

Copilot in Fabric Explained for the Administrator!

Benni De Jagere

Principal Program Manager, Fabric CAT

 /bennidejagere



Benni De Jagere

Principal Program Manager | Fabric Customer Advisory Team (FabricCAT)



Fabric CAT



.be Member



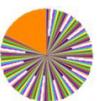
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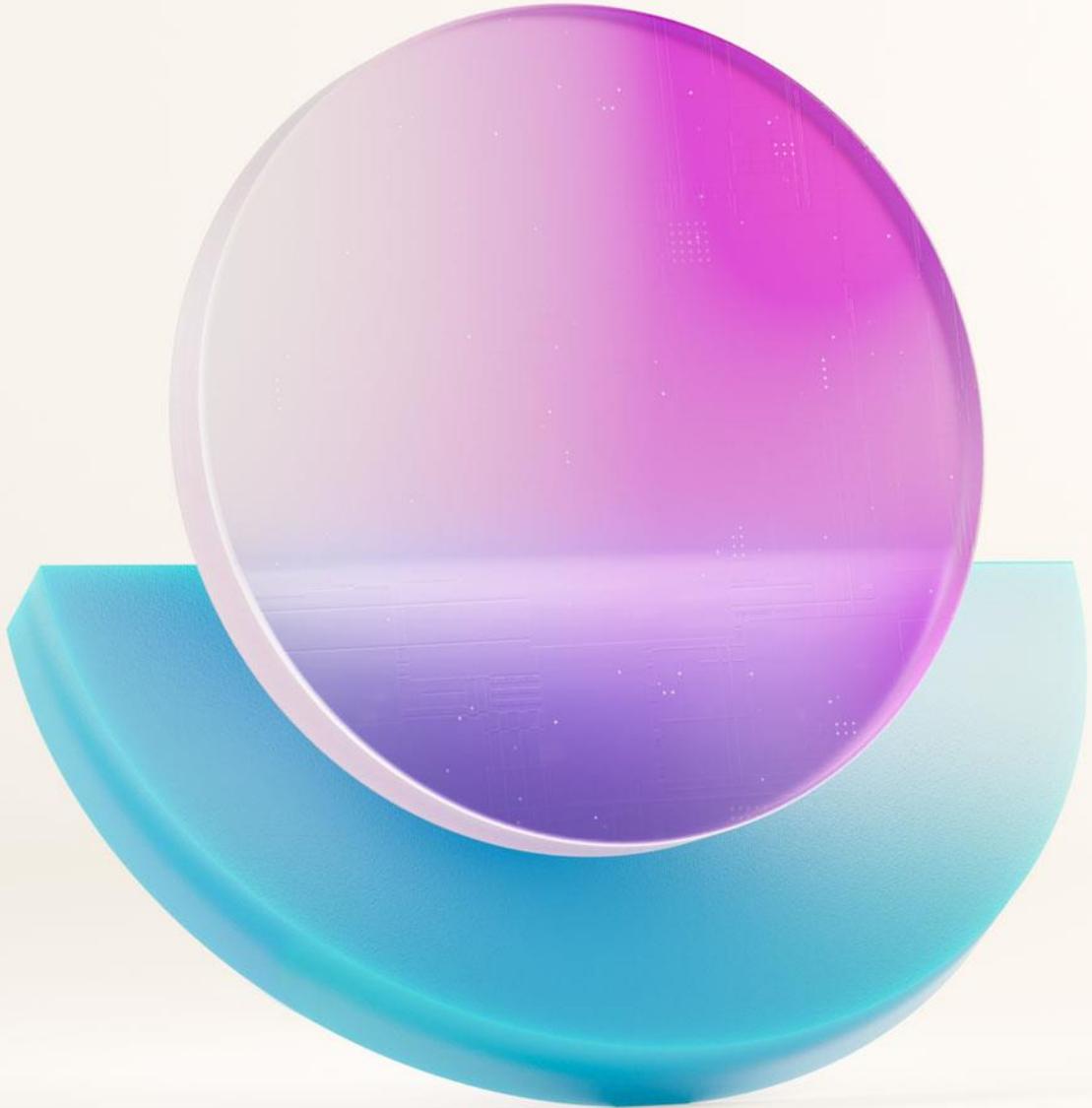


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#SayNoToPieCharts





Setting The Scene

Things we'll cover

Access Control

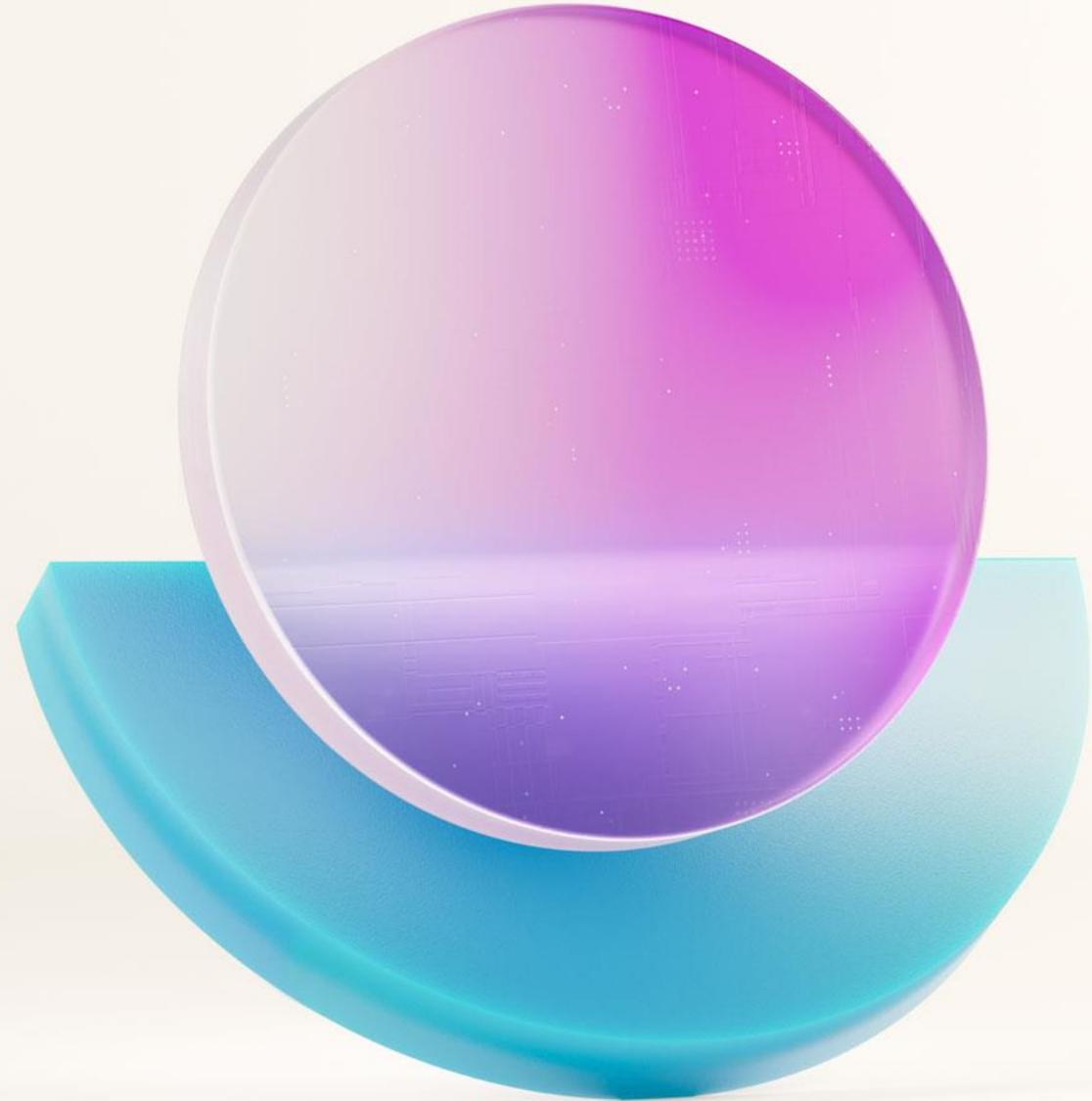
Data Residency

Capacity Consumption

Audit Logs

Random things I've seen, because I've been too deep 😊

BONUS.. User Education



Where Copilot fits in

Microsoft Fabric

The unified data platform for AI transformation



Data
Factory



Analytics



Databases



Real-Time
Intelligence



Power BI

Fabric Platform



AI



OneLake



Governance

Copilot Experiences in Fabric

Gen AI accelerates
your data journey
in Fabric



Copilot accelerated
experiences

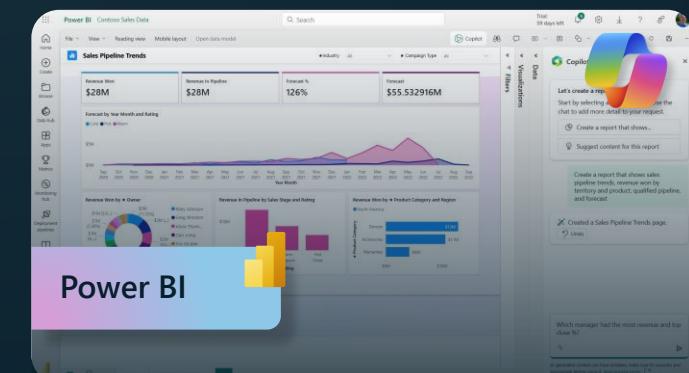
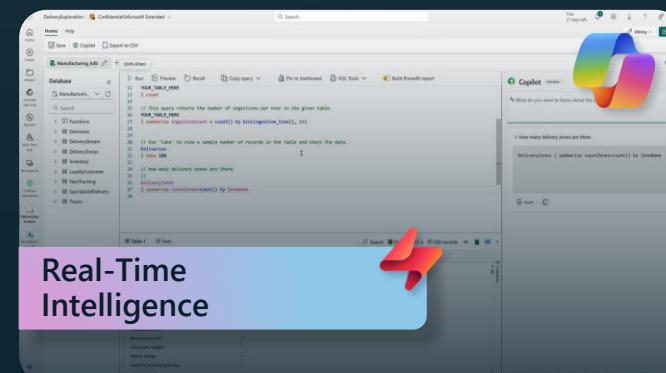
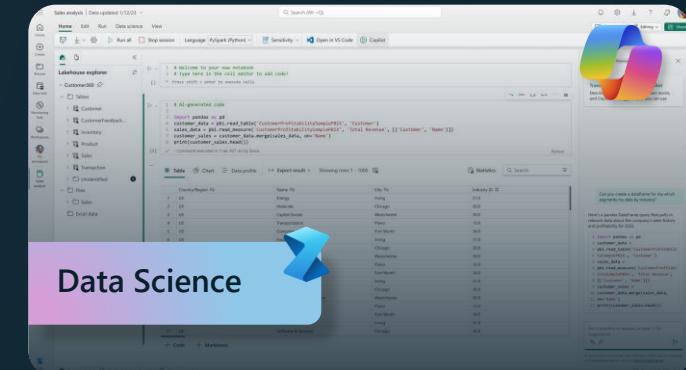
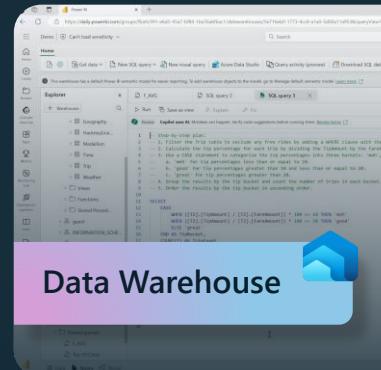
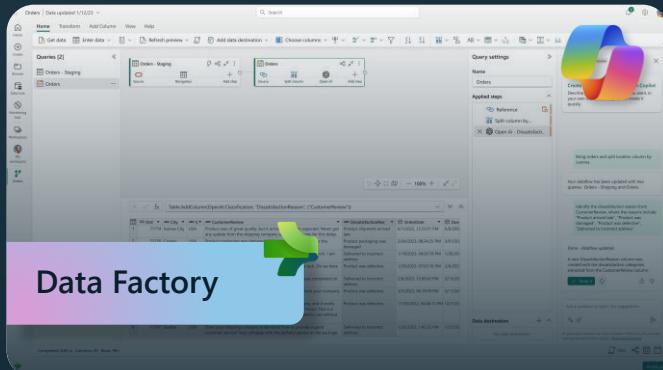
Generally available



Chat with
your Data

Public preview

Copilot Integrated in every Microsoft Fabric Experience



Microsoft Fabric

The unified data platform for AI transformation



Power BI



Semantic Models



Exploration



Visualization



Chat



AI



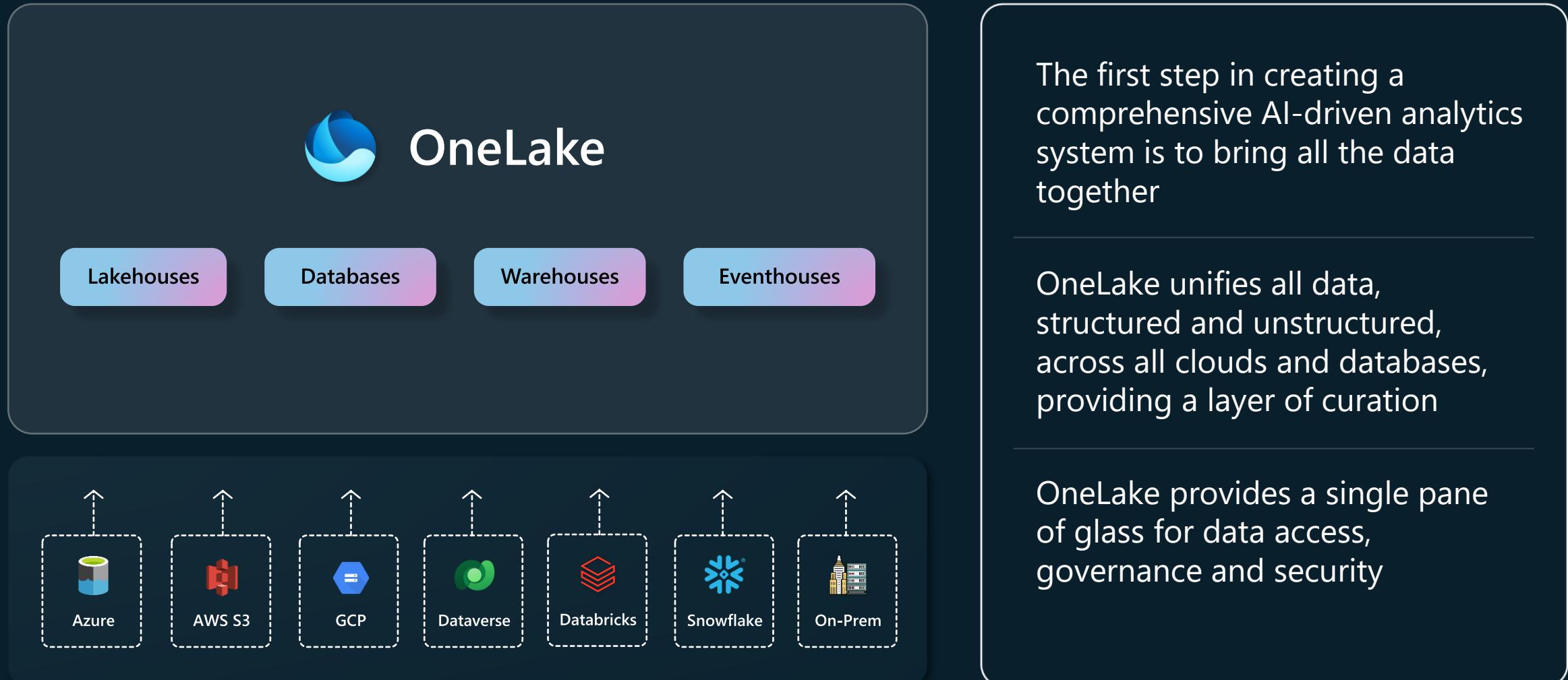
OneLake



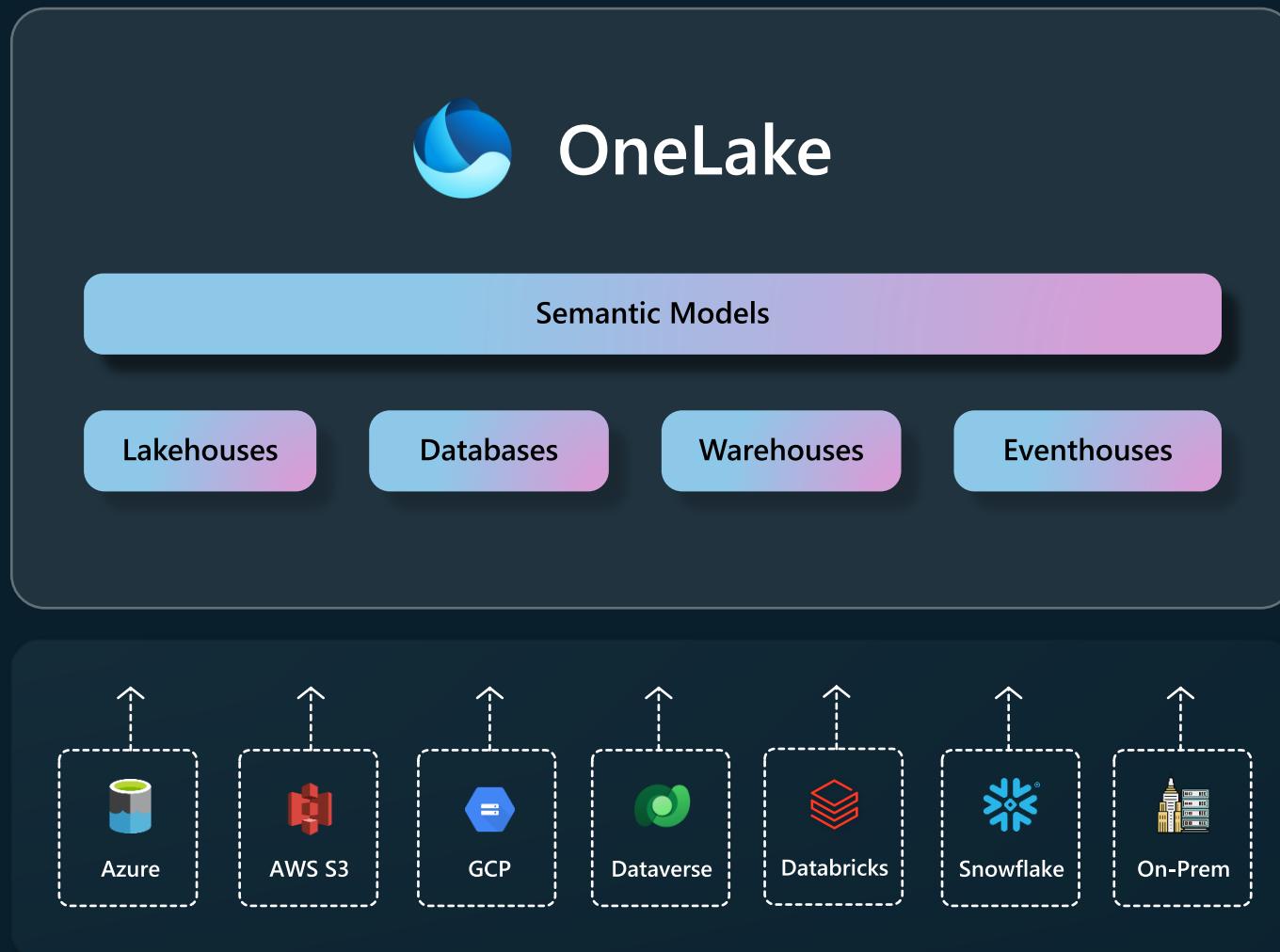
Governance

Fabric Platform

Foundation: OneLake unifies the data estate



Foundation: Define Business Semantics



Semantic models are expertly curated repositories of business data and corporate metrics

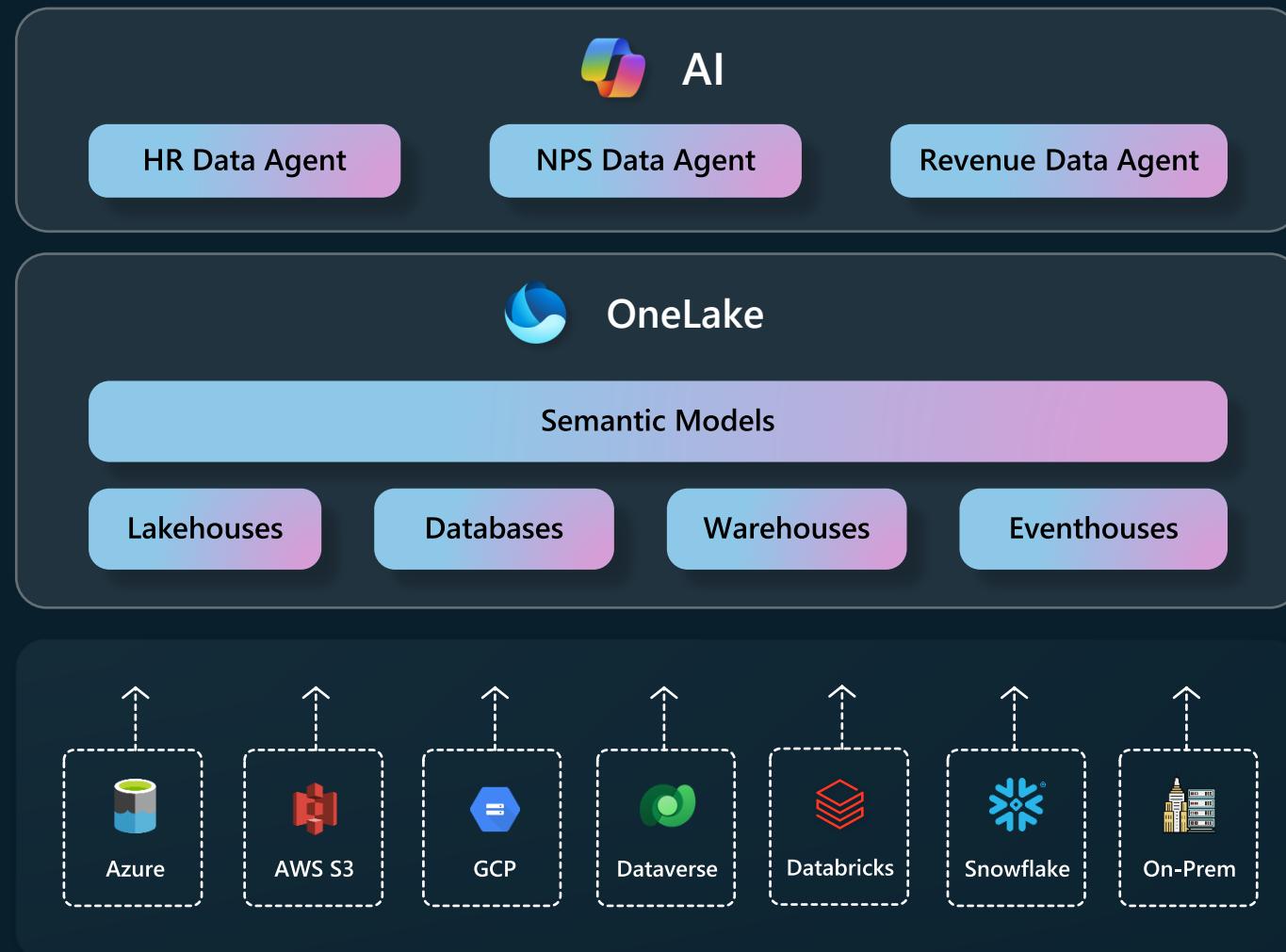
Industry rush towards semantic models as key AI enablers



30M MAU are regularly using 10+ million of PBI semantic models

The market footprint of PBI semantic models gives Microsoft significant leg up

Foundation: OneLake unifies the data estate



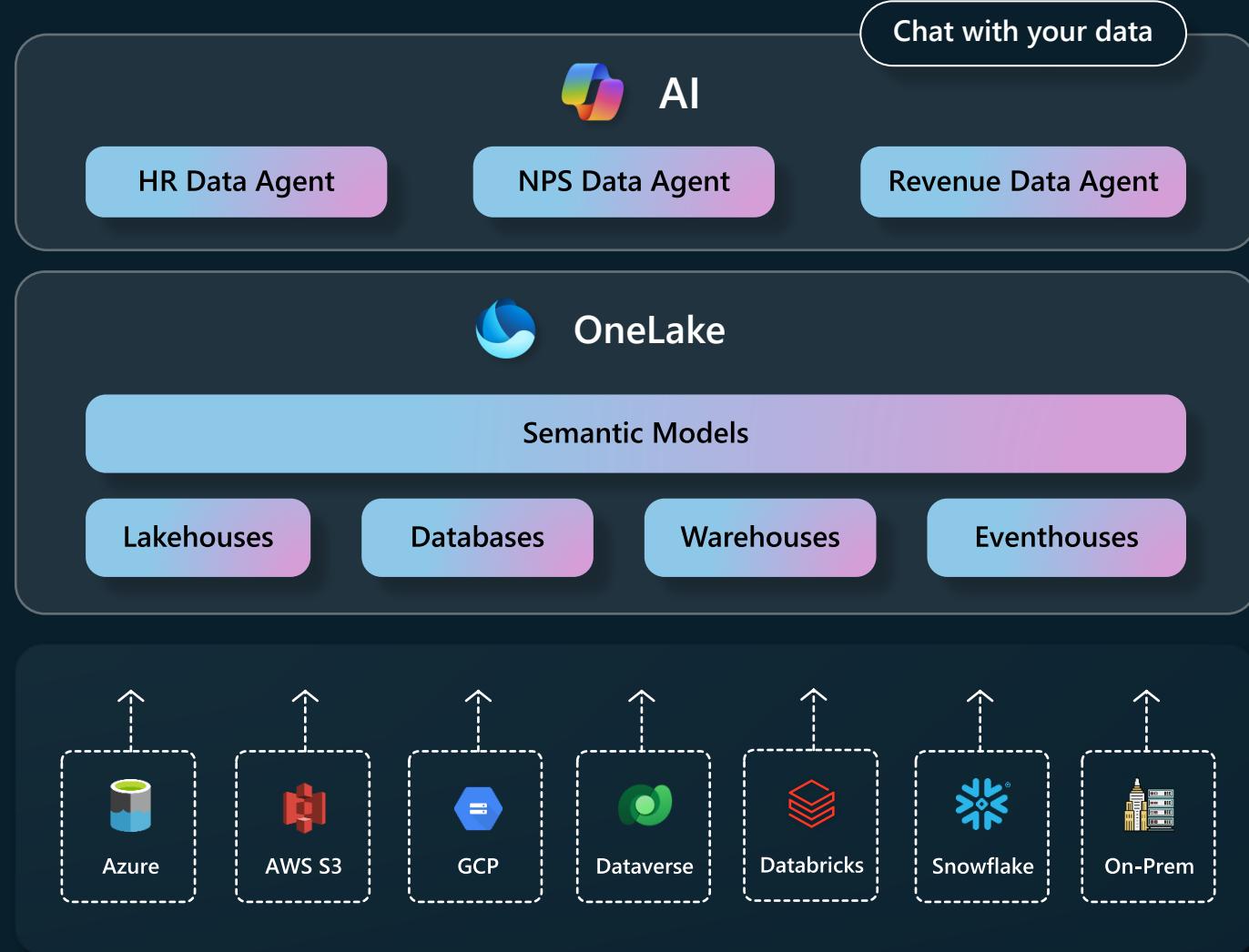
Data Agents are analytical agents that have general ability to author queries and run analysis

They are provided with a source-specific “operator’s manual” on how to properly query and analyze the data

Includes instructions for when to use what data, how to understand questions, what are well known answers to common inquiries, multi-shot examples (Training your own Copilot)

The Data Agent can run simple queries or perform complex multi-step analysis

Foundation: OneLake unifies the data estate

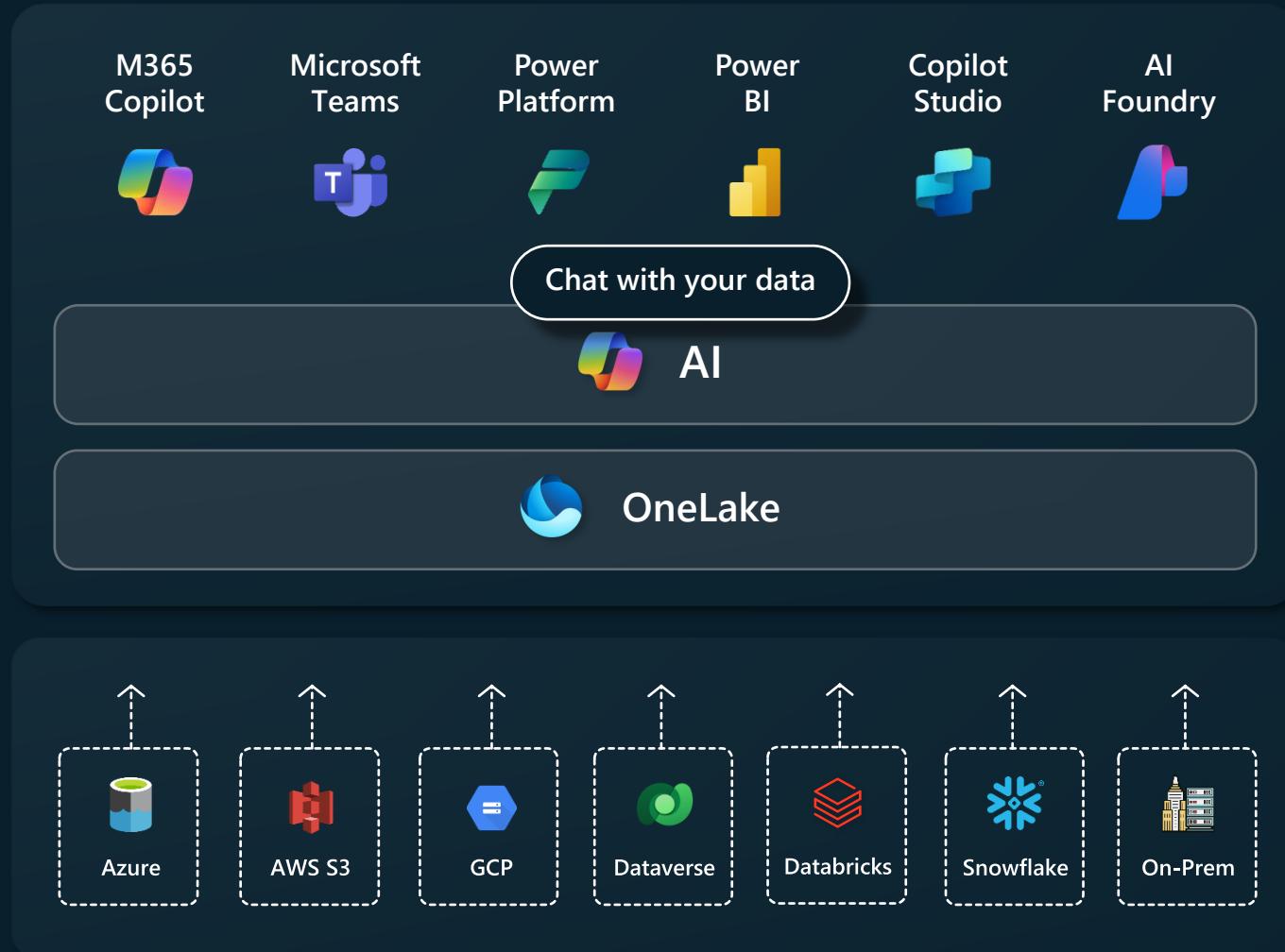


A “Chat with your data” REST endpoint allows users and apps to submit NL data questions

Fabric will determine which data to base the answer on, based on the user permissions and usage patterns

Answers will be served from Data in OneLake using the matching Data Agent

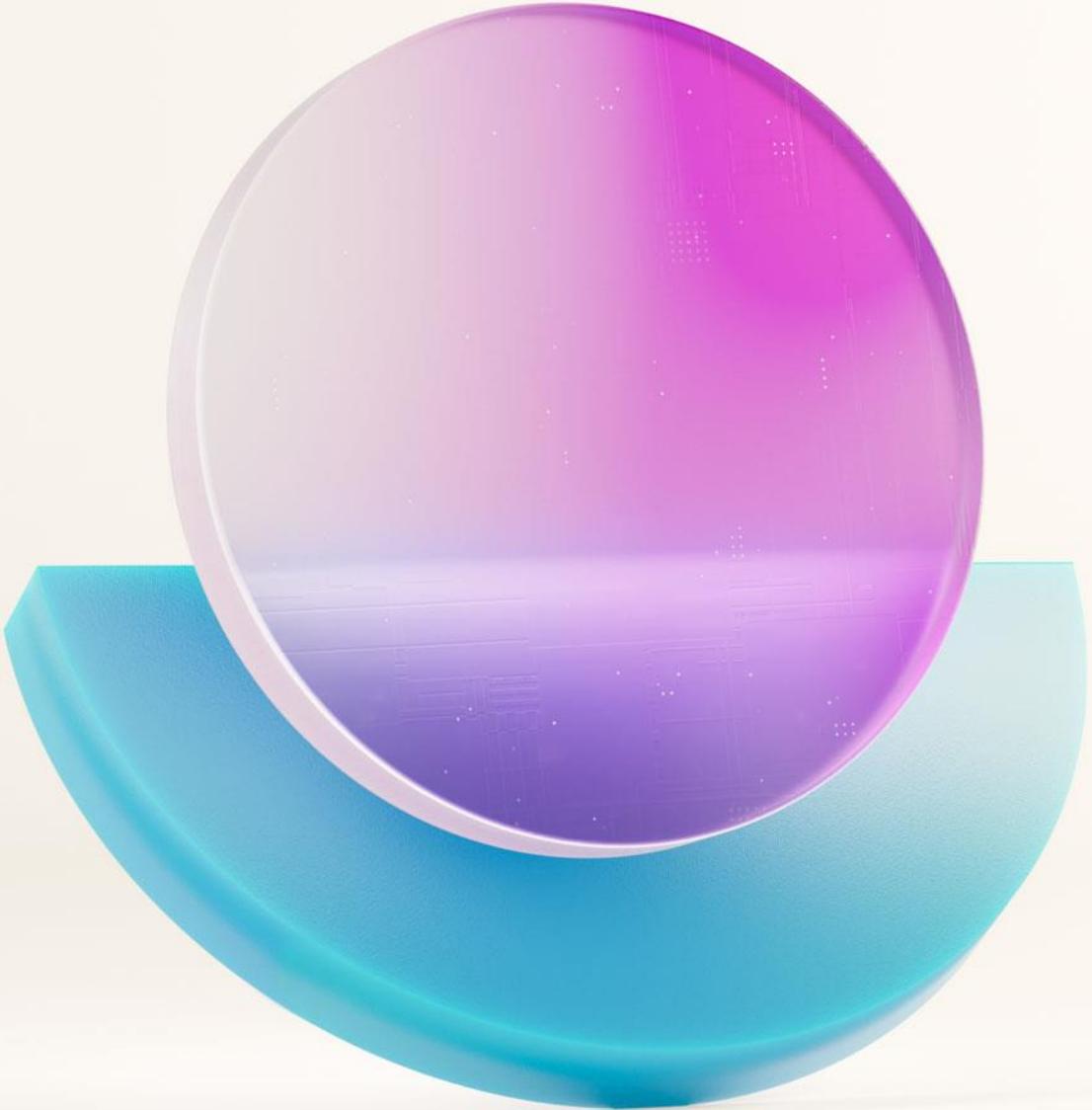
Integrated in M365 ++



The ability to converse with the data is going to be available in M365 apps and Copilot, Power Platform, and Foundry

Power BI Home will provide enhanced graphical experience (not avail yet in M365 due to platform limitations)

Open Question: Should this capability be integral part of the M365 Copilot product (ala PBI in E5)?



Access Control

What determines who can use
Copilot in Fabric?

Tenant Settings

Control through Security Groups

Often scoped to specific ones

Capacity Region is key, not Tenant (Home) Region

See: Data Residency

Users can use Copilot ..

Controls Copilot in Fabric, Data Agents, and AI Functions

Data sent to Azure OpenAI can be processed ..

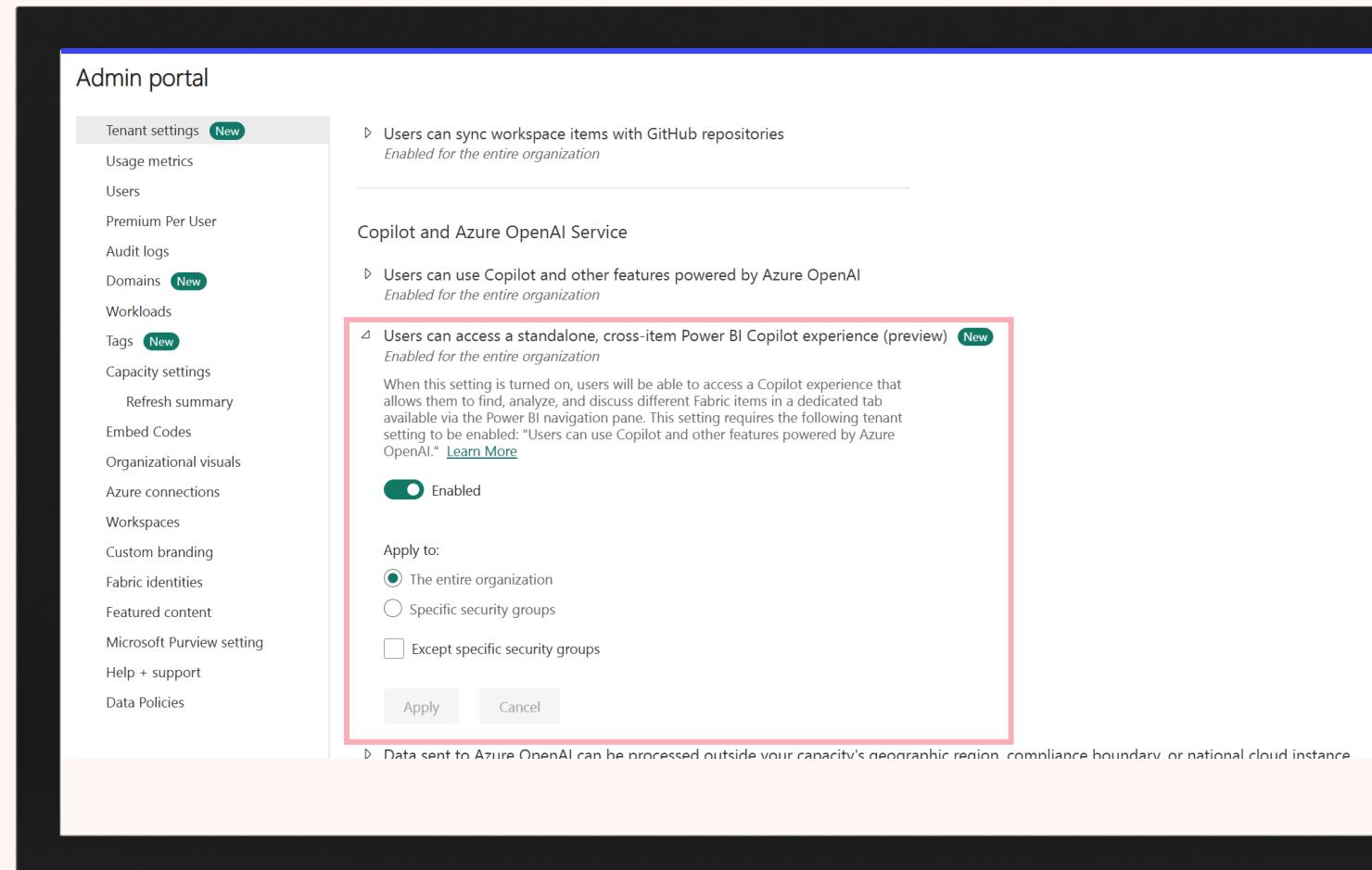
Applies to all skills & experiences

Data sent to Azure OpenAI can be stored ..

Only applies to Notebooks, Data Agents

Stores conversation history

8



Capacities

Paid capacities (P || F) only

Delegated Setting to configure finer grain

Fetch Overview through API ([link](#))

No option to restrict delegation to Capacity Admins

Control & Data Plane still determine whether someone can use the data powered by this capacity

This does **not** block the usage of Copilot for data hosted on this capacity!

The screenshot shows the Microsoft Fabric Admin portal interface. At the top, there's a navigation bar with 'Microsoft Fabric' and a search bar. Below the navigation bar, the main content area has a sidebar on the left with various options like 'Tenant settings', 'Usage metrics', 'Users', etc., and a 'Capacity settings' option which is highlighted with a red box. The main content area is titled 'Admin portal' and contains a list of features with their status. A red box highlights the 'Delegated tenant settings' section under the 'Microsoft Fabric' heading.

Category	Setting	Status
Microsoft Fabric	Users can create Fabric items	Enabled for all users in capacity
	Users can create and use ADF Mount items (preview)	Disabled for all users in capacity
	Users can create Healthcare Cohort items (preview)	Disabled for all users in capacity
	SQL database (preview)	Enabled for all users in capacity
	Digital Twin Builder (preview)	Enabled for all users in capacity
	Mirrored Azure Databricks Catalog (preview)	Enabled for all users in capacity
	Users can create variable libraries (preview)	Enabled for all users in capacity
	Audit and usage settings	
	Workspace admins can turn on monitoring for their workspaces (preview)	Enabled for all users in capacity
	Copilot and Azure OpenAI Service	
Users can use Copilot and other features powered by Azure OpenAI	Enabled for all users in capacity	

Control Plane

Workspace Permissions (Roles)

Viewer

Implicit **Read** on items hosted in workspace
“Consumer” Copilot skills will work (Power BI)
Summarize, Data Q&A, ...

Contributor/Member/Admin

Implicit **Build/Write** on items hosted in workspace
Creator Copilot Skills will work
Create a Page, Visual, ..

If allowed to create Fabric Items ([link](#))
“Non-Power BI” Copilot skills will work
Notebooks, Dataflows Gen 2, SQL, ..

Item Permissions (Share)

Explicit **Read** on item level
“Consumer” Copilot skills will work (Power BI)
Summarize, Data Q&A, ...
Can also give Explicit **Build/Write** on item level
Can use Creator skills
Create a Page, Visual, ..
If allowed to create Fabric Items ([link](#))
“Non-Power BI” Copilot skills will work
Notebooks, Dataflows Gen 2, SQL, ..
Needs to be able to create/edit items in a workspace!



Data Plane

"Copilot is insecure because it bypasses permissions ?!"

Actions and results are determined by:

Entra Identity of the user

Pay attention when using a delegated model (i.e. Semantic Model in Import Mode)

Tenant/Capacity configuration

Control Plane permissions

Read/Build/Write

Data Plane permissions

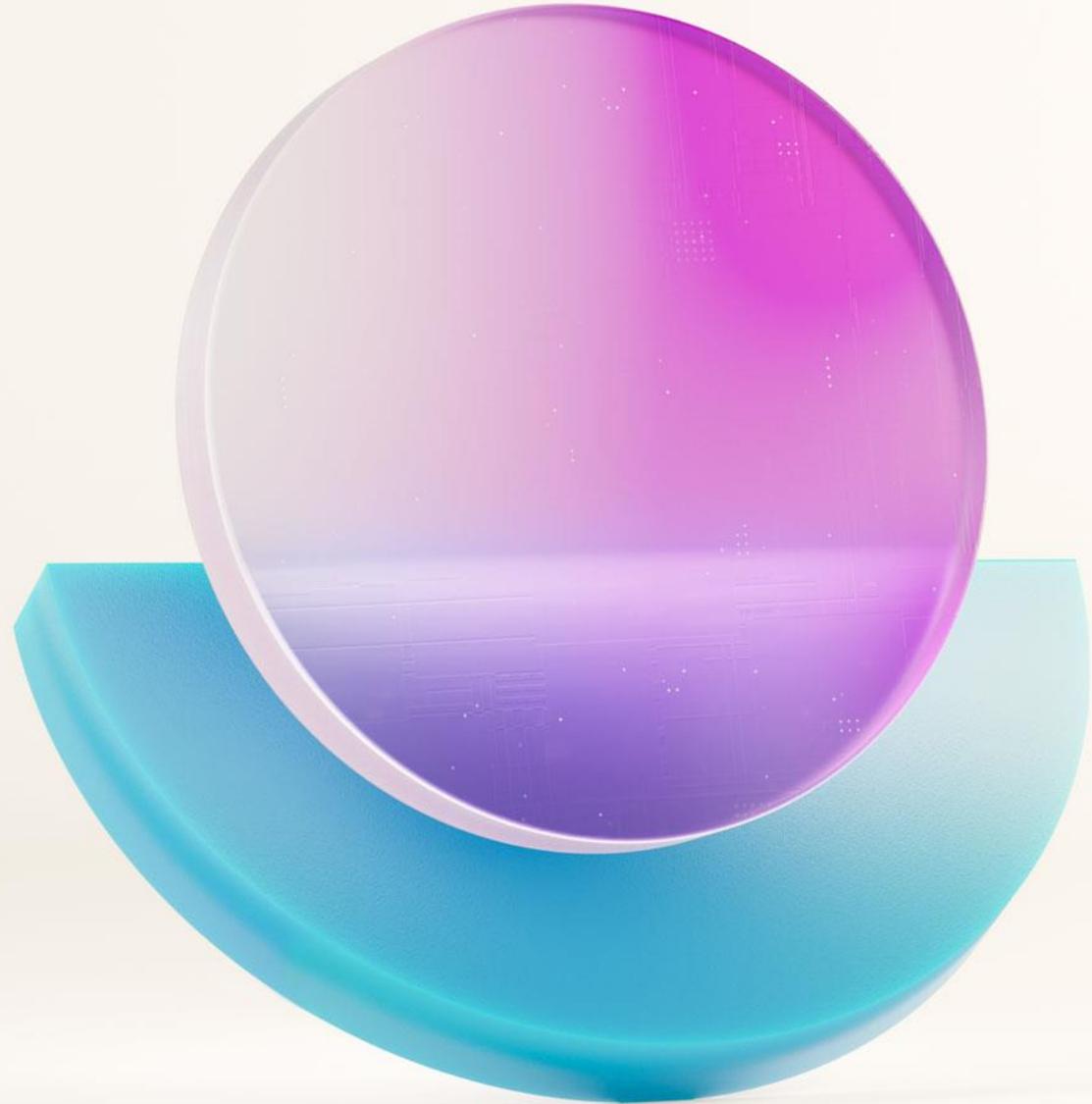
RLS/OLS/..

In *reality*:

Plenty of semantic models and reports *obfuscate* things from users, depending on **Build** permissions

Copilot *exposes* all items with read permissions

What will OneLake Security bring?



Data Residency

Data Residency

- “Where does my data go?”
 - Determined by Capacity Region & Tenant Settings ([link](#))

Geographic area where your Fabric Capacity is located	Geographic area where Azure OpenAI Service is hosted	Data processing outside your capacity's geographic region?	Actions required to use Fabric Copilot
US	US	No	Turn on Copilot.
EU Data Boundary	EU Data Boundary	No	Turn on Copilot.
UK	EU Data Boundary	Yes	Turn on Copilot. Enable cross-geo data processing.
Australia Brazil Canada India Asia Japan Korea South Africa Southeast Asia United Arab Emirates	US	Yes	Turn on Copilot. Enable cross-geo data processing.

- “Does my data get stored?”
 - No actual data points get stored
 - Even with initial behaviour of only storing prompts (Abuse Monitoring)
 - No longer applies! ([March 2024 Power BI Update](#))

Data Residency

"What data does Copilot in Fabric actually use?"

It depends .. 

Metadata, unless instructed by a user (grounding process)

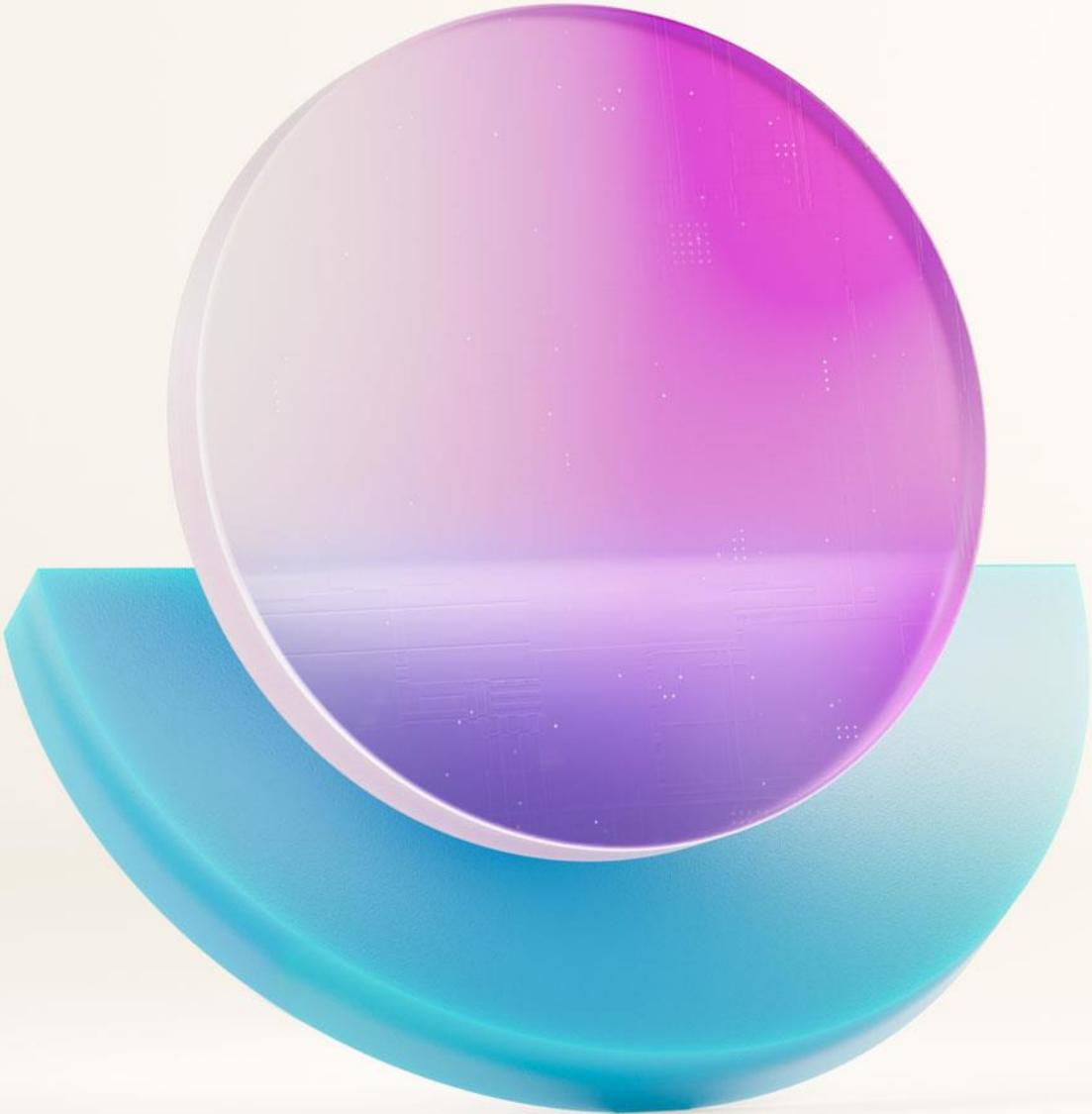
Prompts get sent, so whatever a user puts in ..

Revise "Responsible use in ..", "Data use in .." (i.e. Power BI) for specific guidance on Skills/Agents

Copilot for Power BI leverages existing functionalities (Analyze, Q&A, ..) to the maximum

Copilot in Fabric can use data in *session* (*query results, attached resources*)

Copilot in Fabric, Data Agents, AI Functions all adhere to the Responsible AI Standard



Capacity Consumption

Capacity Estimation

"How can I estimate what Copilot will cost us?"

Mission impossible, unless you're running representative tests

Community Example of Estimator for *tokenization* ([link](#))

Fabric/Power BI Capacities all use CU (Capacity Units)

Azure OpenAI token usage (input & output) is converted to CU ([docs](#))

Pricing Example, explaining token usage ([link](#))

See also:

[Saying 'please' and 'thank you' to ChatGPT costs OpenAI millions in energy bills](#)

[What are tokens and how to count them](#)

Azure OpenAI models are constantly tuned, tweaked, and optimized

Balance of cost, accuracy, performance

<https://blog.crossjoin.co.uk/2024/03/17/how-much-does-copilot-cost-in-microsoft-fabric/>

https://databear.com/understanding_microsoft_fabric_and_copilot_costs/

Capacity Estimation

Operation in Metrics App	Description	Operation Unit of Measure	Consumption rate
Copilot in Fabric	The input prompt	Per 1,000 Tokens	100 CU seconds
Copilot in Fabric	The output completion	Per 1,000 Tokens	400 CU seconds

<https://learn.microsoft.com/en-us/fabric/fundamentals/copilot-fabric-consumption>

Capacity Consumption

"How much is Copilot in Fabric actually costing us?"

In most cases, Copilot requests use > 0.1% of F64 capacity

Caching is used to minimize requests to Azure OpenAI, reducing CU consumption

Fabric Roadmap ([link](#)) has entries for:

[Capacity Metrics Chargeback Public Preview](#) (Q3 2025)

[Capacity Utilization Events Public Preview](#) (Q4 2025)

Capacity Consumption

Capacity Metrics App ([link](#)) is the reference

“Copilot in Fabric”, and “AI Query” (AI Functions) operations

Background Operations get smoothed across 24 hours

For Power BI, usage actually gets allocated to the report! 

Be mindful of virtual items “Power BI Session Service”, “Power BI Session Desktop”

“Power BI Session Service” is used with unsaved reports

“Power BI Session Desktop” is all usage from Desktop

Usage gets lumped together in sessions of 60 seconds

Background operations for timerange												Select optional column(s):		Multiple selection:	
Workspace	Item kind	Item name	Operation	Start	End	Status	User	Duration (s)	Total CU (s)	Timepoint CU (s)	Throttling (s)	% of Base capacity	Billing type	Smooth	
Real-Time Intellige...	KustoQuer...	USGS_EH_queryset	Copilot In Fabric	5/20/2025 9:26...	5/20/2025 9:27....	Success	sujos...	240	270.2000	0.0938	0	0.00%	Billable	5/20/2025	
BDJ_CopilotTest	Report	BeerTasting_May2024	Copilot In Fabric	5/20/2025 9:49:...	5/20/2025 9:50:...	Success	benn...	120	592.7000	0.2058	0	0.01%	Billable	5/20/2025	
BDJ_CopilotTest	Report	Power BI Session Desktop	Copilot In Fabric	5/20/2025 10:09...	5/20/2025 10:10...	Success	benn...	60	527.5000	0.1832	0	0.01%	Billable	5/20/2025	
BDJ_CopilotTest	Report	Power BI Session Desktop	Copilot In Fabric	5/20/2025 10:12...	5/20/2025 10:13...	Success	benn...	120	1,060.9000	0.3684	0	0.02%	Billable	5/20/2025	
BDJ_CopilotTest	Report	Power BI Session Desktop	Copilot In Fabric	5/20/2025 10:13...	5/20/2025 10:14...	Success	benn...	60	702.3000	0.2439	0	0.01%	Billable	5/20/2025	
BDJ_CopilotTest	Report	Power BI Session Desktop	Copilot In Fabric	5/20/2025 10:14...	5/20/2025 10:15...	Success	benn...	120	337.1000	0.1170	0	0.01%	Billable	5/20/2025	
BDJ_CopilotTest	Report	Power BI Session Desktop	Copilot In Fabric	5/20/2025 10:15...	5/20/2025 10:16...	Success	benn...	120	635.1000	0.2205	0	0.01%	Billable	5/20/2025	
BDJ_CopilotTest	Report	Power BI Session Desktop	Copilot In Fabric	5/20/2025 10:19...	5/20/2025 10:20...	Success	benn...	60	67.6000	0.0235	0	0.00%	Billable	5/20/2025	
BDJ_CopilotTest	Report	Power BI Session Desktop	Copilot In Fabric	5/20/2025 10:20...	5/20/2025 10:21...	Success	benn...	300	395.4000	0.1373	0	0.01%	Billable	5/20/2025	
Total								2,940	17,055.30...	5.9220	0	0.31%			

Copilot and AI
enabled across
all paid SKUs

April 30th 2025



Copilot and AI
experiences on F2+

F64+ SKU requirement for
Copilot and AI capabilities
has been removed
(April 30th)

Customers on F2+ are
able to access Copilot
in Fabric, data agents,
AI functions

Enable everyone in your org to use Copilot and manage its cost

Enable everyone to use Copilot

- All users can use Copilot experiences
- Consumption of Copilot goes to only the selected capacity

Select who can use a Copilot capacity

- Select the Users or groups who use a specific Copilot capacity
- A user can have only one Copilot capacity
 - Newest one matters..

No longer just P & F SKUs

- Pro, Premium Per User, and Trial

Tenant Setting

- Restrict who can configure
- "Capacities can be delegated .."

△ Copilot capacity
Unapplied changes
Turn on this setting to designate this capacity as a Fabric Copilot capacity. Copilot capacities are special capacity types that allow your organization to consolidate users' Copilot usage and billing on a single capacity. Copilot capacities may not be available in all regions. [Learn more](#)

Select the users or user groups who can use this capacity for their Copilot usage and billing.

Apply to:

- The entire organization
 Specific users or groups

Clear all

 teamSite1  teamSite2

Apply

Discard

▷ Contributor permissions

Disabled for the entire organization

▷ Admin permissions

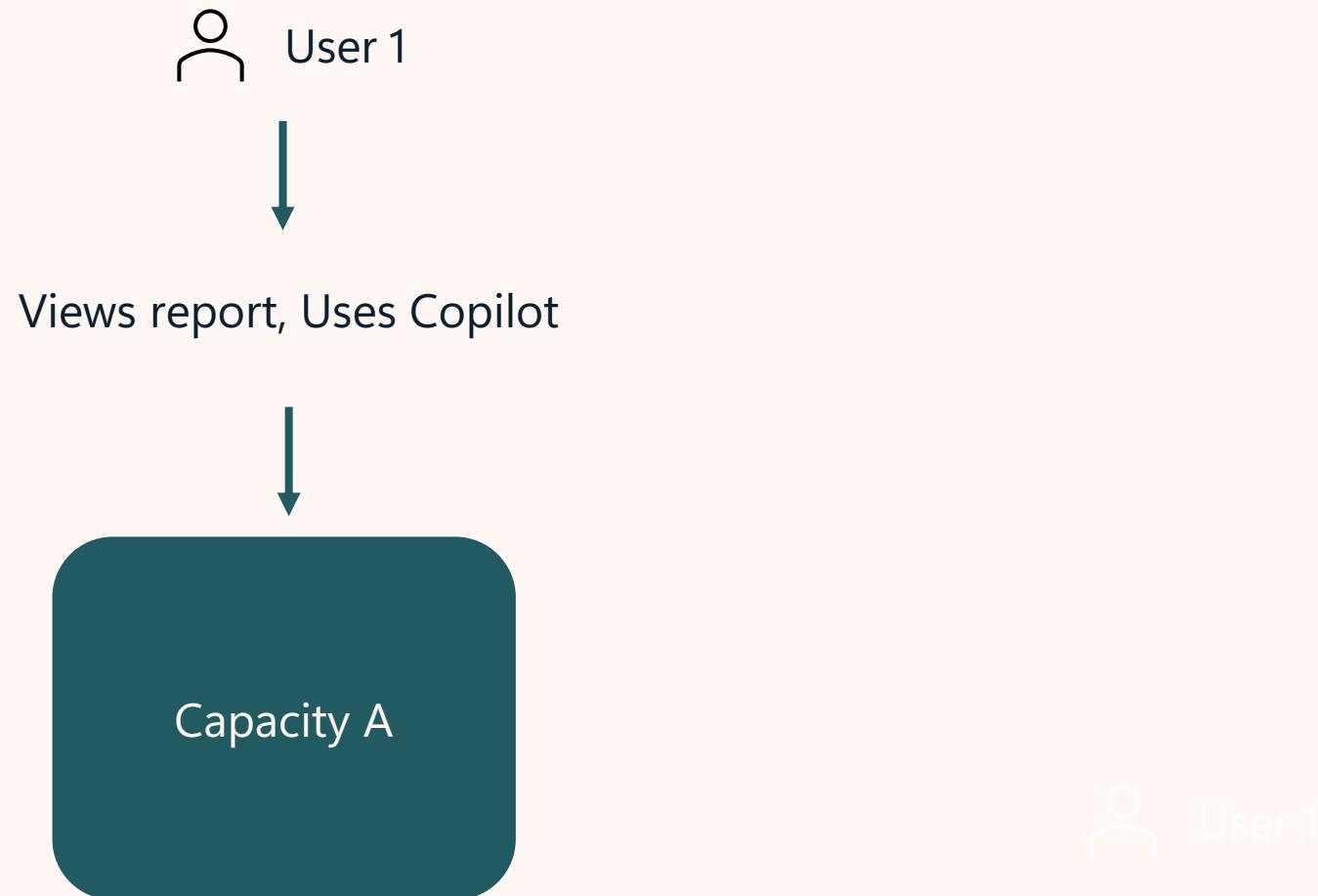
▷ Power BI workloads

▷ Preferred capacity for My workspace

Fabric Copilot capacity

Available since Nov 2024

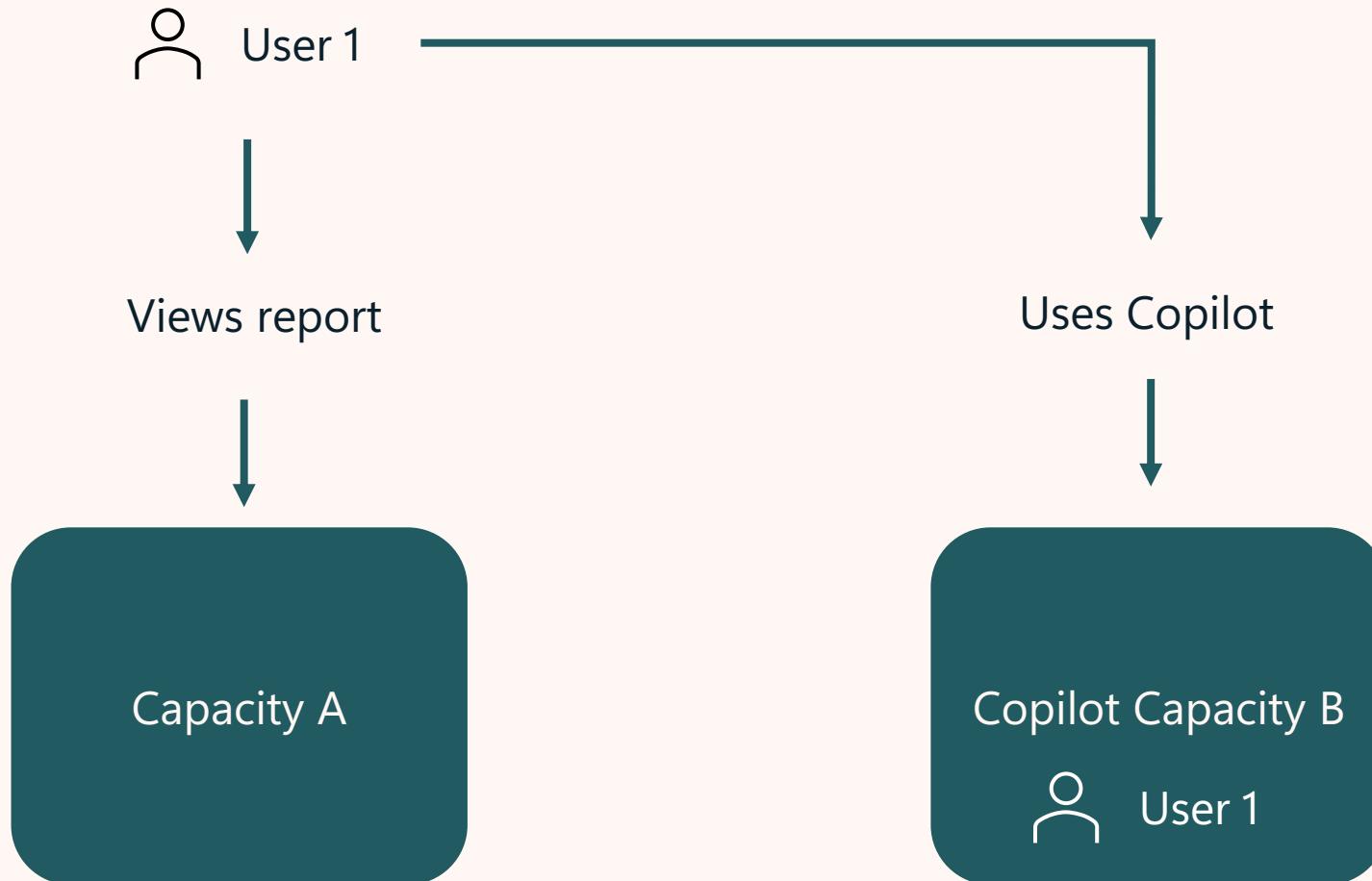
Normally, copilot usage applies to the capacity the content is in.



Fabric Copilot capacity

Available since Nov 2024

After a user is added to a copilot capacity, the user's copilot usage is consumed from their copilot capacity



Protecting your capacity from Copilot usage

Copilot in Fabric operations are background, so no immediate spikes

But when they do .. it has a 24h impact

Be mindful of who has access to Copilot skills and educate!

Copilot requests trigger other operations too!

Track usage for Power BI Desktop, ensuring usage doesn't interfere with key workloads

-  Daily check for “Power BI Session Desktop” item name in Metrics App
 - Any workspace with permissions (Contributor), on Capacity that allows Copilot usage
 - If user is assigned a Copilot Capacity, it automatically goes here

Protecting your capacity from Copilot usage

Options to ensure the health of your capacity

Fabric Copilot Capacity enabled for user base (by region, department, ..)

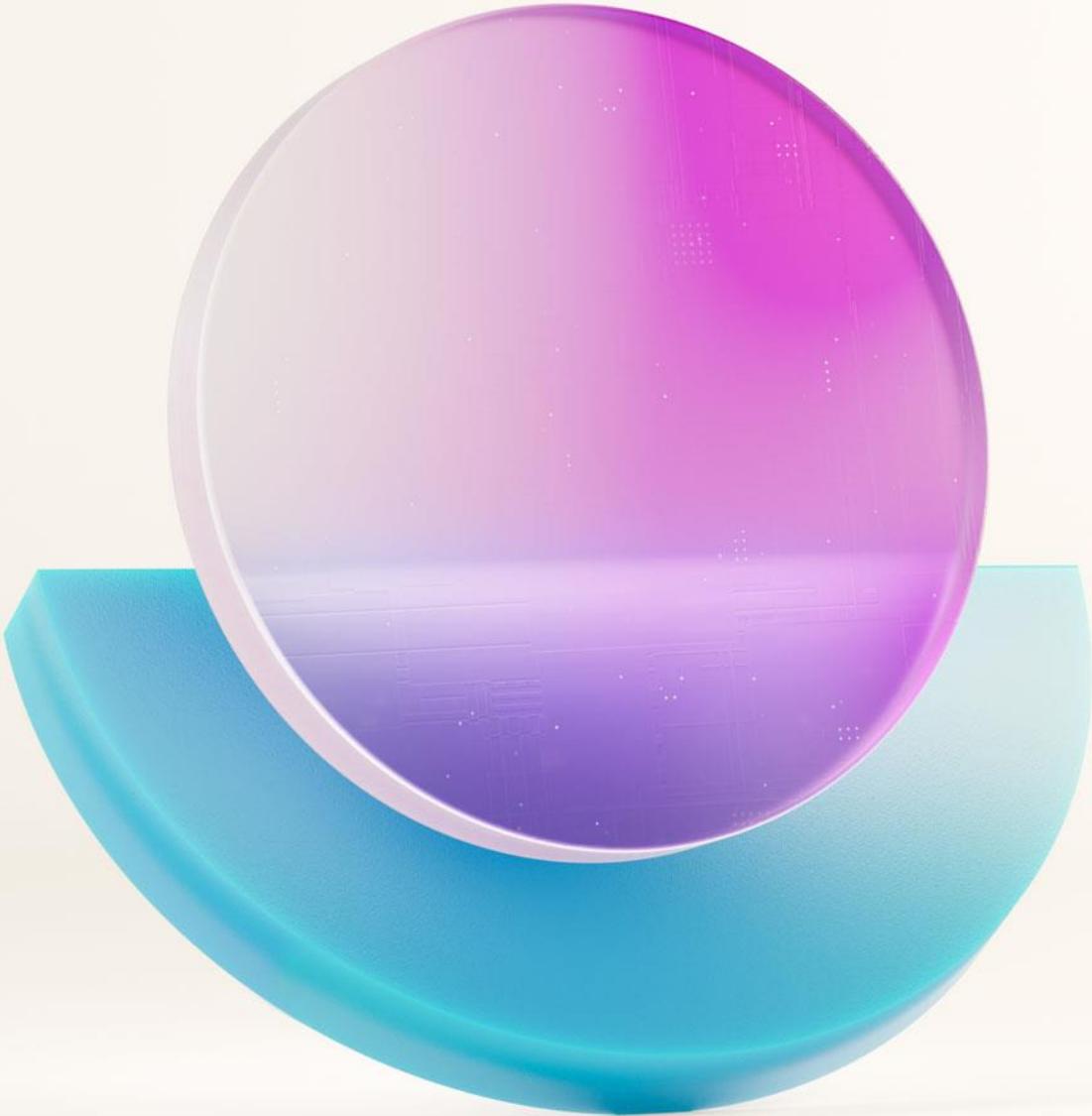
If possible, set up new Security Groups (avoid cross pollination)

When Capacity throttles/rejects, Copilot no longer works

But everything else does .. 

Leverage Surge Protection to provide a limit on the background rejection threshold

Microsoft Fabric
Community Conference



Audit Logs

Audit Logs

Whenever a user performs an action, an audit log entry is created
Can be viewed through:

Purview Audit ([docs](#))

Admin Monitoring Workspace, Feature Usage and Adoption report ([docs](#))

Power BI Activity Log ([docs](#))

We're interested in these events:

Interacted with Copilot (**CopilotInteraction**)

Legacy events

Requested OpenAI model in ML workload (RequestOpenAI)

Requested Copilot features in Fabric (RequestCopilot)

Does not provide the granularity of the specific Skill/Agent used

Viewing Prompts

"Can I see what my users are asking Copilot?"

Natively in Fabric, there is no option to review prompts

Purview DPSM (Data Posture Security Management) for AI does!

Announced in Public Preview at FabCon Vegas 2025

Requires separate licensing for Purview! ([docs](#))

Collection Policy "DSPM for AI - Capture interactions for Copilot experiences"



Home

DSPM for AI

Overview

Recommendations

Reports

Data assessments PREVIEW

Policies

Activity explorer

Activity explorer

Review AI activity including AI interactions (prompts and responses), activity with sensitive info types, and more.

Activity: All values Timestamp: All values App: All values Workload: All values User: Edited value X Sensitive info type: All values X User risk level: All values X Files referenced: All values XSensitive files referenced: All values X● AI interaction ● Sensitive info types ● AI website visit

Chart time zone: (UTC-7:00)

21 items

Filter ▼

Filter by keyword

Activity type	User	Timestamp	AI app category	App	App accessed in	Sensitive info types	Resources accessed	Sensitive files referenced
AI interaction	Mona Kane	Feb 16, 2025 3:24 PM	Microsoft Copilot exper...	Copilot for PowerBI (Co...	PowerBI	No	No	No
AI interaction	Mona Kane	Feb 16, 2025 3:25 PM	Microsoft Copilot exper...	Copilot for PowerBI (Co...	PowerBI	Yes	No	No
Sensitive info types	Mona Kane	Feb 16, 2025 4:35 PM	Microsoft Copilot experien...	Copilot for PowerBI (Co...	PowerBI			
AI website visit	Dean Renzo	Feb 16, 2025 5:26 PM	Microsoft Copilot experien...	Microsoft 365 Copilot	Word			
AI interaction	Dean Renzo	Feb 16, 2025 5:34 PM	Microsoft Copilot exper...	Microsoft 365 Copilot	Word			
AI interaction	Edison Gil	Feb 16, 2025 5:35 PM	Microsoft Copilot exper...	Security Copilot	Purview			
AI interaction	Posie Par	Feb 16, 2025 5:36 PM	Microsoft Copilot exper...	Microsoft 365 Copilot	Word			
AI interaction	Edison Gil	Feb 16, 2025 5:38 PM	Microsoft Copilot exper...	Security Copilot	Purview			
AI interaction	Dean Renzo	Feb 16, 2025 6:28 PM	Microsoft Copilot experien...	Security Copilot	Purview			
AI interaction	Edison Gil	Feb 16, 2025 6:28 PM	Microsoft Copilot experien...	Copilot for PowerBI (Co...	PowerBI			



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DSPM for AI

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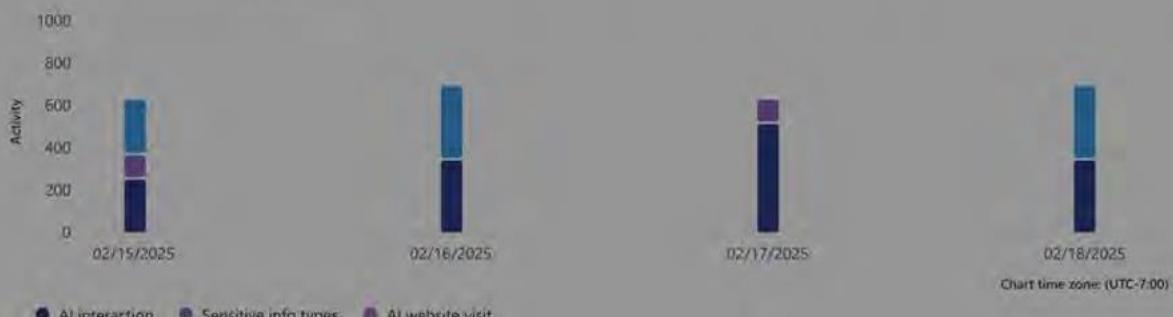
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AI interaction	Edison Gil	Feb 16, 2025 6:28 PM	Microsoft Copilot experien...	Copilot for PowerBI (Co...	PowerBI

AI interaction

Activity details

Activity	Timestamp
AI interaction	Feb 16, 2025 3:24 PM
Record Id	Client IP
aa1a22eb-ed9d-486595db-c9e8140d86e4	89.109.147.78

User details

Mona Kane Mona.Kane@contoso.com	User risk <small> ⓘ</small> ■■■ High
---	---

View more user details in Insider Risk Management ↗

App details

AI app category	App	App accessed in
Microsoft Copilot experiences	Copilot for PowerBI (Copilot in Fabric)	PowerBI

Interaction details

Prompt

Summarize the hiring trend and find the which group has the most bad hires and their demographics

 ⓘ Sensitive info types detected View related activity



Home



DSMP for AI



Overview



Recommendations



Reports



Data assessments PREVIEW



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Sensitive info type: All values

Sensitive files referenced: All values



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AI interaction

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Record Id	aa1a22eb-ed9d-486595db-c9e8140d86e4
Client IP	89.109.147.78

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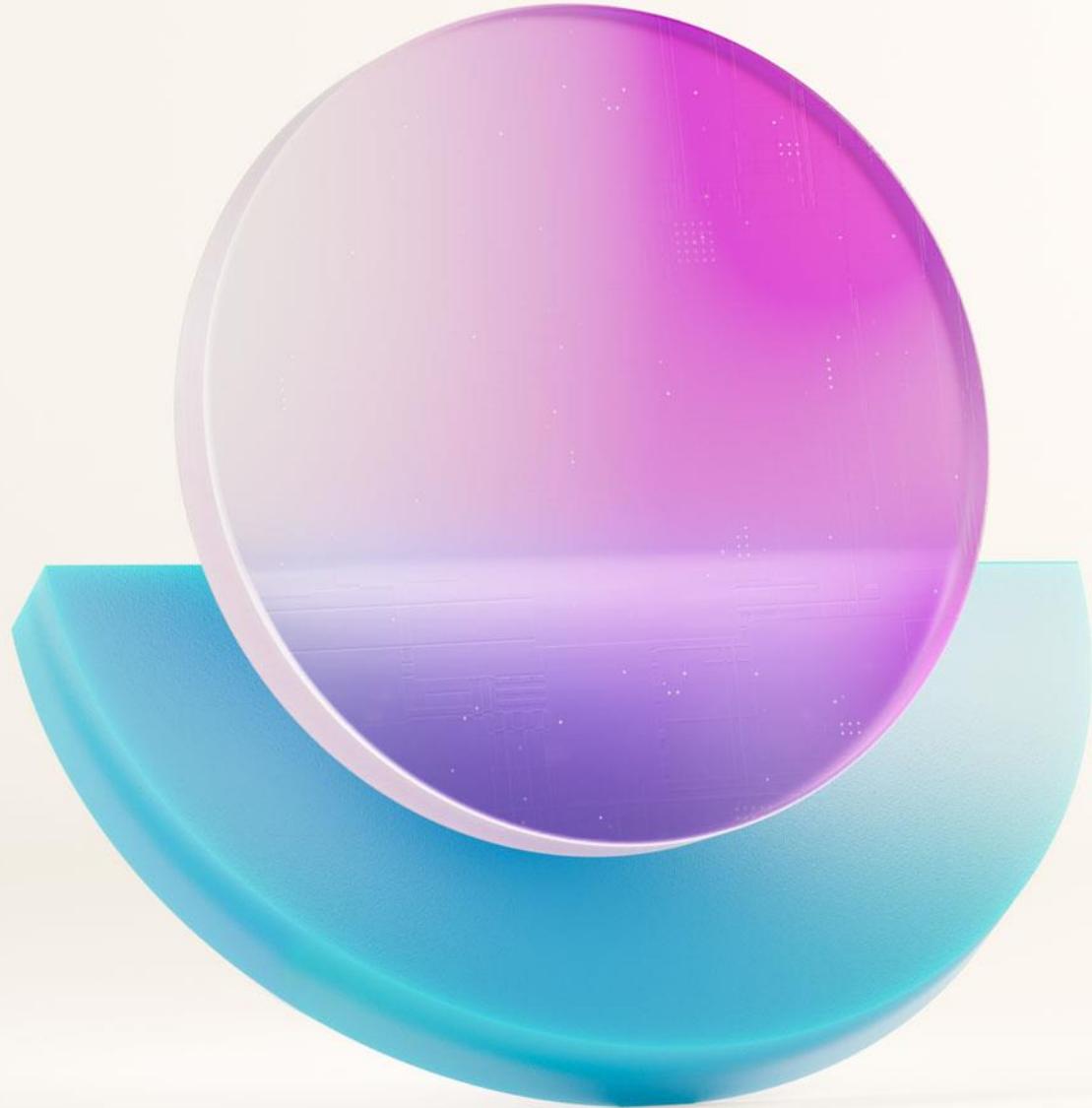
App details

AI app category	Microsoft Copilot experiences
App	Copilot for PowerBI (Copilot in Fabric)

Interaction details

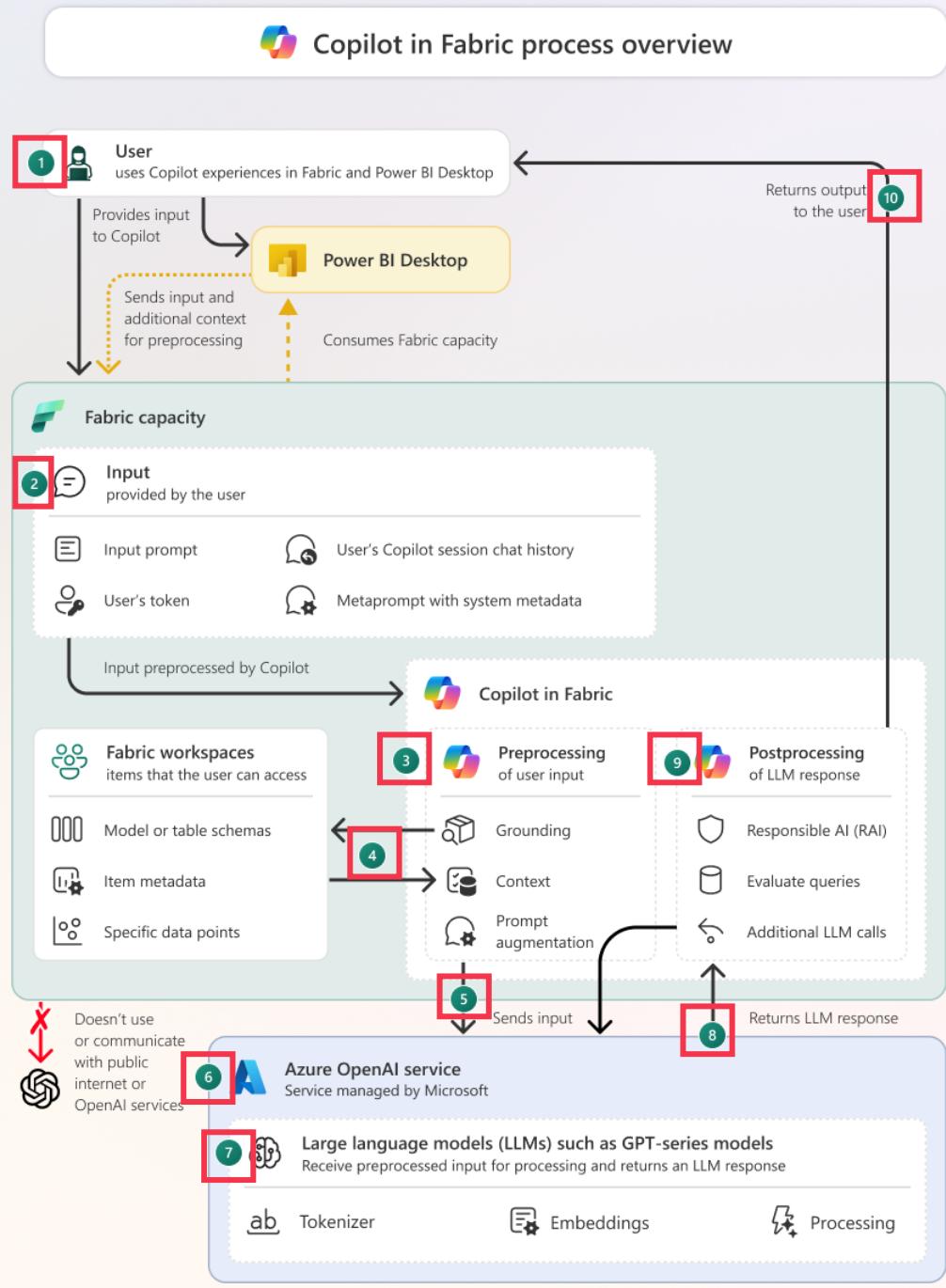
Response

Hiring Trends 1: Over 2014, part-time hiring significantly outpaced full-time hiring, with 17,715 part-time hires compared to 992 full-time hires^{[^](#cite:///hts1)}. Monthly hiring peaked for part-time roles in September (2.13K hires)^{[^](#cite:///er11)}, while full-time hiring was highest in May (139 hires)^{[^](#cite:///er11)}. 2. Demographically, most new hires were under the age of 30, comprising 13.19K total hires (6.36K males, 6.83K females)^{[^](#cite:///er41)}. Female hires slightly exceeded male hires^{[^](#cite:///er41)}. ### Regional and Ethnic Analysis 1. Group A led new hires across all regions, totaling 12.37K hires^{[^](#cite:///er61)}. Regions such as the Northwest and Midwest had particularly high Group A hiring, totaling 2.25K and 2.07K hires, respectively^{[^](#cite:///er61)}. 2. Recruiting efforts in the East focused less on Group A demographic^{[^](#cite:///er61)}. ### Bad Hiring Trends 1. Group A also accounted for the most bad hires, with 3.53K incidences^{[^](#cite:///er31)}. Regions contributing most notably included the Northwest (716 bad hires) and North (632 bad hires)^{[^](#cite:///er31)}. 2. Younger demographics (<30) experienced the highest percentage of bad hires relative to active users at 20.90%^{[^](#cite:///er51)}.



Copilot for Power BI

How it works



Step 1: User provides input to Copilot (prompt)

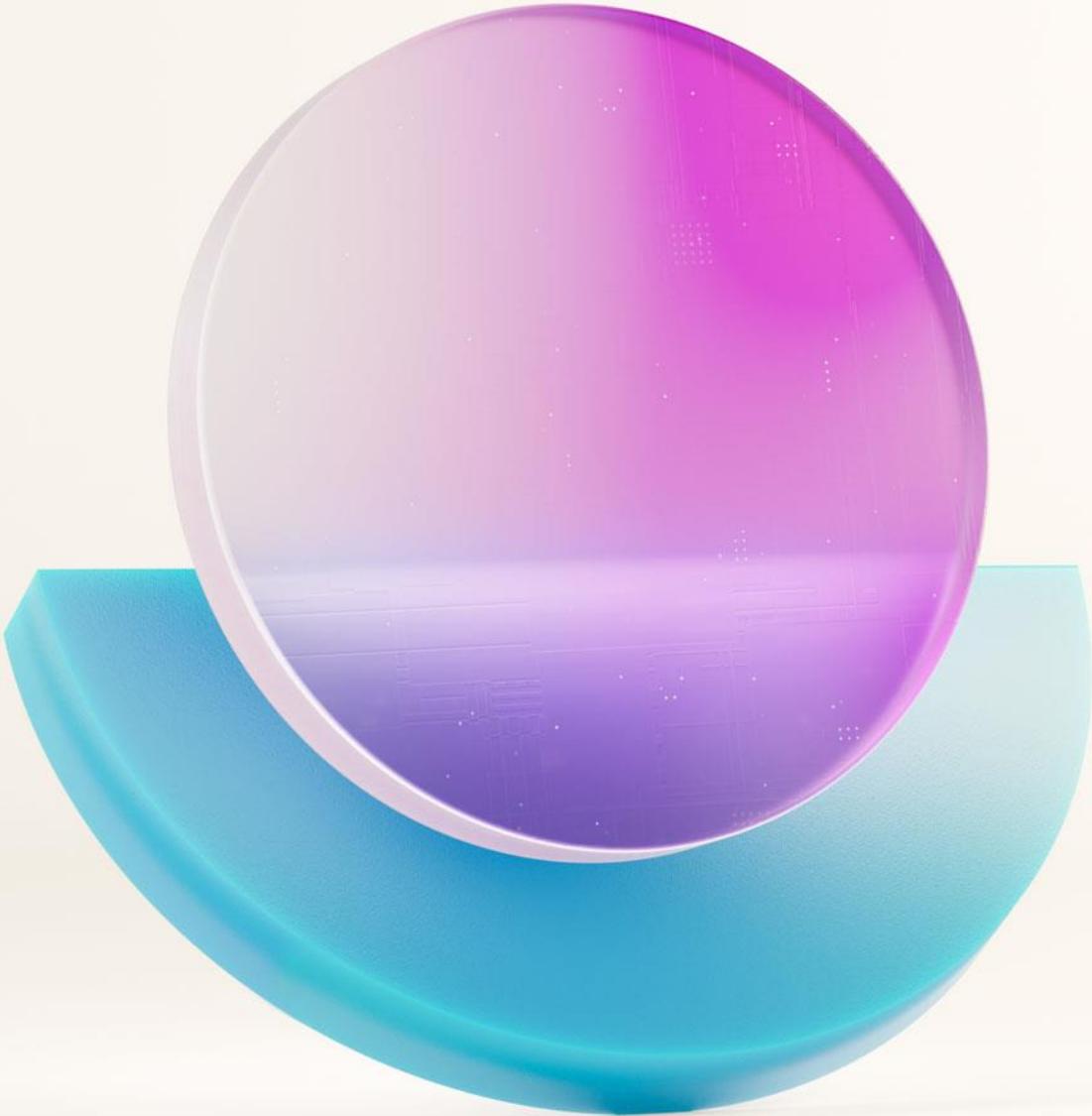
Step 2: Copilot preprocesses the input (grounding)

Step 3: Azure OpenAI processes the prompt and generates an output

Step 4: Copilot performs postprocessing on the output

Step 5: Copilot returns the output to the user

Livestream – How it works
Docs – How it works



User Education

Prepping Copilot to work best for your data

To optimize "Chat with your Data" quality output, authors and consumers need the ability to **ground, curate, and configure** their artifacts to work with Copilot.



Select a model schema for Copilot

Schema selection



Ground responses with verified answers

Verified answers



Teach Copilot your organizational terms

Synonyms



Provide additional context about your data

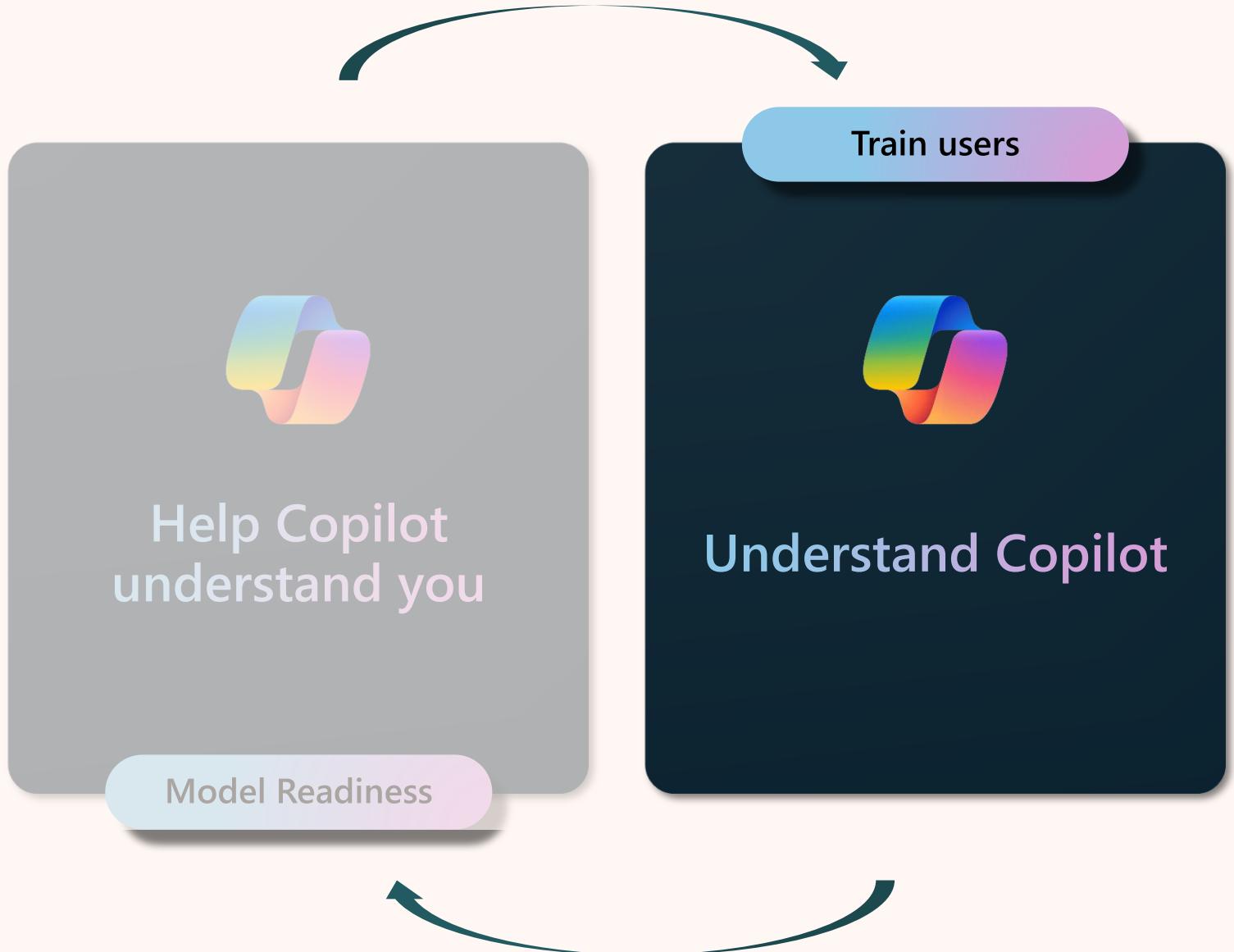
Custom instructions

Optimize for Copilot

Accelerate your
time to insights



What you can
do today



Understand how to use Copilot

Enable Q&A

Allows Copilot to answer questions over your data

Understand limitations

Report > Model
Supported v. unsupported query types

Perfecting questions

Ideal sentence structure

Understand how to use Copilot

Enable Q&A

Allows Copilot to answer questions over your data

Q&A

ⓘ If Q&A is turned on, we'll create an index of your data in the service.[Learn more](#)

Turn on Q&A to ask natural language questions about your data

Share your synonyms with everyone in your org

Apply

Discard



Understand how to use Copilot

Enable Q&A

Table and column
level control

The screenshot shows the Microsoft Copilot Q&A setup interface. On the left, there's a sidebar with options: Q&A setup (selected), Getting started, Synonyms (highlighted in blue), Relationships, Teach Q&A, Review questions, and Suggest questions. The main area is titled "Synonyms" with a sub-section "Expenditure Statistics". It shows a table with columns "Tables and fields", "Approved synonyms", "Suggestions", and "Include in Q&A". Under "Tables and fields", there are two entries: "Expenditure Statistics" and "Arrivals per month". Under "Approved synonyms", there are lists for each table. For "Expenditure Statistics", the approved synonyms are "expenditure statistic" and "statistic". For "Arrivals per month", the approved synonym is "arrivals per month". Under "Suggestions", there are lists of suggested terms: for "Expenditure Statistics" include "spending data", "financial analysis", "expense statistic", "cost analysis", and "spending analysis"; for "Arrivals per month" include "monthly visitor arrivals", "tourist influx per month", "traveler arrivals per month", "visitor arrivals per month", and "incoming tourists each month". Each suggestion has a plus sign to add it to the approved list and an 'x' to remove it. A toggle switch labeled "Include in Q&A" is shown for each table. At the bottom, a note says "This feature is in preview. [Learn more](#)".



Understand how to use Copilot

Report visuals are prioritized over the model information

Copilot limitations

Report response

which ad type has most leads?

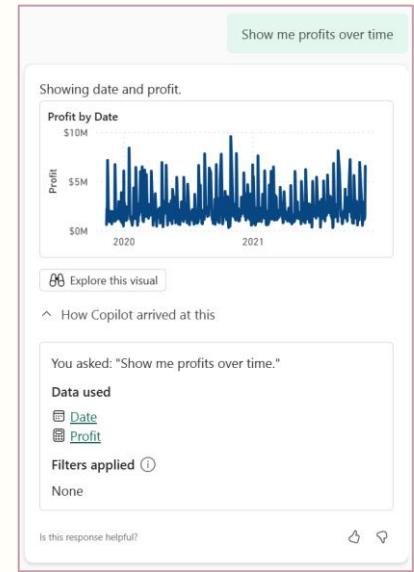
The data shows the number of leads generated by each ad type:

- **Site:** 677.44K leads [1](#)
- **Blogs:** 666.11K leads [1](#)
- **Magazine:** 657.55K leads [1](#)
- **TV:** 599.57K leads [1](#)

Therefore, the ad type that has the most leads is **Site** with 677.44K leads.

Is this response helpful? thumb up thumb down

Model response



Understand how to use Copilot

Copilot limitations



Columns and fields in the report or data model



Explanations, summaries, or “show me” questions

“What were the top 5 selling products in North America last month?”

where product, region, and date are already columns in the data, and Copilot helps with top N filtering to produce the visual.

“Tell me the average price of gasoline per gallon over the last 30 days.”

where price per gallon is a field already contained in the model, and Copilot helps by taking the average and filtering by relative date to produce the visual.



Understand how to use Copilot

Copilot limitations

x

Why questions

x

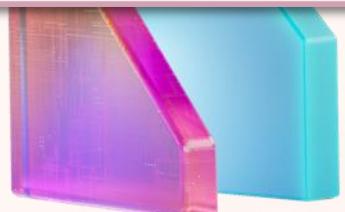
Diagnostic analysis like
root cause or
forecasting

**"How many books do you
think we will sell next year?"**

This question asks for forecasting,
which isn't currently supported

**"Why do our sales go down
every July?"**

This question involves generating
deeper insights beyond the provided
data.



Understand how to use Copilot

Perfecting questions

Ideal sentence structure

1. preferred sort order
2. aggregation on value field by dimension field
3. legend
4. filters
5. visual type

Average ticket sales by movie genre

... grouped by region
... released in 2024

Top 5 movie titles by total ticket sales

... as a column chart





Grounding data for Copilot



Coming Soon: Configuring and grounding data for Power BI Copilot

Verified Answers

Ensure **quality** and **consistency** of responses for the most critical business topics.

Schema Selection

Limit the **scope** of data that Copilot can answer questions about

Custom Instructions

Provide **business context** and help Copilot guide how to talk about your data



Power BI Copilot grounding: Verified Answers

Verified Answers

Ensure **quality** and **consistency** of responses for the most critical business topics.

The screenshot displays a Microsoft Power BI report titled "Traffic Source Analysis". The report contains three main visualizations:

- Treemap:** Shows the distribution of traffic sources. The largest segment is Direct at 233.6M, followed by Bing at 38.9M, AdRoll at 22.6M, LinkedIn at 4.1M, Referral at 2.6M, and Search Engine at 1.1%.
- Total Revenue by Traffic Source:** A bar chart showing revenue in millions. The data is as follows:

Traffic Source	Revenue (\$M)
Search Engine	\$1,114.5M
Google	\$640.0M
Direct	\$556.7M
Referral	\$194.7M
LinkedIn	\$193.1M
Bing	\$127.7M
AdRoll	\$115.5M
- Impression by Quarter:** A line chart showing impressions in millions over four quarters. The data is as follows:

Quarter	Impressions (M)
Qtr 1	58.7M
Qtr 2	54.3M
Qtr 3	62.1M
Qtr 4	58.5M

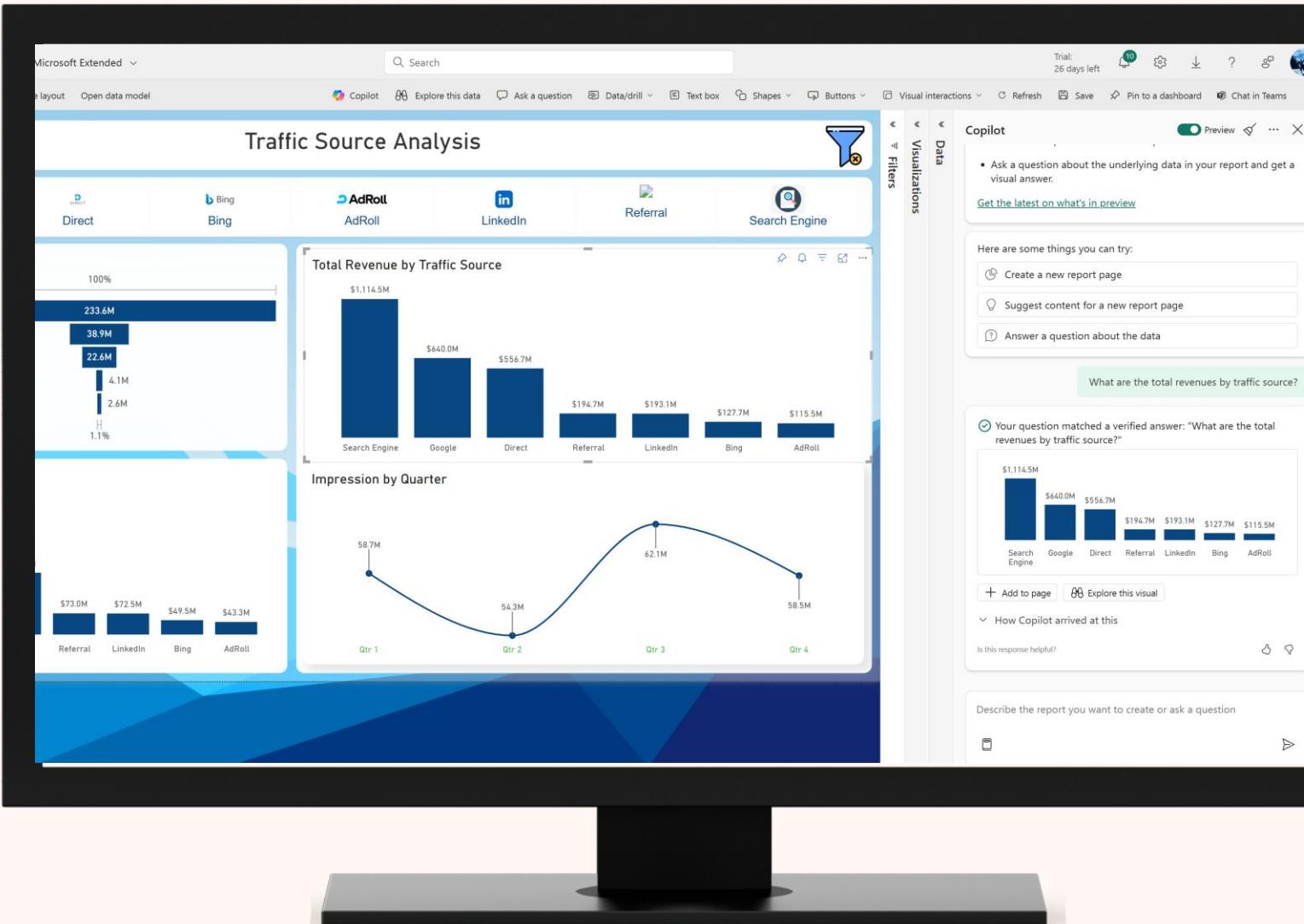
The Copilot sidebar on the right shows a preview of a response to the question "What are the total revenues by traffic source?". The response includes a bar chart with the same data as the report's bar chart, and a note indicating it is a verified answer.

Benefits

Verified Answers

Benefits

- Accuracy + consistency
- Capture business context
- Help Copilot get smarter over time
- Reuse accurate responses across models



Power BI Copilot Grounding: Schema Selection

Schema Selection

Schema selection allows users to prioritize specific data schemas for more relevant and focused insights.

The screenshot shows the 'Prep data for AI' interface. On the left, there's a sidebar with 'Get started', 'Add AI instructions', and a selected 'Simplify the data schema' option. Below that is a 'Verified Answers' section. The main area is titled 'Simplify the data schema (preview)' with a subtitle: 'Improve response accuracy by deselecting fields Copilot doesn't need to analyze. This creates a dedicated AI data schema saved with your semantic model.' It lists several dimensions with checkboxes:

- Ad Dimension
 - Ad
 - Ad_type_ID
 - a
- Model Dimension
 - Brand
 - Model_ID
- Campaign Dimension
 - Campaign
 - Campaign_ID
- Customer Type
 - Customer_Type
 - Cust_Type_ID
- Traffic Source Dimension
 - Clicks | Spendings | Revenue | Profit
 - Parameter
 - Parameter Fields
 - Σ Parameter Order
 - Impression | Conversion | Leads
- Measure

Benefits

Schema Selection

Benefits

- Column and **measure** level control
- Enhance relevance of specific measures
- Ensure Copilot model responses are friendly and pointing to the right data

The screenshot shows a dark-themed user interface titled "Prep data for AI". On the left, there's a sidebar with "Get started" and "Add AI instructions" buttons, and a "Simplify the data schema" section which is currently active, indicated by a green bar. Below that is a "Verified Answers" section. The main area is titled "Simplify the data schema (preview)" with the sub-instruction "Improve response accuracy by deselecting fields Copilot doesn't need to analyze. This creates a dedicated AI data schema saved with your sema...". A hierarchical list of fields is shown, each with a checkbox and a small icon:

- Ad Dimension
 - Ad
 - Ad_type_ID
 - a
- Model Dimension
 - Brand
 - Model_ID
- Campaign Dimension
 - Campaign
 - Campaign_ID
- Customer Type
 - Customer_Type
 - Cust_Type_ID
- Traffic Source Dimension
 - Measure
- Clicks | Spendings | Revenue | Profit
 - Parameter
 - Parameter Fields
 - Σ Parameter Order
- Impression | Conversion | Leads

Power BI Copilot Grounding: Custom Instructions

Custom instructions

Customize Copilot with instructions for how to best respond to your data.

The screenshot shows the 'Prep data for AI' section of the Power BI Copilot interface. On the left, there's a sidebar with options: 'Get started', 'Add AI instructions' (which is selected and highlighted in blue), 'Simplify the data schema', and 'Verified Answers'. The main area is titled 'Add AI instructions (preview)' with the sub-instruction 'When a user asks about revenue, use the measure: AVG Revenue Per Customer from the table called Measure.' Below this is a text input field with the placeholder 'Provide context on important data fields, business goals, and industry terms to improve Copilot insights about this semantic model.' At the bottom of the input field, it says '105/5000 characters'.

Benefits

Custom Instructions

Benefits

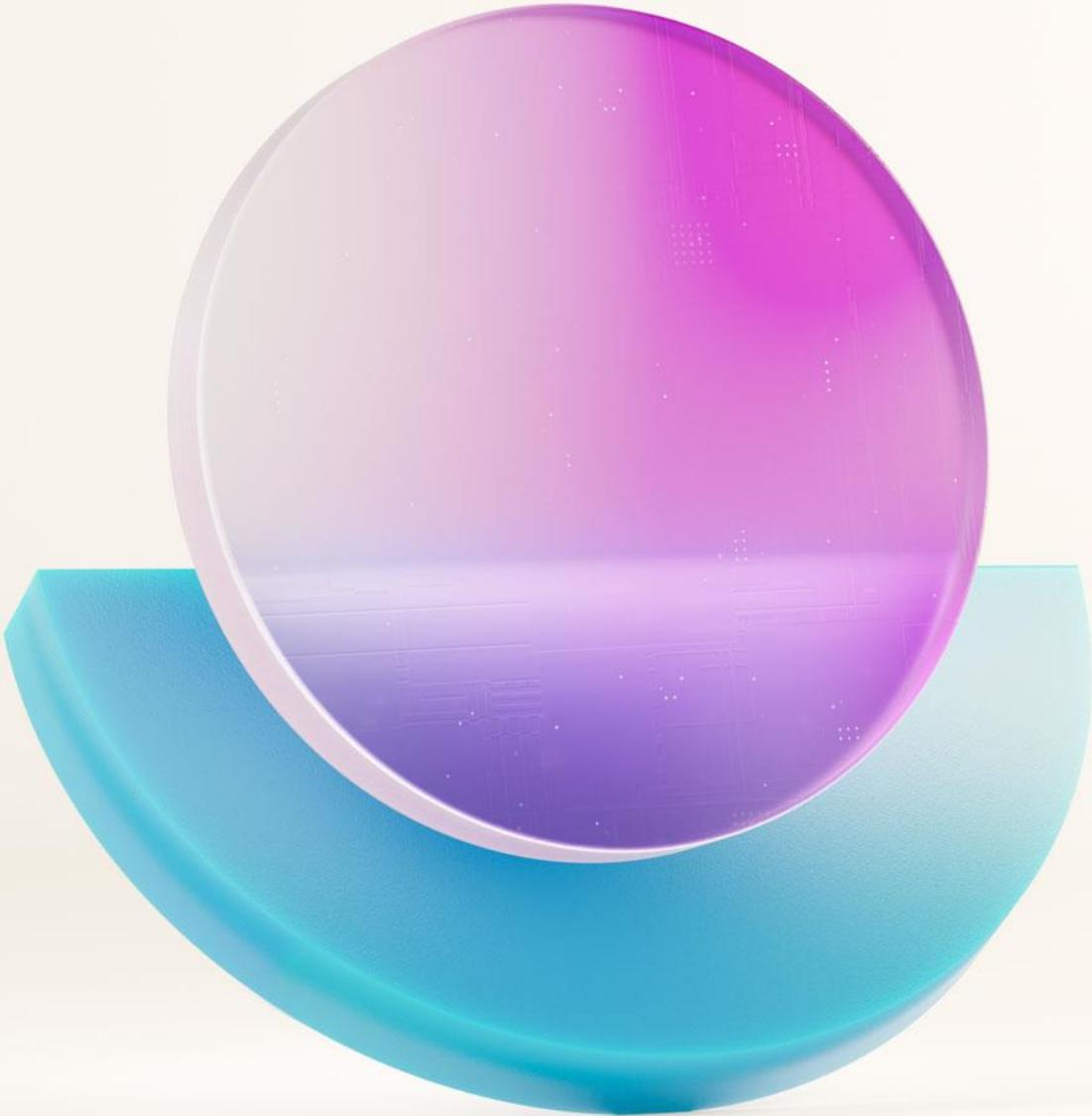
- Personalized Experience: Tailor Copilot's responses with instructions for how to best respond to your data.
- Enhanced Efficiency: Streamline workflows by providing specific instructions that align with user goals.
- Improved Accuracy: Ensure Copilot understands and executes tasks correctly by offering clear guidance.

The screenshot shows the Microsoft Copilot AI interface. On the left, there's a sidebar with options like 'Get started', 'Add AI instructions' (which is selected and highlighted in blue), 'Simplify the data schema', and 'Verified Answers'. The main area is titled 'Prep data for AI' and contains a preview of AI instructions. The preview text reads: 'When a user asks about revenue, use the measure: AVG Revenue Per Customer from the table called Measure.' Below this is a text input field with the placeholder 'Add AI instructions (preview)' and a character count indicator '105/5000 characters'.

Which skills are affected by “Prep Data for AI”

Capability	AI data schema	Verified answers	AI instructions	Descriptions
Get a summary of my report	No	No	Yes	No
Ask a question about the visuals on my report	No	Yes	Yes	No
Ask a question about my semantic model	Yes	Yes	Yes	No
Create a report page	No	No	Yes	No
Search	No	Yes	No	Yes
DAX query	No	No	Yes	Yes

⁶⁰ <https://learn.microsoft.com/en-us/power-bi/create-reports/copilot-prepare-data-ai-faq#which-copilot-capabilities-are-affected-by-preparing-my-data-for-copilot->



Wrapping up

Wrapping up

Copilot is here, we might as well embrace it

Invest time in setting up tenant settings, delegated capacity settings

Be mindful of how Control Plane and Data Plane affect usage

Copilot Capacities can really help keep mission critical workloads intact

Invest time in educating users to write prompts, and help “Prep Data for AI”

Happy Fabricating!

FGA (Frequently Given Answers) to the Admins

Chat with your Data is rolling out, wait a bit longer 😺

We're working hard to get GPUs for additional regions ..

No timeline to share on Copilot in Power BI Embedded

English is the only *official* supported language for Copilot in Fabric

Hold out a little longer for editing Linguistic Schema's for Direct Lake models

No, we can't restrict Copilot to specific workspaces, items, labels, ..

 [Power BI Blog – Chat with your data](#)

Recommended Reading/Viewing

- [Data Goblin – Copilot in Power BI Unplugged](#)
- [Havens Consulting – Demystifying Copilot in Microsoft Fabric](#)
- [Chris Webb - Power BI Copilot: Where Are The CUs Consumed](#)
- [Data Goblin – Myths, Magic, and Copilot for Power BI](#)
- [Chris Webb - Get Better Results From Power BI Copilot With Linguistic Modelling](#)
- [Chris Webb - Tuning Power BI Copilot With Row Labels And Key Columns](#)