

COPILOT IN EXCEL: FREQUENTLY ASKED QUESTIONS

This document addresses the most common questions that come up when using Copilot in Excel. The goal is to clarify what Copilot does well, how it fits into existing Excel workflows, and where responsibility sits when it comes to access and governance.

1. Is My Data Safe When Using Copilot?

Copilot in Excel follows the same security, identity, and permission boundaries that already apply to Excel, OneDrive, and SharePoint.

- Copilot can only access data that you already have permission to access
- It does not gain visibility into other users' files or restricted content
- Organizational Copilot data and prompts are not used to train public AI models
- All usage respects your organization's Microsoft 365 tenant configuration

In practice, this means Copilot operates within the same trust model your organization already relies on for Excel and Microsoft 365.

If Copilot has been approved and enabled in your environment, the underlying data governance decisions have already been made as part of that process.

2. Does Copilot Hallucinate or Make Mistakes?

Copilot can make mistakes, especially when working with:

- Ambiguous or poorly structured data
- Unclear prompts
- Incomplete context

For that reason, Copilot should be treated as:

- A draft generator
- A workflow accelerator
- A starting point, not a final authority

Copilot is particularly effective at:

- Generating first-pass formulas
- Summarizing data patterns
- Exploring “what-if” questions
- Speeding up repetitive Excel tasks

However, results should always be reviewed, validated, and refined by the user, just as you would with formulas, PivotTables, or Power Query steps.

3. Do I Have Copilot in Excel?

There are a couple of quick ways to confirm whether Copilot is available to you and which version you have.

- Look for Copilot in the Home tab of the Excel ribbon
 - Open Excel and look for the Copilot button in the ribbon.
 - If you see a Copilot dropdown, Copilot is enabled in your environment.
 - If you see App Skills listed under the Copilot menu, this indicates you have the paid Copilot experience.
 - This is the version that can take actions and help automate Excel tasks, not just generate suggestions.
- Check your subscription details in Excel
 - Go to File > Account in Excel.
 - Under your subscription or license information, you should see a Copilot icon listed if Copilot is included in your plan.
 - If Copilot does not appear there, it usually means it has not been assigned to your account yet.

If Copilot isn't showing up in the ribbon or under your subscription:

- Availability is usually tied to license assignment or tenant configuration
- Access can vary by organization, role, or rollout stage

In these cases, your internal IT or Microsoft 365 admin is the best point of contact. They can confirm whether Copilot has been purchased, assigned, or scheduled for rollout within your organization.

Final Note

As an Excel trainer and consultant, my focus is on how to use Copilot effectively: where it adds value, where it requires judgment, and how to validate and integrate it into real Excel workflows.

Questions around licensing, tenant configuration, and security policies are important, but they're primarily operational and are best handled by your IT or Microsoft 365 administration team.

If you're ready to move beyond surface-level questions and focus on making Copilot genuinely useful in day-to-day work through practical workflows and a clear adoption plan, I'm happy to help.

To get started, get in touch or book a call: stringfestanalytics.com/contact/