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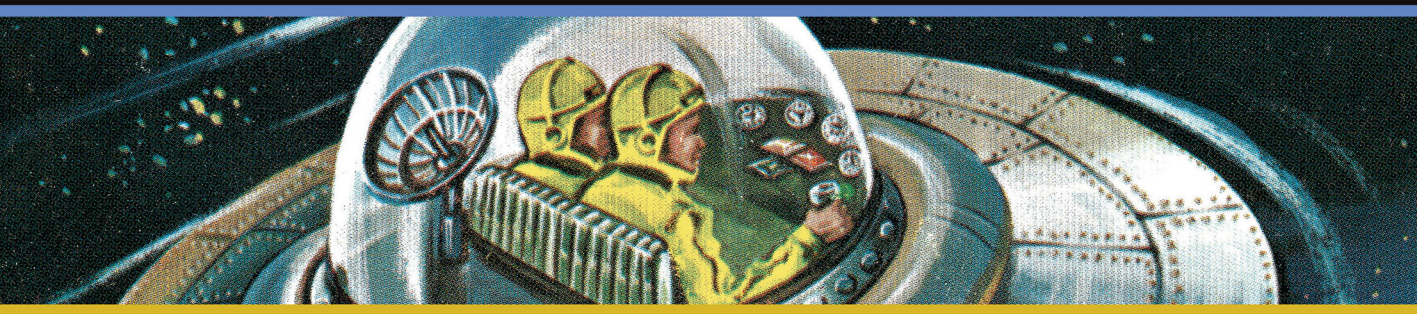
MICROSOFT 365® COPILOT™ AT WORK

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



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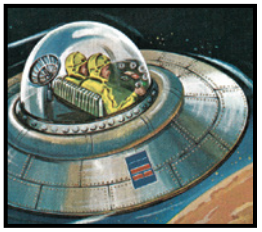

Microsoft 365® Copilot™ at Work

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To Julie and Abraham, thank you for giving me the grace of the evening and weekend hours required to bring this book into being. To Ruby, despite you telling me I couldn't do it, I did. Love you all.

—Sandar

To Finlay and Seren, thank you for your support, proofreading, and patience with this project!

—Ann

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

About the Authors

Sandar Van Laan has over 20 years of Microsoft technology experience and 15 years in consulting, and he is currently a Senior Principal at Slalom. He's interested in and wants to be involved in the coming wave of AI technology revolutionizing the way we live and work. He lives in Atlanta, GA, with his wife and two kids, and he enjoys bicycling, reading, and video games.

Jared Matfess serves as an AI Architect at AvePoint, bringing more than two decades of experience within the Microsoft ecosystem to his role. He has been honored with the Microsoft MVP award six times for the Office App & Services category and is actively engaged in sharing his expertise at various community events. Jared's primary ambition is to assist organizations in their transformation by leveraging advanced technologies like AI.

Thomas Flock is a senior consultant at Slalom, specializing in data integration using AI. His father was a senior engineer for MCI starting in 1983, the year Thomas was born, so he has been around computers all his life. Thomas grew up in the Fairfax, VA, area, and his first job was for Network Access Solutions in Herndon as a TCP/IP tester.

Ann Reid is a keen early adopter and experienced Copilot for Microsoft 365 implementation consultant with Slalom. With over 20 years of IT experience, she recognizes the transformative impact of Copilot for Microsoft 365 on organizations as well as challenges it presents. She shares some practical knowledge and strategies for building robust information protection capabilities and demystifies the process of prompt engineering for Copilot for Microsoft 365.

About the Technical Editor

Melissa Smith leads a global Microsoft Security team at Slalom. She has built and led Information Technology teams for startup organizations and has consulted with companies of all sizes across different industries on Microsoft tools and technologies. She specializes in Information Protection and Security with extensive experience in operationalizing tools and technologies to make them practical and beneficial for users. Residing in the greater Seattle, WA, area, she enjoys the outdoors, tending to her garden, and cooking and entertaining with friends and family, including her two daughters and their dog.

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Thank you to my father, Thomas Senior, and my stepfather, Rob, for getting me into computers and coding at such a young age. Thank you, Matthew Brewer, for getting me into AI and especially thank you, Ryan Jindra, for pushing me to learn and work hard. Your competitiveness with me to learn as much as we can was influential in me getting to where I am.

Finally, thanks to Melissa Smith for her invaluable guidance and expertise in the Microsoft Security arena.

Contents at a Glance

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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

Part

I

Understanding and Using Copilot

In This Part

CHAPTER

1

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.