



Copilot in Teams

NC Innovation Day

June 2025



Topics

- Prompting Recap
- Copilot in Teams Overview
- Copilot in Teams Practice
- Features coming to GCC
- Tips & Tricks with Copilot in Teams
- Questions

The art and science of prompting

Prompts are how you ask Copilot Chat to do something for you — like **creating, summarizing, reviewing, or researching**.

Think about prompting like having a conversation, using plain but clear language and providing context like you would with an assistant.

Tell Copilot Chat what you need

Review text:

"Check this product launch rationale for inconsistencies."

Summarize information:

"Write a session abstract of this [presentation]."

Create engaging content:

"Create a value proposition for our new product using [Product Info]."

Research what's happening:

"Give me the latest industry news on Generational AI"

The Art and Science of prompting

To get the best response, it's important to focus on some of the **key elements** when phrasing your Copilot prompts.

Include the right prompt ingredients

Goal

What
response do
you want
from
Copilot
Chat?

Context

Why do
you need it
and who is
involved?

Source

Which
information
sources or
samples
should Copilot
Chat use?

Expectations

How should
Copilot Chat
respond
to best meet
your
expectations?

Include the right prompt ingredients

Goal

What response do you want from Copilot Chat?

Context

Why do you need it and who is involved?

Help me write an email to inform the customer about a product change. Since the customer is not a global administrator, I need to reference the URL that describes the change, and provide clear and concise information.

Which information sources or samples should Copilot Chat use?

Source

How should Copilot Chat respond to best meet your expectations?

Expectations

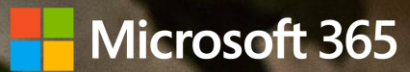
Art of Prompting

Elements of a Great Prompt

Instruction	Tell me about this or do that
Role	an identity that the AI is expected to emulate, act like, or duplicate in it's reply – “act like a...”
Context	show the AI more info about where/what it is – could be data, examples, previous articles, etc. “What are video codecs?” vs. “Can you create an outline for a 20 minute tutorial to teach support engineers about video codecs?”
Tone/Style Information	tone of writing – serious, academic, empathetic, inspiring, can be “write like this examples”
Formatting Information	table, markup language, code, etc.
An Example or Examples	give it data to show what you want – the more the better – above 20 not helpful



Copilot in Teams Overview



How to Get Started...





Ad-hoc Meetings

Standard Teams Meeting

Chat and Channel Meetings



Ad Hoc Meetings/ Meet Now



Activity

Chat

Teams

Calendar

Calls

OneDrive

...

+

Calendar

Today < > June 2025

08 Sunday

09 Monday

10 Tuesday

11 Wednesday

12 Thursday

13 Friday

14 Saturday

8 AM

9 AM

10 AM

Join with an ID

Meet now

+ New meeting

Week

Chat

People

Raise

React

View

Copilot

Apps

More

Camera

Mic

Share

Leave

Start transcription to use Copilot

You can ask Copilot for meeting notes, action items, and more—all generated by AI.

Dismiss

Turn on

Agreement is needed first

We'll turn off everyone's mic, camera, and content sharing until they agree to the use of their audio and video. [Privacy Policy](#)

Cancel

Continue

What language is everyone speaking?

Select the correct language to ensure the accuracy of features that process audio.

Spoken language


English (US)

Cancel

Confirm

Ad Hoc Meetings/ Meet Now





Chat

People

Raise

React

View

Copilot

Apps

More

Camera

Mic

Share

Leave

Transcription has started

Started by you. We've asked everyone if they'll agree to be recorded and transcribed. [Privacy policy](#)

MA

Invite people to join you

Copilot

❖ **Let AI handle the busywork**

Copilot can generate notes, list tasks, and much more-so you don't have to.

🔍 **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.

Ask me anything about this meeting

More prompts

Starting Transcription in Teams Meeting : Adhoc/Meet Now



Activity

Chat

Teams

Calendar

Calls

OneDrive

Copilot

Viva Learning

...

Apps

Calendar

March 2026

2324252627281

2345678

9101112131415

16171819202122

23242526272829

303112345

My calendars

Calendar

Show all

Search (Ctrl+E)

March 2-6, 2026 (Week 10)

Work week

Filter

Meet now

New event

New Calendar

	2 Monday	3 Tuesday	4 Wednesday	5 Thursday	6 Friday
9 AM					
10 AM				SLG East Region: Top Tc	East SLG CSU MW (Jessica Microsoft Teams Meeting Jessica Raile)
11 AM			[Microsoft Non-Federal Only] - Microsoft 365 Holistic Security Learning Path - Office Hours Microsoft Holistic Security Learning Path		
12 PM			Entra Expert Connect (EMEA/Americas) Microsoft Teams Meeting Entra Identity Champs (Azure AD)	Helium Renewal Date 6th of every month ganymedec	US Gov Identity Weekly Meetup - ****NEW CHANNEL MEETING*** Microsoft Teams Meeting US Gov Identity
1 PM					
2 PM					
3 PM			Learn: Public Sector Speaker Series Microsoft Teams Meeting Public Sector Corp HQ ROB		SLG AI Power Hour Microsoft Teams Meeting SLG ROB Meeting
4 PM					
5 PM			Money Talks/No Lazy Dollars Money Talk Series Discussion of all things money /No Lazy Dollars		
6 PM					

Standard Meeting



Join with an ID

Meet now

New meeting

Week

10 Tuesday	11 Wednesday	12 Thursday	13 Friday	14 Saturday
Utility tax rates Finance / Residential Taxes Finance				

New meeting

Details

Scheduling Assistant

Show as: Busy

Category: None

Time zone: (UTC-05:00) Eastern Time (US & Canada)

Response options

Sensitivity: None

Add title

Add required attendees

6/8/2025 5:00 PM → 6/8/2025 5:30 PM 30m All day

Does not repeat

Add channel

Add location

Online meeting

Type details for this new meeting

Add an agenda

Meeting options

Meeting chat

On

Q&A

Organizers can customize Q&A to allow anonymous posts, review questions before publishing, and more. Learn about Q&A.

Recording & transcription

Copilot and other AI

Recording & transcription

Record and transcribe automatically

This will also turn on transcription.

Who can record and transcribe

Organizers, co-organizers, and presenters

Copilot and other AI

Allow Copilot

Only during the meeting

Options

Who can bypass the lobby?

People in my org and guests

Record and transcribe automatically

More options

Standard Meeting



Meeting options

Meeting access

Roles

Production tools

Participation

Recording & transcription

Copilot and other AI

Meeting chat

On

Q&A

Organizers can customize Q&A to allow anonymous posts, review questions before publishing, and more. Learn about Q&A.

Allow reactions

Allow attendance report

Recording & transcription

Record and transcribe automatically

This will also turn on transcription.

Who can record and transcribe

Organizers, co-organizers, and presenters

Copilot and other AI

Allow Copilot

During and after the meeting

Apply

New meeting

Details

Scheduling Assistant

How as: Busy

Category: None

Time zone: (UTC-05:00) Eastern Time (US & Canada)

Response options

Sensitivity: None

Copilot for M365

Diego Siciliani

6/8/2025

4:30 PM

6/8/2025

5:00 PM

30m

All day

Suggested: 1:00 PM-1:30 PM 1:30 PM-2:00 PM 2:30 PM-3:00 PM

Does not repeat

Add channel

Add location

Online meeting

B I U S A Paragraph

Type details for this new meeting

Copilot for M365 1

Agenda

Copilot Overview

Meeting notes

Who can bypass the lobby?

People in my org and guests

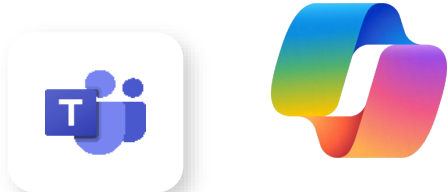
Record and transcribe automatically

More options

Send

Close

Scheduling Meeting in Teams + AI options



MACAAD EAC SAC TAC Purview Create CPCChat Mail Word Excel Od4B PowerAutomate Teams Viva Stream Config MDCPA OfficeOnWeb

Search (Ctrl+Alt+E)

Calendar

Today < > June 2025

02 Monday

03 Tuesday

04 Wednesday

05 Thursday

06 Friday

3 PM

4 PM

5 PM

6 PM

7 PM

8 PM

9 PM

10 PM

11 PM

Meeting with Customer

Microsoft Teams Meeting

Join with an ID

Meet now

+ New meeting

Work week

Chat and Channel Meetings



David Shih Chun, Jeff

Chat Shared

Meet now 3

David Shih Chun Liu Thursday 12:42 PM

also, not sure if u saw the note -- the reason we mmentioned Classic OL (whethr in Teams module or in the upcoming OL one) is bc PAT still has users on Classic so Keith asked that we cover those (but try to sway them to all the fancy stuff in New OL by showing them CP features there)

Thursday 12:43 PM

Yes i covered both today

David Shih Chun Liu Thursday 12:43 PM

Navin Pokhrel 6/5/2025 12:42 PM

I am customizing myself

ok so i will change the loop & the deck slide (2) with session schedules updated for thurs with ur name

Navin Pokhrel 6/5/2025 12:43 PM

Yes i covered both today

ya my point is for FTC i dont believe they are using Classic -- so u can quickly skip over it if u want

Thursday 12:44 PM

i will just hide it if they dont have it

no value to showing that there

Thursday 1:01 PM

Do you have deck ready for Excel

i would love to take a look

Copilot

Get key info from the chat

Copilot can answer questions and summarize the conversation.

Try out all the prompts

Prompts make it easy to get the info you need.

It's your Copilot

Other people in the chat can't see this conversation.

Highlights from the past 7 days

Copilot AI generated Thursday 12:45 AM

Fri, May 30 - Sun, Jun 1

Navin Pokhrel, David Shih Chun Liu, and Jeff Furetti discuss the County pilot engagement, including time logging, upcoming activities, and coordination for scoping calls, while addressing workload management and ensuring effective communication within the team.

Key takeaways

- David Shih Chun Liu mentioned that Jeff Furetti and Navin Pokhrel will be closing out the RMOT by the end of the day and requested to log any time spent on attending the scoping meeting.
- Navin Pokhrel created a Loop for and shared it with the team, outlining the next steps including setting up a scoping call with the customer and detailing various activities for the pilot engagement.
- Navin Pokhrel emphasized the importance of communication if the workload becomes overwhelming and reminded the team of other customer responsibilities.

Tim Johnson 11/8/2024 11:31 AM

Just an FYI that New Outlook is now considered GA for GCC

Just a heads up that New Outlook went General Availability on November 4th for GCC customers and should have received notice in MC923410. Just to callout a few key items in part of this notice (underlines are mine).

On November 4, 2024, the new Microsoft Outlook for Windows will transition from the Preview phase to General Availability for GCC moderate accounts. This milestone will not affect existing users who continue to use classic Outlook for Windows; however, GA status helps organizations move forward with their migration plans. A future announcement will cover General Availability for other US Government clouds (GCC High and DoD) and availability in other sovereign clouds.

The new Outlook continues to be an opt-in experience. Please note that this update does not change any settings for your organization. will not automatically switch users from the classic version of Outlook for Windows. and will not introduce any disruption.

see more

Open 4 replies from Tim Johnson, Brad Beran and Glenn Blinnckmann

Tim Johnson 11/8/2024 11:58 AM

You still can.

Brad Beran 11/8/2024 1:09 PM Edited

Are there any good resources anyone is using to share with their customers on the benefits of New Outlook vs classic? Lots of people not so eager for the change out there

Tim Johnson 11/8/2024 1:30 PM

The following is basically the primary New Outlook hub which includes "Explore the benefits of new Outlook" [New Microsoft Outlook for Windows - Microsoft Adoption](#) and related [Feature comparison between new Outlook and classic Outlook - Microsoft Support](#)

The new Outlook brings the speed of our latest technology into the performance and reliability of a Windows desktop...

adoption.microsoft.com



Chat and Channel Meetings

How to migrate a reports library from SharePoint 2016 to SPO

General

Microsoft Learn

for migration.

learn.microsoft.com

Last read

Alex Talarico

5/21 11:47 AM

Edited

There isn't a great solution to migrate SSRS reports (i.e. RDL / RSDS files) as SSRS is no longer integrated within SharePoint.

For one customer I wrote a custom PowerShell script that accessed each of these reporting files at the source and moved them to the destination on premises PBI server using rs.exe and a modified migration script (which I published into GitHub) both links below:

[Sample Reporting Services rs.exe script to copy content between report servers - SQL Server Reporting Services \(SSRS\) | Microsoft Learn](#)

GitHub script: [sql-server-samples/samples/features/reporting-services/ssrs-migration-rss at master · microsoft/sql-server-samples · GitHub](#)

Microsoft Learn

Sample Reporting Services rs.exe script to copy ...

Learn how to copy content items and settings from one SQL Server Reporting Services report server to another by...

learn.microsoft.com

♥

Alex Talarico

5/21 11:53 AM

For your scenario, which is to move to SPO, your report server files will no longer be hosted on SharePoint - instead you'd need to move to PBI server on premises fist with the scripts I mention, and then jump these from there into PBI online.. even then, stored passwords don't come across, schedules and other settings may not come across ... with all the manual steps and dev requirements, the best option - in my honest opinion - would be to upload the report files to PBI Online and re-configure, republish, re-create any of the things that don't work when tested - simple reports come across relatively well, but in some cases it's a full rebuild for complex reports. This is because some reports have sub-reports or other linking mechanisms that just don't migrate well, and instead it'd be less effort to rebuild with newer techn.

Mariel Williams

5/21 12:00 PM

Thank you so much Alex for this detailed Info and for the sample script you shared. I will let the customer know. I may ping you on the side if they have follow up questions. 🙏

Reply in thread

🔗

😊

✍️

📎

+

➡️

General

Go to channel

🔍

🔔

Copilot

Get key info

Copilot can summarize the conversation and key takeaways.

Try out all the prompts

Prompts make it easy to get the info you need.

It's your Copilot

Other people in the channel can't see this conversation.

Today

Highlights from this conversation

Copilot

AI generated

6:05 AM

Wed, May 21

Here are the highlights from the conversation:

- **Mariel Williams** asked for a workaround to migrate a reports library from SharePoint 2016 to SharePoint Online (SPO) using SPMT PowerShell commands. ¹
- **Alex Talarico** suggested using a custom PowerShell script to move reporting files to an on-premises Power BI (PBI) server and then to PBI Online. ²
- **Alex Talarico** recommended uploading report files to PBI Online and reconfiguring them due to potential migration issues. ³
- **Mariel Williams** thanked Alex for the detailed information and sample script. ⁴

👍 🗨️

Highlights from this conversation

Ask me about this conversation

➡️

Chat and Channel Meetings



Search | Microsoft 365 Copilot x Teams and Channels | General | M x Home - Microsoft 365 admin cent x Meeting policies - Microsoft Team x Manage Microsoft 365 Copilot in x +

https://teams.microsoft.com/v2/

Stay in the know. Turn on desktop notifications. Turn on

Teams ... +

General Posts Files Notes Channel Calendar +

Activity

Chat

Teams

Calendar

Calls

OneDrive

Apps

▼ Your teams

SA 2018 Safety Audit

General

2018 Audit Planning

2018 Delivery

2018 Findings

2018 Recommended Actions

DS District 9 Road Safety Audit

General

Audit Planning

Audit Secret

Delivery

Findings

Recommended Actions

Survey

F Finance

General

See all channels

Copilot CoE

General

Ask Us Anything

Prompt Buddy Announcement

Share Your Prompt

CH Cash Handling Audit Planning

General

CB CDOT Bonds Mgmt Audit

General

Jordan Miller 11/26/24 8:45 PM

Hi Team, we are conducting an assessment of CDOT's Safety regulations against industry standards. This is a long-term project with a lot of moving pieces, so if you have any questions, please ask.

Open 4 replies from Nestor Wilke, Jordan Miller and Johanna Lorenz

Nestor Wilke 11/26/24 8:45 PM

Johanna Lorenz and Diego Siciliani, let's sync to discuss potential financial outliers for this case. Jordan Miller - when is the kickoff meeting? Let's get that scheduled asap so the team can hit the ground running.

Jordan Miller 11/26/24 8:45 PM

Nestor Wilke, just sent the invite for the kickoff. I've already started pulling document sfor the planning crew. Johanna and I have already discussed onsite visits. Can you think of anything I'm missing?

Nestor Wilke 11/26/24 8:45 PM

Sounds good. I'm going to pull you into my sync with Johanna and Diego for visibility.

Reply

MOD Administrator 9:50 AM

Meeting in "General" ended

Reply

Start a post

69°F Cloudy

Search

9:52 AM 6/3/2023

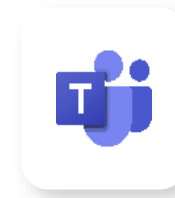


Now Copilot for Teams has Started...

Now Let's see what else we can do next...



Copilot in Teams During Meetings



1: Select Copilot

2: Enter a prompt

3: Review the results

Copilot in Teams Meeting (General)

01:52

Chat People Rooms Copilot Apps More Camera Mic Share Leave

File Home Insert Draw Design Transitions Animations Slide Show Record Review View Add-ins Help Copilot

Clipboard Paste New Slide Reuse Slides Layout Reset Section Slides Font Paragraph Drawing Editing Find and Replace Replace Fonts Select Dictate Sensitivity Add-ins Designer Copilot

TIPS WHEN USING COPILOT

LEARN	CREATE	SUMMARIZE	TRANSFORM	EDIT	ANALYZE	CATCH-UP
You want Copilot to teach you about a newly assigned internal project that is unfamiliar to you.	You want Copilot to write something new for you, such as a slogan, a caption, a story, etc.	You want Copilot to condense a long text into a shorter one, such as a summary, an abstract, a headline, etc.	You want Copilot to change the format of a deliverable so you can make it consumable for your leadership team.	You want Copilot to improve the quality or readability of a text, such as grammar, spelling, punctuation, etc.	You want Copilot to extract or provide some information or insight from a business-related data set.	You want Copilot to catch you up on the key information and updates you missed.
Example: What is Project Falcon and who are the key stakeholders working on it?	Example: Write a catchy slogan for a new brand of toothpaste that whitens teeth and freshens breath	Example: Write a session abstract of this presentation.	Example: Transform this Word file into a five slide PowerPoint presentation.	Example: Edit this sentence to be more concise: "As we approach the end of 2023, the retail industry is monitoring consumer spending in Australia."	Example: How should I think about pricing product if we have two options: \$10?	Example: Provide a summary of the key information and updates you missed.

Copilot

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.

Today

What can I use Copilot for?

Copilot 3:39 PM

You can use Microsoft 365 Copilot for various tasks, including:

- Learning new information.
- Writing new content.
- Summarizing long documents.
- Changing the delivery style of content.
- Editing documents.
- Analyzing and extracting information from documents.
- Catching up on key information.

AI-generated content may be incorrect

Recap meeting so far

Explain how Copilot can help with learning new information

How does Copilot change the way content is delivered?

Ask me anything about this meeting

Copilot in Teams Meeting only Mode..

Copilot in Meeting Only- Test (General)

Microsoft

00:45

Chat

People

Raise

React

View

Notes

Rooms

Copilot

More

Camera


Mic

Share

Leave

Copilot is available in this meeting

By participating, you agree to Copilot processing your content (such as your audio and video) during this meeting to generate summaries and responses for the duration of the meeting. This temporary data is deleted after the meeting ends. [Privacy Policy](#)



Waiting for others to join...

Copilot

Content isn't saved

The content from Copilot is only available while this pane is open during the meeting.

Let AI handle the busywork

Copilot can generate notes, list tasks, and much more-so you don't have to.

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.

View prompts

Ask me anything about this meeting

Copilot After-Meetings



Microsoft Digital

Post meeting usage

1: Select a recording

2: Select Recap

3: Select Copilot

Thursday, December 5, 2024 7:00 AM - 8:30 AM

Open in Stream

Copilot

Speakers # Topics Chapters

David VanGilder

Is this info useful?

Content

Attendance

Notes AI summary Mentions Transcript

habits and practical uses of Copilot in the M365 suite, focusing on Teams, Outlook, and Teams meetings. He emphasized the importance of creativity in modifying prompts to suit individual business needs. ⁹

- **Saving and Bookmarking Prompts:** David explained how to save and bookmark prompts in Biz chat, highlighting the benefits of organizing and accessing prompts efficiently. ³
- **Using Copilot for Document Search:** David demonstrated how to use Copilot to search for specific documents and information within files, emphasizing the use of quotation marks for refined searches. ⁴
- **Meeting Recap and Notes:** David showed how to use Copilot to generate meeting notes and recaps, both during and after meetings, to stay updated on discussions and action items. ⁵
- **Summarizing Emails with Copilot:** David highlighted the functionality of Copilot in summarizing lengthy email threads and drafting professional emails, making communication more efficient. ⁶
- **Resources and Training:** David provided information about resources and training available for Copilot, including the Copilot prompt library and training sessions. ⁷

AI-generated content may be incorrect

View prompts

Ask me anything about this meeting

How to use: Copilot in Teams for chat



Sample use cases

- Catch up on a chat thread with a summary or by getting key points and action items
- Draft a new chat entry in the thread

In the Teams chat window

- Rewrite a draft and adjust for length and tone

Use the Copilot chat pane to

- Ask questions about the content of the chat – does not work in Channels
- Summarize over a period of time
- Ask about decisions, open items, tasks
- Ask what a specific person said
- Ask about links

When creating a chat entry click on the Copilot icon to show the **Rewrite** and **Adjust** prompts when drafting a new chat

Click on the **Prompt Guide** icon to show the prompts to edit a slide or learn about the presentation

How to use: Copilot in Teams during a meeting



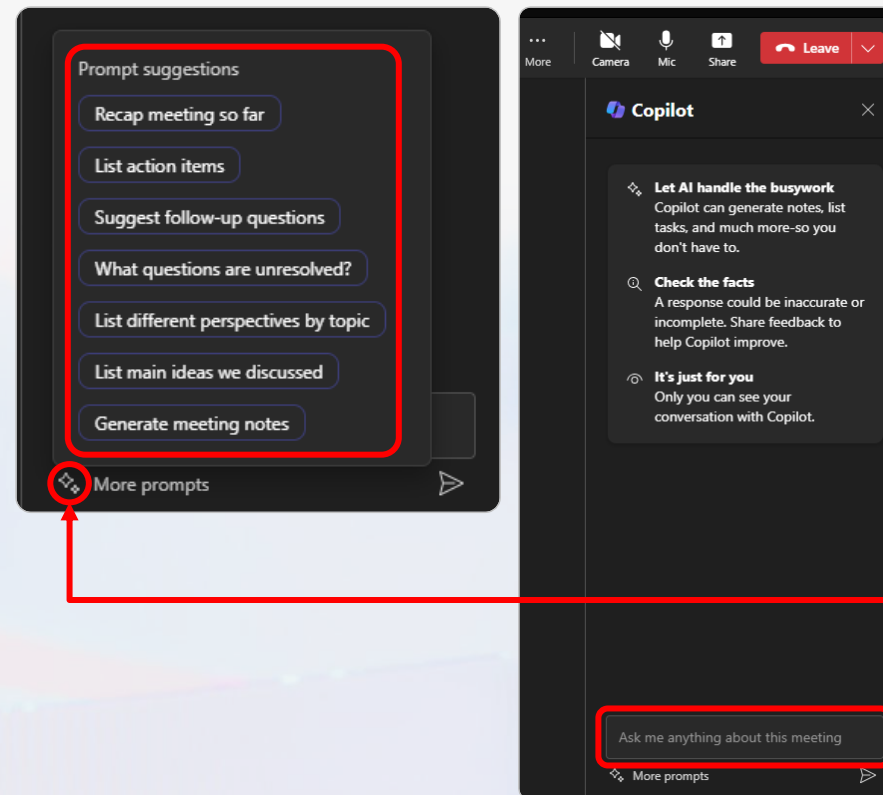
Note the specific prompts shown may vary

Sample use cases

- Get help during a meeting with a summary, key points, sentiment, or potential questions
- Catch up on a meeting with a summary or by asking questions
- Works during 1:1 and group calls, Meet Now, Scheduled private meetings, recurring meetings, Channel meetings

Use the Copilot chat pane to

- Get a summary of the meeting so far
- Key discussion points
- Who said what or what people said
- Where do people disagree
- Suggest action items





How to use: Copilot in Teams after a meeting

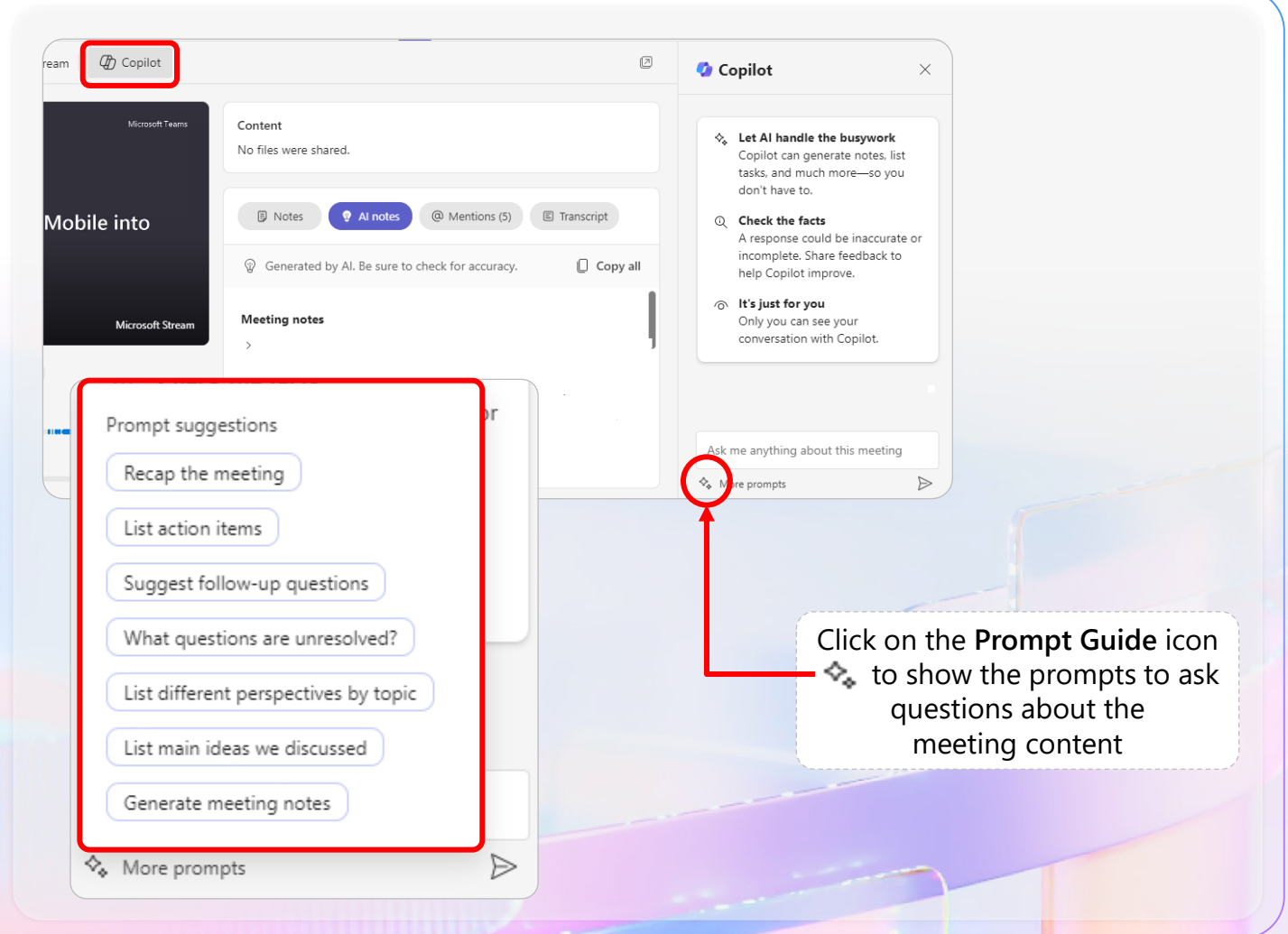
Note the specific prompts shown may vary

Sample use cases

- Catch up on a meeting with a summary or by asking questions
- Works for scheduled meetings with a transcript (1:1 and group)

Use the Copilot chat pane on the Recap tab to

- Recap the meeting
- List action items
- Follow up questions
- Highlight the different perspectives on a topic
- List main ideas



What Happens to recordings and Transcripts



For Non-Channel (Standard Teams Meeting)

- **Stored in OneDrive of Person who clicked Record**
- **OneDrive→ Recordings**

For Channel Teams Meeting

- **Teams Channel->Files-> recordings**

The screenshot displays the Microsoft Teams interface. At the top, a header bar shows the 'Recordings' folder, the date 'March 24, 2022', the user 'Navin Pokhrel', '46 items', and the privacy setting 'Private'. Below this, a list of recordings is shown:

Recording Name	Time	App	Size	Share Status	Shared By
Test200-20250605_001048-Meeting Trans...	Yesterday at 09:...	SharePoint App	178 KB	Shared	SharePoint App shared with Navin Pokhrel - 10h ago
Webinar 3 Copilot for Chat-20250605_030...	Yesterday at 08:...	SharePoint App	5.43 MB	Shared	SharePoint App shared with Navin Pokhrel - Yesterday at 11:01 PM

Below the recordings list, there are two overlapping windows. The 'Transcript' window on the left shows a search bar, a 'Download' button, and a list of transcript items. The 'Copilot' window on the right shows a search bar with the text 'Show me the parts where...', a 'List the main ideas' button, and a list of main ideas we discussed:

- Project Falcon Launch Readiness
 - Considering delaying the launch by one month to ensure proper testing and user experience. [2:21](#)
 - Speeding up beta testing by two weeks with extra resources and incentives. [4:46](#)
 - Proposing a two-week launch delay as a compromise. [5:45](#)
- Marketing Strategy for Project Falcon Launch Event
 - Publishing a teaser video next week. [3:20](#)
 - Determining the date for the updated public launch event. [6:04](#)
 - Selecting an executive spokesperson for the event. [6:04](#)

At the bottom of the Copilot window, there is a search bar with the text 'Ask a question or type / for ideas' and a 'List the main ideas' button.

**Now Lets take a look at
few more examples...**



- **Recap Meetings**
- **Track Action Items Automatically**
- **Be Specific**
- **Plan Agendas Without the Hassle**
- **Search Smarter, Not Harder**

BOOST YOUR PRODUCTIVITY

Adopt these hacks and tools to transform your workplace efficiency.





Recap meetings

Use Copilot to Summarize key takeaways, track actions, and highlight decisions from any recorded meetings

Prompt: "Summarize the last meeting and list all actions items assigned to me."



Recap meetings

M365 Copilot Workshop - Security and Compliance Deep Dive

ChatSharedRecapSpeaker CoachQ&AMeeting Whiteboard

1, 2025 9:00 AM - 12:00 PM

ShareOpen in StreamCopilot

Content

No files were shared.

NotesAI summaryMentionsTranscriptSales

Generated by AI. Check for accuracy.

Copy all

Meeting notes

- > **Introduction and Session Overview:** Navin introduced the session, highlighting the focus on governance, security, and compliance within M365, and emphasized the importance of discussing measures to guide and govern AI applications.
- > **Copilot Enterprise Data Protection:** Navin explained that Copilot Enterprise Data Protection ensures that Microsoft's security measures are respected, and data is not used to train AI models without explicit permission. This protection helps mitigate risks and ensures data is handled securely.
- > **Microsoft Intra ID Governance:** Navin discussed the importance of Microsoft Intra ID in managing authorized user access, preventing over-permissioning, and protecting endpoints. He emphasized the need for conditional access policies and managing risky users to ensure secure access to the environment.
- > **Conditional Access Policies:** Navin highlighted the significance of conditional access policies in managing user access to M365 data, including Copilot. He explained the need to consider browser policies, device policies, and app policies to ensure secure access and prevent unauthorized use.
- > **Access Review and Delegation:** Navin introduced the concept of access review in Microsoft Intra, which helps manage guest users and inactive groups by delegating permission management to group or site owners. This ensures proper oversight and reduces the risk of over-permissioning.
- > **Microsoft Purview Overview:** Navin provided an overview of Microsoft Purview, explaining its components, including data classification, labeling, rights management, and unified logging. He emphasized the importance of understanding and implementing these components to ensure data protection and compliance.
- > **Sensitivity Labels and Auto-Labeling:** Navin discussed the use of sensitivity labels and auto-labeling to classify and protect data. He explained how these labels work with DLP policies to prevent unauthorized sharing and ensure sensitive information is handled appropriately.

Recap meetings

M365 Copilot Workshop - Security and Compliance Deep Dive

ChatSharedRecapSpeaker CoachQ&AMeeting WhiteboardSales+

Mar 21, 2025 9:00 AM - 12:00 PM

ShareOpen in StreamCopilot

Content

No files were shared.

NotesAI summaryMentionsTranscriptSales

Generated by AI. Check for accuracy.

Copy all

Meeting notes

>

Introduction and Session Overview: Navin introduced the session, highlighting the focus on governance, security, and compliance within M365, and emphasized the importance of discussing measures to guide and govern AI applications.

>

Copilot Enterprise Data Protection: Navin explained that Copilot Enterprise Data Protection ensures that Microsoft's security measures are respected, and data is not used to train AI models without explicit permission. This protection helps mitigate risks and ensures data is handled securely.

>

Microsoft Intra ID Governance: Navin discussed the importance of Microsoft Intra ID in managing authorized user access, preventing over-permissioning, and protecting endpoints. He emphasized the need for conditional access policies and managing risky users to ensure secure access to the environment.

>

Conditional Access Policies: Navin highlighted the significance of conditional access policies in managing user access to M365 data, including Copilot. He explained the need to consider browser policies, device policies, and app policies to ensure secure access and prevent unauthorized use.

>

Access Review and Delegation: Navin introduced the concept of access review in Microsoft Intra, which helps manage guest users and inactive groups by delegating permission management to group or site owners. This ensures proper oversight and reduces the risk of over-permissioning.

>

Microsoft Purview Overview: Navin provided an overview of Microsoft Purview, explaining its components, including data classification, labeling, rights management, and unified logging. He emphasized the importance of understanding and implementing these components to ensure data protection and compliance.

>

Sensitivity Labels and Auto-Labeling: Navin discussed the use of sensitivity labels and auto-labeling to classify and protect data. He explained how these labels work with DLP policies to prevent unauthorized sharing and ensure sensitive information is handled appropriately.

Copilot

Today

Recap the meeting

Copilot AI generated 6:37 PM

Key Topics:

>

Introduction to Session: Navin introduced the second session of the copilot workshop, focusing on governance, security, and compliance within M365, and outlined the agenda for the discussion. ①

>

Enterprise Data Protection: Navin explained Microsoft's commitment to enterprise data protection, ensuring that data within M365 and copilot is secure and not used to train AI models without explicit permission. ②

>

Microsoft Intra ID Governance: Navin discussed the importance of Microsoft Intra ID in managing identity and access policies to prevent over-permissioning and protect organizational data from unauthorized access. ③

>

Conditional Access Policies: Navin highlighted the role of conditional access policies in controlling access to organizational data, emphasizing the need to manage browser policies, device policies, and app policies effectively. ④



List action items

What are the key benefits of using SharePoint Advanced Management tools?

Explain the process for activating SharePoint Advanced Management tools.

Ask me anything about this meeting

Recap meetings

 Copilot 

Today

Recap the meeting

Copilot AI generated 6:37 PM

Key Topics:

- **Introduction to Session:** Navin introduced the second session of the copilot workshop, focusing on governance, security, and compliance within M365, and outlined the agenda for the discussion. 1
- **Enterprise Data Protection:** Navin explained Microsoft's commitment to enterprise data protection, ensuring that data within M365 and copilot is secure and not used to train AI models without explicit permission. 2
- **Microsoft Intra ID Governance:** Navin discussed the importance of Microsoft's access policies to prevent unauthorized access to organizational data from external sources. 3
- **Conditional Access Policies:** Navin discussed the importance of conditional access policies to protect organizational data, email, and browser policies, device management, and more. 4

What are the key benefits of using Copilot?

Explain the process for activating Copilot.

Prompt suggestions

Recap the meeting

List action items


Suggest follow-up questions


What questions are unresolved?



List different perspectives by topic

List main ideas we discussed

Generate meeting notes



Ask me anything about this meeting 

 Copilot 

Suggest follow-up questions

Copilot AI generated 6:58 PM



What questions can I ask?

SharePoint Advanced Management (ask [redacted]):

- What specific features of SharePoint Advanced Management are most critical for our organization?
- How can we ensure proper training and adoption of these features among site owners?

Sensitive Information Types and False Positives (ask [redacted]):


- How can we effectively reduce false positives in sensitive information types without compromising security?
- What are the best practices for tuning sensitive information types to better fit our organization's needs?


 

Recap the meeting

What best practices should I follow to reduce false positives in sensitive information types?

How can I ensure proper training and adoption of SharePoint Advanced Management features among site owners?



Ask me anything about this meeting 



Track Action Items

Use Copilot to extract action items from meetings, chats, and posts- so we don't miss a thing.

Prompt: "What action items were assigned to me this week in this meeting /."



Track Action items

Summarize my last project meeting / and list action items

Summarize my last Project meeting [M365 Copilot Office Hours - Copilot in Power Point](#) and list action items

Copilot

Here's a detailed summary of your most recent project meeting, the [M365 Copilot Office Hours - Copilot in Power Point](#), held last Thursday from 10:00 to 11:00 AM and organized by [REDACTED].

Meeting Recap

This session focused on demonstrating how to effectively use Microsoft Copilot within PowerPoint, building on prior sessions that covered Word, prompt engineering, and Copilot Chat. [REDACTED] the session, offering a hands-on walkthrough of prompt-based slide creation, formatting, translation, and coaching features.

Participants were encouraged to follow along using a shared ZIP file containing example prompts and documents. The session emphasized the importance of context, clarity, and specificity when crafting prompts using the GCSE framework (Goal, Context, Source, Expectation).

The team also explored advanced features such as:

- Creating presentations from Word documents using context-aware prompts.
- Generating speaker notes and organizing decks into sections.
- Translating entire presentations into other languages.
- Identifying key slides and using Designer to enhance visual appeal.
- Using Copilot to coach users on styling and formatting based on audience type.

The session concluded with an interactive exercise where attendees practiced generating presentations using role-specific prompts.

Main Ideas Explored

- **Prompt Engineering:** Reinforced the GCSE framework for crafting effective prompts.
- **Copilot in PowerPoint:** Demonstrated how to create, format, and enhance presentations using Copilot.
- **Translation & Accessibility:** Showcased Copilot's ability to translate decks and tailor content for multilingual audiences.
- **Design & Coaching:** Highlighted Copilot's design suggestions and coaching capabilities for different presentation contexts.

Track Action items

Create a draft agenda for next [Meeting]based on previous discussion

WorkWeb

Copilot

Here's a draft agenda for your upcoming meeting, [NC Copilot : Leaders & Agency Liaison Review](#), scheduled for next Wednesday from 9:00 AM to 12:05 PM [\[1\]](#).

Agenda: NC Copilot : Leaders & Agency Liaison Review

Meeting Details

- Organizer: [Jim Livornese](#)
- Date & Time: Wednesday, 9:00 AM - 12:05 PM
- Location: Microsoft Teams Meeting
- Meeting Link: [Join the Meeting](#)
- Dial-in Number: +1 323-849-4874, Conference ID: 219 096 308#

Attendees

- [Sheri Reed](#)
- [John Brady](#)
- [Anna Dockum](#)
- [Josh Meredith](#)
- [George Gonsalves](#)
- [Nathaniel, Ashish R](#)
- [Navin Pokhrel](#)
- [Nikki Dahi](#)
- [Scott Sample](#)
- [Marin, Karen A](#)

Agenda Items

1. Welcome and Introductions
 - Brief introduction of attendees and their roles.
 - Overview of meeting objectives.
2. Review of Current Projects
 - Status updates on ongoing projects.
 - Discussion on recent achievements and challenges.
3. Copilot Integration Updates
 - Presentation on the latest Copilot features and enhancements.
 - Demonstration of Copilot in PowerPoint and other applications.
4. Agency Liaison Feedback
 - Gathering feedback from agency representatives.
 - Addressing concerns and suggestions for improvement.
5. Action Items and Next Steps
 - Identification of key action items.
 - Assignment of responsibilities and deadlines.
6. Open Discussion
 - Open floor for any additional topics or questions.
 - Encouraging collaborative brainstorming and problem-solving.
7. Closing Remarks
 - Summary of key takeaways.
 - Confirmation of next meeting date and time.

Important Notes

- Preparation: Review the latest Copilot features and prepare any questions or feedback.
- Documentation: Ensure all relevant documents and presentations are accessible during the meeting.
- Follow-Up: Plan for follow-up actions and communications post-meeting.

Let me know if you need any adjustments or additional details for the agenda!

Add time allocations to the agenda

Include a section for team feedback

Message Copilot

Track Action items

Write a follow-up email to attendees summarizing today's discussion and next steps

Write a follow-up email to attendees summarizing today's discussion and next steps

Copilot AI generated 10:17 PM

Subject: Summary of Today's Copilot Workshop and Next Steps

Dear Attendees,

Thank you for participating in today's copilot workshop session. Below is a summary of our discussion and the next steps.

Summary of Today's Discussion:

- **Introduction to Session:** We focused on governance, security, and compliance within M365, outlining the agenda for the discussion.
- **Enterprise Data Protection:** Microsoft's commitment to ensuring data within M365 and copilot is secure and not used to train AI models without explicit permission.
- **Microsoft Intra ID Governance:** The importance of managing identity and access policies to prevent over-permissioning and protect organizational data from unauthorized access.
- **Conditional Access Policies:** The role of conditional access policies in controlling access to organizational data, including browser, device, and app policies.
- **Sensitivity Labels and DLP:** Discussion on the use of sensitivity labels and Data Loss Prevention (DLP) policies to protect sensitive information, including manual and auto-labeling practices.
- **Unified Audit Logs:** Tracking all activities within the tenant, including copilot interactions, and tying these logs to eDiscovery for detailed investigations.
- **Communication Compliance:** Monitoring internal and external communications for sensitive information and inappropriate content, leveraging AI and policy.

Recap the meeting

What were the key points discussed about Microsoft Purview?

Summarize the action items related to SharePoint file sharing and site management



Ask me anything about this meeting



Track Action items

What Decisions were made in the last meeting /

Today

What decisions were made in the last meeting

Copilot AI generated 10:26 PM

Decisions Made in the Last Meeting:

1. Panel Composition:

- [Redacted] 1

2. Event Space Setup:

- Jim will request five chairs for the front of the event space. 2

3. Email Blasts and Prompts:

- Navin will create graphics and prompts for email blasts during the event, including a welcome message, prompts during transitions, and a wrap-up message. 3

4. Room Assignments:

- Navin will assign rooms to the tracks for the event. 4

5. Pre-Event Communication:

- An email will be sent the day before the event with a digital program PDF attached. 5

6. Lunch Arrangements:

- Lunch will be provided by the sponsor, Planet Technology. 6

7. Post-Event Communication:

- A thank you message will be sent after the event, including a link to the prompt library. 7

For more details, you can refer to the meeting transcript and chat.



Recap the meeting

Summarize the responsibilities assigned to me

Provide more details about the email blasts and prompts



Ask me anything about this meeting





Be Specific

When Using Copilot in Teams, specificity helps. It helps Copilot Understand your Intent and generate more relevant content

Prompt: "What did [person] say about the topic []"



What did [person] say about [topic]? in Copilot in Teams

- Try this prompt in your next meeting

What did [person] say about [x]?

Summarize all emails, Teams chats, and meetings involving [Manager's Name] this week. Highlight key decisions, pending actions, and deadlines.

Post Meeting agenda planning in Copilot in Teams

Build an agenda for a follow up meeting based on this call. Include reference in the agenda to the conversation thread with brief summary.

How did David Address File Sharing Issue

Copilot AI generated 10:44 AM

David addressed the file sharing issue by asking Igor to upload the zip file to a shared space (seismic) so that Chad could distribute it to the participants. [1](#) [2](#) [3](#) [4](#)

Related sources from meeting chat:

- [CP EU PTC Word S3 Assets.zip.](#) [5](#)
- [CP EU PTC Word S3 Assets 1.zip.](#) [6](#)



What was David's response to Usha's concern?

Copilot AI generated 7:59 AM

David explained that the prompts are saved across all M365 apps, but they do not persist across different apps. He acknowledged that while the prompts are recorded, they may not be immediately visible in Copilot chat if they were issued in Word. He also mentioned that if audit is turned on in the organization, the prompts are kept for e-discovery purposes. [1](#)

[2](#) [3](#)



Getting Specific ... in Copilot in Teams

- Try this prompt in your next meeting

What were some concerns raised by / about "" ?

Provide more details on the use cases for [topic] that [user] explained

What were some Concerns Raised by Keith

Copilot AI generated 10:36 AM

Concerns Raised by Keith

- 1. False Positives in Content Explorer**
 - Keith expressed concerns about the overwhelming number of false positives for Social Security numbers in Content Explorer, particularly related to financial transactions, contract numbers, and vendor part numbers. He mentioned the need for adjusting sensitivity settings to reduce these false positives. [1](#) [2](#)
- 2. Limited Use of Auto Labeling**
 - Keith highlighted the limited use of auto labeling due to the risk of mislabeling documents based on false positives. He mentioned that while auto labeling is applied for the most critical data, such as Social Security numbers being sent externally, most labeling is done manually. [3](#) [4](#)
- 3. Activation of SharePoint Advanced Management Features**
 - Keith noted that the SharePoint Advanced Management features have not yet appeared in their SharePoint Admin center despite being included with Copilot. He expressed

How many licenses did Keith mentioned that they currently have for M365 for Copilot

Copilot AI generated 10:37 AM

Keith did not mention the specific number of licenses they currently have for M365 for Copilot during the meeting.

What did Navin say about possibly addressing False positives

Copilot AI generated 10:38 AM

Navin suggested making a copy of the sensitive information type (SIT) and adjusting the pattern recognition settings to address false positives. He mentioned that tuning the SIT and working with the threshold settings could help reduce false positives. Navin also indicated that there might be upcoming features to suppress certain false positives, as this has been a common issue for other customers as well. [1](#) [2](#) [3](#)

Provide some details on use cases Keith mentioned

Copilot AI generated 10:40 AM

Keith mentioned several use cases for sensitivity labels within their organization:

- Manual Labeling:** Primarily using manual labeling with policy tips to recommend appropriate labels when sensitive data is detected. [1](#) [2](#)
- Auto Labeling:** Applied for very sensitive data, such as Social Security numbers, especially when sending externally. [3](#)
- Broad Labeling:** Labels for non-sensitive information, public data, internal data, and specific business units (referred to as bureaus). [4](#) [5](#) [6](#)
- Granular Labeling:** Specific labels for internal business units, management teams, and confidential data, where access is specified for individual users. [7](#) [8](#)
- Managed Devices:** Labels applied to ensure data is accessed only from managed devices, heavily leveraged by the human resources team. [9](#) [10](#)

These use cases highlight the organization's comprehensive approach to data sensitivity and access management.



Getting Specific ... in Copilot in Teams

- Try this prompt in your next meeting

What Open Questions still needs to be addressed ?

Post Meeting agenda planning in Copilot in Teams

Build an agenda for a follow up meeting based on this call. Include reference in the agenda to the conversation thread with brief summary.

What Open Questions still needs to be addressed

Copilot AI generated 10:34 AM

Open Questions to Address

- 1. Activation of SharePoint Advanced Management Features**
 - **Question:** How can we enable SharePoint Advanced Management features in the SharePoint Admin center, and what steps are required?
 - **Reference:** Keith mentioned that these features have not yet appeared in their SharePoint Admin center despite being included with Copilot. [1](#) [2](#)
- 2. Adjusting Sensitivity Settings in Content Explorer**
 - **Question:** What specific adjustments can be made to sensitivity settings in Content Explorer to reduce false positives for Social Security numbers and other sensitive data?
 - **Reference:** Keith raised concerns about false positives related to financial transactions and the need for adjusting sensitivity settings. [3](#) [4](#)
- 3. Expanding Auto Labeling Practices**
 - **Question:** How can we safely expand the use of auto labeling without risking mislabeling documents based on

Recap the meeting

Summarize the key points discussed about Microsoft Purview

List the steps to enable SharePoint Advanced Management features

Ask me anything about this meeting

Search Smarter not Harder



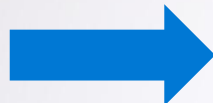


Traditional search is Outdated

Copilot Search is Context-Aware and Conversational



Where is the location of the deck [david] created for all presentations?



where is the location of the deck david created for all presentations

Copilot AI generated 8:39 AM

Wed, May 14 - Wed, Jun 4

The location of the deck created by **David Shih Chun Liu** for all presentations is stored in the US SLG SPO folder named CP_EU_Training. ¹



Can you provide me some link

Copilot AI generated 8:39 AM

Wed, May 14 - Wed, Jun 4

Here are the links shared between May 14, 2025 at 10:31:36 AM and June 4, 2025 at 3:24:56 PM:

- **PDF from PTC:** [CP EU Training PTC S1 Copilot Chat - Use Case Scenario - Licensed -.pdf](#) ¹
- **US SLG SPO folder:** [CP EU Training](#) ²

David Shih Chun Liu Chat Shared Storyline +

David Shih Chun Liu 3/14 5:53 PM

that way i dont even need to generate -- they have it in their tenant



do that

3/14 5:54 PM

yes that feature should be there in there tenant now

they are still caught up in web grounding and its risk

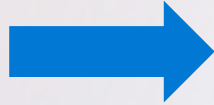
so provide contents that might help them make that decision to turn on web grounding



let me know if you have any questions





Could you help me locate the conversation where [Megan] shared the link to the NC Innovation Day Registration Excel file?



Work

Web

Could you help me locate the conversation where Megan shared the link to the NC Innovation Day Registration Excel file?

 Copilot 

I found several relevant conversations—both in email and Teams chat—where [Megan Bradford](#) shared the **NC Innovation Day Registration Excel file** with you. Here's a summary of the most pertinent ones:

1. Teams Chat: Direct File Share

In a Teams conversation from last Tuesday, [Megan Bradford](#) shared the file titled "**NCDIT Innovation Day Event Registration.xlsx**" directly in the chat. This occurred during a discussion about presenter conflicts and session planning for the event ¹.

2. Email: File Reference and Event Coordination

In an email titled [NCDIT Innovation Day Registration + Next Steps](#), Megan informed recipients that there were 186 in-person registrants and referenced the Excel file. She emphasized the need for attendees to have M365 Copilot licenses and bring laptops for real-time breakout sessions ².

Would you like me to help you retrieve the file itself or summarize the registration data?

1



Megan Bradford in chat
Conversation with Navin Po...

2

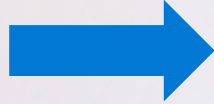


NCDIT Innovation Day ...
5/29/2025 | Megan Bradfor...





What did [person] say about [Topic] on this [meeting] who is covering it



What did Jim Say about Lunch on this meeting who is covering that

Copilot AI generated 10:50 PM

Jim mentioned that lunch will be provided by the sponsor, Planet Technology. 1

Recap the meeting Summarize the discussion about email blasts and prompts

What did Jim say about the panel composition?

Ask me anything about this meeting

Who is taking care of Prompts for email blast

Copilot AI generated 10:55 PM

Navin is taking care of creating the graphics and prompts for the email blasts during the event. 1

Recap the meeting Summarize the discussion about Copilot prompts

List the key tasks assigned to me in table format

Ask me anything about this meeting



Chat and Channel Summaries

What are Open Items ?
Summarize what I've missed

Summarize what i have issued

Copilot AI generated 10:27 AM

Tue, May 27 - Wed, Jun 4

You have missed the following:

- **Scott Walker** suggested creating a new Plan and Design VBD since the original one is still open with reports pending. ¹
- **Nate Kleven** recommended Governance, Security and Compliance or Teams Phone Foundation for administrator training. ²
- **Scott Walker** confirmed that the FTC call intended for scoping was canceled and will ping **Nate Kleven** for availability once details on the need are received. ³
- **Navin Pokhrel** needs to schedule delivery for an engagement. ⁴
- **Nate Kleven** needs to provide availability for a scoping call after 10:30 AM tomorrow. ⁵ ⁶
- **Scott Walker** needs to confirm availability for a scoping call once details on the scope are received. ⁷
- **Scott Walker** needs to decide between two options for a new Plan and Design VBD and schedule a scoping call. ¹

What are some Open items

Copilot AI generated 10:28 AM

Tue, May 27 - Wed, Jun 4

You have the following open items:

- **Scott Walker** needs to decide between Governance, Security and Compliance or Teams Phone Foundation for administrator training. ¹ ²
- **Scott Walker** needs to create a new Plan and Design VBD and schedule a scoping call. ³
- **Navin Pokhrel** needs to schedule delivery for an engagement. ⁴
- **Nate Kleven** needs to provide availability for a scoping call after 10:30 AM tomorrow. ⁵ ⁶
- **Scott Walker** needs to confirm availability for a scoping call once details on the scope are received. ⁷ ⁸

Nate, Scott Chat Shared

have some live customers. There were asking questions about roles and troubleshooting. Any recommendations?

Nate Kleven 5/27 3:31 PM



Probably Governance, Security and Compliance or Teams Phone Foundation

Scott Walker 5/27 3:32 PM



I believe I dispatched a 2 day VBD and we only used one day so far. Did I get that right?

Let me check, I know it has been some time.

Monday

Scott Walker Monday 10:57 AM



Hey **Nate Kleven**, I looked at our original Plan and Design VBD and it looks like it is still open (reports pending) but you do have 18 hours into it. So we should probably do a new one. Let me know if you have a preference from the two you suggested. Could you do a scoping call tomorrow at 2:30 Eastern? Thanks!

Yesterday

Yesterday 12:39 PM

Hi **Nate Kleven** can we schedule delivery for this engagement

can you please provide your availability for scoping call

Nate Kleven Yesterday 12:41 PM



I have anytime after 10:30AM tomorrow open

Yesterday 12:41 PM

Scott Walker do we think that might possibly work

Scott Walker Yesterday 12:51 PM



I haven't got them to send me what they need yet. I want to make sure we have a scope set. The ask is out and I will let you know as soon as I get something back

Scott Walker Yesterday 12:57 PM



I was hoping to use the FTC call yesterday to scope it but they cancelled. As soon as I get details on need - I will ping Nate for availability.





Chat and Channel Summaries

Highlights from the Past 7 Days

Highlights from the past 7 days

Copilot AI generated 8:35 AM

Mon, Jun 2 - Wed, Jun 4

Scott Walker, **Navin Pokhrel**, and **Nate Kleven** discuss scheduling a scoping call for a new Plan and Design VBD, with **Scott Walker** awaiting details on the scope before confirming availability.

Key takeaways

- **Scott Walker** suggested creating a new Plan and Design VBD since the original one is still open with reports pending, and asked **Nate Kleven** for a preference between two options and availability for a scoping call tomorrow at 2:30 Eastern. 1
- **Navin Pokhrel** asked **Nate Kleven** to schedule delivery for an engagement and requested availability for a scoping call, to which **Nate Kleven** responded with availability after 10:30 AM tomorrow. 2 3 4
- **Scott Walker** mentioned that the FTC call intended for scoping was canceled and will ping **Nate Kleven** for availability once details on the need are received. 5 6

Nate, Scott Chat Shared

have some live customers. There were asking questions about roles and troubleshooting. Any recommendations?

Nate Kleven 5/27 3:31 PM

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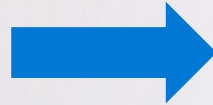
I was hoping to use the FTC call yesterday to scope it but they cancelled. As soon as I get details on need - I will ping Nate for availability.





Chat and Channel Summaries

Highlights from this conversation



Highlights from this conversation

Copilot AI generated 8:48 AM

Wed, May 21

Here are the highlights from the conversation between May 21, 2025 at 9:02:54 AM and May 21, 2025 at 12:00:31 PM:

- **Mariel Williams** asked for a workaround to migrate the reports library from SharePoint 2016 to SharePoint Online, as it is not supported by SPMT. ¹
- **Alex Talarico** suggested using a custom PowerShell script to move reporting files to an on-premises Power BI server first, then migrating them to Power BI Online. He shared links to a sample script and a GitHub repository. ² ³
- **Mariel Williams** thanked **Alex Talarico** for the detailed information and the sample script, indicating she would inform the customer and might follow up with additional questions. ⁴

→ Forward

↔ Copy link

📌 Pin

🔔 Turn on notifications

🗑 Open conversation in new window

📄 Highlights from this conversation

🔍 Mark as unread

🗣 Translate

📖 Immersive Reader

⚠ Report this message

More actions



How to migrate a reports library from SharePoint 2016 to SPO

Hi **General**, I have a customer that is migrating from 2016 to SPO using custom solution with SPMT PowerShell commands. They are asking if there is a workaround to migrate reports library since this it isn't supported by SPMT. Unfortunately, the cannot use any 3rd party migration tools. Has anyone helped their customers with this before?

This is what Copilot suggested, but I am not sure if this is correct:

Since direct migration of the Report Library is not supported, here's a workaround approach that aligns with best practices:

1. Extract Report Content

[see more](#)



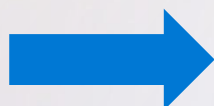
SharePoint Migration Tool supported SharePoin...
SharePoint Migration Tool table of supported list templates for migration.

learn.microsoft.com



Chat and Channel Summaries

What were some suggested Workarounds



What were some workaround recommended

Copilot AI generated 8:50 AM

Wed, May 21

Some workarounds recommended were:

- **Marcel Williams** suggested extracting report content manually or via PowerShell, recreating a modern document library in SharePoint Online, uploading the reports, and reconfiguring report connections. ¹
- **Alex Talarico** recommended using a custom PowerShell script to move reporting files to an on-premises Power BI server first, then migrating them to Power BI Online. ² ³

How to migrate a reports library from SharePoint 2016 to SPO

Hi **General**, I have a customer that is migrating from 2016 to SPO using custom solution with SPMT PowerShell commands. They are asking there is a workaround to migrate reports library since this it isn't supported by SPMT. Unfortunately, the cannot use any 3rd party migration tools. Has anyone helped their customers with this before?

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[see more](#)



SharePoint Migration Tool supported SharePoin...
SharePoint Migration Tool table of supported list templates for migration.

learn.microsoft.com

- Forward
- ↔ Copy link
- 📌 Pin
- 🔔 Turn on notifications
- 🗑 Open conversation in new window

📌 Highlights from this conversation

- 🗑 Mark as unread
- 🗑 Translate
- 🗑 Immersive Reader

⚠ Report this message

More actions





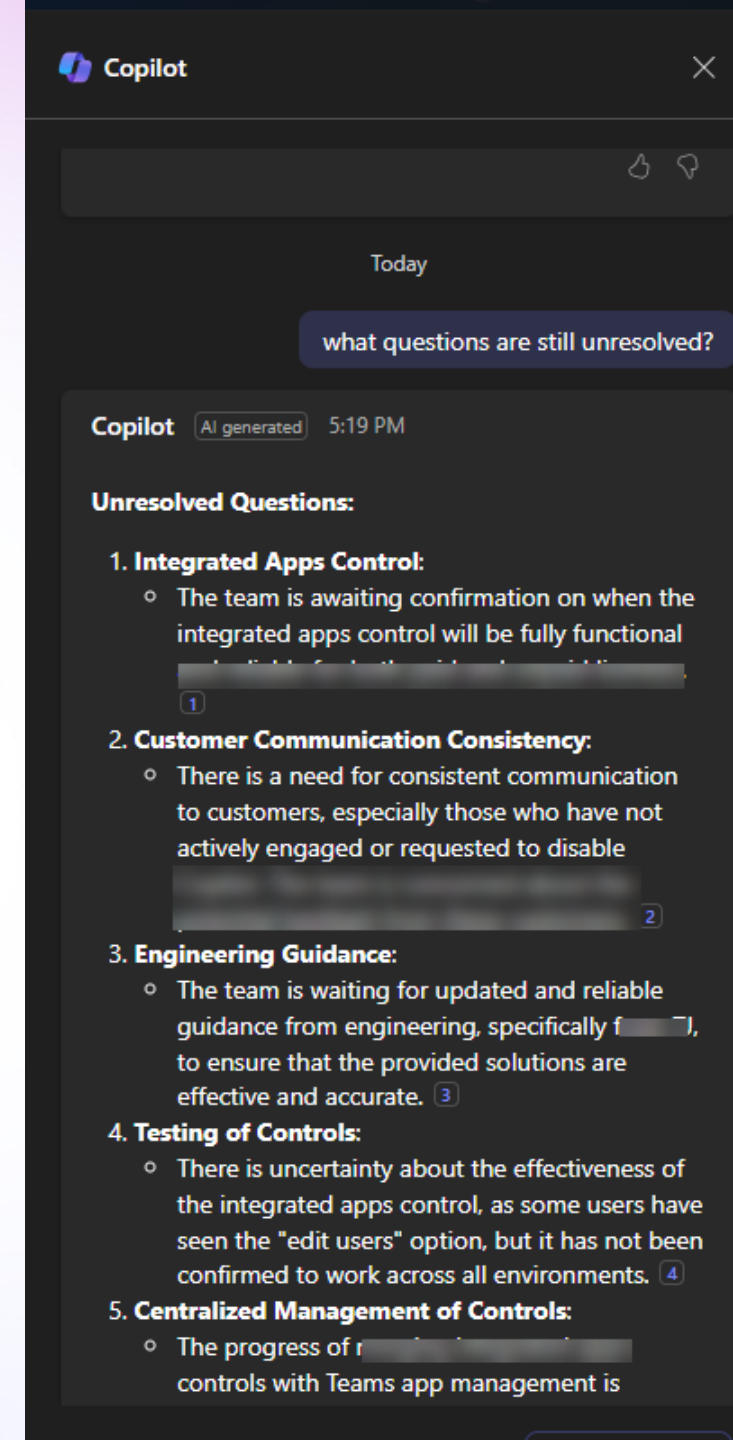
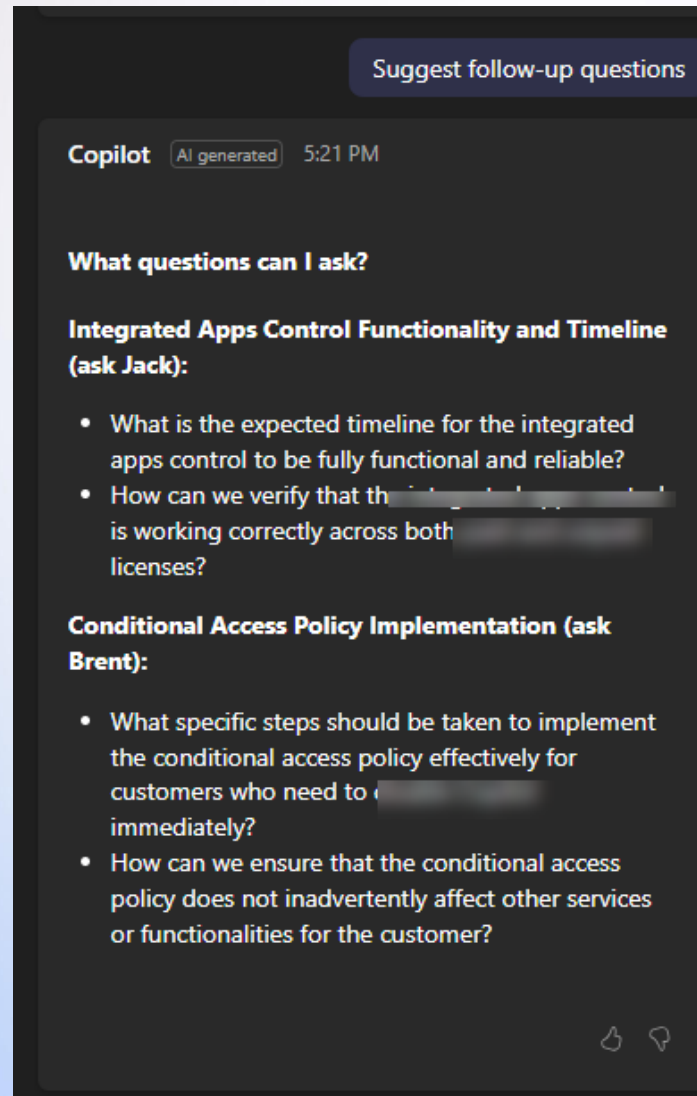
Identify sentiment or concerns in Copilot in Teams

- Try this prompt in your next meeting

List the biggest concern for each participant in the meeting.

Are there any unresolved items or any outstanding open items that need addressing?

Suggest follow-up questions



To Sum Things Up



- Try this prompt in your next meeting

Summarize key takeaways, decisions, and action items from today's meeting, identify unresolved topics, and draft a proposed agenda for our next session—then prepare a follow-up message I can send to the team

.

New Feature (forthcoming! Not yet in GCC)

Facilitator

Facilitator is a Teams agent that will automatically generate notes, manage meeting time with updates, summarize meeting decisions, create tasks, and much more. Use Facilitator in the meeting chat to ask meeting questions or external questions that require the Internet. Start Facilitator when you enter your meeting, or schedule it to start automatically when scheduling a meeting. When you call ends, let Facilitator wrap everything up into a neat Loop component for easy access for all meeting participants.

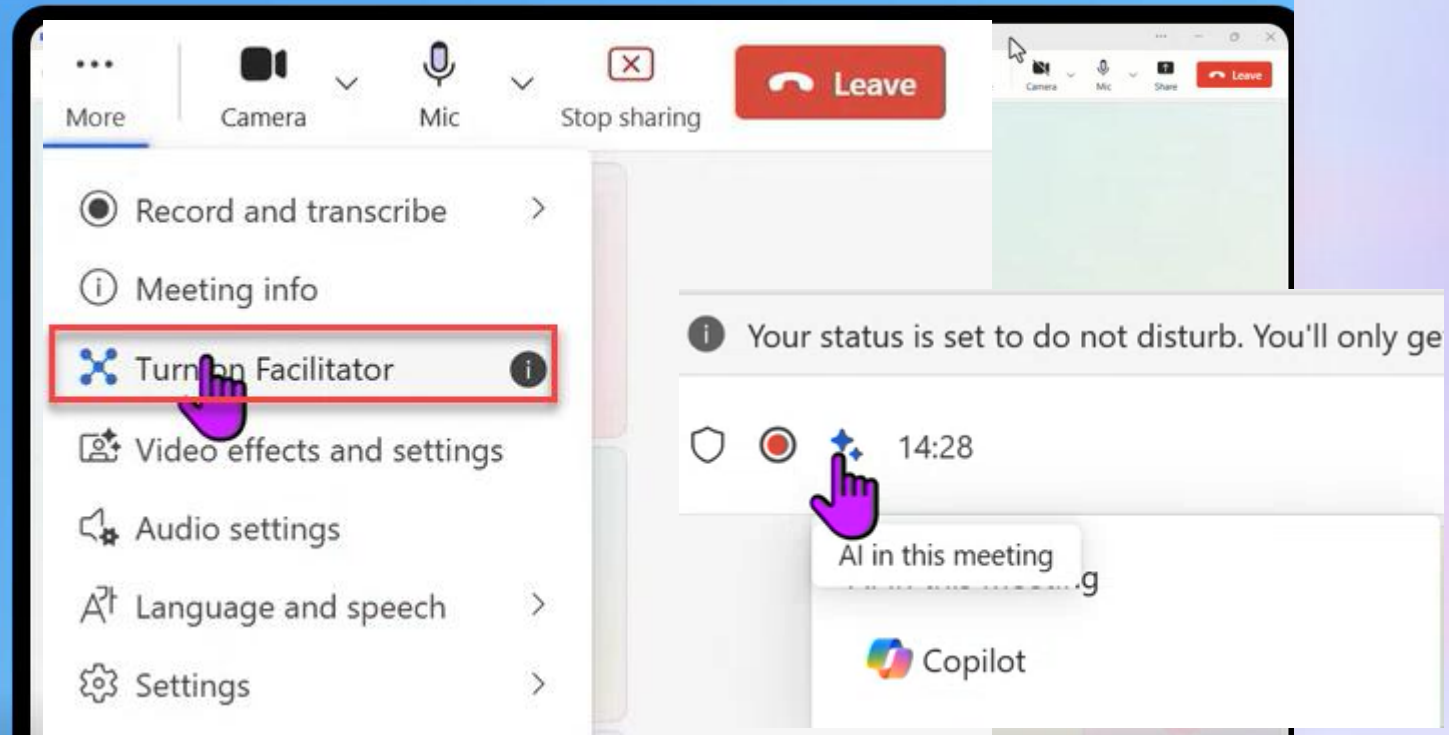
Start Facilitator and notes

Step 1: Select More actions

Step 2: Select Turn on Facilitator

A: Facilitator will automatically start taking notes

B: Facilitator will automatically track tasks



Tips & Tricks



Use Copilot during meetings:

Don't wait until after

Summarize the discussion so far

Getting real-time info

Highlight a pending question no one answered yet

What decisions were made in this chat?

• Use tables and lists:

Ask for a table (options, pros/cons) as mentioned, helps to digest complex discussions

List the questions asked during this meeting & the person that asked the question & who responded.

List any open items that have not been addressed in this meeting. Output in table format.

Prompt Gallery inspiration

Copilot Chat (both M365 + CP Chat) includes a Prompt Gallery



Find more Teams prompts to try in [Copilot Lab](#)

☰ Find action items

Are there any action items for me?



🔄 Compare Ideas

For each idea discussed, identify the pros and cons formatted as a table with 3 headers: idea, pros, cons.



🔗 What are the options?

Create a table of the options discussed with pros and cons



☰ List ideas

List 5 ideas discussed



☰ Get the schedule

List the key dates in a table



☰ Get clarity

List the different opinions and suggest clarifying questions to ask for each



🎯 What decisions were made

Did the team achieve consensus on a decision and what was it?



📋 Be prepared

What are the goals and topics from the meeting? Format each section with a bolded heading, and bolded names



☑ Keep meetings moving

What questions can the group ask to generate more ideas or insights? Limit each to 30-60 characters



🗒 Summarize meetings

Summarize what was discussed about



Additional Resources



- [Top 10 things to try first with M365 Copilot: Downloadable Kit](#)
- For more prompts, Copilot Lab at <https://aka.ms/CopilotLab>
- <http://aka.ms/GreatCopilotJourney>
- [What's New in Copilot \(non-GCC\)](#)
- [GCC Feature Availability](#)
- [GCC Roadmap Copilot for Teams](#)
- [Frequently asked questions about Microsoft 365 Copilot in Teams](#)

Questions



Thank you!

Please fill out the survey
<https://aka.ms/NCDIT>

NC DIT Innovation Summit Follow-Up

