

ANALYZE

Intermediate

20 MIN

• UPDATED 2026-10-01

Ground Excel analysis in a live Power BI report.

Attach a governed Power BI report to Excel so Copilot analyzes trusted, up-to-date numbers instead of a stale export.

MICROSOFT 365

Excel

Power BI

WORKS WITH

Copilot

Business Outcome

Analysis built on the same governed numbers finance already trusts, with no manual export step to go stale.

Workflow Steps

Step 1: Confirm which Power BI report is the governed source

Power BI

Check with the report owner that this is the version finance actually signs off on — attaching the wrong or an unofficial copy defeats the point of grounding in governed data.

Step 2: Attach the report to your Excel workbook

Excel

Use Insert > Add from Power BI (or Data > Get Data > From Power BI) to connect the live report directly into the workbook, rather than exporting its data to a static range — a live connection means every question you ask later in step 3 pulls current numbers, not a snapshot from whenever you happened to export it.

Step 3: Ask Copilot to analyze performance and identify trends

Copilot in Excel

Ask specific questions — which region is behind plan, what changed since last quarter — rather than a generic "summarize this."

PROMPT

Using the attached Power BI report, identify the three regions furthest behind their quarterly plan and explain what changed in each, citing the specific measures you're using.

Step 4: Verify any number before quoting it externally

Excel

Spot-check a cited figure against the Power BI report directly before it goes into a document someone outside the team will see.

✓ Check the work

- The attached report is confirmed as the governed, not a personal or stale, version.
- Every cited number traces back to a specific measure in the report.
- At least one headline figure was independently verified before external use.

Expected Outcome

A written analysis of performance and trends, sourced directly from the live Power BI report.

Want help rolling this out across your team? **Go to Liminals.Tech** ■