

ANALYST & BI EDITION

The Data Desk

THE FIELD GUIDE

Your complete guide to the program - every section, every level.
An AI training program for real-world workflows.

24 Modules

400+ Scenarios

Beginner to Proficient

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SECTION 01

Start Here (Read This First)

AI is not here to replace you - it is here to be a teammate who pulls you through the busywork. It handles the tedious busywork so you can focus on the work that needs your judgment.

There is no coding, no tech degree, and no pressure. If you can send a text message, you can do everything here.

Will this take my job? The people who get replaced are not the ones who use AI - they are the ones who do not learn it while everyone else does. AI is weak at the things that make you valuable (judgment, knowing your customers, catching when something is off). Use it for the grunt work; keep doing the thinking.

The two tools you will use: Microsoft Copilot (built into your Microsoft 365 apps - great inside Excel, Outlook, and Teams) and Claude (a web app - great for reasoning, analysis, and writing). Every scenario is labeled with the tool that fits best, so you never have to guess.

SECTION 02

Your First 5 Minutes

The goal is one small, confidence-building win. That is it.

- 1 Open your AI tool. Claude or Copilot - whichever your company gave you. It is just a box you type into, like texting a very fast assistant.
- 2 Copy this starter prompt and paste it in:

Act as my friendly assistant. In plain language, give me three quick ways AI could save me time in a typical workday. Keep it short and practical, with no jargon.

- 3 Read what comes back. Congratulations - you just used AI. Keep what is useful and ignore what is not.

TIP Everything else is a variation of that same move: say what you want, in plain words, and let it help.

SECTION 03

The GCES Method

A one-line prompt gets a vague answer. GCES is a simple four-part recipe that gets you exactly what you need. You do not need all four every time, but the more you add, the better the result.

- Goal - what you want it to do. e.g. "Summarize these overdue invoices."
- Context - your situation. e.g. "I am in AP, prepping for a CFO review."

- Expectations - format, tone, length. e.g. "As a table; flag anything 90+ days late."
- Source - the data to use. e.g. "The emails in my inbox tagged AP."

TIP Stuck building a prompt? Open the Data Desk Assistant (bottom-right) and choose "Help me with a prompt." It walks you through GCES step by step.

SECTION 04

Modules and Scenarios

Modules are departments - Accounting, Sales, Inventory, HR, and 20 more. Each is full of scenarios: real examples of using AI for that work, every one with a ready-to-copy prompt.

- 1 Pick your module under "The 24 Modules." They are listed alphabetically.
- 2 Choose a level - Beginner (quick wins), Intermediate (multi-step tasks), or Proficient (advanced workflows & agents).
- 3 Open a scenario and copy the prompt. Paste it into Claude or Copilot, then swap in your own details (anything in [brackets]).
- 4 Mark it complete to earn points and track your progress.

TIP Each module also has a Prompt Library of quick copy-ready prompts, and there is a Prompt Vault of all-purpose prompts for any role.

SECTION 05

Your Personal Tools

These features make the program yours. They all live in the top bar.

- Learning Paths - pick the role closest to your job and get an ordered checklist of scenarios that checks itself off as you finish.
- Progress - your points, scenarios completed, a bar for every module, and achievements. Climb the ranks: Analyst -> Senior Analyst -> Lead Analyst -> Data Architect. Finish a whole module to unlock a printable certificate.
- Saved Prompts - save any prompt, then copy, edit, reset, or remove your saved prompts anytime.
- Search - jump to any scenario, agent, or demo. Press Ctrl/Command + K on a laptop.
- The Data Desk Assistant - explains features, runs guided tours, and helps with prompts, anytime.

SECTION 06

FAQ and Quick Answers

Do I need to install anything?

No. It runs in your browser, and the AI tools are web pages or built into your Microsoft apps.

Is my work saved?

Your progress, saved prompts, and chosen role are stored privately in your own browser. Same browser plus device means it will be there next time.

Will AI give me wrong answers?

Sometimes - that is why you stay in charge. Always read what comes back and apply your own judgment.

Is it safe to paste company info?

Follow your company data policy. When in doubt, ask your manager or IT which tool is approved for sensitive information.

Do I have to earn points?

No. They just make progress visible and a little fun. There is no test and no deadline.

I am still nervous - where do I start?

Section 2: one prompt, one copy-paste, one quick win. That is genuinely all you need on day one.

The people who learn this do not work harder. They just stop doing the busywork - and become the one who gets it.

New here? Your first question is on us.

Stuck on a real task from your own work? Send it over - we will answer it personally, free. No bots, no sales pitch.

Doing this for a team? Book a call - calendar.app.google/DrFGyF3sra6YXBx7

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