Copilot for Power BI

Consume a report by using Copilot

You can use Copilot to ask questions about and summarize reports. This experience is available whenever you use a report, including in Power BI Desktop, a published report in a workspace, app, or OrgApp item, or in the Power BI mobile app.

Ask data questions

Consumers can ask questions about reports and get answers by using in the Copilot pane. Copilot can find specific data points for the user and return them as an output, referencing the source visual that they retrieved this from.

Consumers might ask data questions of a semantic model in the following scenarios:

- They can't find the information or analysis that they need in the report.

- They want to see data presented in a different way, and personalize visuals isn't enabled.

- They want to ask "a data question" using natural language, rather than using tools or code.

 Note

Copilot will first search the report for the answer to the user's question. If the answer isn't on any report page, then Copilot asks a data question of the semantic model.

Furthermore, the experience differs for reports viewed in a workspace and reports viewed in an app. In an app, Copilot might search pages of all reports that a user can access, depending on the **app audience** they belong to.

The following image shows an example of a report consumer asking a data question about a report by using Copilot in the Power BI service.

The image shows the following prompt: *What was the profit margin for Australia in 2022?* Copilot then returns an output with the answer, referencing the current report page and which visual on that page contains the answer.

In the Power BI mobile app, you can also ask data questions for any report by using the Copilot chat pane in the app.

Summarize a report page

You can summarize report pages by using Copilot in smart narrative visuals on the page, in the Copilot pane, or in report subscriptions.

Consumers might use report page summaries in the following scenarios:

- Reports are complex or difficult to understand and consumers want an explanation.

- Consumers have challenges with visual or data literacy and want help.

- Consumers want a natural language summary to help them think through insights.

To improve the usefulness of summaries, the best thing that you can do is to ensure that prompts are descriptive and accurate.

 Note

As always, it's important to identify any AI-generated content and to encourage users to critique it before they use it to support any decisions or actions that they make.

You can also control the length of the prompt, by requesting that it limits the output to a specific number of characters, words, or sentences. However, you can't control the formatting of the output text. You can only modify the formatting for the summary text in the smart narrative visual of reports.

Smart narrative visual

The smart narrative visual can create dynamic summaries of report pages. A report author must first set up the smart narrative visual. Then, the summary will update depending on the data displayed on the page.

The smart narrative can also respond to custom prompts, which is similar to summaries generated in the Copilot pane in response to natural language prompts, described in the next section.

The following image shows an example of a smart narrative summary of visuals on a report page, where footnotes reference specific page visuals.
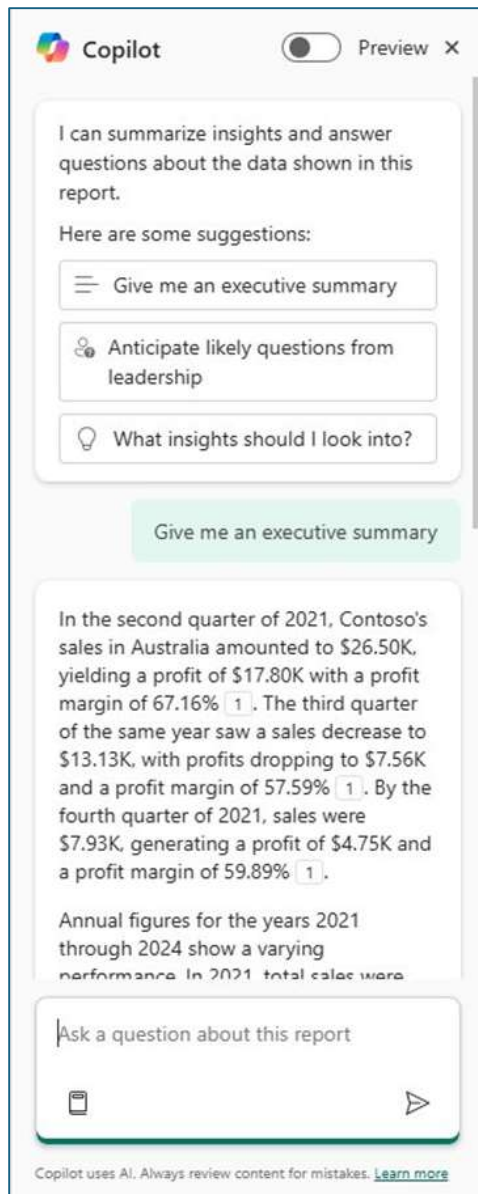
The smart narrative visual on the right part of the page describes the contents of the report that are already shown with visuals.

Copilot pane

You can also request summaries of report pages in the Copilot chat pane. These summaries describe the visuals on the page, and reference visuals where necessary. Summaries in the Copilot pane are useful when users are new to reports and need help, or when they need to find something on a report page.

The following image shows an example of visuals on a report page summarized by Copilot, using the Copilot chat pane.

The image shows the following prompt: *Give me an executive summary (asked by clicking the option)*. Copilot then provides a summary, including key figures and references to specific visuals that contain these figures.