

7 Copilot in Word

In Word, think of Copilot as a coauthor and interpreter. It can generate new content, convert content to a table, summarize long documents, and answer questions about the file. It can also provide inspiration and ideas and help improve your writing style.

Word is a well-suited Office app to use with a Large Language Model. It's Word(s), after all! But because it allows free prompting, it also may surprise you if used incorrectly. Scan or soak in this chapter to achieve the best results.

Intended Uses

Here is a general summary about what's possible (at the time of writing):

Feature	Description
Write a document	Tell Copilot the topic and use up to three reference files
Add content to a document	Adds content to the current document from the LLM and/or from reference files
Rewrite existing content	Change the tone of rewritten suggestions
Convert text into a table	Reformat paragraph into columns and rows
Summarize a document	Through a chat interface
Ask questions	Get answers based on the document content

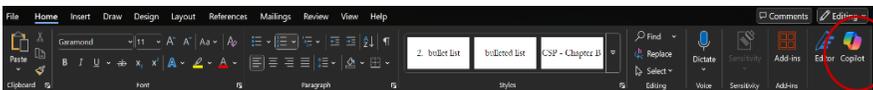
There are other capabilities, including several Pro Tips later in this chapter, which are left to the ingenuity of the Pilot!

Activating Copilot in Word

Copilot in Word can be *activated in two ways*, each serving a different purpose.

The two ways to work with Copilot in Word are:

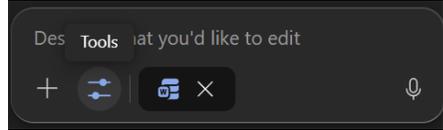
1. To **ask questions or get info about the document**, click the Copilot icon on the top right of the Home menu, as shown below.



That'll bring up the familiar Copilot Chat box on the right-side of the screen. There you can ask general-purpose questions about the document, get suggestions, and draft content that you can "Insert."

2. To **add text to the document**, you have two choices.
 - a. In the open Chat window, click the "Tools" icon, and select "Edit with Copilot" if it's not already active.

The little blue



Word icon means you've entered Edit Mode. At this point you can actively and iteratively add text and reformat the document.

- b. Click the icon that appears in the left-hand margin within the body of the document (as shown). Use this method to insert new text, or to make changes within the document. Copilot will generate its response then ask if you want to "Keep it" / "Replace" or "Insert" the new text below the highlighted section.



Draft with Copilot
(Alt+I)

What to use when?

"Edit mode" is designed to complete *multi-step tasks* with greater *integration into the doc*, and does much more when it comes to **formatting** and *making changes to the doc beyond adding text*. "Draft with Copilot" focuses on *generating or refining text inline* from your prompt and the content you provide.

Using Copilot in Word to its Fullest

The following tables summarize the main capabilities and constraints of the two ways of using Copilot in Word:

Generate content in the body of the document

Capabilities	Constraints	Prompting Tips
Draft and insert new content directly into the document .	Copilot generates a response and asks if you want to keep it, regenerate it, or discard it.	Click on the “Draft with Copilot” pencil in the left-hand margin. Then in the “Describe what you’d like to edit” box, type what you’d like to do, i.e.: “Create a 1 page executive summary under the existing headings.” “Add a paragraph about <topic>” or “Insert a sentence about <topic>” “Add a ‘Next Steps’ section with 5 action items based only on commitments already in the document.” “Add a glossary” (about a highlighted section) or “ Add a conclusion and call to action. ” Spend some time on your prompt. Provide Copilot a persona and lots of context!

Generate content from another doc

Capabilities	Caveats	Prompting Tips
Add text from another file, email, or meeting.	Any file you wish to reference must be in SharePoint or OneDrive . Files you can reference include .doc, .pdf, or .ppt.	Click the Copilot icon in the left margin, then ask to “Create a document from /<filename>” or “Add a paragraph about <topic> from /<filename>” Add a persona and context.

Copy/paste content from another doc	Validate the formatting of numbered lists and bullets.	Click the Copilot icon in the left margin, then ask to “Copy/paste the “section name” section from /<filename>”
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Regenerate content in the body of the document

Capabilities	Constraints	Prompting Tips
Rewrite content that you highlight.	<p>Copilot may reformat numbered lists into bullets.</p> <p>Copilot currently doesn't rewrite content in tables or other non-text elements.</p>	<p>Highlight text and select “Auto rewrite” then select one of the suggestions to “Replace” or “Insert below.”</p> <p>“Visualize this section as a table.”</p>

Improve your writing

Capabilities	Constraints	Prompting Tips
Break through those sticky spots when you can't find the words or know what to cut.	Give a persona or tone of voice if it's helpful.	<p>“Add a short transition sentence here explaining the next section.”</p> <p>“Shorten the selected paragraph by about 25% without losing key points.”</p> <p>“Add a clear section heading above this paragraph.”</p>

When using these next prompts and other **general-purpose questions**, type **them into the chat box**, which appears after clicking the Copilot icon at **upper right** of the Home menu.

Change or fix formatting using Edit Mode

Capabilities	Constraints	Prompting Tips
<p>In the right-hand chat box, after clicking the Tools icon, interact deeply with the formatting and text in the document.</p>	<p>Multi-step commands (i.e. inserting a footer or table of contents) are still works in progress. Copilot may provide manual instructions instead.</p> <p>When Edit Mode is thinking, there will be a short time where no changes can be manually made to the document.</p> <p>In docs where multiple changes are made, you may be prompted to “Keep all.”</p> <p>At the time of writing, adding content to existing .docs is possible faster using the left-hand pencil icon. But formatting can only be done with Edit mode.</p>	<p>“Replace emdashes with commas or other appropriate punctuation.”</p> <p>“Change any list with 4 or more bullets to a numbered list.”</p> <p>“Apply built-in Word styles consistently - Title, Heading 1, Heading 2, Normal. Don’t change wording.”</p> <p>“Replace manual bold/large headings with Heading styles where appropriate. Do not rewrite text.”</p> <p>“Fix heading numbering so Heading 1 sections have 1, 2, 3, in front of them. Heading 2 sections should follow 1.1, 1.2, 1.3 under each Heading 1 and restart correctly. Apply changes directly.”</p> <p>“Convert the selected text to active voice. Preserve meaning and facts.”</p> <p>“<i>In the selected text</i>, remove double spaces after periods and normalize spacing to single spaces. Don’t rewrite wording.”</p> <p>“Scan the doc and look for inconsistencies. Prompt me to fix them in order.”</p>

Use the chat box to ask questions about the doc

Capabilities	Constraints	Prompting Tips
Use the right-hand chat box to get relevant information about the document.	<p>Be precise when looking for specific content. Find (Ctrl-F) may work as well.</p> <p>Images may not be processed (currently).</p>	<p>In any document, ask things like: "Please summarize" "What lessons could an <xyz job function> professional learn?" "Is there a call to action for <xyz job function>?"</p>

Use the chat box to improve your content

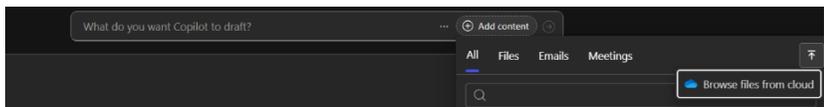
Capabilities	Caveats	Prompting Tips
Get suggestions to help you create high-quality content.	Using the chat box does not update the document. Select to "Insert" new content if desired.	<p>Ask "How can I edit this document to make it sound more <<academic>>?"</p> <p>"Check for inconsistencies in this document."</p>
Critique and improve your writing	Providing a persona here has little to no effect, but specifying the audience can.	<p>"Proofread my document for grammar, punctuation, syntax, bias or poor optics, and originality." "Identify sentences in my writing that are unclear and difficult for a board of directors to understand." "Suggest ways I can improve the flow and structure of my writing." "Analyze my argument. Present counterarguments against it. The argument needs to be bold and ambitious, and also needs to advance ideas far beyond the obvious." "Elaborate on the <topic>. Elaborate again. Elaborate again."</p>

Use chat box to get info from beyond the doc

Capabilities	Caveats	Prompting Tips
Interact with the chat bot in a similar way as using ChatGPT or Copilot Chat	Copilot cannot perform document-related commands such as formatting or inserting comments, or create content related to sensitive topics.	“Create a plan to <do something>” – then to add the response from the Chat Box to the body of the document, click “Insert.”

Troubleshooting Copilot in Word

1. Copilot is currently limited in the number of words it can process per prompt.¹ Notice that you can only type 16,000 characters in the prompt window. There’s also a **limit to the size of the file you reference in your prompt**. The limit is about 300 pages, or 1.5 million words. If it’s longer than that, Copilot processes only the beginning of the document (up to its limits) and then *ignores anything beyond that*.
2. **If something is not behaving as you’d expect, open the document using Word in the web browser.** Navigate to <https://word.cloud.microsoft/> and sign in, and open the document you want. Formatting in Word online is less strict than the desktop app.
3. For example, **to create a new doc from content in a doc on SharePoint, use the web browser.** There, you can either copy and paste the URL of the SharePoint file after typing “/” or you can use the “Browse files from Cloud” chooser menu (as shown below).



If you have SharePoint folders synchronized to your computer, you’ll be able to navigate and select from those files. This chooser is not (yet) in the desktop Copilot in Word.

Pro Tips in Word

1. You can activate “Track Changes” before asking Copilot to add content or reformat the document.
 2. You can “undo” (Ctrl-Z) Copilot’s changes, as long as the cursor is in the document (not in the Copilot window).
 3. To **give feedback on Copilot’s suggestions or report a problem**, you can use the Thumbs Up or Thumbs Down buttons in the Copilot pane. Your feedback helps Microsoft improve Copilot and make it more useful for you, but uncheck the box to “share prompt, generated response and log files.” See Chapter 17 for reasons why this may violate your organization's security policies.
 4. **Change the tone** of content that you've written or rewritten with Copilot, by selecting the text, and selecting the Copilot pencil in the left margin. Then, “Make formal” or “Shorter” or “Auto Rewrite.”
 5. If you’re **concerned about copyright or originality**, you can check for similarity to online sources. In Word, on the Home tab, go to Editor, and scroll down to “Similarity.” You’ll be directed to any content in your document that was pulled from online sources and offered an option to cite the source or manually paraphrase.
 6. To that end, **experienced readers can tell what is created by a human vs generated by AI**. Be advised that Copilot could produce similar content for multiple users who are giving Copilot the same kind of prompts.
 7. Overall, consider the content that is generated to be a draft. Use your Word techniques and writing preferences to make it your own. **You are the Pilot!**
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