

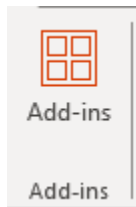
You may not be able to get CoPilot in your Microsoft 365, but you can get ChatGPT.

The other day I downloaded a spreadsheet that contained information about organizations that were seeking to team with Prime Selectees of Renew America's Nonprofits Grant from the Department of Energy. It has several thousand rows, with columns for Name of Organization, Email Address, Phone Number, Type of Organization, Intended Program Engagement, Geographical Area, Area(s) of Technical & Programmatic Expertise, and Description of Needs & Capabilities. These are all self-reported text fields so as we like to say the data is not well normalized.

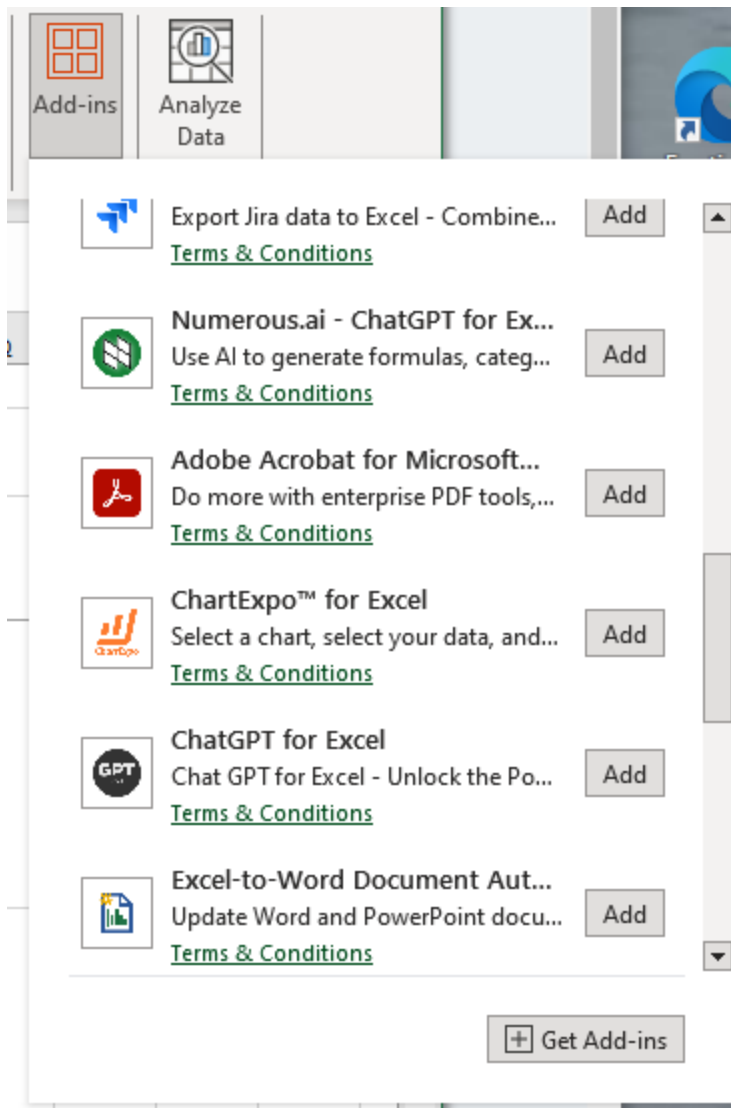
For example, the geographical areas were not standardized (e.g. "Northeastern United States", "Durham, North Carolina", "North Central Kansas - Pottawatomie County, Kansas"), the Type of Organization values were all over the place, and the Area(s) of Technical & Programmatic Expertise ranged from "none" to short and to the point explanations to long and rambling. I started to wonder how I could make this information usable, and thought there had to be an "AI" solution that could might be able to summarize this information and assign usable keywords to tags to each row.

I had been seeing Microsoft CoPilot popup on things and in Microsoft Edge lately, and as a collaborator in a company that has a Microsoft Partner subscription, I figured there must be a way to use it in Office apps. However, when I looked into it, I learned that while there is a CoPilot license available for Microsoft 365, they require an existing business license with at least 300 seats, and charge \$30/seat to add CoPilot. That's not going to fly for a small consulting firm or for any of the non-profits that I've worked with. (BTW, In another post I will talk about free and low cost software availability for non-profits.)

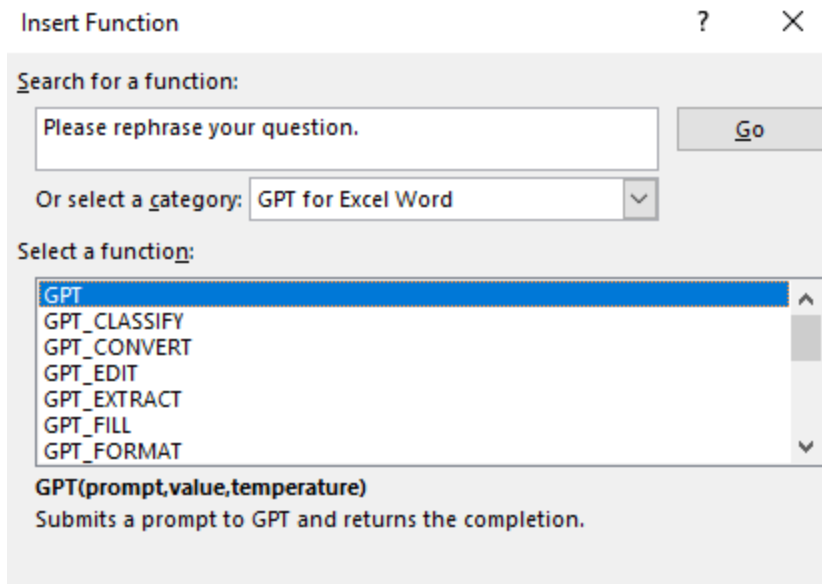
I did a bit of searching and got a lead that there might be "Add-ins" available that would provide some of this capability. An Excel add-in is a software program that adds new features to Microsoft Excel. I went back to Excel and clicked on "Add-Ins" on the Home Ribbon.



Clicking on it revealed a list of Add-in programs, some of which were in fact ChatGPT implementations, like Numerous.ai and ChatGPT for Excel shown in the screen shot below.



In installed one called "GPT for Excel and Word". In Excel it added a number of functions that I can use, which show up in the Excel function list:



You can find a brief description of the product at <https://appsource.microsoft.com/en-us/product/office/wa200005502?tab=overview>. Documentation is at <https://gptforwork.com/help/gpt-for-excel/gpt-functions/all-available-functions>. There's a cost for this and it is based on token usage. We will see what that turns out to be in data actually processed.

Now taking the geographies, let's say I want to create a region column based on the reported "Geographical Area". I used the function

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=GPT_CLASSIFY(G2,"Northeast, Northwest, Southeast, Southwest, MidWest, South Central, Rockies, West Coast")
```

Where the Geographic Area is in column G, and I copied that down 100 rows. It did fairly well, for instance

Reported Geographic Area	GPT function returned
New York, New Jersey, Connecticut, Pennsylvania, Florida, Massachusetts, Illinois	Northeast
Texas, Oklahoma, New Mexico, Kansas, Colorado	South Central
Denver Colorado	Rockies
Westchester County, NY	Northeast
Charlotte, North Carolina	Southeast

Next I wanted to produce 24 word summaries of the “Description of Needs & Capabilities”, so I used the function

=GPT_SUMMARIZE(14, 24)

That produced summarizations like

<p>Some of Richmond Ballet’s current heating, ventilation, and air conditioning (HVAC) units have been in use since 2000. At the end of their natural lives, four units are experiencing issues and need replacing. Richmond Ballet has created a plan to begin replacing these units with several considerations in mind, including the six month order period, the crane rental requirement, and the optimal season in which to halt HVAC functionality. The replacement of these units will allow Richmond Ballet to continuing operating its professional company, ballet school, and community engagement programs with reduced energy bills and improved building efficiency.</p>	<p>Richmond Ballet plans to replace four HVAC units that have been in use since 2000, considering factors like order period, crane rental, and optimal season. This will improve efficiency and reduce energy bills.</p>
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For my last trick, I want to make a concise list of services each agency/entity offers. To do that I used the function GPT_Tag which made a list of tags out of the service description, e.g. it took

“We have been exploring green energy/ sustainable initiative for the last five years. We have successfully installed two EV charging stations. We have been working with local sustainable energy advocates to decrease our own footprint and promote sustainability programing.” and tagged it as “Green energy”. For many agencies/entities it created multiple tags, like “green energy, sustainable initiative, EV charging stations, local sustainable energy advocates, footprint, sustainability programing”, so I used the GPT_hsplit function to put each of these tag values into a cell in a separate column. Now this information is getting useful.

Applying the functions I have used to 96 rows has cost me about \$.20 so I may continue. Hopefully others find this useful.