Sun City Summerlin Computer Club Seminar

Microsoft’s Copilot In Office 365

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Where to Find the Materials

- **Sun City Summer Computer Club Website:**
  - https://www.scscc.club/smnr

- **Direct Hyperlink**
  - https://www.scscc.club/smnr/MSCopilotinOffice365.pdf

Seminar Agenda

- Overview of Microsoft [Office] 365
- Overview of Microsoft Copilot
- Cost Considerations (AI Tokens)
- Word Examples
- Excel Examples
- PowerPoint Example
- Copilot Settings
- Limitations of AI Chatbots

Overview of Microsoft [Office] 365

- **Microsoft 365 is the subscription version of MS Office**
  - **Now includes integrated MS Copilot**
  - **Personal Edition (1 user, 1 TB of cloud storage, 5 devices)** **$ 9.99 / mo; $ 99.99 / yr**
  - **Family Edition (6 users, 6 TB of cloud storage, 5 devices each)** **$12.99 / mo; $129.99 / yr**

- **Allows user to install the latest version equivalent to Office Professional:**
  - **Word**
  - **Excel**
  - **PowerPoint**
  - **Outlook (classic)**
  - **OneNote**
  - **Access**
  - **Forms**
  - **OneDrive**
  - **Defender**
  - **Designer**
  - **ClipChamp**
  - **Teams**
  - **Editor**

Overview of Microsoft Copilot

- **MS Copilot is a "Generative AI" chat-bot that interested users can access.**
  - **Microsoft Copilot is incorporated into Windows 10/11, the Microsoft Edge web browser and the Office 365 Suite.**
  - **There's also a stand-alone Copilot website (Copilot Chat)**
  - **Copilot is based on Open AI's ChatGPT 4 large language model.**
  - **If you have a microphone and speakers, Copilot can read answers to you and accept spoken input.**
  - **https://learn.microsoft.com/en-us/copilot/tutorials/learn-microsoft-copilot**

- **Copilot has been trained by reviewing and digesting billions of web documents.**
  - **The chatbots' "knowledge bases" and answers have been curated by large teams of humans. Because they have been trained on the public Internet, it has digested a lot of misinformation.**
  - **Chatbots generate answers by predictively merging words and phrases that fit the context of the question asked.**
  - **BEWARE of "hallucinations" – answers that *sound* correct but are factually *wrong*.**

- **Today's demo tour will focus on MS Copilot as integrated into Office 365**

Cost Considerations (AI Tokens)

- **Your Microsoft 365 subscription includes 60 free AI Tokens Each Month.**
  - **Unused tokens do not carry over to the next month – "Use'm or lose'm".**
  - **If you need more than 60 tokens, upgrade your Microsoft 365 Account to Copilot Pro.**
- **Each AI prompt uses up one token.**
  - **Works out to about two AI prompts per day. Not much if you're a busy user.**
- **MS hopes to turn this into a major profit center.**
  - **AI is very expensive to deliver using current technology / methodology.**
  - **Requires massive server farms, lots of power.**
  - **Expect the cost per token to rise over time as models get bigger and more capable.**
  - **"Next big thing" is AI "agents" that perform actions on your behalf.**
- **Disabling / Removing Copilot from Office 365**
  - **https://www.zdnet.com/article/how-to-remove-copilot-from-your-microsoft-365-plan/**

Word Example: Create an Essay

- **Prompt:** ***Write a 500-word biography of Leonardo DaVinci***
- **Response (First two paragraphs)**

Biography of Leonardo DaVinci

The Quintessential Renaissance Man

Leonardo da Vinci, born on April 15, 1452, in the small town of Vinci in Tuscany, Italy, is widely considered one of the most diversely talented individuals ever to have lived. Embodying the spirit of the Renaissance, his contributions spanned across art, science, engineering, anatomy, and architecture, leaving an indelible mark on each field.

Early Life and Training

Leonardo was the illegitimate son of Ser Piero da Vinci, a notary, and a peasant woman named Caterina. Despite his humble beginnings, Leonardo's father recognized his potential and ensured he received a comprehensive education. At the age of 14, Leonardo began his apprenticeship with Andrea del Verrocchio, a prominent Florentine painter and sculptor. It was here that he honed his skills in various disciplines, including metalworking, drawing, painting, and sculpture.

MS Copilot in Office 365

Word Example: Healthcare Power of Attorney

Prompt: ***Write a Nevada Healthcare Power of Attorney for a senior appointing his son as agent. Include advanced directives.***

Response (*Advanced Directive Not Shown*):

Nevada Healthcare Power of Attorney

1. Designation of Healthcare Agent

I, [Senior's Full Name], residing at [Senior's Address], hereby appoint my son, [Son's Full Name], residing at [Son's Address], as my healthcare agent (hereinafter referred to as "Agent") to make healthcare decisions on my behalf if I am unable to do so.

2. Agent's Authority

My Agent shall have the authority to make any and all healthcare decisions for me, including but not limited to:

- **Consenting to or refusing medical treatment.**
- **Accessing my medical records.**
- **Admitting or discharging me from any hospital, nursing home, or other medical facility.**
- **Making decisions regarding life-sustaining treatment, including artificial nutrition and hydration.**

5. Duration

This Healthcare Power of Attorney shall become effective immediately and shall remain in effect until my death or until I revoke it in writing.

6. Revocation

I reserve the right to revoke this Healthcare Power of Attorney at any time by providing written notice to my Agent and my healthcare providers.

7. Signature and Witnesses

MS Copilot in Office 365

Word Example: Rewrite a Section of a Document

- **Prompt:** ***Rewrite the following. <paste in a block of text>***
- **Response: Copilot's rewrite …**
- **Let's look at my original and Copilot's rewrite side-by-side**

Tom's Original …

Why You Might Want to Lease a New Car

With a lease you are always driving a relatively new car that is under warranty and has new tires, brakes, battery, wiper blades and other consumables. There's little likelihood that the car will break down during the three years / 36000 miles of the lease.

With a lease, you are driving a new car with the latest in technology and safety features

At the end of the lease, you can turn in the car, lease a new one and continue for another 3 years. If the turn-in has low mileage and is in good condition (likely for most seniors), you may be able to get a trade-in allowance toward the new lease. Alternatively, you can turn in the car and walk away. Or … especially if the car has very low mileage, you might decide to buy the car, paying the residual.

Often, the monthly payment on a lease is lower than the payment on a financed purchase. This is because you're not buying the entire usable operating life of the car – only the first 3 years / 36,000 miles worth.So,

when you turn it in it has a lot of remaining value.

Copilot's Rewrite

Why You Might Want to Lease a New Car

Leasing a car offers several advantages. Firstly, you get to drive a relatively new vehicle that is under warranty, with new tires, brakes, battery, wiper blades, and other consumables. This reduces the likelihood of the car breaking down during the three years or 36,000 miles of the lease.

Additionally, leasing allows you to drive a car equipped with the latest technology and safety features. At the end of the lease, you have several options: you can turn in the car and lease a new one, potentially receiving a trade-in allowance if the car has low mileage and is in good condition. Alternatively, you can simply return the car and walk away, or decide to buy it by paying the residual value, especially if it has very low mileage.

Often, the monthly payment on a lease is lower than that of a financed purchase. This is because you are only paying for the first three years or 36,000 miles of the car's usable life, leaving it with significant remaining value when you turn it in.

Excel Example: Generate a Chart – Value vs Date

- **I tried to have Copilot generate a chart of daily morning blood sugar readings.**
  See my demo tracking sheet.
- **Copilot first insisted the spreadsheet had to be auto-saved on OneDrive; I allowed that.**
- **Copilot then balked, complaining that my worksheet had multiple header columns. I resolved that.**
- **Copilot kept telling me it couldn’t create the line graph for one reason or another.**
- **I tried several other edits to make the sheet and prompt compliant with Copilot’s requirements.**
- **Final Prompt:** ***Generate a line chart using the numbers in [D2:D32] against the dates in [A2:A32].***
- **Copilot was unable to generate the requested chart! Its response was:**
  I couldn't create a chart using the numbers in [D2:D32] against the dates in [A2:A32], but here's an answer that may be helpful.

Excel Example: Generate Stock Data Links

- **Prompt:** ***Modify this worksheet to retrieve the stock price into column C and compute market value (price * shares) into column D for each stock symbol in column A. Generate the formula for total market value at the bottom of column D.***
  See my stock data tracking sheet.
- **Copilot was unable to complete the task. Its response only offered a suggestion:**

  Looking at A1:B32, here's 1 formula column to review and insert in Column C: Stock Price

  Fetches the current stock price for each stock symbol by using the STOCKHISTORY function to retrieve the price as of today. If the stock price cannot be retrieved, it defaults to 0 (dollars).

  =IFERROR(STOCKHISTORY($A2,TODAY(),TODAY(),0,1),0)

- **I didn't pursue making the suggested changes; there's a more elegant solution.**
- **Next to the Demo spreadsheet, I have one where I had previously generated the required stock data links.**

PowerPoint Example: Convert a Word Document to PowerPoint Slides

- **I tried to convert a Word document on the Freegal music service to a PowerPoint slide deck.**
  - **This proved to be very tedious. The document had to be uploaded to my OneDrive cloud and then it wanted me to provide the OneDrive sharing link.**
  - **Even after I did that, PowerPoint complained it couldn't process the document.**
- ***Prompt:*** ***Create a presentation from file: https://1drv.ms/w/c/5e34a45f3cc5ba1c/ERSCjNJUHp5Hh7_4SQbG4JkBsSs_4XoghRl_JueRrClqNA?e=el4HgH***
- **Response:** ***I can transform files in your personal OneDrive only. Please upload the file to your personal OneDrive and try again with the link to the uploaded file.***
- **I tried starting in Word and asking Copilot to generate a PowerPoint presentation. Word generated a nice outline of the article's contents and suggested I use that to generate the PowerPoint presentation. Better – but not really that helpful.**
- **In PowerPoint, I finally tried the following prompt:**
  Generate a presentation about the Freegal music service.
- **PowerPoint produced a quite nice, colorful presentation. Let's look at it.**
  - **It wasn't quite what I was looking for; I wanted more of a "how to use it" tutorial. But – not bad!**

Copilot Enable/Disable in Office 365

- https://support.microsoft.com/en-us/office/how-to-turn-off-copilot-in-microsoft-365-family-and-personal-subscriptions-bc7e530b-152d-4123-8e78-edc06f8b85f1#bkmk_windows_checkbox

- **Word Enable / Disable Copilot**
  - Go to File > Options > Copilot.
  - Check or uncheck the “Enable Copilot” checkbox. Click the OK button.
  - The Copilot icon in the ribbon will be enabled (colorful) or disabled (grey).
- **Excel Enable / Disable Copilot**
  - Go to File > Options > Copilot.
  - Check or uncheck the “Enable Copilot” checkbox. Click the OK button.
  - The Copilot icon in the ribbon will be enabled (colorful) or disabled (grey).
- **PowerPoint Enable / Disable Copilot**
  - Go to File > Options > Copilot.
  - Check or uncheck the “Enable Copilot” checkbox. Click the OK button.
  - The Copilot icon in the ribbon will be enabled (colorful) or disabled (grey).
- **Copilot is not offered yet in Outlook 365 Personal or Family**

Limitations of AI Chatbots

- **They're "trained" by scanning billions of pages of web content.**
  - Content may have various biases.
  - Content may be inaccurate.
  - Requires large numbers of human reviewers (with their own biases) to verify answers.
  - Be very careful using responses for medical, legal, military or law enforcement decisions / actions.
- **Responses are sensitive to how questions/prompts are expressed.**
  - The art is in deciding how specific or general to be.
  - Chatbots currently don't know much about people not publicly known.
- **Caution about asking questions in which proprietary information is included.**
  - Chatbot's "learn" from the questions posed and from ratings given to the answers.
- **Because chatbots answers are digested from material the bots have scanned, the answers may infringe on copyrighted / patented intellectual property.**
  - Be careful using the output of a chatbot without verifying whether that material is protected.

Final Q and A

Final Questions and Answers