

# 10 Copilot in OneNote

OneNote is an ideal app where Copilot can show its potential. It can help organize random thoughts that can then be pasted into slides or documents. If you're an avid *note* taker, keep reading!

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## Intended Uses

Microsoft publishes what they know will work well, both in its in-app prompt menu and in the Copilot Prompt Gallery. Here is a general summary about what's possible in OneNote (at the time of writing):

Feature	Description
<b>Organize</b>	Synthesize your chicken scratch.
<b>Summarize</b>	Paraphrase an entire section, a selection of text, or a specific topic.
<b>Rewrite</b>	Improve clarity and verbiage.
<b>Search</b>	Find all your notes on a specific topic.
<b>Ideate and Create</b>	Make agendas, outlines, and to-do lists, analyze ideas, ask questions, and get suggestions.

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## Activating Copilot within OneNote

As usual, activate Copilot from the upper right-hand side of the ribbon under your picture / name. Once you click to open the Copilot pane, you're ready to organize your thoughts, ask questions, or create to-do lists.

Like Word, you can also interact with Copilot within OneNote in the body of the notes. With a click, you're able to summarize content, draft actionable task lists, or update any portion (or the entirety) of your notes.

## Using Copilot in OneNote to its Fullest

The following table summarizes the main capabilities and constraints of using Copilot in OneNote:

### Organize

Capabilities	Constraints	Prompting Tips
Organize Content	Only the active page is analyzed.	"Organize the information into clear sections with headings, such as 'Current Situation', 'Gaps', 'Proposed Solutions', and 'Assumptions'"
Combine bullets into paragraphs	The response will not populate inside the OneNote. It'll be added in the chat box	"Organize the information into clear sections with headings, such as 'Technology', 'Costs', 'Challenges', and 'People.'"
Break paragraphs down into steps	Copying and pasting the response into a Word or PowerPoint will then allow you to continue to hone it.	"Break down the <topic> plan into steps."

### Summarize

Capabilities	Caveats	Prompting Tips
Summarize a long list of notes or body of text	Try this on an entire page, or if there are specific sections you want to summarize, highlight them and type "Summarize the highlighted section."	"Summarize these notes for key takeaways for IT professionals working in the xyz industry."  "What are some of the constraints and risks?"  "Summarize the main arguments in the notes."

## Rewrite and Improve

Capabilities	Caveats	Prompting Tips
<p>Rewrite bullet points as a paragraph</p> <p>Improve sentence clarity or writing quality</p>	<p>Watch your cursor (see "Troubleshooting" below).</p>	<p>"Rewrite these bullet points into a cohesive paragraph."</p> <p>"Improve the clarity of this sentence."</p> <p>"Expand upon this (highlighted) section and make it sound more professional, as if it were written by a &lt;xyz&gt; industry executive."</p>

## Ideate & Create

Capabilities	Constraints	Prompting Tips
<p>Create an outline</p> <p>Ideate and get suggestions</p> <p>Brainstorm a meeting agenda</p> <p>Draft a to-do list</p>	<p>The capabilities here are similar to those available in M365 Copilot Chat.</p>	<p>"Create an outline for a blog post on &lt;xyz topic&gt;"</p> <p>"What are the problems that need to be solved?" then "How would you suggest solving them?"</p> <p>"Brainstorm an agenda for the upcoming &lt;department or industry&gt; meeting agenda"</p> <p>"Draft a to-do list from these notes" or "Draft a to-do list from these notes for a &lt;job role&gt; trying to &lt;state your goal&gt; in the &lt;relevant industry&gt; business"</p>

## Pro Tips in OneNote

1. To write a custom prompt, use the right-hand chat box. At the time of writing, the inline Copilot wizard within the notes themselves won't allow you to write anything.
2. You can compare/confirm that your notes have been embedded into more formal documents (i.e. reports, contracts, memos). For instance, in the right hand window, ask "Did this information appear in the latest <description> contract?" Copilot will find related contracts in SharePoint or OneDrive, then scan whether it contained your notes.
3. At the time of this writing, Copilot's full functionality is limited to the OneNote for Windows application. There is **no official word on when or if Copilot will be available for the web version** of OneNote. You *can* bring up the standard Copilot chat box from within OneNote on the web, just not the inline Copilot wizard within the notes. Within the right hand chat window, you can "Summarize" a section or a notebook, or "Rewrite," but the changes appear in the chat window only, not inline on the notes page.
4. Don't bother googling something from a browser when you need information. **Type your search in the right-hand chat box and Copilot will provide a response**, which you can then copy and paste into OneNote. This is true for the chat box within all Microsoft 365 apps.
5. You might find it useful to save your favorite / frequently used prompts in OneNote for faster access!



# References and Resources