

4 Copilot Chat App

For some people, the first Copilot capability covered, Chat, is the most useful.¹ It's the *most diverse, and most like public GenAI tools like ChatGPT, Claude and Gemini*.

That's because it's like a chat bot, with a browser-like search box. Think of it like ChatGPT but with your data, which stays inside your organization's secure Microsoft 365 boundary.

Intended Uses

Unlike Copilot inside Word or PowerPoint, Copilot Chat can span different apps and content. It can't do all the app-specific things that Copilot can do within Word or PowerPoint, but it's often the best place to start.

Chat can combine information and create content using various sources at once, allowing shortcuts to save some hopping around. That's why for some; this capability is most useful. It's got the most diverse set of capabilities, all from one place.

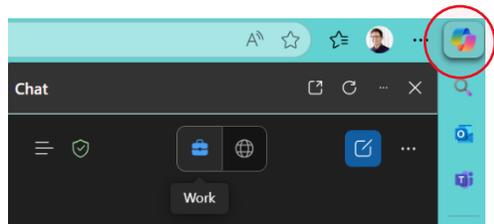
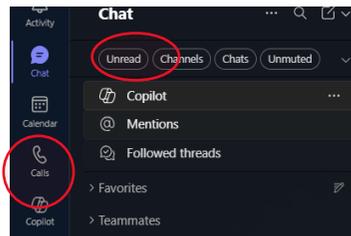
The table summarizes the high-level capabilities of Copilot Chat:

Capability	Description
Summarize and analyze	Quickly condense several documents, emails, meeting notes, and/or chat histories into concise summaries.
Generate content	Create drafts, reports, tables, spreadsheets, images, code, and more... all with natural language prompts.
Search	Find information across emails, files, meetings, chats, contacts, and the World Wide Web.
Stay ahead	Get suggestions on how you should plan your week, get ready for a meeting, be a better teammate, or draft an email updating your boss on your progress.
Be informed	Ask questions and get answers about your work data, catch up on meetings you missed, or summarize all the important items you missed while on vacation.
Create and complete code	Developers can use the same intelligence of the public GPTs with work-specific code.

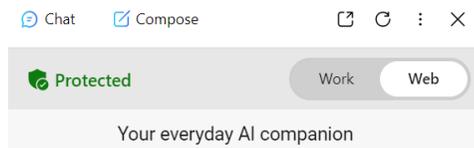
Ways to Activate Copilot Chat

There are a growing number of ways to initiate Copilot Chat:

1. Access [www.Microsoft365.com](https://www.microsoft365.com). This has become the landing page for all of Microsoft 365. It has a number of Copilot capabilities, like finding and launching agents, logs of past prompts, and way down at the bottom left, offers to start the other Office apps. This interface is now sometimes referred to as the Microsoft 365 Copilot App, and the name will change occasionally.
2. Use it in the desktop and mobile versions of Microsoft Teams. *If the icon isn't* already on the left rail of Teams:
 - a. Go to “Apps” on the left side of Teams.
 - b. In the search bar, type “Copilot”.
 - c. Scroll down to “M356 Chat” and select Add. This should add “Copilot” as an icon in the left-hand rail of Teams.
 - d. Select that “Copilot” icon within Teams and start interacting.
3. Inside Outlook, find the Copilot icon under the calendar icon on the left rail.
4. If using the Edge browser, click on the Copilot icon on the upper right (under the “X” button). Then, move the slider over to “Work” as shown at right.
5. In Word, Excel, PowerPoint, OneNote and most other Microsoft 365 apps, the icon to launch the Chat function appears in the “Home” screen near the upper right.



Notice that little green shield with a checkmark? Look Whenever the work/web slider is on “Web,” Copilot pulls data from the Internet, but keeps prompts and responses “Protected” in a secure enterprise boundary. Learn more about securing Copilot in Chapter 17.



Copilot's functionality is similar no matter which way you Chat with it. **Remember, though, LLMs don't provide the same answer every time.** Slightly different results are normal when accessing Chat in different apps and at different times.

How to Use Copilot Chat to its Fullest

There are many suggested prompts at the top of the Copilot Chat page. There's even a button to "View Prompts" above the chat box. Getting the maximum value requires an understanding of its functionalities and prompting it effectively.

Here's a breakdown of some key and lesser-known capabilities.

Train your Copilot with Memory and Instructions

When logged into www.microsoft365.com, click the "..." button at the top right, and then "Personalization."

If you'd created a "Tone of voice" doc (see "ProTip (#1) not to miss" in Chapter 3), Copy/Paste its contents into the "Custom Instructions" section, so responses sound more like you. You can also tell Copilot to reformat bulleted lists without colons or to not use em dashes, or whatever else you prefer.

You can use memory to customize Copilot's output and interactions.

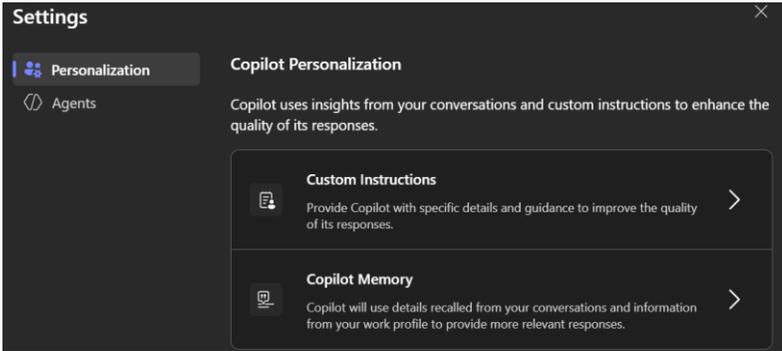
From the M365 Copilot Chat window, tell it things like:

- "Remember" that when you help me generate numbered or bulleted lists, that I prefer dashes instead of colons.
- "Remember that I lead the quarterly strategy reviews for the central region" and Copilot can surface relevant files, emails, or meeting notes when you're prepping for those reviews.
- "Remember" that I prefer to have pro/con tables in my responses.

Copilot generates memories for you automatically too.

Like many functions, at the time of writing, Memory works best in responses generated while in Copilot Chat. To see where it's working, ask "Did you use memory in that response?" and you might see something like "I did use your memory regarding formatting preferences (specifically, using dashes instead of colons for bulleted lists) to ensure the summary matched your style."

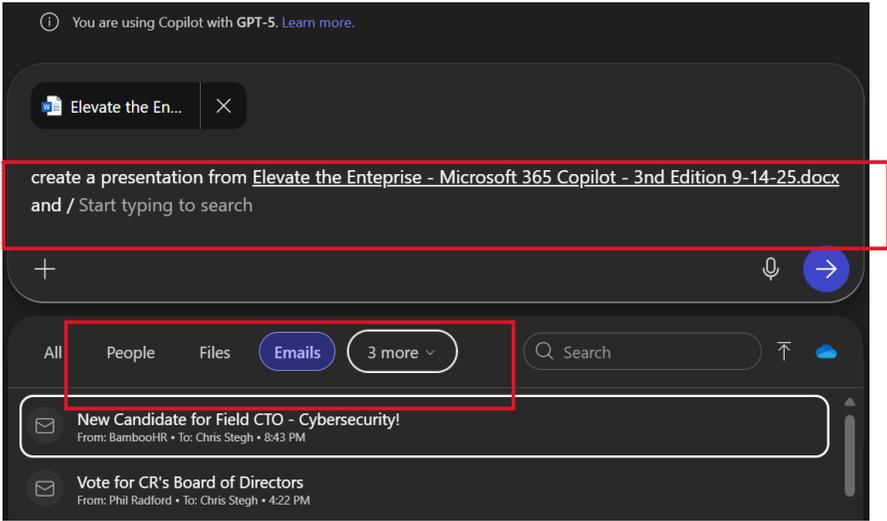
To see what’s in your current Memory, simply ask “What is in my memory?” from the M365 Copilot Chat screen, or click the “...” at the top right of the Copilot Chat app and then, “Settings.” There, you can read and delete some or all of what Copilot remembers about you and give additional instructions.



Summarize and Analyze

Capability	Constraints/Caveats	Prompting Tips
Request summaries of files, chat and/or email messages, or meeting notes.	<p>Summarization accuracy may vary depending on content complexity.</p> <p>If the meetings aren't recorded, then the info returned is limited to what may have been shared in chat.</p> <p>If a file you want to use doesn't appear, use the "Upload" button.</p>	<p>"Summarize what I need to know about the company's information security policy"</p> <p>"Summarize / <filename>" (pdf, doc, ppt, xls)</p> <p>"Summarize messages from /Jane Doe"</p> <p>"Summarize important emails"</p> <p>"Summarize the key points from <day's> <meeting name> meeting notes."</p> <p>"Summarize interactions with <person or company name>"</p>

Typing the / key brings up an inline search experience dubbed “ContextIQ,” with several options to narrow in and find content.

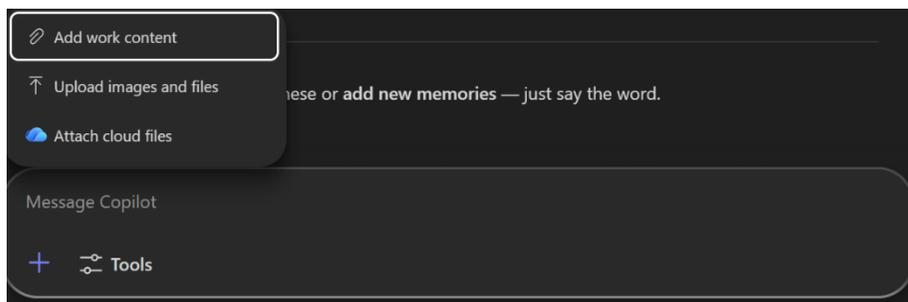


Analyze Content

Capabilities	Constraints/Caveats	Prompting Tips
<p>Upload a file and ask Copilot to take action on it.</p>	<p>Massive files (400000+ characters or more) may be truncated.</p> <p>Works best with Office files and pdfs.</p>	<p>“Analyze my draft report. Point out areas of poor logic, repetition, or grammar.”</p> <p>“Scan this file. Suggest improvements to my arguments.”</p> <p>“Analyze this spreadsheet and provide insights on our quarterly forecasts.”</p>

There are several options to upload and then analyze content.

1. Paste it into the Chat window.
2. “Add work content”
3. Upload images and files
4. Attach cloud files



Options 2-4 seem to overlap but serve different purposes, *mainly having to do with where the referenced content is located*. “Add work content” brings up the ContextIQ menu to reference existing work items (files, emails, people, sites). “Upload images and files” brings up Windows Explorer and lets you pick the file (from OneDrive, hard drive, or even shared folders) to send to the LLM for analysis. This is a good way to ask questions about screenshots or images “Attach cloud files” is less straightforward, since its navigation includes SharePoint sites and files and meetings that were recently shared with you. Neither #2 nor #4 require uploading; Copilot just finds and scans the content where it sits.

Generate Content

Capabilities	Constraints/Caveats	Prompting Tips
Draft emails, proposals, project plans, policies, resumes, and job descriptions.	<p>Responses will appear in the Chat window. Nothing can be changed inside of a doc, ppt, or xls itself.</p> <p>You can tell Copilot to "Create a .doc (or .ppt)" from Chat.</p>	<p>"Draft an email with the current status and next steps of <project name>."</p> <p>"Create a job description for <certain role>."</p> <p>"Create 3 marketing emails inviting customers in the <abc> industry to an upcoming charity `golf outing. Use a fun, summery theme."</p> <p>"Create an outline for a presentation for the board about quarterly performance from /filename and /email".</p>

Search

Capabilities	Constraints/Caveats	Prompting Tips
Ask to locate specific files, emails, or contacts based on keywords or context.	Relies on data indexed within your Microsoft 365 apps.	<p>"What is the company policy about personal time off?"</p> <p>"Find the email from /Jane Doe about <the topic>"</p> <p>"Show me the files /Jane Doe shared with me"</p> <p>"Show me the file about <topic> that /Jane Doe shared with me"</p>

Stay Ahead

Capabilities	Constraints/Caveats	Prompting Tips
<p>Inquire about calendar and upcoming events</p>	<p>If the meetings aren't recorded, then the information is based on the meeting's agenda and related files (based on keywords, even if files aren't attached to the meeting).</p>	<p>"When is the next time I meet with /Jane Doe?"</p> <p>"How can I prep for my next meeting with /Jane Doe?"</p> <p>"When was my last meeting with /Jane Doe?" and then</p> <p>"What was covered in my last meeting with /Jane Doe?"</p>

Q&A on Work Data

Capabilities	Constraints/Caveats	Prompting Tips
<p>Ask specific questions related to projects, colleagues, or meetings.</p>	<p>Answers are based on Copilot's analysis of your Microsoft 365 data.</p> <p>In a long interaction, Copilot may drift and answer too generally. If it does, be specific about projects and peoples' names in follow up prompts.</p>	<p>"What might Jane Doe ask when we give them her the pitch outlined in /<filename>"</p> <p>"What are the challenges of <project name> project?"</p> <p>"Who was assigned the task of <task name> in the <project name> project?"</p> <p>"What are some solutions to those challenges of the <project name project> and the pros and cons of each? Reply in table format."</p>

Commenting and Debugging Code

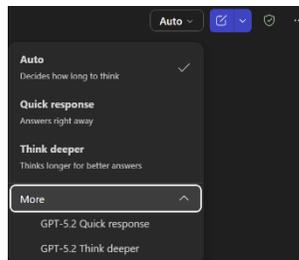
Capabilities	Constraints/Caveats	Prompting Tips
Receive code completion suggestions, explanations, and debugging assistance.	<p>Functionality is meant for basic developer use.</p> <p>GitHub Copilot is a more mature option for professional developers.</p> <p>If not looking for help on org-specific code, use the “Web” tab for richer answers.</p>	<p>“Write Python code to <combine 2 files>.”</p> <p>“Suggest C# code to <generate random numbers>”</p> <p>“Debug this code <insert code></p> <p>“What does this code do? <insert code>”</p> <p>“Reformat this CSS code to make all text on every page be Arial 11 font.”</p>

Troubleshooting Copilot in Chat

1. If asked something beyond its programmed range of functions, Copilot may respond with something like “Sorry, something went wrong. Please try again.” If that happens, it may require that a new chat be started. This could be in part due to its safe/responsible guardrails.
2. If you receive an error or undesired response, take a step back. Ask a more basic question, then interact with Copilot in iterative, conversational steps. Like when talking with a child, giving them too much information or asking too many questions all at once can be misinterpreted.

Pro Tips in Copilot Chat

- Start with the built-in prompts behind the “Show more” button.
- When referencing another file, start by typing “/” (forward slash) then the filename you want to use. If you don’t know the specific filename, typing a specific part of the filename should show the file for you to select.
- The more specific you are with your requests, the better Copilot’s results are. For example, instead of asking for “help with a project,” provide details like the project’s name, the type of assistance needed, and some of the people involved.
- Bounce back and forth between the Web and Work tabs. From the Edge browser or www.microsoft365.com, summarize some research about your topic from the “Web” tab. Then go over to the “Work” tab and combine the response with some of your company’s data. **For example:**
 - At www.microsoft365.com, click on the “Web” tab.
 - Try a prompt to research some publicly available information about a customer or topic. For instance, “Summarize the top 10 important messages about artificial intelligence that <<company to research >> made in its 2025 annual report. Create them in numbered format and go into some detail. Also provide your thoughts about the long-term impacts of those 10 statements. Keep your summary concise.”
 - Copy the response.
 - Click on the “Work” tab.
 - Take that public research and combine it with your company’s data. “Imagine you are the CEO of <your company name>. How can <your company name> align with <<Company you researched>> to combine their AI goals and our company’s capabilities in AI?” Then, paste in the 10 important messages from the “web” response.
 - Using the Work tab provides more custom responses.
- Choose the right LLM, by selecting the “Auto” dropdown at top left. At the time of writing, there are two models to choose from (quick or deep responses) and others will likely be added. Adding “think deeply” to any prompt will auto-select “Think deeper.”



Copilot Pages and Copilot Notebooks

Copilot Chat is great for assessing and creating new content for a single user. But when multiple people want to connect and collaborate on content that Copilot generates, Pages and Notebooks can be helpful.

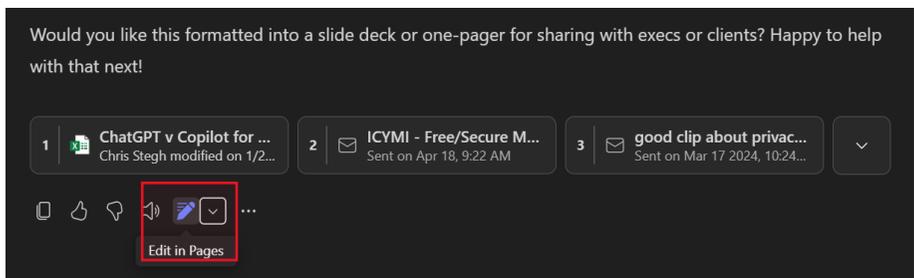
Copilot Pages, released in the fall of 2024, serve as a **place where multiple people can share and collaborate on the content they create with Copilot.** There, they can coauthor/edit, reformat, and quickly create a working version, together. Think of it like a physical whiteboard, with multiple people writing their ideas and taping their sticky notes, where they work together to organize a draft. AI creates the initial content.

Copilot Notebooks, on the other hand, are repositories for *many types of files*, which all can be reasoned over by Copilot.

How to Use Pages to their Fullest

Since Pages are for multiple people to collaborate in, an example of three users, A, B, and C, is used to explain.

User A has an idea and asks Copilot to help it generate a rough draft. They decide that they want to get B and C involved. At the end of Copilot's response, A clicks "Edit in Pages," as shown.



The response is copied to a new working panel, to the right of the response. A Page is simply a Loop-based component, so it can be shared or embedded into Teams. To collaborate with B and C, User A clicks the "Share" button, as in all Office apps, as shown.



There are two choices at the time of this writing:

1. Share a link to the page.
 - A can copy the link that's created, then email, IM, or post a link to the page for B and C to access. After clicking the link, B and C's browser will take them to a Microsoft Loop workspace. What is Loop? It's the Microsoft 365 service that Pages is built on. Moreover, it's an incredibly helpful way to coauthor content right inside of Teams chats/channels and emails (see choice 2 below).
 - Whenever a Loop is created, a page is created. That's where B and C will end up when they click on the invite. There, they can see A's response and start to coauthor, use Copilot themselves to add content, pull in data from their own OneDrive, etc. Putting it all into the one workspace is the purpose of Pages.
2. Copy the content and embed it into another Microsoft 365 app.
 - Using the second choice would allow A to embed the working copy of the Loop Page into an email or Teams chat. They'd simply copy and paste the link, and the entire working content shows up in the email or chat. Then, authorized recipients B and C edit and coauthor right from within the email or chat.

Note: in either case, User A must add B and C to the "People you choose" setting in order for them to be able to edit the page.

To identify the author of various sections of the document, including those written by Copilot, left-click on the text. A profile picture will show up; click it to see which segments of the paragraph were created by Copilot.

Example Use Cases for Pages

At first, Copilot Pages may seem like just another place to collaborate. But it's different than coauthoring in Word, or enabling someone to collab on a deck in PowerPoint. It's best used for multiple people using Copilot to create working drafts that'll eventually be formalized in a doc, email, or presentation.

Below are some examples of use cases:

- Business reports and presentations, like quarterly reports, project updates, and strategic planning documents. Copilot helps in aggregating data, generating insights, and presenting information in a clear, concise, and visually appealing manner.
- Academic research and papers, for students and researchers, since Copilot can cite sources, organize ideas, and suggest trains of thought.
- Content creation for marketing, such as ideas for blogs, social media, and promotions. Copilot helps brainstorm ideas, draft copy, and ensure consistency in tone and style, ultimately enhancing the quality and impact of marketing campaigns.

Example Use Cases for Notebooks

Again, Notebooks may seem like just another place to collaborate. They're best used for multiple people using Copilot to reason over a set of working documents in a single place. They're best for multi-source research, complex project work, and preparing long-form deliverables.

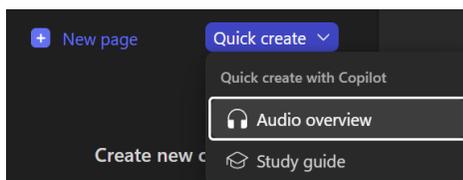
Notebooks aren't simply created by prompts and responses, like Pages. They're constructed from a curated "knowledge base" for Copilot to reason over. Then the responses can be iterated over time, and create a doc, ppt, or pdf as a more shareable output.

Files are linked within the Notebook, not deposited, stored, or updated there. Updates to your source material (i.e. on your OneDrive or Teams/SharePoint site) automatically reflect in the Notebook. Copilot is regularly scanning your source material to update in real time as your content updates.

Who could benefit from Notebooks? People like Project Managers (collate SOW and multiple deliverables into a final PowerPoint), Product Managers (compare our product plans with competitive research), Analysts and Researchers (assess patent-pending research versus recent university findings), Consultants (synergize market research with customer gap analysis), Executives (assess all proposed budget requests and prioritize based on business impact).

Basically, anyone working with many sources of truth (docs, recordings, PDFs, chats), needing deep reasoning, not just drafting, and whose output is often long-form, strategic, or analytical.

As shown, a Notebook is a terrific place to upload several knowledge sources and hear an audio overview of all of them at once, and to create a study guide for new teammates or even students!



Share Pages and Notebooks with Care

Pages can be shared with “People in <the organization>,” “People you choose,” or “People with existing access.” Care should be taken to pick the most restrictive access (“People you choose”) so as to not overshare the content, especially if working on a strategic or confidential topic. If your organization has configured it, Purview Information Protection can mark the Page as “Confidential” or “Internal” so as to protect it from being overshared.

A Notebook creates a Page as its initial output after it first scans and reasons through all of the content linked into it. That Page can be shared, broadly, as above. *The Notebook itself* can only be shared with individuals you select, which makes them more secure. Invited people can see the linked files within, but they may need to request access if they’re not permitted to see the root file based on its sharing settings.

A Notebook’s Audio Overview can be downloaded to OneDrive and shared from there. It’s an mp3 file, stored in a new location:
C:\Users\username\OneDrive – Org Name\Microsoft Copilot Chat Files\Copilot Notebook Uploads. If there may be sensitive information in the mp3, share it with care!

¹ The name had been “Microsoft Copilot with Graph-grounded chat,” but was renamed in September 2024 as “BizChat,” is currently “Microsoft Copilot App,” but may simply be “Chat” in this book.