STEP-BY-STEP GUIDE · COPILOT IN EXCEL · 20-MINUTE HANDS-ON

Turn Data into Insights with Excel Copilot

One small dataset. Data to information to insight to a one-page report.

0 Set up | 1 P.R.E.P | 2 S.C.A.N | 3 Insights | 4 Report

Before you start

1. Save `Estate_Production_Apr-Sep_2026.xlsx` to your **OneDrive**. Open it in Excel (desktop or web). AutoSave must be on.
2. Click **Home > Copilot**. The Copilot pane opens on the right.
3. Find the **mode menu** under the prompt box. You will switch modes during the exercise.

The three modes

Mode	What Copilot does	Use it when
Chat only	Reads and answers. Never changes the workbook.	You explore, ask, check or challenge
Plan	Shows its steps first. Waits for your OK.	The change is big or touches many cells
Allow editing	Edits the workbook directly. Changed cells light up.	The change is small and clear

NOTE Each prompt shows its mode. Set the mode **before** you send the prompt. Made a mistake? Press **Ctrl + Z**, or click **Stop** while Copilot works.

Also useful

Feature	How
Skills	Type **@** in the prompt box, e.g. `@clean-data`, `@chart-design`. Manage them in **... > Manage plugins & skills**.
Workbook rules	A visible sheet named **.Rules**. Copilot follows it. This file already has one.
Personalization	Your own style for every workbook: **... > Personalization**.

How to read this guide

Box	Meaning
PROMPT	Set the mode shown. Copy and paste.
WHAT COPILOT GIVES YOU	A good answer has these points. Words change. Numbers must be the same.
GATE: YOU DECIDE	Stop, check, decide.
CHECK	What you must see.

Time plan (20 minutes)

Part	Prompts	Minutes
0 Set up	0.1 to 0.3	2
1 P.R.E.P	1.1 to 1.4	7
2 S.C.A.N	2.1 to 2.3	5
3 Insights	3.1	2
4 Report	4.1 to 4.3	4

PART 0 · 2 MIN

Set the context

3 prompts. Tell Copilot who you are, how to work, and what to follow.

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PROMPT 0.1 Chat only — Copilot in Excel

I am an analyst in estate operations. Read the sheets Read_Me and .Rules in this workbook. Follow the rules in .Rules for the full exercise.
In 3 lines, tell me what this data is about. Do not change anything.

WHAT COPILOT GIVES YOU Monthly harvest data for 6 fictional estates, April to September 2026. Copilot confirms the rules: do not change Estate_Data, use tables named tbl_, do not invent missing values.

PROMPT 0.2 Chat only — Copilot in Excel

Act as my thought partner for this analysis.
1. Ask me when something is not clear.
2. Label each point as Known (in the data) or Inferred.
3. Keep answers short. Use tables.
Reply "Ready" if you understand.

PROMPT 0.3 Chat only — Copilot in Excel

My audience is the Head of Estate Operations. They want to know if every estate is ready for the peak crop season. Keep this question in mind in every answer.

CHECK Copilot replies "Ready" and repeats the business question. Nothing in the workbook changed.

PART 1 · 7 MIN

P.R.E.P: make the data trustworthy

Profile, Repair, Evaluate & Enrich, Prove. Data becomes information.

0 Set up | 1 P.R.E.P | 2 S.C.A.N | 3 Insights | 4 Report

P Profile

PROMPT 1.1 Chat only — Copilot in Excel

Profile the sheet Estate_Data. Do not change anything.
1. List the columns, data types and row count.
2. List every data quality issue with the row number.

WHAT COPILOT GIVES YOU

Issue	Where
Estate names spelt differently	Rows 9, 35 (Bukit hijau estate), 29 (BUKIT HIJAU ESTATE), 14 (Sungai Mas Est.)
Numbers stored as text in FFB_Tonnes	Rows 16 (3,566) and 27 (4,084)
Duplicate row	Rows 24 and 25 (Teluk Damai Estate, Jul)
Blank row	Row 22
Missing Rainfall_mm	Row 12 (Lembah Kinta Estate, May)

R Repair

PROMPT 1.2 Plan — Copilot in Excel

Clean the data from Estate_Data into a new sheet named Clean, as an Excel table named tbl_Estate.
1. Use one name for each estate, for example "Bukit Hijau Estate".
2. Convert text numbers to numbers.
3. Remove the duplicate row and the blank row.
4. Keep the missing Rainfall_mm blank and list it for me.
Keep Estate_Data unchanged.

WHAT COPILOT GIVES YOU A plan with these steps: copy the data to a new sheet Clean, fix the 4 estate names, convert 2 text values, remove 1 duplicate and 1 blank row, flag 1 missing rainfall value, format as table tbl_Estate.

GATE 1: YOU DECIDE Read the plan. It must keep Estate_Data unchanged and must not fill the missing rainfall. If a step is wrong, type the change. Then approve the plan.

CHECK Sheet Clean has table tbl_Estate with **36 rows** (6 estates x 6 months). The Estate column has only 6 names.

E Evaluate & Enrich

PROMPT 1.3 Allow editing — Copilot in Excel

In tbl_Estate, add two columns:
Yield_t_ha = FFB_Tonnes / Mature_Hectares, format 0.00
Cost_per_t = Harvest_Cost_RM / FFB_Tonnes, format RM #,##0

CHECK Two new columns light up. Example: Bukit Hijau Estate, Sep: Yield_t_ha **1.24**, Cost_per_t **RM140**.

P Prove

PROMPT 1.4 Chat only — Copilot in Excel

Compare tbl_Estate with the sheet Control_Totals: row count, total FFB_Tonnes and total Harvest_Cost_RM. Show both values in a table and say Match or No match for each.

WHAT COPILOT GIVES YOU

Check	tbl_Estate	Control_Totals	Result
Rows	36	36	Match
FFB_Tonnes	151,961	151,961	Match
Harvest_Cost_RM	17,377,500	17,377,500	Match

GATE 2: YOU DECIDE All three must match. If not, type: `Show me which rows explain the difference.` Fix before you go on. Now the data is **information**.

PART 2 · 5 MIN

S.C.A.N: find the signals

Spikes and drops, Comparison, Anomalies, No change.

0 Set up | 1 P.R.E.P | 2 S.C.A.N | 3 Insights | 4 Report

PROMPT 2.1 Allow editing — Copilot in Excel

From tbl_Estate, make a PivotTable on a new sheet named Scan: Estate in rows, Month in columns (Apr to Sep in order), average of Yield_t_ha in values. Format 0.00. Highlight values below 1.50 in light gold.

WHAT COPILOT GIVES YOU

Estate	Apr	May	Jun	Jul	Aug	Sep
Bukit Hijau Estate	1.66	1.72	1.75	1.71	**1.42**	**1.24**
Ladang Permai Estate	1.58	1.65	1.70	1.87	1.94	2.01
Lembah Kinta Estate	1.68	1.71	1.79	1.88	2.02	2.07
Sungai Mas Estate	1.60	1.72	1.70	1.80	1.94	2.05
Tanjung Sari Estate	1.65	1.73	1.82	1.86	1.91	2.08
Teluk Damai Estate	1.66	1.67	1.79	1.91	1.94	2.11

PROMPT 2.2 Chat only — Copilot in Excel

Apply S.C.A.N to the Scan sheet and tbl_Estate:
S Spikes/Drops, C Comparison, A Anomalies, N No Change.
One line with numbers for each. Label each Known or Inferred.

WHAT COPILOT GIVES YOU **S:** Bukit Hijau yield drops from 1.75 (Jun) to 1.24 (Sep), down 29%. **C:** the other 5 estates rise to 2.01 to 2.11 in Sep. **A:** Bukit Hijau Cost_per_t rises from RM115 (Jul) to RM140 (Sep); the others fall to about RM100. **N:** total FFB still grows every month (23,272 t in Apr to 27,139 t in Sep), so the total hides the problem.

PROMPT 2.3 Chat only — Copilot in Excel

Challenge the Bukit Hijau finding. Could rainfall or a data error explain it? Compare Rainfall_mm and Harvesters with Sungai Mas Estate, which is in the same region. Tell me what the data confirms or rejects.

WHAT COPILOT GIVES YOU Rainfall: rejected. Bukit Hijau had 252 mm in Sep, Sungai Mas 249 mm. Data error: rejected, totals match Control_Totals. Harvesters: Bukit Hijau fell from 225 (Jun) to 158 (Sep), down 30%, almost the same as the yield drop. Fewer harvesters likely left fruit unharvested (Inferred).

GATE 3: YOU DECIDE Check one number yourself: on the Clean sheet, Bukit Hijau Estate, Sep, Harvesters = **158**. In real work, confirm the cause with the estate manager.

PART 3 · 2 MIN

Information to insight

WHAT happened + WHY it matters + WHAT to do.

0 Set up | 1 P.R.E.P | 2 S.C.A.N | 3 Insights | 4 Report

PROMPT 3.1 Chat only — Copilot in Excel

Write 3 insights from this analysis. For each: WHAT happened (with numbers) + WHY it matters + WHAT to do. Then give each insight in one sentence.

WHAT COPILOT GIVES YOU **Insight 1:** Bukit Hijau yield fell 29% from June to September while other estates rose to 2.06 t/ha, losing about 3,500 tonnes of FFB in August and September, so restore harvester numbers before the October peak. **Insight 2:** Harvesters fell by 67 and contract cover pushed cost to RM140 per tonne, so recruit or redeploy harvesters from other estates. **Insight 3:** The other 5 estates are on track, yield up about 26% since April, so the problem is local.

GATE 4: YOU DECIDE Pick the main insight for your report. Model: **Bukit Hijau lost about 3,500 tonnes in peak season because harvesters fell by 67. Restore harvesters before October.**

PART 4 · 4 MIN

Generate the report

A one-page dashboard and management summary.

0 Set up | 1 P.R.E.P | 2 S.C.A.N | 3 Insights | 4 Report

PROMPT 4.1 Plan — Copilot in Excel

Plan a one-page dashboard on a new sheet named Dashboard:
1. A title that states the main insight.
2. Three KPI cards: Total FFB Apr to Sep (t), Bukit Hijau yield in Sep (t/ha), change in Bukit Hijau harvesters Jun to Sep.
3. A line chart of Yield_t_ha by month: Bukit Hijau Estate vs the average of the other 5 estates.
4. Space for a management summary under the chart.

GATE 5: YOU DECIDE Check the plan: one message, three numbers, one chart. Approve it.

PROMPT 4.2 Allow editing — Copilot in Excel

Build the dashboard. Use @chart-design for the chart: Bukit Hijau Estate in green, other estates in grey, no gridlines, no 3D, data labels on the last point only.

CHECK KPI cards: **151,961 t**, **1.24 t/ha**, **-67 harvesters**. The green line drops after July; the grey line rises to about 2.06.

PROMPT 4.3 Allow editing — Copilot in Excel

Under the chart, add a management summary with 5 short lines: Problem, Impact (with numbers), Action, Owner, Due date. Maximum 60 words. Use only facts from this workbook.

WHAT COPILOT GIVES YOU **Problem:** Bukit Hijau yield fell 29% since June. **Impact:** about 3,500 t FFB lost in Aug and Sep; cost RM140/t vs about RM100 elsewhere. **Action:** restore harvesters to 225. **Owner:** Bukit Hijau Estate Manager. **Due:** 15 October 2026.

GATE 6: YOU DECIDE Read every number on the dashboard against the Scan sheet and Control_Totals. Then it is ready to share.

Final check

Check	Yes / No
tbl_Estate has 36 rows and matches Control_Totals.	
Estate_Data is unchanged.	
The missing rainfall was flagged, not filled.	
Every dashboard number matches the Scan sheet.	
The title states an insight. The summary has an action, owner and date.	

Prompt card

Part	Prompts	Mode	Short version
Set up	0.1 to 0.3	Chat only	Read rules. Thought partner. Audience.
P.R.E.P	1.1 to 1.4	Chat, Plan, Edit, Chat	Profile. Repair. Enrich. Prove.
S.C.A.N	2.1 to 2.3	Edit, Chat, Chat	PivotTable. Scan. Challenge.
Insights	3.1	Chat only	What + Why + What to do.
Report	4.1 to 4.3	Plan, Edit, Edit	Plan the dashboard. Build. Summary.

The company, estates and figures are fictional. For training only.