

Copilot for beginners

Most people use Copilot as a better search box and stop there. These ten basics are what separates a licence from a habit: set up personalisation once, let it handle your calendar, schedule the prompts you repeat, and stop writing meeting minutes by hand. None of them takes longer than a coffee break.

As of: 6 August 2026

Where to open it

Same Copilot, different doorways. In the browser at m365copilot.com, inside Teams, and in the Office apps — it's the same assistant with the same context everywhere.

SETUP • „Install the app on your desktop and your phone so it's there when you need it.”

Personalisation

Move from generic to yours. Under settings you can tell Copilot what it should know about you and how it should answer — once, for every chat.

„I work on [your top 3 topics]. Keep replies short and direct. Always answer in [English/German]. If you're unsure, ask. Don't make things up.”

Calendar instructions

Copilot handles your invitations. In new Outlook or Outlook on the web, go to view settings, then Copilot, then Calendar instructions — or just tell Copilot in chat.

RULES • „Accept meetings from my manager if my calendar is free. Decline meetings on Fridays. Follow meetings where I'm invited as optional. If Outlook is already set to auto-decline conflicts, turn that off — the two can get in each other's way.”

Schedule a prompt

Don't type the same prompt every morning. Once you've sent it, hover over it and pick the clock icon to have it run on a schedule.

SETUP • „Run this prompt every weekday at 6:30 and notify me by email.”

Reference with /

Add context instead of describing it. Use the slash inside a prompt to point at a file, a meeting or a person directly.

„Summarise /[meeting] and /[file] into an executive summary for /[person].“

Transcribe every meeting

Stop writing minutes. Turn on the transcript and the Facilitator agent for your scheduled meetings — you need the transcript, not the recording.

„Generate a meeting summary, list all follow-up tasks and create a pros and cons overview for [topic A].“

Start and end your day

Get your personal briefing. Copilot is your assistant — use it like one, at the two moments that set up and close the day.

„Help me prepare my day. List unread messages and emails, list my meetings with a short briefing each, and my top priorities for today.“

Draft your emails

Don't spend your morning writing replies. Copilot has the context — let it draft, then you revise.

„Draft a friendly reply. Confirm the meeting on [date]. Ask whether they need the deck in advance. Keep it under five sentences.“

Talk to it

You speak faster than you type. Win+H starts Windows voice typing in any text field, including the Copilot prompt box. For a spoken back-and-forth, use the Copilot key or Win+C.

SETUP • *„Win+H only needs a microphone and an internet connection, no Copilot licence. Copilot's own voice features do need one and work in selected languages only.“*

Edit in Copilot

Copilot makes the change instead of describing it. Edit in Copilot works directly in Word, PowerPoint and Excel.

„Add a column with the percentage change against last quarter.“