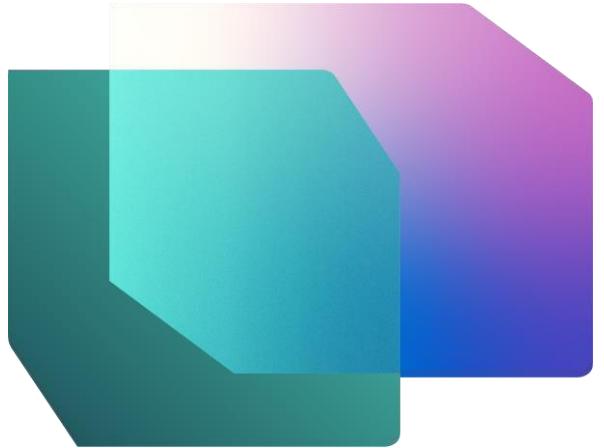


Microsoft Fabric

Chat with your Data in a Day
Lab #4

Version: September 2025



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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

Within your organization you have a lot of reports and semantic models across many workspaces. You need to retrieve sales information specifically for Fabrikam but you're not sure where those various reports are within your Fabric environment. A coworker recently introduced you to the Standalone Copilot experience and you're excited to explore these capabilities!

Current Challenges

- Quickly return necessary information to make business decisions

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 you 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 (HCAT)"
- 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

Important

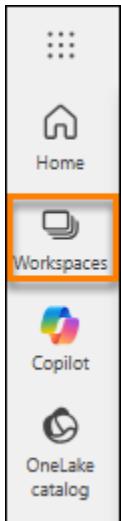
The Standalone Copilot experience highlighted in these labs does not currently keep a chat history, unlike the general Copilot experience. Therefore, be careful when clicking away from the Copilot experience!

Setup: Workspace setup for labs

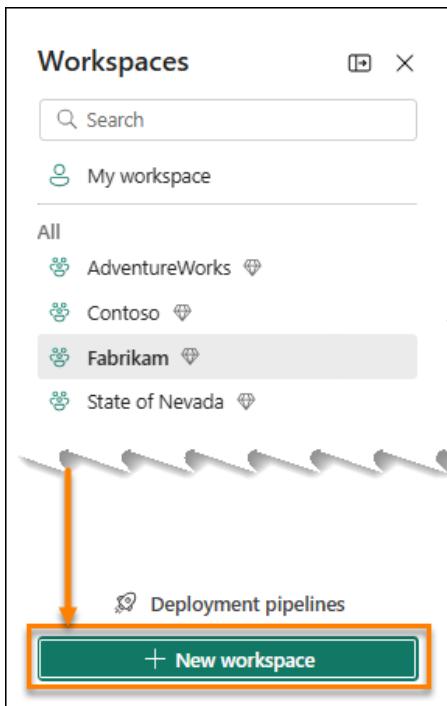
In this lab and the bonus lab, you will need your own workspace in order to edit and save items in Fabric.

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.



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



5. Next, name your workspace: Fabrikam_Lab_Your3DigitInitials.
6. For example, John A. Smith would be: **Fabrikam_Lab_JAS**

Replace initials with your 3 digit initials ×

Name *
 Fabrikam_Lab_Initials

This name is available

Description

Domain ?

Learn more about workspace settings ↗

Workspace image
 Upload
Reset

7. Next, you need to assign a fabric capacity to your workspace. There are four capacities available for this lab tenant.
8. Click the Advanced to expand the advanced options when setting up a workspace.

Domain ?

Learn more about workspace settings ↗

Workspace image
 Upload
Reset

Advanced ▼

9. Make sure that Premium Capacity is selected. Scroll down a little further and select, **at random**, one of the four capacities listed in the drop down menu!

Important

To get the best experience, it's important that you randomize which capacity you choose here! If all students choose the same capacity, this could impact the performance of the labs.

Create a workspace X

Trial
Select Trial to assign this workspace to a Fabric trial capacity. A Microsoft Fabric trial capacity allows user to explore the capabilities of Microsoft Fabric like Data Factory, Data Engineering and Real-Time Intelligence among others. [Learn more ↗](#)

Premium per-user
Select Premium per-user to collaborate using Power BI Premium features, including advanced dataflows, and datamarts. To collaborate and share content in a Premium per-user workspace, users need Premium per-user licenses. [Learn more ↗](#)

Premium capacity
Select premium capacity if the workspace will be hosted in a premium capacity. When you share, collaborate on, and distribute Power BI and Microsoft Fabric content, users in the viewer role can access this content without needing a Pro or Premium per-user license. [Learn more ↗](#)

Embedded
Select embedded if the workspace will be hosted in an Azure embedded capacity. ISVs and developers use Power BI Embedded to embed visuals and analytics in their applications. [Learn more ↗](#)

Fabric capacity
Select Fabric capacity if the workspace will be hosted in a Microsoft Fabric capacity. With Fabric capacities, users can create Microsoft Fabric items and collaborate with others using Fabric features and experiences. Explore new capabilities in Power BI, Data Factory, Data Engineering, and Real-Time Intelligence, among others. [Learn more ↗](#)

Choose one at random!

Semantic model storage format

Small semantic model storage format

Large semantic model storage format

[Learn more about semantic model storage formats ↗](#)

Capacity *

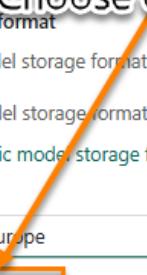
FabConEU6-P2 - West Europe

FabConEU6-P2 - West Europe

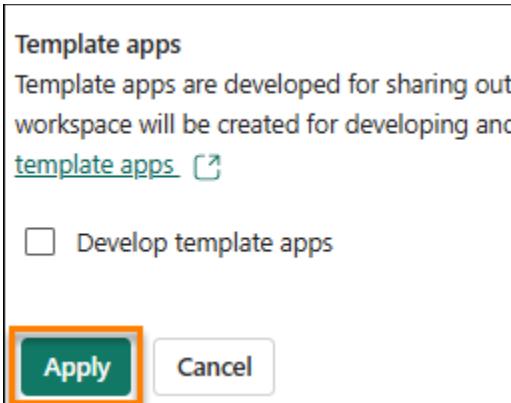
FabConEU8-P1 - West Europe

FabConEU7-P1 - West Europe

FabConEU5-P2 - West Europe



10. Click **Apply**.

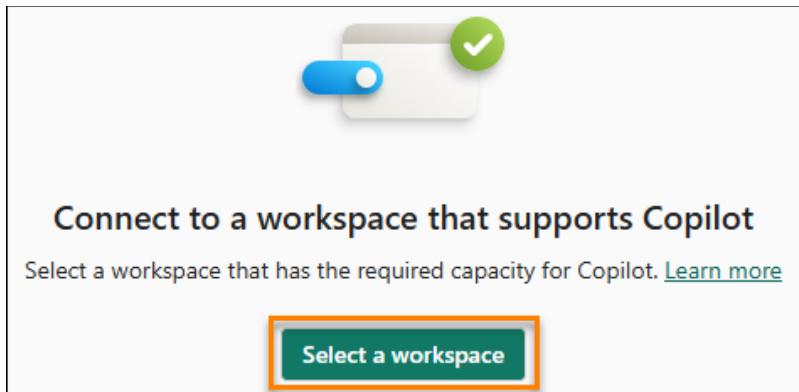


Task 1: Exploring the standalone copilot experience

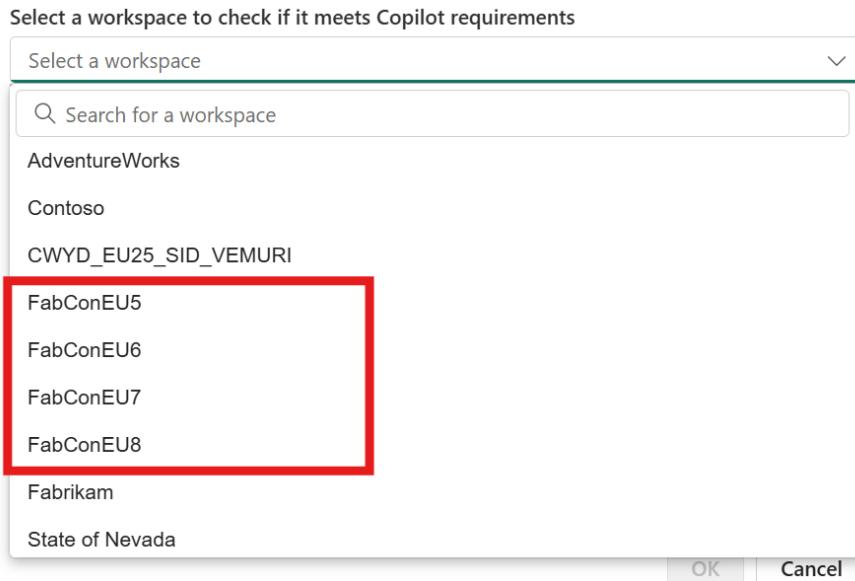
1. Select Copilot from the left navigation pane.



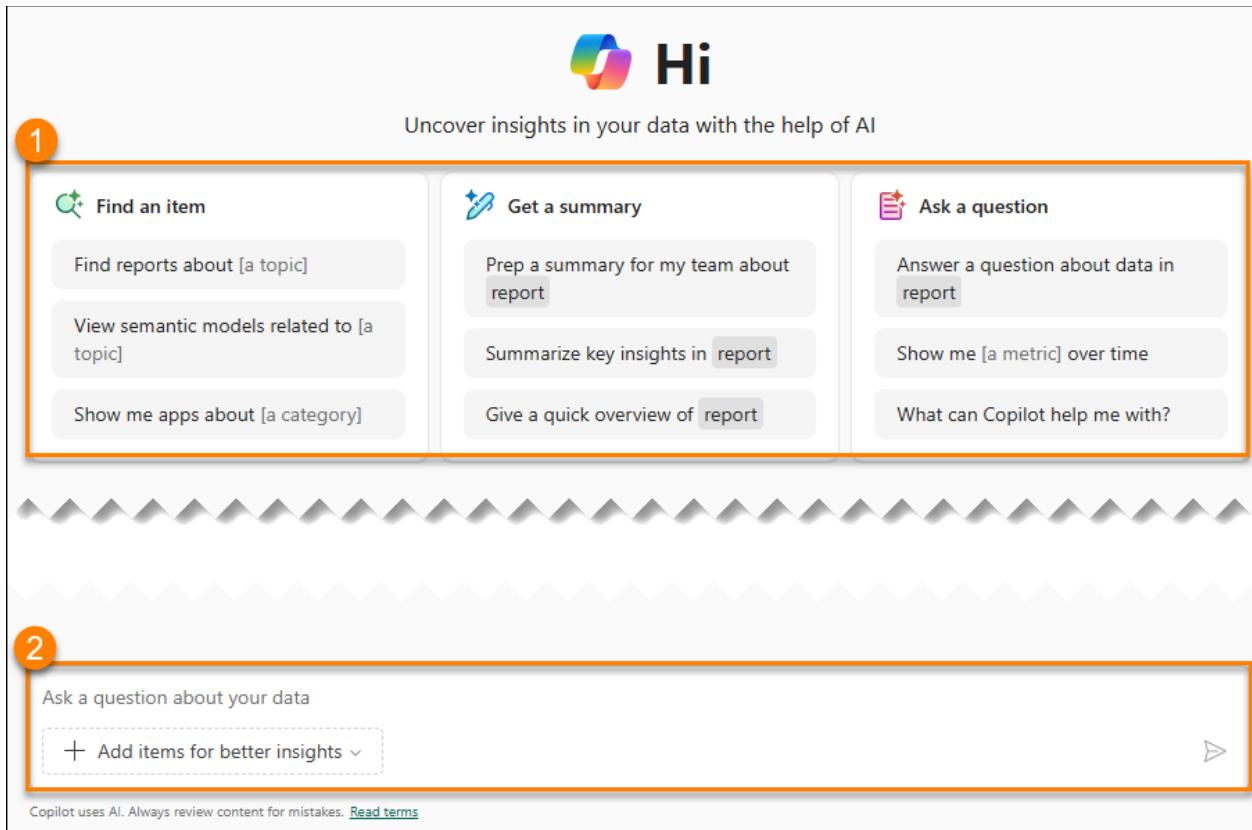
2. The next step will be to select a workspace with a fabric capacity assigned. Click the button **Select a workspace**, located in the center of the screen.



3. The new window opens for **Connect to a workspace that supports Copilot**. Click the drop down and select either the workspace you created in the setup for this lab or a random workspace among FabConEU5, FabConEU6, FabConEU7, FabConEU8



4. If you receive a prompt on the next screen, Click on **Get started**.
5. 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).



Tip: Using the Skill picker

In May, we introduced the Skill picker in Power BI Desktop. This capability allows you to isolate Copilot skills for easier troubleshooting. Throughout the lab, use the skill picker as needed to test Copilot and get the answers that you are looking for.

The skill picker is located at the bottom left of the Copilot chat pane.

To isolate Copilot skills:

- Open Copilot in Power BI Desktop
- Click on the **Select skills** button and deselect the skills you don't want Copilot to use.
- This will reset each time you reopen Copilot, or clear the chat history.

Choose the skills Copilot can use in this chat.

- ✓ Answer questions about the data
- ✓ Analyze report visuals
- Create new report pages

Describe the report you want to create or ask a question



Select skills ▾



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**.

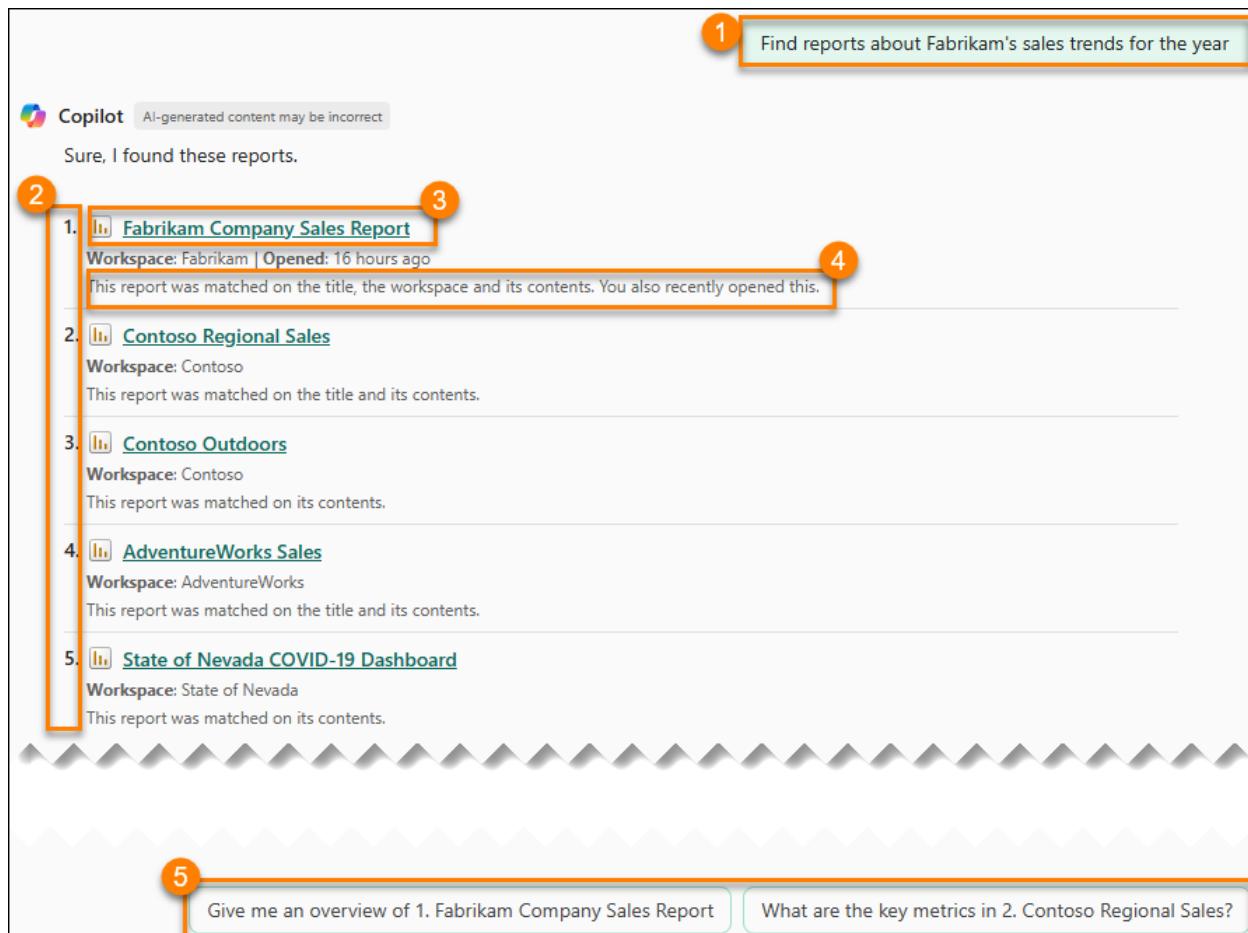
Find reports about Fabrikam's sales trends for the year

+ Add items for better insights ▾



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!



The screenshot shows a Microsoft Copilot AI interface. At the top, a message says "Copilot AI-generated content may be incorrect". Below it, the AI responds: "Sure, I found these reports." A numbered list of five reports is shown, each with a small icon, the report name, workspace, and a note about matching criteria. The first report, "Fabrikam Company Sales Report", is highlighted with an orange box and has a detailed note below it. At the bottom, there are two example prompts: "Give me an overview of 1. Fabrikam Company Sales Report" and "What are the key metrics in 2. Contoso Regional Sales?".

1 Find reports about Fabrikam's sales trends for the year

2

3

4

5

1. [Fabrikam Company Sales Report](#)
Workspace: Fabrikam | Opened: 16 hours ago
This report was matched on the title, the workspace and its contents. You also recently opened this.

2. [Contoso Regional Sales](#)
Workspace: Contoso
This report was matched on the title and its contents.

3. [Contoso Outdoors](#)
Workspace: Contoso
This report was matched on its contents.

4. [AdventureWorks Sales](#)
Workspace: AdventureWorks
This report was matched on the title and its contents.

5. [State of Nevada COVID-19 Dashboard](#)
Workspace: State of Nevada
This report was matched on its contents.

Give me an overview of 1. Fabrikam Company Sales Report

What are the key metrics in 2. Contoso Regional Sales?

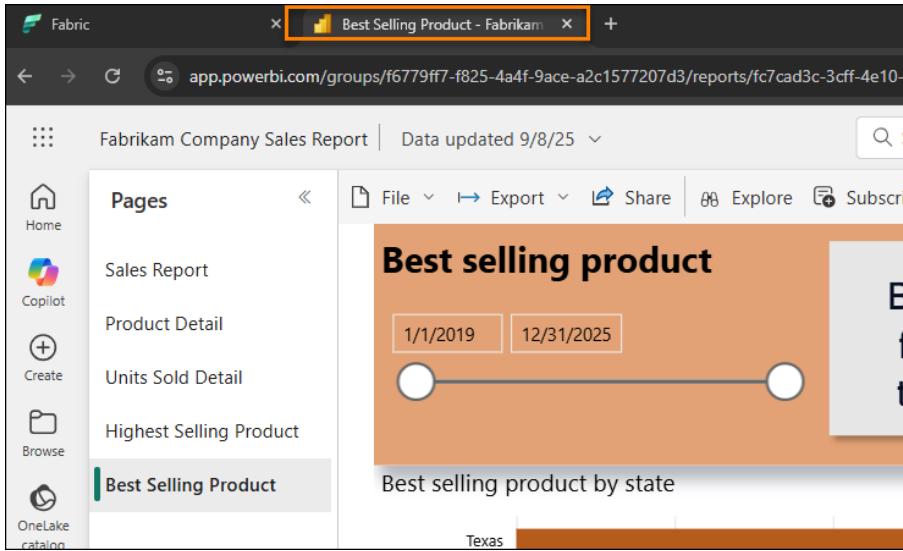
2. A lot of information is now returned. Let's explore this section in depth.
 - a. (1) This is the original question asked.
 - b. (2) This is a ranked list of search results returned.
 - c. (3) Name of the object returned, clicking here will take you to this object.
 - d. (4) The matching criteria used. You will see things here like: Matched on title, workspace, and contents. This may also include things like "You recently opened this".
 - e. (5) This section provides example prompts you can click on to continue your chat experience.
3. 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.

1.  [Fabrikam Company Sales Report](#)

Workspace: Fabrikam | Opened: 16 hours ago

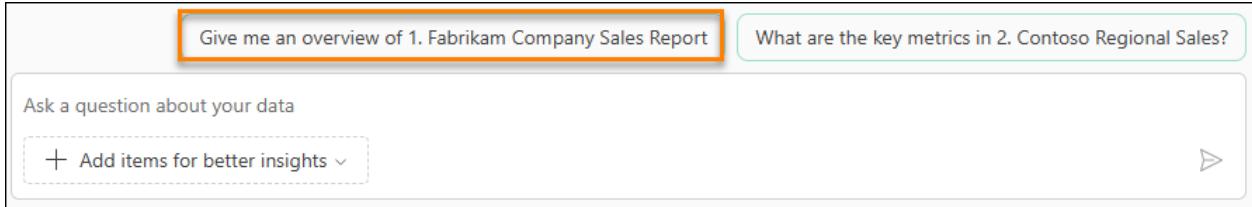
This report was matched on the title, the workspace and its contents. You also recently opened this.

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



The screenshot shows a Power BI report titled "Best Selling Product - Fabrikam". The report has a sidebar with options like Home, Copilot, Create, Browse, and OneLake catalog. The main area displays a chart titled "Best selling product" with a date range from 1/1/2019 to 12/31/2025. Below the chart, a bar chart shows "Best selling product by state" with Texas highlighted. The report was last updated on 9/8/25.

- 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.
- Click on the pre-generated prompt at the bottom of the page: **Give me an overview of 1. Fabrikam Company Sales:**



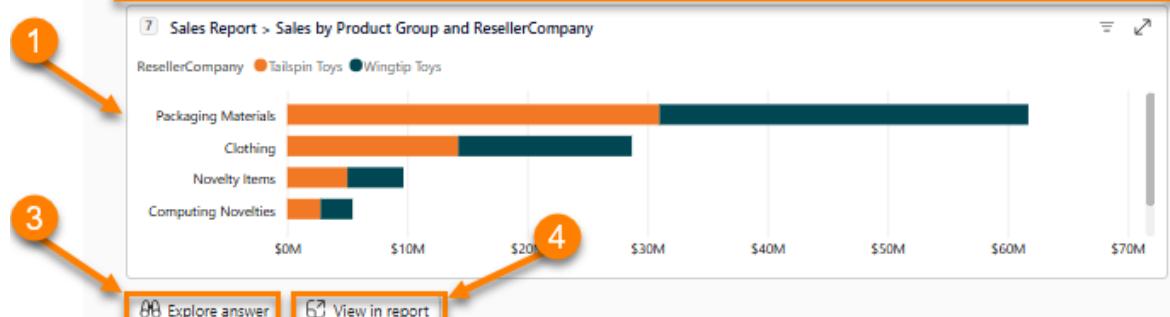
The screenshot shows the Microsoft Copilot interface. A prompt box contains the text "Give me an overview of 1. Fabrikam Company Sales Report". Below the prompt is a text input field with placeholder text "Ask a question about your data" and a button "+ Add items for better insights". To the right of the input field is a green button with the text "What are the key metrics in 2. Contoso Regional Sales?".

- 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!!**
 - Copilot will return report visuals from the existing report providing an overview.
 - Copilot will provide a narrative description on each visual returned.

2 Copilot AI-generated content may be incorrect

Fabrikam's total sales to resellers reached \$105.7 million, with a gross margin of \$52.6 million and a margin percentage of 50%. The company processed 43,303 sales orders, selling over 5.5 million units, and the average order value was \$2,441 ① ② ③ ④ ⑤ ⑥.

Sales were strongest in the Packaging Materials and Clothing product groups, each generating over \$14 million in sales per major reseller, with Packaging Materials exceeding \$30 million per reseller ⑦. The top sales territories by dollar value included Texas (\$7.26 million), Pennsylvania (\$6.67 million), and New York (\$5.62 million) ⑧.

1 

3 

4 

Task 3: Exploring 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.*

Sales Report > Sales by StateProvinceName and SalesTerritory

Explore answer

View in report

- 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.

File Export Share Explore Subscribe Set alert Edit ...

Fabrikam Company

Sales Report

2 Click anywhere in the report to remove the spotlight.

1

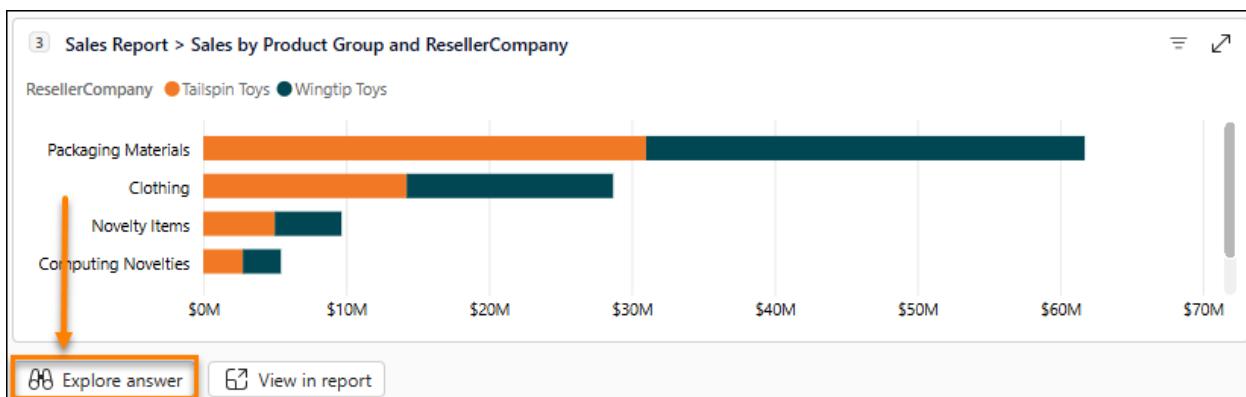
Task 4: Explorations

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!

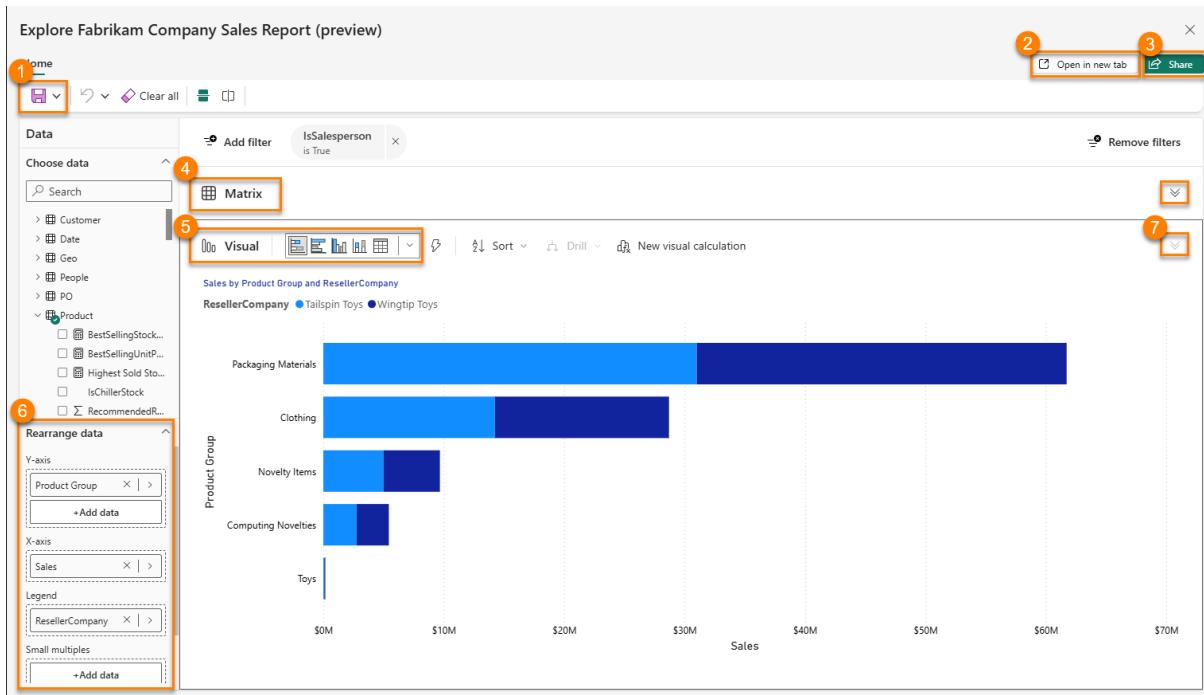
Note

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.

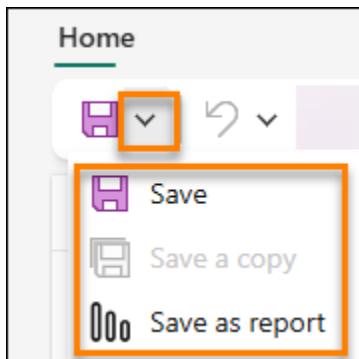
1. You should now be back in your Standalone Copilot experience. Click on **Explore answer** below any of the visualizations in Copilot, which one you choose does not matter for this example.



2. 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



3. 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.



4. 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**.

Save this exploration X

Enter a name for your exploration *

Save it to a workspace

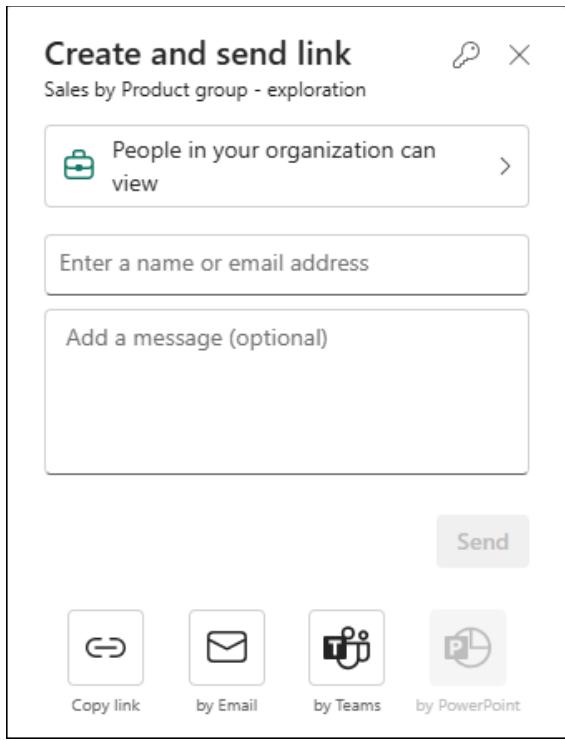
Fabrikam_Lab_Initials ▼

Save Cancel

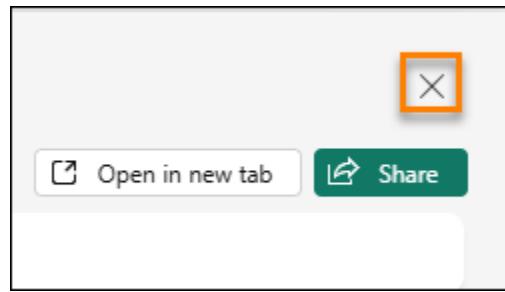
5. In the screenshot below, you can see an **example** of how an explorations will appear in your workspace after being saved:

Name	Type
 Fabrikam Company Sales Report	Report
 Fabrikam Company Sales Report	Semantic model
 Fabrikam Company Sales Report.pbix	Dashboard
 Sales by Product group - exploration	Exploration

6. You can also share your exploration with others, you can only share your exploration if you first save it to a workspace!
7. 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!**



8. Take some time to open the exploration and explore other features!
 - Change the visual type
 - Change the columns and measures being displayed
9. Once you're done exploring, click the X in the top right corner to close out your exploration.

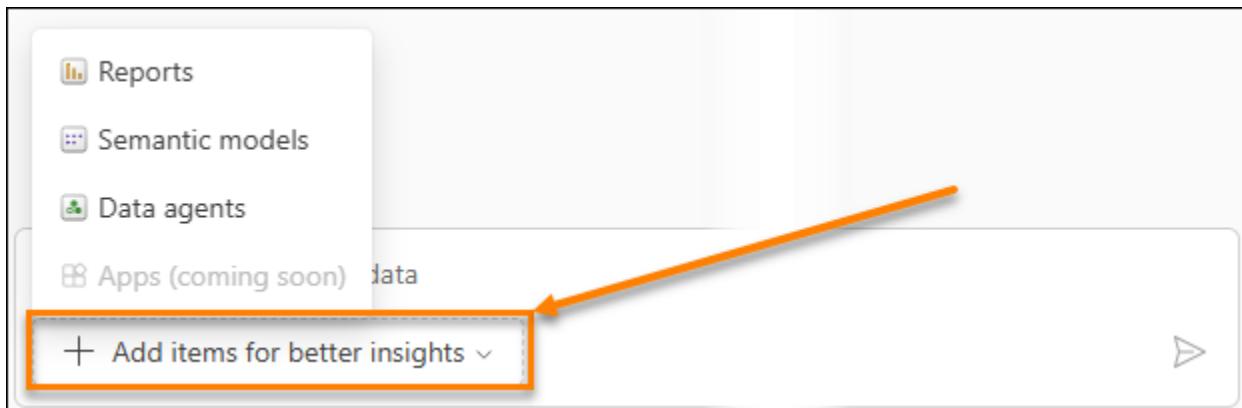


Task 5: Verified Answers

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



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

	Name	Owner
<input checked="" type="checkbox"/>	Fabrikam Company Sales Report	—
<input type="checkbox"/>	AdventureWorks Sales	—
<input type="checkbox"/>	Contoso Outdoors	—
<input type="checkbox"/>	Contoso Regional Sales	—
<input type="checkbox"/>	State of Nevada COVID-19 Dashb...	—

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

Fabrikam Company Sales Report What is our best selling product?

[Fabrikam Compa... X + Add more >]

5. 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.*
6. You will also be provided with an option to view the report and explore the data.

The screenshot shows the Microsoft Copilot interface. At the top left is the Copilot logo with the text "Copilot AI-generated content may be incorrect". Below it is a message: "Your question matched a verified answer: 'What is our best selling product?'". An orange arrow points upwards to this message. The main content area displays the answer: "Black and orange fragile despatch tape 48mmx75m". Below the answer, there is a section titled "How Copilot arrived at this" with a dropdown arrow icon. At the bottom of the interface are several buttons: a "Fabrikam Company Sales Report" button with a chart icon, an "Explore the data" button with a bar chart icon, and two smaller buttons for thumbs up and thumbs down.

Task 6: How Copilot arrived at this (HCAT)

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 HCAT 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.

^ How Copilot arrived at this

You asked: "What is our best selling product?"

Data used

[Highest Sold StockName](#)

Filters applied

None

3. HCAT can return different results based on how it arrived at the results. Let's take a look at another example.
4. 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.**

[Fabrikam Company Sales Report](#) return all customers that make up the top 1% of total sales

Fabrikam Compa... X + Add more >

5. Let's review the results.
 - (1) First, we get a response that the answer was generated from the semantic model, which may not be fully prepped for AI.
 - (2) The table displaying the results. The number is duplicated which may indicate the results are not correct!
 - (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

Copilot AI-generated content may be incorrect

This answer was generated from the report's underlying data (the semantic model), which may not be fully prepped for AI use. Review carefully, as accuracy may vary. [Learn more](#)

1 i This answer required more analysis than usual. Check it carefully, AI can make mistakes. [Learn more](#)

Based on the available data, all customers listed in the table are identified as making up the **top 1% of total sales** according to the sample provided.

Note: Due to the large amount of data, this summary is based on just a subset.

Customer CustomerID	Customer FullName	CustomerSales
4c75377306535731e975839d9fe263fa	Melanie O'Reilly	105724059.25
9b4b795687e39931867dfe3a11a62e36	Ramona Jerde	105724059.25
ca0708a20d004f38ee3a92e0fd34a140	Joan Goyette	105724059.25
c25fcf60747bac90d310247f6a52e5b0	Freda Waters	105724059.25
916211a5e48481a6dcd97be8703f07ff	Patsy Zemlak	105724059.25
700c62e8a47dfb8d328eebd49ced7ce1	Minnie Powlowski	105724059.25
67595214c5c2f605a715cc787ead1b3e	Veronica Boyle	105724059.25

2 How Copilot arrived at this

3 How Copilot arrived at this

4 1 Fabrikam Company Sales Report

5 View DAX query Like Dislike

10. First, let's explore HCAT. Click on **How Copilot arrived at this** to expand the description.

11. This time the result we get is much different than before. You will receive a narrative description explaining how Copilot arrived at this response.

How Copilot arrived at this

This query displays only the customers whose total sales are in the top 1% compared to all other customers. It first calculates the total sales for each customer, then determines the sales amount that marks the 99th percentile—meaning only the highest 1% of customer sales meet or exceed this value. The results include only those customers whose total sales are at or above this threshold, effectively showing you the very top-performing customers by sales. The list is sorted from highest to lowest sales.

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: 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?**

The screenshot shows the Microsoft Copilot interface. At the top right, a text input box contains the question "How many confirmed cases have there been?". Below it, a Copilot card displays a search result: "1. State of Nevada COVID-19 Dashboard". An orange arrow points from the question in the input box to this result. Another orange arrow points from the "State of Nevada COVID-19 Dashboard" link to a green button labeled "Use 1. State of Nevada COVID-19 Dashboard".

2. 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.
3. Next, click **Use 1. State of Nevada COVID-19 Dashboard** to continue.

The screenshot shows the "State of Nevada COVID-19 Dashboard". A green button at the top right says "Use 1. State of Nevada COVID-19 Dashboard", with an orange arrow pointing to it. The dashboard displays a chart titled "COVID-19 Nevada > POPULATION, CUMULATIVE CASES and CUMULATIVE CASES PER 100K by COUNTY". The chart includes the following data:

COUNTY	POPULATION	CUMULATIVE CASES	CUMULATIVE CASES PER 100K
Carson City	56,546	3,383	5,983
Churchill	25,876	1,044	4,035
Clark	2,318,174	135,296	5,836
Douglas	49,695	1,429	2,876
Elko	54,985	3,298	5,998
Total	3,149,234	178,527	5,669

At the bottom left, there are buttons for "Explore answer" and "View in report".

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

A screenshot of the Copilot AI interface. At the top right, there is a green button with an orange arrow pointing right and the text "How many deaths were there in Carson City in 2019". Below this, the Copilot logo is followed by the text "Copilot" and "AI-generated content may be incorrect". A message box contains the text: "This answer was generated from the report's underlying data (the semantic model), which may not be fully prepped for AI use. Review carefully, as accuracy may vary. [Learn more](#)". Below the message box are three buttons: "View answer", a thumbs up icon, and a thumbs down icon.

6. 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**.

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 8: 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 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.
2. Click on **View DAX Query**.

A screenshot of a modal dialog box titled "How Copilot arrived at this". It shows a list of 1 item, "Fabrikam Company Sales Report", and a button labeled "View DAX query". An orange box highlights the "View DAX query" button, and an orange arrow points to it from the left.

3. 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 on 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

Top 1% Sales Customers (Sample Subset)

This answer required more analysis than usual. Check it carefully, AI can make mistakes. [Learn more](#)

```

1 DEFINE
2 // Summarize total sales per customer using the Sales measure from the Sales table
3 VAR _CustomerSales =
4 SUMMARIZECOLUMNS(
5     'Customer'[CustomerID],
6     'Customer'[FullName],
7     "CustomerSales", [Sales]
8 )
9 // Compute the 99th percentile threshold for customer sales (top 1% of total sales)
10 VAR _SalesThreshold = PERCENTILEX.INC(_CustomerSales, [CustomerSales], 0.99)
11
12 EVALUATE
13 // Return only the customers whose total sales are greater than or equal to the 99th percentile threshold
14 FTI TFR()

```

This query displays only the customers whose total sales are in the top 1% compared to all other customers. It first calculates the total sales for each customer, then determines the sales amount that marks the 99th percentile—meaning only the highest 1% of customer sales meet or exceed this value. The results include only those customers whose total sales are at or above this threshold, effectively showing you the very top-performing customers by sales. The list is sorted from highest to lowest sales.

 Run query  Copy query

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

The screenshot shows the Power BI DAX Query View interface. The left sidebar lists various workspace options, with 'Fabrikam Company' highlighted and its icon circled in orange. The main area displays a DAX query:

```
1  DEFINE
2      // Summarize total sales per customer using the Sales measure from the Sales table
3  VAR _CustomerSales =
4      SUMMARIZECOLUMNS(
5          'Customer'[CustomerID],
6          'Customer'[FullName],
7          "CustomerSales", [Sales]
8      )
9      // Compute the 99th percentile threshold for customer sales (top 1% of total sales)
10     VAR _SalesThreshold = PERCENTILEX.INC(_CustomerSales, [CustomerSales], 0.99)
11
12    EVALUATE
13        // Return only the customers whose total sales are greater than or equal to the 99th
14        FILTER(
15            _CustomerSales,
16            [CustomerSales] >= _SalesThreshold
17        )
18        ORDER BY
19            [CustomerSales] DESC
```

The 'Run' button in the toolbar is also circled in orange. The bottom navigation bar shows 'Query 1' and 'DAX query view' selected.

5. 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.

The screenshot shows the Power BI Data Editor interface. At the top, there are two buttons: 'Run' and 'Update model with changes (0)'. Below them is a code editor window containing the following DAX code:

```

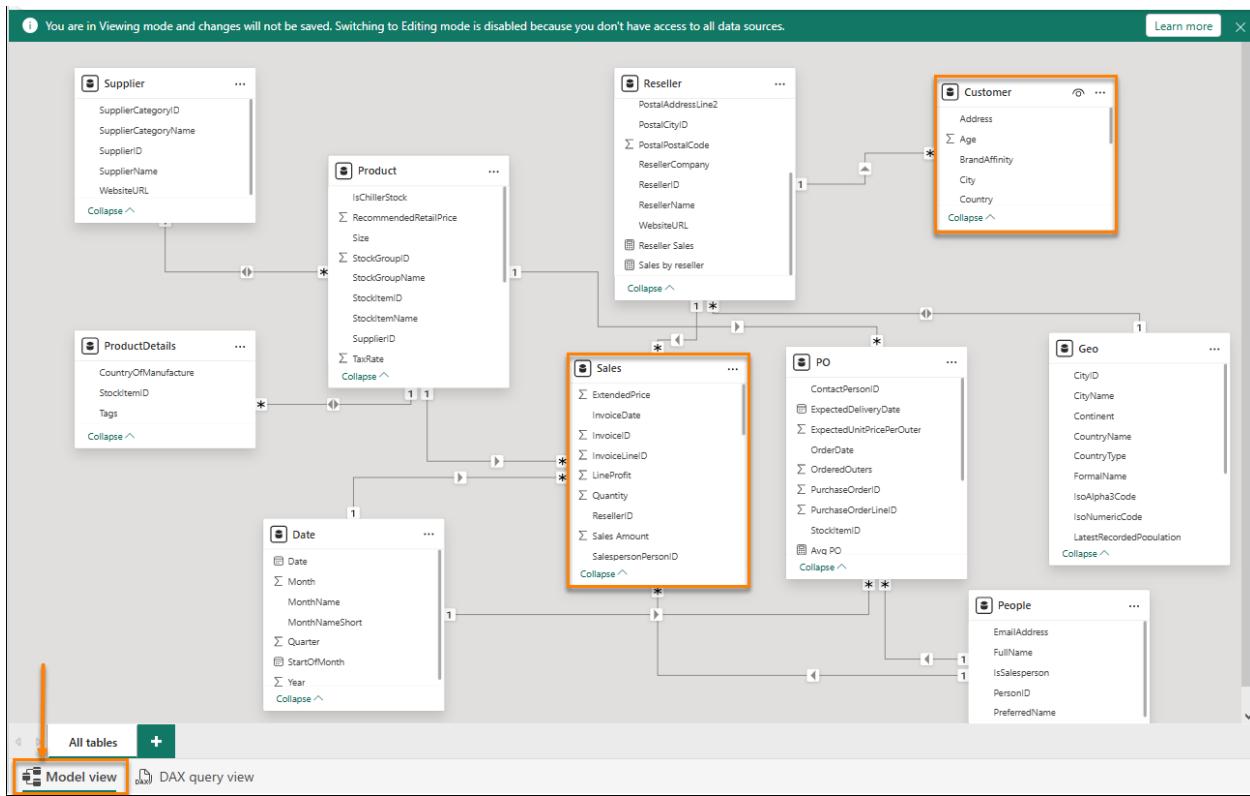
1  DEFINE
2      // Summarize total sales per customer using the Sales measure from the Sales table
3  VAR _CustomerSales =
4      SUMMARIZECOLUMN(
5          'Customer'[CustomerID],
6          'Customer'[FullName],
7          "CustomerSales", [Sales]
8      )
9      // Compute the 99th percentile threshold for customer sales (top 1% of total sales)
10     VAR _SalesThreshold = PERCENTILEX.INC(_CustomerSales, [CustomerSales], 0.99)
11

```

Below the code editor is a results section with tabs for 'Results' and 'Result 1 of 1'. The 'Result 1 of 1' tab is selected, showing a table with three columns: 'Customer[CustomerID]', 'Customer[FullName]', and '[CustomerSales]'. The '[CustomerSales]' column is highlighted with an orange border. The table data is as follows:

	Customer[CustomerID]	Customer[FullName]	[CustomerSales]
1	4c75377306535731e97...	Melanie O'Reilly	105724059.25
2	9b4b795687e39931867...	Ramona Jerde	105724059.25
3	ca0708a20d004f38ee3a...	Joan Goyette	105724059.25
4	c25fcf60747bac90d310...	Freda Waters	105724059.25
5	916211a5e48481a6dc...	Patsy Zemlak	105724059.25
6	700c62e8a47dfb8d328e...	Minnie Powlowski	105724059.25
7	67595214c5c2f605a715...	Veronica Boyle	105724059.25
8	f9b4f1edacbe310a4849...	Della Kiehn	105724059.25
9	5527b16ce30b5182e18f...	Carolyn Beahan	105724059.25
10	0e2c6e92a4a32f521c0f3...	Janet Willms	105724059.25

6. It appears, because the data is duplicated, that there is an invalid relationship between Customer and Sales. At the bottom of your screen, click on **Model View**.
7. From the Model View, you can investigate the relationship between the Customer table and the Sales table. As expected, the relationship from Customer does not filter the Reseller table and therefore any filters applied to customer will not impact the sales table. This is why the final result is incorrectly showing the same sales amount for each customer.



In this lab you learned that you can 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.

Important

The chat with your data experience is 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 9: Copilot construction of a visual from the Semantic Model

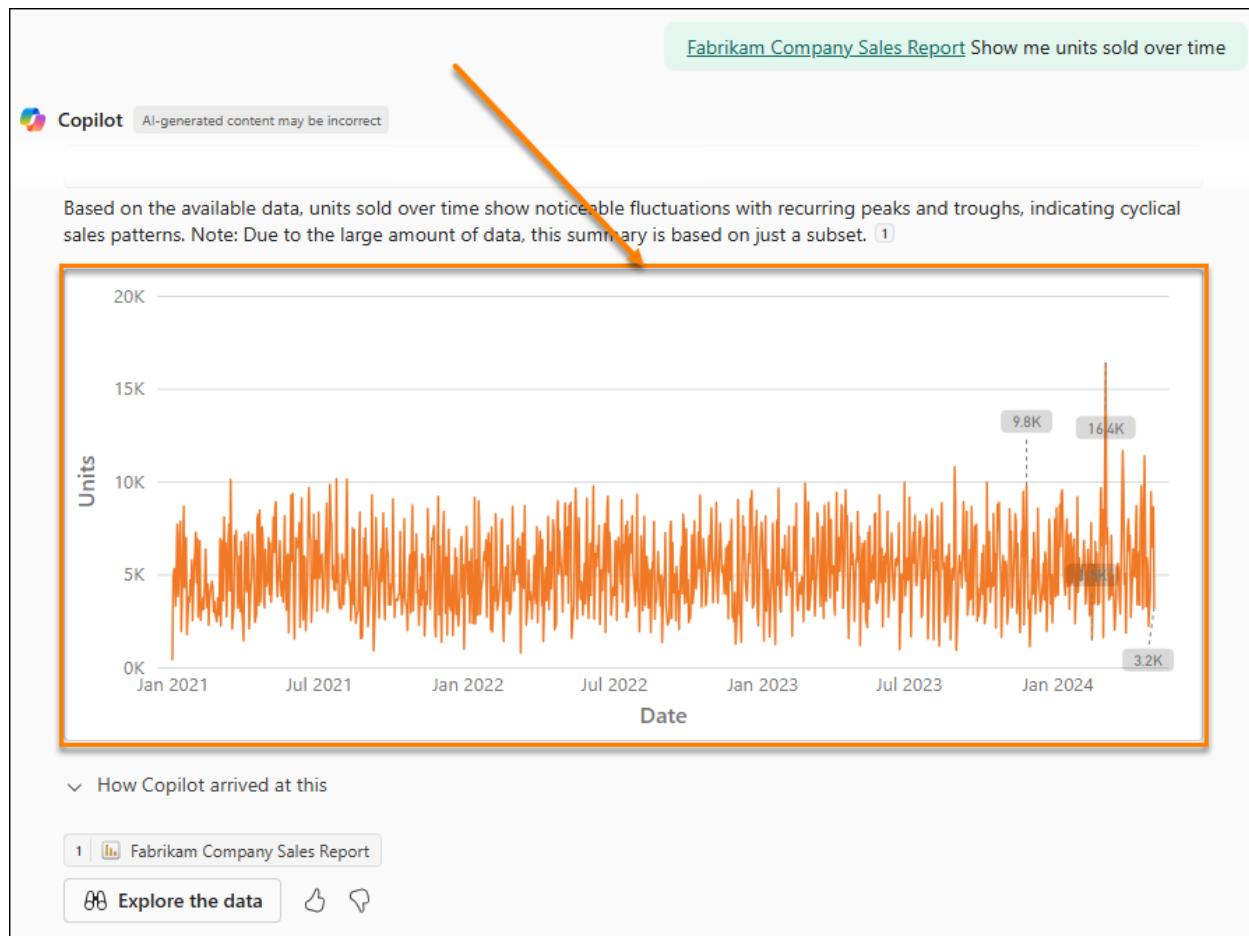
In previous labs you observed Copilot returning visualizations to answer specific questions. These visualizations were visuals that already existed within our reports. In this section, you will see how Copilot can also construct visualizations from the semantic model to answer requests.

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.**

Fabrikam Company Sales Report Show me units sold over time

Fabrikam Compa...

3. 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 HCAT explanation, *How Copilot arrived at this*.



4. Let's explore the results, click on **How Copilot arrived at this**.

^ How Copilot arrived at this

You asked: "Show me units sold over time."

Data used

- 📅 [Date](#)
- [Unit] [Units](#)

Filters applied

None

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.**

Take the conversation so far and turn it into an email to share with the team

+ Add items for better insights ▾

▶

2. 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.



Copilot AI-generated content may be incorrect

Based on information from our recent discussion, here's a summary you can share with the team:

Subject: Key Insights from Fabrikam Company Sales Report

Team,

Here are the main findings from our review of the Fabrikam Company Sales Report:

- Best Selling Product: Identified using the report's verified answer feature.
- Sales for Products Priced Above \$20: Detailed sales figures were provided for each product with a unit price above \$20, highlighting significant contributors to overall sales.
- Top 10 Customers by Sales: The leading customers by sales value were listed, with Tailspin Toys and Wingtip Toys appearing most frequently.
- Customers in Top 10% and Top 1% of Total Sales: The report was queried for customers who make up the top 10% and top 1% of total sales, using advanced data queries.
- Units Sold Over Time: Sales data shows cyclical patterns, with recurring peaks and troughs in units sold.

Let me know if you need further details or specific visualizations from the report.

Best regards,
[Your Name]



3. 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**.

Add visuals and links to the email

Copilot AI-generated content may be incorrect

Here's an updated email draft including visuals and links from our conversation:---Subject: Key Insights from Fabrikam Company Sales Report Team, Here are the main findings and supporting visuals from our review of the Fabrikam Company Sales Report:- Best Selling Product: Identified using the report's verified answer feature.- Sales for Products Priced Above \$20: Detailed sales figures for each product with a unit price above \$20.

Product Detail > Product Details

Product	Units Sold	Unit Price	Sales	In Stock	Future Orders
10 mm Anti static bubble wrap (Blue) 10m	20,210	\$26.00	\$525,460	111,163	39,849
10 mm Anti static bubble wrap (Blue) 20m	17,720	\$42.00	\$744,240	133,870	32,712
10 mm Anti static bubble wrap (Blue) 50m	19,450	\$99.00	\$1,925,550	109,756	59,347
Total	1,773,960		\$31,007,432	7,331,136	3,364,395

[Explore answer](#) [View in report](#)

- Top 10 Customers by Sales: The leading customers by sales value were listed, with Tailspin Toys and Wingtip Toys appearing most frequently.

Sales Report > Sales Orders, Sales, Units, GM, GM% and Avg Order by ResellerName and ResellerCompany

[Explore answer](#) [View in report](#)

- Customers in Top 10% and Top 1% of Total Sales: The report was queried for customers who make up the top 10% and top 1% of total sales, using advanced data queries.- Units Sold Over Time: Sales data shows cyclical patterns, with recurring peaks and troughs in units sold.(A line chart visualizing units sold over time was generated in the report.)For more details, you can access the full [Fabrikam Company Sales Report](#), let me know if you need further details or specific visualizations from the report.Best regards,[Your Name]---You can copy this summary into your email client. The links to visuals will work for anyone with access to the report.

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](#)
- Explore Fabric through the [Guided Tour](#)
- Sign up for the [Microsoft Fabric free trial](#)
- Visit the [Microsoft Fabric website](#)
- Learn new skills by exploring the [Fabric Learning modules](#)
- Read the [free e-book on getting started with Fabric](#)
- Join the [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](#)
- [Standalone Copilot Experience in Power BI \(Preview\) – Power BI | Microsoft Learn](#)
- [Microsoft Fabric Copilot admin settings | Microsoft Learn](#)
- [Fabric data agent creation \(preview\) - Learn how to create a Fabric data agent | Microsoft Learn](#)
- [Best practices for configuring your data agent - Microsoft Fabric | Microsoft Learn](#)
- [Copilot for Microsoft Fabric and Power BI: FAQ - Microsoft Fabric | Microsoft Learn](#)

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