

POWER BI COPILOT IS CHANGING HOW USERS READ REPORTS

Every Power BI dashboard eventually receives the same feedback:

“Can we make this easier to understand?”

Most teams solve this by creating executive dashboards, summary tabs, or simplified report pages for leadership teams.

Microsoft Copilot introduces a different approach, allowing users to generate summaries directly inside the report they are already using.



Why This Matters

The challenge with Power BI is usually not building dashboards.

It is helping users quickly understand what the data is actually telling them.

Analysts are comfortable reading visuals, comparing trends, and navigating filters. Most business users are not interacting with reports that way every day. They open dashboards looking for quick answers and business context.

This is where Copilot becomes useful.

Inside Power BI, users can now ask Copilot to summarize the current report view in plain business language.

Users can:

- Filter reports by region, department, or time period
- Drill into specific business units or datasets
- Sort tables by revenue, growth, or variance
- Generate contextual summaries instantly

For example, a sales manager might filter the dashboard to the West Region, select Q2 results, and review top-performing customers.

Instead of manually analysing multiple charts and tables, Copilot can summarize the results in seconds:

“Sales in the West Region increased during Q2, driven primarily by enterprise renewals, while margins were slightly impacted by shipping costs.”

The value here is not replacing dashboards.

It is reducing the effort required to interpret them.

From an administrative perspective, this can also reduce the need to create separate summary pages purely for leadership reviews or quick business updates.



3 Ways To Improve Copilot Summaries

1. Filter Before Summarizing

Copilot summarizes the current report view. Applying filters first helps generate more focused and relevant insights

2. Structure Data to Highlight Trends

Sorting tables by revenue, growth, or variance helps Copilot identify important patterns and business changes more effectively.

3. Use Clear Naming Conventions

Copilot relies heavily on report metadata. Clear measure names, labels, and table structures improve the quality and readability of summaries.

Reality Tech’s Perspective

Organizations do not necessarily need more dashboard tabs.

They need faster access to insights and easier ways for users to understand data.

Copilot helps reduce manual interpretation while making Power BI reports more accessible for business users across the organization.

At Reality Tech, we are seeing growing interest in AI-powered reporting experiences that help organizations simplify dashboards without rebuilding their existing reporting structure.

The focus is no longer just on building reports it is about making data easier to consume, understand, and act on.

Want To Explore Copilot For Power BI?

Curious about how AI-powered reporting could help your organization deliver insights faster and improve user adoption?

Book a call with our team to discuss your reporting environment and discover practical ways to get more value from your Power BI investment.



Best regards,
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