

5 Copilot in Teams

When it comes to time savers, Copilot in Teams tops the list. Read on to explore how to use Copilot within Teams to summarize a meeting, brainstorm ideas, catch up, or customize chats.

Intended Uses

Whether catching up on missed chats or recalling a detail that was mentioned in a meeting, Copilot can be an immense help within Teams.

The following families of features are available

Capability	Description
Catch up on chats	Encapsulate recent threads and posts. Get insights on decisions. Catch up on open items. Summarize the next steps.
Optimize Meetings	Capture the main points and action items of meetings. Pay more attention instead of taking notes and tracking follow-ups.
Rewrite	Make your chat messages longer, more concise, more professional, or more enthusiastic!
Brainstorm Ideas	Get relevant suggestions related to projects, tasks, or challenges.

Activating Copilot within Teams

There are several places where the Copilot icon appears:

1. In the left-hand rail, which simply brings up the **Chat UI** as described in the previous chapter.
2. In **1:1 or group chats**, you'll find the Copilot icon at the top right. That's where you can catch up and brainstorm with Copilot ("summarize last 36 hours of chats here").
3. **Anywhere you can send a message**, "Rewrite with Copilot" appears in the "Type a Message" box. This is available in 1:1 or group chats, and in channels.
4. **During a meeting** (that's being *transcribed*), you'll find the icon on the top near the +Apps icon.
5. **After a meeting** (that has been *transcribed*), you'll find the Copilot icon behind the "Recap" button.

Using Copilot in Teams to its Fullest

There are fewer built-in prompts for Teams, and they aren't as detailed as Word, PowerPoint, or especially OneNote. Follow the prompts listed at Microsoft's Prompt Gallery <https://aka.ms/prompts> or use the charts below to unlock Copilot's potential!

Catch Up on Chats

Capability	Constraints	Prompting Tips
Get a summary or ask specific questions about topics covered in a 1-to-1 or group chat string.	Stay with the prompts suggested here, since other prompts (i.e., "summarize last 2 weeks") don't work as well. Copilot processes chats up to 30 days old (from the most recent message sent).	"Summarize highlights from the past 7 days" "What did <Jane> say about <topic>?" "Do we have any action items?" "How can I be a more supportive teammate to <Jane Doe>?"

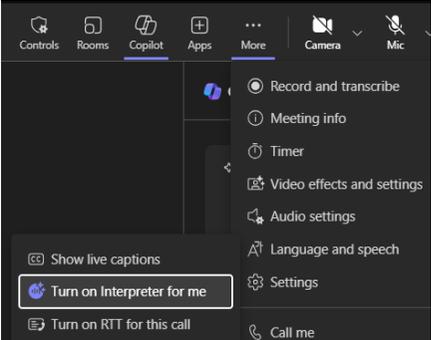
Catch Up on *Specific* Channel Messages

Capability	Constraints	Prompting Tips
Get highlights from a long, interactive channel post.	<p>Copilot only works in a Channel if it's a long, multi-response post. It does not (currently) work in short posts or across the channel.</p> <p>Nor (at the time of writing) does it summarize or combine info from multiple posts in the channel. i.e. You can't activate/ask Copilot "What are the highlights from this channel?"</p>	<p>(In a long channel post that gets consolidated on the screen, click "Open <x#> replies from..." The Copilot icon then appears at the top right).</p> <p>"Highlights from the conversation"</p> <p>"What decisions were made?"</p> <p>"What are the open items?"</p> <p>"Do I have any action items?"</p> <p>"What did <Jane Doe> say ?"</p>

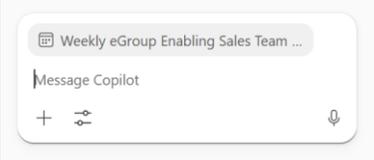
Before your meetings

Capability	Constraints	Prompting Tips
Use Copilot to add an agenda	Only works from the (New) Outlook, and only when the meeting is created from an email message string.	From the Outlook invite, simply click the "Draft with Copilot" button, and watch it create an agenda based on the email conversation.
Prepare for the meeting	There needs to be some context in your email or files to build a relevant agenda.	Right click on the meeting in Outlook or Teams' calendar, and select "Prepare for the meeting"
Add a Facilitator to help manage your meeting.	Cannot be added via Outlook (at the time of this writing). Can only "Turn on" as you're editing/creating the invite from Teams, or during the meeting (after clicking "...") then "Turn on Facilitator."	<p>In meetings where you've toggled "Facilitator" to "Turn on", your meeting is automatically transcribed.</p> <p>Just mention @Facilitator to: get quick summaries to catch up and keep the team updated with key insights</p>

Get insights during meetings

Capability	Constraints	Prompting Tips
<p>Catch up about what you missed or can't recall</p>	<p>The meeting must have a recording and/or a transcript.</p> <p>If your meeting has a transcript but was not recorded, the transcript is only available during the call (see Pro Tip 2).</p> <p>External people can't use Copilot during meetings they attend, only internal people with a Copilot license.</p>	<p>"When was I mentioned?"</p> <p>"Summarize what was discussed about <topic>"</p> <p>"Are there any action items for me?"</p> <p>"What ideas were covered?"</p> <p>"Who was in favor of <the idea>?"</p> <p>"Suggest clarifying questions to ask about <idea>."</p> <p>"List different perspectives about <topic>"</p> <p>"What did <Jane Doe> say about <comment or idea you want to recall>?"</p>
<p>Ask questions about the meeting to trigger other suggestions</p>	<p>Insights are based only on the content of this meeting, not from the Internet. Only expect answers about what was discussed in the meeting chat transcript.</p>	<p>"Have we achieved the goals of the meeting?"</p> <p>"What questions can the group ask to generate more ideas or insights? Limit each to 30-60 characters."</p> <p>"Did the team achieve consensus on <a decision> and what was it?"</p> <p>"What are the next steps and who owns each?"</p>
<p>The Interpreter agent in Teams meetings allows real-time speech-to-speech interpretation.</p>	<p>Best in meetings during which participants speakers prefer different languages, and for structured conversations where one person is speaking at a time.</p>	

Summarize the screen shares from meetings

Capability	Constraints	Prompting Tips
<p>Copilot can also analyze what was visually shared on screen during the meeting, such as:</p> <ul style="list-style-type: none"> • Slides • Documents • Spreadsheets • Web pages • Any other content shown via screen sharing 	<p>Recording and Transcription Are Required (not just transcription)</p> <p>Content must be shared for more than 10 seconds</p>	<p>“What screens were shared?”</p> <p>“Did <Jane Doe> share her screen?”</p> <p>“Pull out which sections <Jane Doe> covered while her screen was up”</p> <p>Prompts work best while in the meeting or in the Recap. You know you’re prompting the meeting directly when you see the specific meeting indicator in Copilot’s prompt Window.</p> 

Get recaps after meetings

Capability	Constraints	Prompting Tips
<p>After opening the meeting from Teams or Outlook, click “View Recap,” then click the Copilot button. Ask questions about the meeting to trigger other suggestions.</p>	<p>The meeting had to have been transcribed.</p>	<p>“For all ideas discussed, identify the pros and cons of each. Format in a table.” (Then ask which idea has merit, or how to implement an idea).</p> <p>“What are the unresolved questions?”</p> <p>“Given my other work and influence, what could I do next to assist?”</p>
<p>Get a podcast-style “Audio Recap”</p>	<p>Cannot (currently) be shared with others.</p>	<p>On the “Meeting recap” page, click “Audio Recap” to listen to a podcast style summary of the call.</p>
<p>Convert the recap into a custom template</p>	<p>This capability is available in Recap after meetings where transcripts were enabled.</p>	<p>While on the Recap screen, select “Custom Summary.” Then select “Speaker summary,” “Executive report,” or “Create template.”</p> <p>Under “Custom summary,” simply type the headers/sections of the notes you desire, like</p> <ul style="list-style-type: none"> “Key items Agreements Objections Next steps To dos” <p>Then Preview, and Save as Template for next time.</p>

Analyze and find

Capability	Constraints	Prompting Tips
Recall files or ideas in a 1-to-1 or group chat string. Also works in chat strings within meetings.	Responses are based solely on the content of the chat or meeting.	<p>“What challenges does <Jane Doe’s> team have?”</p> <p>“What did <Jane Doe> say about <topic>?”</p> <p>“What links were shared by <Jane Doe>?”</p> <p>“What files did I share with <Jane Doe>?”</p> <p>“Who suggested <idea>, and did anyone disagree?”</p>

Rewrite chat messages

Capability	Constraints	Prompting Tips
Like in Word, Copilot can rewrite your text	<p>To rewrite a chat that you start, tap the icon, and follow the prompts.</p> <p>You must start typing a message for the rewrite function to activate.</p> <p>Copilot can’t auto-reply, although Teams will suggest auto-replies.</p>	<p>Use the buttons to rewrite to be shorter or longer, in a more professional, casual, confident, or enthusiastic tone!</p> <p>Don’t like what you send? “Edit” a posted message, “Rewrite” it, and post again!</p>

Create AI Images

Capability	Constraints	Prompting Tips
Use Dall-E 3's image creator	<p>This can be activated with a Teams channel or in a 1-to-1 or group chat.</p> <p>Much like the web version of Dall-E 3, four images are created. It's not for inserting GIFs or images - others will see all of the images created... so use it like a brainstorming / marketing idea creator.</p>	<p>Type "@designer" followed by a description of the image you envision</p>

Troubleshooting Copilot in Teams

1. A common complaint is it's easy to forget to start the transcription during the meeting. **To avoid this, configure the Meeting Options to auto-start the transcription, when you set up the meeting.** In Outlook (or Teams). Click Meeting Options" (down below the "Join the Meeting Now" section, then on that website, select "Record and transcribe automatically."
2. An organization's IT retention policies could restrict how far back Copilot's summary feature may go. If chats less than 30 days old aren't recalled by Copilot, speak to your IT department.
3. Copilot needs to process some of the meeting dialog in its transcript before you can catch up or summarize. You'll need to wait for 1-2 minutes to begin conversing with Copilot.
4. If you stop the transcription during the meeting, you must restart again to continue to use Copilot, and there will be two transcripts/recaps.
5. Check Copilot's results before copying/pasting the notes and sending to colleagues or clients. Especially confirm or change the LLM's synopsis of the "Key Topics" and "Action items."
6. Recurring meetings that were created prior to the host being enabled with Copilot won't see the meeting transcript options. Unless Microsoft retroactively fixes this, schedule a new meeting to use such options, and delete the old series.

Pro Tips in Teams

1. If your organization or a participant in your meeting won't allow the meeting to be recorded, Copilot can still be used. To create the transcript that Copilot needs:
 - a. Under the 3 dot (...) ellipsis, click "Record and Transcribe," then "Transcribe." Select English or whatever language will be spoken.
 - b. Note that without a recording, the transcript is only available during the meeting. **Don't leave (hang up) the meeting before you ask Copilot all that you need to know!**
2. Another Meeting Option is if Copilot should be available "During and after the meeting," or "Only during the meeting." If the latter is configured, the temporary transcript gets deleted when the meeting or event ends, so Copilot is no longer accessible. See 1.b above! "During and after the meeting" ([EnabledWithTranscript](#)) is the default value.
3. After Copilot has summarized what was covered in the meeting you can ask it for more details about any individual item.
4. When summarizing meetings or action items, ask Copilot to respond with a specific format, like in a table or with bullets.
5. When in Teams, it's possible to open Copilot in a new window. Right click on its icon and select "Open in a new window." Leave it open all day to interact on demand!