

## Get started with Microsoft 365 Copilot in Excel

Practical examples and how-tos

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# Formulas: Writing, explaining, and asking questions

Create a column that shows the revenue in USD. Look up the exchange rates in the exchange rate to USD column.

Looking at A1:F51, here's 1 formula column to review and insert in Column G:

#### Revenue in USD

Converts the revenue from various currencies to USD by multiplying the revenue by the corresponding exchange rate found in the currency exchange rates table (Table1) based on the currency code.

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=[@Revenue] \* XLOOKUP([@[Currency code]], Table1[Currency Code], Table1[Exchange Rate to USD])

	G
1	Revenue in USD
2	8,304,442.00
3	11,190,935.00
4	13,837,195.00
5	9,560,385.00
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How can I write a formula to forecast revenue over time?

To forecast revenue over time, you can use the FORECAST function or the FORECAST.ETS function in Excel. Here's a high-level approach:

 Collect Historical Data: Ensure you have historical revenue data over time.

 Choose a Forecasting Method: Use either linear forecasting (FORECAST) or exponential smoothing (FORECAST.ETS).

#### Using FORECAST for Linear Forecasting

If you have a linear trend in your data, you can use the FORECAST function.

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=FORECAST(new\_date, Table7[Revenue], Table7[Date])

#### Using FORECAST.ETS for Exponential Smoothing

If your data has seasonality or a non-linear trend, use the FORECAST.ETS function.

=FORECAST.ETS(new\_date, Table7[Revenue], Table7[Date])

Replace new\_date with the date for which you want to forecast the revenue.

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What does this formula do: =[@[Engaged Users]]/[@[Total Users Targeted]]

This formula calculates the engagement rate for each row in a table.

- It divides the value in the "Engaged Users" column by the value in the "Total Users Targeted" column for the current row.
- The result is the proportion of engaged users out of the total users targeted.

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How would I write a formula to split a column with comma separated values into separate columns?

You can use the TEXTSPLIT function to split a column with comma-separated values into separate columns. Here's an example:

Assume you have comma-separated values in cell A1, like "Apple, Banana, Cherry".

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is formula will split the values in cell A1 into se

This formula will split the values in cell A1 into separate columns. If you drag this formula down, it will apply to other cells in column A as well.

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=TEXTSPLIT(A1, ",")

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# Analyze and visualize your data

Summarize the reviews - what are the top 3 opportunities for improvement?

Here's a summary of column 'Customer reviews':

- Positive Feedback on Charger Performance: Many users praised the charger for its reliability, efficiency, and quick charging times. It has been a valuable addition to various fleets, including rental cars, delivery vans, and mobile repair vans. Users appreciate its ease of use and the positive impact on their business operations.
- Mixed Reviews on Customer Support: While some users reported excellent customer support, others experienced poor service. Issues included unresponsive support teams and inadequate assistance with technical problems. This inconsistency in customer support has been a significant concern for some users.
- Installation Challenges: Several users mentioned difficulties with the installation process. Some had to call in technicians for assistance, while others found the process time-consuming and complicated. These challenges have led to frustration and additional costs for some users.
- Opportunities for Improvement: 1. Enhance Customer Support: Address the inconsistency in customer support by providing timely and effective assistance to all users. 2. Simplify Installation Process: Make the installation process more user-friendly and provide clear instructions to reduce the need for technical assistance. 3. Improve Charger Reliability: Address issues related to the charger stopping randomly, overheating, and slow charging times to ensure a more consistent and reliable performance.

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#### Create a chart showing revenue by guarter and year

I analyzed data in A2:N14, and here's what I found:

#### Sum of Revenue (Thousands)



Here's a PivotChart based on your prompt. The revenue by guarter and year is as follows:

- 2021: Q1: \$6,980, Q3: \$22,018, Q4: \$4,540
- 2022: Q2: \$4,732
- 2023: Q3: \$21,507, Q4: \$10,857
- 2024: O1: \$8,703

See the PivotChart above for more details.

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Add coloring to show each campaign type in a different color

OK! Looking at A1:K13, here are 3 conditional formatting rules to review and apply:

- Text contains "Brand marketing": Apply the following to cells in the column "Campaign Type"
  - Fill color: green
  - Font color: black

AaBbCc

- Text contains "Digital marketing": Apply the following to cells in the column "Campaign Type"
  - Fill color: red
  - Font color: black

AaBbCc

- Text contains "Targeted Group 2": Apply the following to cells in the column "Campaign Type"
  - Fill color: blue

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Font color: black

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## **Getting started**

### Autosave on

The file must be saved to OneDrive or SharePoint, with Autosave turned on.



### "Table-less" Copilot

Copilot works with data that's either in an Excel Table (Insert | Table) format, or in a "Table-Like Range" with column headers.

	Α	В	С	D	
1	Employee ID	Email Address	First name	Last name	
2	7192	Juan.Tepaz@contoso.com	Juan	Tepaz	
3	4840	Chetana.Hegde@contoso.com	Chetana	Hegde	
4	1564	Swarnika.Soni@contoso.com	Swarnika	Soni	
5	6619	Carmen.Vella@contoso.com	Carmen	Vella	
6	7463	Akhilesh.Khare@contoso.com	Akhilesh	Khare	
7	2734	Sigríður.Einarsdóttir@contoso.com	Sigríður	Einarsdóttir	
8	8476	Rohini.Vasav@contoso.com	Rohini	Vasav	
9	4987	Neha.Benjaree@contoso.com	Neha	Benjaree	
10	6307	Jahidi.Juma@contoso.com	Jahidi	Juma	
11	6356	Sonu.Jain@contoso.com	Sonu	Jain	
12	1527	Sanjay.Puranik@contoso.com	Sanjay	Puranik	
13	6161	Shweta.Chourasia@contoso.com	Shweta	Chourasia	

### Open the chat pane

Click on the Copilot button on the ribbon and try one of the starting prompts or write your own.

0	Copilot ~	×
	Create formulas Suggest a formula column	
	Q Understand Summarize using PivotTables or charts	
	Advanced analysis Get deeper analysis results using Python	
	Apply color and formatting Highlight all cells with [incomplete in red]	

### Ask Copilot

How do I sum values based on [criteria]

# **Tip: Use multi-turn**

- 1.Use multi-turn to add clarification or request changes.
- 2.If you don't get what you want the first time, try saying "actually can you do XYZ instead" – that helps the model learn what you want.
- 3.Note that previous prompts/responses have informed Copilot's latest response – create a new chat thread to start fresh.



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# Tip: Ask "why" and "how" questions

- 1.Try asking Copilot *why* something isn't working or *how* to do the task in Excel, instead of asking it to do it for you.
- 2.If Copilot doesn't seem to understand what you want, try rephrasing your prompt with different words.

## Why isn't the Date column sorting to show dates in the right order?

The issue might be due to the date format in the "Date of transaction" column. Ensure that the dates are recognized as date values by Excel. Here are the steps to check and correct this:

#### 1. Select the Date Column:

• Click on the header of the "Date of transaction" column to select the entire column.

#### 2. Check the Format:

- Go to the "Home" tab on the ribbon.
- In the "Number" group, check the format dropdown. It should be set to "Date."

#### 3. Convert Text to Date (if necessary):

- If the dates are not recognized correctly, you can use the DATEVALUE function to convert them.
- Insert a new column next to the "Date of transaction" column.
- Use the following formula to convert the text to date values:

### =DATEVALUE([@[Date of transaction]])

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- Copy the formula down the entire column.
- Copy the new column and paste it as values over the original "Date of transaction" column.
- Delete the temporary column.

#### 4. Sort the Column:

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- Select the "Date of transaction" column again.
- Go to the "Data" tab on the ribbon.
- Click on "Sort Oldest to Newest" or "Sort Newest to Oldest."

This should ensure that the dates are sorted correctly.

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How would I write a formula to bring in the revenue in USD from the Revenue worksheet?

To bring in the revenue in USD from the "Revenue" worksheet, you can use the VLOOKUP function. Assuming the "Revenue" worksheet has columns "Currency code" and "Revenue in USD", you can use the following formula:

#### fx

=VLOOKUP([@[Currency code]], Revenue!A:B, 2, FALSE)

This formula looks up the "Currency code" in the "Revenue" worksheet and returns the corresponding "Revenue in USD". Make sure to adjust the column references if they are different in your "Revenue" worksheet.

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Please use the thumbs up and down to let us know your experience!

The Excel team spends a *lot* of time reviewing these – and include a screenshot if possible, that context is very helpful.

# Working with text

## Summarize a column of text

- **Source**: Any dataset with a text-heavy column, such as survey verbatims.
- **Prompt 1**: Summarize <column> to show the top 3 opportunities for improvement.

	Α	В	С	
1	Survey date 🖂	Department 🖂	Verbatims/comments from HR onboarding survey	
2	08/07/2024	Marketing	The onboarding process was smooth and well-organized. I felt like I was part of the team from day one.	
3	08/10/2024	Sales	I felt welcomed and supported by my new team. Everyone was so friendly and helpful.	
4	08/16/2024	Legal	The training sessions were informative and helpful. I learned a lot about the company and my role.	
5	08/08/2024	Marketing	I appreciate the company's commitment to diversity and inclusion. It's great to see such a diverse workforce.	
6	08/08/2024	Engineering	The HR team was very responsive to my questions and concerns. They made the transition to the new company seamless.	
7	08/07/2024	Marketing	I am excited about the opportunities for growth and development here. I can't wait to see what the future holds.	
8	08/14/2024	Legal	The company culture is positive and collaborative. I feel like I can really make a difference here.	
9	08/10/2024	Legal	I felt well-prepared for my role after the orientation. The onboarding materials were clear and easy to understand.	
10	08/12/2024	Legal	The benefits package is comprehensive and competitive. I appreciate the emphasis on work-life balance.	
11	08/17/2024	Sales	I am impressed with the company's commitment to sustainability. It's great to see a company that cares about the environment.	
12	08/14/2024	Marketing	The work environment is friendly and professional. I feel like I can really thrive here.	
13	08/10/2024	Support	I appreciate the flexibility in work hours and remote work options. It's great to have that kind of flexibility.	
14	08/16/2024	Engineering	The company's mission and values align with my own. I feel like I am part of something bigger.	
15	08/12/2024	Marketing	I felt valued and respected from day one. The team-building activities helped me get to know my colleagues.	
16	08/11/2024	Support	The onboarding materials were clear and easy to understand. I felt well-prepared for my first day on the job.	
17	08/12/2024	Administration	I am looking forward to contributing to the company's success. I feel like I can really make a difference here.	
18	08/11/2024	Support	The HR team made the transition to the new company seamless. They were very helpful in answering my benefits questions.	
19	08/15/2024	Sales	I appreciate the emphasis on work-life balance. It's great to have that kind of flexibility.	
20	08/16/2024	Administration	The company's technology and tools are up-to-date and efficient. I feel like I can really thrive here.	
21	08/07/2024	Support	I felt well-informed about the company's policies and procedures. The communication channels are open and transparent.	
22	08/11/2024	Engineering	The team-building activities helped me get to know my colleagues. I feel like I am part of a great team.	
23	08/17/2024	Marketing	I am excited about the company's future and my role in it. I can't wait to see what the future holds.	
24	08/09/2024	Administration	The HR team was very helpful in answering my benefits questions. They made the transition to the new company seamless.	
25	08/17/2024	Legal	I felt supported during the onboarding process. The training sessions were informative and helpful.	
26	08/13/2024	Administration	The company's communication channels are open and transparent. I feel well-informed about the company's policies and procedures.	
27	08/15/2024	Support	I appreciate the opportunities for professional development. I feel like I can really grow here.	

Summarize the verbatims to show the top 3 opportunities for improvement

Here's a summary of column 'Verbatims/comments from HR onboarding survey':

- Clear and Relevant Onboarding Materials: Several comments highlighted the need for updated and role-specific onboarding materials. Outdated or generic information left new employees feeling lost and unsupported.
- Structured and Well-Paced Onboarding Process: Feedback indicated that the onboarding process was often disorganized, rushed, or too packed. A more structured and manageable onboarding schedule would help new employees absorb information better.
- Comprehensive Information on Company Policies and Procedures: Many new employees felt they did not receive enough information about the company's policies, procedures, and future plans. Providing a comprehensive overview would help them feel more informed and prepared.

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# Extract <labels> from a text column into a new column

- **Source**: Any dataset with a column that contains text you want to extract to new columns.
- **Prompt**: Add a column that extracts the text between the first set of brackets in <column>.

	A	В		Add a column that e	xtracts the text between the first se
1	Science class list	Extracted Text 🛛 🗹		of brackets in <colur< td=""><td>nn&gt;</td></colur<>	nn>
2	1. [Physics] [Friday] Quantum Mechanics and the Fabric of Space-Time	Physics			
3	2. [Biology] [Wednesday] Evolutionary Dynamics and Genetic Diversity	Biology	Look	king at A1:A21, here's 1 formula	column to review and insert in
4	3. [Chemistry] [Wednesday] The Periodic Table: Elements and Their Interactions	Chemistry	Colu	imn B:	
5	4. [Environmental Science] [Wednesday] Conservation Biology and Sustainable Development	Environmental Science	Class	s Name	
6	5. [Astronomy] [Friday] Stars, Galaxies, and the Structure of the Universe	Astronomy	Extra	acts the name of each science d	ass by isolating the text between
7	6. [Geology] [Thursday] Plate Tectonics and the Earth's Interior	Geology	the f	first set of square brackets in ea	ch entry.
8	7. [Psychology] [Wednesday] The Human Mind: An Introduction to Neuropsychology	Psychology	fx		Ο
9	8. [Mathematics] [Monday] Differential Equations in Natural Sciences	Mathematics			
10	9. [Computer Science] [Monday] Data Structures in Scientific Computing	Computer Science	=T	EXTBEFORE(TEXTAFTER([@[Sc	ience class list]],"
11	10. [Biochemistry] [Friday] Metabolic Pathways and Cellular Energy	Biochemistry	L	), ])	
12	11. [Physics] [Monday] Classical Mechanics and Relativity	Physics			Show explanation $$
13	12. [Biology] [Thursday] Microbial Worlds: An Exploration of Microorganisms	Biology			В
14	13. [Chemistry] [Tuesday] Chemical Bonding and Molecular Structure	Chemistry	1	Class Name	
15	14. [Environmental Science] [Wednesday] Climate Change: Causes, Effects, and Solutions	Environmental Science	2	Physics	
16	15. [Astronomy] [Thursday] Observational Astrophysics and Cosmic Phenomena	Astronomy	3	Biology	
17	16. [Geology] [Wednesday] Mineralogy and Crystallography	Geology	5	Environmental Science	
18	17. [Psychology] [Friday] Behavioral Neuroscience and Cognition	Psychology			
19	18. [Mathematics] [Wednesday] Statistics for Life Sciences	Mathematics	+	Insert column	
20	19. [Computer Science] [Thursday] Machine Learning Applications in Biology	Computer Science		more column	A 0
21	20. [Biochemistry] [Friday] Structural Biology and Enzyme Mechanisms	Biochemistry	AI-ge	enerated content may be incorrect	07
20					

## Split text into two columns

- Source: Any dataset with a column that contains text you want to extract to a new column. Add more details to the prompt as needed for the complexity of the data.
- **Prompt**: Add a new column that pulls the country out of the location. Most of the time the country is the value after the last comma, but if the value after the last comma is two capital letters, then set the country to USA.

	A	В	C
1	Date	Location	Country
2	1/5/2023	New York, NY	USA
3	6/29/2024	Vancouver, British Columbia, Canada	Canada
4	11/30/2023	Houston, TX	USA
5	1/18/2024	London, United Kingdom	United Kingdom
6	8/9/2024	Singapore	Singapore
7	1/27/2024	Cape Town, South Africa	South Africa
8	7/20/2023	Paris, France	France
9	6/17/2023	Tokyo, Japan	Japan
10	8/2/2024	Sydney, Australia	Australia
11	4/15/2023	Berlin, Germany	Germany
12	3/10/2023	Los Angeles, CA	USA
13	12/14/2023	Toronto, Ontario, Canada	Canada
14	6/16/2023	Vancouver, British Columbia, Canada	Canada
15	4/6/2023	Madrid, Spain	Spain
16	8/19/2023	Rome, Italy	Italy
17	2/24/2023	Cape Town, South Africa	South Africa
18	12/14/2023	Buenos Aires, Argentina	Argentina
19	6/27/2024	Moscow, Russia	Russia
20	3/23/2023	Beijing, China	China
21	5/18/2024	Mumbai, India	India
22	3/10/2023	São Paulo, Brazil	Brazil
23	4/19/2024	Mexico City, Mexico	Mexico

Add a new column that pulls the country out of the location. Most of the time the country is the value after the last comma, but if the value after the last comma is two capital letters then set the country to USA.

Looking at A1:B155, here's 1 formula column to review and insert in Column C:

#### Country

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Identifies the country of each concert location by checking if the last part of the location string is a two-letter state abbreviation. If it is, it assigns "USA"; otherwise, it extracts the country name from the location.

=IF(LEN(TRIM(RIGHT(SUBSTITUTE(\$B2,",",REPT(" ",LEN(\$B2))),LEN(\$B2))))=2,"USA",TRIM(RIGHT(SUBSTITUTE (\$B2,",",REPT(" ",LEN(\$B2))),LEN(\$B2))))

	C
1	Country
2	USA
3	Ireland
4	United Kingdom
5	Singapore
+	Insert column

## Separate delimited text into separate yes/no columns

- Source: Any dataset works, have a column with text in it with separators like semicolons (;) in the values.
- **Prompt**: Create new Yes/No columns for any additional values in <ColumnName> as indicated by the semicolon (;) separator.

Name	Attending review?	Last status update	Number of sales leads	Territories covered	US	APAC	EMEA
Juan Tepaz	Yes	02/01/2024	5	US; EMEA	Yes	No	Yes
Chetana Hegde	Maybe	02/02/2024	4	APAC	No	Yes	No
Swarnika Soni	Yes	02/14/2024	5	US;APAC	Yes	Yes	No
Carmen Vella	No	02/20/2024	5	US	Yes	No	No
Akhilesh Khare	No	02/16/2024	2	EMEA	No	No	Yes
Sigríður Einarsdóttir	Yes	02/08/2024	2		No	No	No
Rohini Vasav	Maybe	02/11/2024		US; EMEA	Yes	No	Yes
Neha Benjaree	Yes	02/17/2024	1	US	Yes	No	No
Jahidi Juma	Yes	02/10/2024	1	US	Yes	No	No
Sonu Jain	No	02/07/2024	2		No	No	No
Sanjay Puranik	Maybe	02/15/2024	4	US	Yes	No	No
Shweta Chourasia	Yes	02/09/2024		US	Yes	No	No
Francisco Tulul		02/15/2024	1	US	Yes	No	No
Isabel Velásquez	No	02/28/2024	5	US; EMEA; APAC	Yes	Yes	Yes
Preeti Rajdan	Yes	02/16/2024	5		No	No	No
Moni Sisodiya	No	02/26/2024	4	US; EMEA	Yes	No	Yes
Darshan Srivastava	No	02/21/2024	2		No	No	No
Reena Shrivastav	Yes	02/19/2024	1	US	Yes	No	No
Henry Ross	Maybe	02/13/2024	5	US; EMEA	Yes	No	Yes
Devon Torres	Maybe	02/15/2024	3	US	Yes	No	No
Madison Kim	Maybe	02/05/2024	3		No	No	No
Hannah Jarvis	Yes	02/28/2024	1		No	No	No
Ellis Turner	Yes	02/07/2024	2	US; EMEA	Yes	No	Yes
Shawn Hughes	Yes	02/26/2024	2	US; EMEA	Yes	No	Yes
Andre Lawson	No	02/21/2024	5	US; EMEA	Yes	No	Yes
Rowan Murphy	No	02/04/2024		US; EMEA	Yes	No	Yes
Malik Barden	Maybe	02/01/2024	3	US; EMEA; APAC	Yes	Yes	Yes
Ashley Schroeder	No	02/02/2024	2	US	Yes	No	No

### covered as indicated by the ; separator Looking at A44:E81, here are 3 formula columns to review and insert in Columns F, G, and H: 1. US Identifies whether each person covers the US territory by checking if "US" is listed in their territories covered and marking "Yes" or "No" accordingly. =IF(ISNUMBER(SEARCH("US", \$E45)), "Yes", "No") Show explanation ∨ 2. APAC

Create new Yes/No columns for any additional values in Territories

Identifies whether each individual covers the APAC territory by checking if "APAC" is mentioned in their list of territories and marking it as "Yes" or "No"

=IF(ISNUMBER(SEARCH("APAC", \$E45)),"Yes","No")

Show explanation ∨

#### 3. EMEA

fx

fx

Identifies whether each person covers the EMEA region by checking if "EMEA" is listed in their territories and marking "Yes" or "No" accordingly.

			Show explanation
			•
	F	G	Н
44	US	APAC	EMEA
45	Yes	No	Yes
46	No	Yes	No
47	Yes	Yes	No
48	Yes	No	No

## More formula use cases

## Change a list of full names from "Last, First" to "First Last"

- **Source**: Any dataset with a list of names in "Last, First" format. •
- **Prompt**: Create a new column that shows people's first names, then a space, then their last names. ٠

	A	В	C	D
1	Employee ID	Employee Name	Full Name	First Last Name
2	5444	Tepaz, Juan	Juan Tepaz	Juan Tepaz
3	5972	Hegde, Chetana	Chetana Hegde	Chetana Hegde
4	9945	Soni, Swarnika	Swarnika Soni	Swarnika Soni
5	5198	Vella, Carmen	Carmen Vella	Carmen Vella
6	9180	Khare, Akhilesh	Akhilesh Khare	Akhilesh Khare
7	6711	Einarsdóttir, Sigríður	Sigríður Einarsdóttir	Sigríður Einarsdóttir
8	1935	Vasav, Rohini	Rohini Vasav	Rohini Vasav
9	3197	Benjaree, Neha	Neha Benjaree	Neha Benjaree
10	8588	Juma, Jahidi	Jahidi Juma	Jahidi Juma
11	1524	Jain, Sonu	Sonu Jain	Sonu Jain
12	2012	Puranik, Sanjay	Sanjay Puranik	Sanjay Puranik
13	3059	Chourasia, Shweta	Shweta Chourasia	Shweta Chourasia
14	7221	Tulul, Francisco	Francisco Tulul	Francisco Tulul
15	5465	Velásquez, Isabel	Isabel Velásquez	Isabel Velásquez
16	7440	Rajdan, Preeti	Preeti Rajdan	Preeti Rajdan
17	5614	Sisodiya, Moni	Moni Sisodiya	Moni Sisodiya
18	6565	Srivastava, Darshan	Darshan Srivastava	Darshan Srivastava
19	2826	Shrivastav, Reena	Reena Shrivastav	Reena Shrivastav
20	5792	Ross, Henry	Henry Ross	Henry Ross
21	1205	Torres, Devon	Devon Torres	Devon Torres
22	7063	Kim, Madison	Madison Kim	Madison Kim
23	5968	Jarvis, Hannah	Hannah Jarvis	Hannah Jarvis
24	9287	Turner, Ellis	Ellis Turner	Ellis Turner
25	8644	Hughes, Shawn	Shawn Hughes	Shawn Hughes
26	1088	Lawson, Andre	Andre Lawson	Andre Lawson
27	5920	Murphy, Rowan	Rowan Murphy	Rowan Murphy

	Create a new column that shows people's first names, then a space, then their last names
Looki in <b>Co</b> l	ng at A1:B38, here's 1 formula column to review and insert lumn C:
First I	.ast Name
Refor follow name	mats each employee's name to display the first name ved by the last name, making it easier to read and sort s in the table.
fx	
=TE ","	XTAFTER(\$B2, ", ") & " " & TEXTBEFORE(\$B2, )
	Show explanation 🗸
	С
1	First Last Name
2	Juan Tepaz
3	Chetana Hegde
4	Swarnika Soni
5	Carmen Vella
+ Al-ger	Insert column erated content may be incorrect

## Separate <a href="mailto:first.last@email.com">first.last@email.com</a> addresses

- **Source**: Any dataset with a list of email addresses in <u>firstname.lastname@domain.com</u> format.
- **Prompt**: Separate < column with email addresses > into two columns for first name and last name.

10	A	В	С	D
40			-1 .	
41	Employee ID	Email Address	First name	Last name
42	2200	Juan.Tepaz@contoso.com	Juan	Tepaz
43	9612	Chetana.Hegde@contoso.com	Chetana	Hegde
44	6156	Swarnika.Soni@contoso.com	Swarnika	Soni
45	3313	Carmen.Vella@contoso.com	Carmen	Vella
46	6864	Akhilesh.Khare@contoso.com	Akhilesh	Khare
47	1043	Sigríður.Einarsdóttir@contoso.cor	Sigríður	Einarsdóttir
48	2501	Rohini.Vasav@contoso.com	Rohini	Vasav
49	4201	Neha.Benjaree@contoso.com	Neha	Benjaree
50	3211	Jahidi.Juma@contoso.com	Jahidi	Juma
51	3562	Sonu.Jain@contoso.com	Sonu	Jain
52	5469	Sanjay.Puranik@contoso.com	Sanjay	Puranik
53	3891	Shweta.Chourasia@contoso.com	Shweta	Chourasia
54	6069	Francisco.Tulul@contoso.com	Francisco	Tulul
55	9882	Isabel.Velásquez@contoso.com	Isabel	Velásquez
56	5965	Preeti.Rajdan@contoso.com	Preeti	Rajdan
57	2885	Moni.Sisodiya@contoso.com	Moni	Sisodiya
58	6410	Darshan.Srivastava@contoso.com	Darshan	Srivastava
59	7725	Reena.Shrivastav@contoso.com	Reena	Shrivastav
60	6790	Henry.Ross@contoso.com	Henry	Ross
61	4010	Devon.Torres@contoso.com	Devon	Torres
62	6332	Madison.Kim@contoso.com	Madison	Kim
63	5544	Hannah.Jarvis@contoso.com	Hannah	Jarvis
64	3013	Ellis.Turner@contoso.com	Ellis	Turner
65	3227	Shawn.Hughes@contoso.com	Shawn	Hughes

		name					
ooki nd [	ing at A1:B3 D:	8, here are 2 1	formula coli	umns to rev	iew and	insert in	Columns C
Firs	st name						
dra efor	cts the first e the perio	name of each d and removir	employee l 1g any extra	by taking th I spaces.	ie part of	their em	ail address
fx							0
=TF	RIM(LEFT(\$	B2,SEARCH("	.", \$B2)-	1))			
						Show exp	lanation 🗸
Las trac e te fv	st name cts the last ext betweer	name of each the period ar	employee f nd the "@" :	rom their e symbol.	mail addı	ress by ic	dentifying
Las trac e te fx =TF \$B2	st name cts the last ext between RIM(MID(\$E 2)-1))	name of each the period ar 2, SEARCH(".	employee f nd the "@" : ", \$B2)+1	rom their e symbol. .,SEARCH("	mail addı @", \$B2	ress by ic	dentifying
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Las etra e te fx =TF \$B2	st name cts the last i ext between RIM(MID(\$E 2)-1))	name of each the period ar 12, SEARCH(". C	employee f nd the "@" s ", \$B2)+1	rom their e symbol.	mail addı @", \$B2	) - SEARC Show exp	dentifying
Las trace to fx =TF \$B2	st name cts the last i ext between RIM(MID(\$E 2)-1)) First name	name of each the period ar 12, SEARCH(". C	employee f nd the "@" : ", \$B2)+1	SEARCH("	mail addı @", \$B2 e	) - SEARC	dentifying
Las trac e te fx =TF \$B2	st name cts the last i ext between RIM(MID(\$E 2)-1)) First name Juan	name of each the period ar 12, SEARCH(". C	employee f nd the "@" : ", \$82)+1	SEARCH ("	mail addı @", \$B2 e	) - SEARC	dentifying
Las trace te fx =TF \$B2 1 2 3	st name cts the last i ext between RIM(MID(\$E 2)-1)) First name Juan Chetana	name of each the period ar 12, SEARCH(". C	employee f nd the "@" : ", \$B2)+1	SEARCH("	mail addı @", \$B2 e	ress by ic ) -SEARC Show exp D	dentifying
Las trace te fx =TF \$B2 1 2 3 4	st name cts the last i ext between RIM(MID(\$E 2)-1)) First name Juan Chetana Swarnika	name of each the period ar 12, SEARCH(". C	employee f nd the "@" : ", \$B2)+1	Soni	mail addı @", \$B2 e	ress by ic )-SEARC Show exp D	dentifying
Las e te fx =TF \$B2 1 2 3 4 5	Time st name st name sext between axt bet	name of each the period ar 22,SEARCH(". C	employee f nd the "@" : ", \$B2)+1	Last nam Tepaz Hegde Soni Vella	mail addı @", \$B2 e	) - SEARC	dentifying
Las trace trace trace fx =TF \$B2 1 2 3 4 5 	st name cts the last i ext between RIM(MID(\$E 2)-1)) First name Juan Chetana Swarnika Carmen 	name of each the period ar 2, SEARCH(". C	employee f nd the "@" : ", \$B2)+1	Last nam Tepaz Hegde Soni Vella	e	) - SEARC	dentifying

## Formula help

- **Prompt 1:** Explain this formula: <example of an Excel formula>.
- **Prompt 2:** Can you give me an example of how to use =FORMULANAME in Excel.

### Explain a specific formula.

Explain this formula: =[@[Engaged Users]]/[@[Total users Targeted]]

This formula calculates the ratio of engaged users to the total users targeted.

- [@[Engaged Users]] refers to the value in the "Engaged Users" column for the current row.
- [@[Total users Targeted]] refers to the value in the "Total users Targeted" column for the current row.
- The formula divides the number of engaged users by the total number of users targeted for the current row.

### Ask for an example of how to use a specific formula.

Can you give me an example of how to use =TEXTAFTER

Sure! The TEXTAFTER function returns the text that occurs after a specified character or substring. Here's an example: Suppose you have a list of email addresses in column A, and you want to extract the domain part of each email address (the part after the "@" symbol). If cell A1 contains the email address user@example.com,

you can use the following formula to extract the domain:



## Lookups and cross-references across tables/ranges

• **Prompt:** Add a column that shows the revenue in USD. Look up the exchange rates on [worksheet name or column name].

	А	В	С	D	E	F	G	Н	I.	J	К 🛕				
1	Date	Country	Currency code	Tickets sold	Revenue	Rev per ticket	Revenue in USD 👻		Currency Code	Exchange Rate to USD		🌗 Copil	ot		~
2	3/17/2023	D United States	USD	42,000	8,304,442	198	8,304,442.00		ARS	0.0035			Add a column th	nat shows the revenue in USE	). Look
3	4/2/2023	D United States	USD	67,144	11,190,935	167	11,190,935.00		AUD	0.65			up the exchange	rates in column J	
4	4/13/2023	D United States	USD	62,500	13,837,195	221	13,837,195.00		BRL	0.20					
5	4/15/2023	D United States	USD	62,500	9,560,385	153	9,560,385.00		CAD	0.75				and a set of the set of the set of the	
6	4/21/2023	D United States	USD	67,144	8,472,993	126	8,472,993.00		CHF	1.10		Column	at AI:F51, here's 1 forn	nula column to review and in	isert in
7	5/26/2023	D United States	USD	66,655	14,716,386	221	14,716,386.00		EUR	1.10		Column	0.		
8	8/8/2023	D United States	USD	80,000	8,957,239	112	8,957,239.00		GBP	1.30		Revenu	e in USD		
9	8/9/2023	D United States	USD	80,000	10,436,051	130	10,436,051.00		MXN	0.055		Convert	s the revenue from vari	ious currencies to USD by mu	ultiplying
10	8/24/2023	D Mexico	MXN	50,865	205,709,463	4,044	11,314,020.45		PLN	0.25		the reve	nue by the correspond	ing exchange rate found in t	he
11	8/25/2023	D Mexico	MXN	80,000	244,487,286	3,056	13,446,800.73		SEK	0.095		currenc	/ exchange rates table (	(Table1) based on the current	cy code.
12	8/26/2023	D Mexico	MXN	84,567	189,960,969	2,246	10,447,853.29		SGD	0.73		fx			Π
13	8/27/2023	D Mexico	MXN	60,725	236,410,808	3,893	13,002,594.46		USD	1.00					-
14	11/9/2023	D Argentina	ARS	54,200	11,587,214,597	213,786	40,555,251.09					=[@Re	venue] * XLOOKUP([	@[Currency code]],	
15	11/10/2023	D Argentina	ARS	54,200	11,542,694,528	212,965	40,399,430.85					Table	1[Currency Code],	Table1[Exchange Rate to	
16	11/11/2023	D Argentina	ARS	54,200	13,295,534,436	245,305	46,534,370.52					USD])			
17	11/12/2023	D Argentina	ARS	54,200	7,110,556,215	131,191	24,886,946.75							Show explana	ation 🗸
18	11/17/2023	邱 Brazil	BRL	40,000	65,241,337	1,631	13,048,267.38							0	
19	11/18/2023	邱 Brazil	BRL	40,000	47,712,515	1,193	9,542,502.90					1 0	avanus in USD	6	
20	11/19/2023	邱 Brazil	BRL	40,000	60,886,197	1,522	12,177,239.40					2 8	304 442 00		
21	11/25/2023	邱 Brazil	BRL	76,125	56,501,268	742	11,300,253.60					3 1	1.190.935.00		
22	11/26/2023	🗇 Brazil	BRL	76,125	57,907,256	761	11,581,451.28					4 1	3,837,195.00		
23	2/7/2024	🗇 Australia	AUD	46,931	18,943,185	404	12,313,070.25					5 9	,560,385.00		
24	2/8/2024	🗇 Australia	AUD	46,931	18,708,163	399	12,160,305.95								
25	2/9/2024	🗇 Australia	AUD	46,931	14,292,490	305	9,290,118.50								
26	2/10/2024	邱 Australia	AUD	46,931	15,025,212	320	9,766,387.80					Al-genera	ted content may be incorrect		38
27	2/16/2024	fff1 Assetsatio	ALID	40.001	15 504 005	222	10 100 105 00								

## Visualize – charts and color

## Create a column chart and filter to a subset of values

- Source: Copy/paste sample below.
- **Prompt:** Create a column chart showing <RowName1> vs <RowName2>.

	A	В	C
1	Task	% of time	
2	Video games	30%	
3	Laundry	15%	
4	Cleaning	20%	
5	Creating pie charts	25%	
6	Making the pie charts pretty	10%	
7			
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24 25			



Here's a column chart showing the time spent on video games (30%) and laundry (15%). See the PivotChart above this message for more details.

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Task	% of time
Video games	30%
Laundry	15%
Cleaning	20%
Creating charts	25%
Making the charts pretty	10%

# **Creating tables and charts with filters**

- **Prompt 1**: Show sales volume by county.
- **Prompt 2**: Create a table grouping sales by county.

	A	Б	C C	U	E	F
1	Date of transaction	i Sales	County	City	State	Postal Code
2	Thursday, April 16, 2020	261	King	Skagit	WA	98122
3	Tuesday, November 2, 2021	449	King	Tukwila	WA	98188
4	Tuesday, January 12, 2021	316	Kitsap	Poulsbo	WA	98370
5	Saturday, February 25, 2023	454	King	Kent	WA	98031
6	Monday, July 11, 2022	16	King	Seattle	WA	98136
7	Saturday, December 3, 2022	17	Snohomish	Lynnwood	WA	98036
8	Monday, May 9, 2022	282	King	Federal Way	WA	98023
9	Monday, October 4, 2021	44	King	Bellevue	WA	98004
10	Saturday, July 10, 2021	20	King	Seattle	WA	98199
11	Wednesday, October 19, 2022	383	King	Bellevue	WA	98008
12	Monday, May 3, 2021	406	Snohomish	Bothell	WA	98021
13	Tuesday, November 1, 2022	302	King	Seattle	WA	98106
14	Tuesday, June 20, 2023	76	King	Kirkland	WA	98033
15	Saturday, August 26, 2023	347	Benton	West Richland	WA	99353
16	Saturday, January 4, 2020	56	King	Snoqualmie	WA	98065
17	Sunday, February 9, 2020	221	Clark	Camas	WA	98607
18	Friday, July 1, 2022	467	King	Seattle	WA	98115
19	Monday, January 2, 2023	178	King	Redmond	WA	98052
20	Thursday, March 11, 2021	273	Snohomish	Lake Stevens	WA	98258
21	Sunday, October 30, 2022	85	King	North Bend	WA	98045
22	Sunday, January 23, 2022	440	Clark	Battle Ground	WA	98604
23	Monday, May 2, 2022	86	Yakima	Yakima	WA	98902
24	Friday, October 29, 2021	464	Grays Harbor	Ocean Shores	WA	98569
25	Sunday, September 12, 2021	96	King	Seattle	WA	98115
26	Monday, September 12, 2022	486	Pierce	Lakewood	WA	98499
27	Friday, February 3, 2023	459	King	Federal Way	WA	98003
28	Friday, November 10, 2023	458	Spokane	Spokane	WA	99216
29	Monday, May 4, 2020	129	King	Bothell	WA	98011
30	Sunday, January 8, 2023	199	Whatcom	Bellingham	WA	98229
31	Tuesday, November 16, 2021	312	Skagit	Anacortes	WA	98221
32	Thursday, January 5, 2023	94	Pierce	Buckley	WA	98321
33	Saturday, July 3, 2021	101	King	Duvall	WA	98019
34	Wednesday, November 24, 2021	4	King	Maple Valley	WA	98038
35	Friday, March 13, 2020	344	Thurston	Lacey	WA	98516
36	Friday, May 5, 2023	248	King	Bellevue	WA	98007
37	Sunday, July 17, 2022	273	Spokane	Spokane	WA	99208
38	Monday, January 11, 2021	135	Thurston	Olympia	WA	98502
39	Thursday, January 9, 2020	272	King	Bellevue	WA	98006
40	Thursday, May 5, 2022	50	Pierce	Tacoma	WA	98445
41	Saturday, May 23, 2020	34	Benton	Richland	WA	99352
42	Friday, December 17, 2021	156	King	Seattle	WA	98115
43	Thursday, July 28, 2022	101	King	Bellevue	WA	98007
44	Monday, February 3, 2020	244	King	Seattle	WA	98119
45	Sunday, November 19, 2023	205	King	Seattle	WA	98119
46	Sunday, January 23, 2022	246	Clark	Vancouver	WA	98664
47	Tuesday, April 5, 2022	124	King	Bellevue	WA	98006
48	Thursday, May 4, 2023	112	King	Tukwila	WA	98188
49	Thursday, June 18, 2020	480	Island	Oak Harbor	WA	98277
50	Sunday, April 23, 2023	4	Clark	Washougal	WA	98671
51	Friday, September 29, 2023	206	King	Seattle	WA	98109
52	Tuesday, March 8, 2022	455	King	Sammamish	WA	98074



(1359), Clark (975), Benton (617), Spokane (586), and others. See the PivotChart above for more details.

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County	Sum of Sales	
Benton	617	
Clark	975	
Grays Harbor	434	
Island	397	
King	8542	
Kitsap	314	
Pierce	1359	
Skagit	334	
Snohomish	511	

I have summarized the total sales by each county and visualized it as a table. The total sales by county are as follows: Benton (617), Clark (975), and others. See the PivotTable above for more details.

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# **Beginning your highlighting – empty values**

- **Source**: Any dataset works with some values blank in a column.
- **Prompt**: Highlight empty values in <column name> yellow.

A	В	С	D	E	F		G	Н	I	J	K	L	М	N	0	F A
Campaign Owner	Name	Launch Date	Year	Quarte	r Campaign Type	E	Budget	Revenue	Total Users	Engaged	Engagement	Reviewed?	Managed	Needs		Copilot (Preview)
1	<b>•</b>	-	<b>•</b>			-	-	-	largeted	Users 🗸	Kate	<b>•</b>	account?	updates?		
2 Cartier, Christian	Billboards small	1/3/2024	2024	01	Brand marketing	\$	800	\$ 8,703	2,500	496	19.8%	No	No	No		- Under Backter and Backter and Backter
3 Glazkov, Ilya	Product review 3x	7/22/2021	2021	Q3	Customer Experience	ce \$	2,750	\$ 5,676	35,000	5,418	15.5%	Yes	No	Yes		Highlight empty values
4 Lawson, Andre	Targeted - Group 1	7/14/2023	2023	Q3	Digital marketing	\$	5,800	\$ 1,244	10,000	285	2.9%	No	Yes	No		
5 Halima, Yakubu	Late Jan Email	1/27/2021	2021	Q1	Digital marketing	\$	500	\$ 6,980	4,205	465	11.1%	Yes	Yes	No		
6 Kovaleva, Anna		5/9/2022	2022	Q2	Brand marketing	\$	250	\$ 4,732	2,000	500	25.0%	No	Yes	No		Sure! Looking at <b>A1:N13</b> here's 1 conditional
7 Smith, Avery	Billboards large	9/15/2023	2023	Q3	Brand marketing	\$	4,500	\$ 5,632	10,000	362	3.6%	Yes	No	Yes		
8 Halima, Yakubu	Feb email - North	7/14/2023	2023	Q3	<b>Digital marketing</b>	\$	500	\$ 12,423	4,205	902	21.5%	No	No	Yes		formatting rule to review and apply:
9 Halima, Yakubu		11/15/2023	2023	Q4	<b>Digital marketing</b>	\$	500	\$ 9,293	3,687	673	18.3%	No	Yes	Yes		
10 Halima, Yakubu	Feb email - West	9/12/2021	2021	Q3	Digital marketing	\$	500	\$ 16,342	5,278	1,029	19.5%	No	No	Yes		<ul> <li>Cell values that are blank: Apply the</li> </ul>
11 Connors, Morgan	Product mention 5x	7/14/2023	2023	Q3	Sponsorship	\$	635	\$ 2,208	55,000	1,470	2.7%	No	No	Yes		following to colls in A2(N12)
12 Barden, Malik	Industry Conference	12/1/2021	2021	Q4	Sponsorship	\$	600	\$ 4,540	950	618	65.1%	Yes	No	Yes		Tollowing to cells in A2.NTS
13 Macedo, Beatriz	Targeted - Group 2	10/1/2023	2023	Q4	Digital marketing	\$	800	\$ 1,564	2,000	367	18.4%	Yes	Yes	No		<ul> <li>Fill color: yellow</li> </ul>
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# **Continue your highlighting – duplicate values**

- **Source**: Any dataset works. Have some duplicate values in a column, or two rows that are duplicates of each other.
- **Prompt**: Highlight duplicate values in <column name> <color> .



# Finalize your highlighting – yes values

- Source: Any dataset works.
- **Prompt**: Highlight cells green where there's a "yes" in one or more columns.

4	A	В	С	D	E	F		G	н	1	J	K	L	М	N	0
Ca	mpaign Owner	Name	Launch Date	Year	Quarter	r Campaign Typ <del>e</del>	в	udget	Revenue	Total Users	Engaged	Engagement Rate	Reviewed?	Managed	Needs	Copilot (Preview)
1		-	-	<b>•</b>	-	· 🗸		-	-		-				upuutoo1 ▼	
2 Ca	rtier. Christian	Billboards small	1/3/2024	2024	01	Brand marketing	ŝ	800	\$ 8,703	2.500	496	19.8%	Yes	Yes	Yes	
3 GL	azkov. Ilva	Product review 3x	7/22/2021	2021	03	Customer Experience	Ś	2.750	\$ 5.676	35,000	5.418	15.5%	Yes	Yes	Yes	Highlight cells green where there's
4 La	vson. Andre	Targeted - Group 1	7/14/2023	2023	03	Digital marketing	Ś	5.800	\$ 1.244	10.000	285	2.9%	Yes	Yes	Yes	ringringrit cens green where there s
5 Ha	lima, Yakubu	Late Jan Email	1/27/2021	2021	01	Digital marketing	Ś	500	\$ 6,980	4,205	465	11.1%	Yes	Yes	No	a Yes in one or more columns
5 Ko	valeva, Anna		5/9/2022	2022	Q2	Brand marketing	\$	250	\$ 4,732	2,000	500	25.0%	Yes	No	Yes	
7 Sm	ith, Avery	Billboards large	9/15/2023	2023	Q3	Brand marketing	\$	4,500	\$ 5,632	10,000	362	3.6%	Yes	Yes	Yes	
3 Ha	lima, Yakubu	Feb email - North	7/14/2023	2023	Q3	Digital marketing	\$	500	\$ 12,423	4,205	902	21.5%	No	No	No	
Ha	lima, Yakubu		11/15/2023	2023	Q4	Digital marketing	\$	500	\$ 9,293	3,687	673	18.3%	No	Yes	No	
0 Ha	lima, Yakubu	Feb email - West	9/12/2021	2021	Q3	Digital marketing	\$	500	\$ 16,342	5,278	1,029	19.5%	Yes	No	No	Surel Looking at A1.N13 here's 1
1 Co	nnors, Morgan	Product mention 5x	7/14/2023	2023	Q3	Sponsorship	\$	635	\$ 2,208	55,000	1,470	2.7%	No	No	Yes	Sure: Looking at <b>AT.NTS</b> , here's t
2 Ba	rden, Malik	Industry Conference	12/1/2021	2021	Q4	Sponsorship	\$	600	\$ 4,540	950	618	65.1%	No	Yes	No	conditional formatting rule to review and
3 Ma	cedo, Beatriz	Targeted - Group 2	10/1/2023	2023	Q4	Digital marketing	\$	800	\$ 1,564	2,000	367	18.4%	Yes	Yes	No .	conditional formatting rate to review and
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# Ask questions about Excel

# Ask questions about Excel

How can I write a formula in Excel that forecasts revenue over time?

To forecast revenue over time in Excel, you can use the FORECAST.ETS function, which is designed for time series forecasting. Here's a step-by-step approach:

- 1. Prepare your data: Ensure you have two columns: one for the time period (e.g., months, quarters) and one for the revenue.
- 2. Use the FORECAST.ETS function: This function will predict future values based on historical data.

Here's an example formula assuming your time periods are in column A (from A2 to A11) and your revenue data is in column B (from B2 to B11):

fx	D
=FORECAST.ETS(A12, B2:B11, A2:A1	1)
This formula will forecast the revenue for period (A12). Adjust the ranges according data.	the next time to your actual
All successful and successful to the terminal	A 0

How can I calculate the standard deviation in excel?

To calculate the standard deviation in Excel, you can use the STDEV.P function for the entire population or the STDEV.S function for a sample.

Here's the formula for calculating the standard deviation of a sample:

U

And for the entire population:

П

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=STDEV.P(range)

fx

Replace range with the actual range of your data, for example, A1:A10.

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What are some intermediate level keyboard shortcuts I can use in Excel?

Here are some intermediate-level keyboard shortcuts you can use in Excel:

<ol> <li>Ctrl + Shift + L: Toggle filters on and off.</li> </ol>
2. Ctrl + T: Create a table from the selected data.
3. Ctrl + ;: Insert the current date.
4. Ctrl + Shift + :: Insert the current time.
5. Ctrl + Shift + "+": Insert a new row or column.
6. Ctrl + "-": Delete the selected row or column.
7. Alt + Enter: Start a new line within a cell.
8. Ctrl + 1: Open the Format Cells dialog box.
9. Ctrl + Shift + \$: Apply the currency format.
10. Ctrl + Shift + %: Apply the percentage format.
hese shortcuts can help you work more efficiently in Excel.
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# Ask questions about Excel (continued)

I'm trying to compare two datasets with some duplicates. I want to extract data from Address list 2 which is not present in Address list 1. The list sizes are not the same. How can I do that?

You can use the FILTER function along with the ISNA and MATCH functions to extract data from Address list 2 that is not present in Address list 1. Here's how you can do it: Assume:

- Address list 1 is in column A (A2:A100).
- Address list 2 is in column B (B2:B150).

You can use the following formula to extract the addresses from Address list 2 that are not in Address list 1:

fx		
=FILTER(B2:B150, 0)))	ISNA(MATCH(B2:B150,	A2:A100,

This formula will return the addresses from Address list 2 that are not found in Address list 1.

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How can I prevent other people from incorrectly entering an address in the wrong format in my sheet?

You can use Data Validation to ensure that addresses are entered in the correct format. Here's how you can set it up:

- Select the cells where you want to apply the data validation (e.g., column A).
- 2. Go to the Data tab on the Ribbon.
- 3. Click on **Data Validation** in the Data Tools group.
- In the Data Validation dialog box, go to the Settings tab.
- 5. In the Allow dropdown, select Custom.
- 6. In the Formula box, enter a formula that checks the address format. For example, if you want to ensure that the address contains a street number followed by a street name, you can use a formula like this:

fx						$\square$
=ISNUMBER(LEFT(A1,	FIND("	",	A1)-1)	*	1)	

- Go to the Input Message tab to provide a message that will guide users on the correct format.
- Go to the Error Alert tab to set up an error message that will be displayed if the data entered does not meet the criteria.
- 9. Click **OK** to apply the data validation.

This setup will ensure that users enter addresses in the specified format. Adjust the formula as needed to match your specific address format requirements.

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What's the best Excel formula that most people don't know about?

One of the best Excel formulas that many people don't know about is the LET function. It allows you to assign names to calculation results, making complex formulas easier to read and more efficient.

Here's an example of how to use the LET function:

fx =LET(x, A1 + A2, y, A3 + A4, x \* y)

In this example:

- x is assigned the value of A1 + A2.
- y is assigned the value of A3 + A4.
- The formula then calculates x \* y.

This makes it easier to manage and understand complex calculations.

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## Additional resources

# Links to learn more (1 of 2)

<u>Copilot in Excel Blog</u> for more examples <u>Copilot Readiness Hub</u>

What is Copilot?

- Introducing Copilot for Microsoft 365
- The Copilot System
- ChatGPT vs. Copilot for Microsoft 365: What's the difference?

### How Copilot works

- How Copilot for Microsoft 365 works: Microsoft Mechanics video
- <u>Semantic Index for Copilot</u>
- Microsoft Graph
- <u>Microsoft Graph connectors</u>
- Additional copilot experiences across the Microsoft Cloud
  - Microsoft Dynamics 365 Copilot
  - <u>Copilot in Power Platform</u>
  - <u>Microsoft Security Copilot</u>
  - <u>GitHub Copilot</u>
  - <u>Copilot in Microsoft Stream</u>

### Privacy

- <u>Microsoft's privacy policy</u>
- <u>Microsoft Privacy Statement</u>
- <u>Trust Center data protection and privacy</u>
- Data, privacy, and security for Copilot for Microsoft 365
- Data, privacy, and security for Azure OpenAl Service
- <u>Role-based access control</u>
- User permissions and permission levels in SharePoint Server
- <u>Customer Lockbox requests</u>
- Microsoft 365 isolation controls
- Data Protection Addendum

# Links to learn more (2 of 2)

### Data residency and storage

- EU Data Boundary
  - Website
  - <u>Blog</u>
  - <u>Documentation</u>

### Compliance

- Microsoft Compliance
- Service Trust Portal
- <u>Compliance offering definitions</u>
- General Data Protection Regulation (GDPR)
  - Full summary
  - Short summary

### Security

- <u>Configure usage rights for Azure Information Protection (AIP)</u>
- Universal Licensing Terms for Online Services
- Data Protection Addendum
- Isolation and Access Control in Microsoft 365

### How to prepare for Copilot for Microsoft 365

- Learn about Microsoft feedback for your organization
- Manage Microsoft feedback for your organization
- How to manage Microsoft Search
- <u>Microsoft 365 Product Terms</u>
- <u>Content management and security in SharePoint, OneDrive,</u> and Teams
- <u>Transcription Management in Copilot for Microsoft 365</u>
- Responsible AI
- Responsible AI core principles
  - <u>Videos</u>
  - Documentation
- <u>Microsoft Responsible AI Standard</u>
- Governing AI: A Blueprint for the Future