

Microsoft Copilot

Getting the Most out of AI at Work

September 10, 2026

Copilot Introduction

- Same models as ChatGPT, Claude, and their own
- Viewed not as a “chatbot” but as a resource across Microsoft
- This can make it harder to use, but also much easier day to day as you learn

Copilot is *everywhere*

The same Copilot name appears in several places.

Context and available commands differ.

A meeting-specific Copilot pane has different scope from general Copilot Chat.

Use the app launcher or Apps and more to reach Microsoft 365 apps.

Why (some) Companies Insist on Copilot

- Already has permissions, security, access to many documents
- For most users, this is enough. Many companies have seen ChatGPT or Claude licenses go unused
- Microsoft also has enterprise-grade admin and controls

Why Copilot Can Be Frustrating

- So many options
- Not one coherent experience
- Not optimized ChatBot Experience
- Not the same level of harness support (harnesses are the systems AI models are used in)
- Nowhere near as easy to integrate with non-Microsoft tools

- ... Explore

📁 GTM Analysis

 Hugh Seaton

Work with ChatGPT across your favorite tools

Q Search plugins

Installed



Public Personal

Popular

New & Noteworthy

A horizontal row of four data analytics tools. From left to right: 1. 'Data' with a blue and purple bar chart icon, description 'Answer questions with data'. 2. 'Tableau' with a colorful plus icon, description 'See and understand data'. 3. 'Microsoft Power BI' with a yellow bar chart icon, description 'Explore and author analytics in your...'. 4. 'AWS Data Analytics' with the AWS logo icon, description 'AWS Data Analytics Plugin'. There are ellipses between Data and Tableau, and a plus sign between Power BI and AWS Data Analytics.

Copilot in the Wild

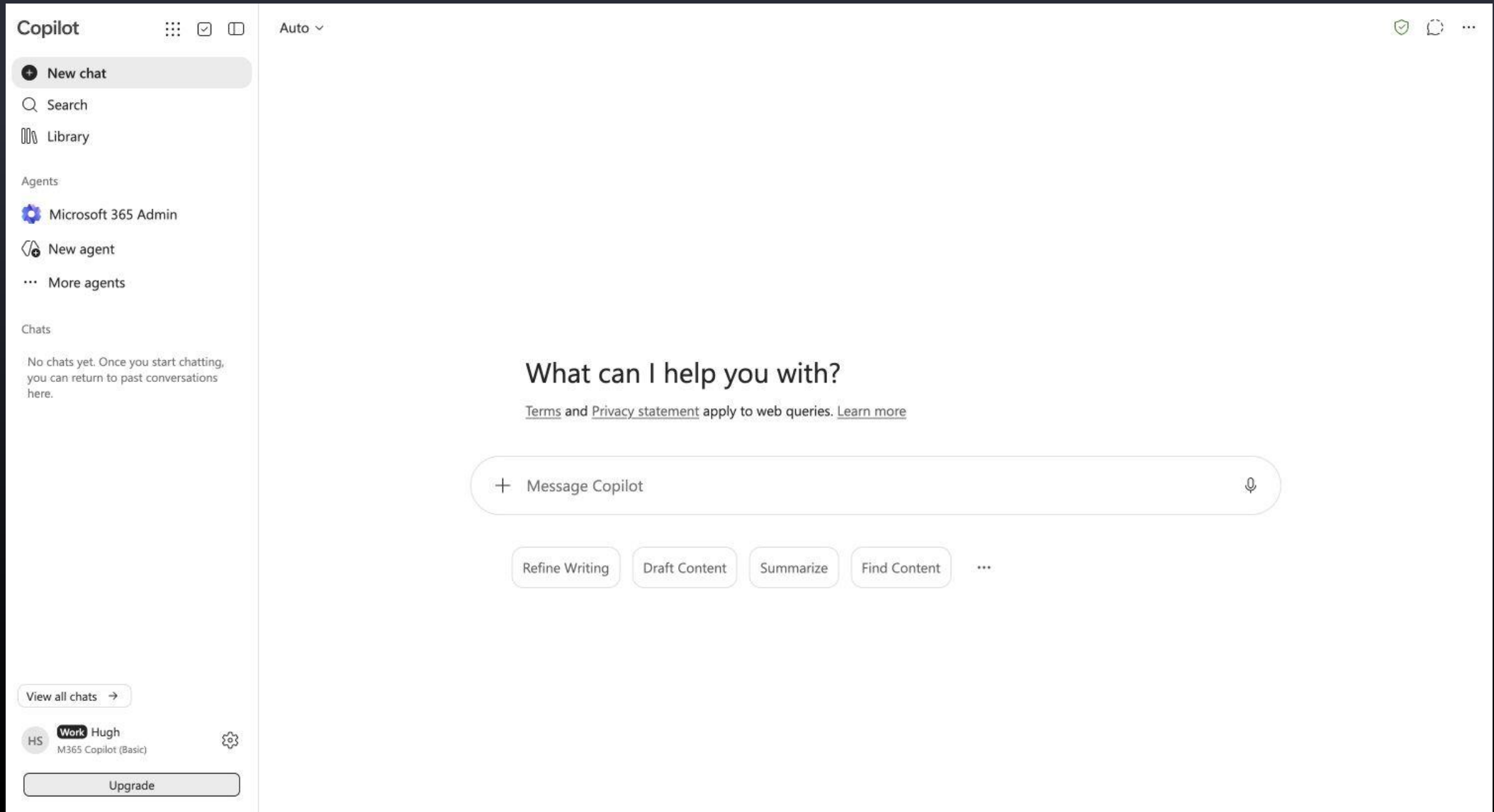
Level of Copilot License

- Chat license is free with Microsoft 365
 - Limited Chatbot, including uploads
 - Cannot connect or use agents
- Business Premium
 - Closer to a ChatGPT/Claude experience
 - Create limited agents
 - Connect to your email, other files
- Copilot studio
 - Build more advanced agents & automations
- Power Automate & other tools
 - More advanced automations and tools

Copilot Cheat Code

- Use ChatGPT alongside corporate Copilot to help you use the thing
- Just faster and easier
- Make sure you tell ChatGPT to look at the most recent documentation – it changes constantly

The Copilot home screen



New chat, Search, Library, Agents, account label, and settings

Book

Saved

Search for tools, help, and more (Option + Q)

HS

FileHomeInsertSharePage LayoutFormulasDataReviewViewAutomateHelpDraw

Undo

Paste

Clipboard

Calibri (Body)

11

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Conditional Formatting

Format As Table

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Sort & Filter

Find & Select

Add-ins

Add-ins

Claude

Claude

A1

✕

✓

f_x

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Auto

✎

...

✕

Let's edit your workbook

Allow editing

Describe what you'd like to edit

+

🔄

Gather research for my project

Build me a clean, professional looking table

Teach me something about Excel

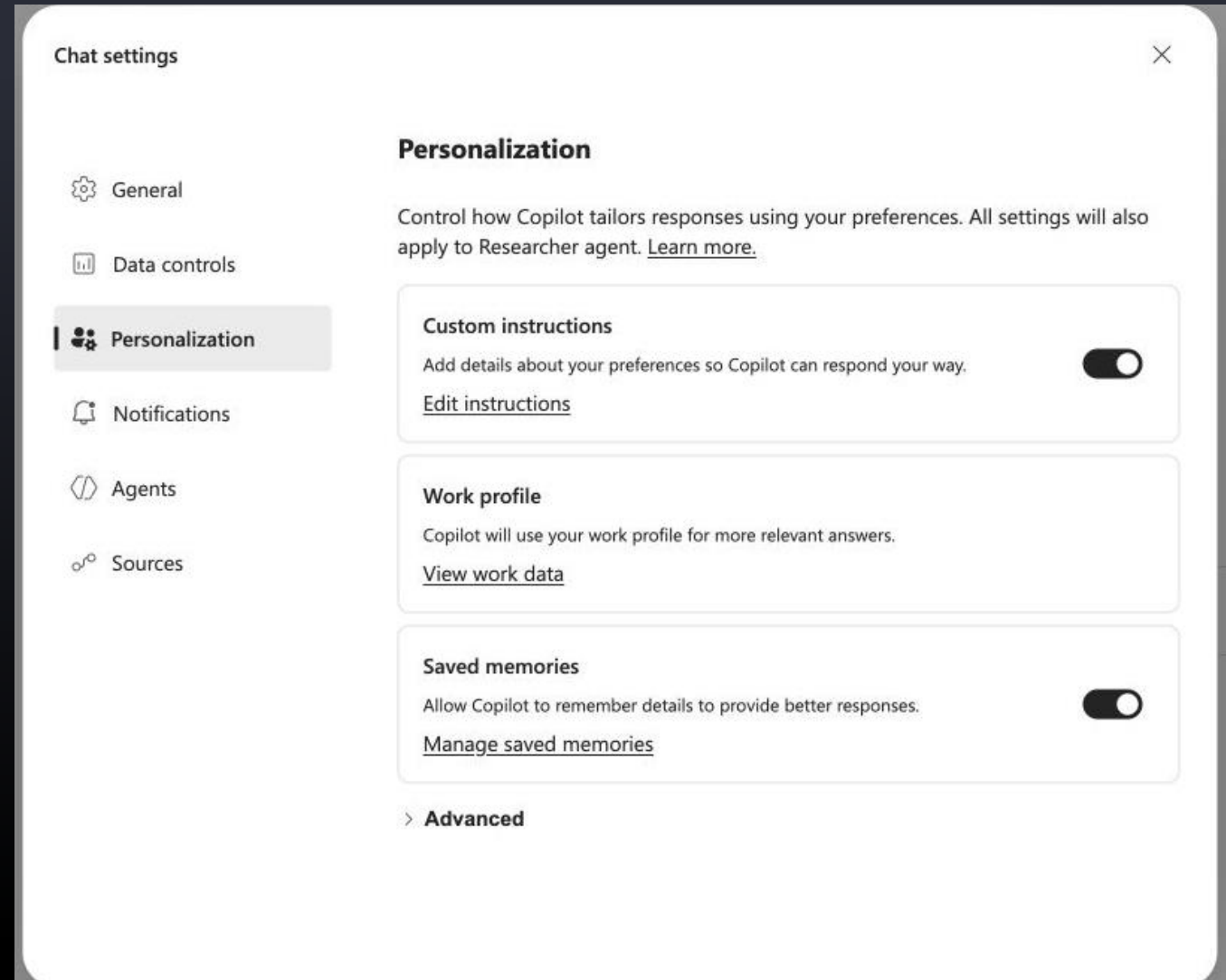
M365 Copilot (Premium)

The right place for the task

Where	A useful starting task
Copilot app	Chat, find work content, open agents
Outlook	Email questions and calendar help
Teams	Meeting recap and follow-up
SharePoint	Questions about selected company files

Personalization settings

- Open Settings and more.
- Choose Chat settings, then Personalization.
- Review custom instructions and saved memories.



Your custom instructions

- Select Edit instructions.
- Describe your role and preferred answers.
- Save, then test in a new chat.

The screenshot shows a 'Chat settings' dialog with a 'Personalization' tab selected. The 'Custom Instructions' section is active, displaying a text area for user input and a list of suggested instructions. The suggestions include: 'Give honest feedback', 'Use clear and simple language', 'Prioritize my manager', 'Highlight decisions in meeting notes', 'Focus on internal sources', and 'Use bullet points for summaries'. A 'Cancel' button and a 'Save instructions' button are at the bottom right.

Chat settings

← Personalization

Custom Instructions

Add details you want Copilot to know about you and specify how you would like it to format its responses.

Add your own custom instructions or choose from the suggestions

Feel free to include details about your interests, preferences, goals, or any specific context that could help Copilot deliver the best possible assistance and personalized insights.

+ Give honest feedback

+ Use clear and simple language

+ Prioritize my manager

+ Highlight decisions in meeting notes

+ Focus on internal sources

+ Use bullet points for summaries

Cancel

Save instructions

A useful personalization example

- I work in HVAC construction.
- Use plain language and concise, professional responses.
- Start with the requested answer. Use short bullets when helpful.
- Identify missing information and unsupported assumptions.
- Preserve dates, quantities, and commitments when rewriting.

Copilot Agents

- They use the word to mean multiple things
- Start with a simple agent that is really just a tool for repetitive work
- You can build/use these agents in multiple places:
 - Sharepoint site
 - Onedrive folder
 - Teams
 - Excel/Powerpoint/Word

Simple Agents

- Think of a reusable assistant with a defined purpose.
- It combines instructions with selected knowledge.
- This is comparable to the custom-GPT idea familiar to ChatGPT users.
- A basic agent responds when asked. Automation needs a trigger.

My files ▾

Share Copy link Copilot Request files Delete Add to favorites Download 1 selected Details

✕ 1 selected Details

 Name  Modified 

Build your own AI assistant

Create an agent with your files or folders to help you answer questions, summarize information, and stay organized.

Try it

Dismiss

Sharing ▾ Activity

Private

Private

Private

Browse files by

 People

 Meetings Media

Quick access

FO Field Operations AI

02 Meeting and Email Examples July 22

03 Agent Knowledge Sources July 22

Attachments July 22

BCW_CCMC_Copilot_Workshop July 22

Copilot Demo Content July 22

Documents July 23

Microsoft Copilot Chat Files July 22

Scans July 29

Hugh Seaton

0 items

Private

Hugh Seaton

8 items

Private

Hugh Seaton

2 items

Private

Hugh Seaton

1 item

Private

Hugh Seaton

11 items

Private

Hugh Seaton

0 items

Private

Create your new agent



Overview

Sources

Behavior

Name *

01 Project Documents agent



 Change

Purpose *

Provide a brief description of the agent's objective.

This is an agent curated based on the content from the selected sources.

Agent preview

Give Feedback

 01 Project Documents agent

Hello Hugh Seaton!

Ask a question or get started with one of these prompts:

Summarize recent items

Tell me more about...

How can you help me?



Ask questions or type / to add files or people.



AI-generated content may be incorrect

Create agent

Create your new agent



Overview

Sources

Behavior

Welcome messaging

Help users understand how to best use this agent

Ask a question or get started with one of these prompts:

Starter prompts

Help users by providing questions or requests that showcase how this agent can help.

Summarize recent items

Tell me more about...

How can you help me?

Agent instructions

Define the agent's role, tone, and limitations. Be specific about what responses you'd like and give examples if needed.

Provide accurate information about the content in the selected files and reply in a formal tone.

Agent preview

Give Feedback

 01 Project Documents agent

Hello Hugh Seaton!

Ask a question or get started with one of these prompts:

Summarize recent items

Tell me more about...

How can you help me?



Ask questions or type / to add files or people.



AI-generated content may be incorrect

Create agent

Create your new agent



Overview

Sources

Behavior

Agent responses depend on the sources you select. Ensure people using this agent can access those sources. Choose up to 20 sources from sites, folders, files, pages, or lists.

Prioritize the knowledge sources you added for agent knowledge-based queries. [Learn more](#) ⓘ ☒

Add a source

From OneDrive

— or —

🔍 Search by site title or enter a URL



Hugh Seaton's OneDrive



01 Project Documents



Agent preview

Give Feedback

 01 Project Documents agent

Hello Hugh Seaton!

Ask a question or get started with one of these prompts:

Summarize recent items

Tell me more about...

How can you help me?



Ask questions or type / to add files or people.



AI-generated content may be incorrect

Create agent

01 Project Documents agent

 Edit agent  Chat history ▾

Hello Hugh Seaton!

Ask a question or get started with one of these prompts:

Summarize recent items

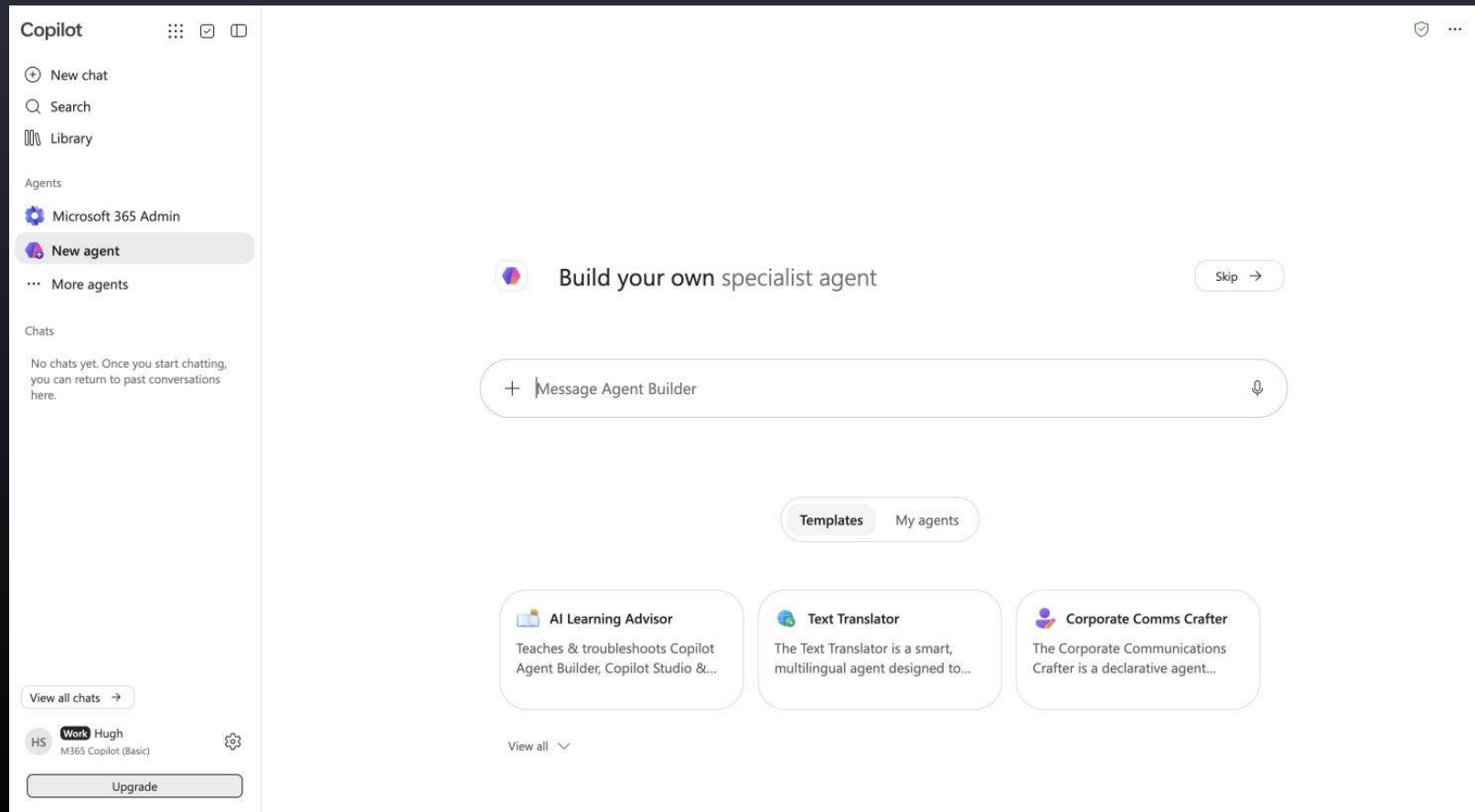
Tell me more about...

How can you help me?

+ Ask questions or type / to add files or people.

AI-generated content may be incorrect

New agent in Copilot



Select New agent, describe the task, or use Skip to configure it yourself

The agent configuration

- Name the job clearly.
- Review the Instructions text.
- Add only the knowledge the job needs.
- Use Preview to test it.

The screenshot shows the 'Agent Builder' interface. At the top, there's a header with 'Agent Builder', a 'Configure' dropdown, and a 'Create' button. Below the header, the agent is named 'Professional Email Helper' with a blue icon and a description: 'Rewrites short construction emails in a polite, professional tone.' To the right of the name is an 'Auto' dropdown. The main configuration area has two sections: 'Instructions' and 'Knowledge'. The 'Instructions' section has a text area containing the instruction: 'Rewrite the email the user provides. Keep it concise, polite, and direct. Preserve facts, deadlines, requested actions, and commitments. Do not add apologies, promises, or blame. If a missing fact matters, ask one question. Return only the revised email unless the user asks for an explanation.' Below the text area is a character count '294/8,000'. The 'Knowledge' section has a text area with the prompt 'Focus your agent by adding specific knowledge sources' and a button labeled '+ Add knowledge'.

Agent Builder

Configure

Create

Professional Email Helper

Auto

Rewrites short construction emails in a polite, professional tone.

Instructions

Suggest improvements

Rewrite the email the user provides. Keep it concise, polite, and direct. Preserve facts, deadlines, requested actions, and commitments. Do not add apologies, promises, or blame. If a missing fact matters, ask one question. Return only the revised email unless the user asks for an explanation.

294/8,000

Knowledge

Suggest improvements

Focus your agent by adding specific knowledge sources

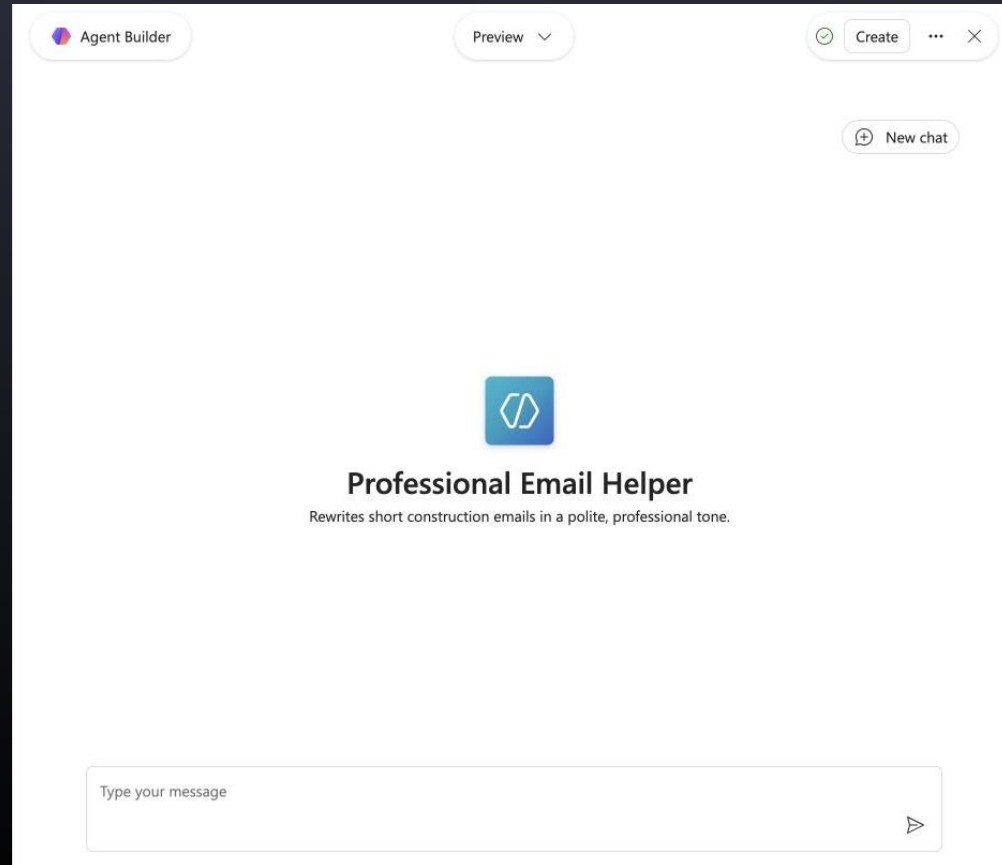
+ Add knowledge

Instructions for the email helper

- Rewrite the email the user provides.
- Keep it concise, polite, and direct.
- Preserve facts, deadlines, requested actions, and commitments.
- Do not add apologies, promises, or blame.
- Return the revised email. Ask one question if a key fact is missing.

Testing in Preview

- Try a normal request.
- Try an ambiguous request.
- Try a message with a firm deadline.
- Compare the result with your criteria.



After testing, choose Create. New agents start private.

Editing an existing agent

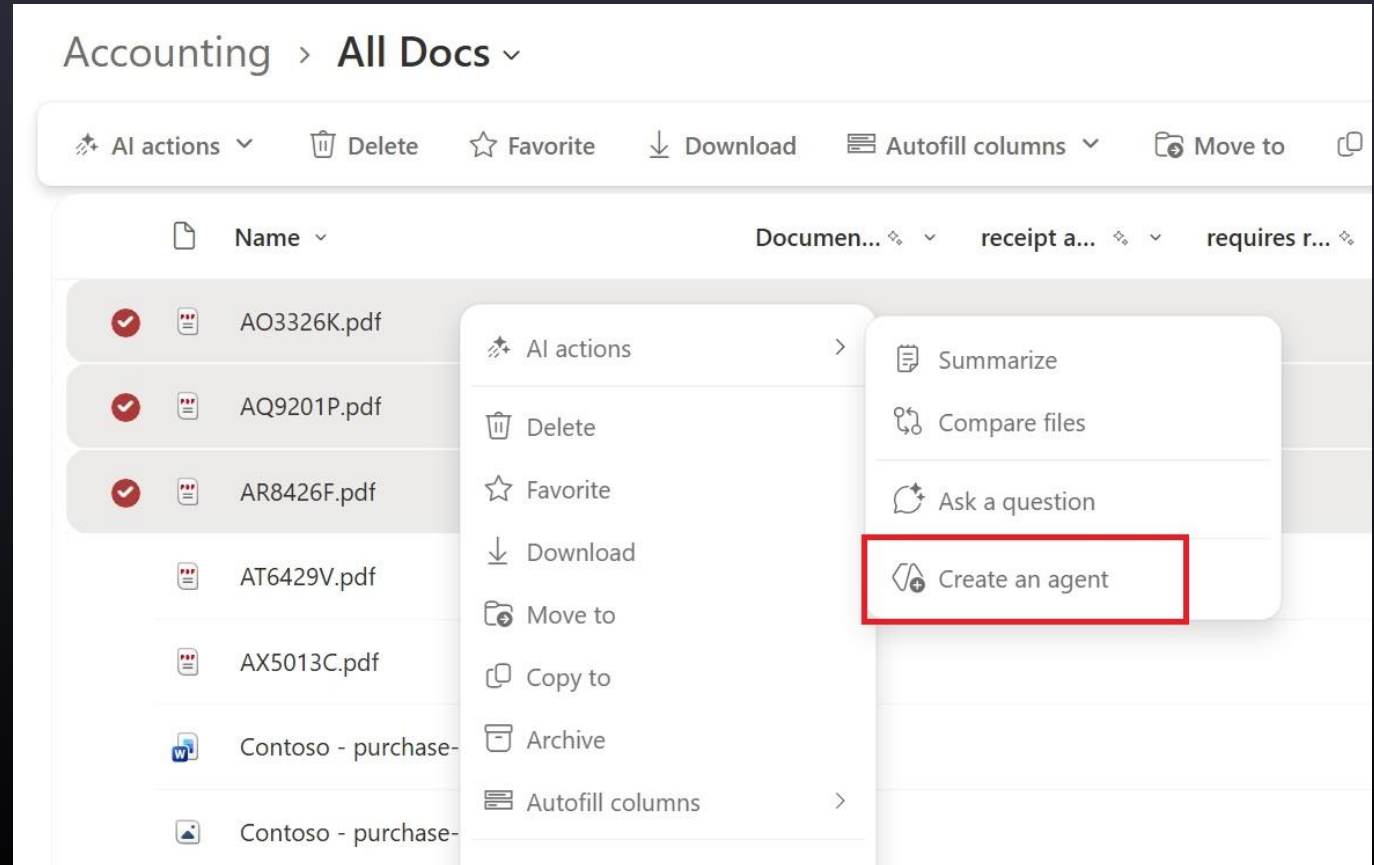
- Find the agent in your agents list and open its More menu.
- Choose Edit, then revise its instructions in Configure.
- Test the revised behavior in Preview or Try it.
- Choose Update to make the changes available to users.

An agent based on a SharePoint file

- Example: answer questions about the current closeout procedure.
- Select the approved file and verify its version.
- Ask for the answer plus the supporting section.
- Have the agent identify questions the procedure does not answer.

Creating the SharePoint agent

- Select the file in its document library.
- Open its menu and choose Create an agent.
- Review the selected source and behavior.



Microsoft documentation screenshot

The source and sharing checks

- Confirm which file or site the agent will use.
- Give it a narrow purpose and response format.
- Check each user's access before sharing.

The screenshot shows the 'Create your new agent' interface. It has a top bar with 'Overview', 'Sources', and 'Behavior' tabs. The 'Overview' tab is active. Below the tabs, there's a light blue box with a hexagonal icon and text: 'Work smarter with your own AI assistant. Agents are AI assistants that can help you stay on track by simplifying complex tasks and providing guidance based on what you're working on. Create your own by naming it, choosing its sources, and defining its behavior.' Below this, there's a 'Name' field with the text 'Accounting Agent' and a 'Purpose' field with the text 'This is an agent curated based on the content from the selected sources.' To the right of the 'Name' field is a purple square icon with 'SA' and a 'Change' button. At the bottom right is a 'Create' button. On the right side, there's an 'Agent preview' section with a 'Give Feedback' button. It shows 'Accounting Agent' with a greeting 'Hello MOD Administrator!' and three prompts: 'Summarize recent items', 'Tell me more about...', and 'How can you help me?'. At the bottom of the preview is a text input field with a plus icon and a microphone icon, and a disclaimer 'AI-generated content may be incorrect'.

Create your new agent

Overview Sources Behavior

Work smarter with your own AI assistant

Agents are AI assistants that can help you stay on track by simplifying complex tasks and providing guidance based on what you're working on. Create your own by naming it, choosing its sources, and defining its behavior.

Name *

Accounting Agent

SA

Change

Purpose *

Provide a brief description of the agent's objective.

This is an agent curated based on the content from the selected sources.

Create

Agent preview Give Feedback

Accounting Agent

Hello MOD Administrator!

Ask a question or get started with one of these prompts:

Summarize recent items

Tell me more about...

How can you help me?

+ Ask questions or type / to add files or people.

AI-generated content may be incorrect

Microsoft documentation screenshot

When the file agent gives a weak answer

- Check that the source is current, readable, and ready.
- Test one question with an answer you can find in the file.
- Test one question the file does not answer.
- Require a source reference and verify it yourself.

In Agent Builder, source-priority settings do not fully block general AI knowledge

A daily briefing has a defined job

- Today's meetings and the preparation each needs.
- Recent emails requiring a response or decision.
- Outstanding items for one named project or customer.
- A short list of gaps to check yourself.

A reusable briefing agent

- Create an agent with the briefing format in its instructions.
- Add My emails for mailbox context.
- Add My Teams chats and meetings for meetings and calendar context.
- Test the agent manually before adding any recurring workflow.

Teams and email knowledge require the paid Microsoft 365 Copilot add-on

Calendar scope: dates that stay correct

- Name the calendar and timezone.
- For a recurring briefing, define today relative to each run.
- Separate meetings today from preparation for upcoming meetings.
- Ask it to state the exact window it used at the top.

Example: Each run, use America/Chicago. List meetings on my calendar from 00:00 today through 00:00 tomorrow, excluding the endpoint. Show start time, title, preparation, and source.

Email scope: people and date range

- Specify sender, To recipient, and whether CC should count.
- Choose received date or sent date explicitly.
- Identify the project as well as the person.
- Check near-matches and messages just outside the window.

Example: Summarize received emails from [exact address] about Project Cedar in the last 7 days. Show the window, message date, requested action, due date, and source.

A briefing format you can inspect

Section	Required information
Coverage	Run time, timezone, date window, included sources
Meetings	Time, meeting, preparation needed, source
Email follow-up	Person, issue, requested action, due date, source
Gaps	Missing owner, unclear due date, unavailable material

Scheduling a tested briefing prompt

- Run the complete briefing prompt in Copilot Chat.
- Hover over the prompt and choose Schedule this prompt.
- Set timing, frequency, and notification preference.
- Review results in Chats and manage them under Scheduled prompts.

Paid Copilot license required. Up to 10 scheduled prompts.

Simple Outlook actions

- Ask Copilot to help schedule a meeting or focus time.
- Ask it to flag matching messages or help create an Outlook rule.
- Review the people, dates, and action before confirming.
- Check the actual calendar or message state afterward.

Professional emails without extra words

Terse original

Need the revised duct layout by 2 pm today.
We cannot release fabrication without it.
Send it.

Polite and direct

Please send the revised duct layout by 2 pm today. We cannot release fabrication without it. Thank you.

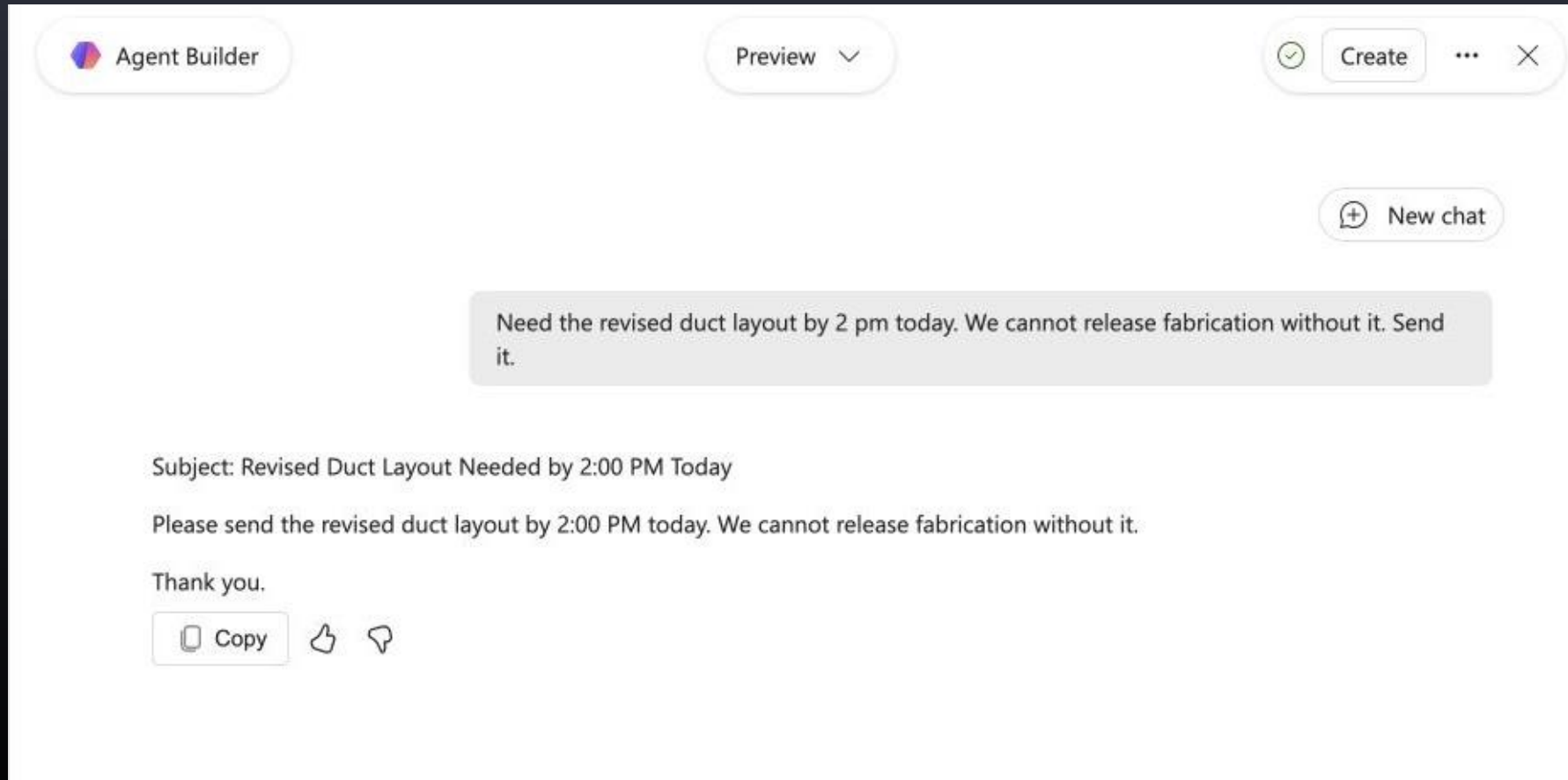
The deadline, requested document, and fabrication constraint stay the same

A focused email-rewriting prompt

- Make this concise, professional, and polite.
- Preserve the deadline, required action, and project facts.
- Keep the message firm where the original is firm.
- Add no new apology, commitment, or explanation.

The Professional Email Helper agent can reuse these instructions

The email helper in practice



Actual Preview response to a fictional construction email

Teams transcripts and follow-up

The screenshot displays a Microsoft Teams meeting interface for a meeting titled "RFP Discussion" held on September 16, 2024, from 9:00 to 9:30 PST. The interface includes a video player, a list of speakers (Aadi Kapoor, Daniela Mandera, Babak Shammass, Kat Larsson, and Charlotte De Crum), and a "Recap" button highlighted with a red circle. The "Content" section lists documents like "Project Outline Ro..." and "Evaluation criteria...". The "Notes" section shows AI-generated meeting notes, including "Evaluation Criteria" and "Timeline Development". A "Copilot" sidebar on the right, also outlined in red, provides a "Check the facts" section, a list of unresolved questions (e.g., "What are their budget constraints?"), and a prompt to "Ask me anything about this meeting".

RFP Discussion Chat Shared **Recap** +

Sept 16, 2024 9:00 - 9:30

Open in Stream Copilot

RFP Discussion

2024-09-16 9:00 PST

Recorded by Charlotte De Crum Edited by Kat Larsson

00:00 / 29:16

Speakers # Topics Chapters

Aadi Kapoor

Daniela Mandera

Babak Shammass

Kat Larsson

Charlotte De Crum

Show all 11 speakers

Is this info useful?

Content See all

Project Outline Ro... Evaluation criteria... Marketing demo f...

Notes AI notes Mentions (3) Transcript

Generated by AI. Be sure to check for accuracy. Copy all

Meeting notes

> **Evaluation Criteria:** Danielle proposed adding the following:

- **Technical:** Ray will review technical components of the RFP.
- **Cost:** Evaluations need to be done for cost-effectiveness and budget alignment. Babak will oversee this.

> **Timeline Development:** Charlotte will coordinate the project milestones.

> **Collaboration and Communication:** Aadi emphasized the importance of transparent communication with the client about the gap and our plan to address it. Kat suggested collaborating with the product team to expedite the development of the missing feature.

Are these notes useful?

Follow-up tasks

Copilot

Check the facts
A response could be inaccurate or incomplete. Share feedback to help Copilot improve.

It's your Copilot
Other people in the meeting can't see this conversation.

What are all the unresolved questions?

Copilot 9:45 AM

The unresolved questions in the meeting are:

1. What are their budget constraints?
2. Have we started outlining our competitive positioning?

These questions were asked in chat but were not answered during the meeting.

AI-generated content may be incorrect

View prompts

Ask me anything about this meeting

After-meeting questions require an accessible transcript

The latest three OAC meetings

- Name the project, exact meeting title, and search window.
- Ask for the three most recent completed meetings.
- Check the dates and transcript links before analysis.
- If one is missing, supply the specific transcripts.

Find the latest 3 completed "Project Cedar OAC" meetings before today. List date, title, and transcript source. Identify missing transcripts. Stop before summarizing.

Progress, outstanding issues, and owners

- Compare the same issue across the confirmed meetings.
- Show progress and explicitly recorded decisions.
- List open issues with owner and due date when recorded.
- Label gaps: "No owner recorded" or "Status unclear."

Silence in a later meeting does not prove that an issue is resolved

An OAC follow-up summary

Issue	Progress / status	Owner recorded	Next check
Duct layout	Revision issued Sept 8; approval unclear	Design team	Confirm approval
Delivery access	Still open in Sept 8 discussion	None recorded	Assign an owner
Riser clash	Sept 8 meeting records resolution	Coordination lead	Confirm model update

Illustrative format and fictional data. A real summary should link each row to its source.

An agent for Teams meeting review

- Give a meeting-review agent a consistent format and selected Teams meetings or transcript files as knowledge.
- Use it to produce a repeatable progress-and-follow-up summary, then choose the appropriate sharing or Teams deployment route.

A Teams chat source alone is not proof that all meeting transcripts are available

My Favorite: Copilot on Your Phone

- Use Copilot + camera, and even use agents
- Transcribe and file a receipt
- Look up MSDS for a new material
- Reference specs you have stored in the onedrive agent you made



Copilot is Starting to Get Useful

- Important to think of it as a resource inside Microsoft 365, not a competitor to ChatGPT
- They're introducing WorkIQ and some other tools that will continue



Have Questions About AI? SMACNA AI Office Hours Now Available!

Book an appointment with Hugh Seaton, SMACNA's AI Consultant, to answer your questions about this emerging tool.

Do you have questions about AI? Whether you are just starting, need help with troubleshooting, or want to talk strategy, SMACNA members can now connect with our AI specialist for support. No question is too simple or too advanced. Hugh Seaton is available for appointments to help you explore how AI can benefit your company and shape the industry.



This is one more way SMACNA is helping members gain the knowledge they need to make the most of AI. Technology and the use of AI in construction are skyrocketing, and we are excited to support this change in how our members work. By collaborating with top experts, SMACNA aims to provide members with the resources and education needed to keep pace with these changes.

Latest Articles

Register for Collective Bargaining Orientation

Sep 9, 2026 - The session, being held on February 10-11, will give you insights into several key issue areas, including bargaining fundamentals, preparation skills, and understanding costs, benchmarking and analytics.

SMACNA Advocates for Bill to Improve IAQ, Living Conditions in Military Housing



Thank you

Hugh.seaton@thelink.ai

What Copilot Studio adds

- A fuller environment for agents and workflows.
- Connections to systems beyond the immediate chat.
- Tools that can take actions and apply workflow logic.
- Testing and publishing to supported channels.

A Studio workflow example

- Trigger: a scheduled review of a controlled delivery list.
- Read the records and identify items needing attention.
- Prepare a proposed follow-up message with supporting details.
- Route it for review before sending or updating the record.

Illustrative workflow design. Connectors, access, and testing determine feasibility.

Three labels you may see

On-screen label	What it tells you
Copilot Chat (Basic)	No Copilot add-on. No Copilot in Word, Excel, PowerPoint, or OneNote.
M365 Copilot (Basic)	No Copilot add-on. Standard Copilot access in the apps.
M365 Copilot (Premium)	Copilot add-on assigned. Full app experience with priority access.

What included Copilot Chat can do

- Answer questions using the web and files you provide.
- Rewrite, summarize, compare, and organize supplied content.
- In Outlook, answer inbox and calendar questions and support actions.
- Use simple agents, subject to their sources and your organization's settings.

Microsoft 365 Copilot Business

- Connects questions to accessible emails, meetings, chats, and files.
- Adds the full Copilot experience across supported Microsoft 365 apps.
- Includes advanced agents such as Researcher and Analyst.
- Requires an eligible base plan. Business is available for up to 300 users.

U.S. page checked September 10: \$21 list / \$18 promotional per user monthly, paid yearly