Smart Dolphins

Microsoft Copilot 365

And ChatGPT

March 2025

VIRTUAL
training co

Microsoft Copilot and ChatGPT

Both Copilot and ChatGPT are LLMs (large language models), but they aren't built on the same technology.

That said, Microsoft allows users to access ChatGPT-4 Turbo technology through Copilot in addition to using Copilot's native LLM technology. Microsoft and OpenAI have an official business relationship, and as Microsoft puts it, the two companies "are working together to develop the underlying AI. Microsoft is developing and providing the supercomputing infrastructure that OpenAI services run on."

For many use cases, Copilot and ChatGPT behave similarly. However, they're actually very different products. ChatGPT is a more generic tool with access to public data, while Copilot is designed to work securely with your company's proprietary data.

Copilot vs. ChatGPT: The Basics

Copilot and ChatGPT are superficially similar in one regard. As LLMs, they both operate on written prompts and produce written results.

However, that's where the similarity ends. From datasets covered to use cases and more, these two AIs are vastly different.

In a nutshell, Microsoft has taken their AI engine and wrapped it around SharePoint, OneDrive, and the rest of Microsoft 365. The result works like a personal assistant that understands all proprietary organizational data to which it has access. It's so good, you may want to help your personal assistant find a new career.

Both Copilot and ChatGPT are available in several different versions—some free, some paid.

While ChatGPT can also function as a personal assistant, there's one huge difference: ChatGPT doesn't (or shouldn't) have access to your organization's internal data.

Copilot and ChatGPT use wildly different datasets

ChatGPT's answers reflect the dataset on which it's been trained. By definition, none of your organization's internal data makes it into that dataset—at least we hope it doesn't. If it does, you have a larger problem, which we'll cover when we get to cybersecurity (#6 below).

In contrast, Copilot is fully integrated into your Microsoft 365 environment. It works within the sphere of your internal data, and it can give context-specific answers that apply to your operations. This has profound implications for use cases, cybersecurity, and copyright considerations, which we'll explore in a moment.

Copilot beats ChatGPT for both internal and external operations

Microsoft Copilot Business Use Cases

As an integrated Microsoft product, Copilot is incredibly versatile. It has too many use cases to cover them all here. For a larger overview, **check out this page from Microsoft**. Click on every Microsoft application logo to see what Copilot can do in different contexts.

That said, here are a few easy ways to use Copilot to improve productivity in day-to-day work.

- **Drafting an important email or document.** Like ChatGPT, Copilot can produce written communications for you. If it's tough to wrap your mind around the main points you should cover, Copilot can write for you.
- **Finding files after consolidation in SharePoint and OneDrive.** For organizations that still use shared folders and mapped network drives, it's stressful to imagine the move to cloud storage. People worry that they won't be able to find their files. While it might sound crazy, your team actually won't need to know where their files are. Copilot can find files with simple, natural-language prompts.
- **Getting the important points from a Teams chat.** Let's be honest, instant messaging has its place, but it can also bury important information as new things come up. Copilot can read chats for you, detect action items, and summarize what you need to know in a few bullets.
- **Summarizing an email chain (and what the team needs from you).** Let's say your boss sends you an email about the budget, referencing other email chains as well as Teams chats on the subject. Copilot can summarize the situation for you and explain in plain language what your boss is looking for.

Note that ChatGPT can't access any of your organization's proprietary data. Using ChatGPT securely will place a significant limit on what the AI can do to interpret internal data and advise on operations, whether internal or external.

Common Use Cases for ChatGPT

- **Producing written content,** provided: 1) you're not including sensitive information in the prompt, 2) you don't mind the fact that other ChatGPT users could generate the same content that the AI is giving you, 3) you don't mind the fact that you don't own the copyright for the output content, and 4) someone else may already own the copyright for the output content.
- **Writing basic code.** ChatGPT can help developers solve coding problems, although its output may not be optimized or even accurate. Also consider the fact that code can be copyrighted.
- **Generating customer service responses, including translation into different languages.** ChatGPT excels at helping customer service agents respond to communications quickly while maintaining a positive, professional voice. The application can also translate written content to assist with cross-language customer support.

This list is by no means exhaustive. However, you can see the difference in the use cases. ChatGPT can't (or *shouldn't*) function as a personal assistant with access to your organization's proprietary information. Microsoft Copilot is designed to work this way while protecting your information.
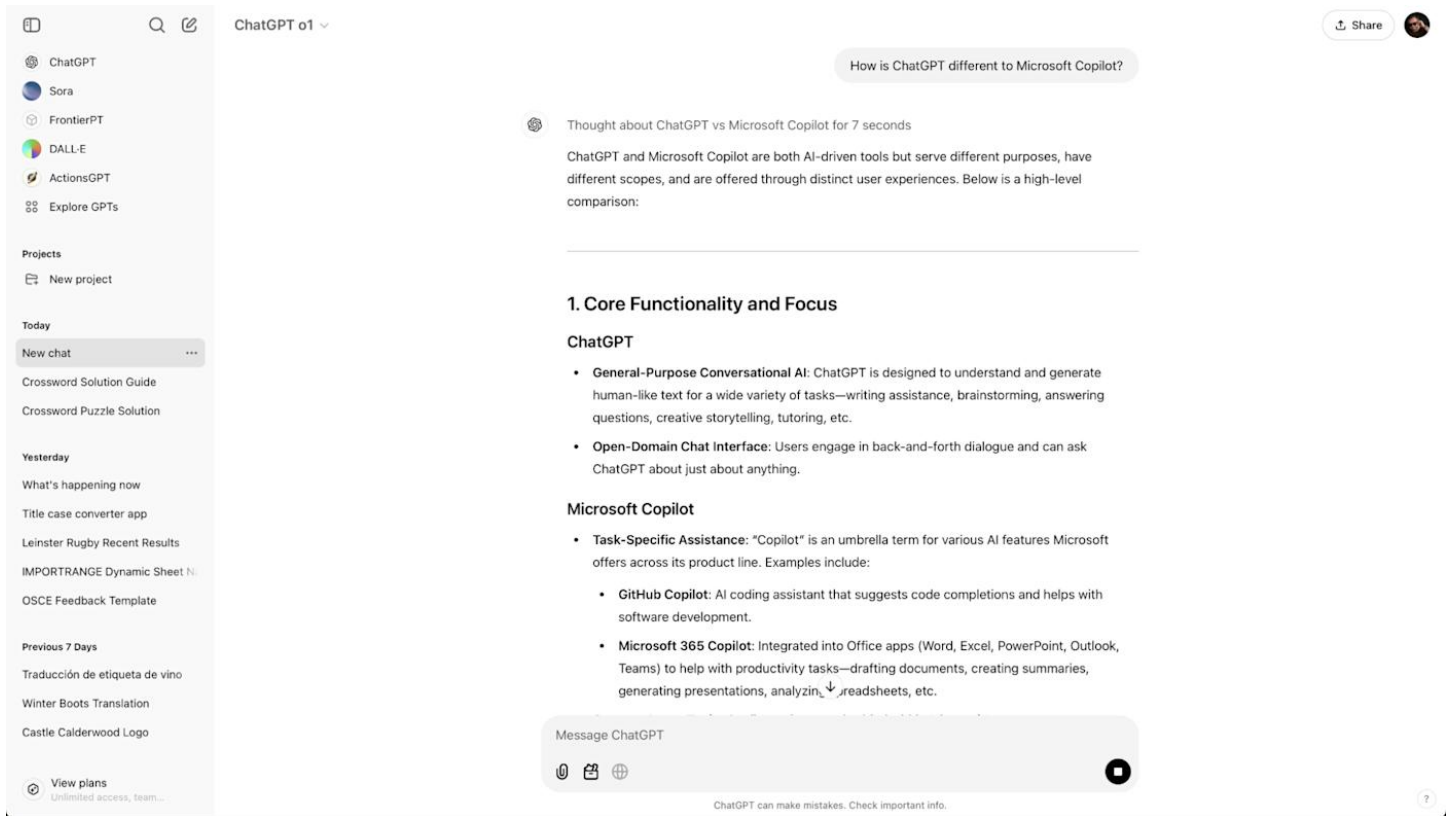
ChatGPT And Copilot Are Really Similar

Before diving into the *differences* between ChatGPT and Copilot, let's look at all the major ways in which they're actually really similar. They're both AI-powered productivity chatbots, and that alone means there's a lot of overlap.
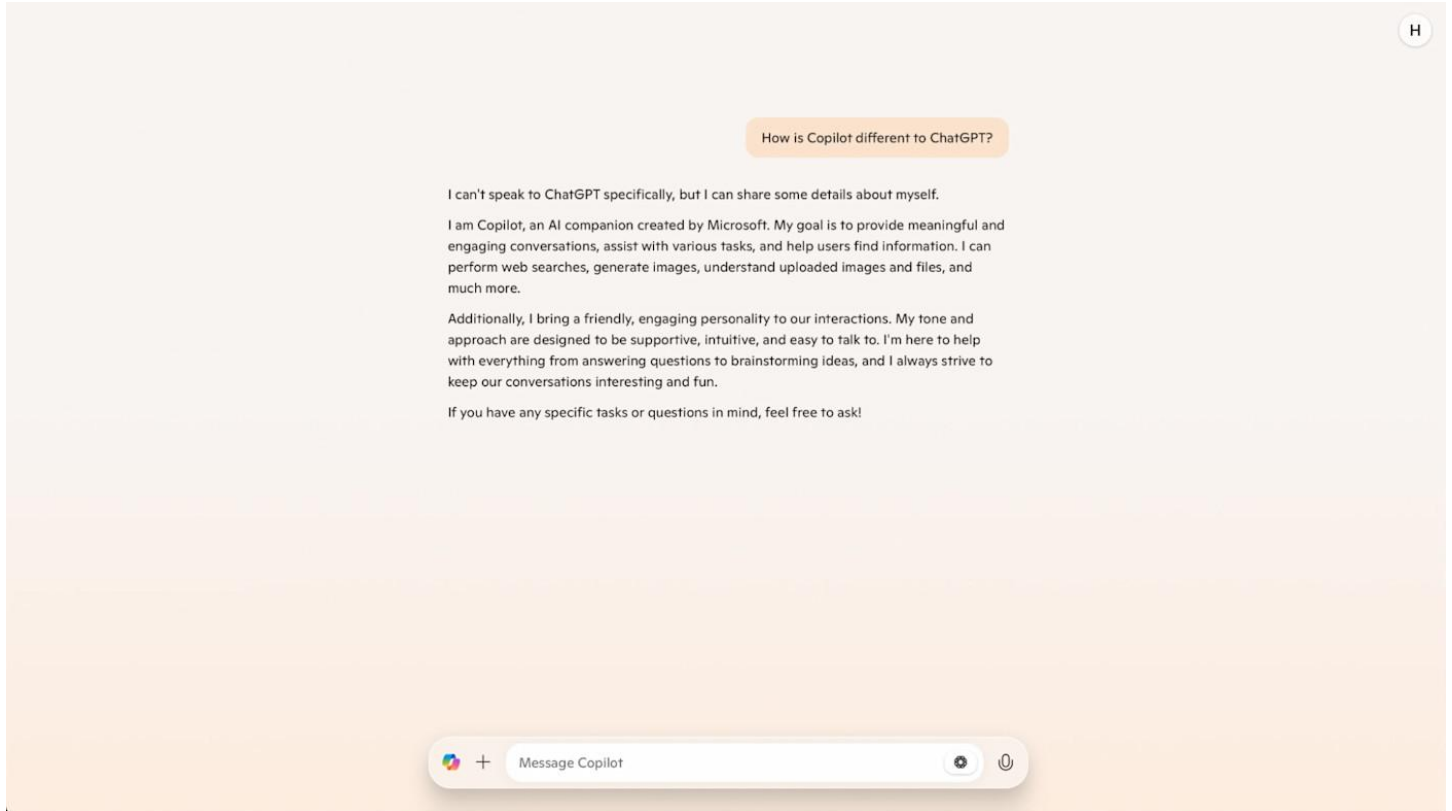
Microsoft Copilot

ChatGPT

- **Both can understand and generate text, images, code, documents, and more**. These are both multimodal chatbots, so if there's a feature you associate with AI chatbots, they almost certainly have it.

- **Both use the latest AI models from OpenAI**. As I write this, that's the GPT-4o and o1 series of models. Microsoft also claims to use its own proprietary models, but given that it's a major investor in OpenAI and the feature overlap is so extreme, it's safe to assume that OpenAI's state-of-the-art models are doing a lot of the heavy lifting.

- **Both are available on the web and through mobile apps**. I'll get into this a little more in a bit, but you can essentially use either chatbot on any device.

- **Both apps can search the web for new information**. Gone are the days where different AI tools had different knowledge cutoff dates that affected their answers. Both ChatGPT and Copilot can pull in information from the open internet.

- **You have to pay to get the best from both apps**. While both apps have free versions, using the best and most powerful features requires you to pay upwards of $20/month.

Copilot And ChatGPT Have Similar Pricing

Microsoft Copilot 365 and ChatGPT

Both Microsoft and OpenAI have evolved their offerings to fit business vs. personal use cases, as well as different team sizes in a business scenario. Looking at pricing alone, the two tools appear to be very similar—but remember everything else we've covered so far. The tools are very different, though their tiers are priced similarly.

	Microsoft Copilot	**ChatGPT**
Free version	Copilot Free	ChatGPT Free
Paid version	Copilot Pro ($20/mo.)	ChatGPT Plus ($20/mo.)
Business version	Copilot for Microsoft 365 Business ($30/mo.)	ChatGPT Team ($25-30/mo.)
Enterprise version	Copilot for Microsoft 365 Enterprise ($30/mo.)	Chat GPT Enterprise (quote required)

Pricing/Plan Websites

[Your AI Assistant for Work | Microsoft 365 Copilot](#)

[ChatGPT Pricing | OpenAI](#)

Differences in Copilot and ChatGPT

ChatGPT and Microsoft Copilot are both powerful AI tools, but they serve different purposes and have distinct features:

ChatGPT:

- **Conversational AI**: ChatGPT excels in generating human-like responses, making it ideal for interactive conversations, brainstorming, and creative writing.

- **Versatility**: It can be used for a wide range of tasks, from answering questions to generating code, creating art, and more.

- **Accessibility**: Available on multiple platforms, including mobile and desktop, and supports voice conversations and image inputs.

- **Advanced Language Models**: Powered by GPT-4 and GPT-4o, ChatGPT offers nuanced and accurate responses.

Microsoft Copilot:

- **Productivity Integration**: Copilot is integrated into Microsoft 365 apps like Word, Excel, and Teams, enhancing workflows and collaboration.

- **Task Automation**: Automates repetitive tasks, summarizes content, and offers intelligent suggestions to streamline work.

- **Document Management**: Helps with drafting emails, rewriting paragraphs, summarizing documents, and analyzing data.

- **Collaboration Features**: Supports real-time co-authoring, meeting summaries, and task management within the Microsoft ecosystem.

Key Differences:
- **Primary Use Cases**: ChatGPT is more focused on conversational interactions and creative tasks, while Copilot is tailored for productivity and collaboration within Microsoft 365.

- **Integration**: Copilot is deeply integrated into Microsoft tools, providing seamless transitions between apps like Word, Excel, and Teams. ChatGPT, on the other hand, is a standalone conversational AI that can be accessed across various platforms.

- **Customization**: Copilot offers features like adaptive learning and customizable interfaces to tailor the user experience[2]. ChatGPT provides advanced language processing for more intuitive and dynamic conversations.

Both tools are designed to enhance productivity and creativity, but the best choice depends on your specific needs and preferences.

Choosing between ChatGPT and Microsoft Copilot

Choosing between ChatGPT and Microsoft Copilot for your work depends on your specific needs and the nature of your tasks. Here are some considerations to help you decide:

When to Use ChatGPT:

- **Creative Tasks**: If your work involves creative writing, brainstorming ideas, or generating content, ChatGPT's conversational abilities and advanced language models can be very helpful.

- **Versatile Interactions**: For tasks that require a wide range of interactions, such as answering questions, coding assistance, or even casual conversations, ChatGPT is a great choice.

- **Accessibility**: If you need an AI tool that you can use across multiple platforms, including mobile and desktop, and supports voice and image inputs, ChatGPT offers this flexibility.

When to Use Microsoft Copilot:

- **Productivity and Collaboration**: If your work involves a lot of document management, data analysis, or collaboration within the Microsoft 365 ecosystem (Word, Excel, Teams, etc.), Copilot is designed to enhance these workflows.

- **Task Automation**: For automating repetitive tasks, summarizing content, and generating insights from documents, Copilot's integration with Microsoft 365 apps can save you a lot of time.

- **Seamless Integration**: If you already use Microsoft 365 tools extensively, Copilot's seamless integration will provide a more cohesive and efficient experience.

Key Considerations:

- **Nature of Tasks**: Assess whether your tasks are more creative and conversational (ChatGPT) or productivity-focused and collaborative (Copilot).

- **Tool Integration**: Consider how well each tool integrates with your existing workflow and tools.

- **Specific Features**: Identify the specific features you need, such as real-time co-authoring, document summarization, or advanced language processing.

Ultimately, you might find that using both tools in tandem can provide the best of both worlds, leveraging ChatGPT for creative and versatile tasks and Copilot for productivity and collaboration within Microsoft 365.

Microsoft Copilot requires more preparation, but that's a good thing
ChatGPT isn't integrated into Microsoft 365 by default. It runs on public data, and it shouldn't have access to your private data in M365. This means you can start using ChatGPT right away—without cleaning up your organization's data.

Microsoft Copilot is different. Since it's deeply integrated into your Microsoft 365 environment, you won't get the most out of the tool if you simply turn it on.

Naturally, since Copilot is deeply integrated into your organization, your teams can get more out of it than ChatGPT. With the right preparation, Copilot becomes an AI that knows your company rather than a generic AI.

While Copilot requires more preparation than ChatGPT, think of it this way. Because Copilot is deeply embedded into your Microsoft environment, you're actually getting much more out of the tool than ChatGPT can provide. You get what you pay for in terms of preparation, training, and data readiness.

- [**ChatGPT pricing**](#).

- [**Microsoft Copilot pricing for M365**](#).

Copilot vs. ChatGPT: The takeaway

For Microsoft customers, there's really no contest. Copilot beats ChatGPT any day, on any task.

Why? Because Copilot protects your organization's proprietary data *and* offers context-specific results based on that data. You just can't get that one-two punch from ChatGPT.

ChatGPT

ChatGPT is an artificial intelligence language model developed by OpenAI, leveraging the GPT (Generative Pre-trained Transformer) architecture to understand and generate text that is indistinguishable from that produced by a human. It's trained on a vast corpus of text data, enabling it to comprehend context, answer questions, compose essays, craft creative stories, provide explanations, and even simulate specific writing styles.
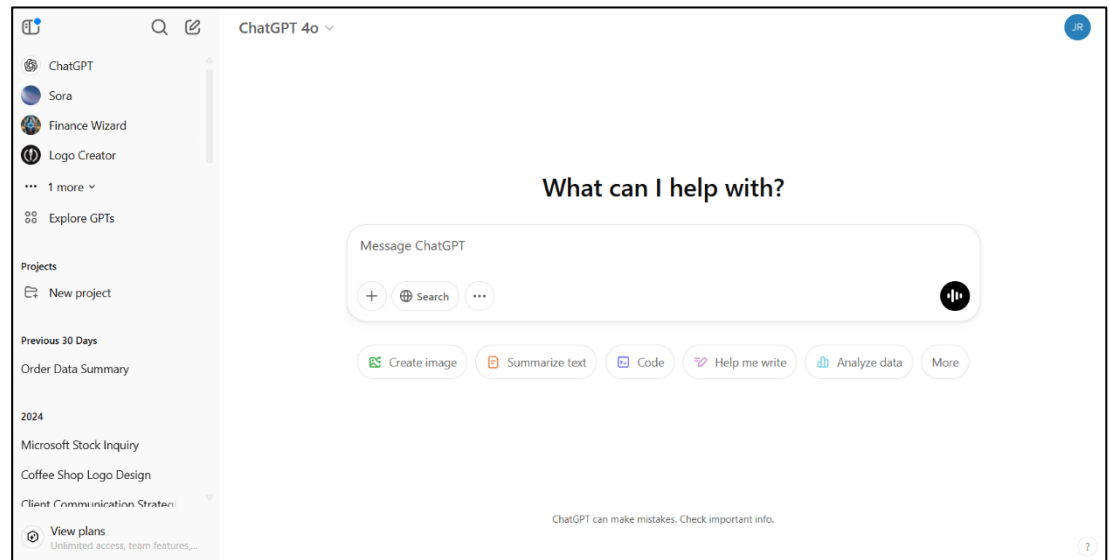
How to Access ChatGPT?

The address for ChatGPT is **chatgpt.com**.

If you have an account already created, log in.

Using ChatGPT

Projects in ChatGPT

Projects in ChatGPT are a fantastic way to organize and manage your work, especially if it involves multiple conversations or files. Here are some key features of Projects:

- **Grouping Conversations**: You can group related chats together, making it easier to keep track of ongoing discussions and reference past conversations.

- **File Management**: Projects allow you to upload and manage files within the context of your project, so all relevant documents are easily accessible.
- **Custom Instructions**: You can set specific instructions for each project, tailoring how ChatGPT interacts with you based on the project's needs.
- **Shared Context**: Projects support shared context, meaning ChatGPT can remember details across different conversations within the same project, providing more coherent and relevant responses.

This feature is designed to enhance productivity and streamline workflows, making it easier to handle complex tasks.

- ChatGPT projects organize chats and offer project-specific custom instructions.
- Projects allow you to upload files accessible to all chats within the project.
- Projects are available for Plus, Team, and Pro users, but not for Free users.

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Create a Project

Creating a project in ChatGPT is straightforward. Here are the steps to get you started:

1. **Open ChatGPT**: Log in to your ChatGPT account.
2. **Navigate to Projects**: Look for the "Projects" tab or section in the interface. This might be in the main menu or a sidebar, depending on your interface layout.
3. **Create a New Project**: Click on the "New Project" button. You may be prompted to name your project and provide a brief description.
4. **Add Conversations and Files**: Once your project is created, you can start adding relevant conversations and files. There should be options to upload documents and link existing chats to your project.
5. **Set Custom Instructions**: If needed, you can set specific instructions for how ChatGPT should interact within this project. This can help tailor responses to the project's requirements.
6. **Manage Your Project**: Use the project dashboard to manage your conversations, files, and settings. You can add or remove items as your project evolves.

Feel free to explore the interface and customize your project as needed.

Edit or Delete a Project

From the menu at the top right, you can access the Edit Project Name and Delete Project options.
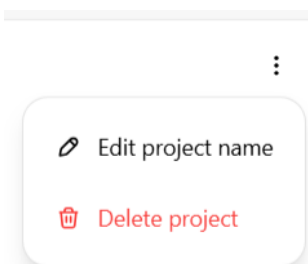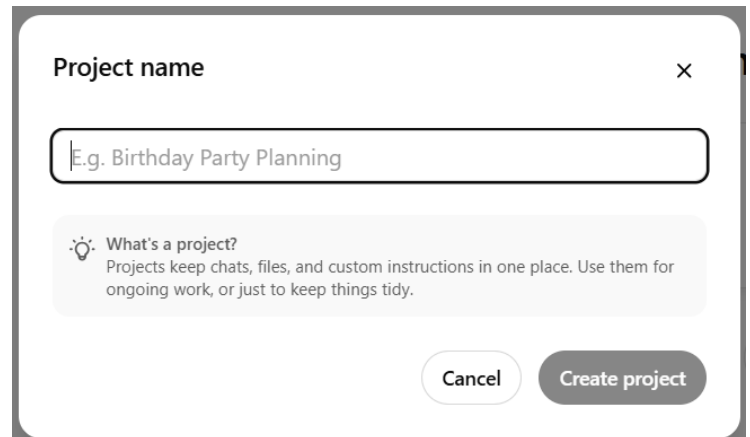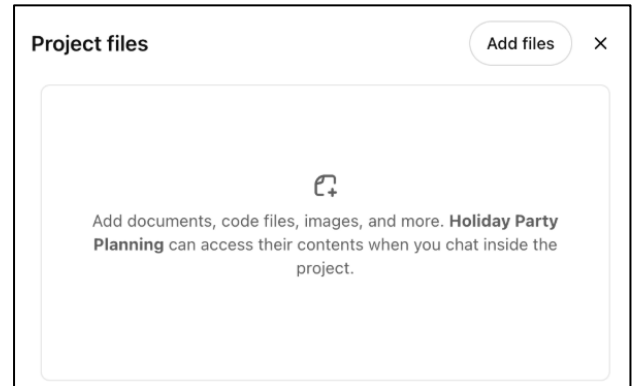
Also, if you use the Navigation pane on the left side of the window, you can go to the name of the Project and click the menu to access these options.

Collaborating on projects can enhance productivity and bring diverse perspectives to your work.
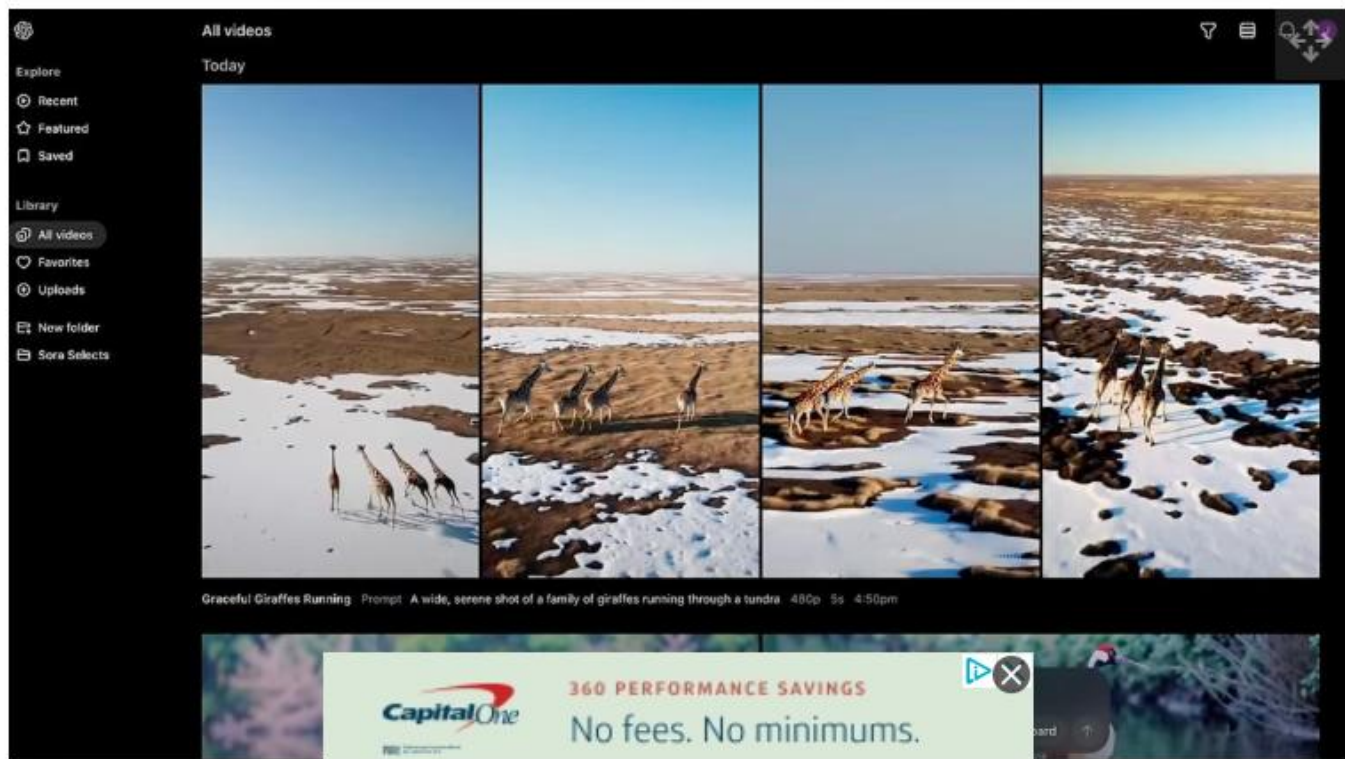

Sora in ChatGPT

Sora is generative AI video software created by OpenAI, the same company behind ChatGPT and DALL•E. In its simplest terms, Sora uses generative AI to create videos from scratch. Sora can create video clips from a simple text prompt, much like DALL•E can create images from text prompts.

- Sora, is a text-to-video model. Sora can generate videos up to a minute long while maintaining visual quality and adherence to the user's prompt.
- Sora is able to generate complex scenes with multiple characters, specific types of motion, and accurate details of the subject and background. The model understands not only what the user has asked for in the prompt, but also how those things exist in the physical world.

Sora could be considered the DALL•E for video. Sora is generative AI video software created by OpenAI, the same company behind ChatGPT and DALL•E. In its simplest terms, Sora uses generative AI to create videos from scratch.

What's a "Temporary chat"?

With Temporary Chat, you can have a conversation with a blank slate. ChatGPT won't be aware of previous conversations or access memories. It will still follow your custom instructions if they're enabled.

Using GPT's

GPTs are a new way for anyone to create a tailored version of ChatGPT to be more helpful in their daily life, at specific tasks, at work, or at home—and then share that creation with others. For example, GPTs can help you learn the rules to any board game, help teach your kids math, or design stickers.

How to Access GPT's in ChatGPT?

While using ChatGPT, you can click the Explore GPT's icon from the navigation pane on the left. This will open the GPT options.

"Discover and create custom versions of ChatGPT that combine instructions, extra knowledge, and any combination of skills."

Visit chatgpt.com/gpts(opens in a new window) to explore.

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You can search for the name of a GPT you want to see or you can browse the categories listed across the top.

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By jobright.ai

Universal Primer
The fastest way to learn anything hard.
By Siqi Chen

Copilot in Microsoft 365

Microsoft Copilot for Microsoft 365 is an AI-powered productivity tool that coordinates large language models (LLMs), content in Microsoft Graph, and the Microsoft 365 apps that you use every day, such as Word, Excel, PowerPoint, Outlook, Teams, and others. This integration provides real-time intelligent assistance, enabling users to enhance their creativity, productivity, and skills.

Copilot for Microsoft 365 uses a combination of LLMs, a type of artificial intelligence (AI) algorithm that uses deep learning techniques and vast data sets to understand, summarize, predict, and generate content. These LLMs include pre-trained models, such as Generative Pre-Trained Transformers (GPT) like GPT-4, designed to excel in these tasks.

Microsoft 365 apps (such as Word, Excel, PowerPoint, Outlook, Teams, loop, and more) operate with Copilot to support users in the context of their work. Some of these features are detailed in the following table:

Microsoft 365 App	Feature	Description
Word	Draft with Copilot	Generate text with and without formatting in new or existing documents. Word files can also be used for grounding data
	Chat	Create content, summarize, ask questions about your document, and do light commanding via Chat.
PowerPoint	Draft with Copilot	Create a new presentation from a prompt or Word file, leveraging enterprise templates. PowerPoint files can also be used for grounding data
	Chat	Summary and Q&A
	Light commanding	Add slides, pictures, or make deck-wide formatting changes.
Loop	Collaborative content creation	Create content that can be collaboratively improved through direct editing or refinement by Copilot.
Outlook	Coaching tips	Get coaching tips and suggestions on clarity, sentiment, and tone, along with an overall message assessment and suggestions for improvement.
	Summarize	Summarize an email thread to help the user quickly understand the discussion.
	Draft with Copilot	Pull from other emails or content across Microsoft 365 that the user already has access to.
Teams	Chat	Users can invoke Copilot in any chat. Copilot can summarize up to 30 days of the chat content prior to the last message in a given chat. Copilot uses only the single chat thread as source content for responses and can't reference other chats or data types (for example, meeting transcripts, emails, and files). Users can interact with Copilot by selecting pre-written prompts or writing their own questions. Responses include clickable citations that direct users to the relevant source content that was used. Conversations with Copilot take place in a side panel that allows users to copy and paste. Copilot conversations will disappear after the side panel is closed.
	Meetings	Users can invoke Copilot in meetings or calls within the same tenant. Copilot will use the transcript in real-time to answer questions from the user. It only uses the transcript and

Microsoft 365 App	Feature	Description
		knows the name of the user typing the question. The user can type any question or use pre-determined prompts; however, Copilot will only answer questions related to the meeting conversation from the transcript. The user can copy/paste an answer and access Copilot after the meeting ends on the Recap page.
	Copilot	Allows users to access data across their Microsoft 365 Graph and leverage LLM functionality. Copilot can be accessed in Teams and when signed-in to Bing with an active directory account.
	Calls	Copilot in Teams Phone uses the power of AI to empower you to work more flexibly and intelligently, automating important administrative tasks of a call, such as capturing key points, task owners, and next steps, so you can stay focused on the discussion. Copilot in Teams Phone supports both voice over Internet Protocol (VoIP) and public switched telephone network (PSTN) calls.
	Whiteboard	Makes meetings and brainstorm sessions more creative and effective. Use natural language to ask Copilot to generate ideas, organize ideas into themes, create designs that bring ideas to life and summarize whiteboard content.
OneNote	Draft with Copilot	Use prompts to draft plans, generate ideas, create lists, and organize information to help you easily find what you need.
Forms	Draft with Copilot	Use prompts to draft questions and suggestions that help you create surveys, polls, and other forms with ease.

Versions of Copilot

Currently, Microsoft offers five distinct versions of Copilot: The free version, Copilot Pro, Copilot 365, Copilot Finance and Copilot Security. Each version comes with its own set of features, capabilities and pricing structures.

Free Microsoft Copilot

The free version of Microsoft Copilot is accessible to anyone using Windows, Microsoft Edge or the Bing website. This version pulls data from Bing searches and other aggregated information tracked by Microsoft to generate responses to user queries. While it can provide answers to general questions, it may not always deliver specific or detailed information.

Key features:

- No cost to use.
- Ideal for general users and small businesses.
- Answers based on internal sources, external sources via Bing Search and various custom data sources.

Microsoft Copilot Pro

For those willing to invest $20/user/month, Copilot Pro offers priority access to GPT-4 and GPT-4 Turbo during peak times. This means faster response times compared to the free version, which could be crucial for businesses relying on Copilot for critical interactions. However, the current difference in response times between the free and Pro versions is minimal.

Key features:

- $20/user/month subscription fee.

- Priority access to GPT-4 and GPT-4 Turbo for accelerated performance during peak times.

- Best suited for SMEs with a need for reliability and speed.

Microsoft Copilot 365

Copilot 365 stands apart from the free and Pro versions by utilizing data generated within the host organization to train its natural language processing (NLP) models. This allows for more controlled and tailored responses, making it an attractive option for enterprises, organizations, and SMEs with large pools of institutional data. However, this version comes at a higher cost of $30/user/month, in addition to the standard Microsoft 365 subscription.

Key features:

- $30/user/month subscription fee (on top of Microsoft 365 subscription).
- Utilizes internally generated organizational data for NLP models.
- Provides specific answers to specific questions.
- Ideal for SMEs and enterprises with large data pools.

Microsoft Copilot Finance

Microsoft Copilot Finance is designed to accelerate time to business impact for finance professionals. It surfaces insights that reduce the time spent on manual, repetitive work. Some key capabilities include:

- Automate data reconciliation: Review transactions across systems for anomalies, risks, and unmatched data. Save and re-use customizable templates for insight that scales.
- Streamline variance analysis.
- Empower your collections team: Access a complete summary of customer balance history using Copilot-guided prompts and recommendations.
- Save time on communication.
- Access your data: Connect to your existing financial data sources, including ERP, using prebuilt connectors and Microsoft Copilot Studio.

"The finance-specific capabilities of Copilot Finance can significantly reduce the time and effort spent on repetitive tasks, allowing finance professionals to focus on more strategic initiatives," says Henrico.

Choosing The Right Version

When deciding which version of Microsoft Copilot is right for you or your organization, consider the following factors:

1. Budget: Determine how much you're willing to invest in Copilot and whether the additional features of the paid versions justify the cost.

2. Use case: Assess your needs and expectations from generative AI. If general answers suffice, the free version may be adequate. However, if you require specific, detailed and fast responses, consider the paid options. Copilot Finance and Copilot Security cater to specific industry needs.

3. Data sources: Evaluate the nature of your data and whether utilizing internal data sources (as with Copilot 365) would provide more relevant and accurate responses for your organization.

4. Organizational readiness: Implementing Copilot 365 effectively requires a shift in mindset regarding data compartmentalization and accessibility. Ensure your organization is prepared for this change before investing in the platform.

Copilot App

Copilot for Microsoft 365 combines the power of large language models (LLMs) with the intelligence of Microsoft Graph to help you get things done. If authorized by your organization, you have the option to add plugins for more data sources (like apps and web content) that Copilot will interact with on your behalf.
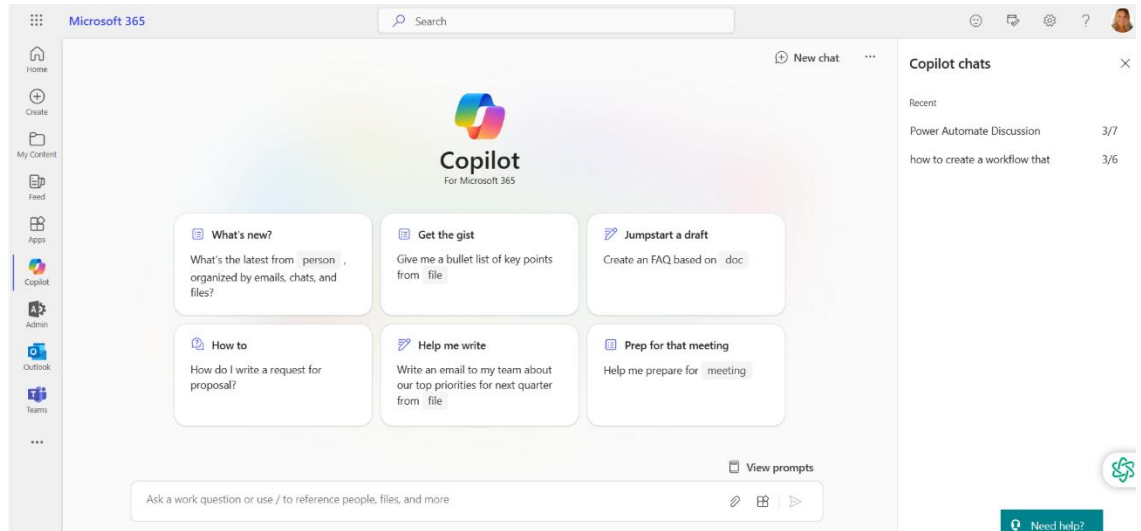
Copilot can synthesize data from multiple sources to give you a summary of things you need to catch up on, including your files, messages, meetings, emails, and people. It can also help you find and use info that's buried in documents or lost in conversations. And with Copilot by your side, you can create content with it all.

Ask a work-related question, or try one of these:

- Draft a message with action items from my last meeting.
- Catch up on my unread emails.
- How do I write a request for proposal?

Access Copilot 365

1. Log into your Microsoft Account online.
2. Click on the Copilot icon from the menu bar on the left.

Copilot Lab

Copilot Lab is a new feature of Microsoft 365 Copilot that empowers users to learn how to work with AI by experimenting with prompts, sharing insights, and exploring the possibilities. Here's what you need to know:
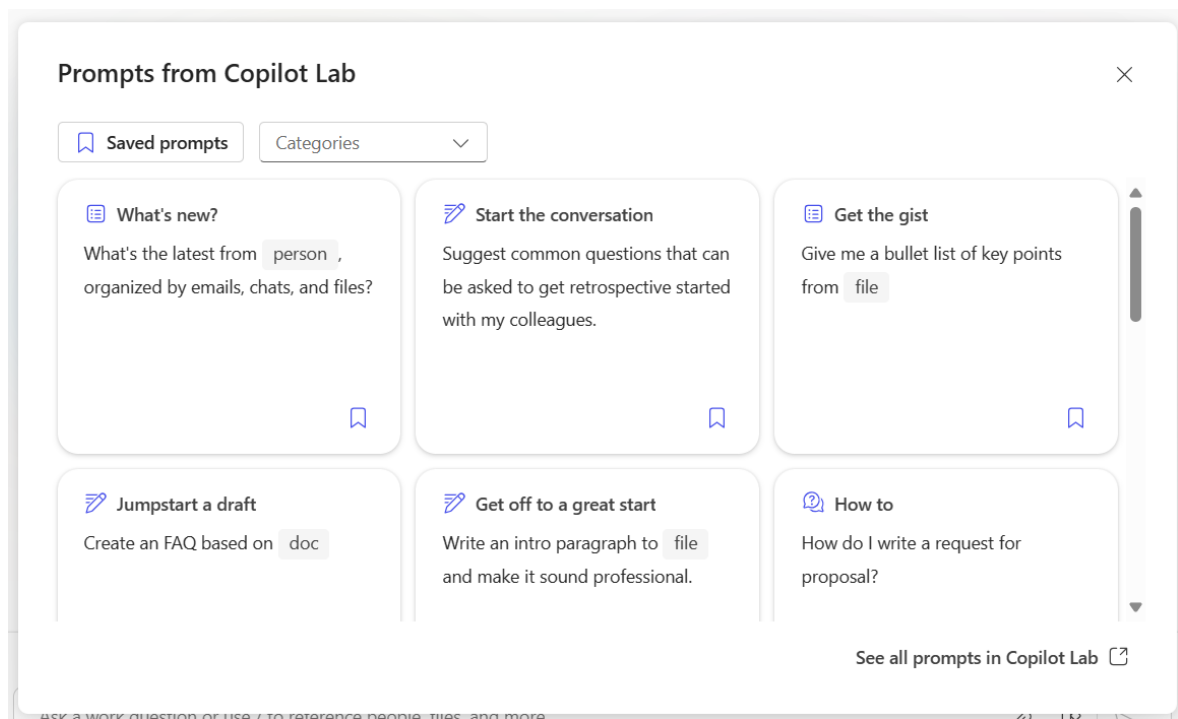
> 📱 View prompts

1. **What Is Copilot Lab?**
   o **Definition**: Copilot Lab serves as a hub where users can engage with AI in a hands-on manner.
   o **Purpose**: It enables users to learn, experiment, and collaborate on using Microsoft Copilot effectively.
   o **Features**:
      ▪ **Prompts**: These are instructions or questions that guide Copilot's behavior. Users can create, modify, and share prompts.
      ▪ **Learning Environment**: Copilot Lab provides a safe space to explore AI capabilities.
      ▪ **Inspiration**: Users can discover creative ways to leverage Copilot.
   o **Use Cases**:
      ▪ **Learning**: Understand how Copilot interprets prompts and generates code.
      ▪ **Collaboration**: Share insights and best practices with colleagues.
      ▪ **Innovation**: Experiment with novel ideas and approaches.
2. **How Does It Work?**
   o **Explore Prompts**: Users can access a collection of prompts within Copilot Lab.
   o **Customization**: Many prompts are customizable, allowing users to adapt them to specific tasks.
   o **Integration**: Once a prompt is selected, users can incorporate it directly into their workflow using Copilot.
3. **Why Should You Care?**
   o **Skill Development**: Copilot Lab helps users become proficient in working with AI.
   o **Community**: Engage with other Copilot users, share insights, and learn from each other.
   o **Innovation**: Discover new ways to enhance productivity and creativity.

Prompts from Copilot Lab ✕

🔖 Saved prompts | Categories ⌄

📋 **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.
🔖

📋 **Get the gist**
Give me a bullet list of key points from file
🔖

✍️ **Jumpstart a draft**
Create an FAQ based on doc

✍️ **Get off to a great start**
Write an intro paragraph to file and make it sound professional.

💬 **How to**
How do I write a request for proposal?

See all prompts in Copilot Lab ⬀

Ask a work question or use / to reference people, files, and more

Copilot in Outlook

Copilot combines the power of large language models (LLMs) with Outlook data to help you stay productive in the workplace.

Currently, Outlook Copilot introduces three key features:

Summarize emails - automatically creates a summary based on the content of an individual email or an entire email thread. This feature helps you comprehend the core information and quickly grasp the key points.

In the case of a very long thread, Summarize may not use older messages in the conversation, as there are limitations of how much can be passed into the LLMs. Users may see a warning that the summary doesn't represent the full thread.

To use Summarize:

1. In the reading pane of a current message, at the top right corner, click the Summarize icon.
2. To close the Summarize, click the icon again.

Draft emails - writes a comprehensive email draft based on the original email you're responding to or your own prompt when composing a new email. You can use the generated content as-is or tweak the tone and length settings to create a new draft that's just right for you.

For Draft with Copilot, users can choose what tone and length settings Copilot uses to generate content.

To use Draft emails in Outlook for the Web:

1. Open Outlook for the Web.
2. Create a new message.
3. Click the Copilot icon, then Draft with Copilot.
4. In the window, type in "what do you want this email to say?"

Improve emails (coaching) - analyzes your email drafts and provides feedback on tone, clarity and reader sentiment, accompanied by specific suggestions to improve various aspects of the email. This feature is particularly useful for obtaining feedback on crucial emails, allowing users to fine-tune their text before sending.

In Coaching by Copilot, users will not be able to use Coaching on a draft that is less than 100 characters.

To use Coaching:

1. Open a New Message.
2. From the ribbon click the Copilot icon, then Coaching by Copilot.
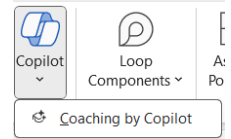
Copilot will review your email and offer suggestions to improve the tone, clarity, and overall reader sentiment.

Main Functionalities

These main functionalities offer a variety of practical applications, including:

- Condensing lengthy emails, meeting invites and whole discussions.
- Creating initial email drafts, providing a solid foundation for you to build upon.
- Helping you prepare for meetings and events: draft a meeting agenda from your notes, alert you about any conflicts in your Outlook calendar, and even offer recaps for your meetings that have already happened.
- Refining, rephrasing, and improving your emails, making sure your messages are clear, concise, and effective.
- Adding some style to your emails to make them more engaging and personalized.
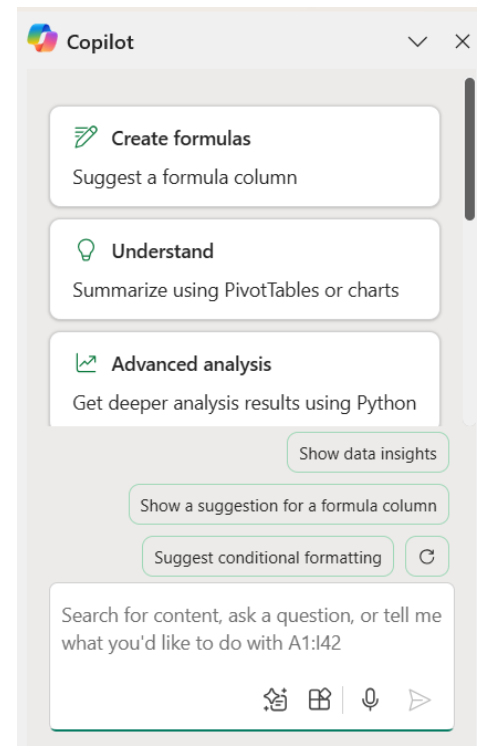- Teaching you to write better emails.

In summary, Copilot is an amazing tool that is actively developed. So, you can anticipate even more incredible features in future. Just as Microsoft shows in their promotional videos, it will be able to prioritize your emails and tasks, provide suggestions for follow-up actions, and search for information from other Office apps to include to your emails. And that's just the beginning!

Copilot in Excel

Copilot in Excel helps you do more with your data. Starting with a table with data, you can tell Copilot what you want to know using natural language. It can help show correlations, suggest new formulas based on your questions, and generate insights that help you explore your data. Format and organize your data, create visualizations, or ask for general formula column suggestions based on your data.

Copilot in Excel is a powerful tool that can help you visualize, analyze and transform data in your spreadsheets in many different ways. Here's what it can do for you:

- **Data analysis**. Copilot looks at your tables and brings important information into focus. You can then dig deeper by questioning Copilot.

- **Modeling**. When working on financial modeling, you can explore different scenarios by asking "what-if" questions and providing prompts such as "model how a change to X would affect Y"
- **Visualizations**. AI helps you create charts and graphs to visualize your data in a clear and understandable way.
- **Writing formulas.** Copilot assists in writing formulas for your calculations, making complex formula creation easier and more accessible.
- **Organizing and cleaning data**. Copilot can quickly clean up messy data for you. It can remove extra spaces, merge values from different columns, highlight duplicates, sort, filter, and more.
- **Suggestions**. Get intelligent recommendations for formulas, functions, and actions based on your context.
- **Insights**. Uncover interesting insights within your data, like trends, outliers, or correlations between different parts.
- **Automating tasks**. Copilot can even write VBA code to help you automate common tasks. This is like creating kind of shortcuts for things you do often.

Copilot in Excel is a handy helper that makes your work easier and helps you get more done without all the hard work.

Select **Copilot** on the ribbon to open the chat pane. Enter your prompts and start working with Copilot.
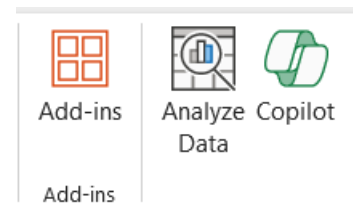
You'll need to have a table that includes data in a worksheet before using Copilot in Excel. Quickly turn a range of cells into a table by following these steps:

1. Click in a cell within a range of data.
2. Click the Copilot icon from the ribbon.
3. In the Copilot pane click Convert this data range to a table.

Note: Copilot in Excel does not yet work with charts, PivotTables, or ranges that are not formatted as Excel tables.

Talk to Copilot

Use the microphone icon at the bottom right corner of the Copilot window. This will allow you to talk directly to the system to enter the prompts instead of typing.
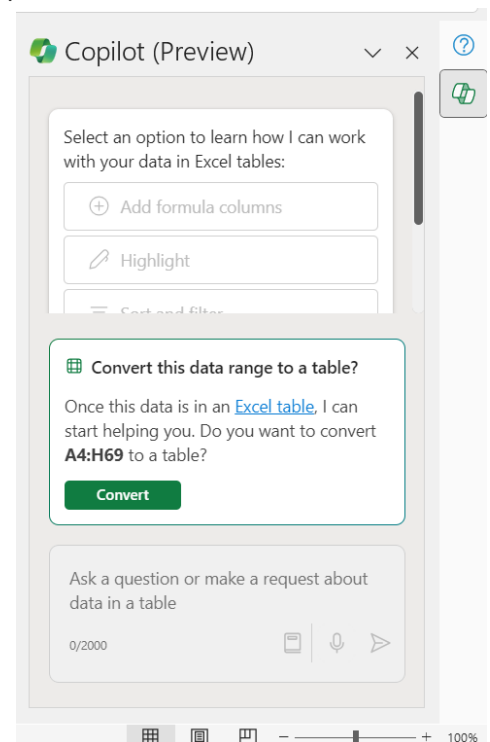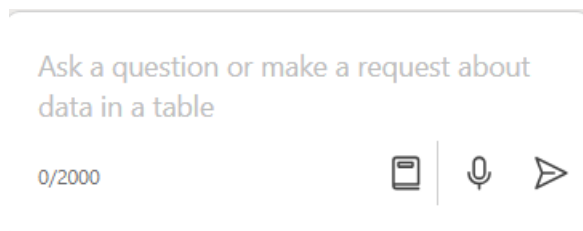
Copilot in Word

Copilot in Word ushers in a new era of writing, leveraging the power of AI. It can help you go from a blank page to a finished document in a fraction of the time it would take to compose text on your own. Here are some key features of **Copilot in Word**:

1. **Draft with Copilot**:
   - When creating a new document or adding a new line in an existing one, Draft **with Copilot** experience appears.
   - You can provide a simple sentence or a more complex request as a prompt for Copilot. For example, you could say, "Write an essay about baseball" or "Create a paragraph about time management."
   - If you have a **Copilot for Microsoft 365** license, you can reference up to three existing files to ground the content Copilot drafts.
   - Copilot will generate new content based on your prompt, and you can choose to keep it, discard it, or ask Copilot to regenerate a different version.
   - Use the **Inspire Me** button to have Copilot continue writing based on the existing content in your document.
2. **Transform with Copilot**:
   - Sometimes rewriting and editing existing content takes more time than writing from scratch.
   - Copilot helps you transform your existing content into a polished document.
   - Fine-tune Copilot's response by providing instructions like "Make this more concise."
3. **Chat with Copilot**:
   - Copilot Chat can provide helpful actions based on your document content or obtain additional content from outside resources.
   - Ask Copilot Chat questions to research, ideate, or iterate on possible content to add.
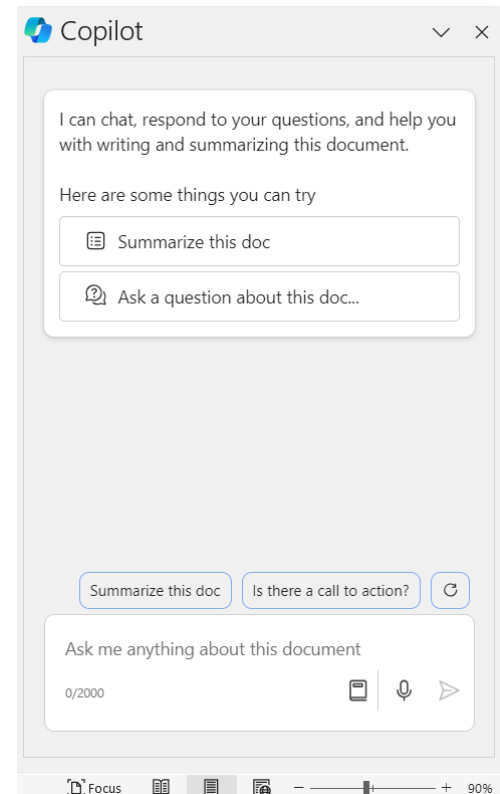4. **Summarize with Copilot**:
   - If you have a lengthy document to review, let Copilot help you distill it down to key points.
   - Open an existing document, select Copilot from the ribbon, and enter "summarize this document" in the Copilot compose box.

Remember that while Copilot may write exactly what you need, sometimes it can be "usefully wrong," providing helpful inspiration.

Open the Copilot Pane
Click the Copilot icon on the Ribbon to open the pane on the right side of the window.

Use the suggested things you can try or use the Prompt below to ask questions about the document.

This helpful feature provides answers to questions—broad or specific—about your document. You can even iterate and refine with back-and-forth discussions, get a summary or specific information about the document content, or ask it to generate ideas, tables, or lists that you can copy and insert into your document.

When generating summaries or asking questions about your document, Copilot will provide references with citations to where it retrieved its information from.

Using Copilot in a New Document

Select the icon or press Alt + i to draft with Copilot

When you open a new document in Word, you will see the Copilot icon and Select the icon or press ALT+ I to draft with Copilot.

As you continue to type in your document, Copilot will be there to assist you with the icon to the left of your current location.

## Using Copilot in Existing Documents

1. Select Text
2. Click on the Copilot icon and choose Rewrite with Copilot or Visualize as a Table.

Brochures from produ

Rewrite with Copilot

Visualize as a Table
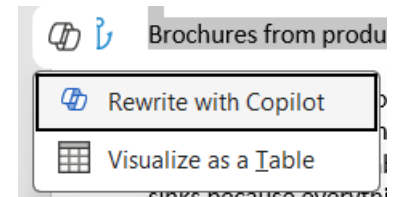
Rewrite with Copilot

Sometimes rewriting and editing your documents takes more time and thought than writing your ideas down in the first place. Copilot not only helps you create new content, but it also helps you transform your existing content into a document you can be proud of.

1. Open Word and an existing document.
2. Select the text you want to rewrite.
3. Click the Copilot button on the page and choose the "Rewrite with Copilot" option.
4. Click the back-and-forth buttons to navigate between the different draft suggestions.
5. Click the Replace button to insert the new text.
6. (Optional) Click the "Insert below" button to keep the original and newly generated content.
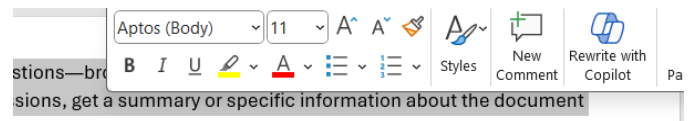
Also select the text and use the mini toolbar for Rewrite with Copilot.

Copilot in Teams
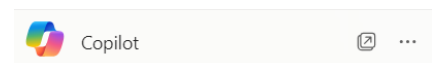
The new Copilot app in Microsoft Teams gives you personalized information, such as your meetings, files, or colleagues. Go back to your chat history with Copilot anytime you need a reminder and explore a range of prompts in the Copilot Lab to get the most out of your experience. The Copilot app is located at the top of your chat conversations and is currently offered with a Copilot for M365 license.

When you first open Copilot in chat, you will be presented with best practices for using Copilot and suggested prompts to get you started. Use Copilot to:
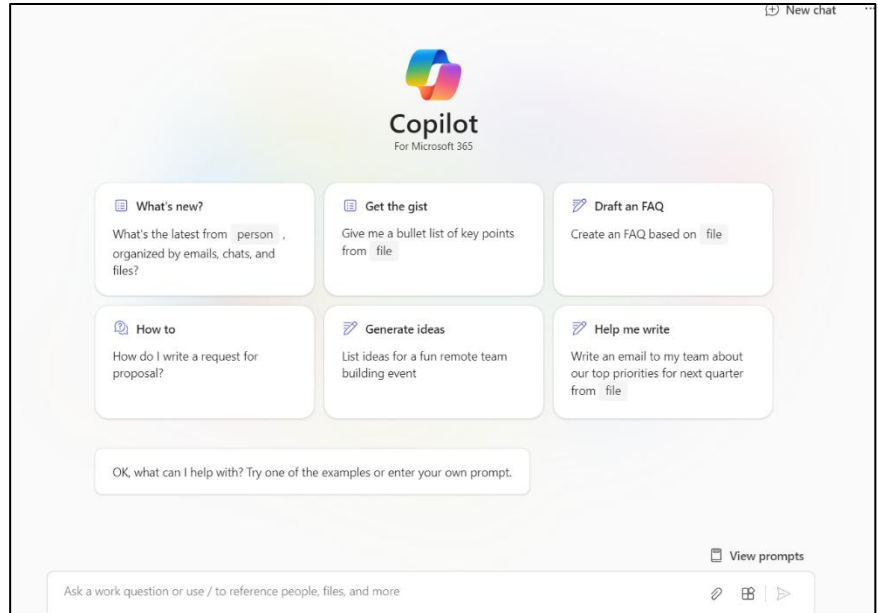
Summarize

- List out key points from [a file]
- Recap your last meeting
- Summarize unread emails from [this person]

Create

- Create an FAQ based on [a file]
- Write an intro to [an email]
- Suggest 5 compelling titles for [a file]

Ask

- What's my next meeting?
- Who am I meeting with tomorrow?
- Where was I mentioned by [a person]?

Some suggested prompts require you to refer to files or other data sources, which are indicated by blue text. Copilot will suggest a list of items you can choose from. To select something not on the list, type in the reference after the slash "/" in the compose box and select from the newly generated options.

Allow some time for Copilot to provide a response. After Copilot provides a response, ask clarifying questions, provide additional information, refine the output, or type another question that continues the conversation for up to 20 queries.

Select New Topic above the compose box to restart the conversation context with a new query and suggested prompts. Your previous chat history with Copilot will still be visible.

Copilot in Teams Meetings

Copilot in Microsoft Teams enhances collaboration and helps you get the most out of your Teams chats and meetings. Quickly recap, identify follow-up tasks, create agendas, and ask questions for more effective and focused meetings. Summarize key takeaways, see what you've missed, and pinpoint key people of interest in chat threads you were added to. All without breaking the flow of discussion.

Copilot in Teams uses your Teams chat and meeting content to generate insights and actionable suggestions alongside your most important Teams touch points.

During a meeting - Use Copilot in Teams meetings to summarize key discussion points—including who said what and where people are aligned or disagree—and suggest action items, all in real time during a meeting.

Have a more effective meeting

Act as a thought partner by trying these prompts within the Copilot compose box to the right of your meeting window:

- Where do we disagree on this topic?
- How did [a meeting participant] respond to this proposal?
- What questions can I ask to move the meeting forward?
- Where are some holes in [a meeting participant's] argument?
- Create a table with the ideas discussed and their pros and cons.

You can also select More prompts below the Copilot compose box and choose from the following:

- Recap the meeting so far.
- List action items.
- Suggest follow-up questions.
- What questions are unresolved?
- List different perspectives by topic.
- List the main items we discussed.
- Generate meeting notes.
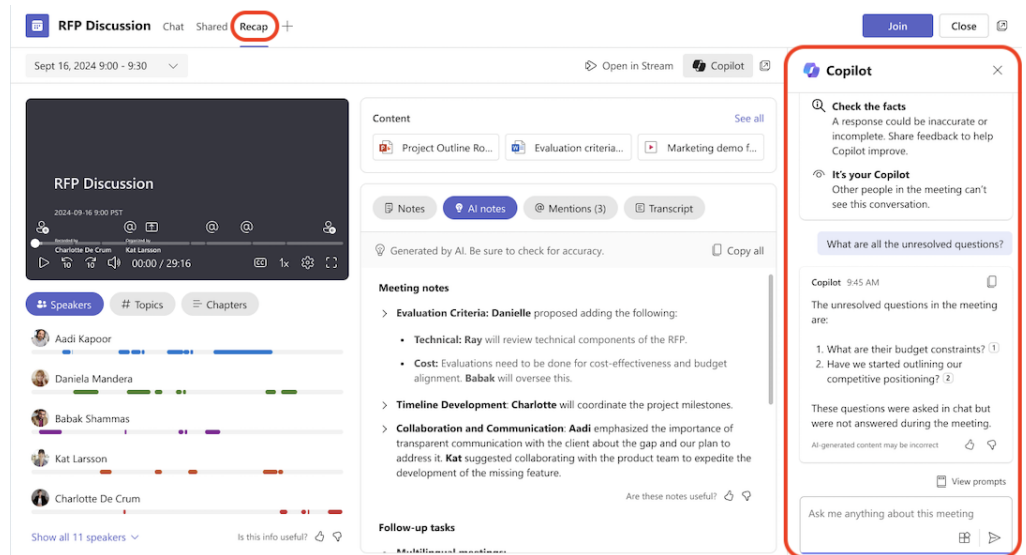
Wrap up a meeting with clear next steps

Copilot will send a prompt a few minutes before a meeting's scheduled end to help participants wrap up. Select Open Copilot to see a summary of key points of discussion and identify agreed-upon next steps, including tasks assigned to specific people. Participants can still make use of Copilot by asking if there are any unresolved issues or open topics from the agenda, or any other related questions that may help users to grasp the meeting wrap up.

After a meeting

Copilot in Teams meetings will also be available once the meeting has ended in the meeting's Recap tab. Notes:

- Intelligent recap is available as part of Teams Premium, an add-on license that provides additional features to make Teams meetings more personalized, intelligent, and secure. To get access to Teams Premium, contact your IT admin.
- Intelligent recap is also available as part of the Copilot for Microsoft 365 license.

From your Teams meeting chat, go to the Recap tab and open Copilot.

Here are some suggestions for prompts you might want to try. Copy them or modify them to suit your needs.

- What questions were asked, answered, and unresolved?
- What was the mood of the meeting?
- Summarize what people said, in a less technical way.
- Why did [a meeting participant] say that this idea was a good one?
- For each participant, what was the biggest concern? What were they most excited about?
- What ideas did [a meeting participant] have that I can share with the product team?
- Draft an email to the meeting participants that summarized the meeting and includes the action items.
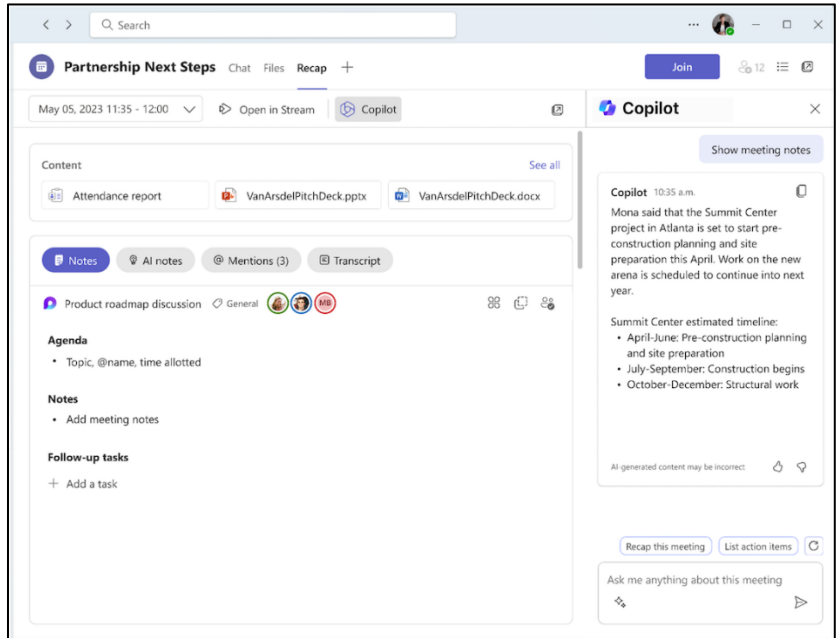
Copilot in Teams Chats

Copilot empowers you to ask questions about your chat conversations in Teams. You can use Copilot to quickly review the main points, action items, and decisions from your chats, without having to scroll through long threads. You can also choose to view highlights from the past 1, 7, or 30 days of conversation.

Note: Copilot in Teams chat only uses data available in the chat thread you have open.

Copilot is available in the following chats and only references the meeting chat, not the meeting transcript:

- One-on-one and group chats.
- Single meeting chats or scheduled private meeting chats.
- Meet Now chats.

To access Copilot in Teams chats:

1. Select a chat in Teams, then select Copilot in the upper-right corner.
2. A pane will open to the right of the chat where you'll find introductory information about using Copilot in chat, and a compose box to ask a question about the chat.
3. Besides answering questions and summarizing the conversation, select More prompts below the compose box to guide you and quickly pull out the details you need.
4. In responses from Copilot, you will see citations to the relevant information in the chat thread. Selecting a citation will take you to the referenced message in the chat thread to the left.

5. Only you can see your conversations with Copilot, but if you'd like to share the response with someone else, select Copy at the top right of the individual response to copy the text. Then, paste it into another chat, channel conversation, or anywhere else.
6. To close Copilot in chat, select Copilot again or the X button at the top right of the pane.

Use suggested actions in chat

Suggested actions appear in Teams chat and, when selected, will open Copilot to the right of the chat. For example, when returning to a chat, if there are eight or more unread messages, you might see a clickable suggestion "Summarize what I've missed." Select the suggestion to open Copilot and generate a chat summary.