

Excel AI Course with Copilot

In this Excel AI course learn to use Copilot and other artificial intelligence tools to work more efficiently.

Introduction to AI in Excel

- Understanding AI and its role in modern data workflows
- Overview of AI tools integrated with Excel
 - Microsoft 365 Copilot
 - Python in Excel (via Copilot)
 - OpenAI tools (e.g., ChatGPT with Excel)
 - Power Platform AI features (Power Automate, Power BI AI visuals)

Getting Started with Copilot in Excel

- Enabling and accessing Copilot in Excel
- Microsoft 365 licensing requirements
- Supported platforms and versions
- Interface overview
- Navigating the Copilot Pane
 - Chat interface
 - Prompt templates
 - Context-aware assistance
- Collaborating with Copilot
 - Dedicated Copilot-generated analysis sheets
 - Preserving original data while working with AI

AI-Powered Data Interaction

- Asking natural language questions about data
- Text insights and summarization
- Copilot-generated visualizations
 - Charts

- PivotTables

Using Copilot for Data Analysis

- Identifying patterns, trends, and anomalies
- Scenario analysis and forecasting
- Generating automated insights
- Dashboard and summary sheet generation

Copilot and Data Manipulation

- Natural language for highlighting, sorting, and filtering
- Cleaning and formatting data
 - Removing extra spaces
 - Merging columns
 - Deleting duplicates
- Automating repetitive data tasks

Formula Assistance with Copilot

- Generating formulas with natural language
- Understanding and explaining existing formulas
- Suggesting new formulas for calculated columns
- Debugging and optimizing formulas

AI-Powered External Data Integration

- Retrieving external data with Copilot
 - Web-based content
 - Organizational sources (e.g., SharePoint, Teams)
- Verifying accuracy and attribution of sources

Using Python and Copilot Together in Excel

- Python in Excel overview
- Writing and running Python code with Copilot help
 - Statistical analysis
 - Data transformation
 - Visualization using matplotlib, seaborn
- AI-assisted advanced modeling in Excel

Enhancing Excel with OpenAI (ChatGPT)

- Using ChatGPT for formula generation and logic support
- Connecting Excel to OpenAI via APIs or Power Automate
- Developing a GPT-powered Excel assistant
- Advanced prompt engineering for Excel contexts

Other AI Tools for Excel and Business Intelligence

- Power BI AI features and visualizations
 - Smart narratives
 - Key influencers
 - Sentiment analysis
 - Document processing
 - Image-to-table AI

Best Practices and Considerations

- Writing effective AI prompts
- Ensuring privacy, accuracy, and responsible use
- Recognizing the limitations of AI tools

Hands-On Practice and Capstone Projects

- Guided AI projects
- Capstone: AI-enhanced Excel business report
 - Dashboards
 - Forecasts
 - Insights