

AUTOMATE **Beginner** 10 MIN · UPDATED 2026-10-01

Ground a Copilot Notebook in specific email threads.

Add specific Outlook email threads as references in a Copilot Notebook so project context includes the decisions made over email, not just meetings and files.

MICROSOFT 365

Outlook

OneNote

WORKS WITH

Copilot

Business Outcome

Project notebooks that reflect decisions made over email, not just what happened in meetings.

Workflow Steps

Step 1: Identify the email threads that actually carried a decision

Outlook

Not every email is worth referencing — pick threads where something was actually decided or committed to, not routine back-and-forth.

Step 2: Add the threads as references in the notebook

Copilot

Use the notebook's "Add source" option and select the individual threads you identified, one at a time, rather than pointing it at a whole mailbox folder — a folder-level reference pulls in every routine reply alongside the decisions, diluting exactly the precision step 1 was meant to create.

Step 3: Ask a question that connects email decisions to the rest of the project

Copilot

The value is in the connection — ask something like "does the budget we agreed over email match what's in the latest plan."

Step 4: Resolve any conflict between email and other notebook sources

OneNote

If the email thread says one thing and a meeting note says another, figure out which is current before treating either as settled.

✓ Check the work

- Referenced threads are ones that actually carried a decision, not routine noise.
- Any conflict between email and other notebook sources was resolved, not left standing.
- The notebook's email references stay current as new relevant threads appear.

Expected Outcome

A Copilot Notebook with relevant email threads referenced alongside meeting notes and files.

Want help rolling this out across your team? [Go to Liminals.Tech](#) 📖