



Microsoft

AI in Excel Using ChatGPT & Copilot

Who Should Attend

This course is for Excel users who want to unlock the benefits of AI through ChatGPT & Copilot integration to elevate their Excel skills and output. No prior experience in AI is required, as the course will cover foundational concepts.

Format:

- Full-day instructor-led virtual classroom session

Tools Provided:

- Comprehensive Learning Guide
- Enrolment in our monthly LearningLink e-newsletter

Related Training:

- Microsoft Excel – Intermediate
- Data Visualisation with Excel and PowerPoint

Take Your Spreadsheets to the Next Level

Learn how to realise the potential of Artificial Intelligence (AI) within Excel through topics like prompt engineering, visualisation, macros and more, to enhance your capabilities in financial analysis, reporting, and decision-making

This course will help you:

- Understand key AI concepts and tools like ChatGPT & Copilot that can boost Excel.
- Learn prompt engineering techniques to get the most out of ChatGPT & Copilot.
- Use ChatGPT & Copilot for faster data wrangling, cleaning and formatting.
- Have ChatGPT and Copilot help create complex formulas, macros and visualizations.
- Harness AI to enhance analysis, reporting and decision-making in Excel.



Priority Management Training
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Synopsis:

AI in Excel Using ChatGPT & Copilot

Upon completing this course, you will gain practical skills to integrate the power of ChatGPT & Copilot into Excel to automate repetitive tasks, visualize complex data, develop advanced formulas and models, create macros and custom functions, and unlock more impactful financial analysis.

Prior to the course, all participants should register for a free account on ChatGPT so they can complete the hands-on exercises. Additionally, all participants need to have a Microsoft account for accessing <https://copilot.microsoft.com/>. It's recommended to complete these steps before the course starts.

Artificial Intelligence Fundamentals

- Overview of Artificial Intelligence
- Some examples of working AI tools
 - ChatGPT,
 - MidJourney,
 - Dall-E,
 - Copilot.
- Introduction to ChatGPT & Copilot
- Some Prompt Engineering techniques.

Using ChatGPT and Copilot to accomplish some intermediate and advanced tasks in Excel, such as:

- Generating test data
- Cleaning and formatting the information.
- Performing analysis using Power Query and Power Pivot
- Apply conditional formatting.
- Produce a graph.
- Create complex formulas like VLOOKUP and INDEX / MATCH.
- Generate a reusable user defined function using the LAMBDA function.
- Create a VBA macro.

Data Security Implications

Possible topics for discussion include:

- Best practices for sharing sensitive data sets with ChatGPT & Copilot to prevent exposure
- Additional measures like Excel spreadsheet permissions, encryption and access controls
- How to avoid inadvertently exposing credentials or allowing unauthorized access
- Responsible prompt engineering - formulating requests carefully without revealing private data



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