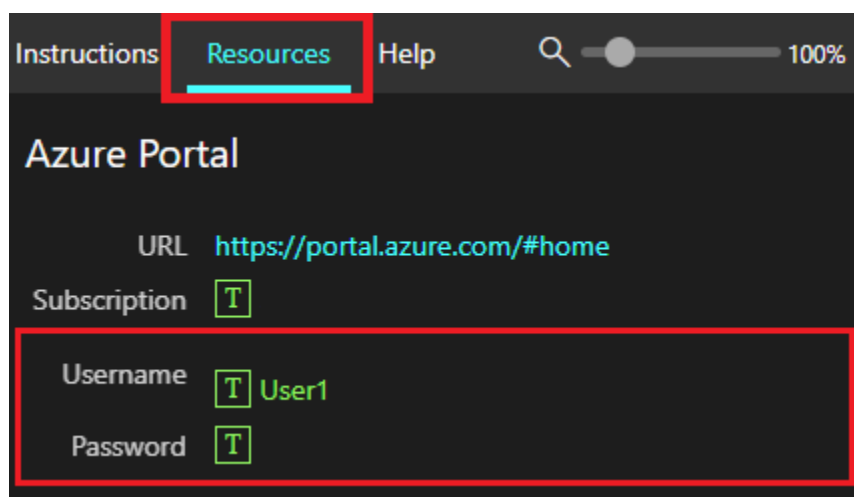
## Uploading Files to OneDrive

### Important:

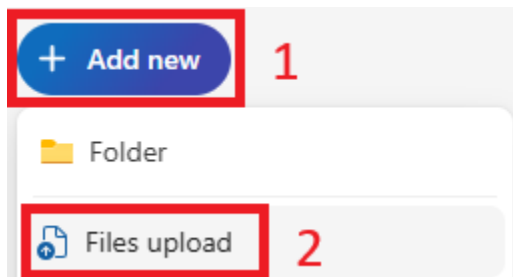
You may skip this step if you have already uploaded all files from the folder **"C:\ResourceFiles"** to **OneDrive**.

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](mailto: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 the **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 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.

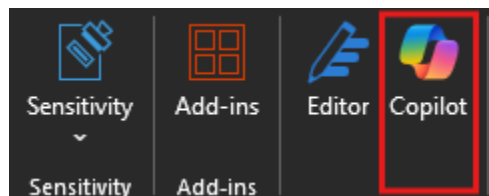
### Important:

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.

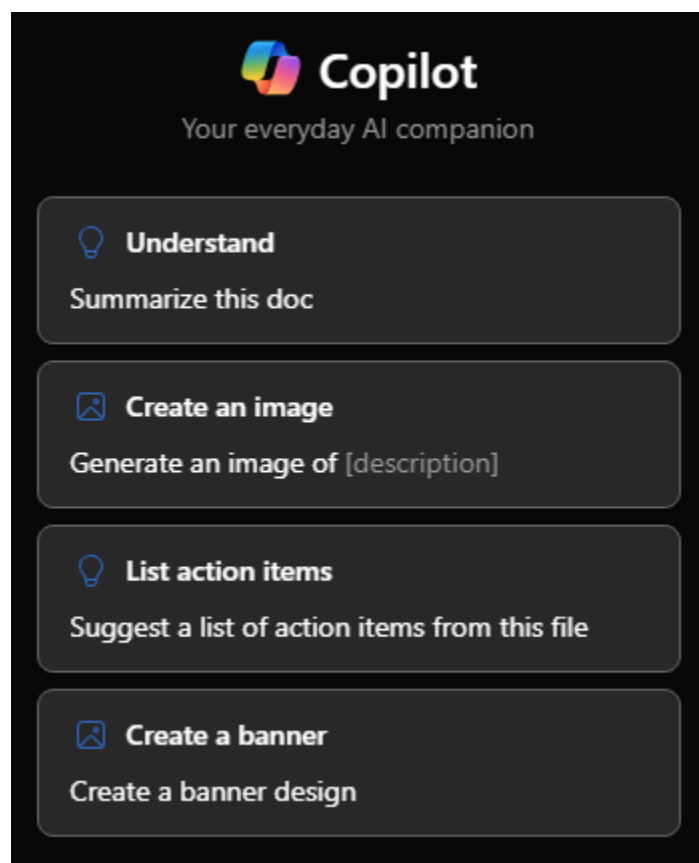
As you progress through the module, you'll have an opportunity to try out other prompts against these files and are encouraged to do so to explore and enhance your prompting skills.

# Ask Microsoft 365 Copilot in Word for help and recommendations

To chat with Copilot in Word, you can open the Copilot pane by selecting the Copilot icon in the ribbon's Home tab.



In addition to creating content or generating ideas, Copilot in Word has the ability to answer questions about the document you're reading. Once Copilot responds to your prompt, you can also view references with citations from where Copilot pulled information in your document.



## Ask questions about this document

- Summarize this document - Need to get to the essence of the document quickly? Type Summarize this document into the Copilot chat pane to get a bulleted summary of the document.
- Is there a call to action? - Wondering if the document contains a meaningful call to action? Ask Copilot, and it will attempt to tell you.

# Ask open-ended questions

Want to add some content or context to your document? Ask Copilot general questions, and it will try to give you answers. For example:

- How can I edit this document to make it sound more academic?
- Is there a quote by a United States President about courage?

If those answers aren't in the document, Copilot generates content using the underlying large language models. If you find something you like and want to add it to the document, just copy and paste from the Copilot pane to the document.

## 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:**

*Is there a call to action?*

In this simple prompt, you start with the basic **Goal**: *to find a meaningful call to action in the document*. However, you still haven't explained *why* you need this information.

Element	Example
<b>Basic prompt:</b> Start with a <b>Goal</b>	<i>Is there a call to action?</i>
<b>Good prompt:</b> Add <b>Context</b>	Adding <b>Sources</b> can help Copilot where to look for specific information. <i>"...in this market analysis report..."</i>
<b>Better prompt:</b> Specify <b>Source(s)</b>	Adding <b>Context</b> can help Copilot respond with context and give you a more tailored response. <i>"...to address our challenges and concerns. Please check if the marketing plan includes a clear and specific plan of action, such as a promotional plan or a limited time discount."</i>

<b>Best prompt:</b> Set clear <b>Expectations</b>	Lastly, adding <b>Expectations</b> can help Copilot understand what exactly you need, instead of just giving you a flat yes or <i>no</i> answer. <i>"Please provide suggestions for improving the call to action if necessary."</i>
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**Note;**  
**Crafted prompt:**

*Is there a call to action in this market analysis report to address our challenges and concerns? Please check if the marketing plan includes a clear and specific plan of action, such as a promotional plan or a limited time discount. Please provide suggestions for improving the call to action if necessary.*

## Market Analysis Report for Mystic Spice Premium Chai Tea

Prepared by Contoso Beverage Marketing Director

### Introduction

Mystic Spice Premium Chai Tea is a new product launched by Contoso Beverage, a company that specializes in producing and distributing high-quality beverages around the world. Mystic Spice Premium Chai Tea is a spiced tea drink that originated in India and has become popular around the world. It is a versatile beverage that can be enjoyed hot or cold, with or without milk, and with different spices and sweeteners. Chai tea has many health benefits, such as boosting immunity, reducing inflammation, and improving digestion. It also has a rich cultural and historical significance, as it is often associated with hospitality, friendship, and relaxation.

The purpose of this report is to provide a market analysis for Mystic Spice Premium Chai Tea, focusing on the Latin American region. The report will cover the following aspects:

- The product description, features, and benefits of Mystic Spice Premium Chai Tea
- The market trend and demand for Chai tea in Latin America
- The competitive analysis of Chai tea in Latin America
- The distribution channels for Chai tea in Latin America
- The promotion plan and strategy for Chai tea in Latin America
- The expected outcomes and challenges of the promotion plan
- The recommendations and conclusions for the future of Chai tea in Latin America

### Product Description

Mystic Spice Premium Chai Tea is a meticulously crafted blend that pays homage to the timeless traditions of Indian chai. Each cup offers an enchanting journey through the vibrant landscapes of India, bringing you an authentic chai experience right in your home. The product description, features, and benefits of Mystic Spice Premium Chai Tea are summarized in the table below:

Copilot

AI-generated content may be incorrect

Sure, let me check the document for you.

The **Market Analysis Report for Mystic Spice Premium Chai Tea** does include a call to action within the promotion plan and strategy section. The plan aims to increase awareness and interest in Chai tea among the target audience, position Chai tea as a premium, natural, and healthy product, encourage trial and purchase through various channels and incentives, and build loyalty and retention among Chai tea consumers through engagement and feedback <sup>1</sup>.

The promotional tactics mentioned include:

- Creating a catchy and memorable brand name and logo for Chai tea <sup>2</sup>.
- Developing a website and social media presence that showcases its benefits, features, and stories <sup>3</sup>.
- Launching a digital marketing campaign using SEO, SEM, email marketing, and influencer marketing <sup>4</sup>.
- Distributing free samples and coupons in strategic locations such as supermarkets, cafes, and health stores <sup>5</sup>.
- Organizing events and contests that invite people to try and share Chai tea with their friends and family <sup>6</sup>.
- Partnering with local businesses and organizations that share the same values and vision as Chai tea <sup>7</sup>.

However, the report does not specifically mention a limited-time

Can you provide more details on the digital marketing campaign?

What are the key metrics to measure the success of these promotional tactics?

Ask me anything about this document

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

**Important:**

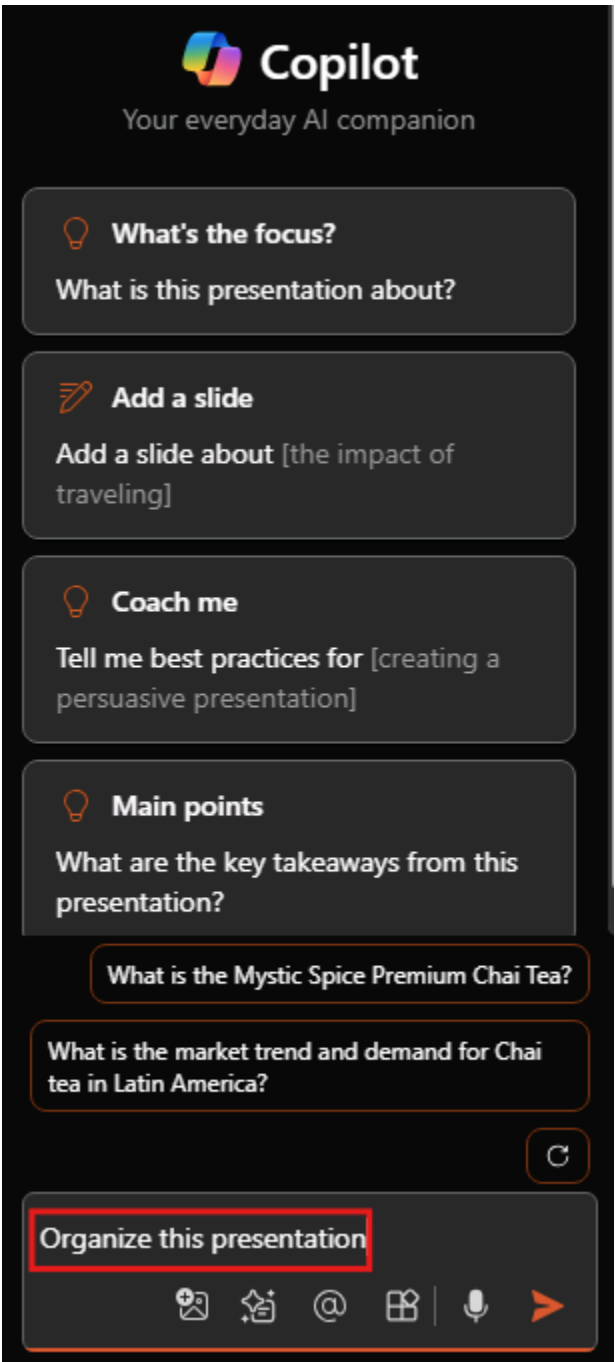
This feature is available to customers with a Microsoft 365 Copilot license or Copilot Pro license. For more information, see [Chat with Copilot about your Word document](#).

# Get design and organization tips with Microsoft 365 Copilot in PowerPoint

To start chatting with Copilot in PowerPoint, you can open the Copilot pane by selecting the **Copilot** icon in the ribbon's **Home** tab.



As you're creating a presentation, you may be unsure of how to organize your slides into sections. Copilot in PowerPoint can help. You can ask Copilot to organize your presentation. It organizes them into sections, and then adds section heading slides.



1. In the ribbon, select the Copilot button.
2. The Copilot pane opens on the right side of your screen.
3. Type **Organize this presentation** into the prompt field at the bottom of the Copilot pane.
4. Select **Send**.

If you don't like what Copilot does, you can simply select the **Undo button** on the ribbon to restore your deck to its previous state.

## Let's get crafting

If you haven't done so yet, download the following files and save the file to your **OneDrive folder** so they appear in your MRU list:

- [Mystic Spice Premium Chai Market Analysis Presentation.pptx](#)
- [Mystic Spice Premium Chai Tea product description.docx](#)

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

*Organize this PowerPoint presentation.*

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

Element	Example
<b>Basic prompt:</b>  Start with a <b>Goal</b>	<b>Organize this PowerPoint presentation.</b>
<b>Good prompt:</b>  Add <b>Context</b>	Adding <b>Context</b> can help Copilot understand the way in which you want to organize the deck and the reason for doing so. <i>"for an executive product review next week"</i>
<b>Better prompt:</b>  Specify <b>Source(s)</b>	Adding <b>Sources</b> can help Copilot look in a specific location, such as product specifications or a catalog. <i>"Refer to the /Mystic Spice Premium Chai Tea product description.docx for product information."</i>



<b>Best prompt:</b> Set clear <b>Expectations</b>	Lastly, adding <b>Expectations</b> can help Copilot understand how to structure the presentation and what level of detail to include. <i>"Arrange the slides by product and include an overview, a list of key features and benefits, customer feedback, and a comparison to similar products in the market."</i>
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**Note:**  
**Crafted prompt:**

*Organize this presentation for an executive product review next week. Refer to the /Mystic Spice Premium Chai Tea product description.docx for product information. Arrange the slides by product and include an overview, a list of key features and benefits, customer feedback, and a comparison to similar products in the market.*

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 [Organize this presentation with Copilot in PowerPoint](#).

# Analyze and work with tables using Microsoft 365 Copilot in Excel

If you're not sure how to write a formula for a new column, Microsoft 365 Copilot can quickly add new columns with formulas based on your data.

1. With your data formatted as a table, select the Copilot button in the ribbon.
2. Select **Add formula columns** or **Show suggestions for formula columns**.  
You can also describe what columns you'd like to add by typing it in your own words.
3. Copilot provides formula suggestions with an explanation on how each formula works. View the explanation by selecting **Explain formula**.
4. Select Insert column to add the formula column to your table.

**Important:**

As with any AI-generated content, it's important to review, edit, and verify anything Copilot creates for you.

## 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:**

*Suggest a formula column.*

In this simple prompt, you start with the basic **Goal**: *to create a new column with a formula*. However, there isn't enough detail to determine what the formula should calculate.

Element	Example
<b>Basic prompt:</b>  Start with a <b>Goal</b>	<i>Suggest a formula column.</i>

<b>Good prompt:</b>  Add <b>Context</b>	Adding <b>Context</b> helps Copilot understand what the formula should calculate. <i>"...for column J to determine the engagement ratio of each campaign."</i>
<b>Better prompt:</b>  Specify  <b>Source(s)</b>	The <b>Source</b> for this prompt is the specific columns needed for the calculation. <i>"...using the values from 'Engaged Users' and 'Total Users Targeted'."</i>
<b>Best prompt:</b> Set clear  <b>Expectations</b>	Adding <b>Expectations</b> helps Copilot structure the formula correctly. <i>"Ensure the formula divides 'Engaged Users' by 'Total Users Targeted' and formats the result as a percentage."</i>

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

*Suggest a formula for column J to calculate the engagement ratio of each campaign. Use the values from 'Engaged Users' and 'Total Users Targeted'. Ensure the formula divides 'Engaged Users' by 'Total Users Targeted' and formats the result as a percentage.*

G	H	I	J	K	L
Total Users Targeted	Engaged Users	Engagement Ratio			
4,205	465	11.1%			
2,000	500	25.0%			
10,000	362	3.6%			
35,000	5,418	15.5%			
10,000	285	2.9%			
2,500	496	19.8%			
950	618	65.1%			
2,000	367	18.4%			
4,205	902	21.5%			
3,687	673	18.3%			
5,278	1,029	19.5%			
55,000	1,470	2.7%			

Copilot

Looking at A1:I13, here's 1 formula column to review and insert in Column J:

Engagement Ratio

Calculates the engagement ratio by dividing the number of engaged users by the total number of users targeted for each campaign.

fx

=[@[Engaged Users]]/[@[Total Users Targeted]]

Show explanation

	I
1	Engagement Ratio
2	11.1%
3	25.0%
4	3.6%
5	15.5%
...	...

AI-generated content may be incorrect

Insert column

Show data insights

Show a suggestion for a formula column

Suggest conditional formatting

Ask a question, or tell me what you'd like to do with A1:H13

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

Use these prompts as a starting point. Copy and modify them to suit your needs.

- Calculate total cost per product in a new column.
- Add a column that calculates the total profit for each marketing campaign in 2022.
- Add a column that calculates the number of days after the product launch event.

For more information, see [Generate formula columns with Copilot in Excel](#).

# Ask questions about your notes using Microsoft 365 Copilot in OneNote

Copilot in OneNote supercharges your note taking and helps you understand, create, and recall information. With Copilot in OneNote, you're never limited by a set of predetermined prompts. You can freely chat with Copilot to complete a wide variety of complex tasks to transform OneNote into an invaluable assistant.

Chatting with Copilot can help you:

- Find information in your notes.
- Get tips and recommendations to improve your notes.
- Learn new information to add to your notes.

To chat with Copilot in OneNote, follow these steps:

1. Select **Copilot** in the ribbon to open the Copilot pane.
2. In the **Copilot compose box**, enter a prompt to ask Copilot to complete a task or ask Copilot a question.
3. Select the **Send** arrow.

## Let's get crafting

To get started, copy and paste the following text into a new OneNote page:

Q1 Webinars
1. AI in Business
Date: January 15, 2024
Total Attendees: 450
Engagement Rate: 72% (Active participation in Q&A, polls, and chat)
Key Takeaways:
- AI is reshaping customer service with automated chatbots.
- Predictive analytics help businesses forecast trends.
- Ethical AI considerations are becoming a priority.
2. Cloud Security Best Practices
Date: February 10, 2024
Total Attendees: 385
Engagement Rate: 65%
Key Takeaways:
- Zero Trust security models are on the rise.
- Multi-factor authentication reduces data breaches.

- Compliance requirements for cloud security continue to evolve.

3. Future of Remote Work

Date: March 5, 2024

Total Attendees: 500

Engagement Rate: 80%

Key Takeaways:

- Hybrid work models are now the standard for many companies.
- Virtual collaboration tools are improving productivity.
- Employees expect flexibility but still value in-person interaction.

Note:

Starting prompt:

*Which webinar had the most attendees and participation?*

In this simple prompt, you start with the basic **Goal**: *to find out which webinar had the most attendees and participation*. However, you could provide even more information so Copilot can generate a useful response.

Element	Example
<b>Basic prompt:</b> Start with a <b>Goal</b>	<i><b>Which webinar had the most attendees and participation?</b></i>
<b>Good prompt:</b> Add <b>Context</b>	Adding <b>Context</b> can help Copilot understand what you need the information for. <i>"...for our quarterly business review."</i>
<b>Better prompt:</b> Specify <b>Source(s)</b>	The <b>Source</b> for this prompt is assumed to be the notebook in OneNote, but you can get even more specific by referencing specific pages or topics. <i>"Please refer to the attendance data from the notes for the last quarter."</i>
<b>Best prompt:</b> Set clear <b>Expectations</b>	Lastly, adding <b>Expectations</b> can help Copilot understand how you fine-tune your results. <i>"Please calculate the total number of attendees and average participation rate for each webinar. Please identify the webinar with the highest attendance and participation rate and provide a brief summary of its topic and key takeaways."</i>

## Note:

### Crafted prompt:

*Which webinar had the most attendees and participation for our quarterly business review? Please refer to the attendance data from the notes for the last quarter. Please calculate the total number of attendees and average participation rate for each webinar. Please identify the webinar with the highest attendance and participation rate and provide a brief summary of its topic and key takeaways.*

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

## Important:

This feature is available to customers with a Microsoft 365 Copilot license or Copilot Pro license. For more information, see [Chat with Copilot about your notes and research questions](#).

# Ask about your meetings and messages with Microsoft 365 Copilot in Teams

Copilot in Teams meetings and calls helps you capture action items, different perspectives by topic, or unresolved questions. You can even ask Copilot to give you a response as a table, generating a markdown table that's ready for you to copy and share.

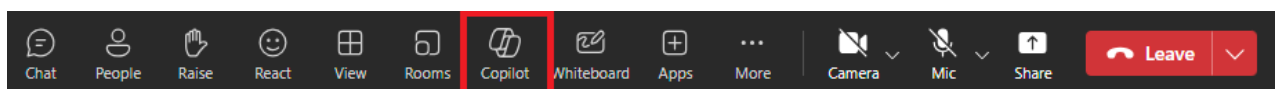
Copilot in Teams uses your Teams chat and meeting content to generate insights and actionable suggestions alongside your most important Teams touch points. Copilot in Teams is contextual to whatever it is that you're doing.

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.

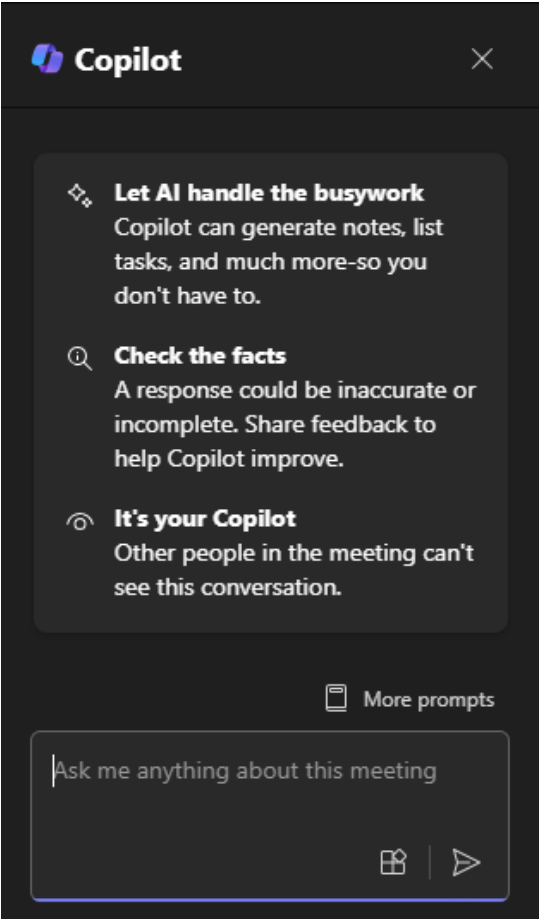
## Access Copilot during a meeting

1. 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.



2. 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.





## Start simple and add detail

**Note:**

**Starting prompt:**

*What questions are unresolved in this meeting?*

In this simple prompt, you start with the basic **Goal**: *to identify any open questions that weren't resolved during the meeting*. However, there's not very much information about the request or meeting.

Element	Example
<b>Basic prompt:</b> Start with a <b>Goal</b>	<b>What questions are unresolved in this meeting?</b>
<b>Good prompt:</b> Add <b>Context</b>	Adding <b>Context</b> can help Copilot understand the purpose and adjust the response accordingly. <i>"...in the client meeting regarding the new project proposal."</i>
<b>Better prompt:</b> Specify <b>Source(s)</b>	Adding <b>Sources</b> can help Copilot understand which meeting or part of the meeting needs to be searched, but in this case the Source is already assumed. <i>"in the client meeting?"</i>

<b>Best prompt:</b> Set clear <b>Expectations</b>	Lastly, adding <b>Expectations</b> can help Copilot understand what to do with the information it has found. <i>"Please identify any questions or concerns that were raised but not addressed in the last meeting. Please provide suggestions for addressing these questions and concerns in the next meeting."</i>
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**Note:**

**Crafted prompt:**

*What questions remain unresolved in the client meeting regarding the new project proposal. Please identify any questions or concerns that were raised but not addressed in the last meeting. Please provide suggestions for addressing these questions and concerns in the next meeting.*

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. By processing the meeting and chat transcripts, it generates responses to prompts such as:

- What questions are unresolved in this meeting?
- What opinions did team members have about this campaign?
- Create a table of pros and cons for this campaign.

For more scenarios on how to use Copilot in Teams meetings, see [Get started with Copilot in Microsoft Teams meetings](#).

# Summary

In this module, you have learned how to create effective prompts for Microsoft 365 Copilot to request information within Microsoft documents and files. You've also learned about Microsoft 365 Copilot and its various functionalities in different Microsoft applications. It generates insights and suggestions based on your files, documents, chats, and meetings. This module has equipped you with the knowledge and techniques to craft prompts that produce accurate and helpful results from Microsoft 365 Copilot.

The main takeaways from this module are:

- Microsoft 365 Copilot is a powerful tool that can assist you in various Microsoft applications such as Word, PowerPoint, Excel, OneNote, and Teams.
- Copilot generates the best response when you provide clear goals, context, sources, and expectations in your prompts.
- Copilot can help with tasks such as creating content, organizing slides, adding formula columns, enhancing note taking, and capturing insights in Teams meetings.

## Resources

- [Chat with Copilot about your Word document](#)
- [Organize this presentation with Copilot in PowerPoint](#)
- [Generate formula columns with Copilot in Excel](#)
- [Chat with Copilot about your notes and research questions](#)
- [Get started with Copilot in Microsoft Teams meetings](#)