AI AT WORK · BEGINNER · 12 MIN READ

Data and spreadsheets with AI

Clean up messy lists, write formulas, make charts and find answers in your numbers, without trusting the AI blindly.

Pass the check (4 of 5) online to earn the “Data Detective” badge:
https://digitalbuilders757.com/university/study/data-and-spreadsheets-with-ai

Most business data lives in spreadsheets

Sign-up lists, sales, inventory, budgets, attendance: most small organisations run on Google Sheets or Excel. AI is now built into both (Gemini in Sheets, Copilot in Excel), and assistants like ChatGPT and Claude can analyse a file you upload by writing and running code on it.

What to ask for

- Clean: 'Split full names into first and last, fix capitalisation, remove duplicate emails.'
- Formulas: 'Write a formula that shows Overdue if column D is before today and column E is empty.' Ask it to explain the formula too.
- Summaries: 'Total sales by month and by product, as a table.'
- Charts: 'A line chart of weekly sign-ups with a short title that says what changed.'
- Questions: 'Which five customers haven't ordered in 60 days?'

Trust, but verify

AI can misread columns, drop rows or quietly make up numbers when it's describing data instead of calculating it. Ask it to show the formula or code it used, spot-check a few rows by hand, and compare totals with a number you already know (last month's total, the row count).

Keep the original file untouched and work on a copy, so a bad clean-up is never a disaster.

Privacy first

Customer lists, student records and health or money information are personal data. Use the AI tools your school or company has approved, remove columns the task doesn't need (often names, emails and phone numbers), and don't upload other people's personal data to tools you haven't checked.

When it outgrows a spreadsheet

If several people edit at once, you need sign-in and permissions, or the sheet has many thousands of rows and links between tabs, it's time for a database (see Supabase and databases). A dashboard can then show the numbers that matter.

Key terms

Spreadsheet
A grid of rows and columns for data and calculations, like Google Sheets or Excel.

CSV
A plain-text table with values separated by commas, for moving data between tools.

Chart
A picture of data (line, bar, pie) that makes a pattern easy to see.

Database
Organised storage for everything an app must remember.

Formula
A calculation in a spreadsheet cell, like =SUM(B2:B10).

Dataset
A collection of related data, like all of this year's orders.

Personal data
Information about an identifiable person, like names, emails or grades; follows privacy rules.

Try it: Clean and chart a messy list

1. Make a copy of any messy list you have (or ask AI to generate a fake one with mistakes).
2. Ask AI to clean it and to list every change it made.
3. Ask for one summary table and one chart, with the formula or code it used.
4. Spot-check three rows and one total by hand.

KNOWLEDGE CHECK

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5 questions. Circle one answer for each; 4 or more correct passes. Answers are at the back.

1. An AI gives you a total from your spreadsheet. How do you check it?

A. Trust it
B. Round it
C. Ask it again in a new chat, and if both totals match, trust it
D. Ask for the formula it used and spot-check a number you know

2. Before cleaning data with AI, you should:

A. Work on a copy and keep the original untouched
B. Delete the original so the AI can't get confused by duplicates
C. Email it to the whole team so everyone can review it first
D. Remove all headers

3. What is a CSV file?

A. A video format
B. A plain-text table with values separated by commas
C. A password file
D. A type of chart

4. Which data should you be most careful about uploading to an AI tool?

A. A list of brand colours your designer chose
B. Public weather data from a government website
C. Personal details of customers or students
D. A recipe you found in an old family cookbook

5. When is it time to move from a spreadsheet to a database?

A. Never
B. When you want a new font
C. As soon as you have 10 rows
D. When many people edit at once, you need permissions, or it gets very large and linked

Official sites

Google Sheets help: https://support.google.com/docs/topic/9054603
Microsoft Excel help: https://support.microsoft.com/excel

Last reviewed 2026-11-25. AI tools change fast; check each tool's own site for current features, plans and prices.

ANSWER KEY

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1. D: Ask for the formula it used and spot-check a number you know
Seeing the method and spot-checking catches misread columns and invented numbers.

2. A: Work on a copy and keep the original untouched
A copy means any bad change is easy to undo.

3. B: A plain-text table with values separated by commas
CSV (comma-separated values) is the simplest way to move tables between tools.

4. C: Personal details of customers or students
Personal data follows privacy rules; use approved tools and remove what you don't need.

5. D: When many people edit at once, you need permissions, or it gets very large and linked
Databases handle many users, permissions and scale better than sheets.