

MS Excel Copilot Fundamentals – Effective AI- Assisted Work and Data

The “MS Excel Copilot Fundamentals – Effective AI-Assisted Work and Data Analysis” training course is an intensive, practical introduction to working with artificial intelligence in Microsoft Excel. The program is designed for people who want to explore the capabilities of Microsoft Copilot and start using AI to work with data and reports faster, more conveniently, and more efficiently.

During the training, participants will learn how to use Copilot to create formulas, analyze data, prepare summaries, generate insights, and build clear reports and charts. The course follows a workshop-based approach, with participants working through practical examples and exercises that reflect real-world office tasks and business cases.

A strong emphasis is placed on the practical application of AI in Excel, effective prompt writing for Copilot, and the automation of simple, repetitive tasks. Participants will also learn data management best practices and the principles of using AI solutions securely and responsibly within an organization.

The training enables participants to quickly acquire practical skills and demonstrates how to make the most of Microsoft 365 tools to streamline daily work, save time, and improve overall productivity when working with Excel.



Training recipients

This training is designed for people that want to start using AI in Microsoft Excel in a practical way and

explore the capabilities of Microsoft Copilot in everyday office and analytical tasks. The program is intended for anyone who works with data, reports, and spreadsheets in Excel. It is also well suited for managers and specialists who want to improve their productivity, automate repetitive tasks, and use AI to create analyses and reports in a quicker and efficient manner.



Benefits

1. Start use AI in everyday work with Excel.
2. Significantly reduce the time required to create formulas and perform data analysis.
3. Prepare reports and management summaries more efficiently.
4. Learn how to write effective prompts for Microsoft Copilot.
5. Automate repetitive tasks in Excel.
6. Use AI solutions in an informed, responsible, and secure manner within their organization.



Training program

Introduction to Microsoft Copilot in Excel

- What is Microsoft Copilot?
- How Copilot works in Excel
- Technical requirements and licensing
- User interface and available features
- Real-world use cases in everyday work:
 - Data analysis
 - Reporting
 - Formula creation
 - Summarization
 - Data visualization

Hands-on exercises:

- Launching Copilot in Excel
- Creating your first AI prompts

Creating and Explaining Formulas with Copilot

- Generating formulas from natural language descriptions
- Creating common functions:
 - SUM
 - AVERAGE
 - IF
 - XLOOKUP

- COUNTIF

- Explaining existing formulas
- Troubleshooting and optimizing formulas
- Translating complex functions into plain language

Hands-on exercises:

- Creating formulas with Copilot
- Analyzing and correcting faulty formulas

Data Analysis with Copilot

- Preparing data for AI-assisted analysis
- Asking questions about data:
 - Trends
 - Anomalies
 - Comparisons
 - Summaries
- Automatically generating analyses and insights
- Creating summaries
- Identifying patterns and relationships in data

Hands-on exercises:

- Analyzing a sales dataset
- Generating summaries and recommendations
- Detecting inconsistencies and anomalies in data

Data Visualization and Reporting

- Creating charts with Copilot
- Choosing correct visualizations
- Generating PivotTables
- Automatically creating report descriptions and commentary

Hands-on exercises:

- Generating charts from text-based instructions
- Building a simple management report

Automating Work in Excel with Copilot

- Cleaning and organizing data
- Formatting tables and reports
- Generating step-by-step instructions
- Introduction to process automation in Microsoft 365

Hands-on exercises:

- Automatically preparing and transforming data
- Formatting reports with Copilot assistance

Best Practices and AI Security

- How to write effective prompts
- Common user mistakes
- Limitations of Copilot

- Validating AI-generated results
- Data security and organizational AI policies

Hands-on exercises:

- Creating effective prompts
- Evaluating the quality of Copilot responses



Expected preparation of the participant

None



Duration

1 days / 7 hours

Language

English