

How to Use Copilot with Microsoft 365 Apps





What is Copilot for Microsoft 365?

Copilot is an **intelligent assistant** that helps you create and edit documents, presentations, spreadsheets, and more.

Copilot can generate text based on your input, such as a topic, a question, a keyword, or an outline. Copilot can also help you with formatting, grammar, spelling, and style. Copilot learns from your feedback and preferences and adapts to your writing style and tone.





Copilot works with Microsoft Office applications, such as Word, Excel, PowerPoint, and Outlook, as well as other popular tools, such as Google Docs, Gmail, and Slack.



In Word, the Copilot button is at the end of the Home ribbon.

D

When you click the button, you see the Copilot pane.	Q Understand Summarize this doc [in 3 key points]	In Word, you will also see a copilot icon in the marg type. Clicking on the copilot icon will bring up th Copilot box to ask it to create something, then	ne Draft with
You can use the Understand or Ask options at the top of the	Ask How can I more concisely describe [time management?]	Draft with Copilot Create me a bulleted list containing top 5 reasons to use copilot	×
screen, click on any of the suggested buttons, or type something in the "Ask me anything…" text box.	Summarize this doc Is there a call to action? C Ask me anything about this document	65/2000 Generate 🖉 Reference a file	

Once it generates an answer, you will then see the following options:

< 1 of 1 > 🌶 C	reate me a bulleted	Al-generated content may be incorrect	3	8
🗸 Keep it	ن الله الله For example, "Mak	e it formal"		Þ

You can then keep the generated text, regenerate it, delete it, or modify it.

Copilot is also available in Word when you right-click on a selection.

Searc <u>h</u> "Copilot" Synonyms	>	ay be incorrect 🖉 🛇
Copilot	>	🞲 Write a Prompt
A ⁱ⁾⁾ <u>R</u> ead Aloud		 ➢ Auto Rewrite III IIII IIIII
© L <u>i</u> nk	>	

Bottom line: Copilot can improve your writing by suggesting phrases, correcting grammar, and even offering different writing styles. It can't, however, replace proofreading or in-depth editing.



In Excel, Copilot only works if your workbook is currently being saved to the cloud and AutoSave is on. It also only works with data stored as a table. If you start using Copilot on a blank workbook, it will tell you that the data must be a table, OR it can create an example table for you to play with the Copilot options.

Copilot

The **Copilot** button is at the end of the Home ribbon. When you click the button, you see the **Copilot** pane.

Once your data is stored as a table, the Copilot pane will give you options to create formula columns, show data insights, highlight, filter, and sort your data, and also provide you with an Ask a Question box to ask questions about your data.

(i) Bottom line: Copilot can assist you with tasks like suggesting formulas, completing functions, and creating charts to visualize your data. However, it won't be able to completely automate complex data analysis or create custom functions.

ble in this sheet to t to see an example
-
'ou.
ake a request abou



In PowerPoint, the **Copilot** button is at the end of the Home ribbon. When you click the button, you see the **Copilot** pane:

Copilot

You can use Copilot to create a presentation or edit an existing one. Currently, Copilot in PowerPoint for "Create presentation from file" only accepts .docx (Word documents) files.

(i) Bottom line: Copilot can help you design presentations in PowerPoint by recommending slide layouts, content, and images. Don't expect it to generate the entire presentation for you, though, as the creative content will still be up to you.

lere a	re some things you can try
	Create a presentation about
ධ	Create presentation from file
	Add a slide about



The **Copilot** button is available in Outlook's left navigation pane. Once you click on the Copilot button, you will then see the following screen:

		Copilot For Microsoft 365	
	What's new? What's the latest from person , organized by emails, chats, and files?	Start the conversation Suggest common questions that can be asked to get retrospective started with my colleagues.	Track your tasks What should be on my radar from emails last week?
1	Don't miss out Summarize Teams messages where I was @mentioned this week.	Get calendar info When's my next meeting with person ?	Understand quickly Provide a comprehensive summary of my emails about [the FY24 Sales Report]
	OK, what can I help with? Try one of the	e examples or enter your own prompt.	
			🗍 View pr
Us	e / to insert people, files and more		

You will also see Copilot available when you create an email. It helps you create a draft or coaches you while creating a draft.



If you are using the **New Outlook**, you will notice more Copilot options:

- Copilot can create a summary of your email content (Summary by Copilot in the Preview pane) •
- When you're creating an email, you can type a / in the body to start Copilot
- You can change the tone and length of the email
- When you reply to an email, you will see Copilot options at the bottom of the screen

(i) Bottom line: Copilot can streamline writing emails in Outlook by suggesting greetings, closings, and even entire email bodies based on the context of your message. It won't be able to craft completely personalized emails or respond to complex queries.



NOTE: Copilot is available in both the online and desktop versions of the office apps. If you don't see the copilot buttons in your desktop version but they are in your online versions, you may need to update your desktop versions. If you still don't see the copilot buttons in your desktop apps, you will need to work with your Admin to make sure that you have the correct M365 license.



Accelebrate's Copilot for Microsoft 365 training, taught by experienced Microsoft instructors, include practical hands-on exercises and real-world demonstrations.

All Microsoft Copilot courses are live, instructor-led, and can be delivered at your site or online for your team of 3 or more.