

Navigating Microsoft 365 Copilot in Excel

OEM: AMA • Code: 07844

COURSE DESCRIPTION

Enhance productivity, streamline workflows and make data-driven decisions with confidence. Microsoft 365 Copilot is transforming how professionals interact with data and Excel is leading the way. Whether you're managing reports, analyzing trends, or simplifying workflows, Microsoft 365 Copilot in Excel empowers users to be faster, smarter, and more confident with data-driven decisions. In this hands-on express course, you'll learn how to harness the full potential of Microsoft 365 Copilot in Excel. From cleaning and formatting data to writing effective prompts and performing advanced analysis, this session provides practical, step-by-step instruction. You'll gain strategies for improving productivity and unlocking insights using AI, all without needing to be a tech expert. Walk away with a deeper understanding of how Microsoft 365 Copilot works, what to expect from its outputs, and how to use it responsibly within your organization. It's highly recommended that you have a Microsoft Copilot license for the optimal learning experience.

COURSE CONTENT SUMMARY

- Introduction to Microsoft 365 Copilot in Excel: What it is, what it's not, and the differences between Copilot and Microsoft 365 Copilot
- Getting started with Microsoft 365 Copilot in Excel, including navigating the interface and accessing Copilot features
- Overview of Copilot capabilities: Writing formulas, generating summaries, formatting
- Prompt writing fundamentals: How to give clear, effective instructions
- Hands-on practice: Data cleanup, dashboard creation, and aggregation using Microsoft 365 Copilot
- Troubleshooting: Understanding Copilot limitations and how to guide it
- Preparing your organization: Best practices for responsible use

AUDIENCE PROFILE

- Managers, team leaders, and business professionals who work with Excel will benefit from learning how to integrate Microsoft 365 Copilot effectively regardless of technical background.

PREREQUISITES

- This section doesn't contain any content.

COURSE OBJECTIVES

By the end of this course, participants will be able to:

- Gain confidence using Microsoft 365 Copilot in Excel to stay ahead in a modern, tech-enabled workplace
- Learn practical, hands-on skills you can immediately apply across business functions
- Save time and increase efficiency by automating repetitive Excel tasks using natural language prompts
- Learn prompt-writing best practices to maximize Microsoft 365 Copilot performance
- Transform how you work with data by leveraging Microsoft 365 Copilot to clean, format, and explore insights effortlessly
- Enhance your decision-making with faster data analysis, summaries, and visualizations
- Differentiate between Copilot Chat and Microsoft 365 Copilot and understand how Microsoft 365 Copilot works in Excel
- Navigate and activate Microsoft 365 Copilot features within Excel to enhance productivity and streamline workflows
- Develop and refine Microsoft 365 Copilot prompts to format, clean, summarize, and analyze Excel data using natural language
- Apply Microsoft 365 Copilot tools to business scenarios across departments
- Recognize Microsoft 365 Copilot's capabilities and limitations to use it effectively, confidently, and responsibly in the workplace

COURSE OUTLINE

Module 1: Microsoft 365 Copilot Overview

- Differentiate between Copilot Chat and Microsoft 365 Copilot and understand how Microsoft 365 Copilot works in Excel
- Navigate and activate Microsoft 365 Copilot features within Excel to enhance productivity and streamline workflows

Module 2: Effective Prompting for Excel

- Develop and refine Microsoft 365 Copilot prompts to format, clean, summarize, and analyze Excel data using natural language

Module 3: Copilot in Excel Application to Business Scenarios

- Apply Microsoft 365 Copilot tools to business scenarios across departments

Module 4: Advanced Tips, Troubleshooting, and Responsible Use

- Guide Microsoft 365 Copilot when it doesn't get it right the first time with advanced prompting tactics
- Troubleshoot common Microsoft 365 Copilot issues in Excel
- Ensure responsible use by checking for accuracy, protecting data privacy, and following ethical AI practices.