

# Copilot for Excel:

## How to Log & Audit Your Work Across Sessions

*A reusable 3-prompt pattern you can apply to any Excel workbook.*

**The problem:** Copilot in Excel has limited session memory. Your most recent conversation may still be visible when you reopen a workbook, but once you start a new conversation, the previous one is no longer accessible.

**The fix:** Make Copilot write its own log inside the workbook. Because the log lives in the file itself, it persists across sessions and gives Copilot the context to pick up where it left off.

### Step 1: Set Up the Log

Run this once, at the start of any workbook you want to track. You never need to run it again in the same file.

```
Set up a persistent logging system in this workbook.

Create a worksheet called "Copilot_Log" if it does not already exist.

In that sheet, create a table named "CopilotLog" with these columns:
  Timestamp | Task | Prompt | Actions | Output Location | Notes

Format it as an Excel table so it expands automatically.

Add a note above the table that says:
  "This table records all Copilot actions. Every task must be logged."

Do not perform any analysis yet. Confirm when setup is complete.
```

### Step 2: Do Work and Log It

Use this every time you ask Copilot to do something.

```
Before completing this task, review the Copilot_Log sheet and continue the log.

Task: Build a simple performance summary for management.

Steps:
- Add a new column to the Performance table called Profit = Revenue - Cost
- Add another column called Margin % = Profit / Revenue
- Create a PivotTable on a new sheet called "Performance Summary"
- Show total Revenue, Profit, and average Margin % by Region

After completing:
Add a new row to CopilotLog with:
- Timestamp
- Task
- Prompt (summarized)
- Actions taken
- Output location (sheet and cells)
- Notes (any assumptions)

Do not skip logging.
```

Between sessions, just save normally (Ctrl+S). The log lives in the file; nothing is lost.

### Step 3: Resume After Reopening

Run this first every time you reopen a workbook that uses the logging system. It re-oriens Copilot before you do anything new.

```
Check if a worksheet named "Copilot_Log" exists in this workbook.
```

```
If it does:
```

1. Read the most recent entries in the CopilotLog table.
2. Summarize the last task performed and where the output is.
3. Confirm you will continue logging all future actions.

```
If it does not exist:
```

```
Tell me no logging system has been set up yet.
```

```
Do not modify anything yet — just confirm readiness to continue.
```

Then continue with Step 2 for every new task. The cycle repeats indefinitely. For example, we could get a summary next:

```
Before completing this task, review the Copilot_Log sheet and continue the log.
```

```
Task: Identify the Region with the highest average Margin % and highlight it in the Performance Summary.
```

```
After completing:
```

```
Log the task in CopilotLog with full details.
```

```
Do not skip logging.
```

### If Things Go Wrong

**Forgot to log**

"Log that last step in Copilot\_Log before we continue."

**Entry too vague**

"Update the last row in CopilotLog. Be more specific about what changed and why."

**Can't find sheet**

Check the sheet is still named "Copilot\_Log" exactly. Rename it if needed.

**Ignores log**

"Read every row in CopilotLog and summarize what has been done in this workbook."

### Log Column Reference

Column	What It Captures
<b>Timestamp</b>	When the action occurred
<b>Task</b>	Short label: e.g. "Build revenue PivotTable"
<b>Prompt</b>	Brief summary of what you asked Copilot
<b>Actions</b>	Step-by-step: what Copilot actually did
<b>Output Location</b>	Exact sheet name, cell range, or object
<b>Notes</b>	Assumptions made, edge cases, anything to flag

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A log turns AI assistance into a traceable, auditable workflow you can stand behind.