

AI minute taking in Microsoft Teams

Overview

This guide walks you through how to use Microsoft Teams and AI tools like Microsoft Copilot to automatically capture meeting minutes, action items, and summaries.

Step-by-step instructions

1. Schedule your meeting

- Open Microsoft Teams → Go to Calendar
- Click 'New Meeting' → Add title, date, time, and participants
- Send the invite
- Ensure that recording is enabled

2. Start recording and transcription

- During the meeting, click 'More' (•••) → Select 'Start recording'
- Transcription starts automatically with recording
- Inform participants and get verbal consent if needed

3. Use Microsoft Copilot (if available)

- Copilot will summarise the meeting
- Highlight decisions and action items
- Share notes in the meeting chat
- Note: Copilot requires a Microsoft 365 licence with Copilot access

4. Access the transcript and notes

- After the meeting, go to the meeting chat
- You'll find the recording, transcript, and any AI-generated summary

5. Share and store the minutes

- Copy the transcript or summary into OneNote, Word, or Loop
- Highlight key points and action items
- Share with attendees or store in a shared folder

Best practices

- Always inform participants when recording
- Review AI-generated notes for accuracy
- Use summaries to follow up on action items
- Store minutes securely and accessibly