

Copilot in Excel: Personalization vs. Workbook Rules

One question decides where an instruction lives: does it belong to you, or to the workbook?

Personalization (custom instructions)	Workbook rules (.Rules sheet)
Describes You: your tastes and defaults Where it lives Your Microsoft account: Copilot pane > Settings (...) > Personalization Scope Every workbook, every session, every device Who it affects Only you. Private, never shared or saved in any file Travels with a shared file? No Best for Formatting tastes, formula style, level of detail	Describes The workbook: its definitions and conventions Where it lives A visible worksheet named .Rules, one rule per cell in column A Scope That one workbook only Who it affects Everyone who uses Copilot in that file Travels with a shared file? Yes, automatically, with no recipient setup Best for Definitions, data locations, layout conventions, do-not-touch zones

Where common instructions go

"Show currency in whole dollars"	Personalization
"Keep explanations brief"	Personalization
"Gross margin = (Revenue - COGS) / Revenue"	Workbook rules
"Sales data lives in the tblSales table"	Workbook rules
"Never edit the Data tab"	Workbook rules
"Make this one a clustered bar chart"	The prompt: one-time requests need no permanent home

Used together, they create three layers: your preferences, the workbook's rules, and the prompt for the task at hand. Rules are guidance, not a guarantee. Review the output, and keep the .Rules sheet visible or Copilot ignores it.