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Copilot-Driven Business Intelligence with Power BI

Accelerating Data Analytics, AI-Assisted Reporting, and Decision Intelligence - 2 days

FA-0143 · 2 days

Agentic & Generative AI · Data & Analytics

Introduction

Modern organizations are no longer struggling to collect data; they are struggling to interpret it quickly enough to make confident decisions. Microsoft Copilot and Power BI are reshaping the analytics landscape by combining generative AI with enterprise-grade business intelligence. This combination allows analysts, managers, and technical professionals to move beyond static dashboards into conversational analytics, AI-assisted report development, automated DAX generation, and intelligent insight discovery.

This intensive two-day program is designed to help participants understand how Microsoft Copilot enhances the Power BI ecosystem across report creation, semantic modeling, natural language querying, visualization development, and enterprise analytics workflows. The course incorporates current Microsoft Fabric and Power BI capabilities, including AI-assisted report authoring, Copilot-powered DAX generation, conversational reporting, semantic model optimization, mobile AI experiences, and modern governance considerations.

The training is delivered from a practical industry perspective by an instructor with over 30 years of real-world enterprise technology experience, focusing on operational business scenarios, modern analytics workflows, and production-oriented implementation practices rather than purely academic demonstrations.

Learning outcomes

By the end of this course, participants will be able to:

- Understand the architecture and capabilities of Microsoft Copilot within Power BI
- Navigate Power BI Desktop, Power BI Service, and Microsoft Fabric AI integrations

- Use Copilot to generate reports, dashboards, narratives, and visualizations
- Create and optimize DAX calculations using AI-assisted development
- Build conversational analytics workflows using natural language prompts
- Understand semantic models and AI-ready data preparation strategies
- Configure Copilot-enabled environments within Power BI and Fabric
- Apply governance, security, and compliance considerations for enterprise AI analytics
- Implement AI-assisted reporting and dashboard design best practices
- Use Copilot to accelerate data storytelling and executive reporting
- Understand modern Power BI AI capabilities including mobile Copilot experiences and conversational reporting

Prerequisites

- Basic understanding of business intelligence concepts
- Familiarity with Microsoft Excel or reporting tools
- Basic understanding of relational data concepts
- General Windows operating system knowledge
- Prior exposure to Power BI is beneficial but not mandatory
- Fundamental understanding of business reporting processes is recommended
- Working Power BI installed

Training outline

1. Introduction to AI-Powered Business Intelligence

2. Evolution of Business Intelligence Platforms

1. Traditional reporting versus AI-assisted analytics
2. Modern enterprise analytics challenges
3. Data democratization initiatives
4. Conversational analytics trends
5. Generative AI in enterprise reporting

Introduction to Microsoft Copilot Ecosystem

1. Microsoft Copilot architecture overview
2. Microsoft 365 Copilot integration landscape
3. Copilot within Microsoft Fabric

4. AI-assisted productivity workflows
5. Enterprise AI adoption patterns

Power BI Modern Analytics Platform

1. Power BI ecosystem overview
2. Power BI Desktop architecture
3. Power BI Service capabilities
4. Microsoft Fabric integration
5. Semantic model fundamentals
6. Data visualization strategy

Current Industry Trends and AI Enhancements

1. Conversational BI capabilities
2. Natural language analytics
3. AI-generated visualizations
4. AI-assisted storytelling
5. Mobile Copilot analytics experiences
6. Modern Power BI AI enhancements and Copilot capabilities

3. Environment Preparation and Platform Configuration

Power BI Desktop Installation and Setup

1. Installing Power BI Desktop
2. Workspace configuration
3. User profile setup
4. Connectivity validation
5. Interface customization

Microsoft Fabric and Power BI Service Preparation

1. Power BI Service overview
2. Workspace management
3. Fabric capacity considerations
4. Licensing requirements
5. Copilot enablement prerequisites
6. Tenant configuration requirements

Copilot Configuration and Enablement

1. Enabling Copilot features
2. Administrative prerequisites
3. Security group configuration

4. Azure OpenAI integration concepts
5. Copilot access validation
6. Governance controls

Data Connectivity Fundamentals

1. Import mode concepts
2. DirectQuery overview
3. Direct Lake concepts
4. Connecting to enterprise data sources
5. Cloud and on-premises connectivity
6. Data refresh workflows

4. Power BI Fundamentals for AI-Assisted Analytics

Understanding the Power BI Workflow

1. Data ingestion lifecycle
2. Data transformation process
3. Data modeling fundamentals
4. Visualization lifecycle
5. Publishing and sharing workflows

Data Modeling Fundamentals

1. Tables and relationships
2. Star schema concepts
3. Fact and dimension tables
4. Relationship cardinality
5. Hierarchies and metadata
6. Semantic model optimization

Data Transformation with Power Query

1. Power Query fundamentals
2. Query editor interface
3. Data cleansing workflows
4. Data transformation operations
5. Data shaping techniques
6. Query optimization basics

Visualization and Dashboard Fundamentals

1. Visual selection principles
2. Dashboard design practices

3. Interactive filtering
4. Drill-through operations
5. Conditional formatting
6. KPI presentation strategies

5. Introduction to Copilot in Power BI

Copilot Architecture and Capabilities

1. AI-powered reporting workflows
2. Natural language processing concepts
3. Conversational analytics architecture
4. Copilot interaction models
5. Semantic understanding principles

Copilot User Experience

1. Copilot pane navigation
2. Standalone Copilot access
3. Conversational interaction workflows
4. Prompt engineering fundamentals
5. AI-assisted exploration workflows

Natural Language Querying

1. Asking analytical questions
2. Generating visualizations from prompts
3. Conversational filtering
4. Trend and anomaly exploration
5. Context-aware questioning
6. AI-generated summaries

AI-Assisted Visualization Generation

1. Automatic chart generation
2. Narrative visualizations
3. AI-generated report pages
4. Visualization recommendations
5. Layout refinement workflows
6. Executive reporting acceleration

AI-Driven Report Summarization

1. Automated insight generation
2. Narrative explanations

3. Business trend summaries
4. Executive-level reporting narratives
5. Data storytelling workflows

6. Copilot-Assisted DAX and Advanced Analytics

Introduction to DAX

1. DAX fundamentals
2. Measures versus calculated columns
3. Aggregation functions
4. Filter context concepts
5. Evaluation context principles

AI-Assisted DAX Development

1. Generating DAX using Copilot
2. Explaining existing DAX expressions
3. DAX optimization assistance
4. Troubleshooting DAX calculations
5. AI-assisted debugging workflows

Time Intelligence and Business Calculations

1. Year-over-year calculations
2. Rolling averages
3. Growth percentage calculations
4. Trend analysis metrics
5. Forecasting support concepts

Advanced Analytical Workflows

1. Predictive analytics concepts
2. AI-driven anomaly detection
3. Trend identification
4. Root-cause analysis workflows
5. Business performance monitoring

Semantic Model Optimization for AI

1. AI-ready data modeling
2. Metadata enhancement
3. Naming conventions
4. Business-friendly schema design
5. Improving Copilot response quality

6. Model optimization strategies

7. Conversational Analytics and Business Storytelling

Conversational Reporting Techniques

1. Designing conversational experiences
2. Prompt refinement strategies
3. Context-aware interactions
4. Guided analytical workflows
5. User-centric reporting design

Executive Dashboard Design

1. Executive KPI frameworks
2. AI-generated executive summaries
3. Decision-support dashboards
4. Strategic analytics presentation
5. Boardroom reporting workflows

AI-Assisted Data Storytelling

1. Narrative analytics
2. Communicating insights effectively
3. Story-driven dashboard design
4. Business context integration
5. Audience-focused reporting

Mobile and Embedded Copilot Experiences

1. Mobile Power BI analytics
2. Conversational mobile reporting
3. Embedded Copilot concepts
4. Cross-platform reporting experiences
5. Remote executive analytics workflows

8. Governance, Security, and Responsible AI

Enterprise Governance for Copilot

1. Governance frameworks
2. AI usage policies
3. Organizational standards
4. Monitoring AI-generated outputs

5. Audit and compliance considerations

Security and Access Control

1. Role-based security
2. Row-level security concepts
3. Data protection considerations
4. Workspace security management
5. Secure sharing practices

Responsible AI Considerations

1. AI hallucination awareness
2. Validation of AI-generated insights
3. Ethical analytics practices
4. Bias and interpretation risks
5. Human oversight responsibilities

Operational and Administrative Considerations

1. Capacity planning concepts
2. Performance optimization
3. Licensing considerations
4. Adoption strategies
5. Enterprise deployment planning

9. Real-World Enterprise Use Cases

Sales and Revenue Analytics

1. Sales trend analysis
2. Territory performance monitoring
3. Pipeline analytics
4. Revenue forecasting workflows

Financial Analytics and Reporting

1. Financial dashboard development
2. Variance analysis
3. Profitability reporting
4. Executive financial storytelling

Operations and Supply Chain Analytics

1. Operational KPI monitoring
2. Inventory analytics
3. Logistics reporting

4. Process optimization insights

Human Resources and Workforce Analytics

1. Workforce performance analysis
2. Attrition monitoring
3. Recruitment analytics
4. Organizational reporting workflows

Executive Decision Intelligence

1. Strategic KPI monitoring
2. Board-level analytics
3. AI-assisted strategic insights
4. Decision acceleration workflows

10. Best Practices and Future Roadmap

Enterprise Best Practices

1. Report standardization
2. AI prompt optimization
3. Dashboard governance
4. Reusable reporting frameworks
5. Performance optimization strategies

Collaboration and Deployment

1. Workspace collaboration
2. Publishing workflows
3. Version control considerations
4. Report lifecycle management
5. Organizational adoption strategies

Emerging Microsoft AI and Power BI Innovations

1. Evolving Copilot capabilities
2. AI-driven semantic modeling
3. Advanced conversational analytics
4. Fabric AI roadmap considerations
5. Future enterprise analytics trends

Course Wrap-Up and Knowledge Consolidation

1. End-to-end AI analytics workflows
2. Enterprise implementation considerations
3. Operational readiness review

4. Skills reinforcement and next steps

Disclaimer: This training outline is intended solely as a general guideline for the proposed course delivery. The instructor reserves the right to modify, expand, reorganize, substitute, or omit any topic, module, or hands-on activity as deemed necessary to accommodate participant skill levels, organizational requirements, evolving technology updates, platform changes, scheduling considerations, or other instructional priorities without prior notice.

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