Microsoft 365 Copilot in practice

10 work cards for turning information into action

The work cards show how Microsoft 365 Copilot can create, analyse and summarise content. Work IQ helps Copilot find relevant work data in Microsoft 365 that you are authorised to access, including email, meetings, Teams messages and files in OneDrive or SharePoint. Files stored only on Södertörn University H: or G: drives cannot be found. The material must be available in Microsoft 365.

A Microsoft 365 Copilot licence is required for these features.

1 **Outlook**
Manage email more efficiently with Copilot

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Capture what matters and turn meetings into action

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Enter the meeting with the right context

9 **Track work over time**
See progress, decisions and open activities

10 **Get an overview of your work**
Bring together tasks, meetings and priorities

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Outlook

Manage email more efficiently with Copilot

Get an overview, draft replies and turn information into clear next steps.

LICENCE REQUIREMENT:

A Microsoft 365 Copilot licence is required to use the features in this work card.

HANDLE INFORMATION CAREFULLY

Do not enter personal data, sensitive personal data, confidential information or material that you are not authorised to share.

HOW TO

1. Select an email, thread or inbox.
2. Describe what you need help with.
3. Add relevant context.
4. Review before using the result.

COMMON TASKS AND EXAMPLES

Use the examples as a starting point and adapt them to your situation.

Catch up after an absence

Get a quick overview and see what needs your attention.

- Summarise the most important emails from the past week.
- Identify emails that require action from me.
- Which questions remain unanswered?

Understand a long email thread

Summarise the discussion and highlight what matters.

- Summarise the thread briefly.
- List decisions that have been made.
- Identify open questions and next steps.

Draft a reply

Create a first draft that you review and adapt.

- Write a professional reply based on the thread.
- Summarise my message in three points.
- Adapt the tone to the recipient.

Turn email into tasks

Find activities and next steps in the content.

- Identify all tasks in the email thread.
- Create a checklist of next steps.
- Suggest a priority order.

WORK IQ IN PRACTICE

Use work data that you are authorised to access to find the right information and context.

FIND INFORMATION

• What has happened in the project since last week?

FIND CONTEXT

• Which meetings and documents are relevant?

FIND PEOPLE

• Who is involved in the matter?

IMPORTANT: FILE LOCATION

Work IQ can find authorised work data in Microsoft 365. Files stored only on H: or G: drives cannot be found. The material must be available in Microsoft 365.

TRY THIS

1. Summarise the thread.
2. Identify decisions and actions.
3. Find relevant information with Work IQ.
4. Draft a reply.
5. Review before sending.

LESS EFFECTIVE Read the entire thread manually before creating an overview.

BETTER Let Copilot summarise first. Then investigate and check the sources.

REMEMBER **Copilot helps you understand and draft information, but you are responsible for what is sent.**

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Teams and meetings

Capture what matters and turn meetings into action

Summarise discussions, find decisions and follow up work afterwards.

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HANDLE INFORMATION CAREFULLY

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HOW TO

1. Open the meeting, chat or channel.
2. Describe what you want to extract.
3. Add a purpose or perspective.
4. Review and complete the result.

COMMON TASKS AND EXAMPLES

Use the examples as a starting point and adapt them to your situation.

Summarise the meeting

Get a quick overview of the content.

- Summarise the meeting briefly.
- Highlight the most important decisions.
- Identify open questions.

Find decisions and actions

Extract concrete outcomes from the meeting.

- List decisions that were made.
- Show which actions were mentioned.
- State responsibility and timeframe if available.

Capture the discussion

Understand perspectives and positions.

- Summarise the main viewpoints.
- Highlight arguments for and against.
- Identify possible conflicts of objectives.

Follow up afterwards

Turn the content into next steps.

- Create a follow-up list.
- Suggest a follow-up email.
- Summarise for the meeting participants.

WORK IQ IN PRACTICE

Use work data that you are authorised to access to find the right information and context.

FIND INFORMATION

• What was decided in earlier meetings?

FIND CONTEXT

• Which documents relate to the discussion?

FIND PEOPLE

• Who is most involved?

IMPORTANT: FILE LOCATION

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TRY THIS

1. Summarise the meeting.
2. Identify decisions and actions.
3. Retrieve relevant earlier information.
4. Create follow-up.
5. Review and share.

LESS EFFECTIVE Rely only on memory or your own notes.

BETTER Let Copilot structure the meeting and check the result against the sources.

REMEMBER **Copilot can summarise and structure, but you are responsible for interpretation and follow-up.**

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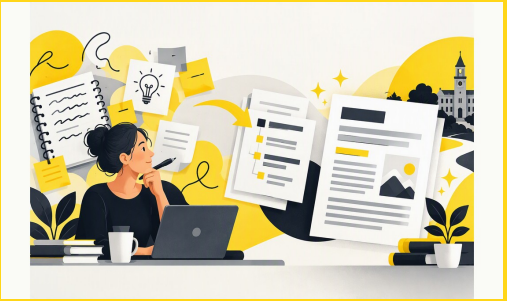
Word

From idea to finished document

Create, improve, summarise and adapt documents with relevant work context.



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HANDLE INFORMATION CAREFULLY

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HOW TO

1. Open a document or describe what you want to create.
2. State the purpose, audience and source material.
3. Refine with feedback.
4. Check facts and wording.

COMMON TASKS AND EXAMPLES

Use the examples as a starting point and adapt them to your situation.

Create a first draft

Get started with a clear structure.

- Draft a text about [topic].
- Suggest an outline with headings.
- Write for [audience] in a neutral tone.

Improve and rewrite

Make the text clearer and more useful.

- Make the text shorter and more direct.
- Adapt it for [audience].
- Suggest clearer wording.

Summarise content

Create a short, clear summary.

- Summarise in three main points.
- Highlight conclusions and recommendations.
- Write a short email version.

Adapt for different purposes

Create versions for different channels.

- Adapt the text for a web page.
- Create a short newsletter version.
- Write a formal version for decision-makers.

WORK IQ IN PRACTICE

Use work data that you are authorised to access to find the right information and context.

FIND INFORMATION

• Which documents exist on the subject?

FIND CONTEXT

• What has been discussed in meetings?

FIND PEOPLE

• Which earlier decisions affect the text?

IMPORTANT: FILE LOCATION

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TRY THIS

1. Describe the purpose and audience.
2. Ask for an outline or draft.
3. Refine headings and language.
4. Use relevant work data.
5. Review the final version.

LESS EFFECTIVE Ask for a finished document without a purpose or audience.

BETTER Give clear instructions and use relevant source material.

REMEMBER **Copilot helps you create text, but you are responsible for fact-checking and suitability.**

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PowerPoint

From source material to a clear presentation

Create a story, structure the message and adapt the presentation to the audience.

LICENCE REQUIREMENT:

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HANDLE INFORMATION CAREFULLY

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HOW TO

1. Describe the purpose of the presentation.
2. Add relevant source material.
3. State the audience, tone and length.
4. Review content, structure and sources.

COMMON TASKS AND EXAMPLES

Use the examples as a starting point and adapt them to your situation.

Create from a document

Turn existing source material into a presentation.

- Create a presentation from [document].
- Suggest a 5-7 slide outline.
- Use plain and clear language.

Develop an idea

Structure and visualise your thoughts.

- Give me an outline about [topic].
- Suggest images, charts and examples.
- Write a clear main message.

Adapt for the audience

Make the content relevant to recipients.

- Adapt for [audience].
- Make the content more concrete.
- Suggest an engaging introduction.

Improve the presentation

Clarify the structure and story.

- Review structure and content.
- Make the text more concise.
- Suggest a clearer narrative thread.

WORK IQ IN PRACTICE

Use work data that you are authorised to access to find the right information and context.

FIND INFORMATION

• Which documents are most relevant?

FIND CONTEXT

• Which earlier decisions should be included?

FIND PEOPLE

• Who can contribute source material?

IMPORTANT: FILE LOCATION

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TRY THIS

1. Choose the right source material.
2. Create an outline.
3. Ask for image and chart suggestions.
4. Adapt to the audience.
5. Review facts and message.

LESS EFFECTIVE Create the whole presentation in one step without review.

BETTER Work step by step and check that the message suits the audience.

REMEMBER **Copilot helps you create presentations, but you are responsible for content and use.**

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Excel

Analyse, understand and gain insights

Explore data, identify patterns and explain results with Copilot.

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HANDLE INFORMATION CAREFULLY

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HOW TO

1. Open the workbook.
2. Describe what you want to understand.
3. State the goal and time period.
4. Check the analysis against the data.

COMMON TASKS AND EXAMPLES

Use the examples as a starting point and adapt them to your situation.

Analyse data

Gain insights into patterns and trends.

- What does the trend over time show?
- What are the main insights?
- Are there unexpected outliers?

Understand formulas

Get help writing and explaining formulas.

- Explain this formula.
- Create a formula for [goal].
- Why am I getting this error?

Create visualisations

Get chart suggestions and interpretation.

- Which chart is most suitable?
- Create a chart for [purpose].
- Give a brief interpretation of the chart.

Summarise data

Make the result easier to use.

- Summarise the main results.
- Create a short report.
- Organise the data for analysis.

WORK IQ IN PRACTICE

Use work data that you are authorised to access to find the right information and context.

FIND INFORMATION

• Which figures are discussed in meetings?

FIND CONTEXT

• Which decisions affect the data?

FIND PEOPLE

• Who has worked on the file?

IMPORTANT: FILE LOCATION

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TRY THIS

1. Analyse and find insights.
2. Choose a suitable visualisation.
3. Interpret the result.
4. Ask follow-up questions.
5. Validate against the sources.

LESS EFFECTIVE Analyse everything manually and risk missing patterns.

BETTER Let Copilot help, but check results and assumptions.

REMEMBER **Copilot can analyse data, but you are responsible for quality and decisions.**

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Find the right information

Search your work data with Work IQ

Bring together relevant answers from emails, documents, meetings and chats you can access.

LICENCE REQUIREMENT:

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HANDLE INFORMATION CAREFULLY

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HOW TO

1. Describe the question or information need.
2. State the project, topic or timeframe.
3. Ask for sources and uncertainties.
4. Open and check the originals.

COMMON TASKS AND EXAMPLES

Use the examples as a starting point and adapt them to your situation.

Get a current picture

See what has happened in a matter.

- Summarise recent developments.
- Which decisions have been made?
- Which questions are open?

Find the right sources

Locate relevant work material.

- Which documents are relevant?
- Which meetings should I review?
- Which email threads contain decisions?

Compare information

See differences and connections.

- Compare the two latest versions.
- What has changed since the last meeting?
- Is there conflicting information?

Prepare next steps

Make the information actionable.

- What needs to be followed up?
- Which source material is missing?
- Suggest a checklist.

WORK IQ IN PRACTICE

Use work data that you are authorised to access to find the right information and context.

FIND INFORMATION

• What has happened in this area?

FIND CONTEXT

• Which sources support the answer?

FIND PEOPLE

• Who is involved?

IMPORTANT: FILE LOCATION

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TRY THIS

1. Formulate the information need.
2. Limit the topic and timeframe.
3. Ask for a sourced summary.
4. Open the originals.
5. Use the result in the next task.

LESS EFFECTIVE Accept an answer without checking the sources.

BETTER Use source references and check the original material.

REMEMBER **Work IQ follows your existing permissions. You are responsible for how the answer is used.**

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Find the right people

Identify expertise and opportunities for collaboration

Use work data to find people involved in a topic or project.

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HANDLE INFORMATION CAREFULLY

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HOW TO

1. Describe the area in which you need help.
2. State the project or context.
3. Ask for evidence of the connection.
4. Check directly with the person.

COMMON TASKS AND EXAMPLES

Use the examples as a starting point and adapt them to your situation.

Find people involved

See who works on the matter.

- Which people are mentioned in the material?
- Who attended relevant meetings?
- Who has worked on the documents?

Find expertise

Identify possible subject knowledge.

- Who works with [area]?
- Who has contributed to similar matters?
- Which sources show the connection?

Understand collaboration

See how the work is connected.

- Which teams are involved?
- Who collaborates on the matter?
- What dependencies exist?

Prepare contact

Create a good starting point.

- Summarise why I am contacting the person.
- Suggest relevant questions.
- Draft a short contact email.

WORK IQ IN PRACTICE

Use work data that you are authorised to access to find the right information and context.

FIND INFORMATION

• Which people are involved?

FIND CONTEXT

• Which sources show their connection?

FIND PEOPLE

• Who should I contact first?

IMPORTANT: FILE LOCATION

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TRY THIS

1. Describe the expertise needed.
2. Ask for relevant people.
3. Check the sources.
4. Prepare questions.
5. Make contact and verify.

LESS EFFECTIVE Assume someone is an expert just because their name appears.

BETTER Use the connections as guidance and verify with the person.

REMEMBER **Copilot can find connections in work data, but people determine responsibility and expertise.**

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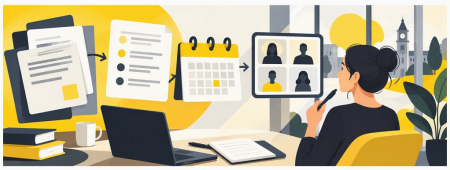
Prepare for meetings

Enter the meeting with the right context

Gather earlier discussions, source material, decisions and open questions before the meeting.



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HANDLE INFORMATION CAREFULLY

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HOW TO

1. Open the meeting in Outlook or Teams.
2. Describe what you want to prepare.
3. State the purpose and participants.
4. Review and complete the material.

COMMON TASKS AND EXAMPLES

Use the examples as a starting point and adapt them to your situation.

Summarise earlier meetings

Get an overview of the history.

- Summarise earlier meetings.
- Highlight decisions and next steps.
- Which questions are still open?

Prepare source material

Gather relevant information.

- Bring together emails and documents.
- Suggest an agenda.
- Which materials should I read?

Get participant context

Understand who is affected.

- Which people are involved?
- Which perspectives may be important?
- What have participants contributed?

Prepare follow-up

Plan the work after the meeting.

- Create a decision list.
- Suggest follow-up points.
- Draft a follow-up email.

WORK IQ IN PRACTICE

Use work data that you are authorised to access to find the right information and context.

FIND INFORMATION

• What has happened since the last meeting?

FIND CONTEXT

• Which documents do I need to read?

FIND PEOPLE

• Who should receive questions?

IMPORTANT: FILE LOCATION

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TRY THIS

1. Summarise earlier meetings.
2. Identify open questions.
3. Gather relevant material.
4. Create an agenda.
5. Prepare follow-up.

LESS EFFECTIVE Enter the meeting without earlier context.

BETTER Let Copilot provide a quick current picture and check the key sources.

REMEMBER **Copilot can help you prepare, but you are responsible for interpretations and questions.**

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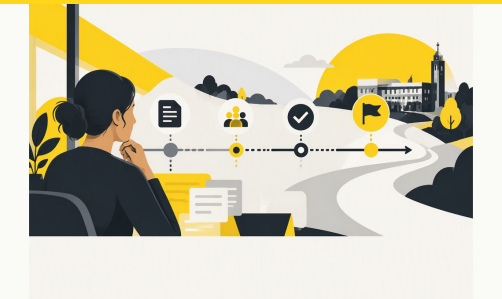
Track work over time

See progress, decisions and open activities

Use Work IQ to follow a project or matter through meetings, documents, emails and chats.



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HANDLE INFORMATION CAREFULLY

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HOW TO

1. State the project or matter.
2. Choose a timeframe.
3. Ask for events, decisions and open questions.
4. Check important details.

COMMON TASKS AND EXAMPLES

Use the examples as a starting point and adapt them to your situation.

Create a timeline

See key events in order.

- Which milestones have been reached?
- When were key decisions made?
- What has changed over time?

Track decisions

See consequences and status.

- Which decisions have been made?
- What has been implemented?
- Which decisions need follow-up?

Track activities

Find open commitments.

- Which activities remain open?
- Which deadlines are mentioned?
- What dependencies exist?

Capture risks

See obstacles and uncertainties.

- Which risks have been raised?
- What lacks an owner or plan?
- Which questions recur?

WORK IQ IN PRACTICE

Use work data that you are authorised to access to find the right information and context.

FIND INFORMATION

• Which sources describe the progress?

FIND CONTEXT

• Which people are affected?

FIND PEOPLE

• Which questions lack answers?

IMPORTANT: FILE LOCATION

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TRY THIS

1. State the project and timeframe.
2. Create a timeline.
3. Identify decisions and activities.
4. Capture risks.
5. Check status with those responsible.

LESS EFFECTIVE Treat Copilot's summary as the official project status.

BETTER Use the overview as support and verify status with sources and owners.

REMEMBER **Copilot can show progress, but responsible people establish status and priorities.**

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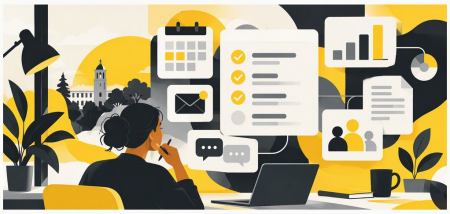
Get an overview of your work

Bring together tasks, meetings and priorities

Use Microsoft 365 Copilot to see what needs your attention.



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HANDLE INFORMATION CAREFULLY

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HOW TO

1. Describe the period you want to review.
2. State projects or work areas.
3. Ask for commitments, meetings and open questions.
4. Set priorities yourself based on responsibility and situation.

COMMON TASKS AND EXAMPLES

Use the examples as a starting point and adapt them to your situation.

Review commitments

Find things you have agreed to do.

- Which actions have I committed to?
- Which deadlines are mentioned?
- What lacks follow-up?

Prepare the week

Get a single starting point.

- Which meetings require preparation?
- Which documents should I read?
- Which matters need a reply?

See the project picture

Compare areas and workload.

- Which projects are most active?
- Which questions recur?
- Where are the dependencies?

Choose a focus

Create a considered priority order.

- What is most urgent?
- What matters most for my goals?
- Which tasks can be coordinated?

WORK IQ IN PRACTICE

Use work data that you are authorised to access to find the right information and context.

FIND INFORMATION

• Which work data supports this?

FIND CONTEXT

• Which people and projects are affected?

FIND PEOPLE

• Which details need verification?

IMPORTANT: FILE LOCATION

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TRY THIS

1. Choose a period.
2. Gather commitments and meetings.
3. Identify open questions.
4. Sort by goals and responsibility.
5. Set your own priorities.

LESS EFFECTIVE Let Copilot decide on its own what matters most.

BETTER Let Copilot structure the material, then make your own prioritisation.

REMEMBER **Copilot provides an overview. You are responsible for priorities, decisions and communication.**

Back to overview

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