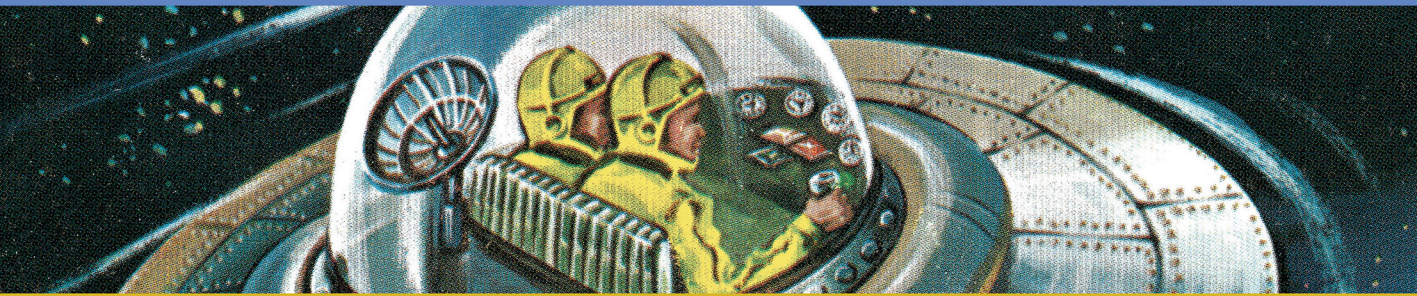


TECH TODAY



MICROSOFT 365[®] COPILOT[™] AT WORK

Using AI to Get the Most
from Your Business Data
and Favorite Apps



SANDAR VAN LAAN
JARED MATFESS
THOMAS FLOCK
ANN REID

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Microsoft 365® Copilot™ at Work



Microsoft 365® Copilot™ at Work

Using AI to Get the Most from Your
Business Data and Favorite Apps

Sandar Van Laan
Jared Matfess
Thomas Flock
Ann Reid

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To my patient and understanding wife, May, thank you for motivating me to get through this book. To Tobias and Gus, don't worry, boys, I'll be catching up on belly rubs and treats now that it's over. Love you.

—Jared

To my wife, Lee, I didn't believe in myself until you did. To my daughter, Ayumi, you kept me pushing myself.

—Thomas



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Introduction

In the spring of 2023, OpenAI announced it was releasing a free version of its ChatGPT-based AI personal assistant to the world. Microsoft followed with the announcement of Copilot for Microsoft 365 soon after. Siri and Alexa were already performing their personal assistant duties using artificial intelligence. It's safe to say we've now entered the modern era of AI personal assistants.

While each has its place and performs its duties well within its sphere, Copilot has moved to the front when it comes to the day-to-day tasks of today's information worker. Its native ability to tap into the Microsoft Graph gives it access to and awareness of everything related to users within their company's M365 environment—from documents to appointments to chats and beyond.

This allows Copilot to respond to questions and requests to create content with precision, accuracy, and a sense that it's truly aware of every piece of data it needs to bring to bear on the current task. From summarizing documents or emails, recapping Microsoft Teams meetings, to just getting past the blank page in Word or PowerPoint, this book will show you how to get the most out of Copilot's already great baseline productivity gains.

Copilot sits on the existing foundation of Microsoft's security and permissions, so we'll explain how to make the most of your company's current security policies, while also improving on them to prevent oversharing, using such tools as SharePoint Restricted Search, Sensitivity Labels, and data loss prevention (DLP).

The book also dives into deeper topics related to developing tools that build on top of Copilot, including how to create your own developer environment and use it to create custom copilots using Copilot Studio and Azure OpenAI.

Finally, Copilot is constantly evolving, with new features being released even as we write and try to keep up with them! To address this, we've included Chapter 16, which covers the Wave 2 improvements and additions to Copilot.

Who Should Read This Book

This book is for anyone who uses Microsoft productivity applications such as Outlook, Teams, Word, Excel, or PowerPoint and is considering using an AI personal assistant like Copilot to increase their productivity and efficiency. It's also intended for corporate Information Technology and change management personnel who are considering a rollout of Copilot for their organization. If you're looking to get the most out of Copilot, this book is for you!

Companion Download Files

Within some of the chapters, we mention or use additional files, such as checklists or spreadsheets. So that you don't have to re-create these on your own, we have placed copies online. Additionally, some pages are designed as forms or handouts. These items are available for download at www.wiley.com/go/copilotatwork.

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Microsoft 365® Copilot™ at Work

Understanding and Using Copilot

In This Part

Chapter 1: Introduction to Artificial Intelligence

Chapter 2: Introduction to Microsoft 365 Copilot

Chapter 3: An Introduction to Prompt Engineering

Chapter 4: Security/Purview Planning in Preparation for Copilot

Chapter 5: Planning Your Microsoft 365 Copilot Rollout

Chapter 6: Microsoft Copilot Business Chat

Chapter 7: Microsoft Outlook

Chapter 8: Copilot in Microsoft Teams

Chapter 9: Copilot in Microsoft Excel

Chapter 10: Copilot in Microsoft PowerPoint

Chapter 11: Copilot in Microsoft Loop

Chapter 12: Transforming Text with Copilot in Microsoft Word

Introduction to Artificial Intelligence

“Some people call this artificial intelligence, but the reality is this technology will enhance us. So instead of artificial intelligence, I think we’ll augment our intelligence.”

—Ginni Rometty

Artificial intelligence, or AI, as I’ll refer to it throughout the rest of this book, is, in the broadest terms, intelligence shown by computers. It’s a field of computer science that develops processes and software enabling machines to interact with their environment and use learning and intelligence to achieve goals such as understanding, seeing, and communicating. Some better-known uses of AI that you may have encountered include advanced web search engines, recommendation systems, chatbots, self-driving vehicles, and computers playing humans in strategy games. Who among you reading this remembers, or has heard of, the IBM computer Deep Blue defeating then-reigning chess champion Garry Kasparov in the late 90s?

AI was officially founded at Dartmouth in 1956, which is where the term “artificial intelligence” was first recorded. However, the origins of AI can be traced back even further, to philosophical thinkers who described how the human brain works, and, of course, to the invention of modern-day computing. Science fiction has played a significant role in representing humanistic forms of

AI, from HAL in *2001: A Space Odyssey* to the *Terminator* movies to Tony Stark's J.A.R.V.I.S. in the *Avengers* movies.

Over time, AI has experienced both highs and lows. The highs occurred during periods when it seemed that the next big breakthrough—when true AI, indistinguishable from a human, would be realized—was just around the corner. You may have heard of the Turing test, first proposed by Alan Turing, which is considered a major threshold for determining whether an AI is indistinguishable from a human. We've seemingly reached that point multiple times in human history, only to see the moment slip away and AI again relegated to the back shelf.

More recently, ChatGPT restarted the discourse in late 2022, when OpenAI released its free version to the masses, quickly making it one of the fastest-growing applications in the history of the Internet. This was soon followed by Microsoft's announcement of Microsoft 365 Copilot (referred to hereafter as simply "Copilot"), and other companies, such as Google and Apple, announcing their new or improved flavors of AI personal assistants. It remains to be seen if this is the moment when AI is here to stay, but it certainly seems to be changing the way people work and, in some cases, live, and may well have staying power in its current form. Whether this change will be as transformative as the advent of unified communications (think chat instead of email), or possibly even the adoption of the Internet or mobile phones, remains to be seen. We'll be watching this space closely in the coming years.

The Importance of AI

Why is AI important? For one, it has the potential to revolutionize the planet, offering solutions to some of humanity's most daunting issues, such as cancer treatment and environmental sustainability. AI has already shown that it can enhance our more traditional research methods by aiding in information assimilation, data analysis, and harnessing insights—particularly in these two areas. That said, we must ensure that AI's evolution and use is guided by a sense of responsibility to guarantee its benefits are aligned with the common good.

Closer to home, AI is important to companies because it can exponentially increase the worker productivity and, in many cases, accomplish tasks that humans either can't perform or would require significant time and effort to complete.

AI can learn from data and automate tasks that are tedious or impossible for humans. It can also enhance the performance of existing tools, increase efficiency, and help businesses use data to make better decisions and innovations. AI can—and will—affect many sectors of society and the economy, changing the way we work, learn, and live, while creating a shift toward increased automation and data-driven decision-making.