

use_case_id	parent_entry_id	title	description	business_area	type_of_data	hitl_approach	notes/instructions
COPILOT_001	AIREG-001	Meeting custom summary	Using Copilot to generate custom-formatted summaries of recorded Teams meetings. Users record the meeting with transcription enabled, then apply a pre-built or user-defined template to produce structured recaps (e.g. executive reports, action item lists, speaker breakdowns).	Org-wide	Meeting recordings, transcripts, meeting chat content	Review prior to use	Creating meeting custom summaries
COPILOT_002	AIREG-001	AI-Assisted Document Review and Editing Using Focused Agents	A two-phase workflow for reviewing and improving draft Word documents using custom Copilot agents and Edit Mode. In phase one, a focused agent is selected via @referencing in Chat only mode and asked to review the open document against a defined set of criteria (e.g. style guide compliance, use of persuasive techniques). The agent returns specific, structured recommendations. In phase two, the user switches to Edit Mode and instructs Copilot to apply the recommended changes directly to the document. Track Changes is enabled throughout to allow selective review and acceptance of each edit.	Org-wide	Draft Word documents; may include internal working papers, board papers, consultation documents, comment letters, or other formal written outputs	Review prior to use - Two explicit human review points: (1) user reads and evaluates agent recommendations before any edits are initiated; (2) Track Changes is enabled during Edit Mode so each change can be individually accepted or rejected. User retains full control and final editorial authority throughout.	Using Edit mode and Agents to Streamline Draft Review
COPILOT_003	AIREG-001	Targeted Document Analysis Using the Researcher Agent	Using the Copilot Researcher agent to analyse a defined set of SharePoint files and extract key themes, patterns, or chronological timelines. The user scopes the agent to specific SharePoint sites or folders via the Sources panel (turning off Web, Emails, Meetings, and Power BI; turning on Work and SharePoint; and adding specific sites or folders). The user then prompts the agent with a clear research objective and structured output format — for example, a timeline of project discussions across a year, or a structured report of stakeholder submissions broken down by consultation question. Researcher cites the source documents it used, and outputs are reviewed and refined before use. Adding SharePoint metadata to source files improves search accuracy.	Technical Teams	SharePoint-hosted documents including meeting papers, submissions, discussion papers, comment letters, board papers, and project working papers	User explicitly configures which SharePoint sites and folders the agent may access before prompting; user reviews which source documents Researcher cites and assesses completeness; all agent-generated themes, summaries, timelines, and tables are treated as drafts until validated by the user; user applies judgement on accuracy, completeness, and appropriate characterisation of source material; user may iterate with follow-up prompts to fill gaps or request additional analysis	Using researcher agent on specific data
COPILOT_004	AIREG-001	Data Analysis Using the Analyst Agent or Copilot in Excel Edit Mode	A two-pathway workflow for AI-assisted analysis of structured data. Pathway A (Analyst agent): The Copilot Analyst agent is invoked in Chat and a structured data file is attached. The agent writes and executes code to answer analytical questions, surface patterns, generate frequency tables, and produce narrative summaries — returning results directly in Chat. Best used when the answer is the product and no changes to the source file are needed. Pathway B (Excel Edit Mode): Copilot is opened via the Home ribbon inside an Excel file and works directly in the spreadsheet, primarily using Excel formulas to generate formula columns, PivotTables, charts, and other persistent elements. Best used when the file is the product and outputs need to be embedded in the spreadsheet for reuse or sharing. Both pathways function the best when data is formatted as an Excel Table with descriptive column headers, and the file must be saved to OneDrive or SharePoint.	Technical Teams	Structured data files (Excel, CSV); may include survey results, pipeline outputs, aggregated reporting data, financial datasets, or climate disclosure datapoints	User defines the analytical question and scope before prompting; in Pathway A, user reviews all agent outputs in Chat and validates figures, categories, and interpretations against source data before use or sharing; in Pathway B, user reviews all cell-level changes made by Copilot before using and reversing changes if results are unexpected; user validates all formulas against known data subsets prior to finalising; outputs are treated as drafts until human-verified	Copilot Data Analysis Analyst Agent and Excel Edit Mode
COPILOT_005	AIREG-001	Focused Project Workspaces Using Copilot Notebooks	Using Copilot Notebooks to create dedicated, scoped workspaces for specific projects or topics. Each notebook contains a curated set of reference materials (Microsoft 365 files, SharePoint links, Pages, meeting notes, web links) that Copilot always considers when responding, enabling more precise and relevant responses than a general Chat session. Users create a notebook, add relevant documents, set custom instructions to guide Copilot's tone and scope, and interact with Copilot within that curated context across multiple sessions. Notebooks maintain persistent context, support team collaboration, and include an auto-generated Overview tab with an optional podcast-style audio overview.	Org-wide	Project documents, research materials, consultation documents, board papers, standards, guidance documents, meeting notes, and web pages — curated by the user per notebook	User is responsible for curating the reference materials added to the notebook and for keeping the reference set current and relevant; user sets custom instructions to appropriately scope Copilot's responses; user reviews all Copilot responses within the notebook before relying on them; user applies judgement on accuracy, relevance, and whether the notebook's reference set is sufficient for the task at hand	Focused Project Workspaces Using Copilot Notebooks