

**Microsoft Fabric**



Chat with your Data in a Day

Lab #4

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# Document Structure

The lab includes steps for the user to follow along with associated screenshots that provide visual aid. In each screenshot, sections are highlighted with orange boxes to indicate the area(s) user should focus on.

# Scenario / Problem Statement

Congratulations on making this far. You now know how to implement generally accepted best practices in your data model and how to use the Prep your data for AI functionality. Now it’s time to explore the Standalone Copilot experience within Microsoft Fabric.

Your organization, like many others, has hundreds of reports and semantic models across dozens of workspaces. Finding the right report or data has been challenging for the end users. You want to leverage the Standalone Copilot experience to increase user adoption and gain faster time to insights across the organization.

**Current Challenges**

* **Fragment discover experience:** Users struggle to find the correct data, reports, apps, and data agents across the Fabric environment.
* **Low Adoption**: The volume of reports and required training creates friction, making it hard to drive user buy-in and adoption.
* **Delayed decision making:** Time to insights remains slow due navigation hurdles and limited self-service capabilities.

# Introduction

In previous labs you’ve learned how to prepare your semantic model for optimizing the AI Experience. In this lab you will take advantage of all that hard work and explore how Copilot in Microsoft Fabric can help accelerate time to insights within your organization.

# Standalone Copilot Experience

In this section, you will explore the Standalone Copilot experience in Fabric and discover all the cool ways that you can chat with your data. By the end of this lab will have a much better understanding of how you can leverage the standalone copilot experience to get faster time to insights, more specifically, you will learn:

* How to make the most of the standalone copilot experience
* How to understand the reports, visuals, and data responses returned.
* How to validate “how copilot arrived at this (HCAAT)”
* How to create and modify explorations, that can be shared.
* How to leverage features from Prep Data for AI, like verified answers
* How to identify friction responses
* How to leverage the general Copilot experience

**ℹ️ Important**

The Standalone Copilot experience highlighted in these labs does current keep a chat history, unlike the general Copilot experience. Therefore, be careful when clicking away from the Copilot experience!

## Setup: Workspace setup for later labs

In this lab and later labs, you will need your own workspace in order to edit and save items in Fabric. In this setup section, you will create a workspace and assign a Fabric Capacity to that workspace so you can perform specific tasks without impacting other lab attendees.

1. Open up a web browser and navigate to <https://fabric.microsoft.com/>
2. Login to Fabric using the credentials provided to you in the workshop.
3. Select **Workspaces** from the left navigation pane.

A white rectangular sign with black text

AI-generated content may be incorrect.

1. At the bottom of the workspaces pane, click **+ New workspace**.

A screenshot of a phone

AI-generated content may be incorrect.

1. Next, name your workspace: Fabrikam\_Lab\_Your3DigitCode.
2. Your 3 digit code is part of the user name you were assigned for the class. Please use this! See screenshot below.

A close-up of a sign

AI-generated content may be incorrect.

1. For example, John A. Smith would be: **Fabrikam\_Lab\_000**

A screenshot of a computer

AI-generated content may be incorrect.

1. Next, you need to assign a fabric capacity to your workspace.
2. Click **Advanced** to expand the advanced options when setting up a workspace.

A screenshot of a computer

AI-generated content may be incorrect.

1. Make sure that Premium Capacity is selected. Scroll down a little further and select, **at random**, a capacity from the drop down menu!

**ℹ️ Important**

1. The fabric environment used for this class will be updated often so you MAY NOT have the same capacities listed in the screenshot below. Just choose any available capacity!

A screenshot of a phone

AI-generated content may be incorrect.

1. Click **Apply**.

A screenshot of a computer

AI-generated content may be incorrect.

1. Next, you will need to publish the completed PBIX from your class files.
2. From your class files open up the file named **Fabrikam Company Sales Report.pbix**.



1. Once opened, make sure you are logged into your assigned user account for the CWYDIAD Workshop.
2. Click Publish, find the workspace you just created **Fabrikam\_lab\_000.**

A screenshot of a computer

AI-generated content may be incorrect.

## Task 1: Exploring the standalone copilot experience

1. Select Copilot from the left navigation pane.



1. The next step will be to select a workspace with a fabric capacity assigned. Click the button **Select a workspace**, located in the center of the screen.

A screenshot of a computer

AI-generated content may be incorrect.

1. The new window opens for **Connect to a workspace that supports Copilot.** Click the drop down and select the **Fabrikam workspace.**

A screenshot of a computer

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1. If you receive a prompt on the next screen, Click on **Get started**.
2. Welcome to the Standalone Copilot experience! On this startup screen you will receive some prompt ideas across the top **(1)** and then a section at the bottom where you can write out your request **(2)**.

A screenshot of a chat

AI-generated content may be incorrect.

## Task 2: Writing a prompt in Standalone Copilot

In this section, you will write various prompts and explore the results returned by the Copilot experience.

1. Click in the prompt and write out the following: **Find reports about Fabrikam’s sales trends for the year**. Then click **Enter**.



A screenshot of a computer

AI-generated content may be incorrect.

**ℹ️ Important**

AI returns non-deterministic results due to many factors. As discussed previously in this class, your results may vary and may not be identical to the labs. Please proceed and explore the capabilities and features being displayed to the best of your ability!

1. A lot of information is now returned. Let’s explore this section in depth.
   1. **(1)** This is the original question asked.
   2. **(2)** This is a ranked list of search results returned.
   3. **(3)** Name of the object returned, clicking here will take you to this object.
   4. **(4)** The matching criteria used. You will see things here like: Matched on title, workspace, and contents. This may also include things like “You recently opened this”.
   5. **(5)** This section provides example prompts you can click on to continue your chat experience.
2. Click on the first report returned in your search results, **Fabrikam Company Sales Report**. This will open a new tab in your web browser, taking you directly to that report.

A close-up of a screen

AI-generated content may be incorrect.

1. Take a moment to **explore** this report and familiarize yourself with it!

A screenshot of a computer

AI-generated content may be incorrect.

1. Once you’re done exploring the report. Click the (x) on the browser tab to close this tab and go back to your Copilot experience.
2. Click on the pre-generated prompt at the bottom of the page: **Give me an overview of 1. Fabrikam Company Sales**:

A screen shot of a company sales report

AI-generated content may be incorrect.

1. Telling Copilot to give you an overview of the report will provide the following information, as seen in the screenshot below. **Reminder: Your screen and results will have slight differences!!**
   1. Copilot will return report visuals from the existing report providing an overview.
   2. Copilot will provide a narrative description on each visual returned.

A screenshot of a computer

AI-generated content may be incorrect.

## Task 3: Exploring the view in report capability

Copilot can return various types of responses depending upon the questions asked and the preparedness of the underlying data. In this section, you will explore the **View in report** feature. This feature is returned whenever Copilot uses an existing visual from a report to answer your question.

1. Next, you are going to take a look at the option to **View in report**, this option will open up the current report with the specified visual spotlighted.
2. From any of the visualizations presented, click on **View in report**, this will open a new tab in your web browser. *See screenshot below*.

A map of the united states

AI-generated content may be incorrect.

1. In the new report page, you will see the copilot selected visual within the original report. You will also notice that the other visuals have been temporarily greyed out, this is because the visual you selected has been **spotlighted**. Click anywhere in the report to activate the report and explore! Once you’re done exploring, close this tab in your web browser and go back to the Standalone Copilot experience.

A screenshot of a computer

AI-generated content may be incorrect.

## Task 4: Explorations

Another feature presented by the Copilot experience is the ability to **Explore answer**. This ability to explore an answer is an awesome way to continue to refine your Copilot experience. In this section, you will learn how to use explorations, edit them, save and share them!

**ℹ️ Note**

Explorations are used primarily as tools for ad-hoc analysis of existing data and visuals on reports. Although explorations can be saved, they will often simply be closed after the ad-hoc analysis has been completed.

1. You should now be back in your Standalone Copilot experience. Click on **Explore answer** below any of the visualizations in Copilot, which one you choose does not matter for this example.

A graph with numbers and a bar

AI-generated content may be incorrect.

1. Clicking this button has now opened a new screen. Let’s explore **explorations!**
   * (1) Save the exploration as a report or as an exploration.
   * (2) Open in a new browser tab.
   * (3) Share
   * (4) View in Matrix format
   * (5) Change the visualization type
   * (6) Change the columns/measures of the visual
   * (7) Expand/Collapse view

A screenshot of a graph

AI-generated content may be incorrect.

1. Click on the drop down icon next to the Save button, this will provide a few options:
   * First, you can save this as an exploration, this is an object type in your workspace.
   * Next, you can save a copy. This option appears if the exploration has been previously saved.
   * Lastly, you can save this as a report.

A screenshot of a computer

AI-generated content may be incorrect.

1. If you completed the setup earlier in this lab, you can now save this exploration. Select Save from the drop down. You will now receive a pop up for **Save this exploration**, choose your workspace you created during the setup and hit **Save**.

A screenshot of a computer

AI-generated content may be incorrect.

1. In the screenshot below, you can see an **example** of how an explorations will appear in your workspace after being saved:

A screenshot of a group

AI-generated content may be incorrect.

1. You can also share your exploration with others, you can only share your exploration if you first save it to a workspace!
2. Back in your workspace, find the exploration and click on the share icon. You will receive a pop up that let’s you share this exploration by link, email or teams! Note. **We are not sharing explorations in this workshop, please close this box and proceed to the next step!**

A screenshot of a phone

AI-generated content may be incorrect.

1. Take some time to open the exploration and explore other features!

* Change the visual type
* Change the columns and measures being displayed

1. Once you’re done exploring, click the **X** in the top right corner to close out your exploration.

A screenshot of a computer

AI-generated content may be incorrect.

## Task 5: Verified Answers

Earlier in the class, you spent time prepping your data model for AI. Part of preparing your data for AI is creating verified answers. Verified answers ensure that certain visualizations are returned when questions are asked in Copilot. This provides a more curated and consistent experience for the end user while also ensuring accuracy, consistency and trust across the reports!

1. For this next session, you will also learn how you can further improve the prompt experience by adding items for better insights. By explicitly attaching an item, Copilot can narrow down the scope of work providing much clearer and concise results. You can currently attach three items to the prompt with a fourth coming soon:

* Reports
* Semantic Models
* Data Agents
* Apps (coming soon)

1. Click on **+ Add items for better insights**, found in the bottom left corner of the prompt.

A screen shot of a computer

AI-generated content may be incorrect.

1. Select **Reports** from the listed options. Then select **Fabrikam Company Sales Report**. Click **Confirm**.

A screenshot of a computer

AI-generated content may be incorrect.

1. This report now shows up as linked in your Copilot prompt! Next, complete the prompt by typing **What is our best selling product?**

A screenshot of a computer

AI-generated content may be incorrect.

1. You should receive the following from this prompt. If a verified answer was used in the response, a notification will appear above the answer. *See screenshot below*.
2. You will also be provided with an option to view the report and explore the data.

A screenshot of a computer

AI-generated content may be incorrect.

## Task 6: How Copilot arrived at this (HCAAT)

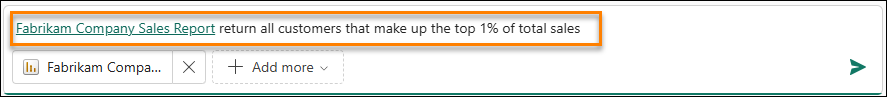
Sometimes Copilot doesn’t just deliver an answer, it explains how it got there. This provides a behind the scenes glimpse into the logic, filters, measures and more that shaped the response. More specifically, this is known as HCAAT or How Copilot arrived at this. These insights are more than just helpful, they empower you to validate results, build trust in the output and deepen your understanding of the underlying model. When this happens, it can be very insightful and offer a way to validate the results.

1. Below your verified answer, click **How Copilot arrived at this**.
2. You will see the question you asked, the data used to answer the question and any filters that were applied.

A screenshot of a computer

AI-generated content may be incorrect.

1. HCAAT can return different results based on how it arrived at the results. Let’s take a look at another example.
2. In the Copilot prompt, attach the **Fabrikam Company Sales Report** and then type out the following: **return all customers that make up the top 1% of total sales.**



1. Let’s review the results.
   * (1) First, we get a response that the answer required more analysis than usual. This is a DAX generated result from Copilot. Make sure to check the code!
   * (2) The table displaying the results. The results look great. Notice that even though we asked for Customers we are getting Resellers. This is because when we prepped our data for AI we removed the Customer table and we used a synonym for Reseller.
   * (3) How Copilot arrived at this
   * (4) The Fabrikam Sales Report
   * (5) The DAX Query that was generated by Copilot to arrive at the results

A screenshot of a computer

AI-generated content may be incorrect.

1. First, let’s explore HCAAT. Click on **How Copilot arrived at this** to expand the description.
2. This time the result we get is much different than before. You will receive a narrative description explaining how Copilot arrived at this response.

A screenshot of a computer

AI-generated content may be incorrect.

In this section you learned that Copilot will sometimes share how it arrived at a specific answer. The way that Copilot shares or displays this information can vary based on process that Copilot used to return the response!

## Task 7: A data answer from a DAX Query generated by Copilot

In the previous example, Copilot generated a DAX Query by looking at the underlying data in the Semantic model. Furthermore, Copilot warned you to check the results for accuracy! Let’s dive further into the response.

* + - 1. Looking at the results in the screenshot above, you can see that total sales are repeated for each customer. This is usually an indication that there is not a valid relationship between the tables that are part of the response we are getting.

1. Click on **View DAX Query**.

A screenshot of a computer

AI-generated content may be incorrect.

1. This will provide a popup dialog box that shows the generated DAX Query along with inline comments of how the solution arrived at this answer. Near the bottom you will see the description of how Copilot arrived at this result. Finally, at the bottom of the popup you have two options you can perform.

* Run Query – This will take the current DAX and open it up in the DAX Query View
* Copy Query – This option will copy the DAX to your clipboard

A screenshot of a computer

AI-generated content may be incorrect.

1. Click **Run query**. A new tab will open in your web browser to the DAX Query view on your Fabrikam Company Semantic Model.

A screenshot of a computer

AI-generated content may be incorrect.

1. Click **Run** to see the results here in the DAX Query View. The results here are the same results we received from Copilot. If you are familiar with DAX language, you could modify the DAX expression to refine your results further.

A screenshot of a computer

AI-generated content may be incorrect.

1. This appears to be a great response by Copilot and all our Prep has paid off. If I open back up Power BI desktop and build a quick visual, I can quickly verify the response from Copilot is correct!

A screenshot of a computer

AI-generated content may be incorrect.

1. The other thing to point out here is that you also have access to see the model view. From here you can validate the tables and relationships in the semantic model.

A screenshot of a computer

AI-generated content may be incorrect.

In this lab you learned that you could view the DAX generated by Copilot, you could launch the DAX Query view and modify the existing code and even go into the model view and verify the relationships.

**ℹ️ Important**

The chat with your data experience in an extremely useful tool that will significantly improve the time to insights for corporations around the world. However, these results can also be incorrect or misleading. It’s very important to stop and validate the results as we saw in this lab!

## Task 8: Context switching in Copilot

So far in this workshop your focus has been solely on the Fabrikam Company Sales data. However, our organization has many different reports across many workspaces and the Standalone Copilot experience will reference all the reports that it has access to.

1. In your Copilot prompt, type the following: **How many confirmed cases have there been?**

A screenshot of a computer

AI-generated content may be incorrect.

1. We purposefully provided a very generic prompt, and Copilot was able to figure out what you wanted based on the contents of the report! Remember, beneath the report provided, Copilot lets you know the criteria that it matches on.
2. Next, click **Use 1. State of Nevada COVID-19 Dashboard** to continue.

A screenshot of a computer screen

AI-generated content may be incorrect.

1. Perfect! Copilot now answers our questions by returning a visual from the underlying report.
2. Ask another question of the data, in the prompt type: **How many deaths were there in Carson City in 2019?**

A close-up of a computer screen

AI-generated content may be incorrect.

1. This time Copilot did not find an existing visual that it could return and as a result, Copilot generated an answer from the report’s underlying data. When this happens, on a model that is not marked as Prepped for AI, you receive a **friction response**.

**ℹ️ Important**

A friction response is a system -generated warning or limitation that appears when Copilot encounters an unprepared or poorly described data model. Copilot is essentially saying, I can try to help with the information available, however, the results should be validated!

To reduce friction responses from Copilot, make sure to Prep your semantic models for AI and then mark the semantic model as Prepped for AI after publishing. See the Tenant Settings guidance document provided in your lab files.

## Task 9: Copilot construction of a visual from the Semantic Model

In previous labs, you observed Copilot returning visualizations to answer specific questions. These visualizations were visuals that already existed within our reports. In this section, you will see how Copilot can also construct visualizations from the semantic model to answer requests.

1. If you’re not in Copilot already, navigate back to Copilot in Fabric.
2. In your prompt, attach your **Fabrikam Company Sales Report** and then type the following: **Show me units sold over time**.

A screenshot of a computer

AI-generated content may be incorrect.

1. The visualization returned is not a visual that previously existed within the report. This is a visualization that was created by Copilot based on the Semantic model! In fact, unlike visuals that come from a report directly, this answer generated by Copilot comes with a HCAAT explanation, *How Copilot arrived at this*.

A screenshot of a computer

AI-generated content may be incorrect.

1. Let’s explore the results, click on **How Copilot arrived at this**.

A screenshot of a computer

AI-generated content may be incorrect.

## Task 10: General Copilot experience

In this lab, you learned about how to leverage the Standalone Copilot experience in Microsoft Fabric to explore your existing reports and semantic models. However, you can also leverage the general Copilot experience. In this lab, we will leverage Copilot to construct an email on our findings!

1. In your Copilot prompt, type **Take the conversation so far and turn it into an email to share with the team**.

A screenshot of a computer

AI-generated content may be incorrect.

1. The results are pretty cool! As a reminder, your response will look vastly different than the screenshot. It’s also important to remember that the response is based on your current open chat with Copilot, if you cleared the chat or have very little conversation history then that will impact the final results.

A screenshot of a computer screen

AI-generated content may be incorrect.

1. This is good, but it would be a lot better if we had some visualizations and links in the email. In your Copilot prompt, ask copilot to **Add visuals and links to the email**.

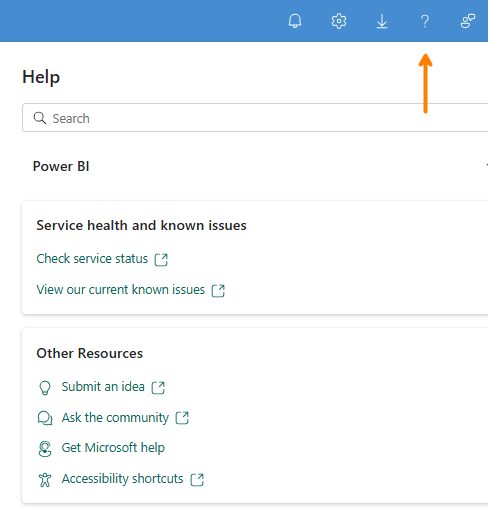
A screenshot of a computer

AI-generated content may be incorrect.

# References

Chat With Your Data in a Day (CWYDIAD) introduces you to some of the key features when using standalone Copilot in a Fabric workspace.

In the menu of the service, the Help (?) section has links to some great resources. Keep in mind the view that you see is dependent upon what experience you are currently in and therefore your options may look different than the screenshot below.



Here are a few more resources that will help you with your next steps with Microsoft Fabric.

* Access all the information in the main [Microsoft Fabric Documentation](https://learn.microsoft.com/en-us/fabric/)
* Explore Fabric through the [Guided Tour](https://aka.ms/Fabric-GuidedTour)
* Sign up for the [Microsoft Fabric free trial](https://aka.ms/try-fabric)
* Visit the [Microsoft Fabric website](https://aka.ms/microsoft-fabric)
* Learn new skills by exploring the [Fabric Learning modules](https://aka.ms/learn-fabric)
* Read the [free e-book on getting started with Fabric](https://aka.ms/fabric-get-started-ebook)
* Join the [Fabric community](https://aka.ms/fabric-community) to post your questions, share your feedback, and learn from others

Read the more in-depth Copilot-relevant technical documentation:

* [Copilot for Power BI Overview - Power BI | Microsoft Learn](https://learn.microsoft.com/en-us/power-bi/create-reports/copilot-introduction)
* [Standalone Copilot Experience in Power BI (Preview) – Power BI | Microsoft Learn](https://learn.microsoft.com/en-us/power-bi/create-reports/copilot-chat-with-data-standalone)
* [Microsoft Fabric Copilot admin settings | Microsoft Learn](https://learn.microsoft.com/en-us/fabric/admin/service-admin-portal-copilot)
* [Fabric data agent creation (preview) - Learn how to create a Fabric data agent | Microsoft Learn](https://learn.microsoft.com/en-us/fabric/data-science/concept-data-agent)
* [Best practices for configuring your data agent - Microsoft Fabric | Microsoft Learn](https://learn.microsoft.com/en-us/fabric/data-science/data-agent-configuration-best-practices)
* [Copilot for Microsoft Fabric and Power BI: FAQ - Microsoft Fabric | Microsoft Learn](https://learn.microsoft.com/en-us/fabric/fundamentals/copilot-faq-fabric)

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