



Copilot Essentials for MS Office

Unlock 2+ hours a week with
Copilot in Word, Excel,
Outlook, Teams & PowerPoint

- ☐ No tech skills needed
- ☐ Beginner-friendly
- ☐ Ready to use



Introduction to Microsoft Copilot

Microsoft Copilot is an AI-powered assistant built into Microsoft 365 apps like Word, Excel, Outlook, Teams, and PowerPoint. It uses advanced artificial intelligence to help you work faster and more efficiently by automating repetitive tasks, generating content, summarising information, and providing helpful suggestions—all through simple prompts or questions.

One of Copilot's greatest advantages for corporate organisations is its deep integration across the entire Microsoft 365 suite. Instead of functioning in isolation, Copilot can access and synthesise information across Word, Excel, Outlook, Teams, SharePoint, and OneDrive.

Security and Governance

Secure Environment

Because it operates within the organisation's secure Microsoft cloud environment, Copilot honours existing user permissions and governance policies.

Appropriate Access

It ensures data is accessed appropriately, with strict controls over visibility and sharing.

Privacy Protection

As a result, companies can leverage AI capabilities with confidence that their data stays private and protected.



What This Guide Covers



Comprehensive Overview

A clear overview of how Copilot works across Word, Excel, Outlook, Teams, and PowerPoint—and what's changing for day-to-day work



Content Generation

How to generate structured reports or proposals from a short prompt or bullet list—removing the need to start from a blank page



Data Analysis

How to extract insights from complex data in Excel—surfacing trends, anomalies, and summaries instantly



Content Improvement

Using Copilot to identify what's missing from your communication—based on how others are likely to read it



Core Features

The core features: drafting, rewriting, summarising, transforming content, and generating charts—explained with practical, step-by-step use cases



Workflow Integration

Integrating content from emails, calendars, and shared files securely without leaving your workflow



Presentation Creation

Turning Word documents into professional presentations—reducing preparation time without sacrificing quality



Meeting Management

Working with summaries, action items, and meeting recaps in Teams

What You'll Learn

| Tool | What You'll Learn |
|------------|--|
| Word | Draft full documents from a prompt, rewrite for tone or clarity, summarise content |
| Excel | Generate formulas, visualise data, analyse trends and outliers, explain insights |
| Outlook | Draft emails, summarise threads, prioritise messages, prepare agendas |
| Teams | Transcribe meetings, generate summaries, extract decisions and action items |
| PowerPoint | Create slide decks from Word docs or prompts, rewrite slide text, improve layout |
| All Tools | Use prompts effectively, integrate across apps, stay compliant with data policies |



Getting Started: Using Copilot in Microsoft 365



Accessing Copilot

Look for the Copilot icon on the toolbar or ribbon in your Microsoft 365 app. Click it to open the Copilot panel.



Writing Prompts

You can interact with Copilot either by typing requests in its chat interface or by using built-in buttons that appear in context—such as "Summarise" or "Rewrite" in Outlook.



Work Vs Internet mode

Copilot can operate in two modes depending on your organisation's settings. Copilot searches across your company's data—emails, files, chats, and meetings—to provide accurate, relevant responses. If enabled, it can also connect to the internet to retrieve up-to-date external information. However, most companies at the time of writing choose to disable internet access to ensure data security and prevent corporate information from contributing to model training outside their environment.



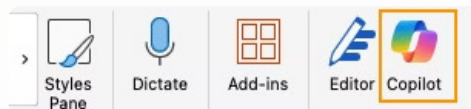
Microsoft Word: Copilot Essentials

There are three main ways to activate it Copilot in Word

1

Copilot Icon on the Ribbon

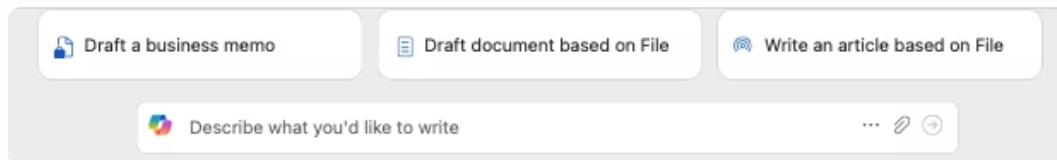
You'll find the Copilot icon on the top ribbon. Clicking this opens the Copilot side panel.



2

First time access

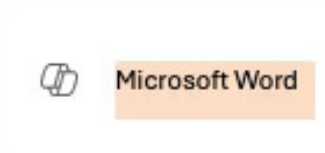
When you open word file for the first time, it will provide ready to use suggestions to simplify the workflow



3

Context Menus

When you highlight text, right-clicking may reveal options like "Copilot Suggestions," allowing quick access to rewriting and tone adjustments.





Top 5 Word Copilot Features

| Feature | What It Does | Step-by-Step How-To |
|---------------------|---|---|
| Draft Content | Generates new text, reports, or letters from a prompt | <ol style="list-style-type: none">1. Open Word and click the Copilot icon or use a shortcut.2. Type your prompt, e.g., "Draft a letter to HR about annual leave."3. Review and edit the generated text. |
| Rewrite & Reword | Improves clarity, tone, or rewrites sections | <ol style="list-style-type: none">1. Highlight the text.2. Right-click and select "Copilot Suggestions."3. Choose "Rewrite" and select a preferred tone or style. |
| Summarize Documents | Creates a summary of long documents | <ol style="list-style-type: none">1. Open the document.2. Click Copilot.3. Type "Summarize this document." 4. Review the summary provided. |
| Transform Content | Converts lists or paragraphs into tables or bullet points | <ol style="list-style-type: none">1. Highlight the content.2. Ask Copilot, "Turn this into a table."3. Adjust the formatting if needed. |
| Chat with Copilot | Ask questions about your document | <ol style="list-style-type: none">1. Click Copilot.2. Type a question like "What are the main points in this document?"3. Review the response provided in real time. |



Word Copilot Example Use Case



Start with a prompt

Create a 3-page document covering these five points: [list your topics]. Ensure the tone is professional and the structure is logical, with headings and subheadings.



Refine the draft

Once the draft is ready, you can refine the language or rearrange content as needed.

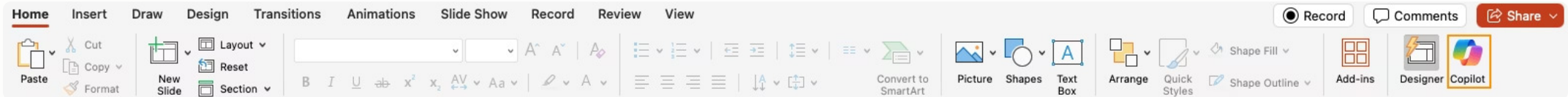


Identify blind spots

Ask: "What important questions might a reader have after reading this document that I haven't addressed?"

Microsoft Excel: Essential Copilot Features

Copilot in Excel can be found on the ribbon: Locate the icon in the top toolbar. Clicking it opens the Copilot side panel. Here you can type prompts to enable power of copilot for Excel.



| Feature | What It Does | Step-by-Step How-To |
|-------------------------------|--|--|
| Generate Insights | Finds trends and creates charts or PivotTables | <ol style="list-style-type: none">1. Open Excel and click Copilot.2. Type, "Analyze this data and create a chart."3. Review suggested charts |
| Suggest Formulas | Recommends and builds formulas for your needs | <ol style="list-style-type: none">1. Select your data.2. Ask Copilot, "Suggest a formula to calculate total sales."3. Insert the suggested formula |
| Create Conditional Formatting | Highlights data based on rules | <ol style="list-style-type: none">1. Select your data.2. Ask Copilot, "Highlight sales above \$10,000."3. Apply the formatting Copilot suggests |
| Automatic Sorting | Organizes data as you request | <ol style="list-style-type: none">1. Select your table.2. Ask Copilot, "Sort this list by date, newest to oldest."3. Data is sorted instantly |
| Explain Data | Answers questions about your spreadsheet | <ol style="list-style-type: none">1. Click Copilot.2. Type, "What are the top 3 selling products?"3. Copilot provides the answer |



Excel Copilot Example Use Case

Start with your dataset

You're handed a dataset with hundreds of rows—product names, regions, dates, and revenue.



Review generated insights

Copilot creates charts and highlights key patterns in your data.



Ask for analysis

"Please analyse this dataset. Identify any major sales trends, flag any regions underperforming, and generate a chart showing sales growth over the past three months."



Ask for anomalies

"Are there any anomalies, gaps, or patterns in this data I should be aware of before presenting it?"



Microsoft Outlook: Essential Copilot Features

Drafting and Refining Emails

Copilot can help you write new emails, rewrite existing drafts, or enhance your messages for clarity, tone, and professionalism.

Summarizing Email Threads

Copilot can quickly summarize long or complex email conversations, highlighting key points, decisions, and action items.

Prioritizing Your Inbox

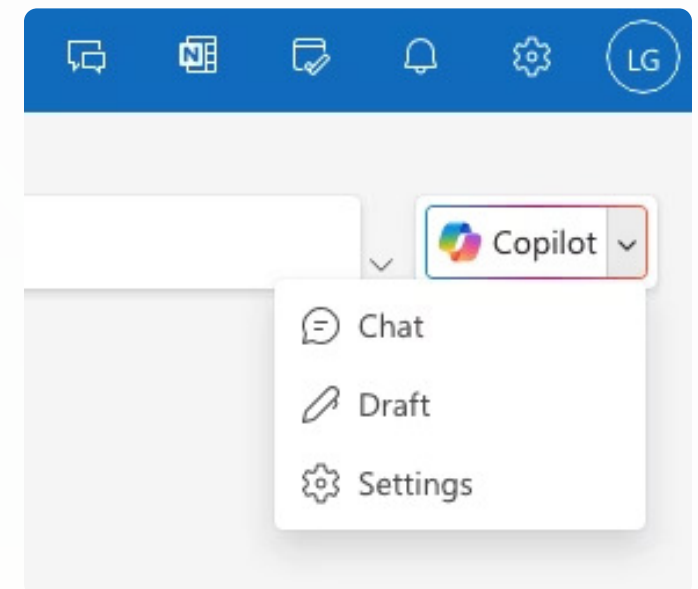
Copilot can help you focus on what matters by identifying high-priority emails, surfacing urgent messages, and suggesting which emails to address first.

Agenda Drafting

Copilot can draft meeting agendas, summarize key points from previous meetings, and help you prepare for upcoming events.

Copilot Chat

Copilot Chat lets you interact with Copilot directly in Outlook to ask questions, get insights, or schedule meetings using natural language.





How to Use Outlook Copilot Features



Drafting and Refining Emails

Start a new email or open an existing draft in Outlook. Click the Copilot icon in the toolbar. Enter a prompt such as "Draft an email to schedule a meeting with my team" or select text and ask Copilot to "Rewrite" or "Make more concise." Review Copilot's suggestions and insert them into your email with a click.



Summarizing Email Threads

Open an email thread you want to summarize. Click the Copilot icon and ask, "Summarize this conversation." Copilot will generate a concise summary you can review or share.



Prioritizing Your Inbox

Go to your Outlook inbox. Click the Copilot icon and prompt, "Show me my most important emails" or "Which emails need my attention today?" Copilot will highlight priority emails and suggest actions.

 **Stay on top**

Summarize recent emails where I was @mentioned

 **Understand**

Help me learn more about [topic]

 **Get tips**

Get tips for writing an email request for a proposal

 **Chat history**

Describe what you'd like to do or type / to reference emails, people and more





More Outlook Copilot Features

Agenda Drafting and Meeting Preparation

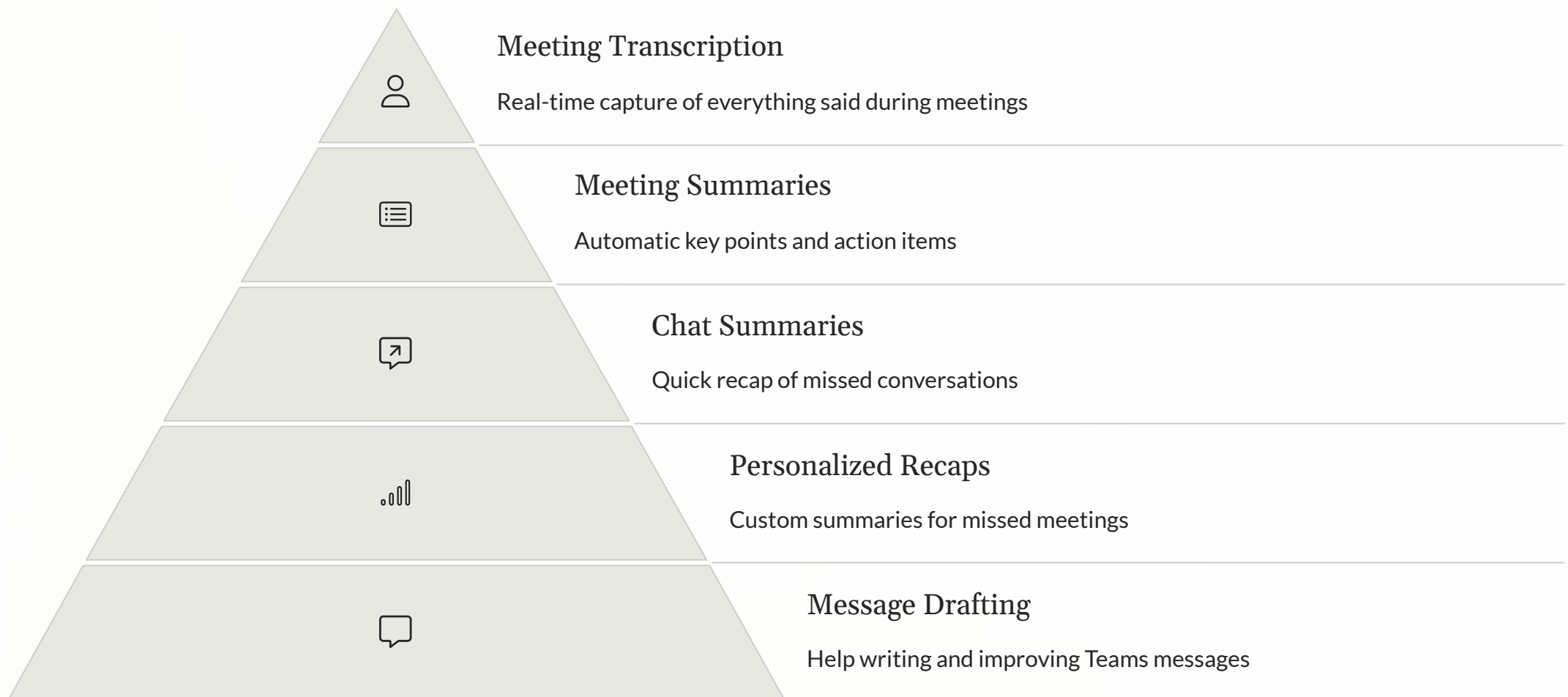
Open your calendar or a meeting invitation in Outlook. Click the Copilot icon and ask, "Draft an agenda for this meeting" or "Summarize key points from last week's meeting." Copilot will generate an agenda or summary you can use or share.

Copilot Chat for Quick Insights and Scheduling

Click the Copilot Chat module in Outlook. Type your question or request, such as "Find emails from my manager about the project" or "Book focus time tomorrow morning." Copilot responds instantly, helping you take action or find information without leaving Outlook.



Microsoft Teams: Essential Copilot Features





How to Use Teams Copilot Features

Meeting Transcription

When you join or start a Teams meeting, click the More (three dots) menu. Select Start transcription. This will also enable Copilot features for the meeting. The transcript appears alongside the meeting video/audio in real time. After the meeting, you can access the transcript in the meeting chat or Recap tab. Only organizers, co-organizers, or presenters (depending on permissions) can start/stop transcription.



Meeting Summaries and Action Items

Ensure transcription is enabled. After the meeting, open the meeting chat or Recap tab. Copilot's summary and action items will be available for you to review, copy, or assign.

Chat and Channel Conversation Summaries

Open any chat or Teams channel. Click the Copilot icon (or use the Copilot prompt box). Ask Copilot to "Summarize this conversation" or "What did I miss?" and it will generate a concise summary.



Personalized Recaps for Missed Meetings

After the meeting, open the meeting chat or Recap tab. Ask Copilot for a recap, such as "What did I miss?" or "What was assigned to me?"



Microsoft PowerPoint: Essential Copilot Features

Create a Presentation from a Prompt

Copilot can build an entire presentation for you from just a simple description or outline. This feature saves hours of work and helps you get started quickly.

Turn Word Documents into Presentations

Copilot can instantly convert a Word document into a PowerPoint presentation, extracting key points and formatting them into slides.

Rewrite and Improve Slide Content

Copilot can help you rewrite slide text to be clearer, more concise, or more engaging. It can also adjust the tone (formal, friendly, etc.).

Summarize Slides or Presentations

If you have a long or complex presentation, Copilot can quickly generate a summary of the key points, either for a single slide or the whole deck.

Design and Visual Suggestions

Copilot can recommend layouts, images, icons, and design themes to make your presentation look professional and visually appealing.



How to Use PowerPoint Copilot Features



Create a Presentation from a Prompt

Open PowerPoint and click the Copilot button. In the prompt box, type what you want (e.g., "Create a 5-slide presentation about climate change for beginners"). Copilot will generate slides with suggested content, images, and layouts. Review and edit as needed.



Turn Word Documents into Presentations

Open PowerPoint and click the Copilot button. Select the option to "Create presentation from a file." Upload your Word document. Copilot will generate slides based on the document's content. Edit and customize as needed.



Rewrite and Improve Slide Content

Select the text box or content you want to improve. Click the Copilot icon or right-click and choose "Rewrite with Copilot." Choose from suggested rewrites or ask for a specific tone. Replace your original text with the improved version.

Conclusion



Transforming Work

Microsoft Copilot is transforming the way we work by making powerful AI tools accessible to everyone. With features like meeting transcription, automatic summaries, content generation, and smart design suggestions, Copilot helps you save time, stay organized, and create more impactful presentations and communications.



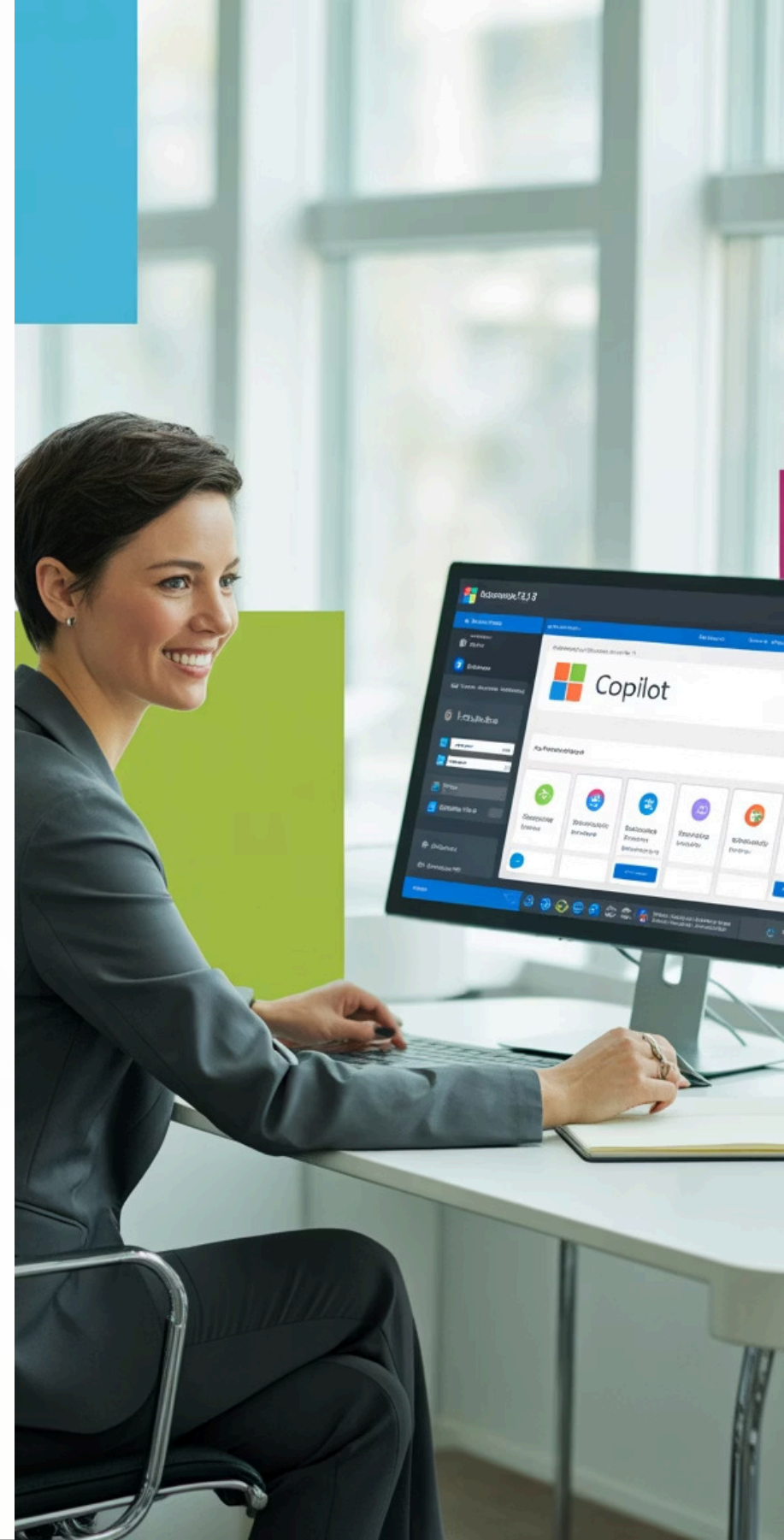
Focus on What Matters

Embrace these tools, experiment with the features, and let Copilot handle the busywork-so you can focus on what matters most.



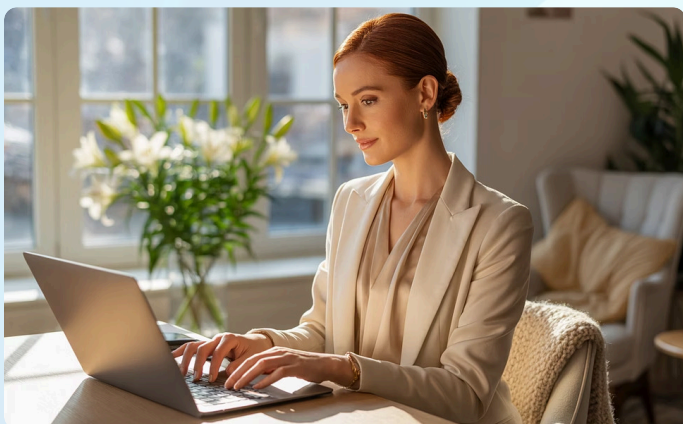
Simple Steps

By following the simple steps outlined in this guide, you can start using Copilot's top features right away to boost your productivity and confidence. As you become more familiar with Copilot, you'll discover even more ways it can streamline your workflow and enhance your collaboration.



Moving Forward with Confidence

The features outlined in this guide are designed to help you work more efficiently, communicate more clearly, and reduce manual effort across Microsoft 365.



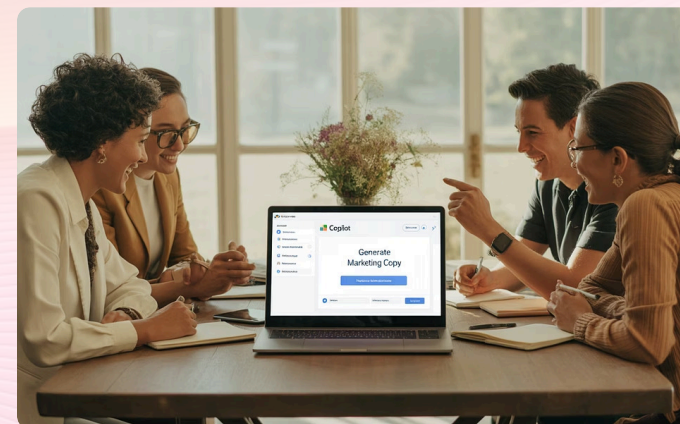
Start Simple

You don't need technical expertise to begin—just a willingness to adapt how you use familiar tools.



See Measurable Results

Small changes in how you draft, analyze, and present can lead to measurable gains in productivity.



Integrate Daily

Start applying what you've learned. The sooner you integrate Copilot into your daily workflow, the faster you'll see real results.