

Chat with your Data in a Day

Duration: 8 hrs

Overview

This course introduces Chat with Your Data (CWYD) using Microsoft Copilot in Power BI and Microsoft Fabric, helping learners turn enterprise data into actionable insights through natural language. Participants explore Copilot experiences, including standalone Copilot and Fabric Data Agents, while learning how to prepare semantic models for AI by fixing common data issues and applying modeling best practices. The course covers AI data preparation techniques such as schema simplification, verified answers, and AI instructions to improve accuracy and trust. By the end, learners understand how to enable, govern, and scale Copilot across their organization for smarter, faster data-driven decisions.

Course Objectives

In this course, you will learn:

- Understand Chat with Your Data using Microsoft Copilot across Power BI and Microsoft Fabric
- Learn to use standalone Copilot to search, summarize, and answer data questions
- Prepare semantic models for AI with key modeling best practices
- Improve Copilot accuracy using AI prep features and instructions
- Explore Fabric Data Agents and basic tenant governance for secure rollout.

Course Agenda

Lesson 1- What is Chat with your Data

- What is Copilot
- Copilot in Office
- Microsoft 365 Copilot
- Copilot in Fabric
- Copilot in Power BI
- What is CWYD?
- Where can I chat with my data?
- Power BI Copilot (Report pane, standalone, mobile)
- How do I access CWYD?
- Access requirements for Copilot

Lesson 2 – Understanding the Standalone Copilot experience

- Standalone Copilot overview
- Search capability overview
- Finding relevant data items
- Suggesting items based on user questions
- What Copilot can search
- How search ranking is boosted
- Improving discoverability

Lesson 3 – Common Problems of Un-Prepped Data

- Data that is unprepped for AI
- Has your data been prepped for AI?
- Common pitfalls
- Assessing Copilot Readiness

Lesson 4 – Fixing Common Problems

- Modelling Best Practices
 - o Star schema
 - o Synonyms
 - o Linguistic schema & relationships
 - o Descriptions
 - o Implicit vs explicit measures
 - o Data categories
 - o Default summarization
 - o Sort by
 - o Using Copilot for measure descriptions

Lesson 5 – Prepare Data for AI

- Prep data for AI
- Prep data for AI in the service
- Prepped for AI setting
- Warnings on unprepped data
- View Answer friction treatment

Lesson 6 – Standalone Copilot Experience

- Standalone Copilot capabilities
- Summaries

- Answer data questions
- Attaching specific data
- Friction treatment

Lesson 7 – Fabric Data Agents

- Why Data Agents
- Data Agents vs Standalone Copilot
- Data sources
- Asking questions
- Adding AI instructions
- Example questions
- Publishing & sharing
- Consumption across platforms

Lesson 8 – Tenant Settings

- Fabric tenant settings
- Users can use Copilot
- Access to standalone Copilot
- Azure OpenAI data handling
- Designating Copilot capacities
- Only show AI-prepped items
- Creating and sharing Data Agents
- XMLA & Excel enablement