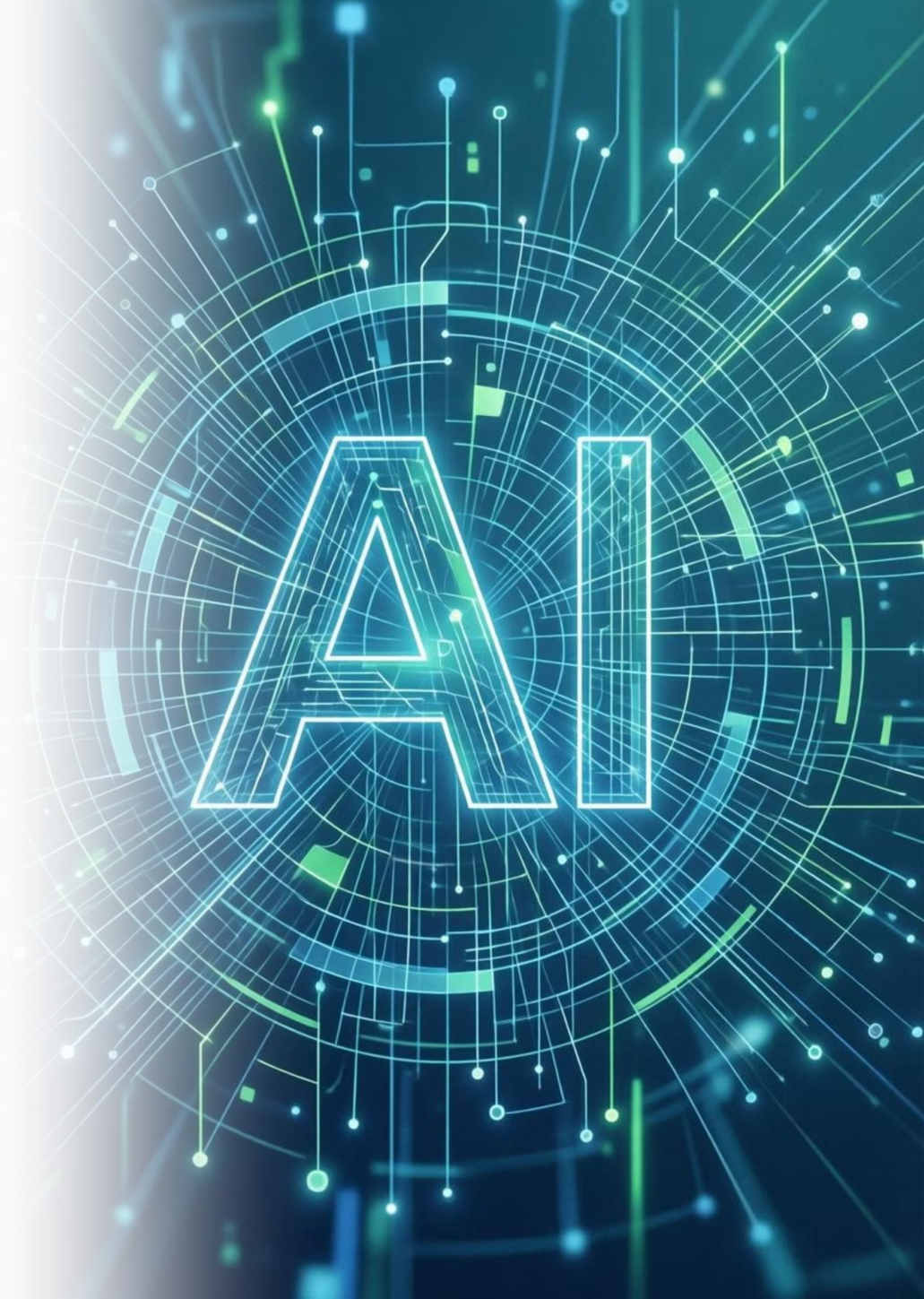
Copilot in Power BI

SECTION TITLE

Copilot in Power BI

AI That Understands Your Business

> *"The model IS the prompt."*



The Board Wants What?

1

Friday 4 PM

Board meeting Monday. Need 12 new visuals ready by Sunday.

2

48 Hours

YoY comparisons, regional breakdowns, trend analysis.

3

After Weeks of Work

Pipelines, security, Direct Lake all built.

4

The Solution

Let's try Copilot.

Demo: Copilot Done Right

Act	What Happens
1	Copilot fails (unprepared model)
2	Prep Data for AI introduction
3	Naming conventions & descriptions
4	AI Instructions & Verified Answers
5	Copilot succeeds (prepared model)

~45 minutes, live demo

Why Copilot Disappoints (Sometimes)

The Problem

```
Prompt: "Show me margin analysis by supplier"

Copilot: "I'm not sure which field represents margin..."
```

What Copilot Reads

- Table names
- Column names
- Measure names
- Descriptions

If metadata is generic or missing, Copilot has nothing to work with.

The Model IS the Prompt

Poor Model	Copilot Result
ProdID, CustNo, SupCost	Confusion
No descriptions	Generic guesses
200 columns, 50 relevant	Wrong field selection
No business context	Misunderstood terminology

> **Copilot is only as good as your data preparation.**

AI-Powered Assistance in Power BI

Copilot is a generative AI assistant built into Power BI that helps you:

Capability	What It Does
Create visuals	Generate charts from natural language prompts
Write DAX	Generate measures and calculations
Explain code	Understand existing DAX formulas
Summarize reports	Create narrative summaries
Answer questions	Chat with your data

Powered by Azure OpenAI. Reads your semantic model metadata.

Making Your Model AI-Ready

1

The Problem

- Copilot only sees metadata
- Doesn't know business terms
- Can't read your mind

2

The Solution

- Give Copilot context
- Simplify what it sees
- Pre-approve answers

> *"Think of it as onboarding Copilot to your organization."*

AI Schema, Instructions, and Verified Answers

Feature	What It Is	Analogy
AI Data Schema	Select which fields Copilot can see	"Here's the relevant data"
AI Instructions	Natural language business context	"Here's how we talk about things"
Verified Answers	Pre-approved visual responses	"Here's the trusted answer"

All three work together to make Copilot smarter about YOUR data.

Business Context in Natural Language

AI Instructions are free-form text to help Copilot understand:

Business Terminology

"Margin means Gross Margin"

Analysis Preferences

"Always use quarterly analysis"

Data Relationships

"Top customers = top 10 by revenue"

Company Context

"Busy season is October-February"

Stored on semantic model. Applied to everyone. *Limit: 10,000 characters*

Human-Approved Responses

01

Create Visual

Build the "answer"

02

Define Triggers

"Show me sales trends"

03

Copilot Returns

YOUR visual for similar questions

Why Use Them

- Consistency across users
- Trusted, reviewed answers
- No AI guessing for important questions

DEMO

Declutter Your Model

The Problem

- Copilot sees ALL 200 columns
- Internal IDs, deprecated fields
- Technical columns
- More confusion = worse results

The Solution

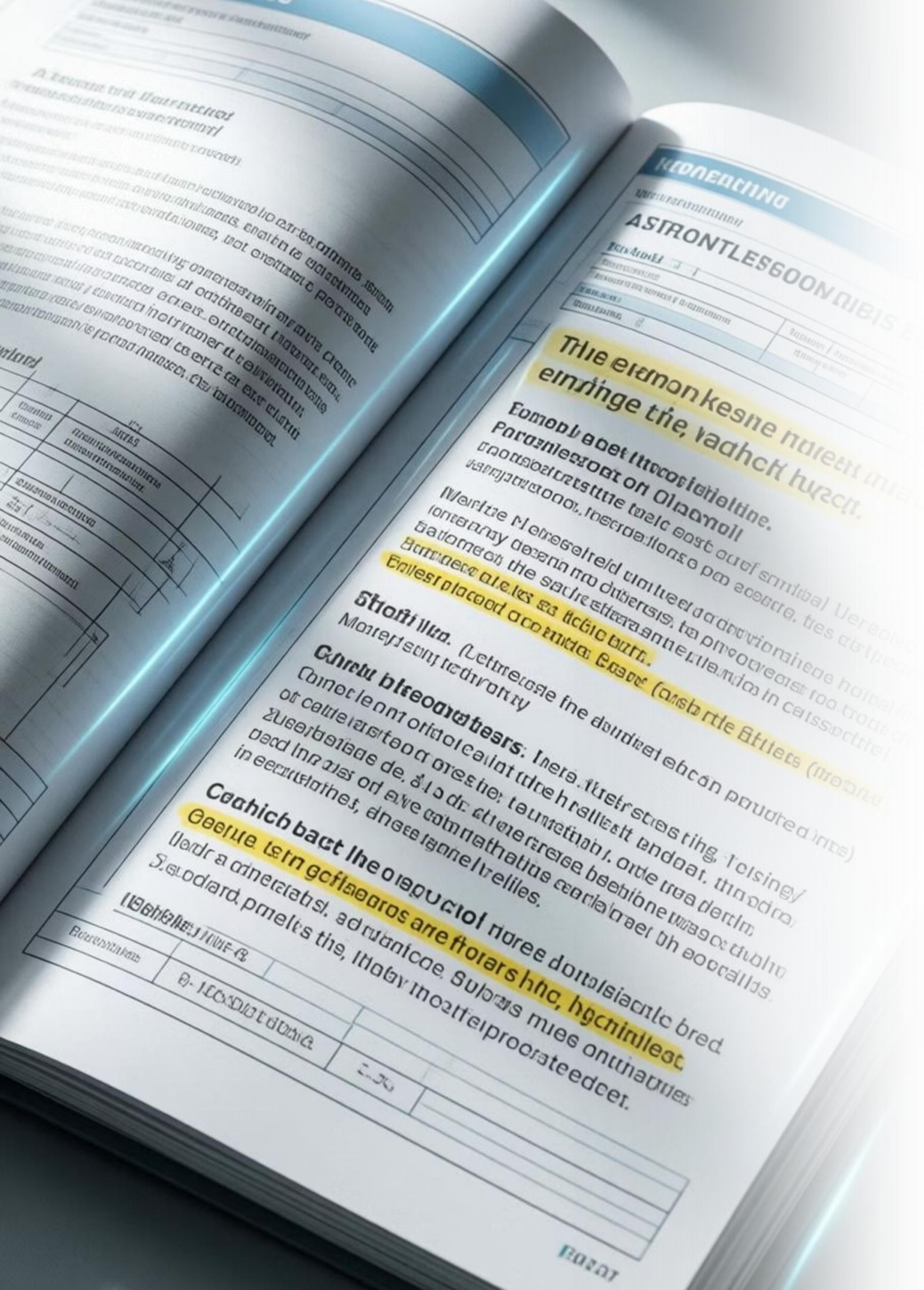
- Select only relevant fields
- Hide confusing columns from AI
- Narrow the focus

Copilot only reasons over what you select.

Names Matter More Than You Think

❌ Bad Name	✅ Good Name
ProdID	Product ID
CustNo	Customer Number
SupCost	Supplier Cost
AvgRating	Average Customer Rating
YoY%	Year Over Year Growth Percentage

> **If Copilot can't understand the name, it can't use the field correctly.**



First 200 Characters Used by AI

Bad Description

(empty)

Good Description

```
"Year-over-year difference in Orders.
Use with Date[Year] column to show by years
other than the latest year. Partial years
compare to same period of prior year."
```

Pro tip: Use "Create with Copilot" button to auto-generate descriptions!

Be Explicit About Table Types

Table Type	Naming Pattern	Example
Fact tables	`Fact` prefix	`FactSales`, `FactTransactions`
Dimension tables	`Dim` prefix	`DimProduct`, `DimCustomer`
Date tables	Clear name	`Date`, `Calendar`
Bridge tables	Descriptive	`ProductCategoryBridge`

Copilot understands these patterns.

Example Business Context

```
Business Context:
- We are a regional retail company in Pacific Northwest
- "Margin" = Gross Margin = (Revenue - Supplier Cost) / Revenue
- Busy season is October through February

Analysis Rules:
- Always analyze sales on a quarterly basis
- For regional comparisons, use Store[Region]
- Primary sales measure is [Total Sales]

Terminology:
- "Top customers" = top 10 by revenue
- "YoY" = year-over-year comparison
```

Limit: 10,000 characters

Write Effective Instructions

Tip	Example
Be explicit	"Margin always means Gross Margin"
Define terminology	"Top sellers = top 3 partners by revenue"
Specify rules	"Always use quarterly analysis"
Use examples	"For product sales, use Total_Sales_Product"
Group related items	Organize by theme

> **Think of it as prompt engineering at the model level.**

Setting Up Curated Responses

What They Are

- Human-approved visual responses
- Triggered by predefined phrases
- Consistent answers to common questions

Example Triggers

- "Show me sales trends"
- "Monthly sales over time"
- "Revenue by month"

All return the SAME trusted visual.

Creating a Verified Answer

01

Select a visual in your report

02

Click "Set up a verified answer" (... menu)

03

Add trigger phrases (up to 15)

04

Configure available filters (up to 3)

05

Apply

250

Verified Answers

Per model limit

15

Trigger Phrases

Per answer

3

Filters

Available per answer

Same Copilot. Different Results.

Unprepared Model	Prepared Model
"I'm not sure which field..."	Correct visual generated
Wrong measures selected	Right measures used
Generic responses	Business-aware responses
"What is margin?"	"Margin = (Revenue - Cost)/Revenue"
Frustrated user	Productive user

The difference: 1 hour of Prep Data for AI setup.

What Copilot Does Well

Task	Strength	Notes
Generate visuals	⭐⭐⭐⭐⭐	With good schema
Write DAX measures	⭐⭐⭐⭐	Always verify
Explain existing DAX	⭐⭐⭐⭐⭐	Great for docs
Generate descriptions	⭐⭐⭐⭐⭐	Use the button!
Understand business	Depends	On your AI Instructions

Know the Boundaries

Limitation	Reality
Custom visuals	Not supported
Styling/formatting	Manual only
Real-time streaming models	Not supported
ML/predictive analytics	Outside DAX capabilities
Perfect accuracy	Always verify
Business-specific logic	Needs AI Instructions

> **It's a copilot, not an autopilot.**

What You Need for Copilot

Requirement	Details
Capacity	F2+ Fabric or P1+ Premium
Admin setting	Copilot enabled in tenant
Q&A enabled	Required for report creation
Region	Check Fabric region availability
Model type	Import, DirectQuery, Direct Lake, Composite

Not available on trial SKUs.

Getting Started with Copilot

1. **Audit your model**
   Naming conventions, descriptions
2. **Enable Prep Data for AI**
   Simplify schema
3. **Write AI Instructions**
   Business context
4. **Create 5-10 verified answers**
   Common questions
5. **Train your team**
   When to use, when to verify

> **Remember:** The model IS the prompt.

The Complete Fabric Journey

Section	What We Built
Git Integration	Version control, deployment pipelines
OneLake	Centralized data, shortcuts, Delta
Dataflows & Pipelines	Automated refresh, orchestration
Direct Lake	Real-time reports, no refresh wait
Security	OneLake Security, RLS everywhere
Copilot	**AI that understands your business**

From Power BI Pro to Microsoft Fabric.

AI Accelerates. Humans Validate.

Without Preparation

- Copilot guesses
- Generic results
- Frustration

With Preparation

- Copilot understands
- Business-aware results
- Acceleration

> *"I didn't work the weekend. Copilot helped me ship on time. But I still verified every visual."*

Questions?

Resources

- MS Learn: "Prepare your data for AI"
- MS Learn: "Overview of Copilot for Power BI"
- MS Learn: "Optimize your semantic model for Copilot"

> **The model IS the prompt.**

Thank you for spending your day with us!

End of Section 07