



Microsoft Copilot in Power BI

Cheat Sheet

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Introduction

Microsoft Copilot is an AI assistant built into Power BI that lets you chat with your data, build reports, write DAX measures, and generate summaries in plain English. If you're learning Power BI, Copilot is the AI layer that sits on top of everything you're building.

It serves three user types: **business users** exploring and questioning data, **report authors** building and iterating on reports, and **data model owners** writing the logic Copilot depends on.

> Getting Started

1. Check your capacity — Requires Microsoft Fabric (F2+) or Power BI Premium (P1+). Pro and PPU licenses do not unlock Copilot. Trial SKUs are not supported.

2. Confirm Copilot is enabled — On by default but can be disabled in the Fabric admin portal. If the Copilot button isn't visible, ask your admin to check Tenant settings.

3. Verify workspace assignment — Your workspace must be assigned to a Copilot-enabled capacity — enabling the tenant setting alone is not enough.

4. Check your region — Y Tenants outside the US or France must enable "Data sent to Azure OpenAI can be processed outside your tenant's geographic region" in the Fabric admin portal.

5. Open the Copilot pane — Y Power BI service → open a report → **Edit** → **Copilot** in the ribbon. Desktop users: update to the latest version if the Copilot button doesn't appear.

6. For the standalone experience — Y Power BI service → **left navigation bar** → Copilot icon. Searches all reports and semantic models you have access to. *(Preview as of April 2026)*

*New to Copilot? Start with "Summarize the key insights on this page" in the Report Copilot Pane. Before prompting, see **Preparing Your Data for Copilot** below.*

Where You Can Use Copilot

Copilot is available in four places across Power BI, each suited to a different context.

Report Copilot Pane

Chat panel on the right side of any open report. Ask questions, get summaries, create and edit visuals. The primary entry point for most users.

Standalone Copilot

A full-screen chat experience built into the Power BI service (not a separate app), accessible from the left navigation bar. Unlike the Report Copilot Pane, it searches across all reports, semantic models, and Fabric data agents you have access to — not just the open report.

Copilot in Apps

Copilot in Apps — Full-screen chat scoped to a published Power BI app. Finds the right report or dataset automatically. Supports verified answers set by app authors.

Copilot in Power BI Mobile

Copilot in Power BI Mobile — Ask questions via text or voice on iOS and Android for on-the-go insights.

> Getting Started

Key Terms

- **Semantic Model** — Tables, relationships, and DAX measures that Copilot reads to generate answers. Model quality determines answer quality.
- **Copilot Pane** — The right-side chat panel inside a report, opened from the ribbon in edit mode.
- **DAX** — Power BI's formula language for measures and calculations. Copilot can generate, explain, and refine DAX from plain English.
- **Verified Answers** — Pre-written responses by app or model authors returned instead of a generated response.
- **Approved for Copilot** — Semantic model setting confirming the model is AI-ready. Removes friction in standalone answers.
- **Grounded Reference** — A report or model attached to a Copilot session via + or / as the primary answer source.
- **AI Data Schema** — A defined subset of model fields Copilot prioritizes for data questions. Reduces ambiguity.

> Preparing Your Data for Copilot

Answer quality is almost entirely determined by model preparation. A poorly prepared model produces generic or misleading outputs regardless of prompt quality.

- **Rename tables and columns** — replace system names like `Co1_007` with plain names like `Order Date`
- **Write measure descriptions** — Copilot reads these when generating answers; use the one-click description generator then review for accuracy
- **Define an AI data schema** — in Prep data for AI → Simplify data schema, select fields for Copilot to prioritize; more precise than hiding fields alone
- **Add synonyms** — if your org says "clients" not "customers," add those synonyms so Copilot interprets them correctly
- **Hide irrelevant fields** — surrogate keys, system columns, and staging fields; hidden fields are excluded from the AI data schema
- **Enable Approved for Copilot** — removes friction treatment in standalone responses and boosts the model in Copilot search
- **Add custom instructions** — example: *"When the user asks about 'margin', use the Gross Margin % measure"*

> Core Actions & Prompts

Writing Better Prompts

Adjust field names, time periods, and filters to match your data.

1. Be specific — reference fields, time periods, and filters directly.

Bad: `Show me sales data`

Good: `Show me total sales by region for Q4 2024, excluding returns`

2. State the goal — tell Copilot what question the output should help answer.

Bad: `Create a chart`

Good: `Create a line chart showing monthly revenue by category so I can spot which categories are growing`

3. Scope the visual upfront — saves an editing round.

Bad: `Show me revenue trends`

Good: `Create a line chart showing monthly revenue by product category for 2024`

4. Specify the audience — the output changes meaningfully based on who it's for.

Bad: `Summarize this report`

Good: `Summarize this report for an executive who needs the three most important takeaways`

5. Iterate, don't restart — Copilot retains session context, use it.

Bad: `Create a line chart showing monthly revenue by product category for 2024 broken down by region`

Good: `Now break that down by region (after the previous response)`

6. Re-ask with more detail if it misses — don't just say that's wrong.

Bad: `That's not what I meant`

Good: `Show the same data as a percentage of total, not absolute values, filtered to active customers only`

> For Business Users

Ask Questions

`What are the top 5 products by revenue this quarter?`

`Which region had the largest year-over-year decline in sales?`

`Compare revenue by product category for Q3 and Q4`

Get summaries *(Report Copilot Pane)*

`Summarize the key insights on this page`

`Give me the three most important takeaways from this report`

`Follow up: What should I investigate next based on this data?`

Ask filtered questions

`What were total sales in 2024 for the North region only?`

`Show me headcount by department for Q2`

Find Content

`Find me a report about customer retention`

`Which reports contain data about supply chain performance?`

Attach a data source — type / or click + to ground Copilot to a specific report or model before prompting.

Verify answers — expand **"How Copilot arrived at this"** to see which fields and filters were used. Use **Explore** to adjust if the wrong source was referenced.

> For Report Authors

Generate a Page *(Report Authors — Edit Mode)*

`Create a page showing monthly revenue trends by product category`

`Build an executive summary with total sales, gross margin, and customer count KPIs`

Edit visuals *(Report Copilot Pane — Edit Mode)*

`Add a bar chart comparing Q3 and Q4 revenue by division`

`Replace the table with a matrix broken down by region and product`

`Change the bar chart to show percentage of total instead of absolute values`

Works with the undo/redo stack — revert freely if needed.

Control Copilot's scope — use the **Skill Picker** to restrict Copilot to specific actions, such as answering questions only without modifying report layout.

Add a narrative visual *(Edit Mode)*

`Add a written summary of this page as a narrative visual`

Summarize the model *(Report Copilot Pane)*

`Summarize the tables and measures available in this semantic model`

> Limitations & Watch-Outs

- **Always review outputs** — Copilot can produce inaccurate summaries, incorrect DAX, or misleading visuals. Treat every output as a first draft.
- **Model quality determines answer quality** — Generic or wrong answers are almost always a model problem, not a prompt problem. Fix column names, add measure descriptions, define an AI data schema, and enable Approved for Copilot before adjusting prompts.
- **Admin setup has three requirements** — all mandatory: Tenant-level setting enabled + workspace assigned to **F2+/P1+** capacity + cross-geo data processing enabled (for tenants outside the US or France). Some regions have Copilot unavailable entirely.