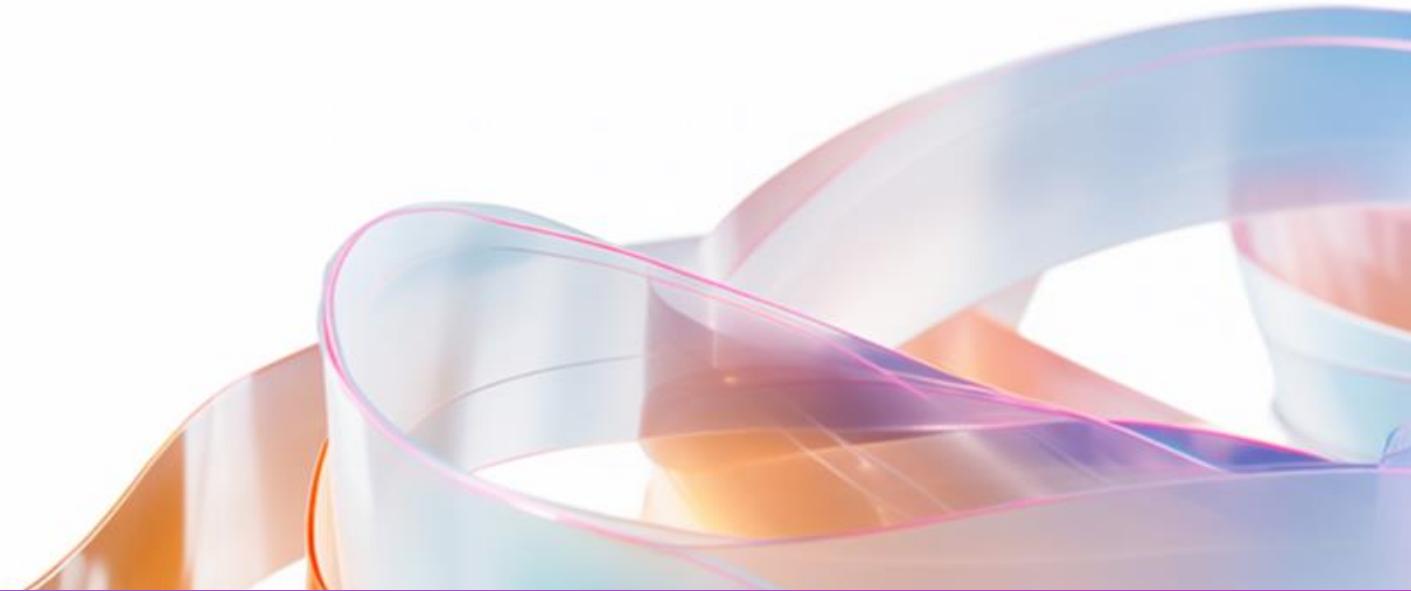
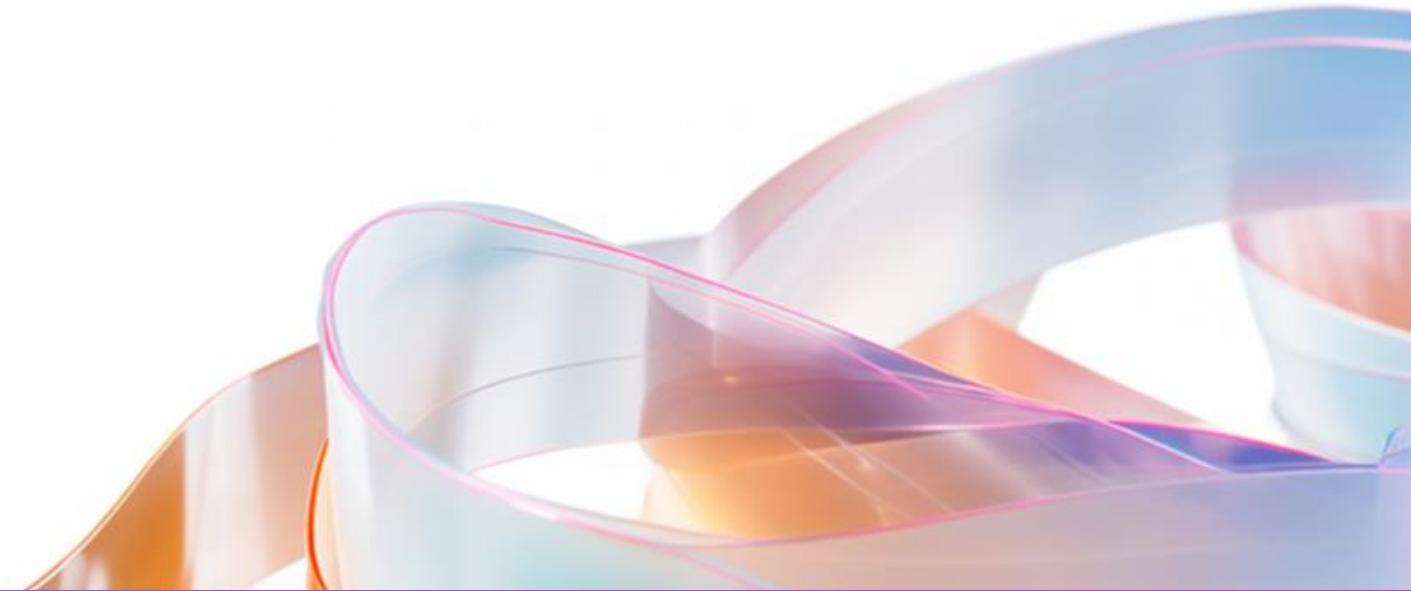


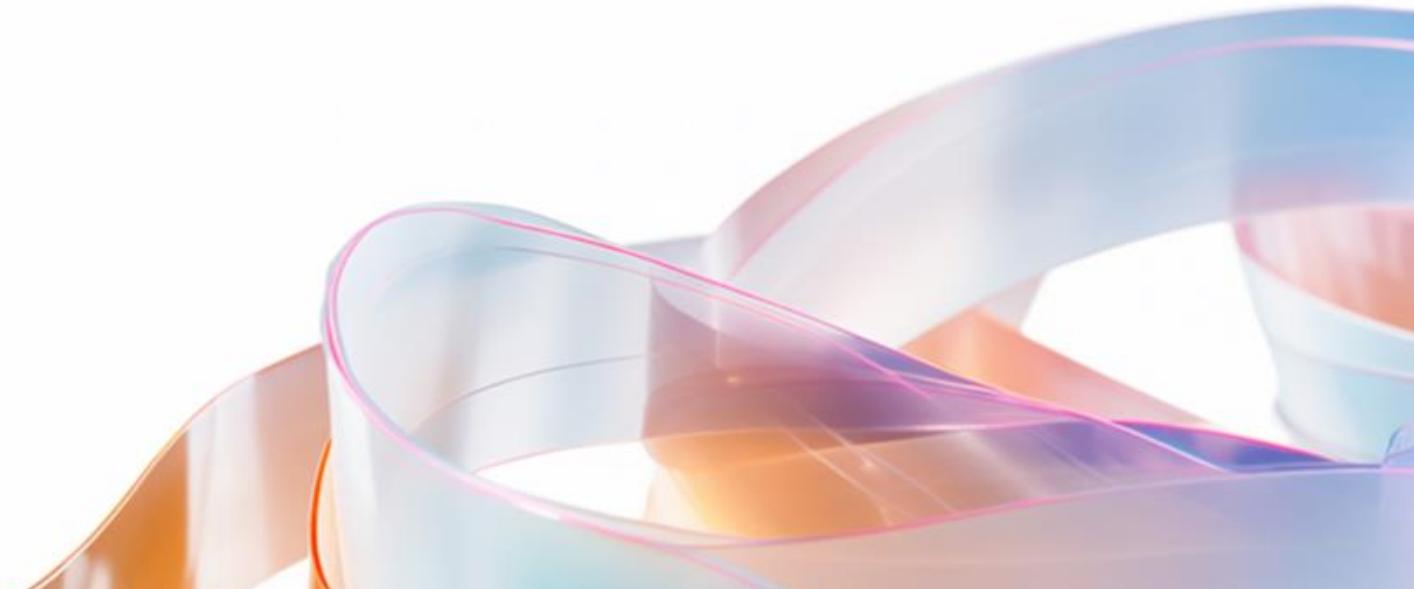
# Chat with your data workshop



# Microsoft Copilot



# Objective of the workshop



# Schedule

- **9:00-10:00**
  - Workshop intro & setup
- **10:00-10:30**
  - Clean data with Copilot
- **10:30- 11:00**
  - Morning break
- **11:00-11:30**
  - Create DAX measures with Copilot
- **11:30-13:00**
  - Prepare Data for AI
- **13:00-14:00**
  - Lunch
- **14:00-15:15**
  - Standalone Copilot
- **15:15-15:45**
  - Afternoon break
- **15:45-16:30**
  - Limitations, capacity metrics, cost
- **16:30-17:00**
  - Roadmap & questions

# What is Copilot



Chat with your data



AI



# OneLake

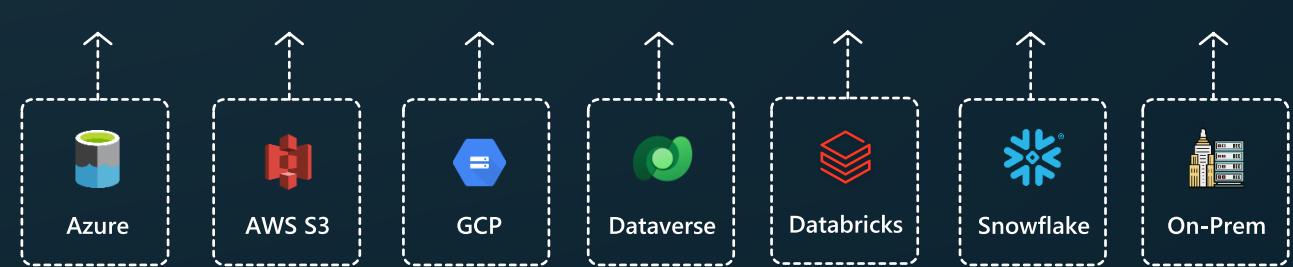
Semantic Models

Lakehouses

Databases

Warehouses

Eventhouses



**Chat with your data allows users in your organization to:**

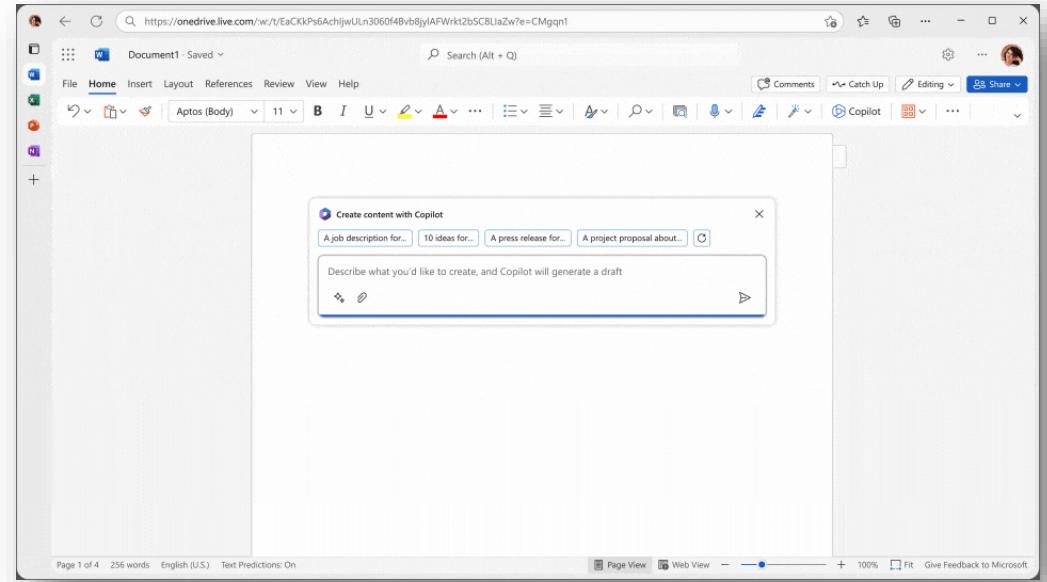
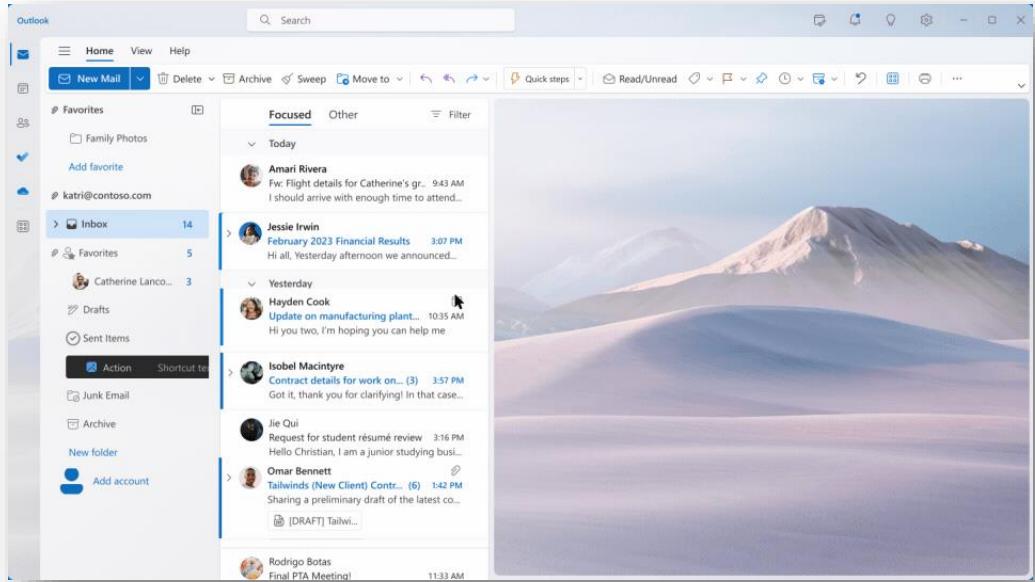
Find the right items to answer their data questions

Get updated intelligent summaries of the data that matters most

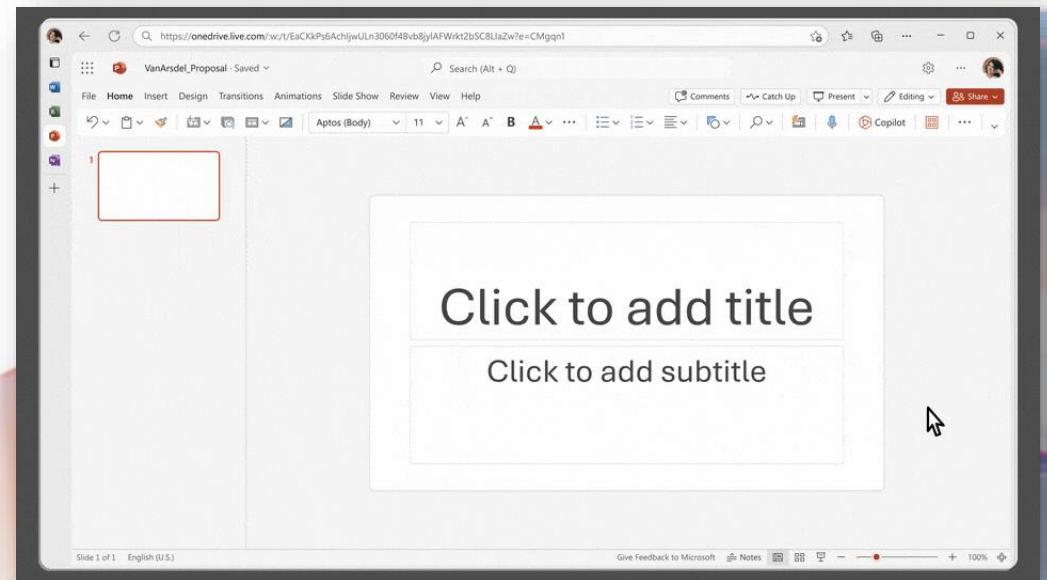
Utilize the latest AI models to get detailed insights and answers from relevant data

Get analytical responses from Data Agents

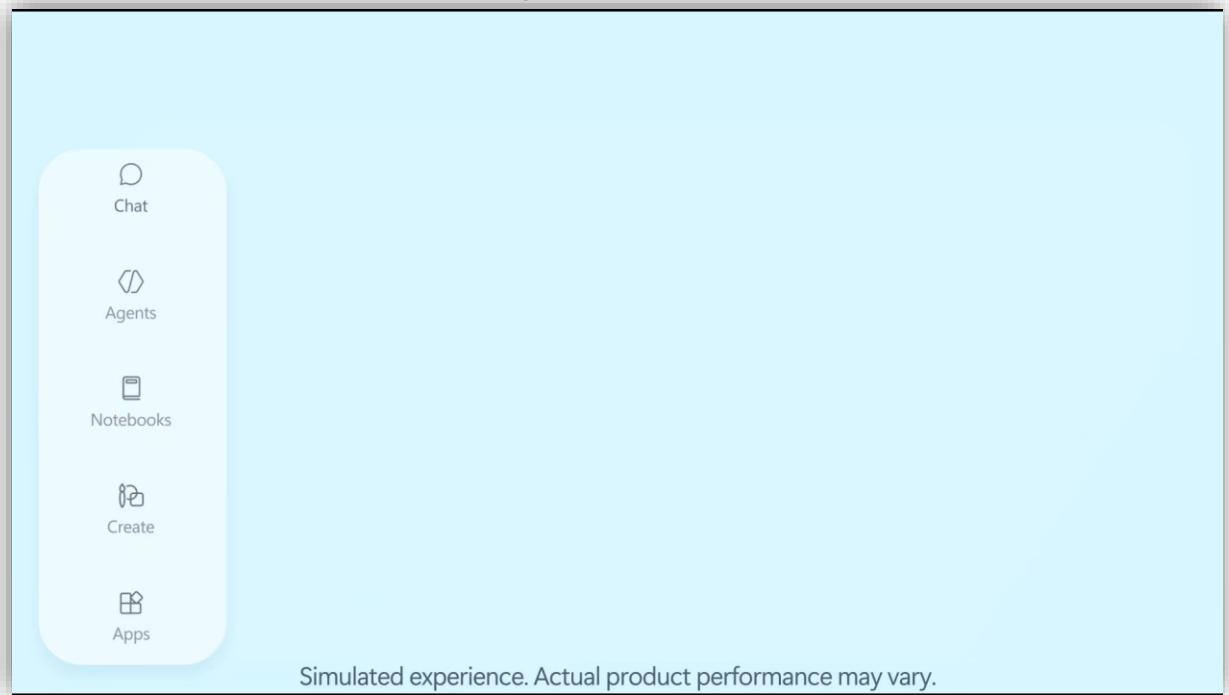
# Copilot in Office



Country	Customer	Product	Discount Band	Units Sold	Manufacturing Price	Sale Price	Gross Sales	Discounts	Sales	COGS
France	VanAradel	Biodegradable Cleaning Products	Low	4345	\$10	\$352	\$1,529,440	\$15,294	\$1,514,146	\$
USA	VanAradel	Biodegradable Cleaning Products	Low	4245	\$10	\$352	\$1,494,240	\$14,942	\$1,479,298	\$
Australia	VanAradel	Biodegradable Cleaning Products	None	4124	\$10	\$352	\$1,451,648	\$0	\$1,451,648	\$
Mexico	VanAradel	Biodegradable Cleaning Products	Medium	3954	\$10	\$352	\$1,391,808	\$83,504	\$1,308,300	\$
France	Contoso Pharmaceuticals	Biodegradable Cleaning Products	Low	4952	\$10	\$127	\$628,904	\$6,289	\$622,615	\$
France	Contoso Pharmaceuticals	Recycled Can	Low	4903	\$5	\$127	\$622,681	\$6,227	\$616,454	\$
Canada	Proseware	Natural Personal Care Products	Low	1954	\$270	\$302	\$590,108	\$5,901	\$584,207	\$
Canada	Proseware	Biodegradable Cleaning Products	High	1990	\$220	\$302	\$600,980	\$84,137	\$516,843	\$
USA	VanAradel	Compostable Food Packaging	Low	1254	\$3	\$380	\$476,520	\$4,765	\$471,755	\$
USA	Proseware	Natural Personal Care Products	Medium	1465	\$224	\$302	\$442,430	\$26,546	\$415,884	\$
USA	Proseware	Sustainable Snack Packaging	Medium	1410	\$120	\$302	\$425,820	\$25,549	\$400,271	\$
Australia	Proseware	Natural Personal Care Products	Medium	1369	\$224	\$302	\$413,438	\$24,806	\$388,632	\$
USA	VanAradel	Compostable Food Packaging	Medium	1052	\$3	\$380	\$399,760	\$23,986	\$375,774	\$
Canada	VanAradel	Compostable Food Packaging	Low	980	\$312	\$380	\$372,400	\$3,724	\$368,676	\$
Australia	Proseware	Sustainable Snack Packaging	Medium	1298	\$120	\$302	\$391,996	\$23,520	\$368,476	\$
Australia	VanAradel	Compostable Food Packaging	None	954	\$3	\$380	\$362,520	\$0	\$362,520	\$
Canada	Contoso Pharmaceuticals	Biodegradable Cleaning Products	Low	2785	\$110	\$127	\$353,695	\$3,537	\$350,158	\$



# Microsoft 365 Copilot



Chat

Pinned

Copilot Good morning Kat! 9:15 AM

Cassandra Dunn 6/2 OC, I'll send an update later

Aadi Kapoor 6/2 You: Great work!

Eric Ishida 8:40 AM Sure, I'll set something for next week ...

Recent

Cortex Framework 8:41 AM Kayo: The review went really well! Can't wait...

Will Little 7:45 AM I don't see that being an issue, can you tell me more?

Marie Beaudouin 12:21 AM Oh, I see, yes let me fix that!

Hillary Reyes 12:07 AM Haha!

Charlotte and Babak 12:48 AM Charlotte: The client was pretty happy with...

Reta Taylor 12:40 AM Ah, ok I understand now

Joshua VanBuren 12:29 AM Thanks for reviewing

Daiichi Fukuda 12:20 AM You: Thank you

Kadji Bell 12:03 AM You: I like the idea, let's pitch it!

Copilot Chat About

Good morning Kat!

Here are some ideas that might help you get started:

- Get a summary of everything you need to catch up on, including meetings
- Find and use info that's buried in documents or lost in conversations
- Create content with all of it—drawing from your files, conversations, events, topics, and more

As your Copilot, I'm here to assist you but I do make mistakes, so sources are provided for your review when possible.

What's going on with EraNext? Summarize the Green Builder's summit doc

# Copilot in Fabric

Home

Get data | New SQL query | New visual query | Query activity | Download SQL database project | Copilot

This warehouse has a default Power BI semantic model for easier reporting. To add warehouse objects to the model, go to Manage default semantic model. [Learn more](#)

Explorer

+ Warehouses

  Demo

    Schemas

    dbo

      Tables

        Date

        Geography

        HackneyLice...

        Medallion

        Time

        Trip

        Weather

      Views

      Functions

      Stored Proced...

    guest

    INFORMATION\_SCHE...

    queryinsights

    sys

  Security

Queries

  My queries

Home

Reporting

Get data | New SQL query | New visual query | New report | New measure | Download SQL database project | Copilot

This warehouse has a default Power BI semantic model for easier reporting. To add warehouse objects to the model, go to Manage default semantic model. [Learn more](#)

Explorer

+ Warehouses

  Demo

    Schemas

    dbo

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        Date

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        HackneyLice...

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        Weather

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      Functions

      Stored Proced...

    guest

    INFORMATION\_SCHE...

    queryinsights

    sys

  Security

Queries

  My queries

    SQL query 1

    SQL query 11

    SQL query 12

    SQL query 13

    SQL query 15

    SQL query 17

    SQL query 19

    SQL query 22

    SQL query 3

Succeeded (3 sec, 605 ms)

Share

Manage default Power BI semantic model

SQL query 13

Run | Save as view | Explain | Fix

Preview: Copilot uses AI. Mistakes can happen. Verify code suggestions before running them. [Review terms](#)

```
1 SELECT TOP 3
2   [G1].[City] AS DropOffCity,
3   COUNT(*) AS DropOffCount
4   FROM
5   [Demo].[dbo].[Trip] AS [T2]
6   JOIN [Demo].[dbo].[Geography] AS [G1]
7     ON [T2].[DropoffGeographyID] = [G1].[GeographyID]
```



## Fabric items that support Copilot experiences



### Fabric capacity



### Data factory



### Dataflows gen2



### Data pipeline



### Data warehousing



### Data warehouse



### Power BI



### Semantic models



### Reports



### Custom copilots



### Data engineering and data science



### Notebooks



### Real-time intelligence



### KQL Queryset



### Real-time Dashboard



### Databases



### SQL database

Showing 1000 rows | Q Search  
Manage default Power BI semantic model

Copilot privacy

Let's work with your data  
Choose an option below or enter a request to get started.

Start writing T-SQL  
What can I do in the Fabric query editor?

Create a table  
Create a table to hold weather data (date, zip, temperature, and rainfall).

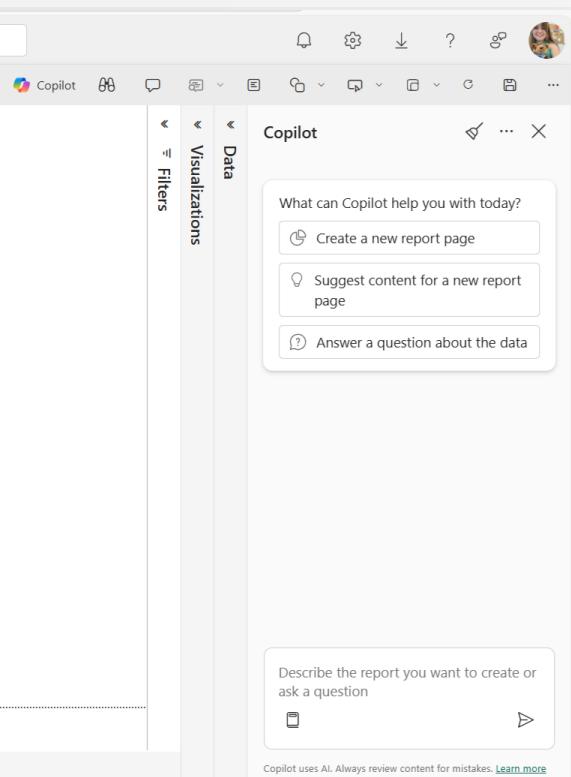
Ask a question  
Suggest questions that I can ask about this warehouse.

Type a request.

Content created by AI may not be accurate or appropriate. Review it carefully before use.

# Copilot in Power BI

data  
o the report canvas.



A screenshot of the Microsoft Power BI Copilot web interface. The top navigation bar includes the Microsoft logo, "Power BI", "Copilot", a search bar, and various settings icons. The main area starts with a greeting "Hi Amanda" and the tagline "Uncover insights in your data with the help of AI". It features three main sections: "Find an item", "Get a summary", and "Ask a question". Each section has three buttons: "Find all the reports about [a topic]", "View semantic models related to [a topic]", "Show me data about [a category]"; "Prep a summary for my team about report", "Summarize key insights in report", "Give a quick overview of this report"; and "Answer a question about data in this report", "Show me [a metric] over time", "What can Copilot help me with?". Below these sections is a large input field with placeholder text "Ask about data in reports, semantic models, or data agents" and a "Add items for better results" button. At the bottom, it says "Copilot uses AI. Always review content for mistakes. [Read terms](#)".

# Copilot in Power BI

Unlock the full potential of your data

52%

Copilot users completed tasks **faster**

36%

Copilot users completed tasks more **accurately**

90%

Copilot users surveyed were likely to continue to **adopt**

SOURCE: Based randomized control trial conducted with n=209 users by Microsoft Corporation in October 2024 that measured four common metrics associated with the consumption experience of Copilot in Power BI, in Microsoft Fabric and compared it to users that did not use copilot. Qualitative sentiment gathered upon task completion. Actual results may vary.

# What is chat with your data? (Cwyd)





...



Uncover insights in your data with the help of AI

Ask a question about your data

+ Add items for better insights ▾



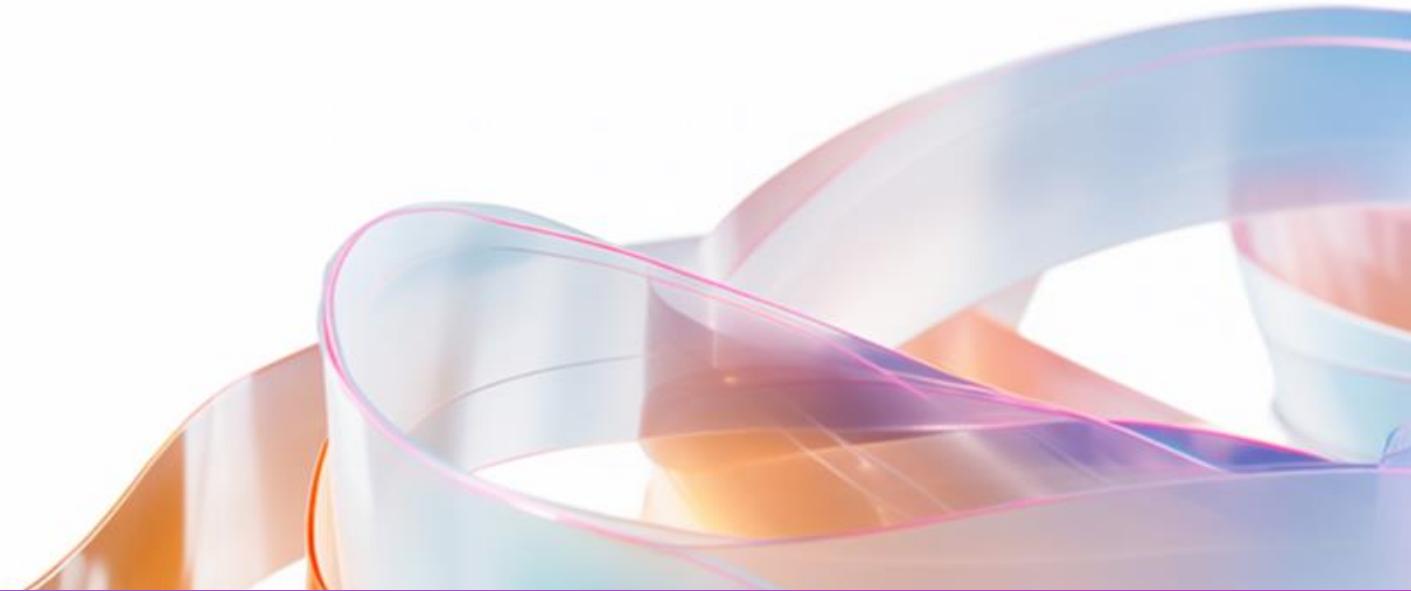
Find reports about [a topic]

Prep a summary for my team  
about report

What can Copilot help me with?

See more ▾

Where can I Chat with my data?





# Where can you use Power BI Copilot?

## The report pane

Sales Performance Analysis

Calendar Year: All | Sales Territory Region: All

Internet Sales - Sum of Sales Amount: 29.36M

Internet Sales - Sum of Sales Amount by Calendar Year:

Calendar Year	Internet Sales - Sum of Sales Amount
2010	0M
2011	~8M
2012	~7M
2013	~15M
2014	0M

Internet Sales - Sum of Total Product Cost: 17.28M

Internet Sales - Sum of Total Product Cost by Calendar Year:

Calendar Year	Internet Sales - Sum of Total Product Cost
2010	0M
2011	~4M
2012	~4M
2013	~9M

Internet Sales - Sum of Sales Amount by Sales Territory Region:

Sales Territory Region	Internet Sales - Sum of Sales Amount
Aus...	~9M
Sou...	~5.5M
Nor...	~4M
Unit...	~3.5M
Ger...	~3M
Fra...	~2.5M
Can...	~2M
Sou...	~1M
Nor...	~1M
Cen...	~1M

Internet Sales - Sum of Total Product Cost by Sales Territory Region:

Sales Territory Region	Internet Sales - Sum of Total Product Cost
Aus...	~5.5M
Sou...	~4M
Nor...	~3.5M
Unit...	~3M
Ger...	~2.5M
Fra...	~2M
Can...	~1.5M
Sou...	~1M

Copilot

Copilot: Uncover insights with the help of AI.

- Recommended
  - What is this report page about?
  - Prep a summary for my team
  - Tell me what Copilot can do
- Understand the data
- Dig deeper
- Write a summary

Ask a question about this report

Copilot uses AI. Always review content for mistakes. [Learn more](#)

You can have Copilot give you...

- Summaries of the data in the report
- Answers from the report visuals
- Answers from the semantic model
- More detailed answers with ad hoc DAX generation



# Where can you use Power BI Copilot?

## *The standalone experience*

The screenshot shows the Power BI Copilot interface. At the top, there's a navigation bar with the Microsoft logo, 'Power BI Copilot', a search bar, and several icons. On the left, a sidebar has a 'Copilot' button highlighted with a red box. Below the sidebar are buttons for Home, Create, Browse, OneLake, Apps, Metrics, Workspaces, My workspace, and Power BI.

In the center, it says 'Hi Amanda' and 'Uncover insights in your data with the help of AI'. There are three main sections: 'Find an item', 'Get a summary', and 'Ask a question', each with a list of prompts. At the bottom, there's a text input field with placeholder 'Ask about data in reports, semantic models, or data agents' and a 'View prompts' button.

Copilot uses AI. Always review content for mistakes. [Read terms](#)

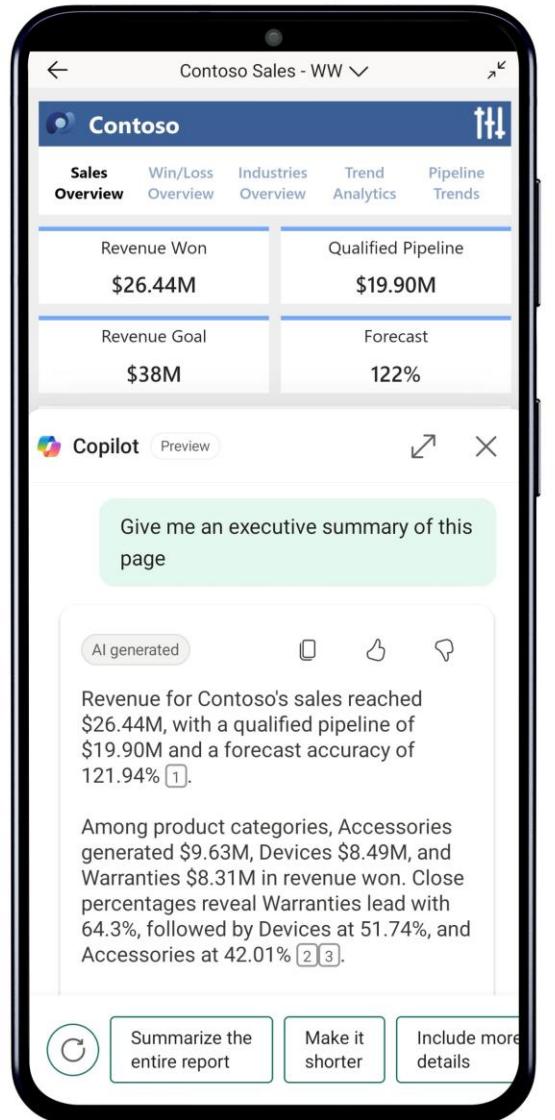
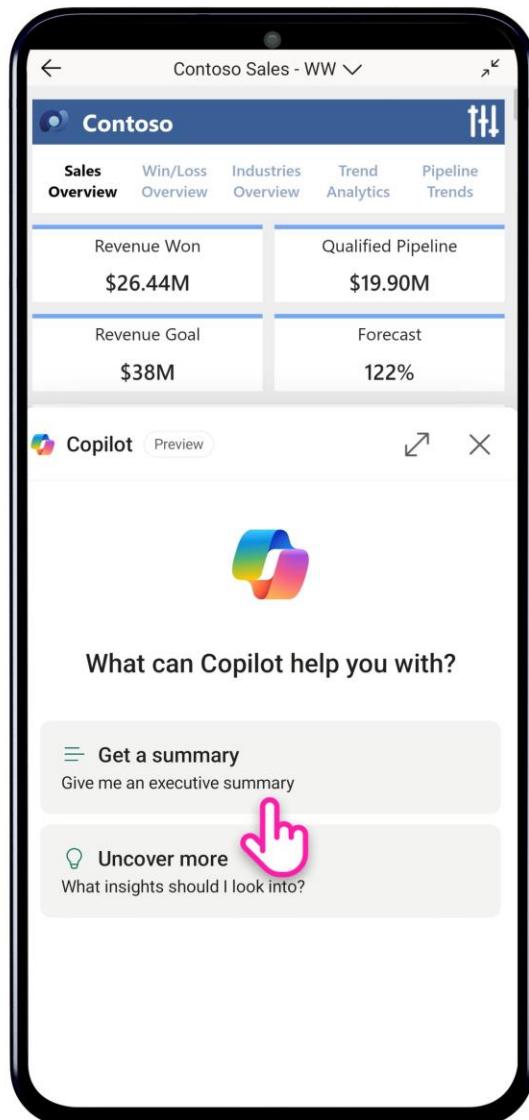
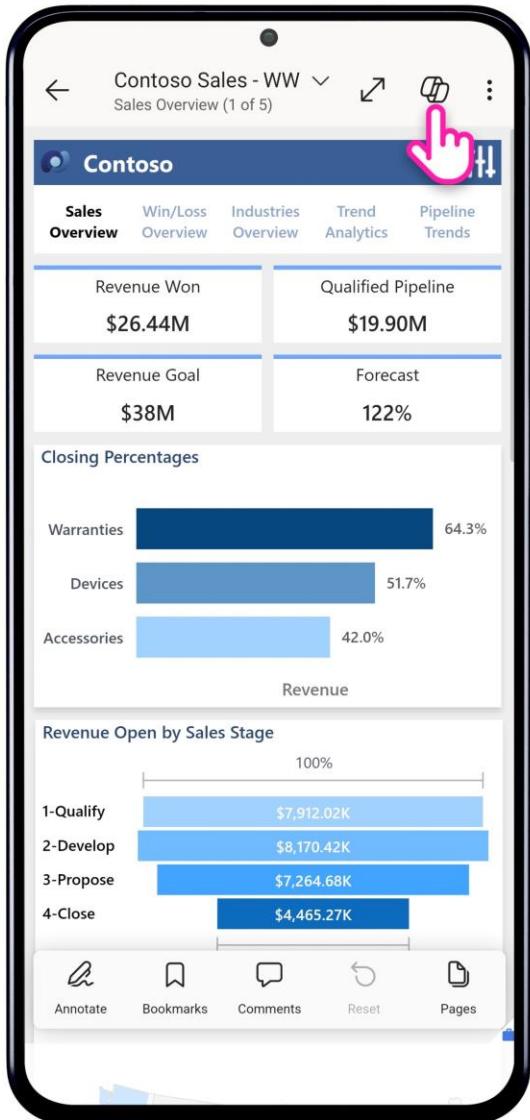
## You can have Copilot ...

- Help you find relevant data
- Provide summaries of the data
- Answer questions from report visuals
- Provide insights from semantic models
- Generate ad hoc DAX queries
- Get answers from Data Agents



# Where can you use Power BI Copilot?

## Power BI Mobile



### You can have Copilot ...

- Give a summary of data in reports
- Uncover additional insights from your data

# How do I access CWYD?



# Access Copilot

Available now



Copilot and AI  
experiences on F2+

Admin must enable Copilot in  
your tenant

Workspace must be on a paid  
fabric capacity (F2+ or P1+)

or

User must be assigned Fabric  
Copilot Capacity (FCC)

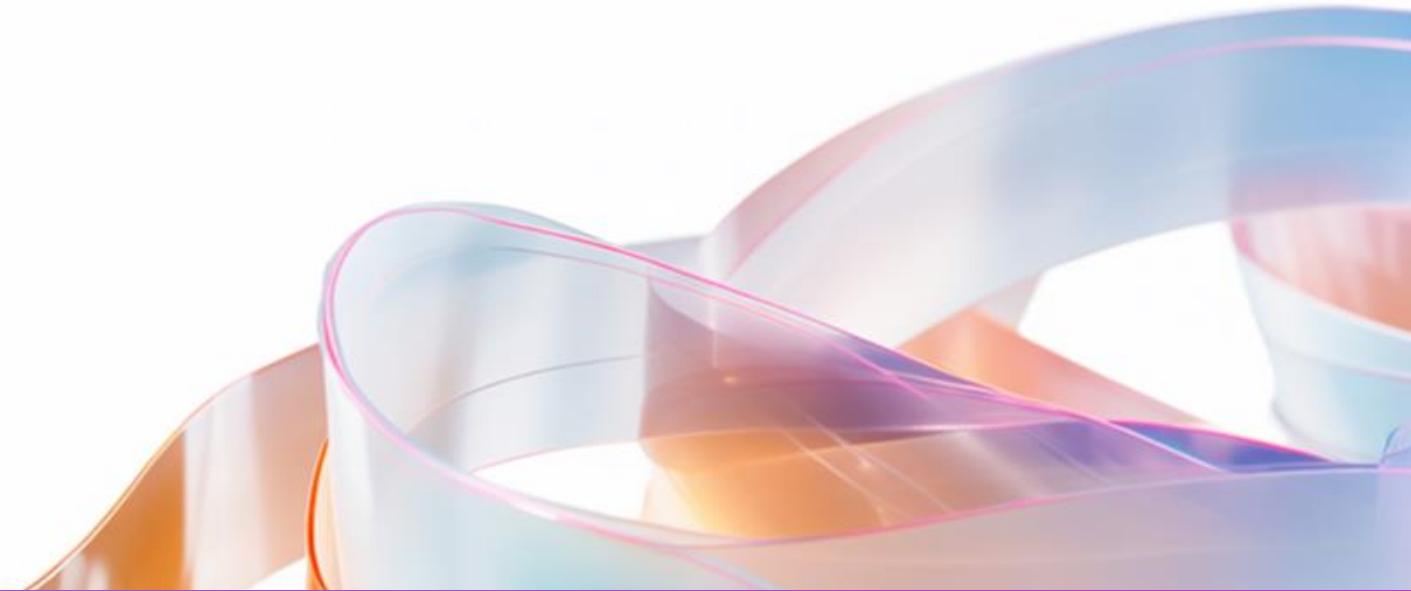
Your tenant must be in  
regions where Fabric  
capacity is available, or  
Admin must enable setting to  
allow data to be processed  
outside your region

Copilot is not available on  
trial or free capacities

Standalone experience  
must be turned on by  
your admin (for now!)

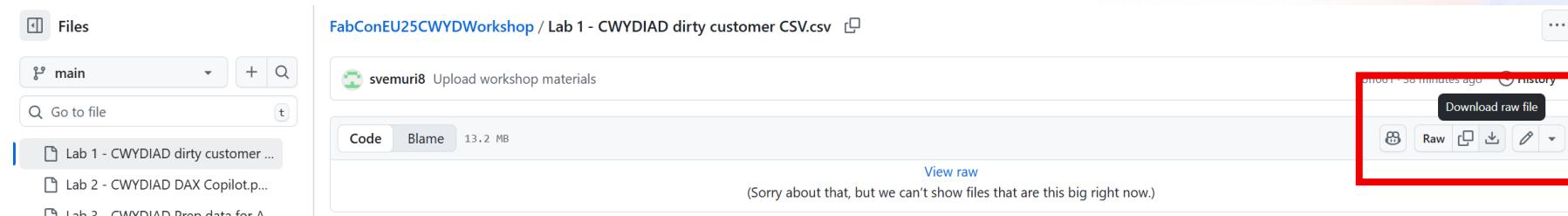
Not supported in GCC

Let's get set up for the labs!



# Lab set-up instructions

1. Visit [aka.ms/CWYDWorkshop](https://aka.ms/CWYDWorkshop) and download all lab materials
  - a) Click on each file in the repo and click "Download raw file" to the right



2. Navigate to [app.fabric.microsoft.com](https://app.fabric.microsoft.com)
  - a) Sign in with the **printed credentials** you were provided on entry
3. Open Power BI Desktop
  - a) Sign into Power BI Desktop with the **printed credential**

If asked to connect to a workspace that supports Copilot, please select randomly from FabConEU5, FabConEU6, FabConEU7, FabConEU8

Utilize Copilot in dataflows to clean  
and transform your data



# Clean and transform data with Copilot in dataflows

- A **dataflow** in Microsoft Fabric is a cloud-based, reusable Power Query process that connects to, transforms, and prepares data for use across multiple reports and datasets.
- This lab will show how to use natural language with Copilot to perform these actions

The screenshot shows the Microsoft Fabric Dataflows interface. On the left, a sidebar lists various workspace categories: Home, Workspaces, Copilot, Omnicube catalog, Monitor, Real-Time, Workloads, FabConCWY DWorkshop, My workspace, and Fabric. The main area displays a Power Query editor for a 'pharma\_messy' dataset. The 'Home' tab is selected. The 'Queries' pane shows a flow from 'Source' to 'Navigation 1'. Below is a table preview with columns: quantity, sales, month, year, month num, date, distributor id, and customer name. The table contains 18 rows of sample data. The bottom status bar indicates 'Columns: 13 Rows: 99+' and 'Default destination: Last run on 8/6/2025 at 9:11 AM'. To the right, a 'Copilot' panel is open with the message 'What would you like to do? I can transform your data or explain how it's being transformed.' It also includes options: 'Get data from...', 'Add a step...', and 'Describe this query'. A text input field at the bottom says 'Describe what you'd like to do'.

# Current lab: Lab 1 - Clean and transform data with Copilot

- **Lab assets located at:** [aka.ms/CWYDWorkshop](https://aka.ms/CWYDWorkshop)
- **Lab name:** Lab 1 – Transform data with dataflows  
Copilot
- **Time until break:** 10:30

Raise your hand if you need help!

Break time!

We will start again at 11!



# Modeling best practices

Copilot's performance is tightly linked to the quality of your semantic model. Key practices include

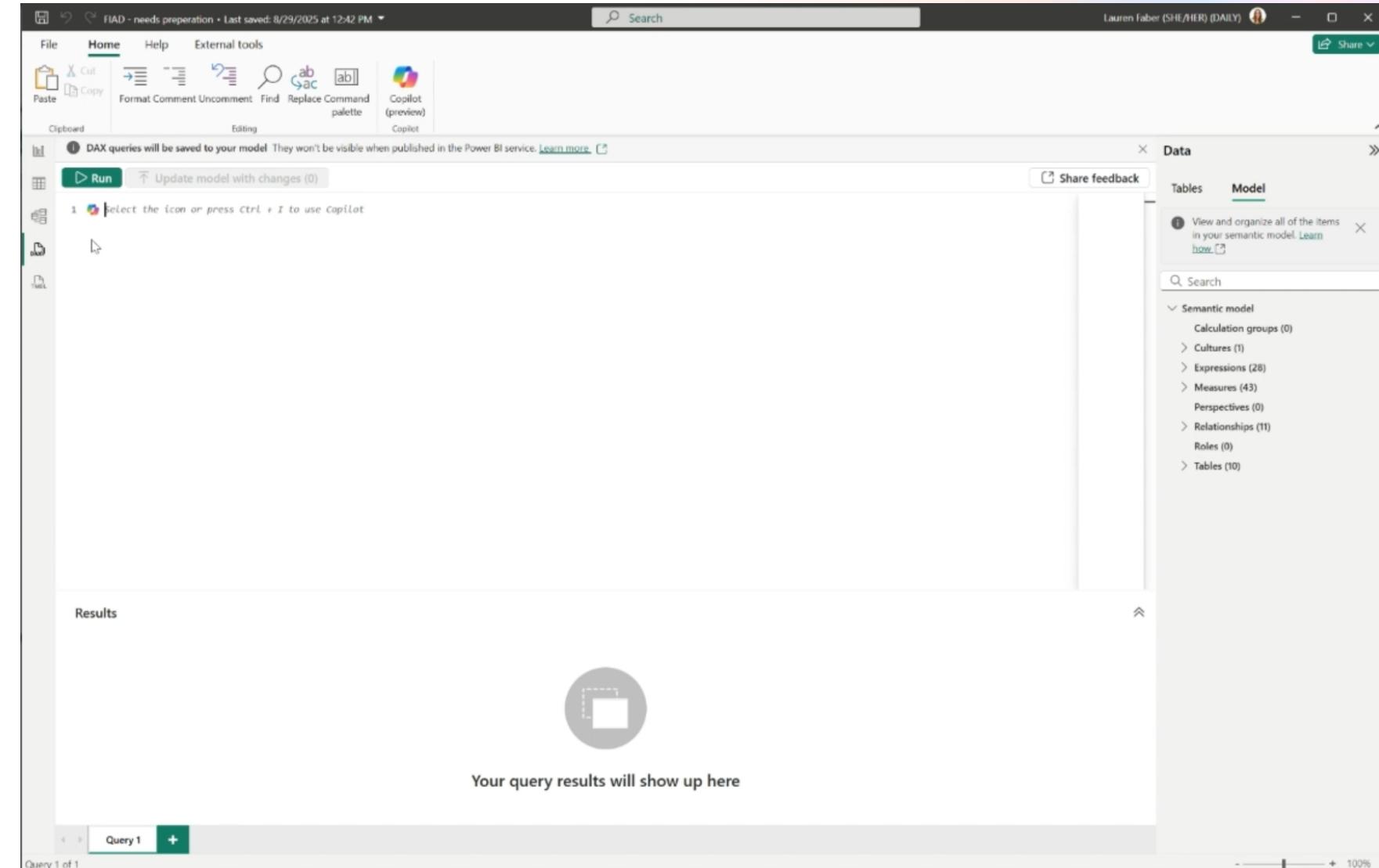
- **Clear human-readable naming conventions:** Avoid ambiguous or overly similar field names. Consistency improves Copilot's ability to interpret prompts accurately.
- **Defined relationships:** Ensure relationships are well-structured and logical (star schema!!). Poorly defined joins or missing keys degrade Copilot's output.
- **Create core measures** – Build essential DAX measures (e.g., *Total Sales*, *Profit Margin*, *Customer Count*) so Copilot has strong building blocks to answer questions.
- **Metadata enrichment:** Add descriptions to model objects, fields, etc. This helps Copilot understand context and improves prompt responses.

# Create DAX measures with Copilot



# Create DAX measures with Copilot

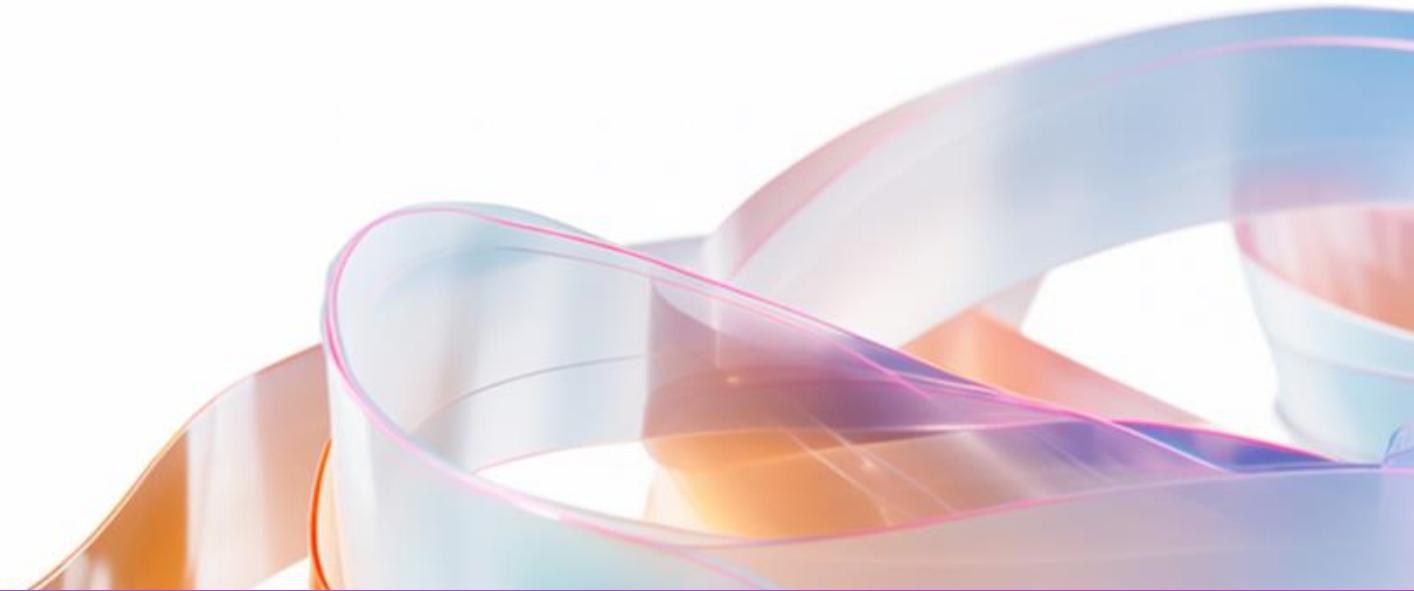
- A **DAX measure** is a calculated metric created using the DAX language that performs dynamic aggregations or calculations on your data, such as sums, or averages.
- This lab you'll utilize Copilot to create your own measures.



# Current lab: Lab 2 - Create DAX measures with Copilot

- **Lab assets located at:** [aka.ms/CWYDWorkshop](https://aka.ms/CWYDWorkshop)
- **Lab name:** Lab 2 – CWYDIAD – DAX QV and CP report page
- **Time until next section:** 11:30
- **Bonus lab:** Create page with Copilot (included in the lab file if you have extra time)
  
- Raise your hand if you have questions!

# Prepare data for AI



# Prep data for AI

**Prep data for AI** allows semantic model author to curate, fine-tune, and prepare data to be ready for Copilot consumption.

- **AI data schema:** Allows model authors to define a dedicated schema specifically for Copilot, making it easier for AI to understand which tables, fields, and relationships are most relevant.
- **Verified answers:** Enables you to link a question users ask to a specific visual, allowing Copilot to produce a verified answer vetted by a human.
- **AI instructions:** Provides important context about your data model, helping Copilot generate responses that are more accurate and aligned with your intent.

# AI data schema

Helps Copilot to focus on the right data by only exposing what Copilot needs to see

- 1. Visibility level** - Consumers of your semantic model can't see the AI data schema set on the model.
- 2. Scope of capability** - The AI data schema isn't considered for Copilot capabilities that don't use the model schema. For example, when Copilot is giving a summary of the report or answering a question directly from the report page.
- 3. Hidden state** - All fields available in the semantic model appear in the AI data schema selection pane regardless of visibility set on the semantic model.
- 4. Hierarchies always respected** - If a hierarchy is included in the AI data schema, but a column of the hierarchy isn't selected as part of the table, the column is still included as part of the Copilot schema.
- 5. Relationships always respected** - Relationships are still respected regardless of the AI data schema set. For example, if two fields are related, and one of the fields is included in the AI data schema, Copilot can still return answers that require that relationship.
- 6. No end-user control** - End-users can't disable the AI data schema.
- 7. Not a security feature** - do not use AI data schema as a security feature, it's a suggestion to Copilot for the schema to use when answering questions

## Simplify the data schema (preview)

Improve response accuracy by deselecting fields Copilot doesn't need

 Filter by keyword

  FIAD - final for standalone

  Customer

  Date

  Geo

  People

  PO

  Product

  ProductDetails

  Reseller

  Sales

  Supplier

# Verified answers – 12 tips

## 1. Use both exact and semantic trigger phrases

– Provide 5–7 representative triggers per verified answer to cover different but valid ways users may ask the same question.

## 2. Keep semantic matches realistic –

Synonyms, word order changes, and filters in prompts work, but adding/removing fields or swapping measures does not.

## 3. Select supported visuals and models –

Verified answers only work with supported visual types (no AI visuals, decomposition tree, etc.) and supported models (Import, Direct Query, Composite, Direct Lake in service).

## 4. Ensure fields and filters are visible –

Hidden fields or locked filters break verified answers. Make sure schema selection includes all fields you expect Copilot to use.

## 5. Configure filters correctly –

Filters must be set to “All” in the report, visible to end users, and within the supported types (basic categorical, some advanced categorical, date range). Limit to 10 filters during creation, 3 at runtime

Ground Copilot and have Copilot provide answers blessed by the model author

Verified answers (preview)

← All verified answers

Phrases connected to verified answers

Add phrases people might use when asking about the model data, and Copilot will respond with this visual. Test your phrases out in the chat before publishing.

How do sales trend over time?

Copilot suggestions

Which months have the highest sales?

Which months have the lowest sales?

Refresh

Copilot uses AI. Always review content for mistakes. [Read terms](#)

Visual ⓘ

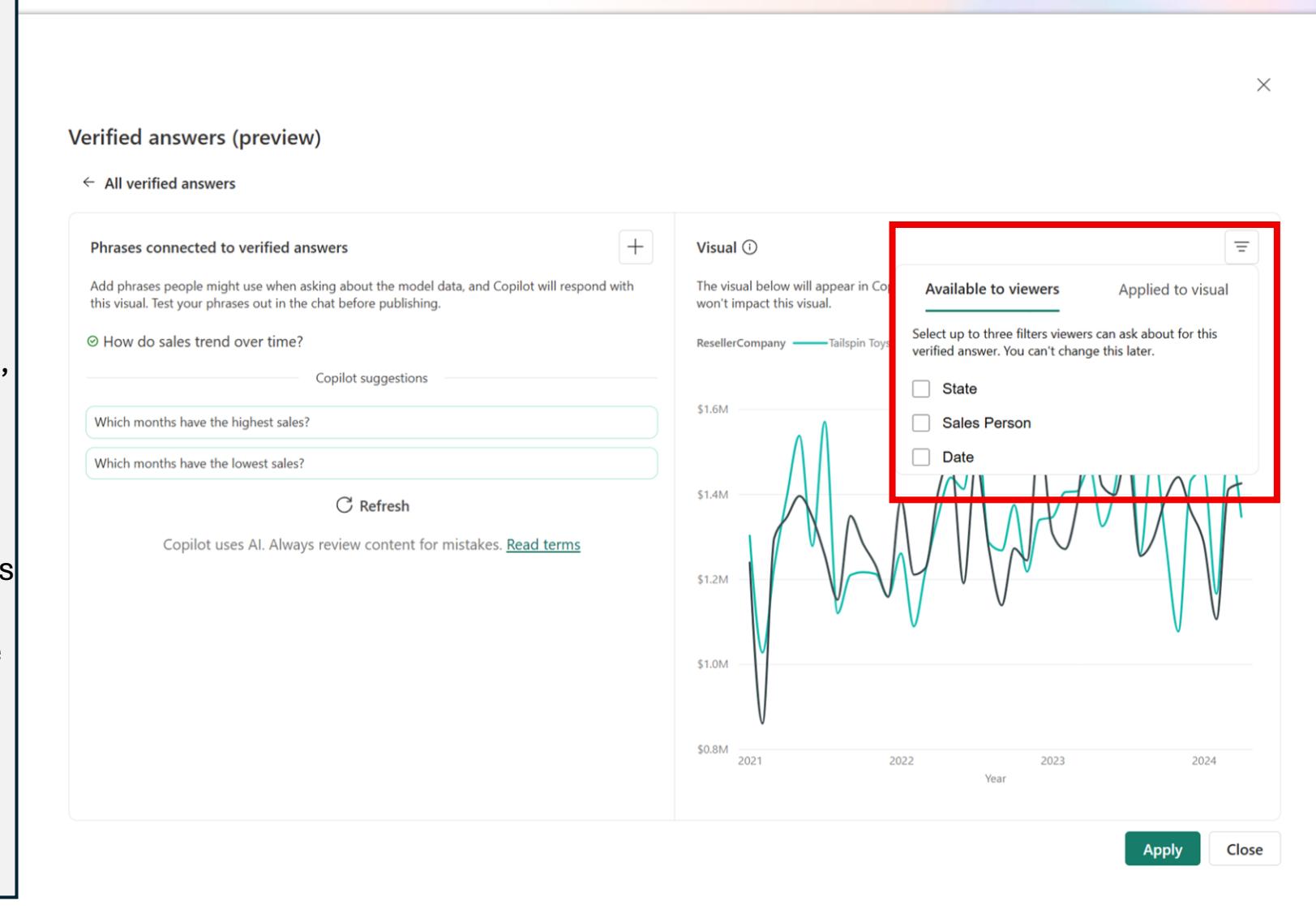
The visual below will appear in Copilot. It won't impact this visual.

ResellerCompany — Tailspin Toys

Available to viewers      Applied to visual

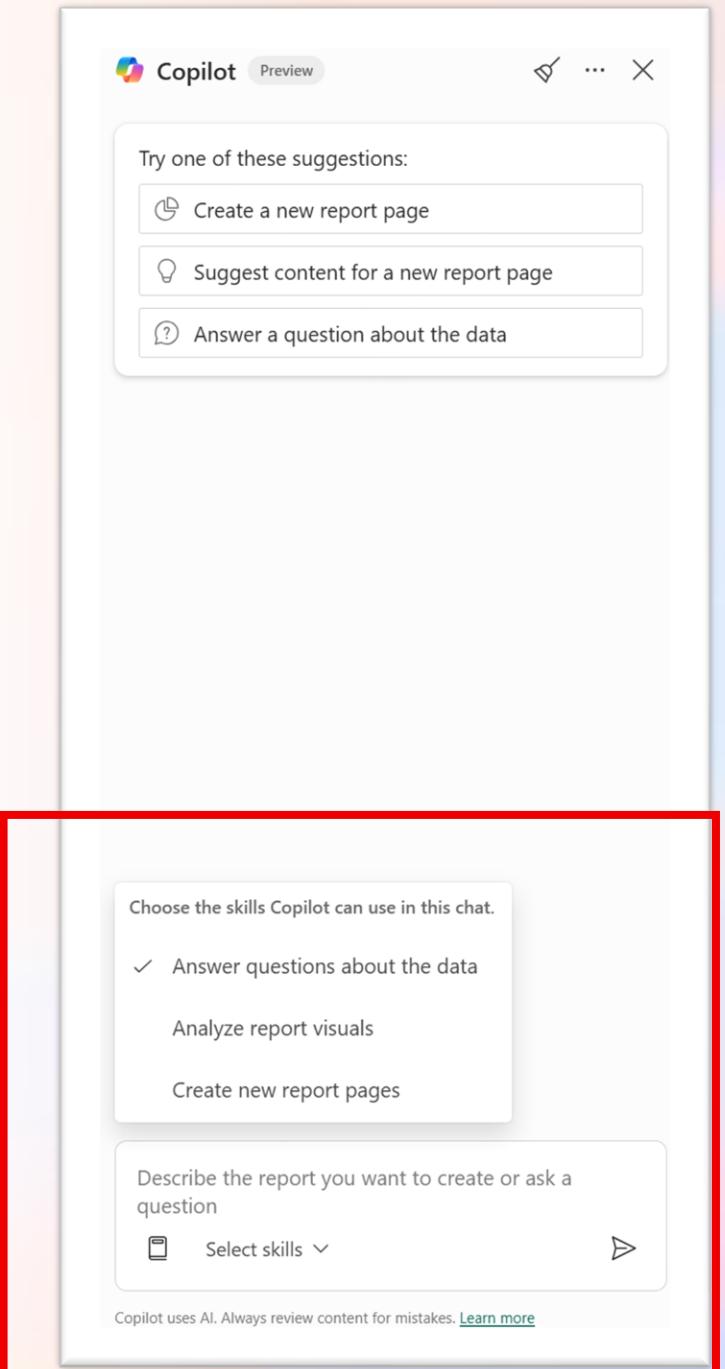
Select up to three filters viewers can ask about for this verified answer. You can't change this later.

State  
 Sales Person  
 Date



# Verified answers cont'

- 6. Understand answer persistence** – Verified answers are tied to the semantic model, not the original report visual. Editing or deleting the report visual doesn't update the verified answer—manage updates in the Verified Answer setup dialog.
- 7. Test carefully with the skill picker** – In desktop, disable authoring skills like “create page” to mimic end-user Copilot behavior and validate your verified answers trigger correctly.
- 8. Communicate clearly with users** – Verified answers show a checkmark, matched phrase, and “how Copilot arrived at this.” Make sure these elements are accurate and trustworthy for confidence building.
- 9. Stay within limits** – Each model supports up to 250 verified answers, 15 trigger phrases per answer, and 500 characters per trigger. Respect these caps for reliability.
- 10. Publish and validate in service** – After creating verified answers in desktop, publish to service and allow ~15 minutes for them to appear. A small edit in service (like tweaking a trigger phrase) can speed up sync.
- 11. Select the visual first** – the “Set up Verified Answer” option only appears when a visual is selected.
- 12. Manage through the Verified Answers dialog** – edits to report visuals won't update Verified Answers; use the management dialog or recreate them.



# AI instructions

Give business context and instructions for Copilot to use to provide better answers

1. **Be explicit and specific.** Assume Copilot has no understanding of how to use the data model or business context for your data.
2. **Use analogies and descriptive language** to help the model understand your desired outcome.
3. **Avoid ambiguity.** If something should be emphasized - or avoided - be clear. The more details and supporting content you can provide Copilot, the better.
  1. **Example:** For Total Active Partners, use the measure "Monthly Active Partner Count" (do NOT filter on "Customers" table).
4. **Group related instructions.** Organizing instructions by theme or purpose (that is, date logic, key metrics, industry terms) can help Copilot better understand your intent. Including structural elements, such as sections, hierarchies, and headers, can be very beneficial.
5. **The order in which you author instructions can impact the output received.** Testing out different variations, orders, examples, and wording can help you get the correct outputs.
6. **Break down complex instructions into simpler steps** to improve clarity and reduce errors.
7. **Keep instructions focused.** Depending on the model and instructions set, sometimes less is more. Conflicts and complexity in instructions can cause confusion for the large language model (LLM).

 Prep data for AI

Get started  
Simplify the data schema  
Verified answers  
**Add AI instructions**

 Add AI instructions (preview)

Provide context on important data fields, business goals, and industry terms to improve Copilot insights

If asked about "highest" or "most" or "best selling" product first clarify if the user wants product by Best selling product = item with the highest total units sold  
Highest selling product = product with the highest total dollar sales  
Busy season is September to December  
When asked about sales default to using the Sales calculation from the sales table  
When asked about units sold default to using the Unit measure from the Sales table  
Customers are resellers  
We sell our products to resellers who then sell to customers. We only care about our sales to resellers  
When asked about line profit look use the LineProfit calculation from Sales

# Prep data for AI in the service



Microsoft | Hawaii Tourism with Copilot | Non-Business

Search

Trial:  
15 days left

Home Copilot Create Browse OneLake catalog Apps Metrics Monitor Learn Real-Time Workloads Workspaces Copilot Demo123 Power BI

## Prep data for AI

Get started

- Simplify the data schema
- Verified answers
- Add AI instructions

Prep this model to be AI-ready

Improve Copilot insights about this semantic model in a few simple steps. Your changes will apply to all Copilot chats, but updates may take a moment.

[Learn more](#)

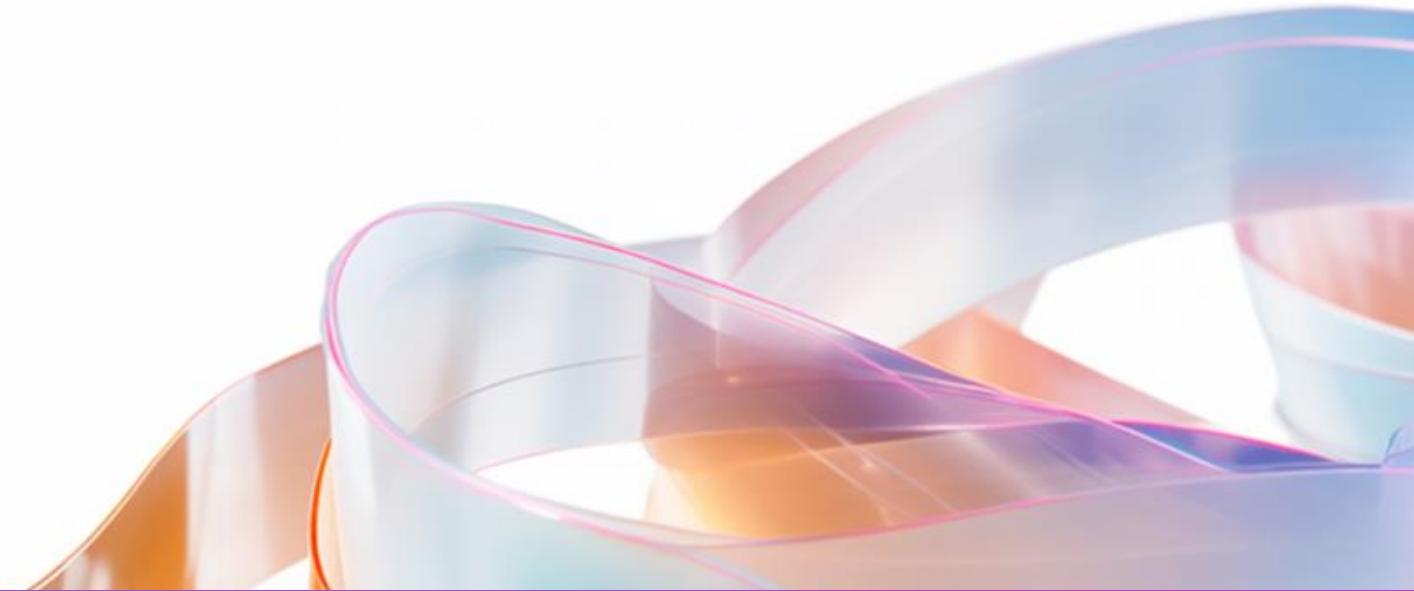


**Simplify the data schema**  
Improve response accuracy by deselecting fields  
Copilot doesn't need to analyze.

**Verified answers**  
Save predefined responses for your most critical business topics.

**Add AI instructions**  
Help Copilot understand industry terms, business priorities, and important data fields.

# Prep data for AI lab



# Prep data for AI

- Allows **semantic model authors** to fine-tune data to get the most from Copilot
- In this lab you'll fix the wrong answers Copilot was providing through utilizing prep data for AI features

FAB - final for standalone • Last saved: 9/3/2025 at 8:58 AM

Lauren Faber (SHE/HER) (DAILY)

Home Insert Modeling View Optimize Help External tools

Cut Copy Get data Excel OneLake SQL Enter Data Refresh Recent sources Transform data New visual Text box More visual New visual calculation New measure Quick Sensitivity Publish Prep data for Copilot AI Copilot

**Fabrikam Company**  
Sales Report

Sales over time

Sales Territory

Sales YoY% by Year, Quarter and ResellerCompany

Sales by Product Group and ResellerCompany

Visualizations Data

Filters

Build visual

Customer Date Geo People PO Product ProductDetails Reseller Sales Supplier

Values Add data fields here

Drill through Cross-report Keep all filters Add drill-through fields here

Sales Report X Product Detail Units Sold Detail Highest Selling Product Best Selling Product +

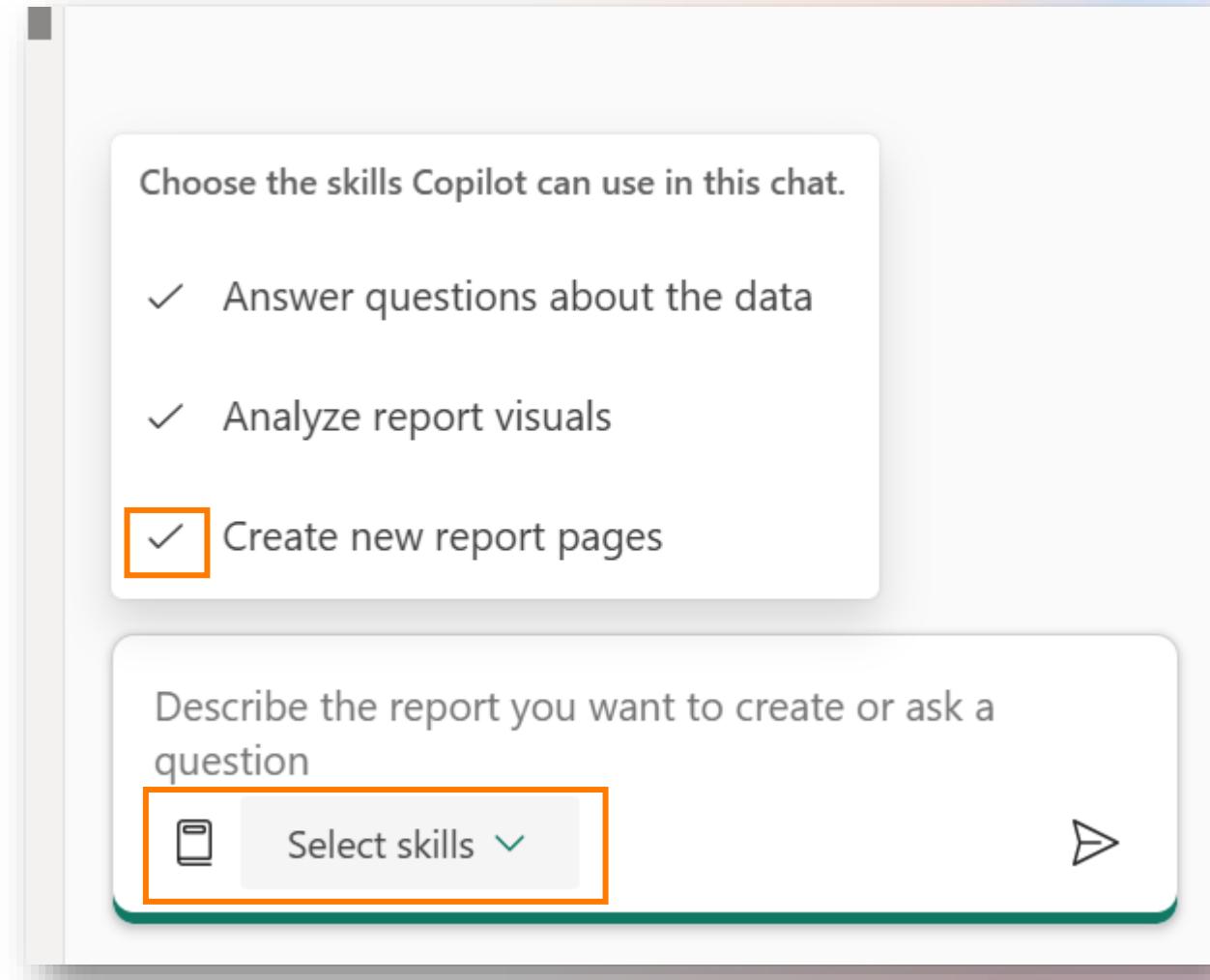
Page 1 of 5 Non-Business

96% 11:58 AM 9/5/2025

The screenshot displays a Microsoft Power BI desktop application window. The main area shows a "Sales Report" for the "Fabrikam Company". It includes several visualizations: a card with summary data (Sales: \$105,724,059, Sales Orders: 43,303, Margin: \$52,590,399), a line chart titled "Sales over time" comparing "Taipin Toys" (orange) and "Wingtip Toys" (dark blue) from Jan 2021 to Jan 2024, a map of the United States showing "Avg Order Size" by region, a bar chart titled "Sales YoY% by Year, Quarter and ResellerCompany" for 2022 and 2023, and a scatter plot of "Sales" vs. "Sales Orders". The top ribbon shows the "Home" tab is selected. The right side of the screen features the "Visualizations" and "Data" panes, which contain lists of available data sources and fields. The bottom of the screen shows the Windows taskbar and system tray.

# Prep data for AI – skill picker

- Troubleshoot Copilot with the Skill picker
- Located at the bottom of the Copilot report pane
- Isolate Copilot to specific skills
- Only available in Power BI Desktop





**Sales Detail:** ResellerCompany Product Group Supplier  
Tailspin Toys Packaging Materials Litware Inc

### Sales by State

State	Sales
New York	\$2.0M
Texas	\$2.0M
Washington	\$1.7M
California	\$1.5M
Minnesota	\$1.4M
New Jersey	\$1.2M
Pennsylvania	\$1.2M
Missouri	\$1.1M
Ohio	\$1.1M
Colorado	\$1.0M
Florida	\$1.0M
Alabama	\$1.0M
Near Mexico	\$0.9M
Total	\$11.7M

### Product Details

Product	Units Sold	Unit Price	Sales	In Stock	Future Orders
Black and orange fragile despatch tape 48mmx75m	67,176	\$3.70	\$248,551	91,948	46,300
Black and orange fragile despatch tape 48mmx100m	63,036	\$4.10	\$258,448	94,966	33,306
Clear packaging tape 48mmx75m	50,284	\$2.90	\$145,624	86,805	74,976
Black and yellow heavy despatch tape 48mmx75m	49,248	\$3.70	\$182,218	46,646	90,444
Shipping carton (Brown) 413x285x187mm	48,000	\$1.05	\$50,400	85,706	49,721
Black and orange handle with care despatch tape 48mmx75m	47,280	\$3.70	\$174,936	109,608	28,312
Shipping carton (Brown) 457x457x457mm	46,700	\$2.10	\$98,070	72,283	55,393
Shipping carton (Brown) 356x356x279mm	46,075	\$2.04	\$93,993	92,259	49,323
Express post box 5kg (White) 350x280x130mm	46,000	\$0.95	\$43,700	97,108	36,293
Black and orange this way up despatch tape 48mmx75m	45,864	\$3.70	\$169,697	101,216	79,766
Shipping carton (Brown) 500x310x310mm	45,700	\$2.55	\$116,535	118,434	47,587
3 kg Courier post bag (White) 300x190x95mm	45,600	\$0.66	\$30,096	47,992	75,233
Shipping carton (Brown) 356x229x229mm	45,300	\$1.14	\$51,642	78,821	39,491
Red and white urgent despatch tape 48mmx75m	44,088	\$3.70	\$163,126	95,307	37,590
Shipping carton (Brown) 279x254x217mm	43,400	\$1.11	\$48,174	62,765	63,675
Black and orange glass with care despatch tape 48mmx100m	43,056	\$4.10	\$176,510	70,729	62,788
Shipping carton (Brown) 457x279x279mm	42,750	\$1.28	\$54,720	40,650	67,793
Black and white brownie chocolate bars 48mmx100m	42,526	\$4.10	\$174,562	80,725	64,743
<b>Total</b>	<b>1,773,960</b>		<b>\$31,007,432</b>	<b>7,186,247</b>	<b>3,509,284</b>

Copilot Preview

Try one of these suggestions:

- Create a new report page
- Suggest content for a new report page
- Answer a question about the data

Describe the report you want to create or ask a question

Select skills

microsoft my.sharepoint.com is sharing your screen. Stop sharing Hide

Copilot uses AI. Always review content for mistakes. Learn more

# Current lab: Lab 3 - Prep data for AI

- **Lab assets located at:** [aka.ms/CWYDWorkshop](https://aka.ms/CWYDWorkshop)
- **Lab name:** Lab 3 – CWYDIAD Prepare data for AI
- **Lunch break:** 13:00

Raise your hand if you have questions!

Lunch time!

We will start again at 14:00!



# Wrapping up prep data for AI



# Prepped for AI Setting

Marking a semantic model as **Prepped for AI** tells Copilot it's a good item to use. *We boost prepped items in the search list, and we won't show content warnings on answers that use prepped data.*

The screenshot shows a user interface for marking a semantic model as 'Prepped for AI'. At the top, there is a section titled 'Featured Q&A questions' with a 'Featured' button. Below it is a section titled 'AI preparation' with a red border. Inside this section, there is a descriptive text: 'Mark this model as prepped for AI when it's ready for use with Copilot. This action clears any warnings about incomplete data prep for the model and its connected reports.' followed by a 'Learn more' link. There is a checkbox labeled 'Prepped for AI', which is currently unchecked. At the bottom of the section are two buttons: 'Apply' and 'Discard'.

▷ Endorsement and discovery

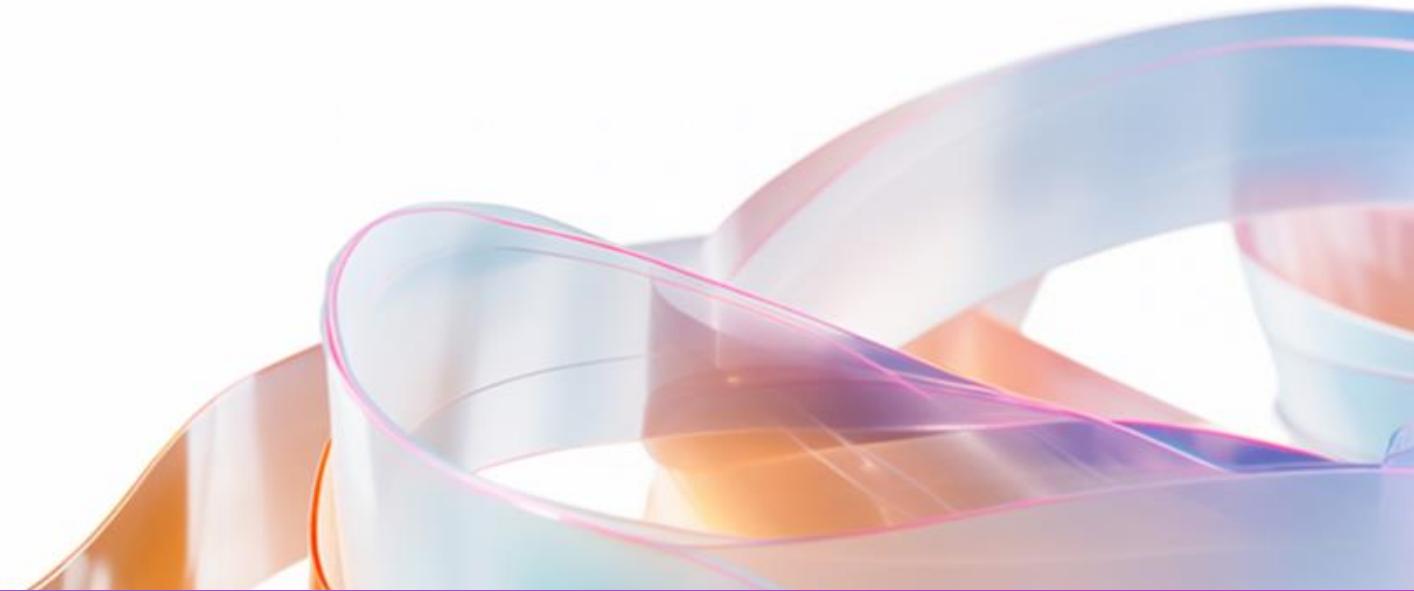
Find this switch in the **AI preparation** section of semantic model settings

# Warnings on unprepped data

We provide content warning on answers that use data from an unprepped semantic model

The screenshot shows a user interface for an AI-generated answer. At the top left is the Copilot logo, followed by the word "Copilot" and a small note "AI-generated content may be incorrect". Below this is a message: "This answer might be low quality since the data needs AI prep. Open the report to vet the results and ask the data owner to prep the data for AI. [Learn more](#)". At the bottom are three buttons: "Open report", "View answer", and two thumbs-up/thumbs-down icons.

# Copilot in the Standalone experience



# There's a lot of data, and not a lot of time

How can users look through all their artifacts and find answers to their data questions quickly?

# Enter ⚡ Standalone Copilot ⚡

The screenshot shows the Power BI Copilot interface. On the left, a vertical sidebar lists various features: Home, Copilot (which is selected and highlighted in blue), Create, Browse, OneLake catalog, Apps, Metrics, Monitor, Learn, Real-Time, Workspaces, My workspace, and Power BI. The main area is titled "Copilot Preview". It features a search bar at the top right. Below the search bar, there's a trial status message: "Trial: 17 days left". To the right of the trial message are several icons: a user profile with a green badge (12), a gear, a download arrow, a question mark, a help icon, and a user icon. A "Clear chat" button is also present. The central part of the screen displays the "Hi Tori" logo and the tagline "Uncover insights in your data with the help of AI". Below this, there's a large input field with the placeholder "Ask a question about your data" and a button "+ Add items for better insights". To the right of the input field is a large arrow pointing right. Below the input field, there are three cards with icons and text: "Find reports about [a topic]" (document icon), "Prep a summary for my team about report" (pencil icon), and "What can Copilot help me with?" (question mark icon). At the bottom right of the main area, there's a "See more" link.

# Standalone Copilot capabilities



# Capability: Search

The screenshot shows the Power BI Copilot interface. On the left is a vertical navigation bar with icons for Home, Copilot (highlighted), Create, Browse, OneLake catalog, Apps, Metrics, Monitor, Learn, Real-Time, Workspaces, and My workspace. The main area has a search bar at the top. Below it is a section titled "Hi Tori" with the subtext "Uncover insights in your data with the help of AI". A large button says "Ask a question about your data" with a "Clear chat" link. Below this are three cards: "Find reports about [a topic]" (highlighted with a red box), "Prep a summary for my team about report", and "What can Copilot help me with?". A "See more" link is at the bottom right.

Find the right:

- ✓ Models
- ✓ Reports
- ✓ Data Agents
- ✓ Apps

Trigger with a  
Search question  
or data question  
without a report  
attached

# Copilot can help you find data content on a topic

Find items about Hawaii tourism

 Copilot | AI-generated content may be incorrect

Sure, I found this data agent and these reports.

1.  [Hawaii Tourism](#)

Workspace: PBIFabricDoNotDelete

The report analyzes Hawaii tourism trends, including visitor numbers, spending, trip length, and purposes across islands and regions over time.

This report is prepped for AI and was matched on the title and its contents. You also favored this.
2.  [Hawaii Tourism Spending Analysis](#)

Workspace: PBIFabricDoNotDelete **Endorsement: Promoted**

The report examines Hawaii tourism spending trends by island, month, and region, highlighting visitor arrivals, expenditures, and seasonal variations, with a focus on Maui.

This report is prepped for AI and endorsed, and was matched on the title and its contents.
3.  [Hawaii Data agent](#)

Workspace: PBIFabricDoNotDelete

This data agent is prepped for AI and was matched on the title and its contents.
4.  [HawaiiTourism-Copy](#)

Workspace: PBIFabricDoNotDelete

The report analyzes visitor arrivals, trip purposes, expenditures, and trip lengths across islands and regions, showing trends and spending patterns over time.

This report is prepped for AI and was matched on the title.
5.  [Hawaii Tourism Verified Answers Categorical](#)

Workspace: PBIFabricDoNotDelete

Report containing verified answers prompts to help answer questions about hawaii tourism over the years.

This report was matched on the title, the description and its contents.

Give me an overview of 1. Hawaii Tourism

What are the key metrics in 2. Hawaii Tourism Spending Analysis?

 View prompts

Ask a question about your data

+ Add items for better insights 

Copilot uses AI. Always review content for mistakes. [Read terms](#)

- Items are linked to open in new tabs
- LLM-gen captions describe reports
- Core item metadata (like workspace & endorsements)
- Context on why this item was returned
- Suggested questions for next actions with Copilot

# Or ask a question, and it will suggest items to answer

How many tourists visited Maui in January?

Copilot AI-generated content may be incorrect

I found several items that could help answer your question. Which item should I use?

**Items with related verified answers ⓘ**

1. [Hawaii Tourism Spending Analysis](#)  
Workspace: PBIFabricDoNotDelete  
Verified answer for: How do arrivals change by month for Maui?
2. [Hawaii Tourism](#)  
Workspace: PBIFabricDoNotDelete  
Verified answer for: What is the trend in Hawaii travel and visits?
3. [HawaiiTourism-Copy](#)  
Workspace: PBIFabricDoNotDelete  
The report analyzes visitor arrivals, trip purposes, expenditures, and trip lengths across islands and regions, showing trends and spending patterns over time.  
This report is prepped for AI and was matched on its contents.

Use 1. Hawaii Tourism Spending Analysis   Use 2. Hawaii Tourism   Use 3. HawaiiTourism-Copy   View prompts

Ask a question about your data

+ Add items for better insights →

Copilot uses AI. Always review content for mistakes. [Read terms](#)

- Related verified answers are surfaced at the top of the list
- To select an item to answer from, the pills at the bottom can be used, or the user can type “Use 1”

# What can Copilot search?

*All content that the user has access to in Power BI:*

## Semantic Models

- Tables
- Columns
- Measures
- Verified Answers

## Reports

- Page names
- Visual titles
- Filter pane titles
- Canvas text boxes

## Data Agents

- Data schema
- Publish description
- Example queries

## Apps / Org Apps

- Reports within an App

**Item-level metadata:** Title, Description, Endorsements

# How is search content boosted?

## Curation signals

- Prepped for AI
- Verified answers
- Promoted
- Certified

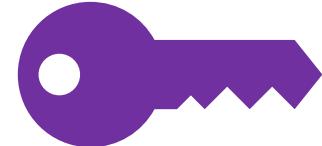
## Usage signals

- Personal views (last month)
- Personal Favorites
- Popular in your org

# How do I make items more discoverable?



Add item  
descriptions



Use unique  
keywords



Create Verified  
Answers for  
FAQs



Prep or  
endorse

# Capability: Summarize

The screenshot shows the Power BI Copilot interface. On the left is a vertical navigation bar with icons for Home, Copilot (selected), Create, Browse, OneLake catalog, Apps, Metrics, Monitor, Learn, Real-Time, Workspaces, and My workspace. The main area features a search bar at the top. Below it is a section titled "Hi Tori" with the subtext "Uncover insights in your data with the help of AI". A large button says "Ask a question about your data" with a "→" icon. Underneath is a "Copilot Preview" section with three cards: "Find reports about [a topic]", "Prep a summary for my team about report" (which is highlighted with a red rectangle), and "What can Copilot help me with?". At the bottom right of this section is a "See more ▾" link.

Summarizes  
reports or  
specific topics  
in reports



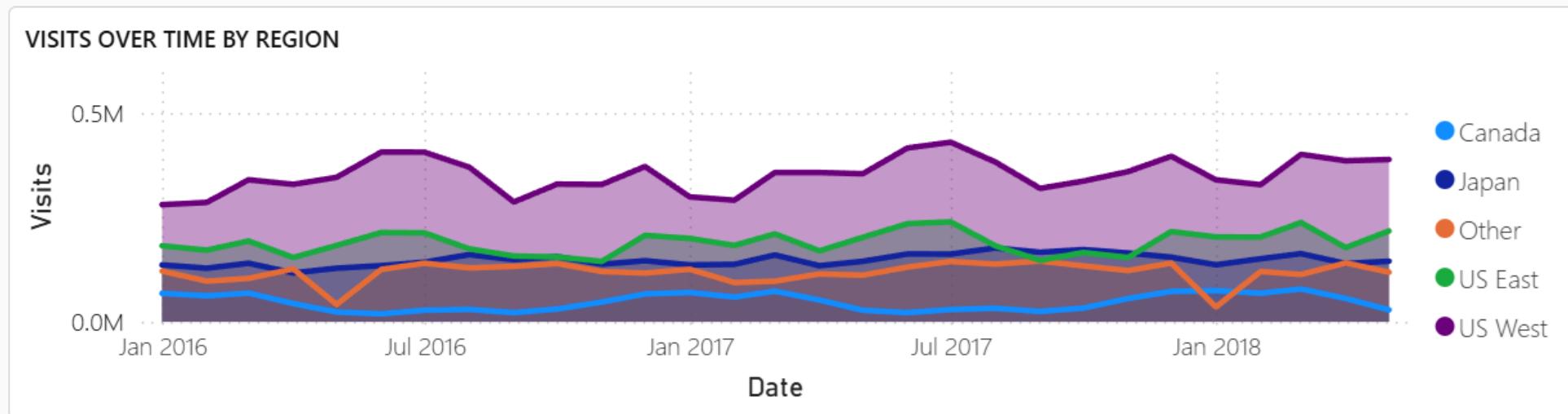
Copilot

AI-generated content may be incorrect

Visits from Japan to Hawaii show a fluctuating pattern from January 2016 to May 2018.

### 1. Monthly Visit Trends:

- The number of visits from Japan in early months of each year appears steady with peaks around March and varying dips, such as in January and May ①.
- Notably, March and August tend to show higher visitor numbers, for instance, 160,976 visits in August 2016, 166,602 in September 2017, and 163,354 in March 2018 ①.



88 Explore answer

Open in report

### 2. Overall Trends:

- Across the observed period, visits from Japan show consistent seasonal highs and lows, suggesting peak travel periods possibly aligned with holiday seasons and other local factors ①.
- By analyzing the time series data, the pattern of visitations indicates potential cyclical patterns relating to annual holidays or vacation periods in Japan ①.

# Capability: Answer Data Questions

The screenshot shows the Power BI Copilot interface. On the left is a navigation sidebar with icons for Home, Copilot, Create, Browse, OneLake catalog, Apps, Metrics, Monitor, Learn, Real-Time, Workspaces, and My workspace. The main area has a search bar at the top. A banner at the top right indicates a trial with 17 days left. Below the banner is a user profile icon. The central part of the screen features the "Hi Tori" logo and the tagline "Uncover insights in your data with the help of AI". There is a text input field labeled "Ask a question about your data" with a placeholder "+ Add items for better insights" and a large "→" button. Below this are several cards representing different AI capabilities:

- Find reports about [a topic]
- Prep a summary for my team about report
- What can Copilot help me with?
- Answer a question about data in report** (This card is highlighted with a red border.)
- Summarize key insights in report
- View semantic models related to [a topic]
- Give a quick overview of report
- Show me [a metric] over time
- Show me apps about [a category]

At the bottom right of the main area is a "See less ^" button.

Can find answers within existing report visuals

Can generate new analysis from semantic model data

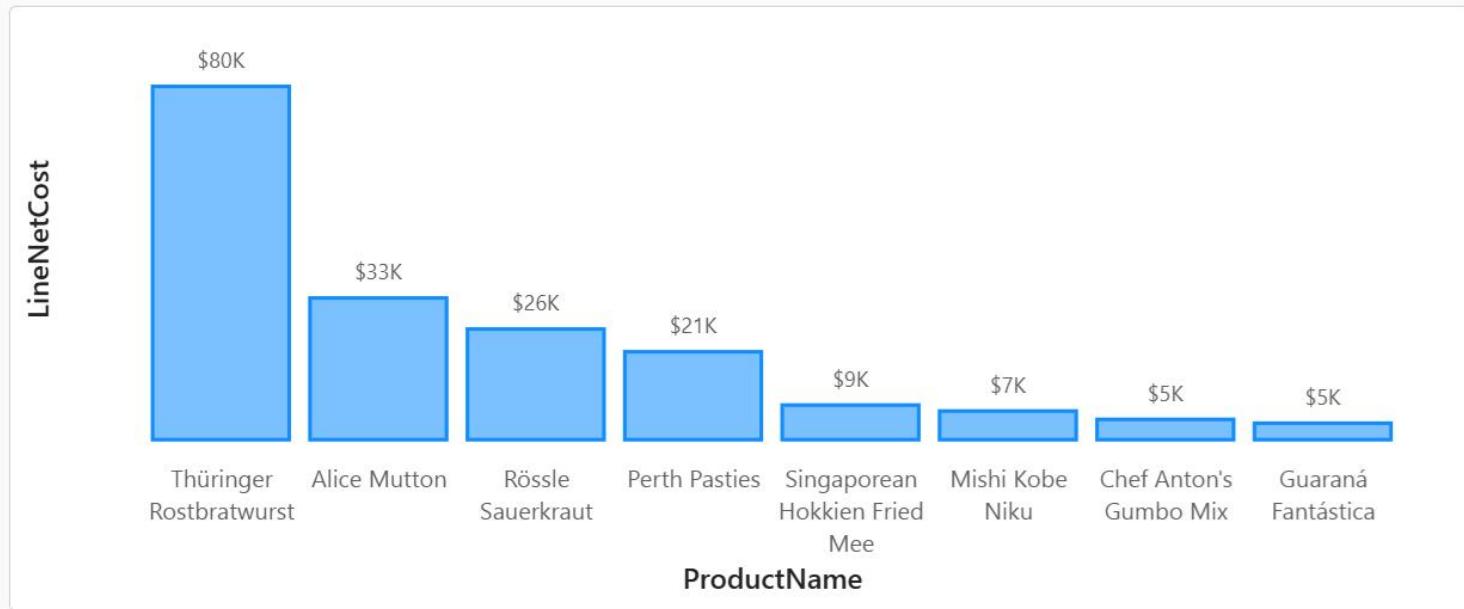
Sales for each product that has been discontinued



Copilot

AI-generated content may be incorrect

Showing product name and total net cost, where discontinued status is true 1



^ How Copilot arrived at this

You asked: "Sales for each product that has been discontinued."

#### Data used

ProductName  
Σ LineNetCost

#### Filters applied

Discontinued is True

1 | NorthwindProducts

Explore the data



# Attach specific data to your question

The screenshot shows the Microsoft Power BI Copilot interface. At the top, there's a navigation bar with the Microsoft logo, 'Power BI Copilot', a search bar, and account information (Trial: 29 days left). On the left, a sidebar includes links for Home, Copilot (selected), Create, Browse, OneLake catalog, Apps, Workspaces, My workspace, and Power BI. The main area features a greeting 'Hi Sid' and the tagline 'Uncover insights in your data with the help of AI'. It displays three main sections: 'Find an item', 'Get a summary', and 'Ask a question', each with several options. A dropdown menu under 'Find an item' lists 'Reports', 'Semantic models', 'Data agents', and 'Apps (coming soon)'. At the bottom, a note says 'Copilot uses AI. Always review content for mistakes. [Read terms](#)'.

Ask questions  
on specific  
artifacts

Use Fabric Data  
Agents without  
leaving  
standalone

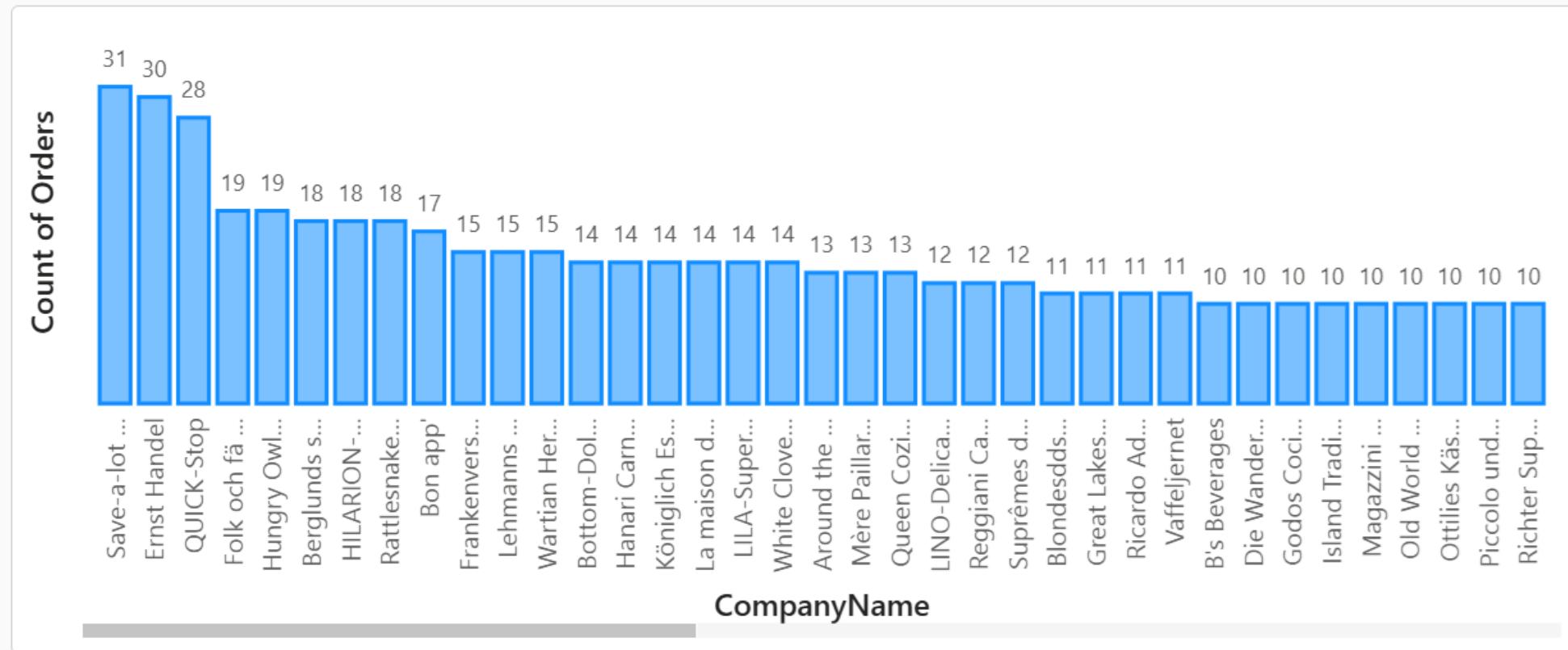
NorthwindProducts how many orders does each of my customers have?



Copilot

AI-generated content may be incorrect

Showing company name and number of orders for customers 1



⌄ How Copilot arrived at this

1 | NorthwindProducts

Explore the data



customer-sales How many transactions were there for each product?



Copilot

AI-generated content may be incorrect

Here are the number of transactions for each product:

- **Credit Card:** 10 transactions
- **Savings Account:** 6 transactions
- **Checking Account:** 2 transactions
- **Car Insurance:** 5 transactions

1 | customer-sales



What is the most common product purchased by customers?



Copilot

AI-generated content may be incorrect

The most common product purchased by customers is the **Credit Card**, with a total of 10 transactions.

1 | customer-sales



# Standalone Copilot admin and governance



# Enable Standalone tenant settings

- 1.) Enable “*Users can use Copilot and other features powered by Azure OpenAI*”
- 2.) Enable “*Users can access a standalone, cross-item Power BI Copilot experience*” (this will be enabled automatically in late September for users who haven’t modified the setting)

## Limitations:

- Only available when home tenant is in a Fabric-supported Geo
- Not yet supported for sovereign clouds due to GPU availability.

## Admin portal

Tenant settings New

Usage metrics

Users

Premium Per User

Audit logs

Domains New

Workloads

Tags New

Capacity settings

Copilot and Azure OpenAI Service

- ▷ Users can sync workspace items with GitHub repositories  
*Enabled for the entire organization*
- ▷ Users can use Copilot and other features powered by Azure OpenAI  
*Enabled for the entire organization*
- ▷ Users can access a standalone, cross-item Power BI Copilot experience (preview) New  
*Enabled for the entire organization*

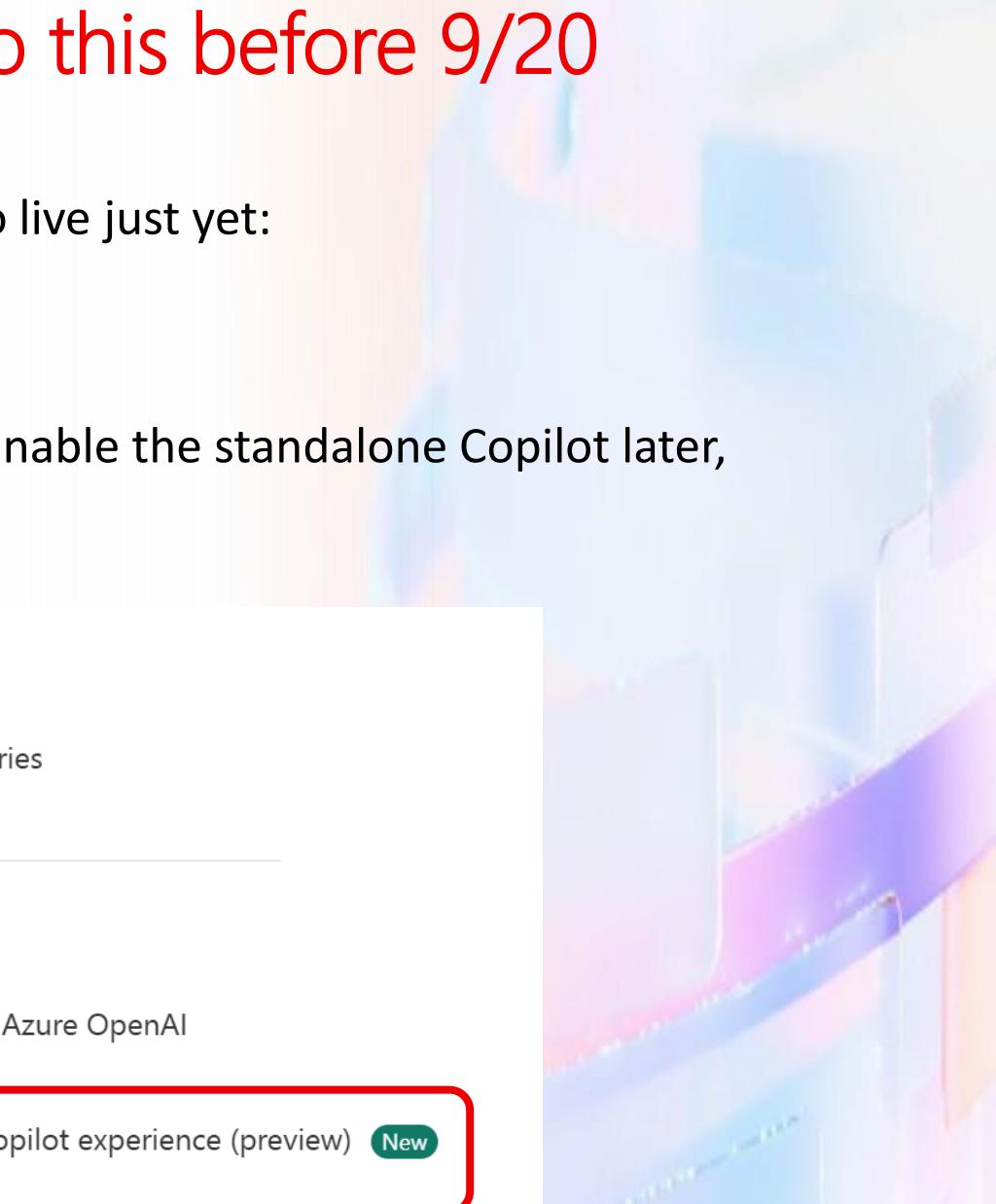
# Want to opt-out of automatic rollout? **Do this before 9/20**

If you're not ready for the standalone Copilot experience to go live just yet:

1. Turn [the setting](#) on in the admin portal.
2. Then immediately turn it off.

Performing this action before 9/20 tells us that you prefer to enable the standalone Copilot later, and we'll **skip the automatic default-on** for your tenant.

## Admin portal



Tenant settings New

Usage metrics

Users

Premium Per User

Audit logs

Domains New

Workloads

Tags New

Capacity settings

▷ Users can sync workspace items with GitHub repositories  
*Enabled for the entire organization*

---

Copilot and Azure OpenAI Service

▷ Users can use Copilot and other features powered by Azure OpenAI  
*Enabled for the entire organization*

▷ Users can access a standalone, cross-item Power BI Copilot experience (preview) New  
*Enabled for the entire organization*

# Select view answer to bypass the warning

Users must select the View Answer button to reveal the full answer

Copilot AI-generated content may be incorrect

This answer might be low quality since the data needs AI prep. Open the report to vet the results and ask the data owner to prep the data for AI. [Learn more](#)

Showing sales territory country and total sales amount 1

A horizontal bar chart titled "Showing sales territory country and total sales amount". The y-axis is labeled "SalesTerritoryCountry" and lists six countries: United States, Australia, United Kingdom, Germany, France, and Canada. The x-axis is labeled "SalesAmount". Each country has a teal-colored horizontal bar extending to the right, with the exact value labeled at the end of the bar. The values are: United States (\$9.4M), Australia (\$9.1M), United Kingdom (\$3.4M), Germany (\$2.9M), France (\$2.6M), and Canada (\$2.0M).

SalesTerritoryCountry	SalesAmount
United States	\$9.4M
Australia	\$9.1M
United Kingdom	\$3.4M
Germany	\$2.9M
France	\$2.6M
Canada	\$2.0M

How Copilot arrived at this

1 | AdventureWorks

Explore the data

# You can restrict search to AI-prepped items

- Only show AI-prepped items in the standalone Copilot in Power BI experience (preview) New

*Disabled for the entire organization*

When this is turned on, the standalone Copilot experience in Power BI won't show users Fabric items unless they're designated as prepped for AI. Users will still be able to manually attach items to ask questions. Copilot item usage is always subject to user permissions. [Learn More](#)



Disabled

⚠️ To use this setting, ensure the following tenant settings are also enabled: "Users can use Copilot and other features powered by Azure OpenAI" and "Users can access a standalone, cross-item Power BI Copilot experience (preview)."

⚠️ This setting applies to the entire organization

Delegate setting to other admins  ⓘ

Select the admins who can view and change this setting, including any security group selections you've made.

Domain admins can enable/disable

Workspace admins can enable/disable

Apply

Cancel

This setting makes it so that Copilot will only return **prepped items** to end users.

Users can always manually attach items to standalone Copilot

This setting is intended to suppress accidental discovery of unprepended data

# You can restrict search to AI-prepped items

## Workspace settings

The screenshot shows the 'Copilot and Azure OpenAI Service' section of the workspace settings. A search bar at the top contains the placeholder 'Search'. On the left, a sidebar lists various settings categories: General, License info, Azure connections, System storage, Git integration, OneLake, Workspace identity, Outbound networking, Encryption (preview), and Monitoring. Under 'Power BI', there's a 'Delegated Settings' section with 'OneLake settings' and 'Copilot and Azure OpenAI Service' (which is currently selected, indicated by a blue border). The main content area is titled 'Copilot and Azure OpenAI Service' and contains the following text:

Only show AI-prepped items in standalone Copilot and the Power BI agent (preview)

When this is turned on, the standalone Copilot experience in Power BI and the Power BI agent in Microsoft 365 won't show users Fabric items unless they're designated as prepped for AI. Users will still be able to manually attach items to ask questions. Copilot item usage is always subject to user permissions. [Learn More](#)

> Enabled for all users

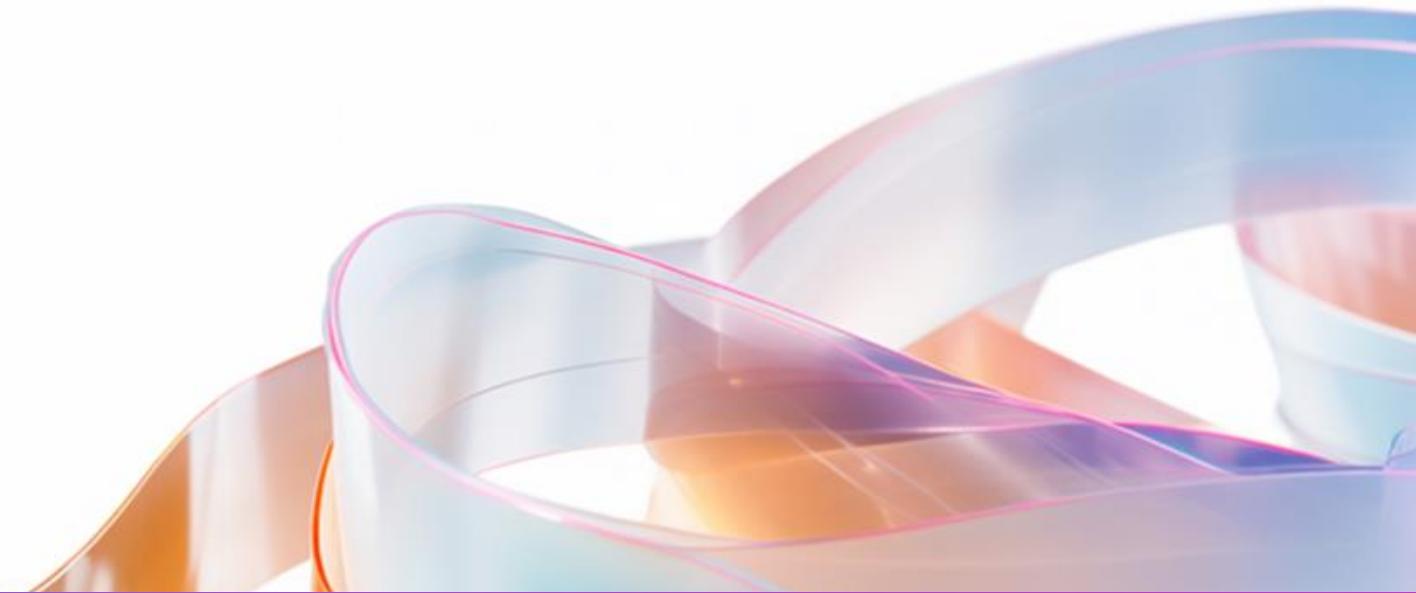
↳ Revert to default

A toggle switch on the right is set to 'On'.

This tenant setting is delegated.

Tenant admins set the default, but each workspace admin can adjust for their own content.

# Standalone lab



# Current lab: Lab 4 – Copilot in Standalone

- **Lab assets located at:** [aka.ms/CWYDWorkshop](https://aka.ms/CWYDWorkshop)
- **Lab name:** Lab 4 – CWYDIAD – Standalone Copilot experience
- **Time until next section:** 15:15
- **Bonus lab:** Lab 5 [bonus] CWYD – Fabric Data agents

Raise your hand if you need help!

# Resources

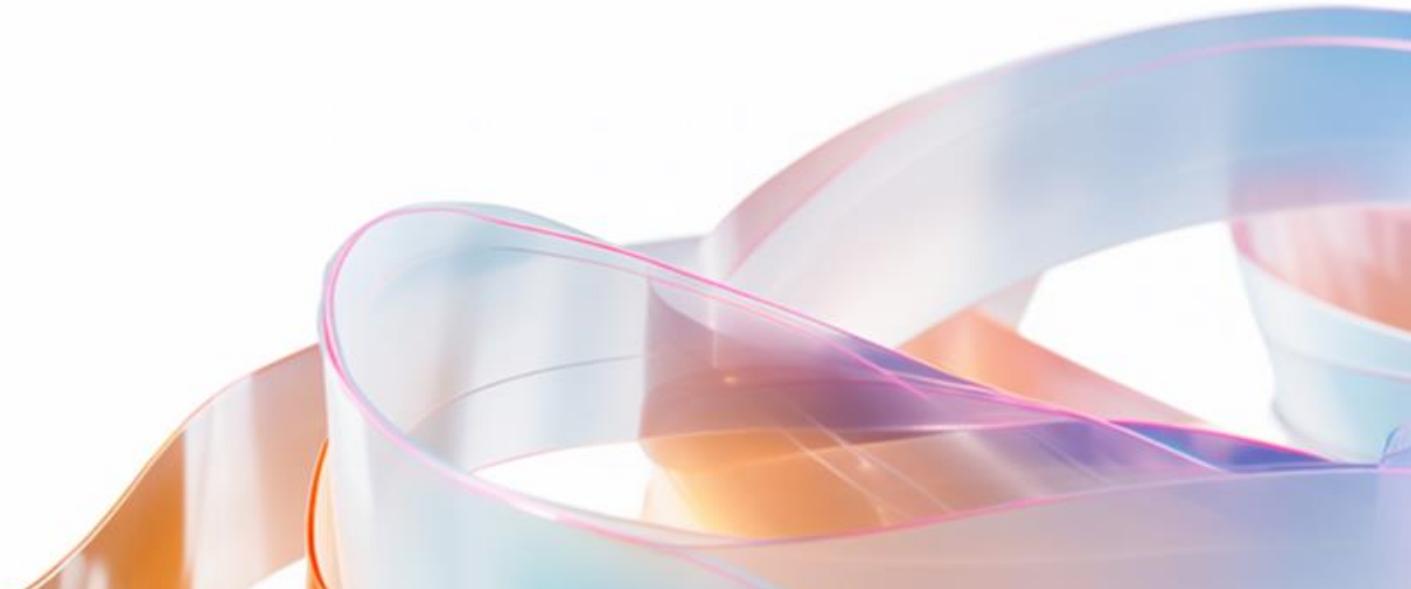
- [Standalone Copilot experience in Power BI \(preview\) - Power BI | Microsoft Learn](#)
- [Find content using Power BI Copilot search - Power BI | Microsoft Learn](#)
- [Enable Fabric Copilot for Power BI - Power BI | Microsoft Learn](#)
- [Prepare your data for AI - Power BI | Microsoft Learn](#)

Break time!

We will start again at 15:45!



# Copilot limitations and considerations



# Limitations

- **Performance Delay on Capacity Changes**
  - When scaling up or purchasing new capacity, **Copilot availability may take up to 24 hours** to become active
- **Filter limitations**
  - The filters Copilot applies are static in the visual it generates. If you want interactive filtering (slicers, filter pane), you still have to add those manually.
- **Limited language support**
  - Only support English today
- **Throttling & Capacity Consumption**
  - If many requests are made within a short time, Copilot may throttle responses, delivering suggestions only for part of a model.
  - In rare cases, errors may trigger **infinite retries**, potentially exhausting your consumption capacity; though Microsoft fixed this issue in December 2024
- **Embedding & Report Type Restrictions**
  - Copilot is **not supported for paginated reports**, and the Copilot Chat Pane is **not available for embedded scenarios**, only the narrative visual is supported
- **Not all of Copilot is generally available**
  - Some Copilot experiences are generally available, and others are in preview. The report agent (the Copilot pane available on the right side of reports) is generally available, while the Power BI agent (the standalone, full-screen experience accessible from the Power BI left navigation) is in preview. Copilot experiences for Data Factory, Data Engineering, Data Science, Data Warehouse, and Real-Time Intelligence are in preview.
- **Sovereign clouds are unsupported**

Cost

Capacity metrics app demo

# Roadmap



# What's new and coming to CWYD Copilot experiences

## Public Preview

- Standalone Power BI Copilot
- Copilot for Power BI Mobile
- Filtered summaries

## Sneak Peak

- Power BI Agent in M365
- CWYD Copilot for PBI Mobile
- CWYD Copilot for PBI Apps
- CWYD Copilot with MCP Server
- Leverage reasoning models
- Prep data for AI on the web

## Roadmap

- Zero prompt improvements
- Saved prompts
- Chat history
- Copy answers
- Improved conversationality
- Improving scoping for search relevance

# Questions



That's a wrap!

