

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

Ground a Copilot Notebook in a specific Teams meeting.

Reference an individual Teams meeting as a knowledge source inside a Copilot Notebook, instead of manually copying the transcript in.

MICROSOFT 365

OneNote

Teams

WORKS WITH

Copilot

Business Outcome

Project notebooks that stay current with meeting context automatically, not from manual copy-paste.

Workflow Steps

Step 1: Open the project's Copilot Notebook

OneNote

Use the notebook you're already tracking this project in, rather than starting a new one for every meeting.

Step 2: Add the specific Teams meeting as a reference

Copilot

Use "Add source" in the notebook and pick the individual meeting from your calendar or the channel's meeting list, not the channel itself — referencing the whole channel pulls in every meeting that's ever happened there, which buries this specific meeting's content in unrelated context.

Step 3: Ask a question that spans the meeting and prior notebook content

Copilot

The value is connecting this meeting to what's already in the notebook – ask something like "how does what we decided today change the plan from last week."

Step 4: Flag anything that contradicts earlier notebook content

OneNote

If the new meeting conflicts with a decision already recorded, resolve which one stands rather than letting the notebook hold two contradictory "facts."

✓ Check the work

- The referenced meeting's transcript and shared files are actually accessible from the notebook.
- Any contradiction between the new meeting and prior notebook content was resolved, not left ambiguous.
- The notebook stays scoped to this project, not every meeting on the calendar.

Expected Outcome

A Copilot Notebook with the meeting's transcript, notes, and shared content available as a live reference.

Want help rolling this out across your team? **Go to Liminals.Tech** 📄