

6 Copilot in Outlook

Copilot in Outlook can solve a universal problem... spending too much time in email! With Copilot, you can quickly and easily perform a wide range of tasks, from summarizing important emails to drafting responses and more.

Intended Uses

Copilot is designed to help you work more efficiently and effectively within Outlook. Here is a general summary about what's possible (at the time of writing):

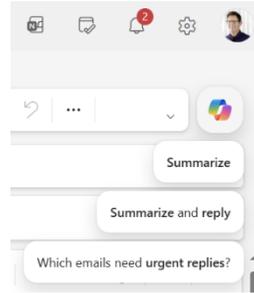
Feature	Description
Prioritizing	Scan the entire inbox and get suggestions on what's most important to read and review first.
Summarizing	Save time by highlighting important messages and summarizing long threads.
Drafting	Quickly draft suggested replies.
Coaching	After typing a response, Copilot can make edits to clean it up.

Activating Copilot within Outlook

The most current features are available in the new Outlook. You can activate Copilot within Outlook in several ways:

1. Within an email message:
 - a. Click on "New Email" to compose a new message (or forward/reply to an existing message).
 - b. Click on "Draft."
 - c. Select the type of message. Click the down arrow next to the formatting options (bold, italics, etc.).
2. Within an existing email string that you open:

- a. Open an incoming email or view it in the preview window.
 - b. Click “Summary by Copilot” in the bar above the sender’s name, or “Reply” behind the Copilot icon.
3. On the main Outlook screen, in the top-right corner, near your photo, clicking “Copilot” brings up a dialog menu specifically for Outlook-specific tasks, including shortcuts shown at right. → Here you’ll be able to prioritize your inbox with the “urgent replies” capability.
4. In the main Outlook screen, on the left-hand rail by the calendar button:
 - a. The icon simply opens a Copilot Chat screen, where you can prompt Copilot for tenant-wide search functions. See Chapter 4 for the capabilities there.



Using Copilot in Outlook to its Fullest

To help you get the most out of Copilot within Outlook, these charts outline the key capabilities, along with constraints and prompting tips. Don’t miss the calendar section!

Summarize an email string

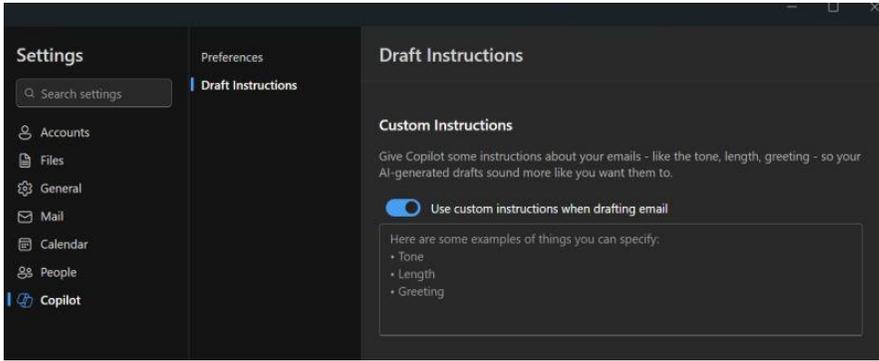
Capability	Caveats/Constraints	Prompting Tips
Copilot can summarize long email threads, highlighting vital information in chronological order.	<p>The summarized bullets don’t have links to the original emails below.</p> <p>The message must be in your Inbox, not Deleted or Sent items.</p> <p>Copilot may not use the oldest messages in an exceptionally lengthy conversation.</p>	Open a message. Then, above the sender’s picture or address, select “Summary by Copilot.”

Draft messages

Capability	Constraints	Prompting Tips
Copilot can quickly draft suggested replies to emails	<p>Make sure your cursor is in the body of the email, not in the "To" field.</p> <p>There is no limit to the length of draft that you create.</p>	<p>Select the "Draft" button after clicking Copilot in the toolbar while composing a message.</p> <p>Select an option "i.e. Request Info") and fill in some details (i.e. write "Draft a response thanking them and asking for more details").</p> <p>Click to "Keep it," "Discard," or modify, and use other options to specify the length and tone of the message. Hit send!</p>

Train Copilot to write your emails like you would

Capability	Constraints	Prompting Tips
Use memory instructions to make your emails sound more like you.	The memory instructions for email are separate (at the time of writing) from the Chat memory outlined in Chapter 4.	<p>You can find the Outlook "Draft Instructions" in File\Settings, as shown in the image below.</p> <p>You can also find it at the bottom of the list of drop-down options when you click on "Draft with Copilot" in a new email. (where you can click "Customize Drafts").</p> <p>There, type in how you want your emails to start, read, finish, etc.</p> <p>OR</p> <p>Copy/paste your "Personal Tone of Voice" file to really personalize emails (See "ProTip #1 not to miss" in Chapter 3) .</p>



Get coaching

Capability	Constraints	Prompting Tips
Make better, more well-crafted emails.	<p>Must be actively typing a draft message. Type in at least 100 characters.</p> <p>Copilot will give more content back than you might normally produce.</p>	<p>Find the Copilot icon and click, then “Coaching.” Suggestions appear in a table.</p> <p>Make it longer or shorter, or click “Keep it” if you love the coaching or “Discard” if you don’t.</p>

Search and Summarize Across your Inbox

Capability	Caveats/Constraints	Prompting Tips
Use general purpose Copilot commands after clicking the Copilot icon at the top right of the Outlook window.	Copilot will scan more than email, behaving much like Copilot Chat.	<p>“Summarize all messages about <topic>”</p> <p>“Summarize all messages from <person’s name>”</p> <p>“Tell me more about <topic>”</p> <p>“Summarize recent emails where I was ‘at mentioned’”</p> <p>“Find the file that <person> shared <when> about <topic>”</p>

Simplify Meeting Scheduling

Capability	Caveats/Constraints	Prompting Tips
Use Copilot to find mutually available calendar times.	<p>“Find the next available time” won’t automatically send the invite, whereas “Schedule the next available time” might.</p> <p>The / is important - it brings up the ContextIQ menu to find people.</p> <p>Prompting “Find the next available time...” you can be more confident that Copilot won't send the meeting invite without you being able to confirm / add to it.</p> <p>Once a meeting time is found, you can re-prompt Copilot to add an agenda with whatever you type.</p>	<p>"Schedule a 30 minute meeting during the week of 3/9 where /john doe and I are available."</p> <p>"Find the next available 30 minute time where /jane doe and /john doe and I are available."</p>

Schedule meetings from emails

Capability	Constraints	Prompting Tips
Create a meeting invite with an agenda from context from the email string	<p>Adds in agenda items based on the current email string.</p> <p>Only available in new Outlook.</p>	<p>Open the email, find the “Schedule with Copilot” option. It’s currently behind the “...” button the “Reply” buttons, where you’ll find “Other reply options.”</p> <p>Confirm/edit the agenda to your liking, find a time with the right attendees, and “Send.”</p>

Troubleshooting in Outlook

1. Copilot only works on the main mailbox of a user. It does not work on the user's archive mailbox or group mailboxes. It will work in shared / delegated mailboxes that the user can access. Copilot scenarios do not apply to mailboxes that are hosted elsewhere than Exchange Online.
2. At the time of writing, Copilot can't work within encrypted emails, on emails with Information Rights Management, and some Microsoft Information Protected emails.
3. Copilot may not summarize all messages in an exceptionally long thread, as LLMs have input limits.

Pro Tips in Outlook

1. Combine prompts for complex emails. Example: "Request a meeting next week with John and Sarah to discuss the marketing campaign. Briefly mention the recent market research findings in the email. Make the message three lines long or less."
2. The content Copilot generates is just a starting point. Edit and personalize the email for a polished final product.
3. Some capabilities, like summarizing long email strings, are available in Outlook for Mobile. There are feature gaps in the mobile app at the time of writing.
4. If you (still) love Outlook, you don't have to leave to leave to use Copilot to the fullest! After clicking the Copilot icon at the top right of the Outlook window, the window that pops on the right hand-side of the screen functions much like the Copilot Chat interface. For instance, when asking "Show me all chat messages from <person>," it'll summarize the Teams chats there (and give links to them).