



MICROSOFT



COPILOT IN EXCEL

WORK SMARTER,
NOT HARDER



Copyright©2025 Virtual Training Co. All rights reserved. This publication or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise without written permission of Virtual Training Co, W5813 Timber Trail, New Lisbon, WI 53950.



Table of Contents

- Microsoft Copilot 365 4
 - New User Interface 4
 - New URL 5
- Copilot Chat 5
 - Copilot Work vs Web 6
 - Real-Time Prompt Suggestions 7
- Copilot in Excel 10
 - Copilot Icon is Greyed Out 10
 - What Copilot in Excel Can Do 11
 - Talk to Copilot 12
 - How to use Copilot in Microsoft Excel 12
 - Sample prompts for using Copilot in Excel 13
 - Excel Tables 14
 - Use a Range of Data with Copilot 15
 - Analyzing Data with Copilot 16
 - Chat History 16
 - Chat Box 17
 - Create Formulas with Copilot 17
 - Format Data with Copilot 19
 - Conditional Formatting 19
 - Sort or Filter Data 20
 - Sort Data 20
 - Filter Data 20
 - Create Charts and PivotTables with Copilot 20
 - Create a Chart with Copilot 20
 - Create a PivotTable with Copilot 21
 - Ask Copilot How To 21
 - Have Copilot Combine Data 21
- Prompt Suggestions for Copilot in Excel 22
 - Forecasting 23



Formula Assistance 23

Create a table specific to your needs 24

Pull in data from the graph and search the web 25



Microsoft Copilot 365

It is evident that Microsoft is heavily investing in artificial intelligence, and Copilot exemplifies the significant capabilities of these technologies.

Microsoft's commitment to Copilot in 2025 includes a fully integrated AI assistant across Microsoft 365, Dynamics 365, and Power Platform. Copilot offers features such as seamless integration, contextual understanding, real-time collaboration, cross-platform accessibility, and industry-specific solutions. It can boost productivity in Word, Excel, PowerPoint, Teams, Power Automate, and beyond.



With features like **real-time prompt suggestions, document summarization, and intelligent chat**, Copilot 365 transforms the way individuals and organizations work, fostering efficiency and innovation. This commitment underscores Microsoft's vision of creating a seamless, secure, and intelligent digital workspace for everyone.

New User Interface

Microsoft Copilot has introduced several exciting updates to its user interface recently:

1. Copilot Chat Enhancements:

- Real-time Prompt Suggestions: Save time by leveraging prompt suggestions based on your chat history.
- Pages in Copilot Chat: Turn Copilot responses into editable pages that you can share and collaborate on.



2. Copilot in Word and PowerPoint:

- Draft Smarter in Word: Seamlessly attach rich content from emails and meetings.
- Refine Presentation Text in PowerPoint: Use Copilot to fix grammar, condense text, or enhance tone for a professional touch.



3. Copilot Studio:

- Generative Actions: Replace manual topic triggers with AI-powered orchestration for more fluid conversations.

4. Mobile App Improvements:

- View, Edit, and Share Copilot Pages on Mobile: Stay productive on the go with the Microsoft 365 mobile app.

5. Copilot on Edge:

- Enhanced Large File Support: Work seamlessly with larger documents in Copilot Chat.
- These updates aim to boost productivity and make interactions with Copilot more intuitive and efficient.

New URL

Microsoft has a new URL/Web Address for Copilot: www.M365Copilot.com.

The old one was www.Microsoft.com/copilot.

Other Ways to Access Copilot is with Outlook, Teams and your Microsoft account.

Copilot Chat

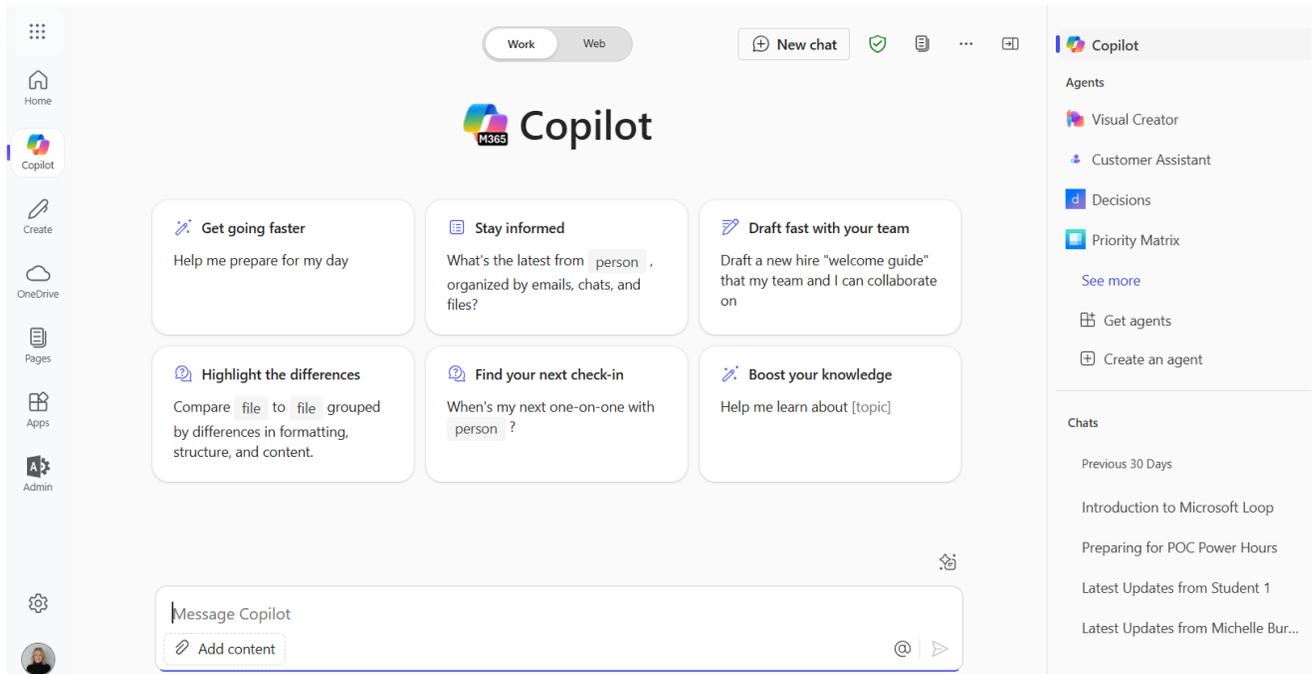
Copilot for Microsoft 365 combines the power of large language models (LLMs) with the intelligence of Microsoft Graph to help you get things done. If authorized by your organization, you have the option to add plugins for more data sources (like apps and web content) that Copilot will interact with on your behalf.

Copilot can synthesize data from multiple sources to give you a summary of things you need to catch up on, including your files, messages, meetings, emails, and people. It can also help you find and use info that's buried in documents or lost in conversations. And with Copilot by your side, you can create content with it all.



Ask a work-related question, or try one of these:

- Draft a message with action items from my last meeting.
- Catch up on my unread emails.
- How do I write a request for proposal?



Copilot Work vs Web



Microsoft 365 Copilot offers two distinct modes: **Work** and **Web**. Here's a quick overview of each:

Work Mode

- **Purpose:** Designed for tasks involving internal data.
- **Data Source:** Utilizes your organization's Microsoft Graph, including emails, documents, and calendars.
- **Use Cases:** Drafting internal communications, summarizing meetings, accessing organizational policies.



Web Mode

- **Purpose:** Ideal for tasks requiring external information.
- **Data Source:** Pulls data from the public internet.
- **Use Cases:** Market research, finding external resources, exploring general knowledge.

Key Differences

- **Work Mode:** Accesses internal data for personalized assistance.
- **Web Mode:** Retrieves information from the public internet for broader research.

When to Use Each Mode

- **Work Mode:** Handling sensitive information or accessing internal documents.
- **Web Mode:** Conducting market analysis or exploring external knowledge.

Real-Time Prompt Suggestions

Real-time prompt suggestions in Copilot are designed to enhance your productivity by offering relevant prompts based on the context of your conversation. Here's how it works:

1. **Context Analysis:** As you type, Copilot analyzes the context of your conversation to understand the topic and your intent.
2. **Prompt Generation:** Based on this analysis, Copilot generates a list of suggested prompts that are relevant to your current discussion.
3. **User Selection:** You can choose from these suggestions to quickly continue the conversation without having to type out the entire prompt yourself.

This feature helps streamline your interactions, making it easier to find the information you need or complete tasks more efficiently.



Let's say you're discussing a project update in Copilot Chat. Here's how real-time prompt suggestions might work:

1. **You type:** "We need to finalize the project timeline."
2. **Copilot analyzes:** It understands you're talking about project management and timelines.
3. **Prompt suggestions appear:** Copilot might suggest prompts like:
 - "Can you provide a draft timeline for review?"
 - "What are the key milestones for this project?"
 - "Who will be responsible for each task?"

You can then select one of these suggestions to quickly continue the conversation. This feature helps you stay focused and efficient by reducing the time spent typing and thinking about what to ask next.

Here are some of the **best and most useful Excel prompt ideas** you can use to boost productivity, automate tasks, and analyze data more effectively. These prompts are grouped by category for easier navigation:

Data Analysis & Visualization

- "Create a pivot table to summarize sales by region and product category."
 - "Generate a line chart showing monthly revenue trends for the past year."
 - "Highlight duplicate entries in a column using conditional formatting."
 - "Calculate the correlation between two columns of numerical data."
-



Formulas & Functions

- "Write a formula to calculate the compound annual growth rate (CAGR)."
 - "Use VLOOKUP to find the price of a product based on its ID."
 - "Create a formula that returns 'Yes' if a date is within the last 30 days."
 - "Use IF, AND, and OR to flag rows that meet multiple conditions."
-

Financial Modeling

- "Build a loan amortization schedule with monthly payments and interest."
 - "Create a dynamic budget tracker with income and expense categories."
 - "Calculate net present value (NPV) and internal rate of return (IRR) for a project."
-

Date & Time Calculations

- "Calculate the number of working days between two dates, excluding holidays."
 - "Extract the month and year from a date in separate columns."
 - "Create a formula to determine if a date falls on a weekend."
-



Data Cleaning & Transformation

- "Split full names into first and last names using formulas."
 - "Remove extra spaces and convert text to proper case."
 - "Combine multiple columns into one with a delimiter (e.g., comma)."
-

AI-Powered Excel (Copilot or Office Scripts)

- "Summarize this dataset and highlight key trends."
- "Write an Office Script to automate copying data from one sheet to another."
- "Generate insights from this sales data using natural language."

Copilot in Excel

Copilot in Excel helps you do more with your data. Starting with a table with data, you can tell Copilot what you want to know using natural language. It can help show correlations, suggest new formulas based on your questions, and generate insights that help you explore your data. Format and organize your data, create visualizations, or ask for general formula column suggestions based on your data.

Copilot in Excel works for Excel tables of up to two million cells. Some skills like formula column suggestions, highlight, sort, and filter do not have a limit on the amount of data you can interact with. However, it can take a long time, even 30 seconds or more, to get a response from Copilot when interacting with large tables.

Copilot Icon is Greyed Out

The button in Excel is greyed out means you are using a local file; the copilot feature only works with files stored in OneDrive for Business/SharePoint while using Excel.



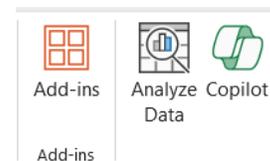
What Copilot in Excel Can Do

Copilot in Excel is a powerful tool that can help you visualize, analyze and transform data in your spreadsheets in many ways. Here's what it can do for you:

- **Data analysis.** Copilot looks at your tables and brings important information into focus. You can then dig deeper by questioning Copilot.
- **Modeling.** When working on financial modeling, you can explore different scenarios by asking "what-if" questions and providing prompts such as "model how a change to X would affect Y"
- **Visualizations.** AI helps you create charts and graphs to visualize your data in a clear and understandable way.
- **Writing formulas.** Copilot assists in writing formulas for your calculations, making complex formula creation easier and more accessible.
- **Organizing and cleaning data.** Copilot can quickly clean up messy data for you. It can remove extra spaces, merge values from different columns, highlight duplicates, sort, filter, and more.
- **Suggestions.** Get intelligent recommendations for formulas, functions, and actions based on your context.
- **Insights.** Uncover interesting insights within your data, like trends, outliers, or correlations between different parts.
- **Automating tasks.** Copilot can even write VBA code to help you automate common tasks. This is like creating kind of shortcuts for things you do often.

Copilot in Excel is a handy helper that makes your work easier and helps you get more done without all the hard work.

Select **Copilot** on the ribbon to open the chat pane. Enter your prompts and start working with Copilot.

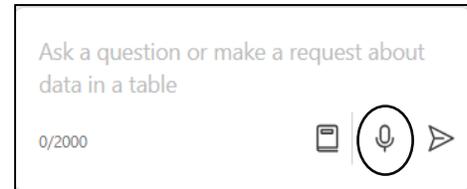




Talk to Copilot

Use the microphone icon at the bottom right corner of the Copilot window. This will allow you to talk directly to the system to enter the prompts instead of typing.

The microphone is now available in all apps.



How to use Copilot in Microsoft Excel

Copilot for Microsoft 365 in Excel is designed to enhance productivity and efficiency by leveraging AI to assist with various tasks. Here are some key ways you can use Copilot in Excel:

- **Generating formula suggestions:** Copilot can suggest formulas based on the data in your Excel tables, making it easier to perform complex calculations without needing to remember specific formulas.
- **Data insights:** Copilot can analyze your data and provide insights through charts, PivotTables, and summaries. For example, it can highlight trends, outliers, and key metrics.
- **Data visualization:** You can ask Copilot to create various types of charts and graphs, such as bar graphs, line charts, and pie charts, to visualize your data effectively.
- **Data transformation:** Copilot can help you transform data by adding new columns, filtering data, and applying conditional formatting based on specific criteria.
- **Automating tasks:** Copilot can automate repetitive tasks, such as sorting and filtering data, creating trackers, and generating reports.



Sample prompts for using Copilot in Excel

Here are more examples of how Copilot for Microsoft 365 can be used in Excel to enhance productivity and efficiency:

1. **Adding formula columns:** You can ask Copilot to add new columns with specific formulas. For example:

"Add a new column showing the percentage difference between column A and column C."

2. **Highlighting data:** Copilot can help you highlight specific portions of your data based on certain criteria. For example:

"Highlight all cells in column B that are greater than 100."

3. **Sorting and filtering:** You can use Copilot to sort and filter your data quickly. For example:

"Sort data in column D in descending order"

4. **Analyzing data:** Copilot can provide insights and analysis of your data. For example:

"Analyze the sales data and provide a summary of the key trends."

5. **Visualizing data:** You can ask Copilot to create various types of charts and graphs. For example:

"Create a bar graph showing the sales growth between Q2 and Q3."

6. **Automating tasks:** Copilot can automate repetitive tasks, such as generating reports or creating trackers. For example:

"Generate a monthly sales report for the last six months."

7. **Data transformation:** Copilot can help you transform data by adding new columns, filtering data, and applying conditional formatting. For example:

"Add a new column that calculates the running total of sales in column E."



These examples demonstrate the versatility and power of [Copilot in Excel](#), making it an invaluable tool for MSPs looking to streamline their operations and deliver superior service to their clients

Excel Tables

Microsoft Copilot in Excel helps you do more with your data in Excel tables by generating formula column suggestions, showing insights in charts and PivotTables, and highlighting interesting portions of data.

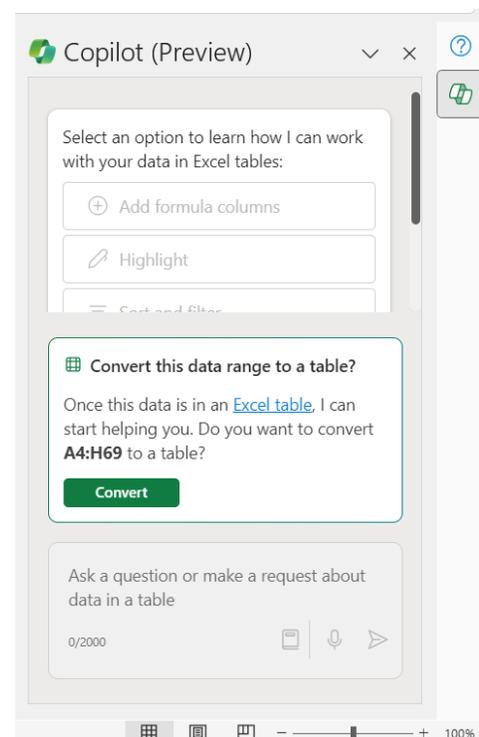
You'll need to have a table that includes data in a worksheet before using Copilot in Excel. Quickly turn a range of cells into a table by following these steps:

A table can include the following elements:

Header row - By default, a table has a header row. Every table column has filtering enabled in the header row so that you can filter or sort your table data quickly. Related data easier, you can turn a range of cells into an Excel table.

Calculated columns - By entering a formula in one cell in a table column, you can create a calculated column in which that formula is instantly applied to all other cells in that table column.

Banded rows - Alternate shading or banding in rows helps to better distinguish the data.





Total row - Once you add a total row to a table, Excel gives you an AutoSum drop-down list to select from functions such as SUM, AVERAGE, and so on. When you select one of these options, the table will automatically convert them to a SUBTOTAL function, which will ignore rows that have been hidden with a filter by default. If you want to include hidden rows in your calculations, you can change the SUBTOTAL function arguments.

Create a Table in Excel:

1. Select a cell within your data.
2. Select Home and choose  Format as Table under Styles.
3. Choose a style for your table.
4. In the Create Table dialog box, confirm or set your cell range.
5. Mark if your table has headers and select OK.

Use a Range of Data with Copilot

Users are no longer limited to using Copilot in Excel only in Excel tables, because Copilot in Excel now works on data ranges resembling tables with a single row of headers on top. This saves time by eliminating the need to format data, so users can start analyzing with Copilot right away.

In addition, the edit box is now available on any Excel worksheet, regardless of the selected cell. Copilot will reason over the nearest table, or data range resembling a table, to the user's selected grid area on the same worksheet. This enables users to interact with Copilot immediately, regardless of their position in the worksheet, saving time and increasing productivity.

If you prefer to keep your data in a range and not convert it to a table, it will need to meet all of the following requirements:

- Only one header row
- Headers are only on columns, not on rows
- Headers are unique; no duplicate headers
- No blank headers
- Data is formatted in a consistent way



- No subtotals
- No empty rows or columns
- No merged cells
- File locale is English and the country is United States

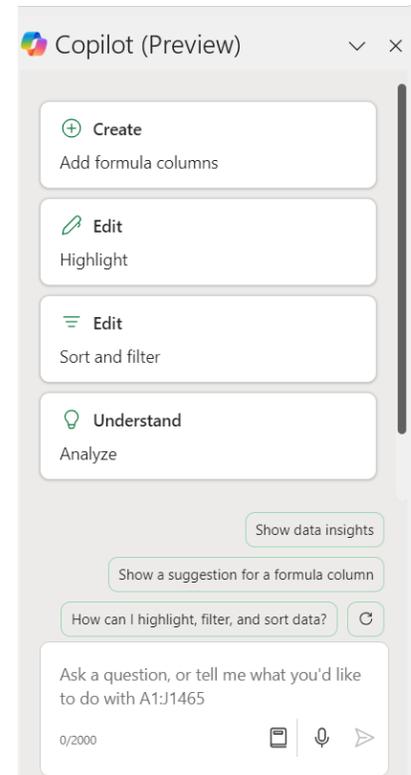
Analyzing Data with Copilot

Once the Excel data is in a table or range, you will be ready to use Copilot.

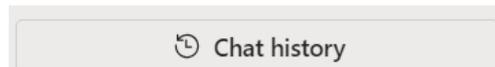
Open Copilot from the Home tab of the Ribbon. It will open a pane on the right side of the window. You can use the suggestions or ask a question.

Suggestions include:

- **Create** – Add formula columns
- **Edit** – Highlight
- **Edit** – Sort and filter
- **Understand** – Analyze



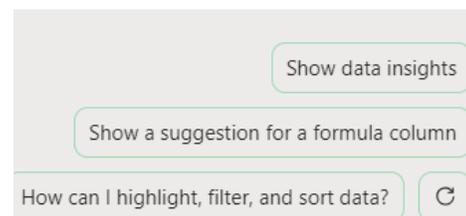
Chat History



The history of previous chats is available by clicking on Chat History.

Under the Chat History, you will find:

- Show data insights
- Show a suggestion for a format column
- How can I highlight, filter and sort data?





Chat Box

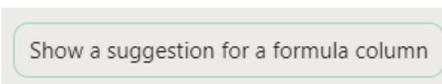
The Chat box is where the chats will be placed or typed. The tools menu includes:

- Show Prompts – will display the suggestion prompts.
- Microphone – will allow you to talk with Copilot.
- Send – sends the chat in the window.



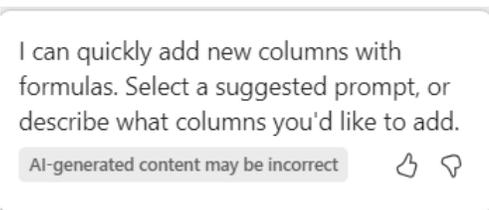
Create Formulas with Copilot

Formula columns in Copilot for Microsoft 365 allow you to create new columns in your table that perform calculations based on existing data. For example, you might use a formula column to calculate the total cost per product, or to calculate the profit for each marketing campaign. With formula columns, you don't need to manually enter calculations for each row in your table.



You can have Copilot suggest formulas after analyzing your data set or you can have it insert a new column based on the information you provide.

1. With your data ready, open the Copilot pane.
2. Choose Show a suggestion for a formula column or Add new column....
3. Type in your prompt or use the microphone to talk with Copilot.

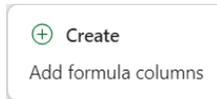




Examples:

- Calculate total cost per product in a new column.
- Add a column that calculates the total profit for each marketing campaign in 2022.
- Add a column that calculates the number of days after the product launch event.

1. Click .
2. In the prompt area at the bottom, type in what you want Copilot to do.



In the years of service column create a formula to calculate how many years of service from the start data to date left. If date left is empty enter still employed.

```
=IF(ISBLANK([[Date Left]]),"Still Employed",DATEDIF([[Start Date]],[[Date Left]],"y"))
```

Show explanation ▾

	L
3	Years of Service2
4	35
5	7
6	Still Employed
7	Still Employed
...	...



AI-generated content may be incorrect



Format Data with Copilot

With Copilot for Microsoft 365, it's easy to highlight, sort, and filter your tables (or data in another supported format) to quickly call attention to what matters to you.

With a single table, you can effortlessly:

- Sort and filter your data.
- Apply simple conditional formatting.

Tell Copilot how you'd like to manipulate the table to better view portions of your data. You can type in your own words or use the suggested prompts.

Conditional Formatting

To highlight your data, try this:

- Bold the top 10 values in the Sales column.
- Highlight the highest values in Units Sold.

Always include the name of the column in your



Sort or Filter Data

Sort Data

To sort your data, try this:

- Sort engagement rate from smallest to largest.

Filter Data

To filter your data, try this:

- Filter items that are due next week.

Create Charts and PivotTables with Copilot

Create a Chart with Copilot

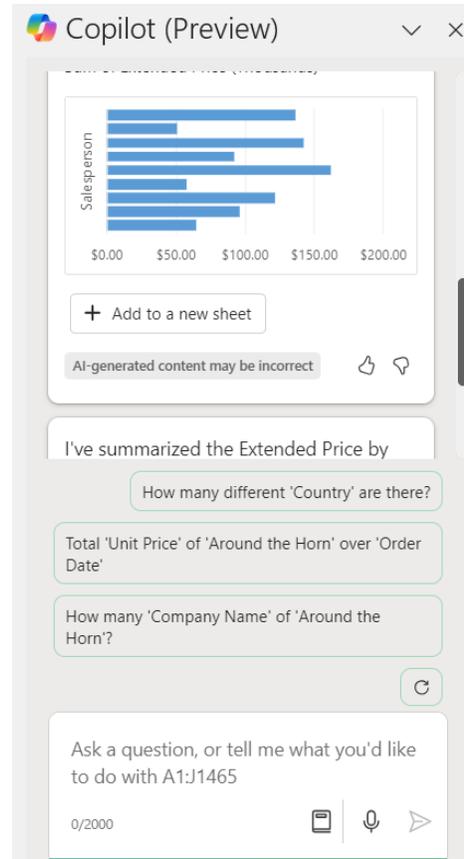
Copilot in Excel can create a chart, PivotTable and more.

1. Create a Chart based on the Department and Salary.

Next, we can choose to place the chart on a new sheet. It's important to mention that Copilot typically adds elements into Excel as a PivotTable and PivotChart by default, even if aggregation isn't required for the task at hand. As a result, it's crucial to be familiar with using these functions in Excel.

Copilot may offer a concise plot summary to support understanding, or it can serve as an initial reference for discussion with peers to enhance their comprehension.

We can deepen our analysis by examining different data compilations.





Create a PivotTable with Copilot

Copilot in Excel can even create a PivotTable. You can type out the instructions or talk with Copilot.

1. **Select Your Data:** Click on a cell within your table or data range.
2. **Use Copilot:** In the Copilot pane, you can type a prompt like “Create a PivotTable showing the total sales by region.” Copilot will generate the PivotTable based on your data.

Ask Copilot How To

Want to learn how to use specific features in Excel. Ask Copilot how.

Have Copilot Combine Data

If you have a separate column of data that you want to combine together, ask Copilot to do it.

Country	Salesperson	Sum of Extended P...
Argentina	Andrew...	\$944.50
Austria	Anne D...	\$6,737.20
Belgium		\$2,866.50
Brazil		\$7,539.25
Canada		\$9,143.70
...



Prompt Suggestions for Copilot in Excel

Try any these:

- "Simplify this formula [formula]"
- "What formula should I use for [task]"
- "How do I change labels on a bar graph"
- "How do I create a drop-down list"

Ask Copilot, "Split the name column into first name and last name."

Ask Copilot follow-up questions, get clarification to responses, or chat about other things.

Ask Copilot: "Tell me what I can do with Copilot in Excel."

1. Enter your prompts and start working with Copilot.

Here are some samples to get you started:

- *"Create a bar graph showing the sales growth between Q2 and Q3."*
- *"Bold the top 3 values in Annual Sales."*
- *"Add a new column showing the percentage difference between column A and column C."*

Predict next quarter's sales," and Copilot will analyze the data and provide forecasts.

How many different products are being sold?



Forecasting

Scenario: Predict next year's sales based on current data.

Steps:

- Ensure your sales data is up to date and formatted correctly.
- Type into Copilot: "Predict next year's sales based on current data."
- Copilot will use historical data trends to forecast future sales, providing a detailed graph and possibly a regression analysis.

Formula Assistance

Scenario: You need help applying a complex formula to calculate the depreciation of equipment.

Steps:

- Ask Copilot by typing: "How do I calculate depreciation for equipment using the double declining balance method?"
- Copilot will suggest the appropriate formula and can automatically apply it across your dataset.

Example Output:

- A step-by-step guide on setting up your depreciation formula, and auto-filled cells with calculated values.

Refining Requests and Automation

- **Be specific:** The specificity of your requests can greatly enhance Copilot's effectiveness. Clearly define your data ranges and desired outcomes.
- **Automate Tasks:** For repetitive tasks like monthly financial reporting, ask Copilot to automate these processes based on new data entries.



Security and Privacy

Always consider data security when using AI tools:

- Review Microsoft's privacy settings to ensure your data handling practices align with your organization's data protection policies.
- Use secure connections and regularly update your software to protect your data integrity.

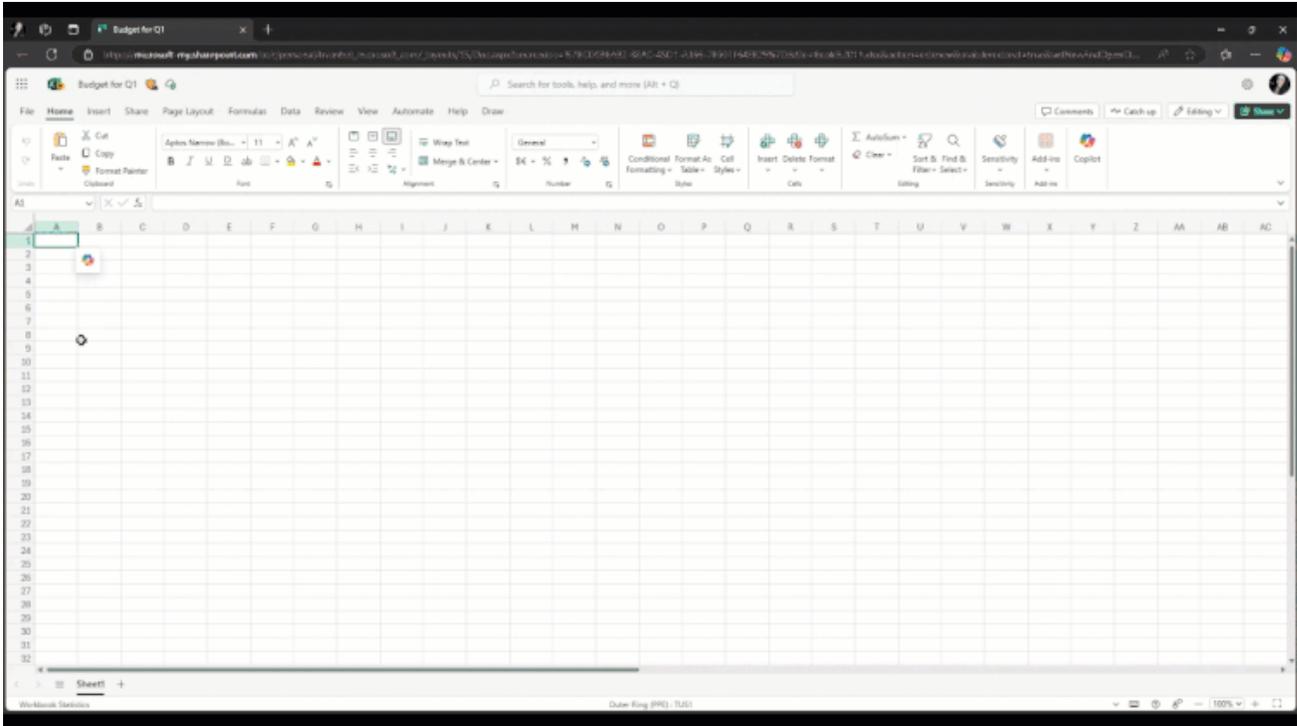
I interact with Copilot using natural language prompts. Here are some examples of what I might say:

- Basic Calculations: "Calculate the total sales for Q1."
- Data Analysis: "Analyze the sales data and highlight any trends."
- Visualizations: "Create a bar chart showing monthly sales."

Create a table specific to your needs

Whether creating a project budget, inventory tracker or sales report, starting from scratch to create a spreadsheet that meets your needs can be daunting and time-consuming. Copilot in Excel's new start experience enables people of all skill levels to create a personalized table for their tasks. Simply tell Copilot what you want to create, and Copilot will suggest and refine a template with headers, formulas and visuals to get you off to a great start!

For instance, you can quickly create a table with information on your organization's sales team. Copilot can add columns, apply conditional formatting, and even change table colors on command, streamlining the creation and adjustment process. Once you're happy with your table you can insert it on the page and continue using Copilot.



A person uses Excel and clicks on the Copilot icon which opens a window. The person types a prompt asking for a table and Copilot creates the table. The person asks for additional adjustments which Copilot makes before inserting the table into the spreadsheet.

These updates will begin to roll out to Windows and web by the end of the year for those with a Microsoft 365 Copilot license.

Pull in data from the graph and search the web

Once you have the structure of your table, it's time to gather information you can add to it - Copilot can help here too. We're excited to announce that Copilot in Excel can reference Word, Excel, PowerPoint, and PDF files from your organizational data. For instance, you can ask Copilot in Excel to list the announcements from a newsletter drafted in Word. Copilot will respond with a list which you can insert into a new spreadsheet or copy and paste into your existing table.

You can stay in the flow of your work as you gather organizational information too. For example, you can ask Copilot for all the employees who report to a specific manager and insert this list into a spreadsheet.



You can also seamlessly search the web directly within Copilot in Excel to find public information like dates, statistics, and more without disrupting your workflow. For instance, you can look up a table of countries and their exchange rates. Easily copy and paste info into your table.

The screenshot shows the Microsoft Excel interface with a table of cities and countries. The Copilot sidebar is open on the right, displaying various options like 'Create formulas', 'Understand', 'Apply color and formatting', and 'Ask Copilot'. The table data is as follows:

City Name	Country
Mexico City Santa Fe	Mexico
Sydney Darling Harbour	Australia
Shanghai Nanjing	China
Sydney Pitt Street	Australia
Miami Design District	USA
Tokyo Ginza	Japan
Vancouver Pacific	Canada
Melbourne Collins	Australia
Miami Beach	USA
Madrid Gran Via	Spain
Chicago Magnificent Mile	USA
Paris Opéra	France
Boston Back Bay	USA
Dubai Marina	UAE
Chicago Riverwalk	USA
London Covent Garden	UK
Seoul Myeongdong	South Korea
Dallas Uptown	USA
Munich Schwabing	Germany
Vancouver Robson	Canada
Toronto Eaton Centre	Canada
Melbourne Bourke	Australia
Barcelona Diagonal	Spain
Tokyo Shibuya	Japan
Dubai Downtown	UAE
Los Angeles Beverly	USA
Munich Marienplatz	Germany
Buenos Aires Palermo	Argentina
Boston Seaport	USA
Beijing Wangfujing	China
Berlin Alexanderplatz	Germany
San Francisco Union Square	USA
New York Midtown	USA
New York SoHo	USA
Los Angeles Downtown	USA
Paris Elysee	France
Buenos Aires Recoleta	Argentina
Madrid Semano	Spain
Paris La Defense	France
Beijing Sanlitun	China
Sao Paulo Paulista	Brazil
Tokyo Akhastusa	Japan

Copilot in Excel gathers public data from the web.

One of the top customer requests is to import data from another Excel file. This is possible with Power Query but doing so takes time and knowledge not to mention that searching for the right file can be frustrating. Now you can ask Copilot for help finding and importing a table from an Excel file using everyday language. For example, say you want to add budget details to your sales team table. You can describe the data that you need and Copilot imports the relevant data from another Excel file to your sales team table. Because this import is powered by Power Query, it brings precise data directly from your organization's data sources, as a live refreshable connection. As your data is updated in the budget file, it also updates in your sales team table.

**Copilot in Excel syncs data in a table from another Excel file.**

These updates will begin to roll out by the end of the year to Windows and web for those with a Microsoft 365 Copilot license.

Text analysis updates help you understand your data better

Once data is prepared, the next crucial step is analysis. Copilot in Excel empowers users to gain insights without becoming spreadsheet specialists. And a lot of data is text-heavy such as customer feedback and survey results. Copilot in Excel's text updates can help you understand your data even better.

You can simply ask Copilot to summarize your text data and now Copilot includes citations helping you understand the source – this saves time and helps ensure accuracy.

Copilot in Excel provides a summary with citations.

Sometimes you may want to dig deeper to sort and rank the text data by topics. You can now just ask Copilot to do so. This helps you analyze unstructured text data much faster. For example, say you have thousands of customer reviews. Copilot can break them down into several topics like quality, service, and price, helping you quickly identify which topic you want to look into further. You can also insert the topics into a new column in the table to preserve the analysis results and enable the creation of PivotTables and charts to visualize topic quantities and trends, so you can decide what to do next without having to read through everything.

Copilot in Excel identifies topics in a sheet of survey data.

Copilot can help you understand the sentiment of text too, which is especially helpful with survey data. For example, you can ask "please summarize sentiment for column 'feedback'" and Copilot will analyze and provide insight on positive, negative, and neutral sentiment. Copilot gives you an option to insert sentiment data into the table as a new column.



Copilot in Excel identifies the sentiment in a sheet of survey data.

Text analysis is particularly valuable for organizations that rely on qualitative data to inform decision-making. By transforming raw text into actionable insights, Copilot in Excel helps professionals make data-driven decisions confidently and efficiently. Text analysis updates will begin to roll out by the end of the year to Windows, web, Mac, and iOS for those with a Microsoft 365 Copilot license.