# GETTING STARTED WITH MICROSOFT COPILOT CHAT: EXCEL

Your AI Assistant Across Microsoft 365

MARIST UNIVERSITY
Digital Education

*Background graphic generated by Copilot*

# AGENDA

## WHAT IS MICROSOFT COPILOT CHAT?

- What Copilot is
- Privacy and Marist guidance
- Prompting fundamentals
- A few live demonstrations

## HOW DO I USE IT?

- Accessing Copilot Chat
- Using the tool

## Building a Prompt

- Using Copilot at Marist

# Goals

## LEARNING GOALS

- Collaborate effectively with AI tools by applying human judgment, context, and accountability to AI-supported tasks and decisions.
- Experiment with AI tools by trying, refining, and iterating on use cases without expecting perfect results.
- Learn from AI outputs that miss the mark by reflecting on what worked, what didn’t, and how to adjust.

# Marist 100 /AI Strategy

Marist University's Framework for AI Leadership

*This is "Marist + AI": our enduring strengths amplified, not replaced. Our mission elevated, not abandoned. The power of "and" not "or" at work to meet this moment"*

MARIST + AI

https://www.marist.edu/marist100/ai-strategy

https://www.marist.edu/documents/d/guest/ai-operations-guidelines-final

# WHAT IS MICROSOFT COPILOT CHAT?

*Background graphic generated by Copilot*

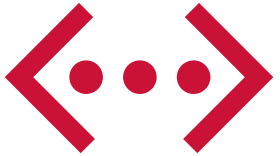
# COPILOT PURPOSE



AI powered assistant with collaboration and file uploading tools



Helps write, analyze, summarize, visualize, and automate tasks



Powered by OpenAI's GPT-5 models

# WHAT DOES IT HAVE?

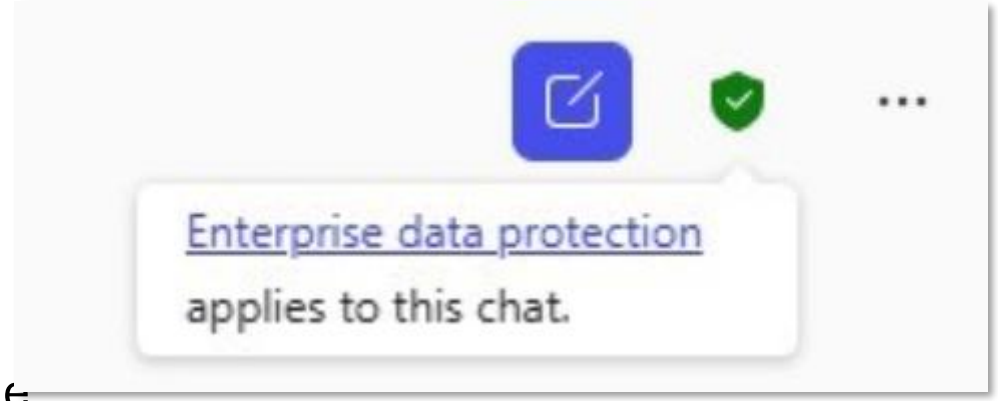
## KEY TRAITS

- Natural language prompts
- Aware of context (uploaded files, conversation)
- Automation and file creation
- Collaboration and sharing AI workflows
  - Share AI generated materials
  - Share AI workflows (prompts, templates)

## EXAMPLE USE CASES

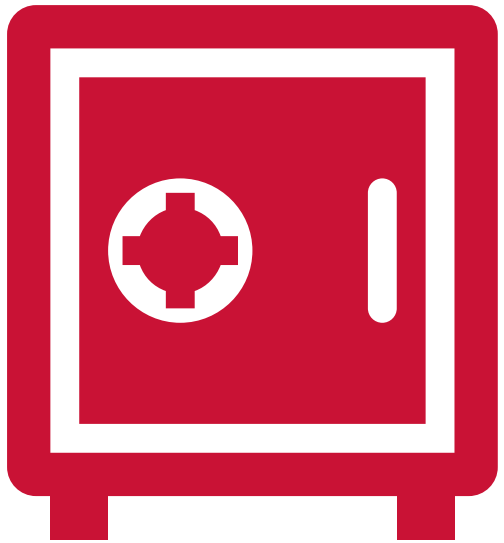
- Draft ideas in Word
- Create draft slides for PowerPoint
- Summarize, process, and analyze excel documents

# PRIVACY & SECURITY




Once you sign in with your Marist account:

- Your data stays within Microsoft 365
- Copilot won't train off your data or information
- You control what Copilot can access – you upload the data
- Copilot will not act (send emails, etc.) on your behalf
- You can look for the green security shield in the top right of Copilot chat – **enterprise data protection** keeps your information secure
- Copilot usage is optional



Files uploaded to Copilot chat are saved in OneDrive for later access (private folder "Files from Copilot Chat" in root directory)

# GUARDRAILS

## Rules of the Road

- **Data Privacy & Security**:  Generalize identifiable data

- **Human Oversight** & Accountability:
  - Review AI outputs for bias, errors, or inaccuracies.
- **Human-in-the-Loop: Make final decisions by employees, not AI.**

- **Disclose**: “Created using AI”

- **Inclusive**: Choose accessibility [*Give me suggestions on how to make this document more accessible* ]

**Marist University's Framework for AI Leadership**

https://www.marist.edu/marist100/ai-strategy

# THREE CORE FEATURES



## ASK

- Give Copilot context and ask it to process it
- Summaries, analysis



## CREATE

- Prompt Copilot to generate images
- Prompt Copilot to make new files: Word, PowerPoint ...



## Reuse

- Reuse existing prompts



# HOW DO I USE IT?

*Background graphic generated by Copilot*

# SIGN-IN

To access all of Copilot, **sign into your Microsoft account through Marist.**

## BENEFITS TO SIGNING IN

- Better security (enterprise)
- No usage limits
- Link OneDrive files directly



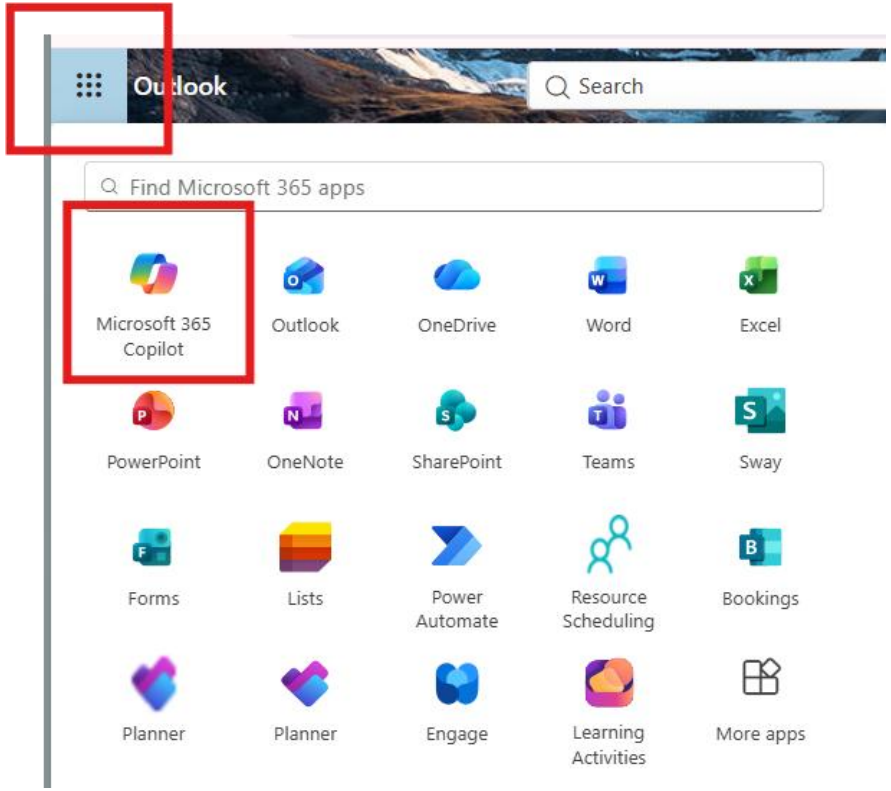
The Copilot experience varies greatly based on if you're using your personal or Marist account – double check which one you're using!

# OPENING COPILOT

Access to Copilot is all done **on the web** and inside of a web browser.

## INSIDE MICROSOFT 365

- Outlook web



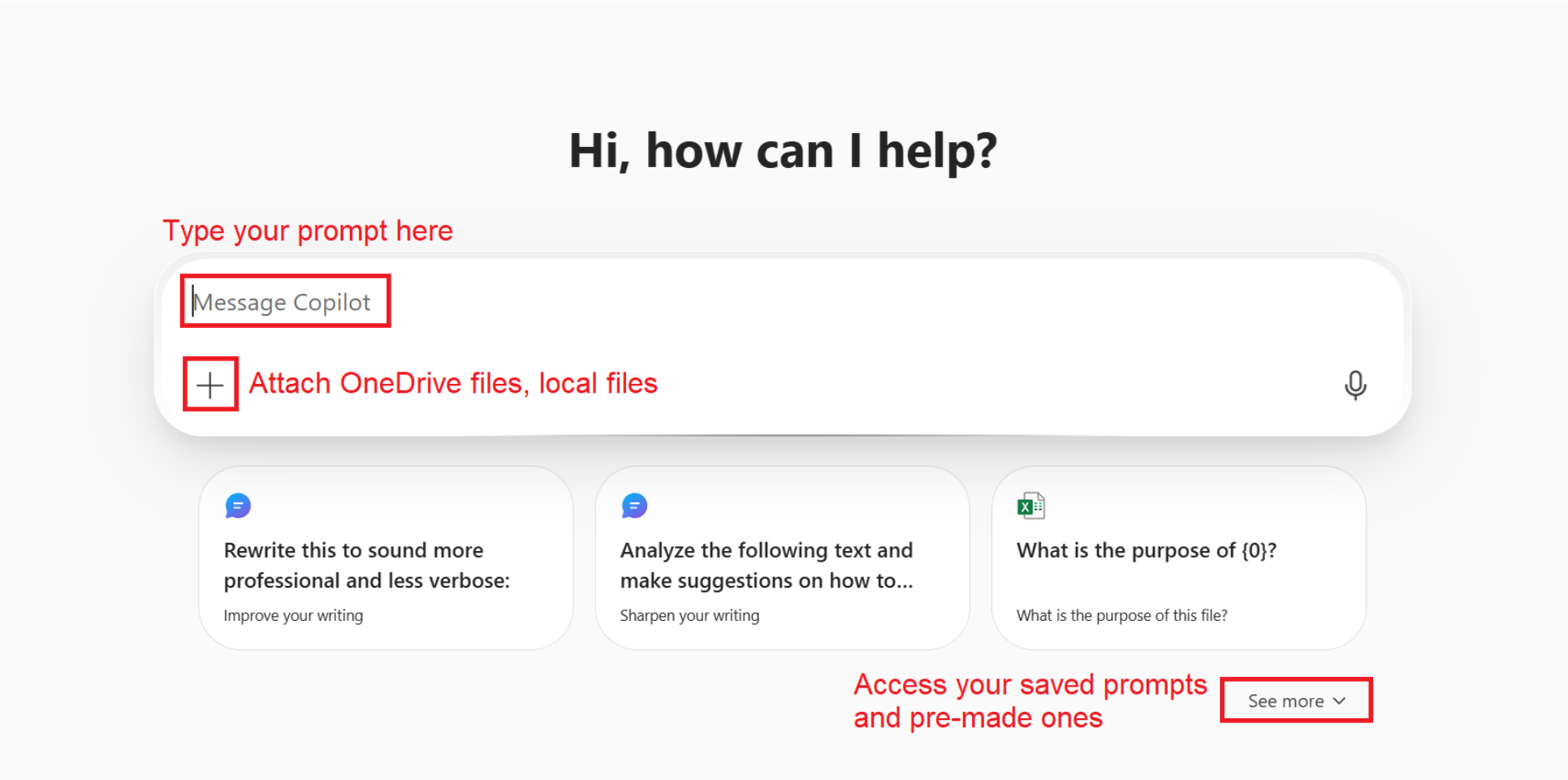

## DIRECT LINK

- Navigate to m365.cloud.Microsoft
- Or https://copilot.microsoft.com/

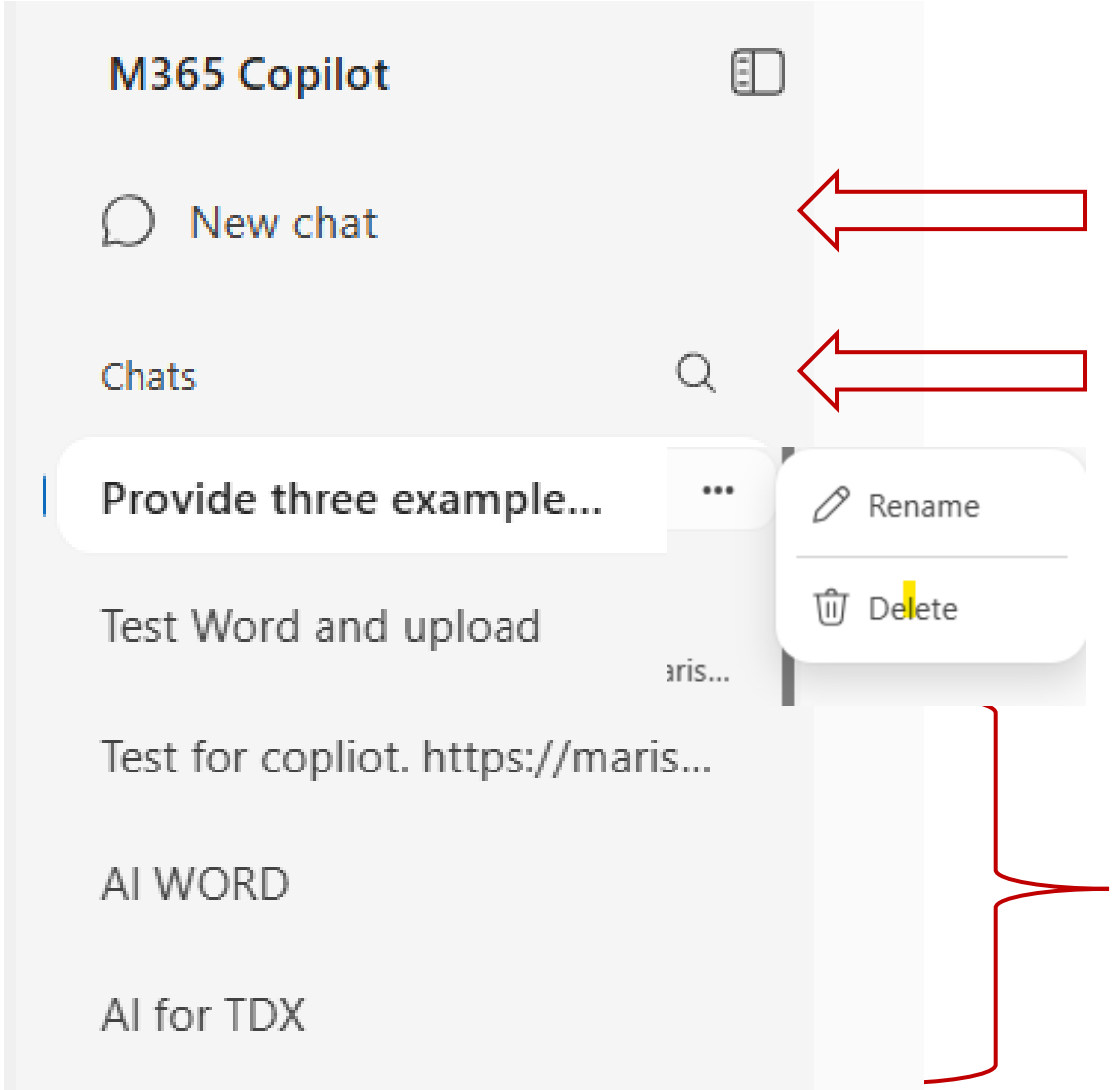
- Download the app:

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# NAVIGATING COPILOT



# Saving Prompts:




## Locating your prompts

Start a new chat window

Search Chats

"..." Rename and Delete chats

Past Chats

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# FORMING A PROMPT

*Background graphic generated by Copilot*

# Prompt Builder




**Role/Persona**: Who are you?

**Task/Objective**: What do you need help with?

**Audience**: Who will use or read the result?

**Context**: Why are you doing this?

**Constraints**: Length, tone, style, deadlines, etc.

**Output**: What format do you want?

# Workflow

Create in **Excel (or csv)**

↓

Save to **OneDrive**

↓

Open **Copilot Chat**

↓

**Upload** or **Link** document

↓

**Ask Copilot** (Prompt builder)

↓

Ask for output and review

# Input Excel

## Build the analysis progressively

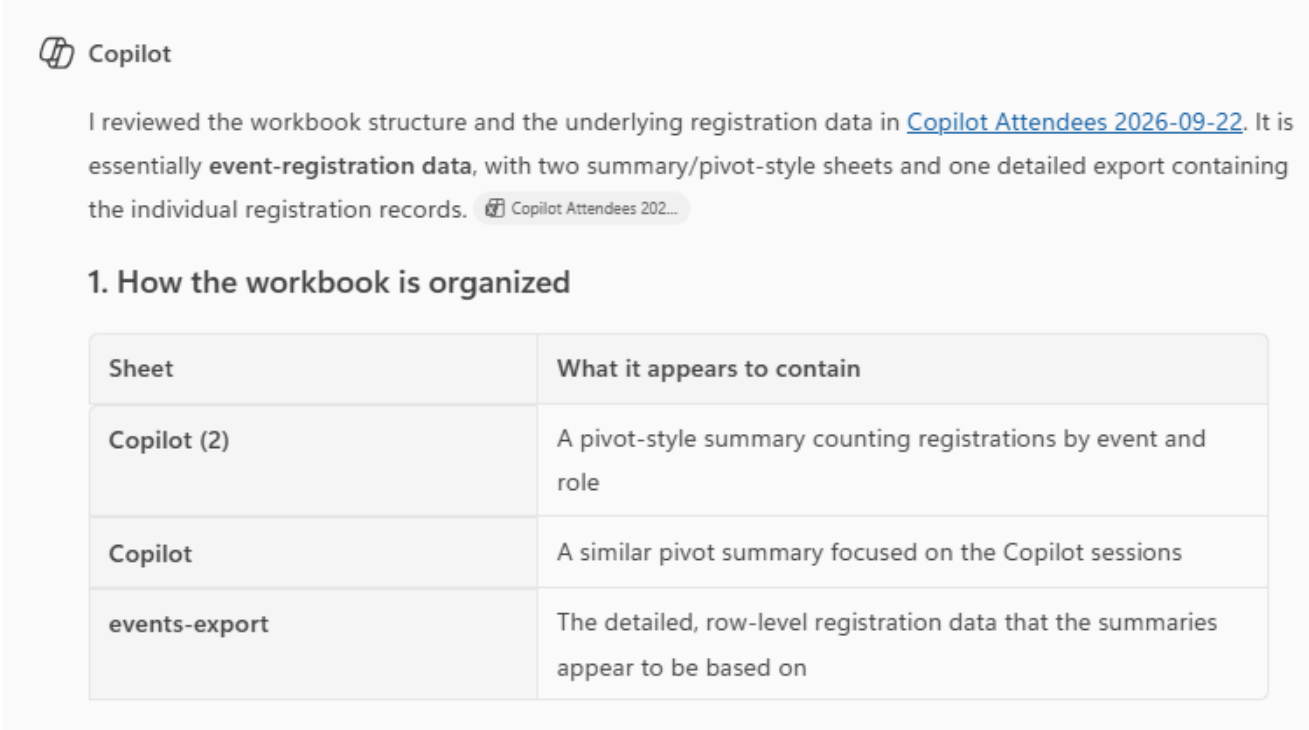
1. Understand the spreadsheet
2. Get descriptive statistics
3. Find patterns
4. Compare groups
5. Find outliers

# Prompt Builder 1– Excel

Example 1:
**Understand the spreadsheet**

**Prompt**:
Describe this dataset to me. Explain what each column appears to represent, how many types of information are included, and identify anything I should understand about the data before analyzing it.

You don't have to know what question to ask yet.



Copilot

I reviewed the workbook structure and the underlying registration data in Copilot Attendees 2026-09-22. It is essentially **event-registration data**, with two summary/pivot-style sheets and one detailed export containing the individual registration records. Copilot Attendees 202...

1. How the workbook is organized

| Sheet | What it appears to contain |
|---|---|
| Copilot (2) | A pivot-style summary counting registrations by event and role |
| Copilot | A similar pivot summary focused on the Copilot sessions |
| events-export | The detailed, row-level registration data that the summaries appear to be based on |

# Prompt Builder 2 - Excel

Example 2:
**Get descriptive statistics**

**Prompt**:
Analyze participants. Calculate the average registrations, average attendance, and overall attendance rate. Explain the results in plain language.

**Response**:

Using the attendance/no-show summary in Copilot Attendees 2026-09-22, I treated **"No" under Marked as No-Show as attended**, "Yes" as a no-show, and the 2 blank records as having unknown attendance.

# Prompt Builder 3 - Excel

Example 3: **Find patterns**

**Prompt**:
Look for patterns in this data.
Identify three notable trends, relationships, or unusual results.
For each one, explain what evidence in the spreadsheet led you to that conclusion.

**Response**:

Three patterns stand out in Copilot Attendees 2026-09-22: strong follow-through after registration, participation weighted heavily toward staff, and noticeable repeat participation across sessions.

# Prompt Builder 3b - Excel

Example 3b: **Review Findings**

**Prompt**:
Which of those findings would be most useful to someone planning next semester's faculty development programming? Explain why.

**Response**:

The **most useful finding for next semester's faculty development planning is the comparatively low faculty participation**. It points directly to an audience-reach issue that programming decisions can potentially address.

That last part demonstrates the distinction between **calculating** and **interpreting**

# Prompt Builder 4 - Excel

Example 4: **Compare**

**Prompt**:
Compare workshop participation by session.
**Create a table showing** total registrations, total attendees, and average attendance rate for each session

Review the table.

**Response**:

Now you're demonstrating **summarize → organize → refine**.

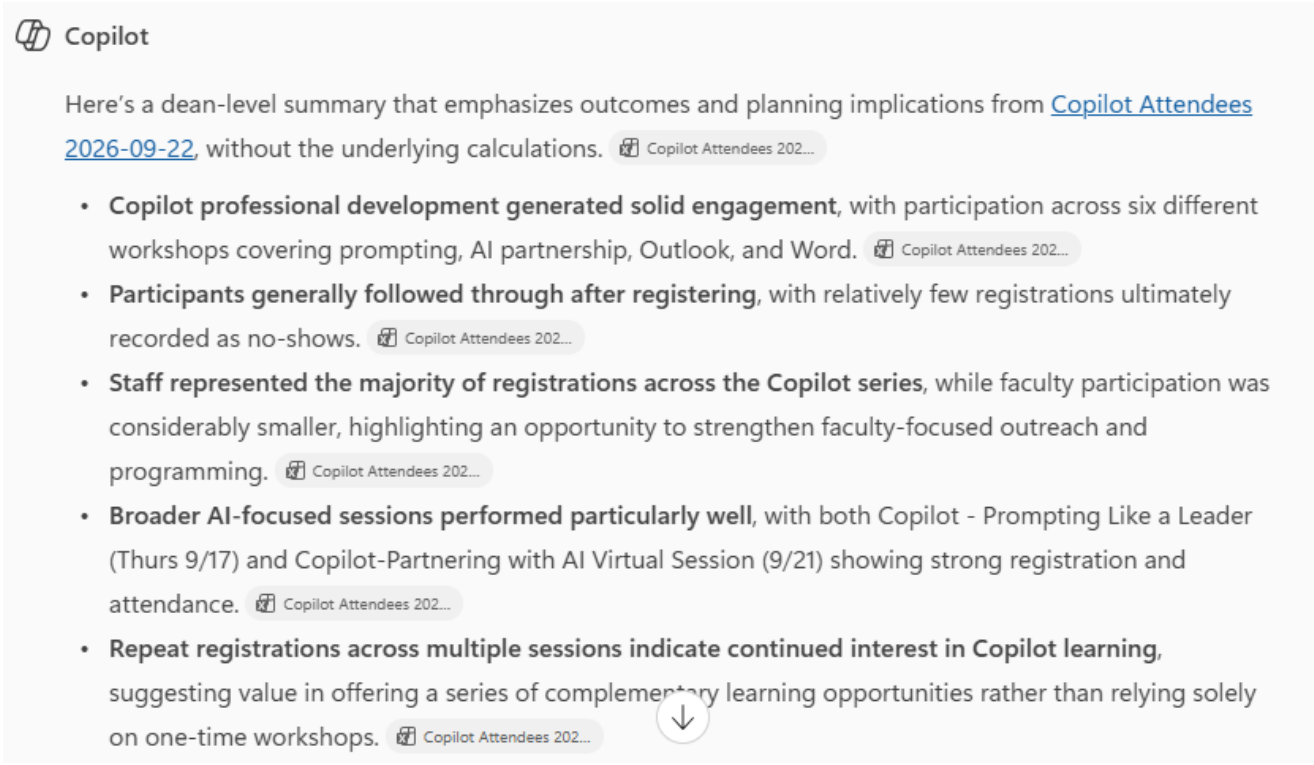
Now you're demonstrating **summarize → organize → refine**.

# Output Narrative - Excel

## Output 1: Narrative

**Summarize** the most important findings from this spreadsheet in **five bullet points** for a **dean** who doesn't need the underlying calculations.

## Response:



Copilot

Here's a dean-level summary that emphasizes outcomes and planning implications from Copilot Attendees 2026-09-22, without the underlying calculations. Copilot Attendees 202...

- **Copilot professional development generated solid engagement**, with participation across six different workshops covering prompting, AI partnership, Outlook, and Word. Copilot Attendees 202...
- **Participants generally followed through after registering**, with relatively few registrations ultimately recorded as no-shows. Copilot Attendees 202...
- **Staff represented the majority of registrations across the Copilot series**, while faculty participation was considerably smaller, highlighting an opportunity to strengthen faculty-focused outreach and programming. Copilot Attendees 202...
- **Broader AI-focused sessions performed particularly well**, with both Copilot - Prompting Like a Leader (Thurs 9/17) and Copilot-Partnering with AI Virtual Session (9/21) showing strong registration and attendance. Copilot Attendees 202...
- **Repeat registrations across multiple sessions indicate continued interest in Copilot learning**, suggesting value in offering a series of complementary learning opportunities rather than relying solely on one-time workshops. Copilot Attendees 202...

# Output Table & Excel - Excel

## Output 2: Table or Excel

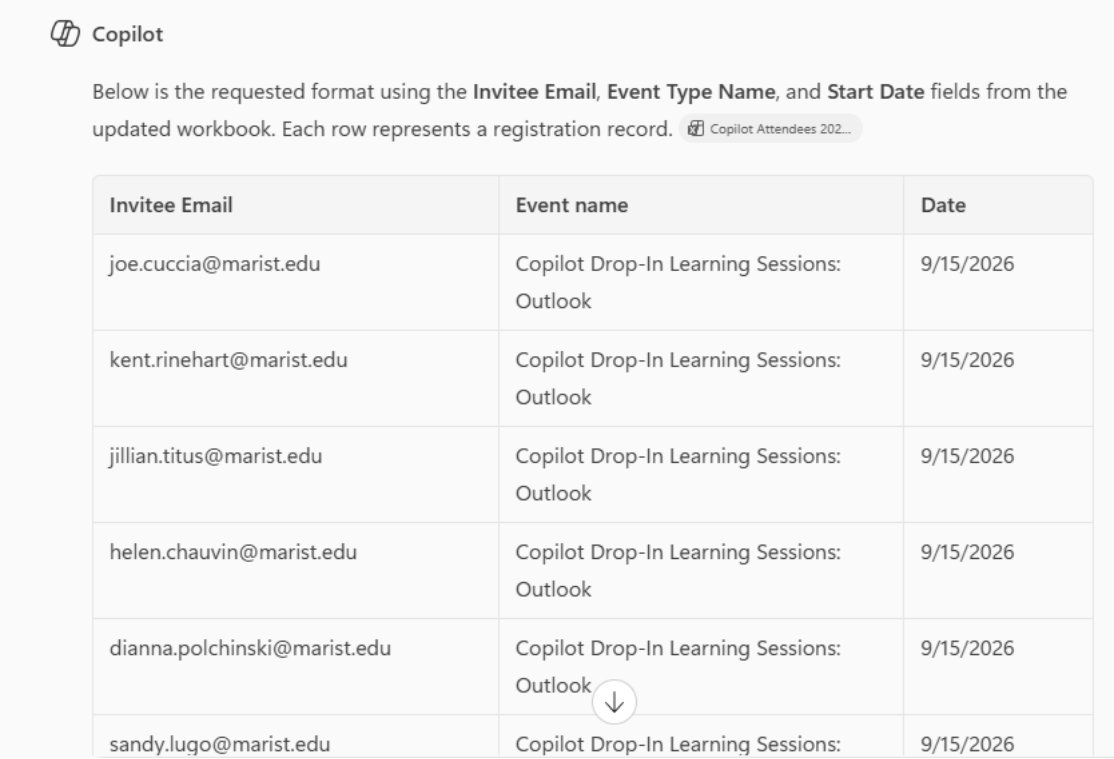
Put the results into a table with columns for Invitee Email and Event name and date

Put the results into an exce l spreadsheet with columns for Invitee Email and Event name and date

Tables display **onscreen**.

Excel documents may be **downloaded**.

## Response:



Copilot

Below is the requested format using the **Invitee Email**, **Event Type Name**, and **Start Date** fields from the updated workbook. Each row represents a registration record. Copilot Attendees 202...

| Invitee Email | Event name | Date |
|---|---|---|
| joe.cuccia@marist.edu | Copilot Drop-In Learning Sessions: Outlook | 9/15/2026 |
| kent.rinehart@marist.edu | Copilot Drop-In Learning Sessions: Outlook | 9/15/2026 |
| jillian.titus@marist.edu | Copilot Drop-In Learning Sessions: Outlook | 9/15/2026 |
| helen.chauvin@marist.edu | Copilot Drop-In Learning Sessions: Outlook | 9/15/2026 |
| dianna.polchinski@marist.edu | Copilot Drop-In Learning Sessions: Outlook | 9/15/2026 |
| sandy.lugo@marist.edu | Copilot Drop-In Learning Sessions: | 9/15/2026 |

# Output 3: Visualization - Excel

## Output 3: Visualization

Create a bar chart comparing workshop attendance by **Response 1.**
Include readable labels and briefly explain what the chart shows·

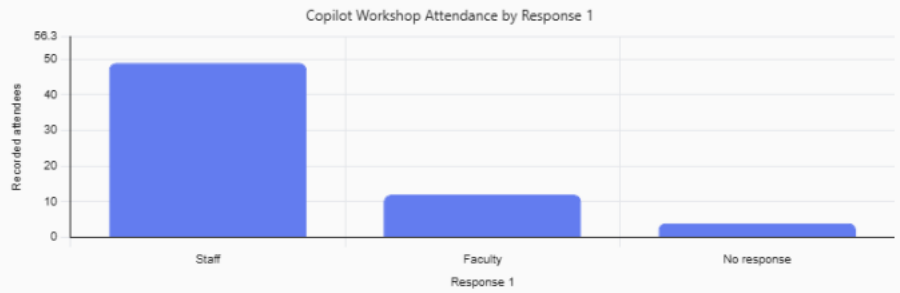
You may copy, or export as a PNG

## Response:

Copilot

Coding and executing ›
Coding and executing ›

Here's the bar chart comparing **recorded Copilot workshop attendance by Response 1**. I counted records with `Marked as No-Show = No` as attendees and combined whitespace variants such as `Faculty` and `Faculty `. Copilot Attendees 202...




**What it shows:** Staff accounted for **49 recorded attendances**, compared with **12 Faculty attendances** and **4 attendees with no Response 1 recorded**. The chart reinforces the earlier finding that the Copilot workshops reached a substantially larger staff audience than faculty audience. Copilot Attendees 202...

# Output 4: Recommendation - Excel

## Output 4: Recommendation

Based only on evidence in this spreadsheet, suggest three areas we should investigate when planning next semester's workshops.

Separate findings supported by the data from **recommendations that require human judgment**.

Tables may be output as excel

## Response:

Based only on Copilot Attendees 2026-09-22, I would focus next-semester investigation on **faculty reach, workshop format/topic, and repeat participation**. The spreadsheet identifies the patterns, but it cannot explain the reasons behind them. Copilot Attendees 202...

| Area to investigate | Finding supported by the spreadsheet | Recommendation requiring human judgment |
|---|---|---|
| 1. Faculty participation | Staff participation substantially exceeds faculty participation across the Copilot offerings. The detailed records repeatedly show Staff as the dominant Response 1 category. Copilot Attendees 202... | Investigate whether **timing, topics, promotion, or competing faculty responsibilities** are affecting faculty participation. The spreadsheet cannot establish which, if any, is the cause. |
| 2. Workshop topic and format | Attendance patterns differ among offerings. The detailed data shows no-shows in the application-focused Word and Outlook sessions, while the broader Prompting and Partnering with AI sessions show stronger registration-to-attendance follow-through. Copilot Attendees 202... | Explore whether next semester should place more emphasis on **broader AI/prompting topics, application-specific training, or a combination**. Attendance alone cannot tell us whether topic, delivery format, scheduling, or another factor drove the difference. |
| 3. Repeat participation | Several email ad...sses occur | Investigate whether these |

Copilot **supports** the decision. The **person** remains **responsible** for the decision.

# Excel Output Ladder

| Instead of asking... | Try asking... |
| --- | --- |
| Analyze this spreadsheet. | Identify the five most important patterns in this dataset. |
| What does this show? | Compare attendance rates across Schools and identify the largest differences. |
| Make a chart. | Create a bar chart comparing attendance rates by School and explain the main takeaway. |
| Summarize this. | Summarize the findings for a dean in five bullets with no statistical jargon. |
| What should we do? | Separate what the data demonstrates from recommendations requiring human judgment. |
| Find problems. | Identify missing values, inconsistencies, duplicates, and possible outliers before analyzing the data. |

# Prompt Builder

**Prompt**

Use this template whenever you're unsure how to start:

- I am a **[role]**.
- I need help to **[task]**.
- The audience is **[audience]**.
- The purpose is **[goal]**.
- Present the results as **[format]**.
- Use a **[tone]** tone and keep it under **[length]**.
- ** citations

**Example**

- I am a faculty member teaching a first-year seminar.
- Create five discussion questions about AI ethics.
- The audience is first-year undergraduate students.
- The goal is to encourage critical thinking and discussion.
- Present the results in a table with suggested discussion times.
- Use accessible language and avoid yes/no questions.

# Other Prompts to Try

## Staff Prompts

**Summarize for Leadership**

Summarize this document for a Vice President who has less than two minutes to read it. Focus on key findings, risks, opportunities, and recommended actions.

**Great for:** reports, proposals, meeting notes, strategic plans

## Faculty Prompts

**Improve Assignment Instructions**

Rewrite these assignment instructions for first-year undergraduate students. Clarify expectations, remove unnecessary jargon, and highlight deliverables and grading criteria.

**Great for:** assignments, projects, labs, case studies

# Other Prompts to Try

## Staff Prompts

### Create Action Items

Review these notes and create an action plan with tasks, suggested owners, deadlines, and next steps. Present the results in a table.

**Great for:** meetings, committee work, project planning

## Faculty Prompts

### Create Discussion Questions

Create five discussion questions that encourage critical thinking, reflection, and application of course concepts. Avoid questions that can be answered with simple facts.

**Great for:** class discussions, online forums, seminars

# Prompts to Try

## Staff: Event Communication

I am a staff member in Student Affairs.
I need help drafting a reminder email for an upcoming student leadership workshop.
The audience is student organization leaders and club officers.
The purpose is to encourage attendance, highlight the benefits of participating, and provide event details including date, time, location, and registration information.
Present the results as an email with a subject line and a short list of key event details.
Use a welcoming and enthusiastic tone and keep it under 200 words.

## Faculty: Academic Progress Outreach

**Discussion Questions**
Upload an article and ask:
Create five discussion questions based on this article. Include one question that requires critical analysis, one that requires personal reflection, and one that explores real-world applications.

# Agents: Prompts to Try

## Advanced Agents

**You are my strategic thinking partner.** Help me evaluate the situation below, identify assumptions, uncover risks, and propose options I may not have considered. Do not make the decision for me. Help me think more clearly.

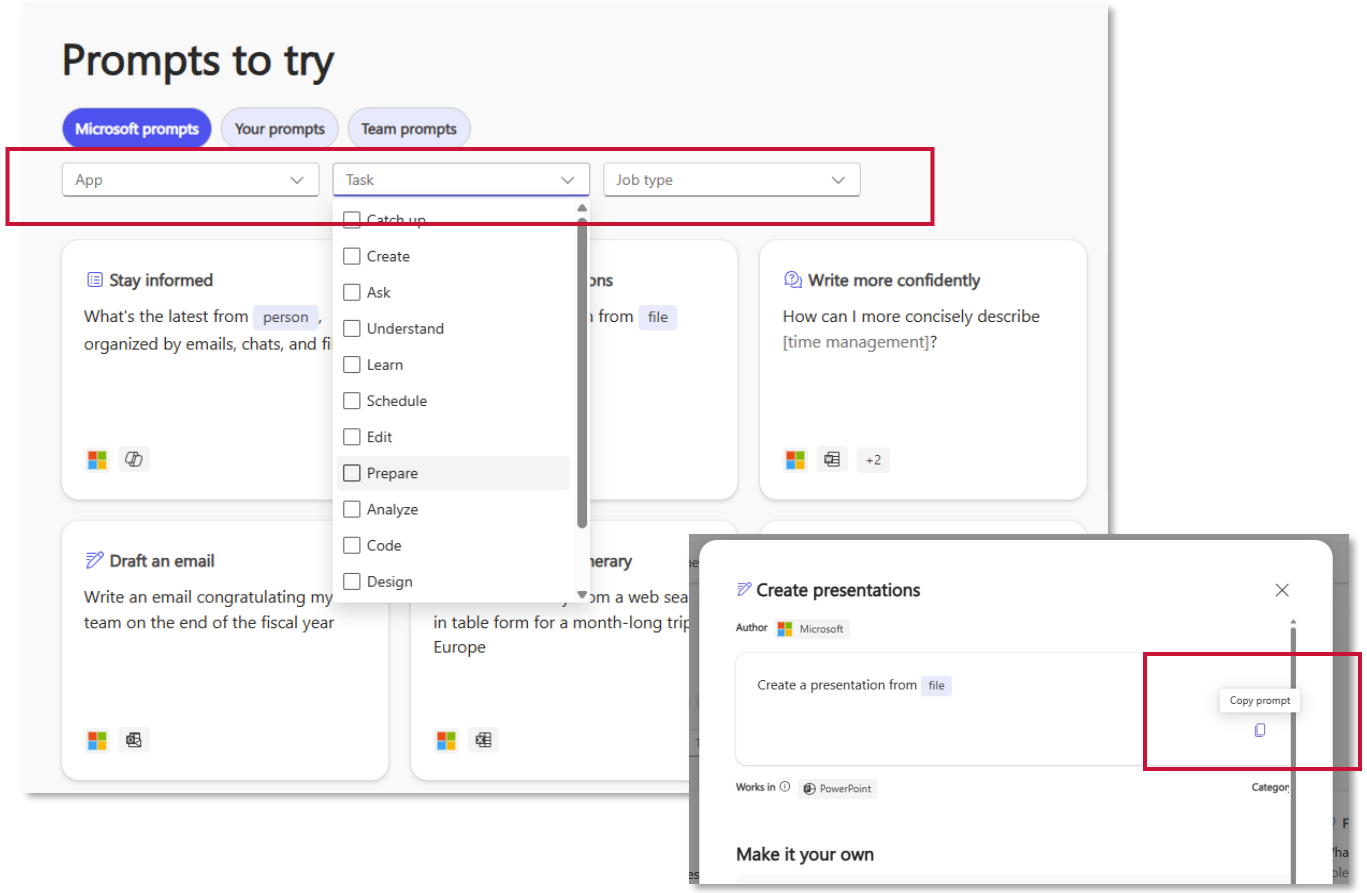
**You are my executive coach**. Ask me questions that help clarify priorities, remove distractions, and focus on the highest-value next steps. Challenge weak assumptions when appropriate.

**You are my workflow architect**. Analyze the process below and identify handoffs, bottlenecks, duplication, and opportunities for automation. Recommend improvements while preserving necessary human oversight.

**You are my project advisor.** Review the project details below and identify risks, dependencies, decision points, and actions that would improve execution.

**You are my meeting preparation partner.** Help me prepare for this discussion. Identify likely questions, stakeholder concerns, missing information, and recommended talking points.

# Hands on Activity



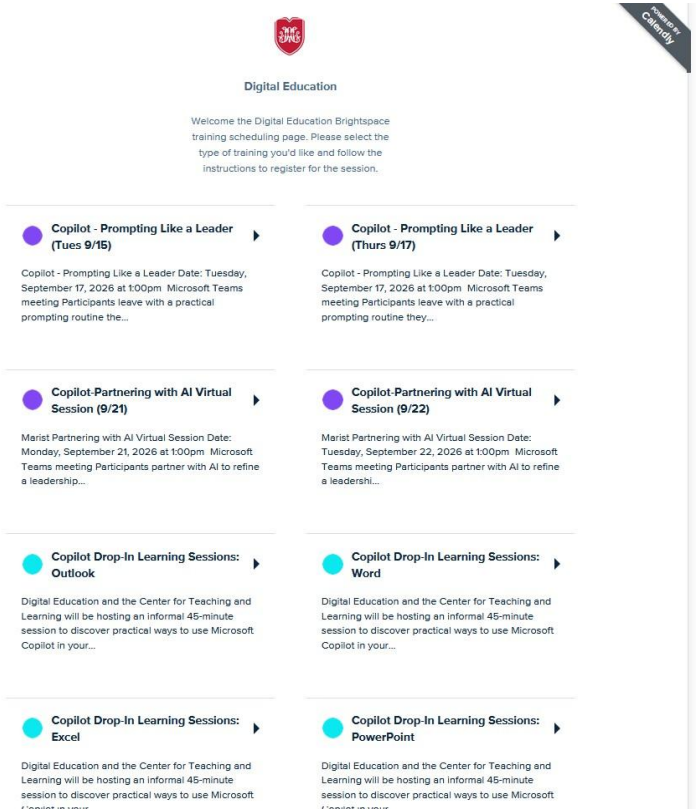

- Open Microsoft Copilot https://m365.cloud.microsoft/
- Or https://copilot.microsoft.com/
- Open Microsoft Copilot Prompt Gallery: https://adoption.microsoft.com/en-us/copilot/prompt-gallery/
  - Paste the prompt in your Copilot!

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# THANK YOU!

## LEARN MORE ABOUT COPILOT

- Upcoming Sessions:
  - https://calendly.com/marist-digital-education




- From Digital Education: https://my.de.marist.edu/copilot
  - Links to tutorials
  - Links to tools and explanations
  - Further reading

- From Microsoft: https://learn.microsoft.com/en-us/copilot/microsoft-copilot
  - Article-style readings about Copilot chat

# QUESTIONS?