

KOENIG SOLUTIONS · COURSE OUTLINE

Copilot in Power BI (Microsoft)

Learn to use Copilot in Power BI to prepare data, build reports, and generate narrative summaries and DAX queries.

3 Days

24 HOURS

13

MODULES

60

TOPICS

COURSE OVERVIEW

This course covers using Copilot in Power BI for data preparation and report creation, along with the requirements, licensing and tenant settings needed to enable and access it in both the Power BI service and Power BI Desktop. It then examines building and updating semantic models for Copilot use, creating and consuming report pages, and generating narrative summaries in the service and in Desktop. It also covers setting up report subscriptions with Copilot summaries, using the Copilot pane to answer questions about report content, and writing effective prompts for report pages and narrative visuals. Finally, it looks at advanced features such as writing DAX queries, generating measure descriptions, and enhancing Q&A with Copilot.

WHO THIS COURSE IS FOR

Report Authors

Business Users

BI Developers

Data Analysts

LEARNING OBJECTIVES

- Explain how Copilot supports data preparation in Power BI
- Identify requirements and licensing for enabling Copilot
- Configure Copilot access in the Power BI service and Desktop
- Apply Copilot to create and consume report pages
- Create narrative summaries and narrative visuals with Copilot
- Write effective Copilot prompts for reports and visuals
- Set up report subscriptions with Copilot summaries
- Use advanced Copilot features such as DAX queries and Q&A

13 Modules, 60 Topics

01

Get Started with Copilot in Power BI

TOPICS

Introduction · Use Copilot in Power BI for data preparation · Create reports with Copilot in Power BI · Get your data ready for AI usage in Power BI

02

Copilot for Power BI

TOPICS

- Access Copilot in the Power BI service
- Access Copilot in Power BI Desktop
- Copilot requirements
- **Feature overview:** Copilot capabilities
- Copilot for business users
- Copilot for report authors
- Considerations and limitations

03

Enable Copilot for Power BI

TOPICS

- Enable Fabric Copilot for Power BI in your tenant
- Enable Copilot setting
- Enable sharing data across geographic boundaries
- Use Copilot for Power BI in the service
- Use Copilot in Power BI Desktop
- Licensing requirements

04

Updating Data Model for Copilot in Power BI

TOPICS

- Considerations for semantic models for Copilot use

05

Use Copilot with Power BI Reports

TOPICS

Create a report page with help from Copilot · Consume a report by using Copilot

06

Create Reports in the Power BI Service with Copilot

TOPICS

- Use Copilot in the Power BI service for the first time
- Get started using Copilot
- Enhanced Report Creation (Public Preview)
- Create a narrative summary
- Undo a page
- Save the report

07

Create Reports in Power BI Desktop with Copilot

TOPICS

- Use Copilot the first time in Power BI Desktop
- Get started using Copilot
- Create a narrative summary
- Undo a page
- Save the report

08

Create Report Subscriptions with Copilot Summaries in the Power BI Service (Preview)

TOPICS

Requirements · How to set up Copilot in email subscriptions · Limitations and considerations

09

Summarize a Report in the Copilot Pane

TOPICS

- Get started with standard prompts
- Reference footnotes
- Custom prompts
- Benefits
- Answer questions about your report content in the Copilot pane
- Examples of questions you can ask
- Limitations and considerations

10

Write Copilot Prompts for Creating Report Pages in Power BI

TOPICS

Sample prompts for report pages · Sales performance by product · Customer segmentation and loyalty · Promotion effectiveness and ROI · Inventory and supply chain management

11

Create a Narrative Visual with Copilot for Power BI

TOPICS

Get started · Save the report · Considerations and limitations

12

Write Copilot Prompts to Create Narrative Visuals in Power BI

TOPICS

Sample prompts for narrative visuals · Start from scratch · The original suggested prompt · First modification of the custom prompt · **Second modification:** Custom prompt · **Third modification:** Custom prompt

13

Advanced Copilot Features

TOPICS

- Write DAX queries with Copilot
- Use Copilot to create measure descriptions (preview)
- Enhance Q&A with Copilot for Power BI
- Ask Copilot for data from your model (preview)
- Use Copilot preview features in Power BI

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

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✉ info@koenig-solutions.com