Microsoft

# Using Copilot to Look at Data in Excel

Quick Reference Guide

Copilot simplifies data analysis and calculations

Working with data in Excel just got a major upgrade—thanks to Microsoft Copilot. Whether you're summing columns, building dashboards, or creating charts, Copilot helps you analyse faster and with fewer errors.

From conditional formatting to pivot tables and instant visualisations, it's all just a click away. No more guesswork—just clear, fast insights. Try Copilot in Excel today and transform how you work with data.
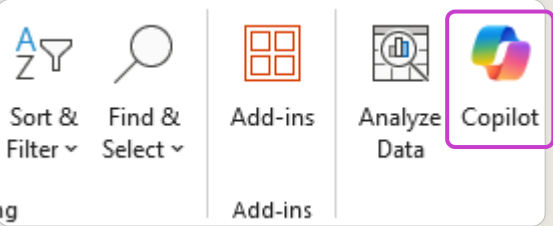
Format Data

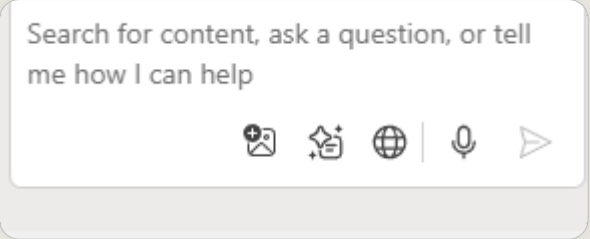Go to Home tab > Format as Table . Choose a style from the dropdown options.
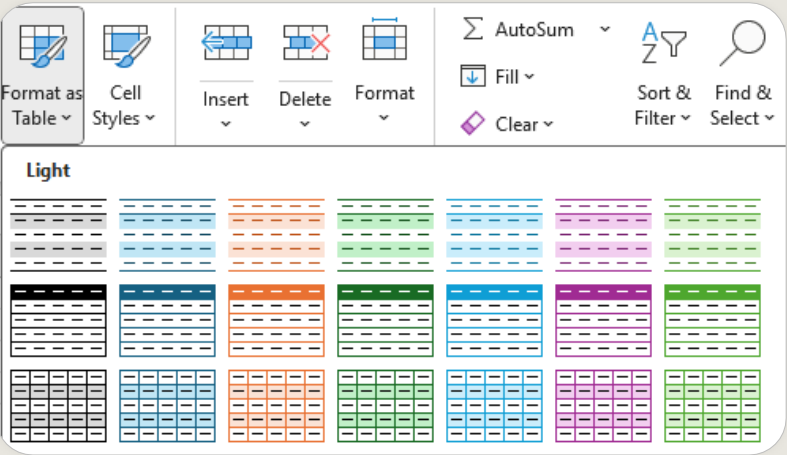
Access Copilot

Click the Copilot button in the top-right corner of the ribbon to open the Copilot .chat panel.

Enter a Prompt

Highlight the relevant data or provide the specific columns, rows or cells when typing your prompt into the Copilot panel.

Use Copilot to add a sum to a column

Ask Copilot to provide totals (Sums) for specific columns, rows or cells, using the following prompt:
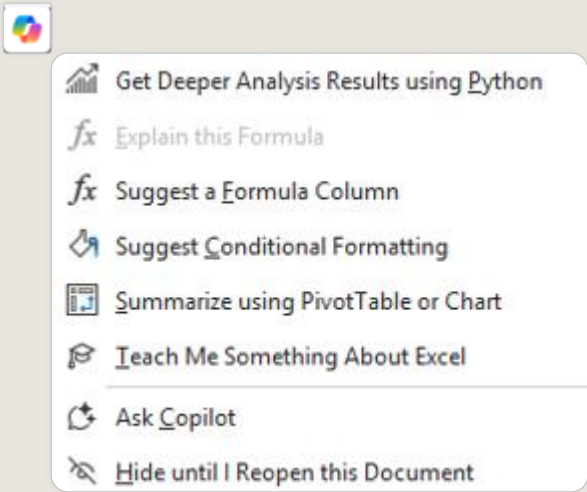
> Provide totals for column B and C

Once Copilot returns its answer, select the option to **"Insert row"**.

[+ Insert row]

[↺ Undo]

Use Copilot Suggested prompts

Highlight your data and select the Copilot icon that appears and view suggested prompts.

Further Copilot prompts to try

- 'Sum the values in columns K and L'
- 'Create a dashboard using the highlighted sales data'

Insert Copilot chart

Once Copilot has analysed the data and creates a chart, use the **"Add to a new sheet"** option just below the suggested chart.

[+ Add to a new sheet]

Remove Copilot chart

Copilot offers convenient buttons to navigate back to your data or remove the inserted chart.

Use the **"Go back to data"** option to navigate back to your data.

Use the **"Undo"** option remove the inserted chart.