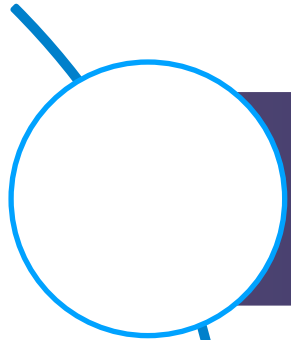


IPRO Meeting Assistant

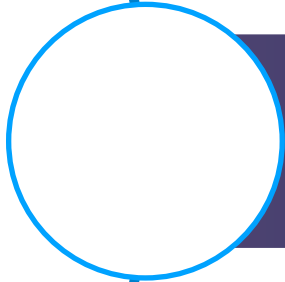
IPRO Meeting Assistant Training

12/04/2025

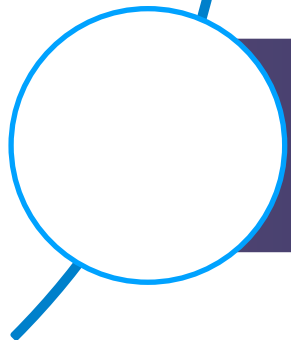
What will be covered in this training?



Part 1: Accessing and Using Co-Pilot



Part 2: Accessing and Using the IPRO Meeting Assistant



Part 3: Optional Additional Prompts

What does the IPRO Meeting Assistant do?



What it does	How this helps you
Summarizes meetings	Turns long notes or transcripts into clear, plain-language summaries you can quickly scan.
Highlights key discussion points	Pulls out the main topics and themes so you don't have to re-read everything.
Captures decisions	Lists what was decided, by whom, so you have a reliable record of outcomes
Identifies action items	Extracts follow-up tasks and, when mentioned, the owners responsible for each item
Flags open questions / parking lot items	Helps you see what still needs to be resolved in future meetings
Creates ready-to-share content	Outputs text you can copy directly into Outlook, Word, OneNote, or Teams posts
Supports minutes and recap emails	Gives you a starting draft for formal minutes, recap emails, or status updates

Part 1: Accessing Microsoft 365 Copilot

What is Microsoft 365?



Microsoft 365 Copilot is an AI-powered assistant integrated into Microsoft 365 apps like Word, Excel, PowerPoint, Outlook, and Teams.

How it works:

- Contextual AI: Understands your work context (files, emails, meetings, chats) and responds in real time. Natural Language Prompts:
- You type instructions like “Summarize emails about Project X” or “Create a 5-slide presentation from this document,” and Copilot executes them.
- Secure Integration: Works within your organization’s compliance and security boundaries using Microsoft’s trusted cloud.



What are the Key Features of Microsoft 365?



Microsoft 365 acts as a “co-pilot” for your work, helping you create, summarize, analyze, and automate tasks without leaving your workflow.

Key Features:

- Document Assistance: Draft reports, proposals, and emails, rewriting or summarizing content with tone adjustments.
- Data Analysis in Excel: Generate charts, identify trends, and create predictive models.
- Presentation Design in PowerPoint: Converts documents into slides with design suggestions.
- Meeting & Email Summaries: Summarize Teams meetings and long email threads.



Copilot in Teams
Have more effective meetings, easily catch up on chats, and find information faster.



Copilot in Outlook
Start emails quickly, generate a summary, and catch up on long emails easily.



Copilot in Word
Start a draft, add to an existing document, rewrite text, or generate a summary.



Copilot in PowerPoint
Create beautiful presentations, organize and summarize presentations, and more.



Copilot in Excel
Go deeper with data, identify insights, generate formulas, and more.



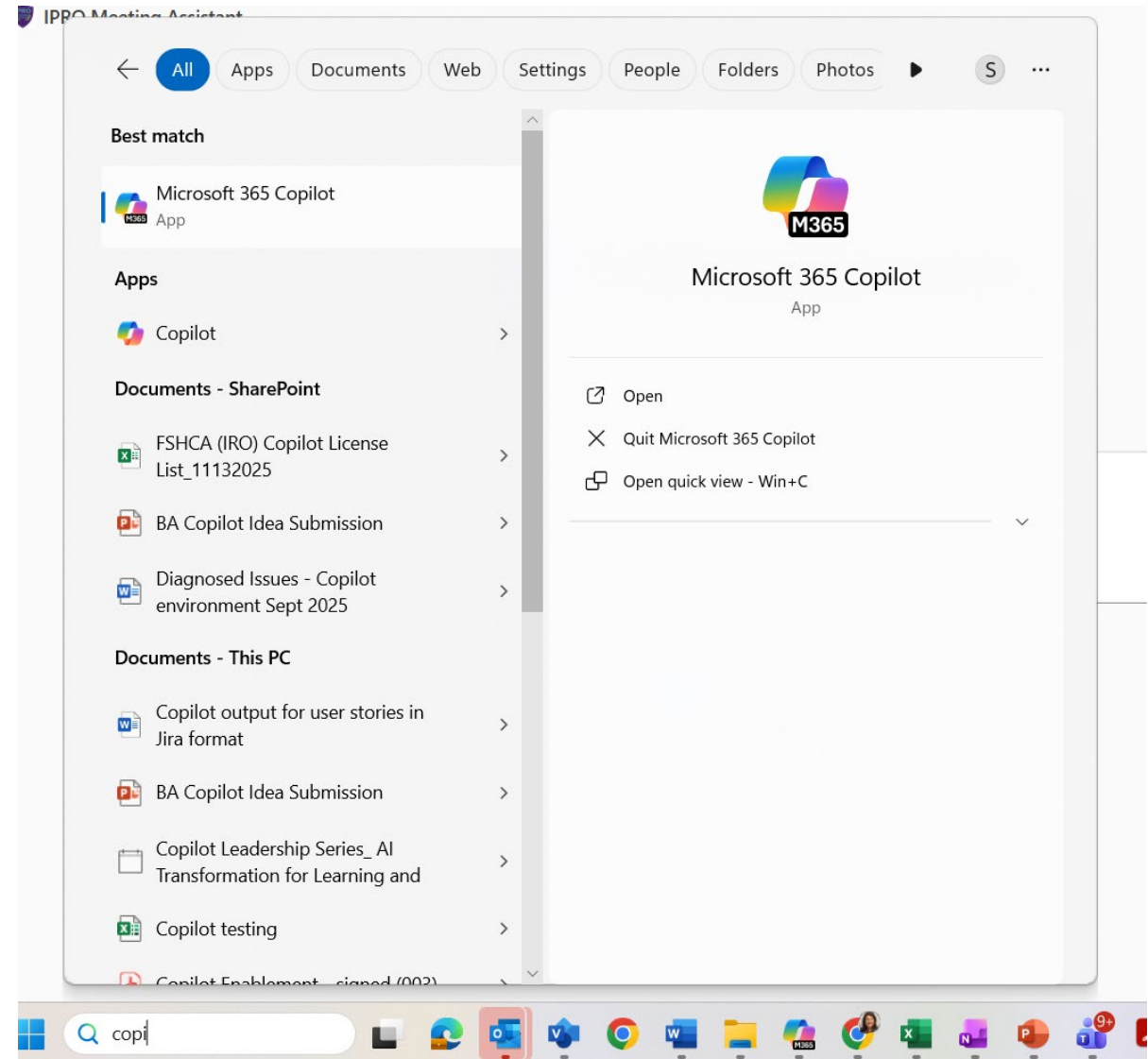
NOTE: Open the app and check the Home tab on the ribbon. You should see the Copilot icon.

Finding the Microsoft 365 Copilot Application

From your search, type in copilot. The Microsoft 365 Copilot application will return.

Right click on the application and pin it to your task bar or pin to start

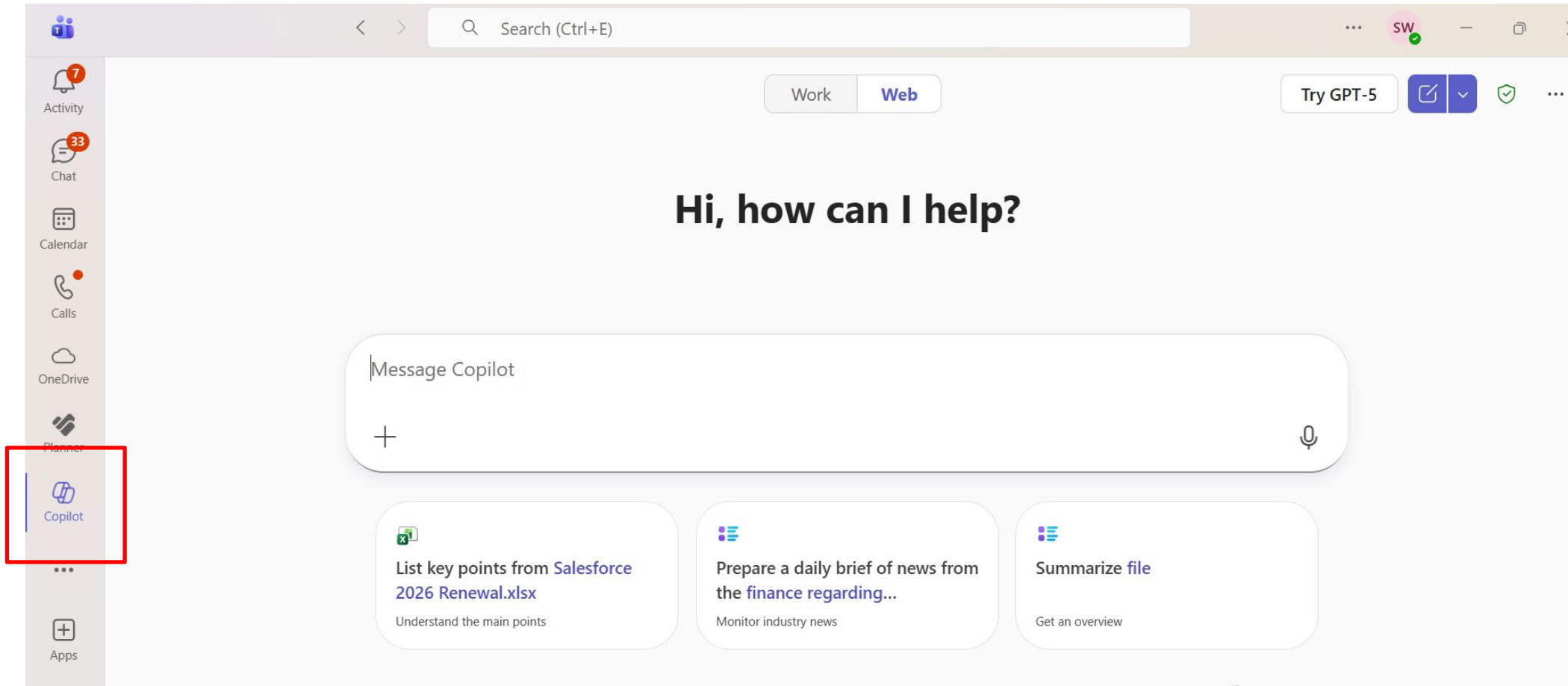
You can also drag the icon to your desktop to create a desk top shortcut



Finding Microsoft 365 Copilot in Teams



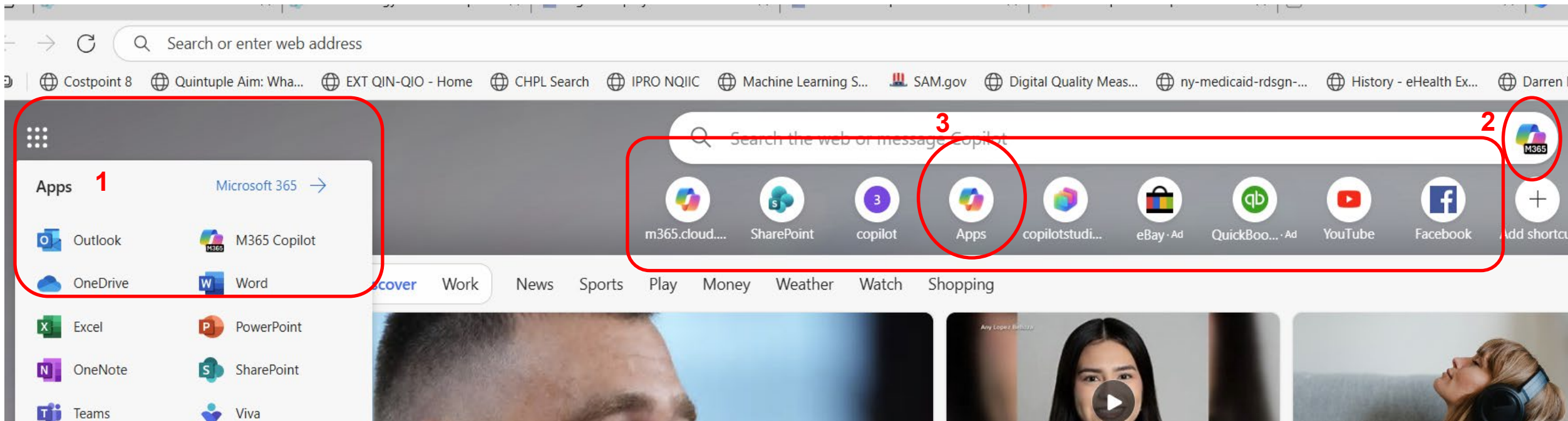
From Teams, select copilot. If you do not see copilot, click the plus sign and search for the application. Once you add it, it will be available from your quick list tool bar.



Finding Microsoft 365 in Edge

From your Edge Browser home page, you can access Copilot three ways

1. Click on the ellipsis on the top left of the page and select M365 Copilot
2. In the Search Bar at the top of the page, click on the M365 icon to the right
3. Once you frequent the M365 site, it will start to show up in your shortcuts bar



Reminder: Edge is the preferred browser when using Copilot

Part 2:

**Locating and using the IPRO
Meeting Assistant**

Locating the IPRO Meeting Assistant

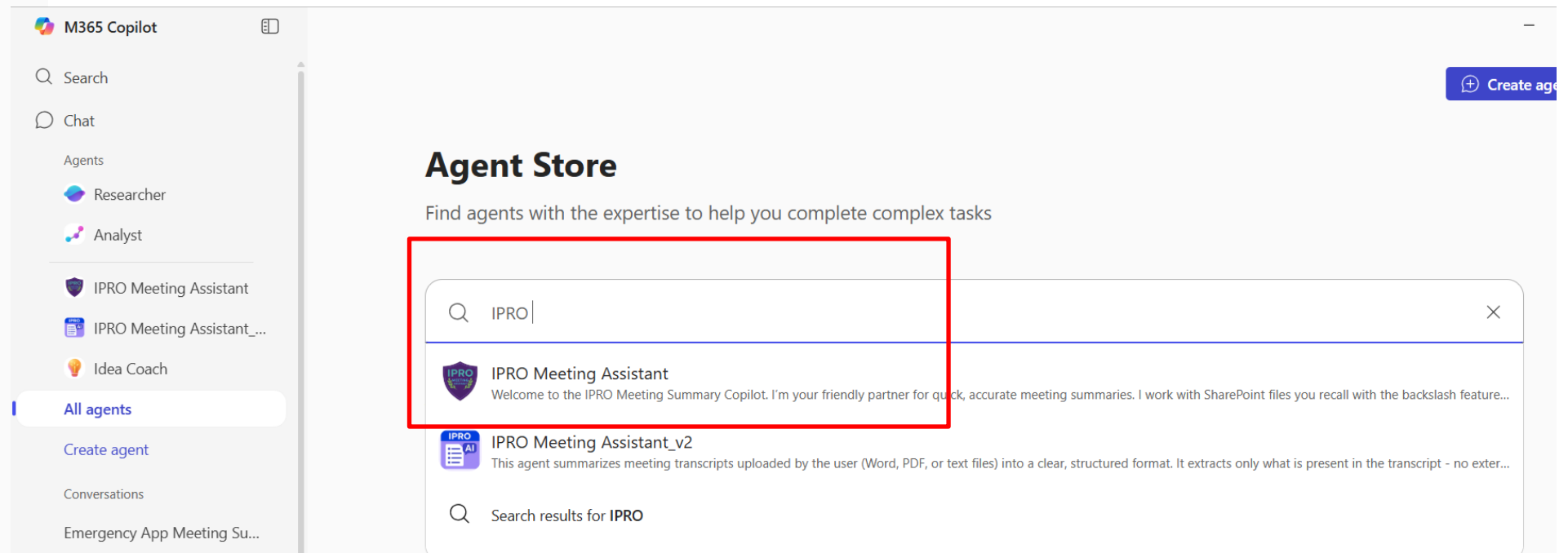
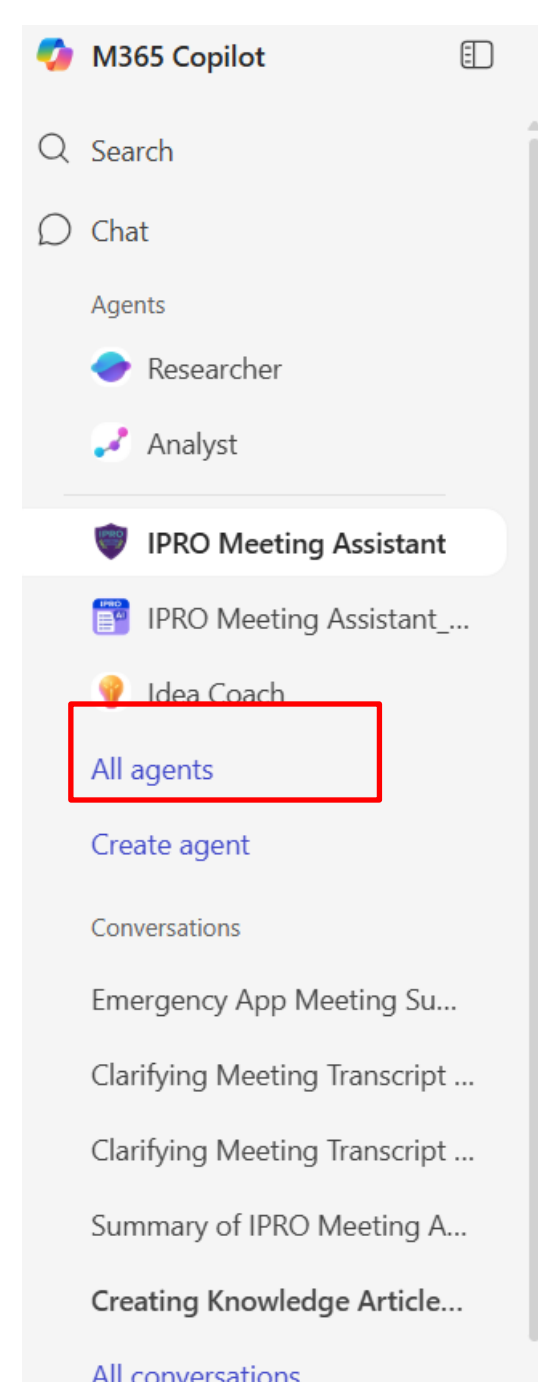


When first using the agent, click on the All Agents tab. In the search box, type IPRO Meeting Assistant

Open the Assistant and install it



Note: You can follow these same steps in any of the M365 Copilot apps you are in to add the IPRO Meeting Assistant.



Getting a Meeting Transcript



Navigate to the recorded meeting and download your meeting transcript. Save the meeting transcript in your preferred location.

A screenshot of a Microsoft Teams meeting card. The card title is "Program Review Committee" with a subtitle "Thursday, December 4, 2025 2:00 PM - 3:00 PM". It features a "View recap" button, "12 speakers" and "3 tasks" indicators, and a list of files: "Transcript" (highlighted with a red box), "Attendance", and "20250501 Program Review ...". A video recording thumbnail is shown on the right with a "30m 25s" duration and an "Expires in 120 days" warning.



You must be the owner of the meeting to download the transcript. You can ask the meeting owner to add you as a Co-Owner through teams or request they send you the download.

Using the IPRO Meeting Assistant

Navigating the Agent



Click the New conversation icon (purple pencil in the top-right) to start fresh with a new meeting. Each conversation is separate, so your prompts and content don't get mixed together.

Conversation History: Recent chats with the IPRO Meeting Assistant appear under Conversations in the left pane. You can click any previous conversation to reopen it and review or copy earlier summaries.

TIP: You can add supporting materials to the prompt window to provide the assistant with more context about the information discussed.

Prompt Window: Drag, Paste or Attach your transcript here

Starter Prompt: Use the pre-built "Summarize Meeting Transcript" starter prompt to quickly get a standard summary, decisions, and action items without having to write your own prompt from scratch.

IPRO Meeting Assistant
Created by Scott Rader

Message Copilot

Summarize Meeting Trans...
Please summarize the attached meeting transcript and any...

Meeting Summaries



The IPRO meeting assistant will return a structured meeting summary including:

- Meeting Information
- Key Points (Grouped by Topic)
- Decisions
- Issues with Resolutions
- Risks with Mitigations
- Action Items
- Note

The agent may prompt you to add any missing information, this can be provided or ignored



IPRO Meeting Assistant

Here's the structured IPRO meeting summary based on the transcript you provided:

Meeting Information

- **Title:** Program Review Committee
- **Date:** 2025-12-04
- **Time:** 6:58 PM EST
- **Organizer:** Shannon Wright
- **Attendees:** Shannon Wright, Matthew Roberts, Joe Gulotta, Nikolas Matthes, Edison Machado, Ira Dave, SeifAllah Salem, Ritha Choudhury-Rahman, Allison Xiong, Theresa Jacobellis, Vicky Cash, others mentioned in discussion.

Key Points (Grouped by Topic)

Year in Review & Achievements

Add missing due dates for action items

Highlight critical risks and issues

Group action items by owner

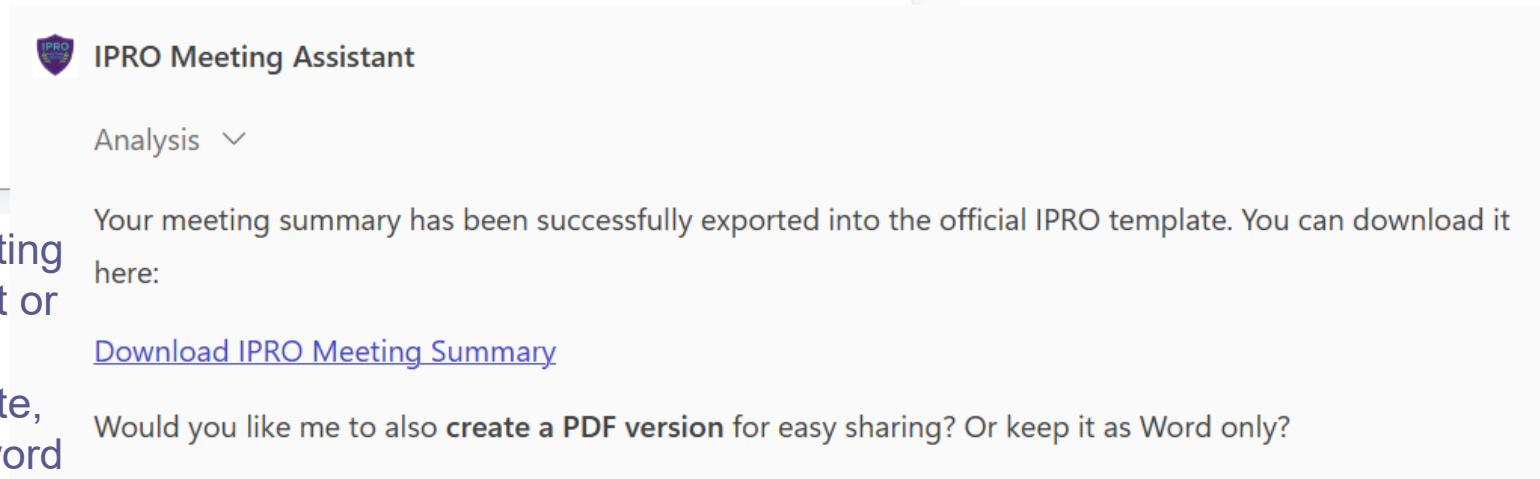
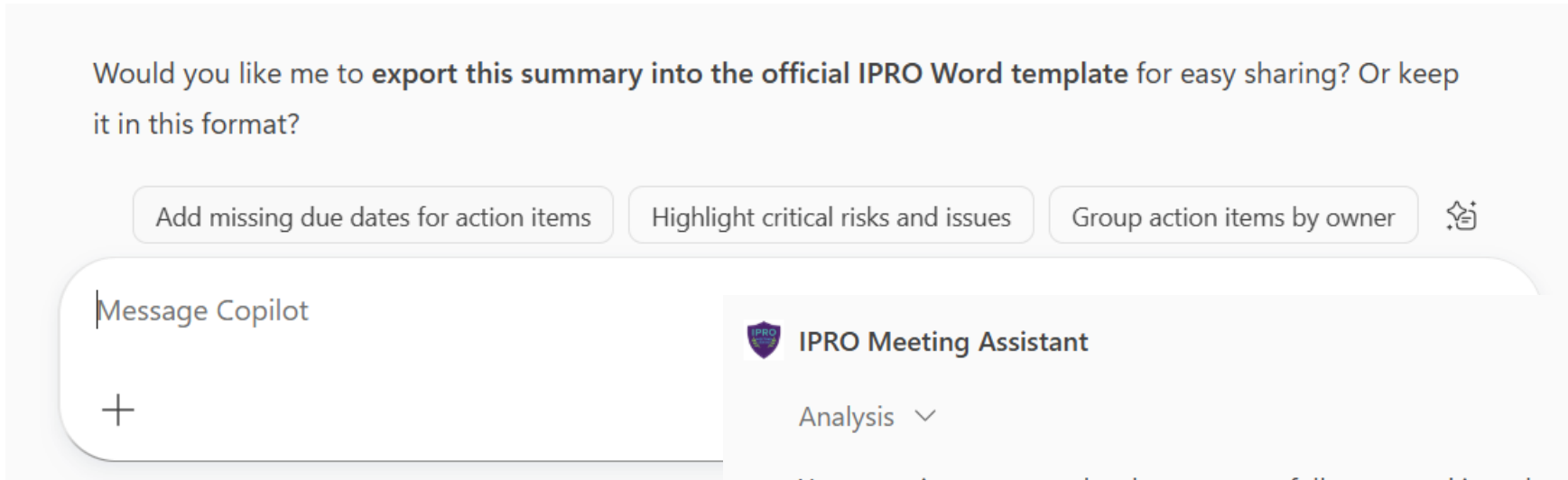


IPRO Meeting Template



The meeting agent may ask if you would like to export the summary into the official IPRO Word template, simply reply Yes and it will execute.

If the agent does not prompt the questions, you can manually type the command, output this meeting into the IPRO word template.



- You can simply copy and paste the meeting summary from copilot into any document or email.
- If you choose to use the meeting template, we recommend that you download the word version to allow you to make edits.



Copilot is the Draft, Finalizing Requires Human Review



Remember: Copilot is a powerful tool designed to help you work faster and smarter, but it's important to remember that its output is generated based on available data and patterns—it may not always be perfect.

Always review the content for accuracy, completeness, and tone before sharing or using it.

Make adjustments as needed to ensure it aligns with your goals, organizational standards, and context.

- Verify facts and figures – Ensure data is correct and up to date.
- Check tone and clarity – Confirm it matches your audience and purpose.
- Adapt for context – Tailor the output to your specific scenario.
- Add missing details – Fill in gaps that Copilot may not cover.

Part 3:

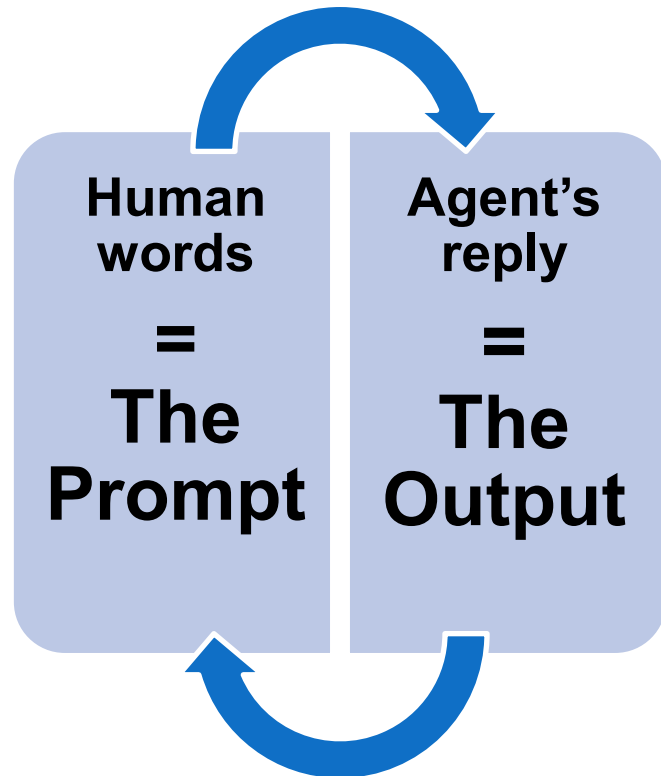
Optional Additional Prompts

Prompting the IPRO Meeting

What is a prompt?



A prompt is just what you type or say to the IPRO Meeting Assistant (Or any other GenAI agent) to tell it what you want it to do.



4 Areas to focus when writing prompts

What is the context: “attached meeting transcript and any additional meeting documents”

What we want: “summarize...”

How to format it: “List Key Points at the beginning followed by Risks, Issues, Decisions, and Action Items”

Extra context: Include meeting name/date/attendees from meeting

Prompting the IPRO Meeting Assistant

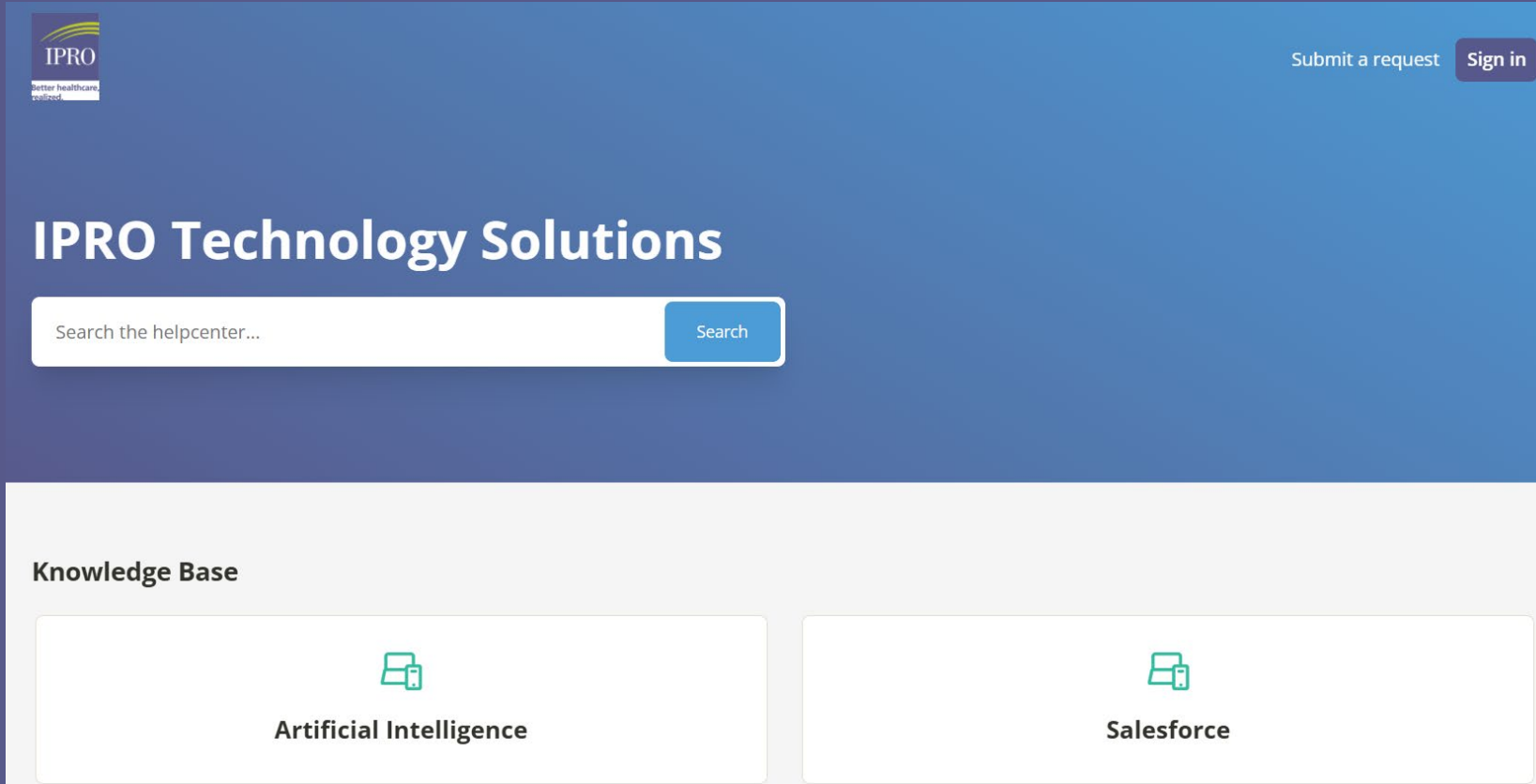


After you use the initial starter prompt to summarize your meeting, you can send follow up prompts to ask the agent to complete more tasks:

What is the Context?	What we want?	How to Format it?	Extra Context
<ul style="list-style-type: none">• "Using the meeting summary and action items"	<ul style="list-style-type: none">• "Draft a professional email I can send"	<ul style="list-style-type: none">• "highlight the decisions and responsible parties for each action item"	<ul style="list-style-type: none">• "include the meeting status and follow up request"

Full Prompt: Using the meeting summary and action items you just created, draft a professional email I can send to all attendees and highlight the decisions and responsible parties for each action item. Please include the meeting status and a follow up request

Questions?



The screenshot shows the top section of the IPRO Technology Solutions help center. It features a blue header with the IPRO logo on the left, which includes the tagline "Better healthcare, realized." In the top right corner of the header, there are two links: "Submit a request" and "Sign in". Below the header, the main title "IPRO Technology Solutions" is displayed in a large, white font. Underneath the title is a search bar with the placeholder text "Search the helpcenter..." and a blue "Search" button. Below the search bar, there is a section titled "Knowledge Base" which contains two white boxes. The first box is labeled "Artificial Intelligence" and the second box is labeled "Salesforce". Both boxes feature a green icon of a document and a mobile phone.



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<https://techsolutions.ipro.help/hc/en-us>