We Make IT Work

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MICROSOFT 365 COPILOT

Your AI Assistant at Work

Seamlessly integrated into your M365 suite of applications, Copilot fuses advanced language models with your data, creating a dynamic productivity tool, extending its assistance to tasks such as identifying action items in Teams meetings, crafting Word documents, initiating Outlook responses, proposing content ideas in PowerPoint, and a myriad of other functionalities.

Experience a new level of productivity elevation with Copilot like never before.

HOW TO GET COPILOT...

Copilot can be added through your existing Microsoft 365 Subscription. Interested in learning more about Copilot? Reach out to the Braver Team for more details! **Sales@BraverTechnology.com**

HOW DOES COPILOT WORK?

Foundational Technologies

Microsoft 365 Apps: Copilot can access and utilize all the core Microsoft apps including Word, Excel, PowerPoint, OneNote, Outlook and Teams to help assist you throughout your day.

Microsoft Graph: Microsoft Graph provides Copilot visibility to files, meetings, chats, email, and calendar allowing you to reference content in a wide variety of ways.

Large Language Model (LLM): is an AI powered engine capable of parsing and producing human-readable text, through natural language.

The Copilot System

1. The process begins with a user entering a text prompt in the Copilot section of one of the M365 tools.
2. Copilot processes the request, checking against data in Microsoft Graph to ensure the request is relevant + actionable. *(This is process known as grounding)*
3. Copilot combines the information it receives from Graph with additional context, to make the prompt more easily understood by the LLM, which processes the request, and generates a response.
4. The response is then returned to Graph for additional grounding, including several *(behind-the-scenes)* verifications including a responsible AI check to ensure the response provided is ethical along with a security, privacy and compliance review.
5. Once Graph has finalized its checks, a response is generated and sent to the user. If any actions need to be taken, Copilot sends a command to the relevant application to execute the requested task.

Microsoft Graph

Large Language Model

Microsoft 365 Apps

SECURITY AND PRIVACY

Security and privacy are fundamental to the success of you business. For years, Microsoft has provided organizations with extremely high levels of security and privacy for their data. Copilot is no exception.

- Copilot automatically inherits your organizations existing compliance, security, and privacy policies from Microsoft 365. All data is encrypted and only available to users within the M365 tenant.
- As with every other feature in the M365 platform, data will not leak between users and groups. This means that Copilot users only have access to data they have been granted permission to in M365.
- The entirety of the organizations tenant (users, groups and data), as well as the LLM Copilot is referencing, sits within the Microsoft 365 Service Boundary. This means at all times, your data and all communication with the LLM remains within your secure organization.
- No eyes-on access means that nobody outside of your tenant, including Microsoft can view your data.
- The data generated by the LLM is not used at any point, to train the model in the future. *(This is not a guarantee of consumer-facing Large Language Models)*

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MICROSOFT 365 COPILOT Quick Start Guide

USING MICROSOFT 365 COPILOT

Now that we have a core understanding of how Copilot works behind-the-scenes, let's learn about all of the incredible things it can do!

Copilot is available in all of the core Microsoft 365 Productivity Apps including Word, Excel, PowerPoint, OneNote, Outlook and Teams.

Here you will find some ways to utilize Copilot across the M365 Productivity Apps. We have provided examples of prompts one might use with Copilot. This is by no means a comprehensive list of abilities or prompts, but simply a highlight of some of the ways Copilot can help you as you go about your day.

MICROSOFT WORD

Copilot in Word transforms every part of the writing process to make you more creative and efficient.

- **Generate:** Generate content based on context of the existing content in the document, with support to include files as a reference. "*Give me ideas for icebreaker activities for a new team.*"
- **Summarize:** Quickly generate a summary of a document. "*What are the key points in this doc?*"
- **Rewrite:** Take an existing block of text and rewrite the content to fit the desired tone. "*Rewrite the text to be more concise.*"

MICROSOFT EXCEL

Copilot in Excel enables anyone to analyze and visualize data like a data analyst.

- **Identify Insights**: Display insights based on your data or a specific question you ask about your data. "Show the total of advertising sales for each region last year."
- **Generate Formula Columns**: Add new columns with formulas based on your data. "Add a column that calculates the total profit for each marketing campaign in 2022. "
- **Data Organization & Formatting:** Highlight, filter, format and sort data. "Bold the top 10 values in the Sales column."

MICROSOFT OUTLOOK

Copilot in Outlook helps you stay on top of your inbox and create impactful communication in a fraction of the time.

- **Draft:** Save time preparing emails with Copilot as your drafting partner. "*Let the team know that the client has requested two additional trainings*"
- **Summarize:** Summarize an email thread to get key information with annotations. "*Summarize this email.*"

MICROSOFT POWERPOINT

Copilot in PowerPoint can help you create, design, and format your slides into stunning and professional presentations.

- **Create a new Presentation:** Generate a first draft from scratch or using an existing document. "*Create a presentation about the history of technology*"
- **Organize your slides:** Copilot can organize your presentation into sections automatically. "*Organize this presentation"*
- **Add content:** Easily generate a new slide or images "*Add a slide about the invention of the Internet*"

MICROSOFT ONENOTE

Copilot in OneNote helps you stay organized, prepared, and ready to take action.

- **Understand Your Notes:** Better understand your notes by summarizing, extracting a to-do list, list pros and cons, or rewriting notes. "*Extract a to-do list for my upcoming quarterly sprint*"
- **Create New Content:** Copilot can help you when you're stuck on a blank page and unleash your creativity. "*Give me ideas of names for a women's athletic clothing brand.*"
- **Chat with Copilot:** Collaborate with Copilot to find information in your notes, get tips and recommendations to improve your notes an learn new information to add to your notes. "*Which tasks from the previous sprint are incomplete?*"

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MICROSOFT 365 COPILOT

Quick Start Guide cont.

MICROSOFT TEAMS

Copilot in Teams enhances collaboration and helps you get the most out of your chats and meetings.

- **Quickly Catch-Up:** When you join a meeting five+ minutes late, Copilot will automatically generate a summary of what you missed.
- **Catch-Up**: You can also get up to speed on conversations by quickly reviewing the main points, action items,and decisions without having to scroll through long threads. "*Summarize what I've missed.*" or "*What links were shared in the last 14 days*"?
- **Elevate Meetings**: During a meeting, capture action items, different perspectives by topic, or unresolved questions. "*What questions are unresolved in this meeting*?"
- **Create:** Ask Copilot to draft notes and highlight key points for you during a meeting or chat thread.
- **Recap/Summarize:** Chat with Copilot after a meeting to gain insights, gauge sentiment and develop goals. "*For each participant, what was the biggest concern?* or "*What were they most excited about?* "
- **Make and receive calls:** Get real-time summarization and insights from Copilot while making and receiving calls from your Teams app on any device.

MICROSOFT PLANNER

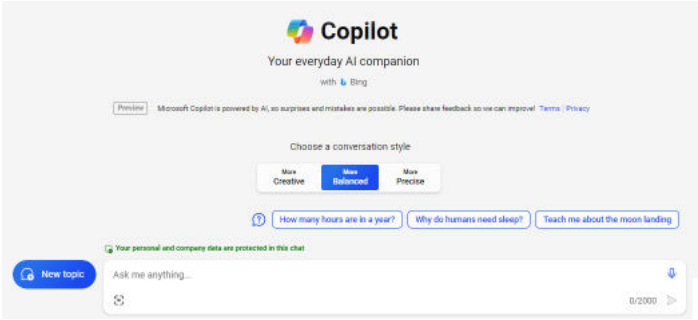
Copilot in the Planner Teams app will help you generate new plans, set goals, track status, and react to changes as projects evolve, through simple, prompts.

- **Build a plan:** Quickly generate comprehensive project plans by providing simple prompts. Outline tasks, assign responsibilities, and setting deadlines based on the info you input. "*Generate a new project plan for the upcoming marketing campaign using Copilot. Input key details such as tasks, deadlines, and team members.*"
- **Track Goals**: Set and monitor project goals by offering insights into key performance indicators (KPIs), milestones, and overall progress. "*Implement goal tracking for xxx plan. Identify key performance indicators (KPIs) and milestones outlined in the plan. Set up a system for visualizing the progress of these goals, and establish alerts for achieving specific milestones, such as hitting predefined sales targets. Ensure that the tracking system is integrated seamlessly with our current project plan.*"

MICROSOFT CHAT

Microsoft 365 Chat combines the power of AI with your work data and apps to help you unleash creativity, unlock productivity, and level-up skills.

Microsoft 365 Chat can find information on the web and generate content like most AI Chat Tools, with the added value of being able to incorporate your work content, such as chats, emails, and files to help you draft content, catch up on what you might have missed, and get answers to specific work questions.



Ask Questions: Microsoft 365 Chat enables you to get the answers you need quickly. You can ask questions about specific files and messages, or even ask for information you know is out there, but can't remember where it's stored.

Create Content: Microsoft 365 Chat enables you to brainstorm ideas and draft new content based on anything from a storyboard or a script to an agenda or an executive summary. Just reference your source material in your prompt to get started.

Catch Up Quickly: Microsoft 365 Chat can pull together quick summaries of projects, meetings, email messages, chats, and more. Use it to find out what's due, get the latest updates on a project, or find recent communications from a colleague or manager quickly.