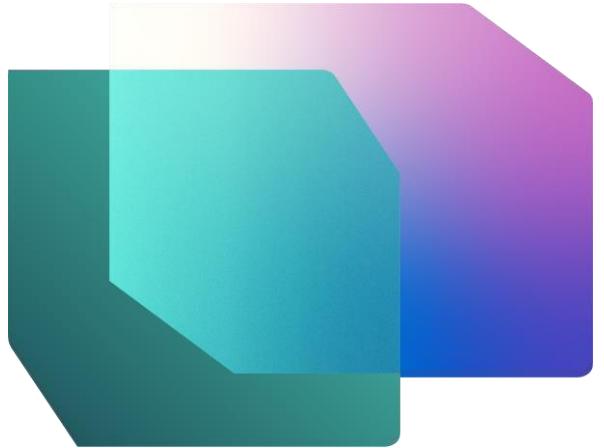


Microsoft Fabric

Chat with your Data in a Day
Lab #3

Version: September 2025



Contents

Document Structure	3
Scenario / Problem Statement	3
Introduction.....	3
Prepare data for Copilot	3
Task 1: Simplify the data schema	4
Task 2: Add AI Instructions	10
Task 3: Create verified answers.....	13
Task 4: Using Simplify the data schema and AI instructions	17
Task 5: Try it yourself.....	20
Conclusion.....	20
References	20

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

You've recently enabled Copilot in Microsoft Fabric to help users interact with data more intuitively. However, early usage has revealed that Copilot sometimes returns inaccurate or confusing answers. These issues stem from overly complex data models, ambiguous terminology, and unclear definitions within the semantic layer.

To improve Copilot's performance, you've learned how to prepare your data model using the Prep data for AI feature in Power BI. This includes simplifying the schema, adding AI instructions, and creating verified answers to guide Copilot toward more accurate and context-aware responses.

Current Challenges

- Reduce ambiguity in Copilot responses caused by unclear measures and terminology.
- Ensure Copilot understands business-specific definitions (e.g., best-selling vs. highest selling).
- Provide verified answers to common questions to improve consistency and reliability.
- Limit Copilot's access to unnecessary or misleading data elements.

Introduction

So far, you've learned how to build and publish semantic models. Now, you'll take the next step by preparing those models for use with Copilot. In this lab, you'll use the Prep data for AI feature to simplify your schema, add AI instructions, and create verified answers—all of which help Copilot deliver more accurate and business-relevant insights.

By the end of this lab, you will have learned:

- How to simplify a data schema to guide Copilot's behavior
- How to add AI instructions to clarify business terminology
- How to create verified answers to improve Copilot's accuracy

Prepare data for Copilot

In this section, you will prepare a data model for use with Copilot. This is necessary because Copilot sometimes gives wrong or confusing answers because the data model contains extra measures, unclear definitions, or ambiguous terminology. Therefore, we have a **Prep data for AI** button on the Home ribbon in Power BI.

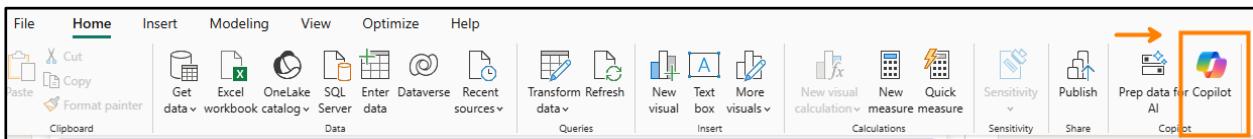
Before you start the lab

Before you start this lab, your instructor will show you a video of how Copilot misinterprets prompts, or answers certain questions incorrectly. This lab will take you through how to update Copilot to get the desired answers you are looking for.

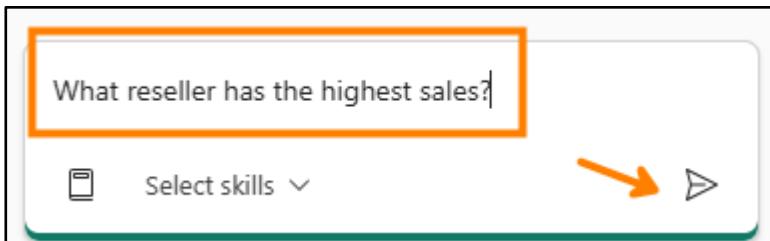
Task 1: Simplify the data schema

1. From your class files, open the PBIX file named **Lab 3 - Cwydiad Prep data for AI**.

2. Click the Copilot button on the **Home** ribbon.



3. Ask Copilot **What reseller has the highest sales?** Press **Enter** or click the **arrow**.



4. You can see the results in the screenshot below. These are not the results we expected. Copilot used the measure [Sales by Reseller], however, we want Copilot to use [Reseller Sales]. *Note that Copilot might give you the answer with the correct measure. Copilot is nondeterministic and there is no way to guarantee an answer.*

Based on the available data, Wingtip Toys (Obion, TN) is the reseller with the highest sales, as indicated by its consistent appearance at the top of the filtered results.

Wingtip Toys (Obion,...
Sales by reseller Tailspin Toys (Absecon, ...
ResellerName

Wingtip Toys (Obion,...
Sales by reseller Tailspin Toys (Aceitunas,...
ResellerName

Wingtip Toys (Obion,...
Sales by reseller Tailspin Toys (Airport Dri...
ResellerName

+ Add to page



⌄ How Copilot arrived at this

Is this response helpful?



5. Ex[and the “How Copilot arrived at this” section. You can see the measure used was [Sales by reseller]. By selecting the measure in the data pane, you can see that the measure filters to Dec 2022.

⌄ How Copilot arrived at this

You asked: "What reseller has the most sales."

Data used

⌚ [Sales by reseller](#)

☰ [ResellerName](#)

Filters applied ⓘ

≡ Top 1 [ResellerName](#) by [Sales by reseller](#)

To improve results, [prep your data for AI](#).

Is this response helpful?

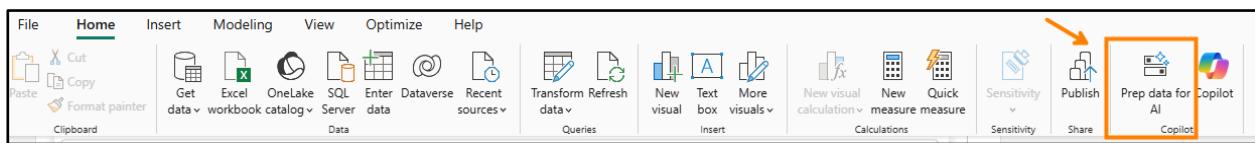


```

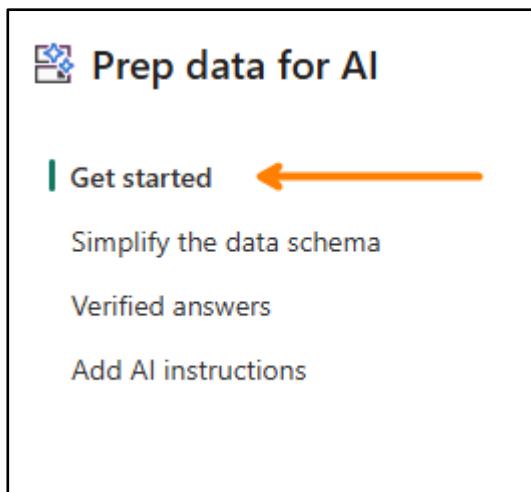
1 Sales by reseller =
2 VAR StartDate = DATE(2022, 12, 1)
3 VAR EndDate = EOMONTH(StartDate, 0)
4 VAR Ranked =
5     TOPN (
6         1,
7         ADDCOLUMNS (
8             ALL ( 'Reseller'[ResellerName] ),
9             "Total Sales",
10            CALCULATE (
11                [Sales],
12                DATESBETWEEN ( 'Date'[Date], StartDate, EndDate )
13            )
14        ),
15        [Total Sales], DESC
16    )
17 RETURN
18 MAXX ( Ranked, 'Reseller'[ResellerName] )

```

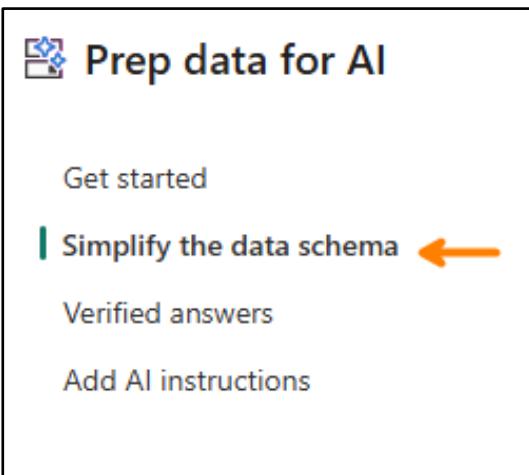
6. We will leverage the Prep data for AI feature in Power BI Desktop to hide the measure [Reseller Sales] from Copilot. In the Home ribbon, select **Prep data for AI**.



7. The new window opens to the **Get started** page.



8. Click on **Simplify the data schema**.



9. Expand the **resellers** table by clicking on the > icon. The [Sales by reseller] measure can create ambiguous results with Copilot, you will remove it from the schema so that Copilot will not include it during analysis! Excluding this measure from Copilot will create better consistency in your results. Click the check box to deselect the measure, then click **Apply**. See screenshot below.

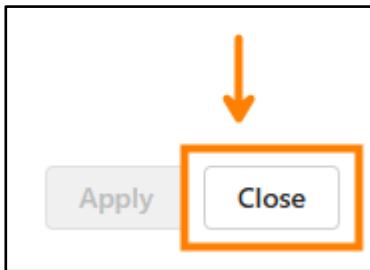
Simplify the data schema (preview)

Improve response accuracy by deselecting fields Copilot doesn't need to analyze. This creates a dedicated AI data schema saved with your semantic model. [Learn more](#)

The screenshot shows the 'Simplify the data schema (preview)' dialog. The 'Reseller' table is expanded, displaying its various fields. The 'Sales by reseller' measure is shown with a checked checkbox, which is highlighted with an orange box. At the bottom right of the dialog, there are 'Apply' and 'Close' buttons, both of which are also highlighted with orange boxes.

Field	
Date	
Geo	
People	
PO	
Product	
ProductDetails	
Reseller	DeliveryAddressLine1
Reseller	DeliveryAddressLine2
Reseller	DeliveryPostalCode
Reseller	FaxNumber
Reseller	PhoneNumber
Reseller	PostalAddressLine1
Reseller	PostalAddressLine2
Reseller	PostalCityID
Reseller	PostalPostalCode
Reseller	Reseller Sales
Reseller	ResellerCompany
Reseller	ResellerID
Reseller	ResellerName
<input type="checkbox"/> Sales by reseller	
WebsiteURL	
Sales	
Supplier	

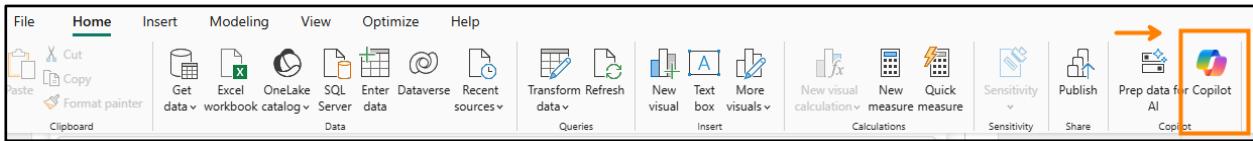
10. Click **Close**.



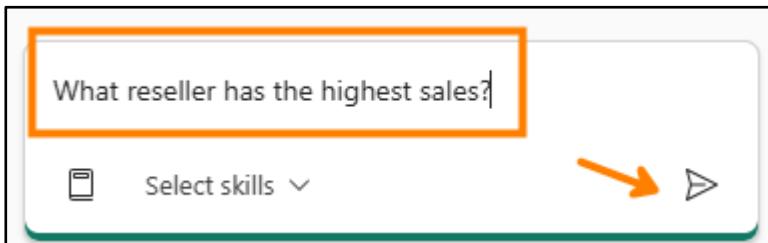
Important

As a best practice, be very descriptive with the names of your tables, columns, and measures. This will help Copilot to create more consistent and accurate results when answering questions. For example, in this model we have a measure named [Reseller Sales] and another measure named [Sales by Reseller]. This is confusing for Copilot and will result in answers that may be inconsistent. For this lab, we removed this measure from the schema, in other scenarios you may wish to rename the measure!

11. Click the Copilot button on the **Home** ribbon.



12. Ask Copilot **What reseller has the highest sales?** Press **Enter** or click the **arrow**.



13. After getting a response from Copilot, click on **How Copilot arrived at this** section.

Based on the available data, Tailspin Toys (Minidoka, ID) is the reseller with the most sales, indicating its leading position among all resellers in the dataset.

Tailspin Toys (Minido...	Tailspin Toys (Absecon, ...
Reseller Sales	ResellerName
Tailspin Toys (Minido...	Tailspin Toys (Aceitunas,...
Reseller Sales	ResellerName
Tailspin Toys (Minido...	Tailspin Toys (Airport Dri...
Reseller Sales	ResellerName

+ Add to page



^ How Copilot arrived at this

14. You can now see that the measure used to find this answer was the [Reseller sales]!

You asked: "which reseller has the most sales."

Data used

- [Reseller Sales](#)
- [ResellerName](#)

Filters applied

- Top 1 [ResellerName](#) by [Reseller Sales](#)

To improve results, [prep your data for AI](#).

Is this response helpful?



15. As a best practice, it's a good idea to hide tables, columns and measures that may confuse Copilot.

Important

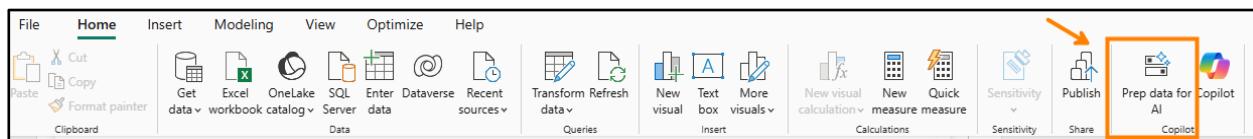
It's common in Power BI to create helper measures or one-off measures that are used for very specific purposes within a very specific filter context. If you know that you have many measures that you will want to hide from Copilot, then it might be worth creating a table specifically for storing measures that you want to hide. This will make the process of updating the schema much simpler. At this time, hiding a measure folder is not supported.

Task 2: Add AI Instructions

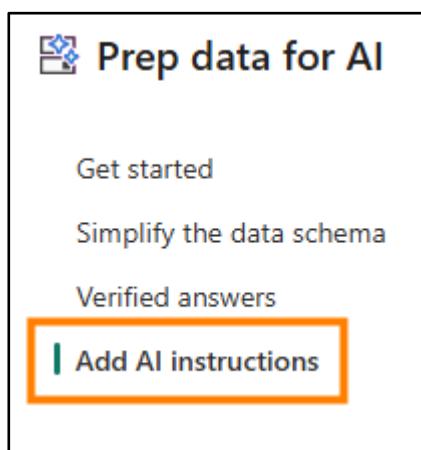
Adding AI Instructions are a very important piece of prepping your data for AI. By adding well defined AI instructions you help Copilot understand your semantic model more deeply by embedding business context, terminology, and analytical priorities directly into the model. This makes Copilot smarter, faster and more aligned with your intent when generating insights, answering questions, or building visuals.

In this lab, you will use AI Instructions to help define what is returned when Copilot is asked about best-selling items.

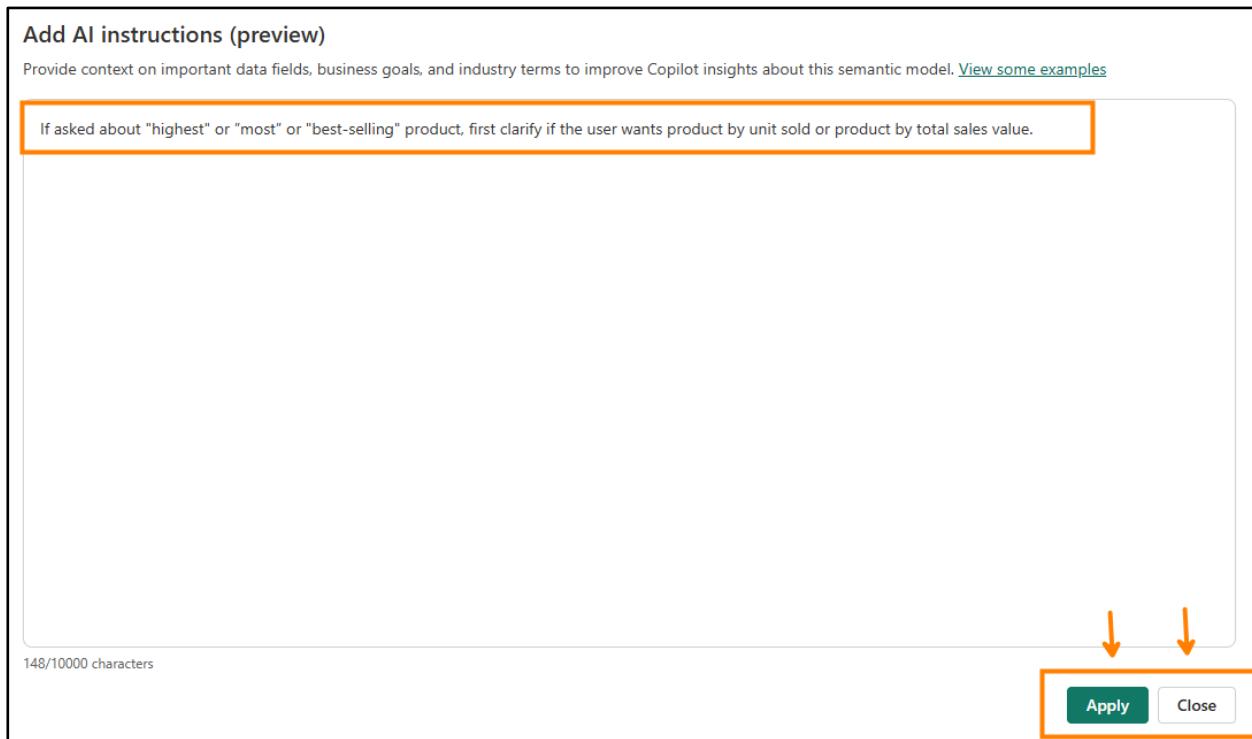
1. For our company, we have a distinct definition between **best-selling** items and **highest selling** items. A best-selling item means an item that sells the most units, whereas a highest selling item means the product that we've sold the most in total dollar amount. Click the **Prep data for AI** button again.



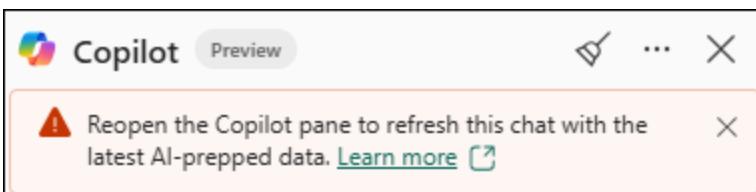
1. Navigate to **Add AI Instructions**.



2. Add an instruction for Copilot to clarify with the user what definition they intend each time they ask for **highest, most or best-selling**. Type **If asked about "highest" or "most" or "best-selling" product, first clarify if the user wants product by unit sold or product by total sales value.** Then click **Apply**, then **Close**.



3. Open the Copilot pane. If it was already open, close Copilot and Reopen it. This will ensure changes you made been applied!



4. Ask Copilot **What's our best-selling product?**

What's our best-selling product?

There are two possible interpretations for "best-selling product":

- By units sold: The best-selling product is "Black and orange fragile despatch tape 48mmx75m" with 130,824 units sold and total sales of \$484,048.80 [1](#) [2](#) [3](#).
- By total sales value: The best-selling product is "Air cushion machine (Blue)" with total sales of \$6,494,580.00 from 3,420 units sold [4](#) [5](#) [6](#).

Please specify if you are interested in best-selling by units sold or by total sales value.

Is this response helpful?



5. Because we provided Copilot with instructions to clarify with the end user what they mean by best-selling, we will see two options here.
6. Type **units sold** into the prompt and hit enter. Copilot will now provide you with the answer.

units sold

Our best-selling product by units sold is "Black and orange fragile despatch tape 48mmx75m," with 130,824 units sold and total sales of \$484,048.80. If you need more details or want to see a breakdown by category or time period, let me know.

Is this response helpful?



7. Let's imagine we are positive that every user in the organization knows the distinction between best-selling & highest selling. In that case, we can simply provide definitions to Copilot using AI Instructions.
8. Reopen the Prep data for AI dialog, navigate to Add AI instructions, and replace the current instructions with the following:
 - Best-selling = most units sold
 - Highest selling = total sales value

Prep data for AI

Get started

Simplify the data schema

Verified answers

Add AI instructions

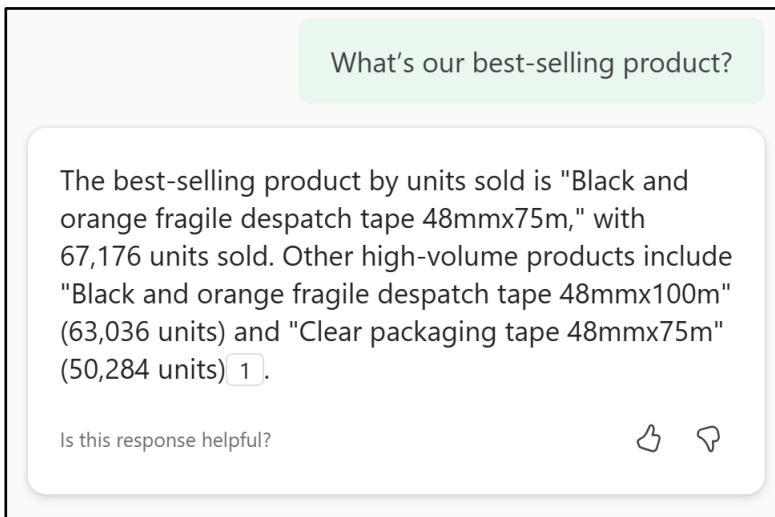
Add AI instructions (preview)

Provide context on important data fields, business goals.

Best-selling = most units sold
Highest selling = total sales value

9. Click apply & then close.

10. Close & reopen Copilot. Type **What's our best-selling product?** In the prompt and hit enter.



The screenshot shows the Microsoft Copilot interface. A green input bar at the top contains the text "What's our best-selling product?". Below it, a white card displays the response: "The best-selling product by units sold is "Black and orange fragile despatch tape 48mmx75m," with 67,176 units sold. Other high-volume products include "Black and orange fragile despatch tape 48mmx100m" (63,036 units) and "Clear packaging tape 48mmx75m" (50,284 units) 1." At the bottom of the card, there is a question "Is this response helpful?" followed by a thumbs-up icon and a thumbs-down icon.

Copilot now arrives at the answer we expect it to – and can distinguish between **best-selling** and **highest selling**. As we mentioned at the beginning of this section. The more well-defined AI instructions you provide, the better Copilot will be!

Task 3: Create verified answers

Let's take our data preparation to the next level by adding verified answers. Verified answers allow the model author to select a visual and choose phrases, that when a user asks, will display that visual as a verified answer. Verified answers also help Copilot to learn context about your model and give more accurate answers even if the prompt doesn't return an exact verified answer.

Important

Verified answers will match the phrase that you set to anything identified as semantically similar. For this reason, you do not need to set every possible variation of what phrase a user might ask. Instead set clear distinct trigger phrases that anything similar might trigger for the user.

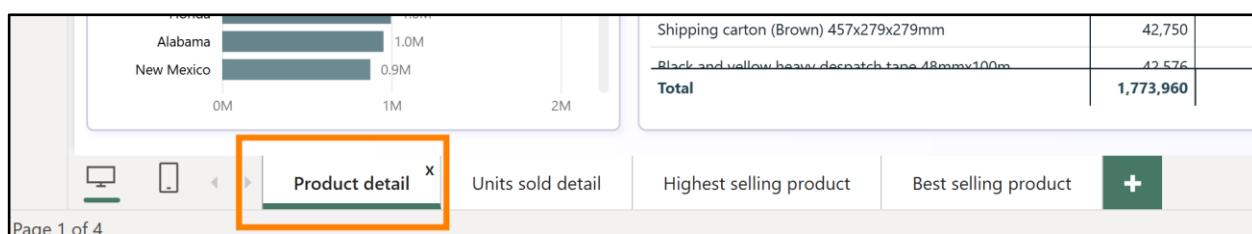
1. For your first example, you will create a verified answer for **Top state for sales**.
2. Currently, if you ask Copilot, **What state has the most sales?**, it doesn't always interpret the question the way you intend. That's because the word "sales" is referenced in several ways within the model and the report.
3. In this example, you will ensure that Copilot always returns the expected response.
4. This time we will not be starting in the prep data for AI dialog. If you open the verified answers tab in the Prep data for AI dialog you'll see that there is nothing available.



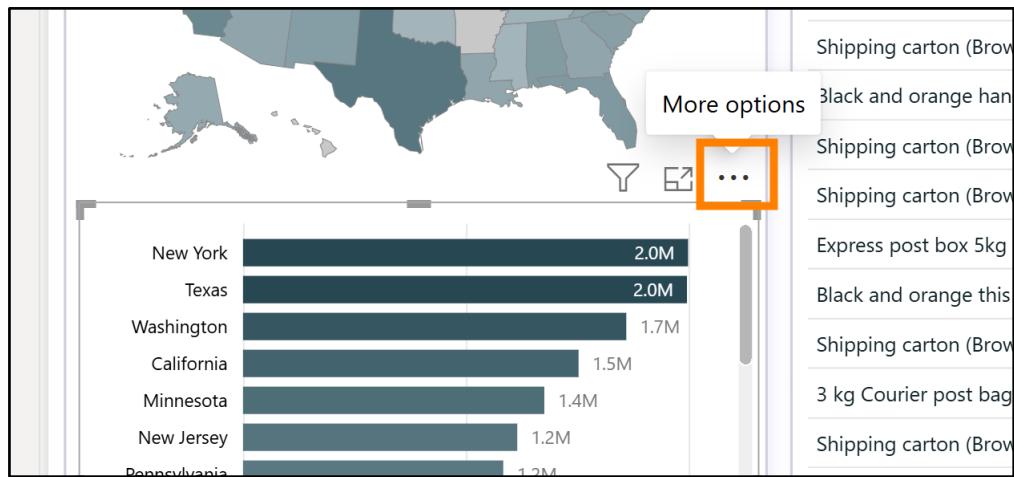
The screenshot shows the 'Prep data for AI' interface. On the left, there are navigation links: 'Get started', 'Simplify the data schema', 'Verified answers' (which is highlighted with an orange box and an arrow pointing to it), and 'Add AI instructions'. On the right, under 'Verified answers (preview)', there is a section titled 'How to set up a verified answer (preview)' with three steps:

1. In a Power BI report using this model, right-click a visual and select "Set up verified answer".
2. Add common phrases or questions users might ask about the data.
3. Copilot will show the saved verified answer when users ask related questions in chat.

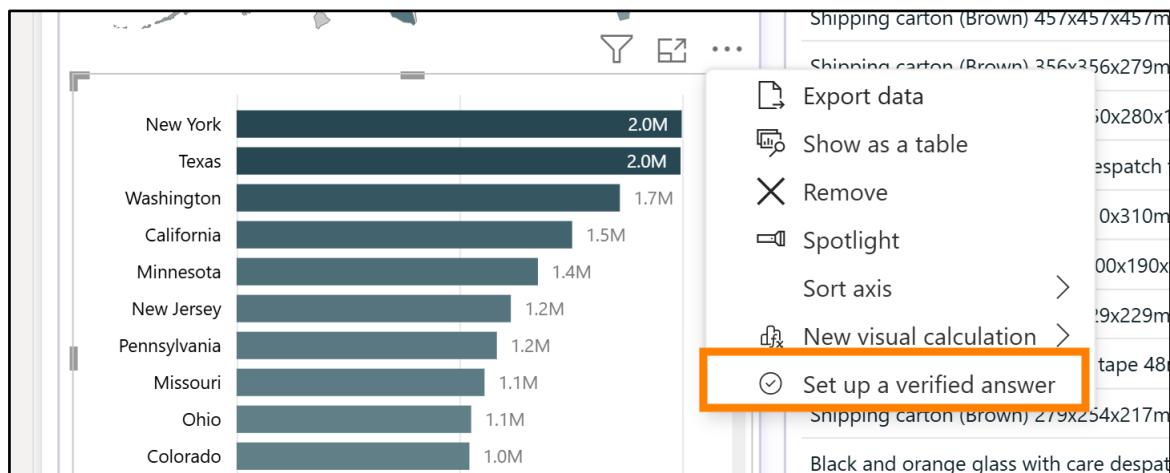
5. Instead, you will start with the visuals on your report.
6. Close the Prep data for AI window and navigate to the Product detail page



7. Click into the bar chart for sales by state and click the ellipsis (...) found in the top right corner.



8. Choose **Set up a verified answer** from the drop down.



9. You can set a phrase by either selecting a Copilot suggestion, or by typing in your own custom phrase. Type in **State with the highest sales** and click **Add**. See screenshot below.

Prep data for AI

Get started
Simplify the data schema
Verified answers
Add AI instructions

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.

State with the highest sales Add

Copilot suggestions

- Which state or province has the highest supplier sales?
- How do supplier sales compare across different states or provinces?
- What are the top performing states or provinces by supplier sales?

Refresh

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

Visual i

The visual below will appear in Copilot's responses to phrases you add. Any changes to the report won't impact this visual.

Apply Close

5. Click apply and then close.
6. Close and reopen the Copilot pane.
7. Ask **What state has the most sales?**
8. Get a correct verified answer returned for the question.

What state has the most sales?

✓ Your question matched a verified answer: "State with the highest sales"

+ Add to page Share

✗ How Copilot arrived at this

Is this response helpful? Upvote Downvote

9. Next, type in the following prompt **What state is selling the most of the highest selling product?**

What state has the most sales?

Your question matched a verified answer: "State with the highest sales"

State	Sales
New York	2.0M
Texas	2.0M
Washington	1.7M
California	1.5M
Minnesota	1.4M

+ Add to page

How Copilot arrived at this

Is this response helpful?

What state is selling the most of the highest selling product?

Texas has the highest sales for the highest selling product, with \$461,457 in sales. California and New York follow with \$415,881 and \$389,295 respectively 1.

Is this response helpful?

10. This returned the expected and correct result and was not affected by the verified answer we provided earlier.

Prep data for AI

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

Verified answers (preview)

Filter by keyword

Phrases connected to verified answers

State with the highest sales 1 phrase

Task 4: Using Simplify the data schema and AI instructions

1. Let's use a combination of features to solve a complex business scenario. Specifically, to return what customer had the most sales.

Within this organization, customers are defined specifically as resellers who purchase and then distribute our products. The end consumers purchasing from those resellers are not classified as customers.

Currently, this distinction is unclear to Copilot. As a result, queries about customer sales return information related to individual buyers rather than to reseller customers.

2. Open **Prep data for AI**
3. Select **Simplify the data schema**
4. **Deselect** the entire **customer** table

The screenshot shows the 'Simplify the data schema (preview)' section of the 'Prep data for AI' interface. On the left, there are navigation links: 'Get started', 'Simplify the data schema' (which is selected and highlighted in green), 'Verified answers', and 'Add AI instructions'. A search bar at the top right says 'Filter by keyword'. The main area displays a list of fields under the 'Customer' table, which is currently selected (indicated by an orange border around its checkbox). Most fields have an unchecked checkbox next to them, except for 'Customer' itself, which has a checked checkbox. Other fields listed include Address, Age, BrandAffinity, City, Country, CustomerID, Distinct Products Sold, FullName, Generation, InterestAffinity1, InterestAffinity2, No of Customers, ResellerID, Sales by Customer Count, State, Total Sales by Unit Price, Total Sales Without Lowest Supplier, and ZipCode. At the bottom of the list, there are two sections: 'Date' and 'Geo', each preceded by a checked checkbox.

5. Click **apply**.
6. Navigate to **Add AI instructions**.
7. Add an AI instruction that defines customers as the resellers.

The screenshot shows the 'Prep data for AI' pane. On the left, there are three options: 'Get started', 'Simplify the data schema', and 'Verified answers'. Below these is a button labeled 'Add AI instructions' which is highlighted with an orange border. On the right, the title 'Add AI instructions (preview)' is displayed above a text area. The text area contains the following context:
Provide context on important data fields, business rules, or key concepts.
Best-selling = most units sold
Highest selling = total sales value
Customers are the resellers

8. Click **apply** and **close**.
9. If already open, close and reopen the Copilot pane.
10. Ask **What customer sold the most products in 2021?**

The screenshot shows the Copilot pane with the following content:
What customer sold the most products in 2021?
Based on the available data, Wingtip Toys (Key Biscayne, FL) was the top customer by total units sold in 2021.
Wingtip Toys (Key Biscayne, FL)
7046
Total Units Sold
+ Add to page
^ How Copilot arrived at this
You asked: "What customer sold the most products in 2021?"
Data used
 [Total Units Sold](#)
 [ResellerName](#)
Filters applied
 Top 1 [ResellerName](#) by [Total Units Sold](#)
 [Year](#) is 1/1/2021 - 12/31/2021

11. Let's take a look at another example, open Copilot and type **Who sold the most products in Texas in 2024.**

The screenshot shows a Copilot AI interface. At the top, a green bar displays the query: "Who sold the most products in Texas in 2024". Below this, the AI response states: "Based on the available data, Tailspin Toys (South La Paloma, TX) sold the most products in Texas in 2024." A callout box highlights "Tailspin Toys (South La Paloma, TX)" with the number "2626" and the label "Total Units Sold". At the bottom left, there are buttons for "Add to page" and "Edit". Below these buttons is a link "How Copilot arrived at this". At the very bottom, there is a feedback section asking "Is this response helpful?" with up and downvote icons.

In this example, you saw the various prep data for AI features work together to arrive at the desired result.

Task 5: Try it yourself

If lab time permits, continue to explore the **Prep Data for AI** features that you learned about in this lab.

12. Start by asking a question of Copilot that you would like to know. If the results are not what you wanted or expected. Think about how you can ensure the result you want by using simply the data schema, verified answers, or AI Instructions!

Conclusion

Congratulations! You've completed the prep data for AI section of the lab!

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.

Help

Search

Power BI

Service health and known issues

Check service status

View our current known issues

Other Resources

Submit an idea

Ask the community

Get Microsoft help

Accessibility shortcuts

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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