



Rubbish In, Rubbish Out

Reuben Barry

Practice Director – Data & AI



This Session



Business Central

Data quality starts at the beginning

Set up your data structures for success



Microsoft Fabric

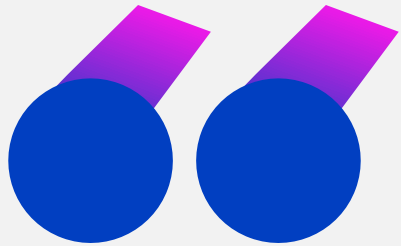
Enhanced Mirroring

Preparing your semantic model (“cube”) for both reporting and AI

01

Business Central

**Set up your ERP data structures to
support your downstream aspirations**



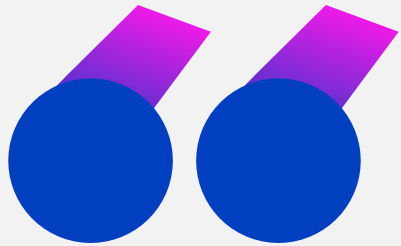
I know what Dimensions (in
Business Central) are





I know how Dimensions in
Business Central are inherited
by transactions





We have updated our
Dimensions once or more, since
they were first configured





I do not need to correct
Dimensions or categories in, or
add mappings to my data, in my
“reporting” processes



Dimensions in BC



Pitfalls we see with Dimensions



← Dimensions

✓ Saved

Dimension | More options

Code ↑	Name	Code Caption	Filter Caption	Description	Blocked
→ AREA	Area	Area Code	Area Filter		<input type="checkbox"/>
BUSINESSGROUP	Business Group	Businessgroup Code	Businessgroup Filter		<input type="checkbox"/>
COSTCENTRE	Cost Centre	Cost Centre Code	Cost Centre Filter		<input type="checkbox"/>
CUSTOMERGROUP	Customer Group	Customergroup Code	Customergroup Filter		<input type="checkbox"/>
DEPARTMENT	Department	Department Code	Department Filter		<input type="checkbox"/>
INDUSTRY	Industry	Industry Code	Industry Filter		<input type="checkbox"/>
ITEM-TYPE	Item-type	Item-type Code	Item-type Filter		<input type="checkbox"/>
PROJECT	Project	Project Code	Project Filter		<input type="checkbox"/>
PURCHASER	Purchaser	Purchaser Code	Purchaser Filter		<input type="checkbox"/>
SALESCAMPAIGN	Sales campaign	Salescampaign Code	Salescampaign Filter		<input type="checkbox"/>
SALESPERSON	Salesperson	Salesperson Code	Salesperson Filter		<input type="checkbox"/>
TERRITORY	Territory	Territory Code	Territory Filter		<input type="checkbox"/>

Code	Name	Dimension Value Type	Totalling	Blocked
→ ADM	Administration	Standard		<input type="checkbox"/>
PROD	Production	Standard		<input type="checkbox"/>
SALES	Sales	Standard		<input type="checkbox"/>

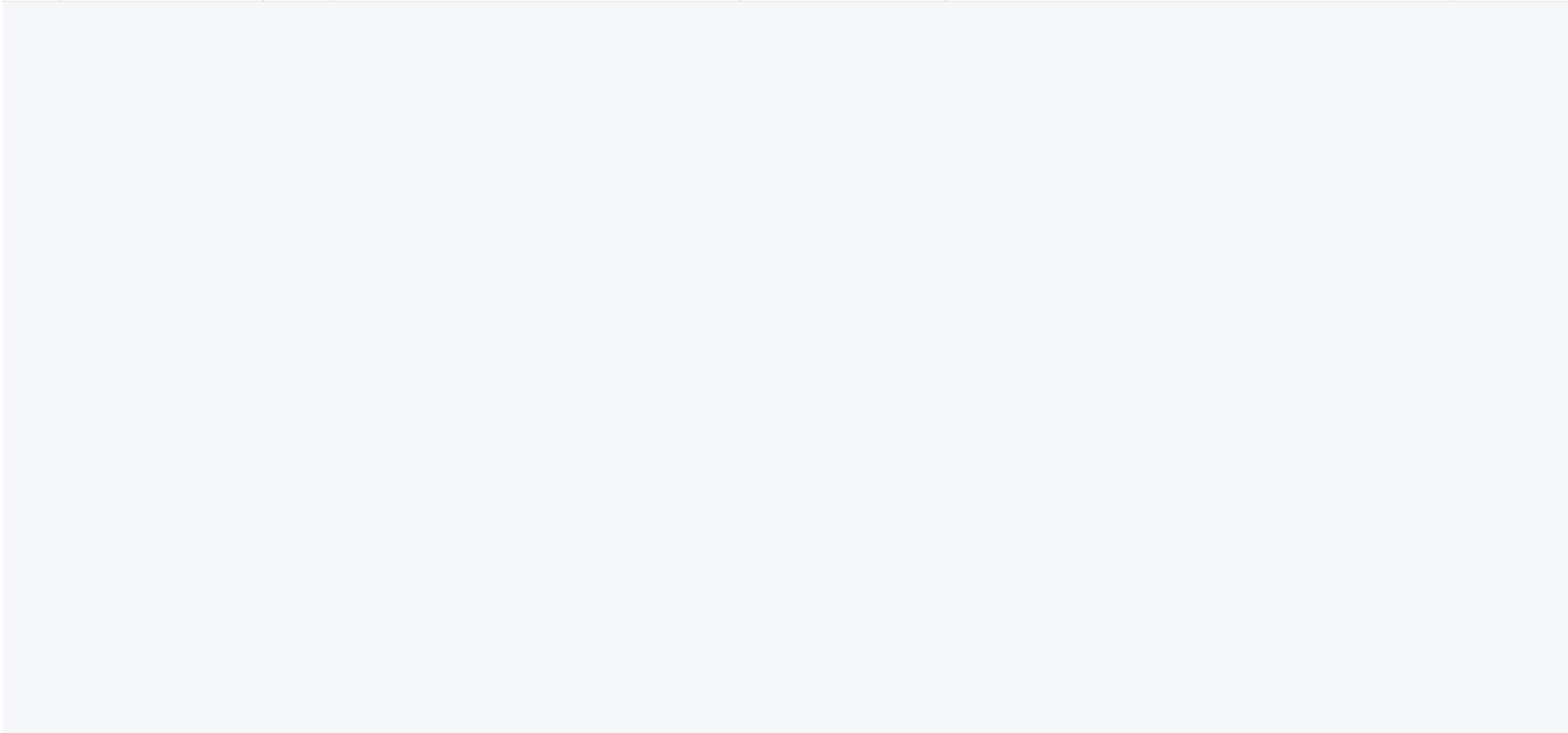


Chart of Accounts

Chart of Accounts: All

No.	Name
10000	INC
10001	Inc
10100	S
→ 10110	
10120	
10130	
10199	T
10200	S
10210	
10220	
10299	T
10300	A
10310	
10320	
10330	
10380	
10390	
10399	T
10400	J
10410	
10420	
10430	
10440	
10499	T
10900	R
10910	
10920	
10930	
10940	
10999	T
19990	TO
20001	CO
20100	C
20110	
20120	
20199	T
20200	C
20210	
20220	
20230	
20299	T
20300	C

G/L Account Card

10110 · Sale of Finished Goods

Home Account Balance Related Reports Automate Fewer options

- Dimensions**
- Comments
- Where-Used List
- Ledger Entries
- Extended Texts
- Receivables-Payables

General

Show more

No.	10110	Balance	-823,056.29
Name	Sale of Finished Goods	Reconciliation Account	<input type="checkbox"/>
Income/Balance	Income Statement	Automatic Ext. Texts	<input type="checkbox"/>
Account Category	Income	Direct Posting	<input checked="" type="checkbox"/>
Account Subcategory	Income, Product Sales	Blocked	<input type="checkbox"/>
Debit/Credit	Both	Last Date Modified	21/01/2025
Account Type	Posting	Omit Default Descr. in Jnl.	<input type="checkbox"/>
Totalling		Review Policy	None

Posting

Gen. Posting Type	Sale	VAT Prod. Posting Group	STANDARD
Gen. Bus. Posting Group	DOMESTIC	Default IC Partner G/L Acc. ...	
Gen. Prod. Posting Group	RETAIL	Default Deferral Template	
VAT Bus. Posting Group	DOMESTIC		

Consolidation >

Average Rate (Manual) No

Reporting >

No Adjustment

Cost Accounting >

Sustainability >

Summary

Preview

Details Attachments (0)

nHanced Information

nHanced FactBox

- Attachments 0
- User Tasks 0



Import

Import a file by dragging here or click to select

one No. Balance (LCY)

9,945.00

42,418.50

9,028.50

CROI Chart of Accounts

Chart of Accounts: All

No.	Name
10000	INC
10001	Ince
10100	Sa
→ 10110	:
10120	
10130	
10199	Te
10200	Sa
10210	
10220	
10299	Te
10300	Ac
10310	
10320	
10330	
10380	
10390	
10399	Te
10400	Je
10410	
10420	
10430	
10440	
10499	Te
10900	Re
10910	
10920	
10930	
10940	
10999	Te
19990	TOT
20001	COS
20100	Ce
20110	
20120	
20199	Te
20200	Ce
20210	
20220	
20230	
20299	Te
20300	Ce

G/L Account Card

10110 · Sal

Home Account Bal

Dimensions

General

No.

Name

Income/Balance

Account Category

Account Subcategory

Debit/Credit

Account Type

Totalling

Posting

Gen. Posting Type

Gen. Bus. Posting Group

Gen. Prod. Posting Group

VAT Bus. Posting Group

Consolidation >

Reporting >

Cost Accounting >

Sustainability >

G/L Account 10110

Not saved

Default Dimensions | + New | Edit List | Delete | More options

Dimension Code ↑	Dimension Value Code	Dimension Value Name	Value Posting	Allowed Values Filter
→ DEPARTMENT			Code Mandatory	

Reports

click to select

Line No.	Balance (LCY)
	9,945.00
	42,418.50
	9,028.50

CRO Customers

Customer Card

Customer 30000

✓ Saved

✓ Saved

Register Customer Paym...

Default Dimensions | + New | Edit List | Delete | More options

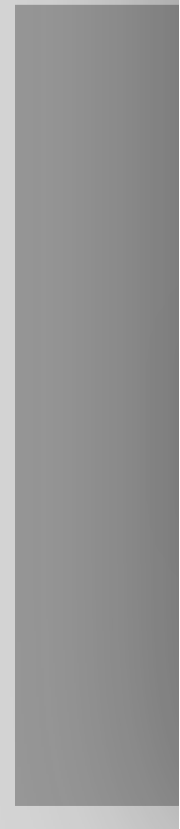
No. ↑	Name
10000	Adatum
20000	Trey Res
30000	School e
40000	Alpine S
44010	Brad and
44020	The Sea
44030	Sue Smi
44090	eComm
44095	eComm
44100	Loyalty C
44990	eComm
45010	Winter C
45020	The Mid
45030	The Big
45040	Joe Tayl
45050	The PEI
45060	Manuel
45070	Blue and
45080	All your
45090	The Out
45100	Michael
50000	Releclou
BIC-00001	BIC 1
BIC-00002	BIC 2
BIC-00003	BIC 3
BIC-00004	BIC 4
BIC-00005	BIC 5
BIC-00006	BIC 6
BIC-00007	BIC 7
BIC-00008	BIC 8
BIC-00009	BIC 9
BIC-00010	BIC 10
BIC-00011	BIC-11
BIC-00012	BIC-12

Home Request Appro Ledger Entries Dimensions

General

Name Balance (LCY) Balance (LCY) As Vendor Balance Due (LCY)

Web View



Dimension Code ↑	Dimension Value Code	Dimension Value Name	Value Posting	Allowed Values Filter
→ BUSINESSGROUP	HOME	Home		-
COSTCENTRE	SALES	Sales		-
CUSTOMERGROUP	LARGE	Large Business		-
TERRITORY	US-NA	North America		-

Reports

Some data you already have

0
0

click to select

Line No.	Balance (LCY)
30000	9,945.00
	42,418.50
	9,028.50

Default Dimension Behaviour

- BC merges default dimensions from **every entity involved in the transaction**
- Customer, Vendor, Item, G/L account – and more
- BC checks for conflicts and follows a priority order
- Unless adjusted – Header first, then line, and conflicts are then resolved by the lowest table ID

Further crucial set-ups

- GL account hierarchy
- Accounting Periods
- Item costing methods – margin analysis
- More than we can discuss today, depending on your analysis needs

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10299	T
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10380	
10390	
10399	T
10400	J
10410	
10420	
10430	
10440	
10499	T
10900	R
10910	
10920	
10930	
10940	
10999	T
19990	TO
20001	CO
20100	C
20110	
20120	
20199	T
20200	C
20210	
20220	
20230	
20299	T
20300	C

G/L Account Card

10110 · Sale of Finished Goods

Home Account Balance Related Reports Automate Fewer options

Posted Documents w...t Incoming Document Apply Template...

General

Show more

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Reporting >

No Adjustment

Cost Accounting >

Sustainability >

Summary

Details Attachments (0)

nHanced Information

nHanced FactBox

- Attachments 0
- User Tasks 0

Import
Import a file by dragging here or click to select

SO PA

Reports: nHanced Default Change Log (Sta...)

one No.	Balance (LCY)
	9,945.00
	42,418.50
	9,028.50

Sales Orders Shipped Not Invoiced Completely Shi... Not Invoiced

Notifications: 4 You have new Default Change Log settings to review for the follow...

Insight from the last three months

The largest posted sales invoice was for GBP21,500

Activities

For Release

Sales Quotes - Open 12	Sales Orders - Open 602	Completely Re... from Stock 3	Ready To Ship 0
----------------------------------	-----------------------------------	---	---------------------------

Insights

Upload File

Import

Import a file by dragging here or click to select

User Tasks

My User Tasks

Pending User Tasks
0

Approvals

Pending Approvals

Requests Sent ... Approval 0	Requests to Approve 0
--	---------------------------------

Accounting Periods

Inventory Period Create Year... Close Year

Starting Date ↑	Name	New Fiscal Year	Closed	Date Locked	Inventory Period Closed
→ 01/01/2024	January	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/02/2024	February	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/03/2024	March	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/04/2024	April	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/05/2024	May	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/06/2024	June	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/07/2024	July	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/08/2024	August	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/09/2024	September	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/10/2024	October	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/11/2024	November	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/12/2024	December	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
01/01/2025	January	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/02/2025	February	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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01/04/2025	April	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/05/2025	May	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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01/07/2025	July	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/08/2025	August	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/09/2025	September	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/10/2025	October	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/11/2025	November	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/12/2025	December	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/01/2026	January	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/02/2026	February	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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01/05/2026	May	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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01/07/2026	July	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/08/2026	August	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/09/2026	September	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/10/2026	October	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/11/2026	November	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
01/12/2026	December	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Reports
- Power BI Reports
- History

Emails in Box

Sent Emails Last 30 Days
0

Name	Phone No.	Balance (LCY)
Key Research		9,945.00
School of Fine Art		42,418.50
Alpine Ski House		9,028.50

Demo

02

nHanced Mirroring

Business Central and Microsoft Fabric



Announcing nHanced Mirroring!

Near real-time replication to Fabric





nHanced Mirroring

Near real-time
replication to Fabric



Register your interest

- Recorded in BC, available in Fabric in minutes
- Supports custom tables and fields – **no need for custom API endpoints for Fabric**
- No development needed for incremental load of large tables



nHanced Mirroring

Near real-time
replication to Fabric



Register your interest

Business Central configuration includes

- Entra Application (authentication)
- Extension installation
- Mirroring Profile
- Mirroring Groups
- Mirroring Tables
- Mirroring Fields

CRONUS UK Ltd | Sales | Purchasing | Inventory

Sales Orders | Shipped Not Invoiced | Completely Shi... Not

Notifications: 3 You have unclassified fields that requ... | This is a s

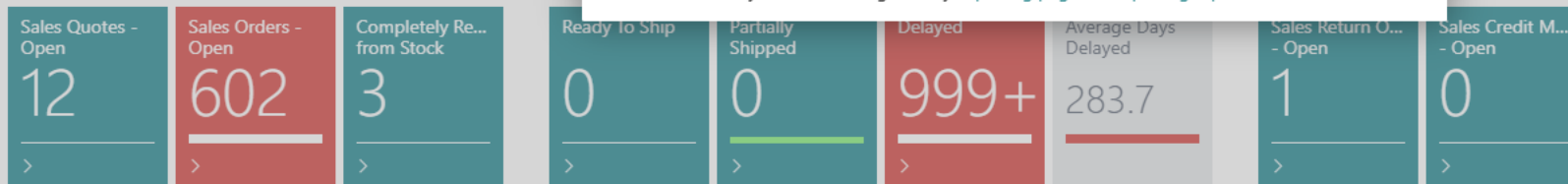
Headline

Hi, Reuben Barry!

● ○

Activities

For Release

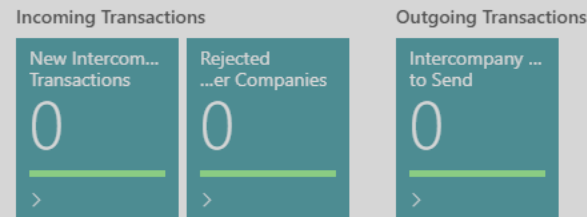


Insights

Upload File

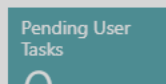
Import
Import a file by dragging here or click to select

Intercompany



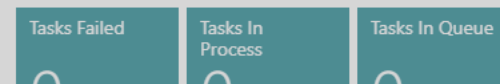
User Tasks

My User Tasks



Job Queue Tasks

Job Queue Tasks



Tell me what you want to do

mirroring

Go to Pages and Tasks

Show less (3)

- > Mirroring Setup Administration
- > Mirroring Packs Lists
- > Mirroring Tables Lists
- > Mirroring Profiles Lists
- > Mirroring Delete Log Lists

Search for 'mirroring'

Didn't find what you were looking for? Try exploring pages or exploring reports

CRONUS UK Ltd

Sales Orders Shipped Not

Notifications: 3 You have unc

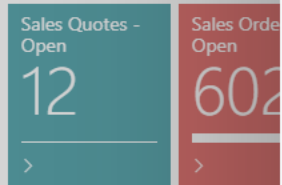
Headline

Hi, Reube

● ○

Activities

For Release



Insights

Panel 2

Panel 3

Panel 5

Panel 7

Panel 9

Upload File



Mirroring Profiles



+ New

Manage

Process

Navigate

Automate

Fewer options



Show more

Code ↑ ▼	Name	Engine	Status	No. of Mirroring Tables	No. of Mirroring Packs	No. of Failed Mirroring Packs
FABRIC MIRR_V2	Fabric Mirroring Profile V2	Fabric	Open	6	163	-
FABRIC RODE4...	Fabric Rode4 Sync	Fabric	Released	6	217	-



Change Log (Standard Syst... ▼

FABRIC MIRR V2

Release | Add Tables | Process | Create Job Queue Entry | Navigate | Automate | Fewer options

General

Show more

Code	<input type="text" value="FABRIC MIRR V2"/>	Mirroring Key Field	<input type="text" value="System ID"/>
Name	<input type="text" value="Fabric Mirroring Profile V2"/>	File Extension	<input type="text" value="csv"/>
Engine	<input type="text" value="Fabric"/>	Reset Marker On Field Insert	<input checked="" type="checkbox"/>
Status	Open		

Fabric Workspace

Workspace ID	<input type="text" value="4dabe4d6-b921-4bec-bcbd-d733e27afdd8"/>	File Format Group	
Database ID	<input type="text" value="90a8f886-db56-4656-9d83-ec85d5176854"/>	Fabric File Format	<input type="text" value="CSV"/>

Authentication

OAuth Status OK

Tables

Delete Line | Add | Process | Edit | View | New

Share | Print

Show more

Name	Mirroring Group Code	No. of Mirr. Fields	Status
→ Payment Terms	LOW	12	Processed
Currency	LOW	37	Processed
Country/Region	LOW	16	Processed
Salesperson/Purchaser	LOW	17	Processed
Location	LOW	65	Processed
G/L Entry	HIGH	72	Processed

- Mirroring Profile
- FABRIC MIR
- FABRIC RO

FABRIC MIRR V2

Release | Add Tables | Process | Create Job Queue Entry | Navigate | Automate | Fewer options

General

Code	<input type="text" value="FABRIC MIRR V2"/>	Mirroring Key Field	<input type="text" value="System ID"/>
Name	<input type="text" value="Fabric Mirroring Profile V2"/>	File Extension	<input type="text" value="csv"/>
Engine	<input type="text" value="Fabric"/>	Reset Marker On Field Insert	<input checked="" type="checkbox"/>
Status	Open		

Fabric Workspace

Workspace ID	<input type="text" value="4dabe4d6-b921-4bec-bcbd-d733e27afdd8"/>	File Format Group	
Database ID	<input type="text" value="90a8f886-db56-4656-9d83-ec85d5176854"/>	Fabric File Format	<input type="text" value="CSV"/>

Authentication

OAuth Status OK

Tables

Delete Line | Add | Process | Edit | View | New

Name	Mirroring Group Code	No. of Mirr. Fields	Status
→ Payment Terms	LOW	12	Processed
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Mirroring Profile

FABRIC MIRR V2

Release | Add Tables | Process | Create Job Queue Entry | Navigate | Automate | Fewer options

Status **Open**

Fabric Workspace

Workspace ID 4dabe4d6-b921-4bec-bcbd-d733e27afdd8

File Format Group

Database ID 90a8f886-db56-4656-9d83-ec85d5176854

Fabric File Format CSV

Authentication

OAuth Status **OK**

Tables | Manage | Move | Navigation

Delete Line | Add | Process | Edit | View | New

Name	Mirroring Group Code	No. of Mirr. Fields	Status
→ Payment Terms	LOW	12	Processed
Currency	LOW	37	Processed
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Processing >

Mirroring Profile

FABRIC MIRR V2

Release | Add Tables | Process | Create Job Queue Entry | Navigate | Automate | Fewer options

Status: **Open**

Fabric Workspace

Workspace ID: 4dabe4d6-b921-4bec-bcbd-d733e27afd8

File Format Group

Database ID: 90a8f886-db56-4656-9d83-ec85d5176854

Fabric File Format: CSV

Authentication

OAuth Status: **OK**

Tables | Manage | Move | Navigation

Delete Line | Add | Process | Edit | View | New

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Processing >

Mirroring Profile

FABRIC M

Reopen | + Add

Name

Engine

Status

Fabric Workspace

Workspace ID

Database ID

Authentication

OAuth Status

Tables | Manage

Delete Line | + Add

Name
Payment Terms
Currency
Country/Region
Salesperson/Pur
Location
→ G/L Entry

Mirroring Table - G/L Entry

Manage + Add Fields Processing Navigate Page

General

Mirroring Profile Code: FABRIC MIRR V2

Name: G/L Entry

Mirroring Group Code: HIGH

Record Marker

Record Marker Type: Timestamp

Reset Marker On Field...

Delete Tracking

Track Deletes

Fabric

Remote Folder Name: GLEntry

Remote Status Message: Remote Folder created and ...

Remote Status: Processed

Last File Name: 00000000000000000157

Fields | Delete Line | Add | Move Up | Move Down

Name	Data Type	Primary Key
→ System ID	GUID	<input checked="" type="checkbox"/>
Entry No.	Integer	<input type="checkbox"/>
G/L Account No.	Code (20)	<input type="checkbox"/>
Posting Date	Date	<input type="checkbox"/>
Document Type	Option	<input type="checkbox"/>
Document No.	Code (20)	<input type="checkbox"/>
Description	Text (100)	<input type="checkbox"/>

Close

FABRIC MIRR V2

[Release](#) | [+ Add Tables](#) | [Process](#) | [* Create Job Queue Entry](#) | [Navigate](#) | [Automate](#) | [Fewer options](#)

Status **Open**

Fabric Workspace

Workspace ID

File Format Group

Database ID

Fabric File Format

Authentication

OAuth Status **OK**

Tables | [Manage](#) | Move | Navigation

[Delete Line](#) | [+ Add](#) | [Process](#) | [Edit](#) | [View](#) | [New](#)

Show more

Name	Mirroring Group Code	No. of Mirr. Fields	Status
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Salesperson/Purchaser	LOW	17	Processed
Location	LOW	65	Processed
→ G/L Entry	HIGH	72	Processed

Processing >

Codeunit · 85732 · Mirr. Processing nHd

Home Job Queue Automate Fewer options

Set Status to Ready Set On Hold Restart Run once (foreground) Show Error

General

Show less

Object Type to Run	Codeunit	Maximum No. of Attempts to Run	0
Object ID to Run	85732	Rerun Delay (sec.)	0
Object Caption to Run	Mirr. Processing nHd	Last Ready State	27/04/2026 12:36
Description	Process Mirroring Profile - FABRIC MIRR V2	Earliest Start Date/Time	
Parameter String	FABRIC MIRR V2	Expiration Date/Time	
Job Queue Category Code		Job Timeout	12 hours
Priority	Normal	Status	On Hold
User ID	REUBEN.BARRY	Job Queue Monitor	<input type="checkbox"/>

Recurrence

Recurring Job	<input type="checkbox"/>	Next Run Date Formula	
Run on Mondays	<input checked="" type="checkbox"/>	Starting Time	00:05:00
Run on Tuesdays	<input checked="" type="checkbox"/>	Ending Time	23:59:59
Run on Wednesdays	<input checked="" type="checkbox"/>	No. of Minutes between Runs	15
Run on Thursdays	<input checked="" type="checkbox"/>	Inactivity Timeout Period	5
Run on Fridays	<input checked="" type="checkbox"/>		
Run on Saturdays	<input checked="" type="checkbox"/>		
Run on Sundays	<input checked="" type="checkbox"/>		

Mirroring Packs



Reset Process Cancel View Delete Pack Navigation Home More options



Mirroring Profile Mirroring Group Mirroring Table



Show more

Table Name	Pack Type	Content Type	Has Content	Created Date	Created Time	Status	Completed Date	Completed Time
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:51	Processed	27/04/2026	09:55:20
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:51	Processed	27/04/2026	09:55:20
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:48	Processed	27/04/2026	09:55:19
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:44	Processed	27/04/2026	09:55:19
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:41	Processed	27/04/2026	09:55:19
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:38	Processed	27/04/2026	09:55:19
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:36	Processed	27/04/2026	09:55:19
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:34	Processed	27/04/2026	09:55:18
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:31	Processed	27/04/2026	09:55:18
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:29	Processed	27/04/2026	09:55:18
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:27	Processed	27/04/2026	09:55:18
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:24	Processed	27/04/2026	09:55:18
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:22	Processed	27/04/2026	09:55:18
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:19	Processed	27/04/2026	09:55:18
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:17	Processed	27/04/2026	09:55:17
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:15	Processed	27/04/2026	09:55:17
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:12	Processed	27/04/2026	09:55:17
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:10	Processed	27/04/2026	09:55:17
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:08	Processed	27/04/2026	09:55:17
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:05	Processed	27/04/2026	09:55:17
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:03	Processed	27/04/2026	09:55:16
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:54:00	Processed	27/04/2026	09:55:16
G/L Entry	Change	csv	<input checked="" type="checkbox"/>	27/04/2026	09:53:58	Processed	27/04/2026	09:55:16



nHanced Mirroring

Near real-time
replication to Fabric



Register your interest

Microsoft Fabric configuration includes

- Create Mirrored Database

Demo

- Home
- Copilot
- Create
- Browse
- Apps
- Scorecards
- OneLake catalog
- Learn
- Monitor
- Real-Time
- Workloads
- Workspaces
- BC Open Mirroring ..
- bc_mirroring_database
- ...
- Power BI

BC Open Mirroring Project

+ New item New folder → Import Migrate

Choose from predesigned tasks

Select from one of Microsoft's predesigned tasks

Select a predesigned task

Name	Status	Type	Task	Overview
bc_mirroring_database		Mirrored database	—	Pa...
bc_mirroring_database		SQL analytics en...	—	Pa...

New item

Favorites All items

mirrored database Filter

- Mirrored Azure Cosmos DB**
Easily replicate data from an existing source into an analytics-friendly format.
- Mirrored Azure Database for PostgreSQL**
Easily replicate data from an existing source into an analytics-friendly format.
- Mirrored Azure Databricks catalog**
Explore Unity Catalog Tables
- Mirrored Azure SQL Database**
Easily replicate data from an existing source into an analytics-friendly format.
- Mirrored Azure SQL Managed Instance**
Easily replicate data from an existing source into an analytics-friendly format.
- Mirrored database**
Easily replicate data from an existing source into an analytics-friendly format.
- Mirrored Snowflake**
Easily replicate data from an existing source into an analytics-friendly format.
- Mirrored SQL Server**
Easily replicate data from an existing source into an analytics-friendly format.

A SQL analytics endpoint for SQL querying and a default Power BI semantic model for reporting were created with this item.

Explorer

Search

Replication status

- bc_mirroring_database
 - Tables in OneLake
 - dbo
 - Uploaded files
 - CountryRegion
 - Currency
 - GLEntry
 - Location
 - PaymentTerms
 - SalespersonPurchaser

Replication status

Details for bc_mirroring_database

Mirrored database ID
90a8f886-db56-4656-9d83-ec85d5176854

Landing zone
<https://onelake.dfs.fabric.microsoft.com/4dabe4d6-b921-4bec-bcbd-d733e27afdd8/90a8f886-db56-...>

Create a semantic model
Create a new semantic model for Power BI reports using mirrored data.
Create semantic model

Query this data
Use T-SQL to query and analyze mirrored data.
Query in T-SQL

Monitor replication

Here are the tables from the source. After replication is complete, the tables are then synced to the mirrored item's SQL analytics endpoint. You can also utilize workspace monitoring along with mirrored database operation logs to gain deeper insights and enable proactive monitoring. [Learn more](#)

Status
Running

Refresh

Filter by keyword Filter

Name	Status	Rows replicated	Last completed
SalespersonPurchaser	Running	13	4/27/2026, 9:23 AM
Location	Running	36	4/27/2026, 9:29 AM
Currency	Running	49	4/27/2026, 9:29 AM
CountryRegion	Running	280	4/27/2026, 9:33 AM
GLEntry	Running	1562842	4/27/2026, 9:58 AM
PaymentTerms	Running	12	4/27/2026, 9:29 AM

Mirroring Profile

FABRIC MIRR V2

Release | Add Tables | Process | Create Job Queue Entry | Navigate | Automate | Fewer options

General

Code: FABRIC MIRR V2

Name: Fabric Mirroring Profile V2

Engine: Fabric

Status: Open

Mirroring Key Field: System ID

File Extension: csv

Reset Marker On Field Insert:

Fabric Workspace

Workspace ID: 4dabe4d6-b921-4bec-bcbd-d733e27afdd8

Database ID: 90a8f886-db56-4656-9d83-ec85d5176854

File Format Group

Fabric File Format: CSV

Authentication

OAuth Status: OK

Tables | Manage | Move | Navigation

Delete Line | Add | Process | Edit | View | New

Name	Mirroring Gr
→ Payment Terms	LOW
Currency	LOW
Country/Region	LOW
Salesperson/Purchaser	LOW
Location	LOW
G/L Entry	HIGH

https://app.fabric.microsoft.com/groups/4dabe4d6-b921-4bec-bcbd-d733e27afdd8/mirroredatabases/90a8f886-db56-4656-9d83-ec85d5176854?experience=power-bi

bc_mirroring_database

Home

Stop replication | Manage OneLake security | Upload files

A SQL analytics endpoint for SQL querying and a default Power BI semantic model for reporting were created with this item.

Explorer

- bc_mirroring_database
 - Tables in OneLake
 - dbo
 - Uploaded files

Replication status

Details for bc_mirroring_database

- Mirrored database ID: 90a8f886-db56-4656-9d83-ec85d5176854
- Landing zone: https://onlake.dfs.fabric.microsoft.com/4dabe4d6-b921-4bec-bcbd-d733e27afdd8/90a8f886-db56-...

17	Processed
65	Processed
72	Processed

Explorer

- Warehouses
- bc_mirroring_database
 - Schemas
 - dbo
 - Tables
 - CountryReq
 - Currency
 - GLEntry
 - Location
 - PaymentTe
 - Salesperso
 - Views
 - Functions
 - Stored Proce...
 - INFORMATION_...
 - queryinsights
 - sys
 - Security
 - Queries
 - My queries
 - Shared queries

GLEntry

Data preview - GLEntry Showing 1000 rows Search

	ABC SystemID	123 EntryNo	ABC GLAccou...	PostingD...	ABC Docume...	ABC Docume...	ABC Descripti...	ABC BalAccou...	12F AmountL...	12F SourceC...	12F SourceVA...	ABC SourceC...	ABC GlobalDi...	ABC GlobalDi...	ABC UserID	AB
1	{65D6B538-D...	12881	78100	2025-07-24	Payment	103912	Order DF-004...	C01310	2137	0	0				ROBERT.PACZ...	SA
2	{8ED6B538-D...	12886	78100	2025-07-24	Payment	103913	Order DF-004...	C01320	2137	0	0				ROBERT.PACZ...	SA
3	{50D8B538-D...	12891	78100	2025-07-24	Payment	103914	Order DF-004...	C01330	2137	0	0				ROBERT.PACZ...	SA
4	{CDDAB538-...	12896	78100	2025-07-24	Payment	103915	Order DF-004...	C01340	2137	0	0				ROBERT.PACZ...	SA
5	{47DD8B538-D...	12901	78100	2025-07-24	Payment	103916	Order DF-004...	C01350	2137	0	0				ROBERT.PACZ...	SA
6	{2DE0B538-D...	12906	78100	2025-07-24	Payment	103917	Order DF-004...	C01360	2137	0	0				ROBERT.PACZ...	SA
7	{66E2B538-D...	12911	78100	2025-07-24	Payment	103918	Order DF-004...	C01370	2137	0	0				ROBERT.PACZ...	SA
8	{DDE4B538-D...	12916	78100	2025-07-24	Payment	103919	Order DF-004...	C01380	2137	0	0				ROBERT.PACZ...	SA
9	{151EAE3E-D...	12921	78100	2025-07-24	Payment	103920	Order DF-004...	C01390	2137	0	0				ROBERT.PACZ...	SA
10	{1820AE3E-D...	12926	78100	2025-07-24	Payment	103921	Order DF-004...	C01400	2137	0	0				ROBERT.PACZ...	SA
11	{B121AE3E-D...	12931	78100	2025-07-24	Payment	103922	Order DF-004...	C01410	2137	0	0				ROBERT.PACZ...	SA
12	{3A23AE3E-D...	12936	78100	2025-07-24	Payment	103923	Order DF-004...	C01420	2137	0	0				ROBERT.PACZ...	SA
13	{B024AE3E-D...	12941	78100	2025-07-24	Payment	103924	Order DF-004...	C01430	2137	0	0				ROBERT.PACZ...	SA
14	{0427AE3E-D...	12946	78100	2025-07-24	Payment	103925	Order DF-004...	C01440	2137	0	0				ROBERT.PACZ...	SA
15	{7229AE3E-D...	12951	78100	2025-07-24	Payment	103926	Order DF-004...	C01450	2137	0	0				ROBERT.PACZ...	SA
16	{112BAE3E-D...	12956	78100	2025-07-24	Payment	103927	Order DF-004...	C01460	2137	0	0				ROBERT.PACZ...	SA
17	{DF2CAE3E-D...	12961	78100	2025-07-24	Payment	103928	Order DF-004...	C01470	2137	0	0				ROBERT.PACZ...	SA
18	{E62DAE3E-D...	12966	78100	2025-07-24	Payment	103929	Order DF-004...	C01480	2137	0	0				ROBERT.PACZ...	SA
19	{6364A644-D...	13004	78100	2025-07-24	Payment	103941	Order DF-003...	C00510	2137	0	0				ROBERT.PACZ...	SA
20	{7F64A644-D...	13009	78100	2025-07-24	Payment	103942	Order DF-003...	C00520	2137	0	0				ROBERT.PACZ...	SA
21	{9B64A644-D...	13014	78100	2025-07-24	Payment	103943	Order DF-003...	C00530	2137	0	0				ROBERT.PACZ...	SA
22	{CB64A644-D...	13019	78100	2025-07-24	Payment	103944	Order DF-003...	C00540	2137	0	0				ROBERT.PACZ...	SA
23	{0565A644-D...	13024	78100	2025-07-24	Payment	103945	Order DF-003...	C00550	2137	0	0				ROBERT.PACZ...	SA
24	{8C0CA14A-D...	13029	78100	2025-07-24	Payment	103946	Order DF-003...	C00560	2137	0	0				ROBERT.PACZ...	SA
25	{AB0CA14A-D...	13034	78100	2025-07-24	Payment	103947	Order DF-003...	C00570	2137	0	0				ROBERT.PACZ...	SA
26	{C70CA14A-D...	13039	78100	2025-07-24	Payment	103948	Order DF-003...	C00580	2137	0	0				ROBERT.PACZ...	SA
27	{E30CA14A-D...	13044	78100	2025-07-24	Payment	103949	Order DF-003...	C00590	2137	0	0				ROBERT.PACZ...	SA
28	{FF0CA14A-D...	13049	78100	2025-07-24	Payment	103950	Order DF-003...	C00600	2137	0	0				ROBERT.PACZ...	SA
29	{180DA14A-D...	13054	78100	2025-07-24	Payment	103951	Order DF-003...	C00610	2137	0	0				ROBERT.PACZ...	SA
30	{370DA14A-D...	13059	78100	2025-07-24	Payment	103952	Order DF-003...	C00620	2137	0	0				ROBERT.PACZ...	SA
31	{530DA14A-D...	13064	78100	2025-07-24	Payment	103953	Order DF-003...	C00630	2137	0	0				ROBERT.PACZ...	SA
32	{6F0DA14A-D...	13069	78100	2025-07-24	Payment	103954	Order DF-003...	C00640	2137	0	0				ROBERT.PACZ...	SA

Object Explorer

- Connect
- lbuolnj4gqjennjxid34pbnyi-23skwtjbxhwexpf524z6e6x53a.datawarehouse
- Databases
 - System Databases
 - bc_mirroring_database
 - Tables
 - System Tables
 - External Tables
 - dbo.CountryRegion
 - dbo.Currency
 - dbo.GLEntry
 - dbo.Location
 - dbo.PaymentTerms
 - dbo.SalespersonPurchaser
 - Dropped Ledger Tables
 - Views
 - External Resources
 - Programmability
 - XEvent Profiler
 - Security

```
SELECT TOP (1000) [SystemID]
,[EntryNo]
,[GLAccountNo]
,[PostingDate]
,[DocumentType]
,[DocumentNo]
,[Description]
,[BalAccountNo]
,[AmountLCY]
,[SourceCurrencyAmount]
,[SourceVATCurrencyAmount]
,[SourceCurrencyCode]
,[GlobalDimension1Code]
,[GlobalDimension2Code]
,[UserID]
,[SourceCode]
,[SystemCreatedEntry]
,[PriorYearEntry]
,[ProjectNo]
,[Quantity]
,[VATAmount]
,[BusinessUnitCode]
,[JournalBatchName]
,[ReasonCode]
,[GenPostingType]
,[GenBusPostingGroup]
```

100 %

Results Messages

	SystemID	EntryNo	GLAccountNo	PostingDate	Document Type	DocumentNo	Description	BalAccountNo	AmountLCY	SourceCurrencyAmount	SourceVATCurrencyAmount	SourceCurrencyCode	GlobalDimension1Code	GlobalDime
1	{65D6B538-D172-F011-8EEF-000D3A7F9C4D}	12881	78100	2025-07-24	Payment	103912	Order DF-00469	C01310	2137	0	0			
2	{8ED6B538-D172-F011-8EEF-000D3A7F9C4D}	12886	78100	2025-07-24	Payment	103913	Order DF-00470	C01320	2137	0	0			
3	{50D8B538-D172-F011-8EEF-000D3A7F9C4D}	12891	78100	2025-07-24	Payment	103914	Order DF-00471	C01330	2137	0	0			
4	{CDDAB538-D172-F011-8EEF-000D3A7F9C4D}	12896	78100	2025-07-24	Payment	103915	Order DF-00472	C01340	2137	0	0			
5	{47DD8B538-D172-F011-8EEF-000D3A7F9C4D}	12901	78100	2025-07-24	Payment	103916	Order DF-00473	C01350	2137	0	0			
6	{2DE0B538-D172-F011-8EEF-000D3A7F9C4D}	12906	78100	2025-07-24	Payment	103917	Order DF-00474	C01360	2137	0	0			
7	{66E2B538-D172-F011-8EEF-000D3A7F9C4D}	12911	78100	2025-07-24	Payment	103918	Order DF-00475	C01370	2137	0	0			
8	{DDE4B538-D172-F011-8EEF-000D3A7F9C4D}	12916	78100	2025-07-24	Payment	103919	Order DF-00476	C01380	2137	0	0			
9	{151EAE3E-D172-F011-8EEF-000D3A7F9C4D}	12921	78100	2025-07-24	Payment	103920	Order DF-00477	C01390	2137	0	0			
10	{1820AE3E-D172-F011-8EEF-000D3A7F9C4D}	12926	78100	2025-07-24	Payment	103921	Order DF-00478	C01400	2137	0	0			
11	{B121AE3E-D172-F011-8EEF-000D3A7F9C4D}	12931	78100	2025-07-24	Payment	103922	Order DF-00479	C01410	2137	0	0			
12	{3A23AE3E-D172-F011-8EEF-000D3A7F9C4D}	12936	78100	2025-07-24	Payment	103923	Order DF-00480	C01420	2137	0	0			
13	{B024AE3E-D172-F011-8EEF-000D3A7F9C4D}	12941	78100	2025-07-24	Payment	103924	Order DF-00481	C01430	2137	0	0			
14	{0427AE3E-D172-F011-8EEF-000D3A7F9C4D}	12946	78100	2025-07-24	Payment	103925	Order DF-00482	C01440	2137	0	0			
15	{7229AE3E-D172-F011-8EEF-000D3A7F9C4D}	12951	78100	2025-07-24	Payment	103926	Order DF-00483	C01450	2137	0	0			
16	{112BAE3E-D172-F011-8EEF-000D3A7F9C4D}	12956	78100	2025-07-24	Payment	103927	Order DF-00484	C01460	2137	0	0			
17	{DF2CAE3E-D172-F011-8EEF-000D3A7F9C4D}	12961	78100	2025-07-24	Payment	103928	Order DF-00485	C01470	2137	0	0			
18	{E62DAE3E-D172-F011-8EEF-000D3A7F9C4D}	12966	78100	2025-07-24	Payment	103929	Order DF-00486	C01480	2137	0	0			

Query executed successfully.

03

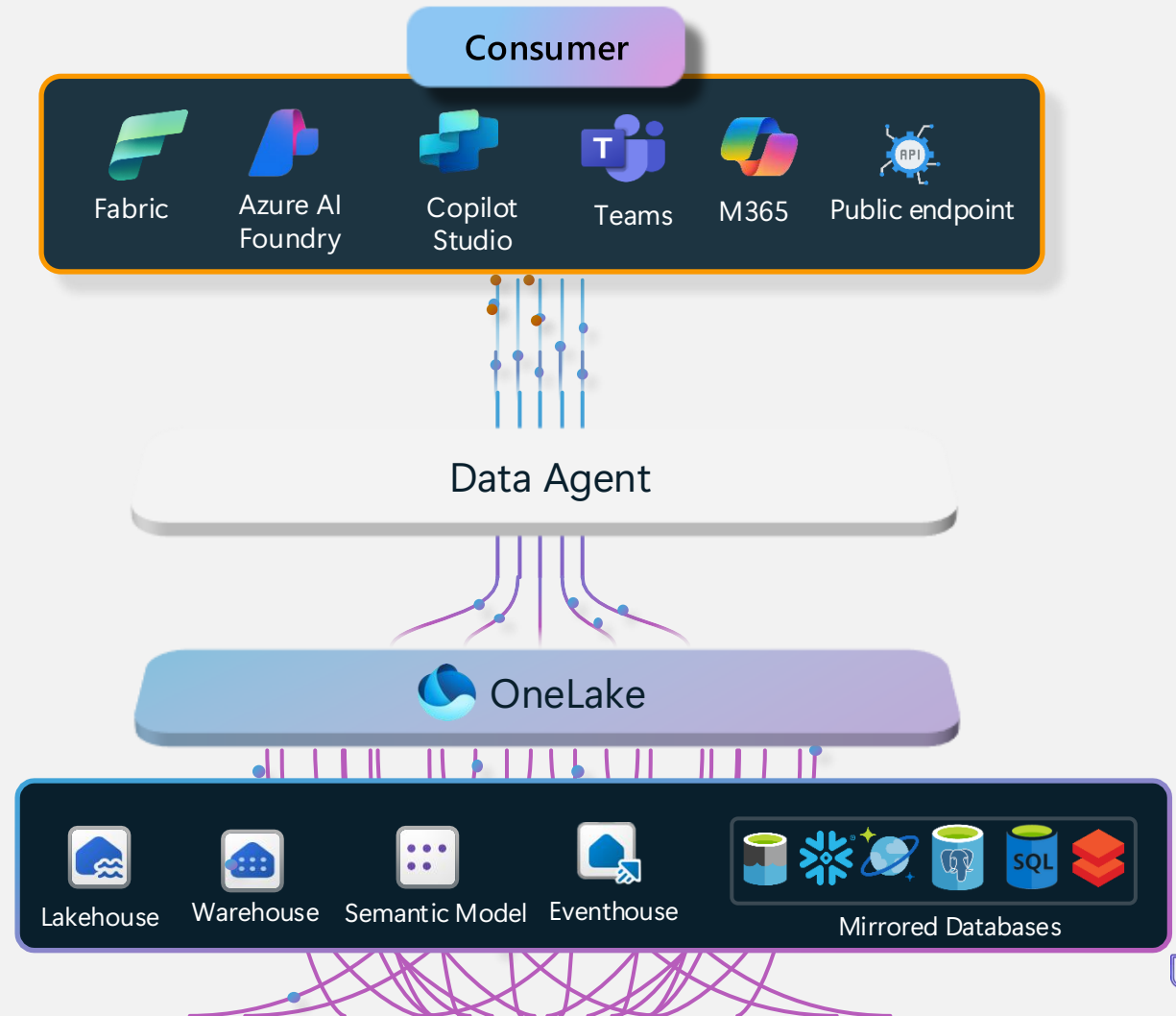
Preparing Data for AI

Get the most out of Fabric Data Agents

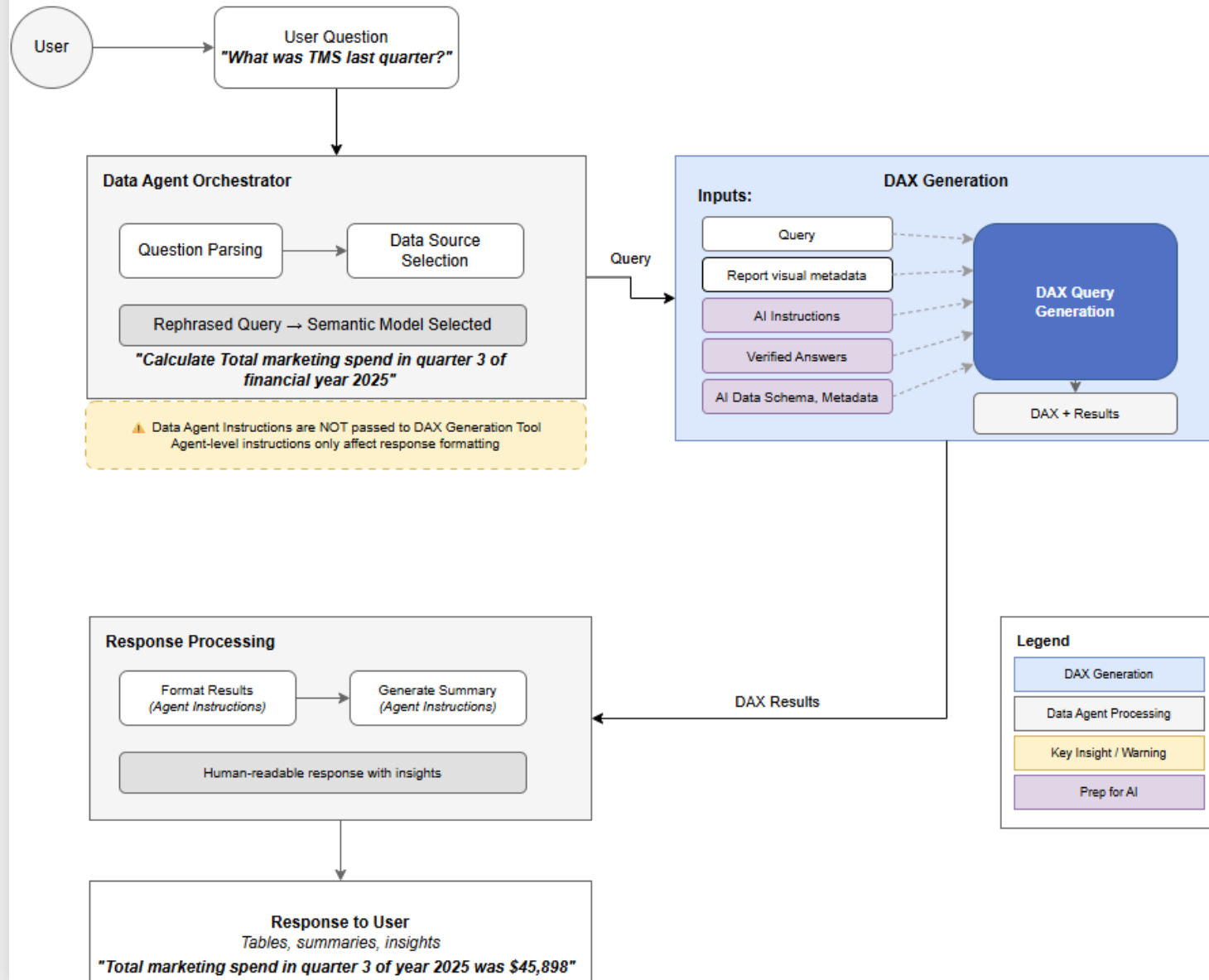
Data Agents

Deliver custom generative AI experiences for **your data**

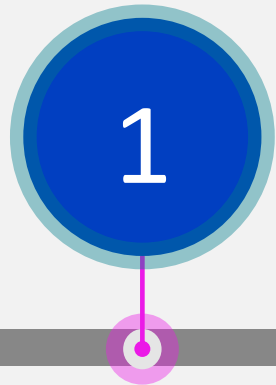
- Allow your users to talk to data in Fabric and in M365 Copilot
- Create, curate and configure a **data expert that you can trust**, grounded in on your data domain
- Share Data Agent with other creators and consumers in Fabric



Fabric Data Agent: Query Processing Flow for Semantic Models



Preparing for a Data Agent



Optimise the Semantic Model

Ensure best practices, performant, as lean as possible



Run "Prep for AI" wizard

Establish an AI Data Schema, and add AI Instructions to your semantic model



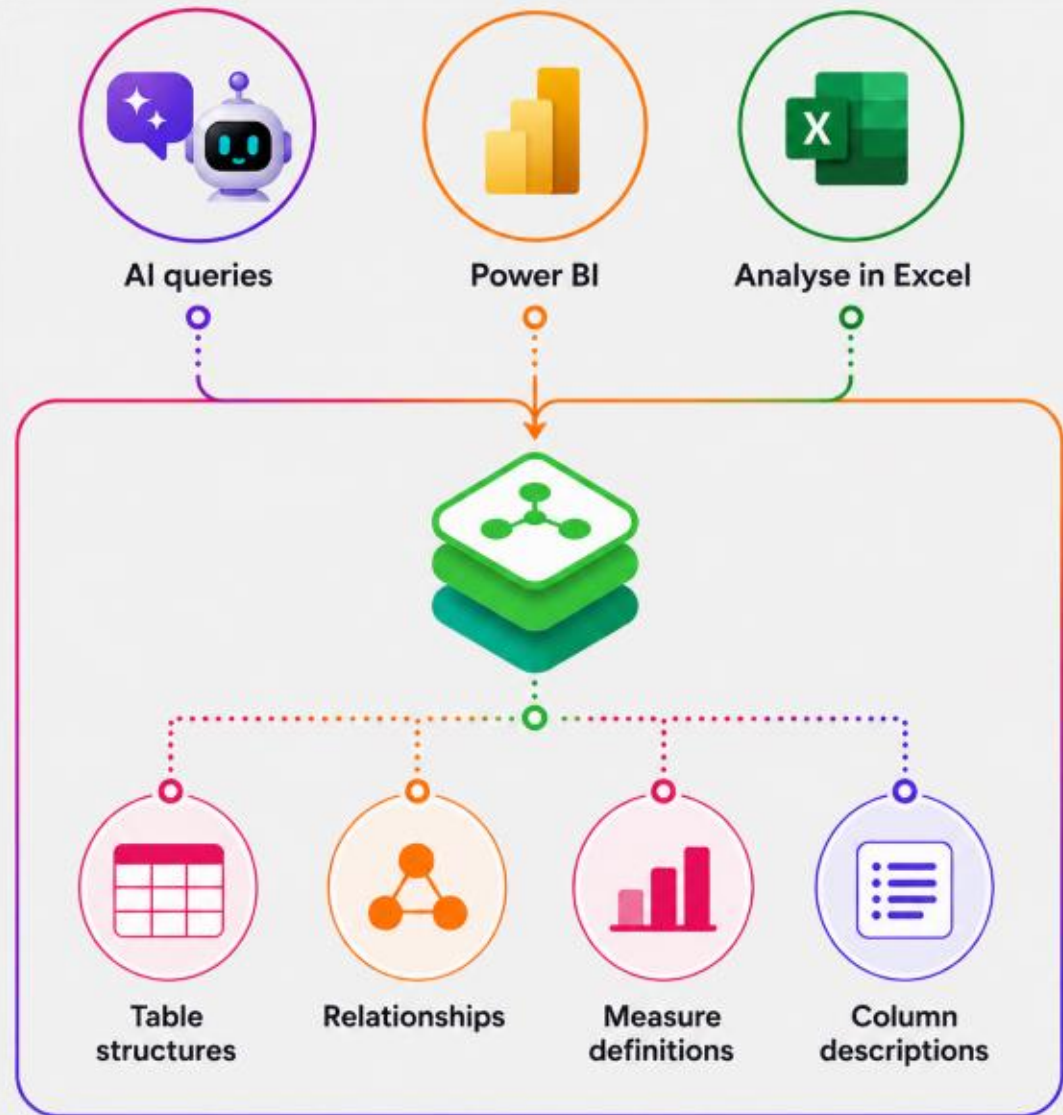
Test and iterate

Test and validate responses from the data agent, and add additional AI instructions to improve responses

Guiding Principles

- Create specific agents over specific domains – e.g. “Finance Assistant”
- Minimise scope - the best way to do this is to use a specific semantic model (**cube**)
- Do the groundwork in that cube to enable trust

Semantic Model



Star schema wins



Built for scale. Power BI engine is optimised for star schema and ensures performance at scale.

Business Terminology

- The same terminology that humans use in the business, must be embedded in the model
- Do users mean different things by **sales, revenue, turnover, income**, or are they all the same?
- **Customers, clients, accounts, contacts**
- This drives semantic model design and AI instructions

Preview Code Blame 76 lines (66 loc) · 6.91 KB

Raw Copy Download Edit More

Semantic Model Preparation Checklist for Fabric Data Agent

This checklist helps you prepare your Power BI semantic model for use with Fabric Data Agent. It covers semantic model optimization, Prep for AI configuration (AI data schema, verified answers, AI instructions), Data Agent setup, and testing. Use it as a reference to ensure your model is ready to deliver accurate, fast responses to natural language questions. Refer to the [documentation](#) for the latest guidelines and limitations.

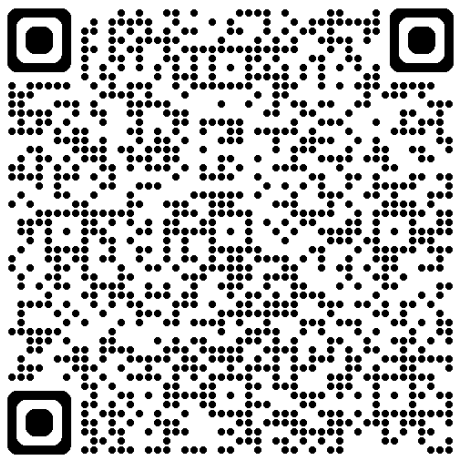
Semantic Model Optimization

- ⚠ Use star schema with clear fact and dimension tables (avoid flat, denormalized, or pivoted data structures)
- Run [Best Practice Analyzer](#) in a Fabric notebook
- Run [Semantic Model Memory Analyzer](#) in a Fabric notebook
- If using Direct Lake semantic model, perform Direct Lake specific optimizations such as V-Order. See [optimization guidance](#).
- Fix incorrect data types
- Remove unnecessary columns and tables
- Use [Performance Analyzer](#) to test query performance on measures included in the AI data schema
- Use clear, business-friendly names for tables, columns, and measures (not TR_AMT, CustName)
- Add descriptions to tables, columns, and measures. The purpose of the description is to help AI understand the context, add description accordingly. Keep it concise.
- Add synonyms in Power BI Desktop for commonly used alternative terms the users may use
- Define [row label](#) especially for dimension tables
- Create explicit DAX measures (avoid relying on implicit measures)
- Set correct default summarization on numeric columns
- If you have report-scoped measures that the Data Agent should use, move them to the semantic model (report-scoped measures are not accessible to the Data Agent)
- Consolidate or differentiate duplicate/overlapping measures

AI Data Schema (Prep for AI > Simplify data schema)

For semantic models, Data Agent uses `Prep for AI` configuration of the semantic model. To learn more, refer to the [Prep for AI documentation](#)

- Define the scope of your Data Agent (list of questions it should/should not answer, user personas, what's out of scope, security requirements etc)



Prep for AI

- Guided wizard in Fabric for a semantic model
- AI schema (what tables, fields and measures can the agent see)
- AI instructions (guidance for common questions, patterns, terminology)

Demo



Choose from predesigned task flows or add a task to build one

Select from one of Microsoft's predesigned task flows or add a task to start building one yourself.

Select a predesigned task flow Add a task

Import a task flow

Power Pack - Demo > Semantic Models

Name	Status	Git status	Type	Task	Owner	Refreshed	Next refresh	Endorsement	Sensitivity	Included in app
AP DATASET	Synced	✓ Synced	Semantic model	—	Power Pack - D...	24/04/2026, 01:08:...	25/04/2026, 01:00:...	—	—	
AR DATASET	Synced	✓ Synced	Semantic model	—	Power Pack - D...	24/04/2026, 01:08:...	25/04/2026, 01:00:...	—	—	
FINANCE DATASET	Synced	✓ Synced	Semantic model	—	Power Pack - D...	24/04/2026, 01:07:...	25/04/2026, 01:00:...	—	—	
SALES AND INVENTORY DATASET	Synced	✓ Synced	Semantic model	—	Power Pack - D...	24/04/2026, 01:07:...	25/04/2026, 01:00:...	—	—	

Semantic model FINANCE DATASET

Overview | Lineage | Monitor | Permissions

Make this item more discoverable by adding a description. Just start typing...

Location: **Power Pack - Demo** | Refreshed: **24/04/26, 01:07:41** | Owner: **Jordan Mitchell**

Tables Filter by keyword

Name	Type	Description
> Closing Entry	Table	
> Dates	Table	
> Dimension Field Parameters	Table	
> Dimension Tooltip	Table	
> Dynamic Dates	Table	Disconnected Dates table
> GL Accounts	Table	
> GL Document	Table	
> Global Dimension 1	Table	
> Global Dimension 2	Table	
> Global Dimension 3	Table	
> Global Dimension 4	Table	
> Global Dimension 5	Table	
> Global Dimension 6	Table	

Semantic model FINANCE

Overview | Lineage

Make this item more ...
Location
Power Pack - Demo

Tables

Name

>	Closing Ent	
>	Dates	
>	Dimension	
>	Dimension	
>	Dynamic D	
>	GL Account	
>	GL Docume	
>	Global Dim	
>	Global Dim	
>	Global Dim	
>	Global Dimension 4	Table
>	Global Dimension 5	Table
>	Global Dimension 6	Table

Prep data for AI

- Get started
 - Simplify the data schema
 - Verified answers
 - Add AI instructions



Prep this model to be AI-ready

Improve Copilot insights about this semantic model in a few simple steps. Your changes will apply to all Copilot chats, but updates may take a moment. [Learn more](#)

Simplify the data schema

Improve response accuracy by deselecting fields Copilot doesn't need to analyze.

Verified answers

Save predefined responses for your most critical business topics.

Add AI instructions

Help Copilot understand industry terms, business priorities, and important data fields.

Filter by keyword

- Home
- Copilot
- Create
- Browse
- Apps
- Scorecards
- OneLake catalog
- Learn
- Monitor
- Real-Time
- Workloads
- Workspaces
- Power Pack - Demo
- FinancialBud get
- DEV Utilisation ...
- Power BI

Open | File | Refresh | Prep data for AI | Explore | Write DAX queries | Model health | Analyze in Excel | Share

Semantic model FINANCE

Overview | Lineage

Make this item more

Location
Power Pack - Demo

Tables

Name	
> Closing Ent	
> Dates	
> Dimension	
> Dimension	
> Dynamic D	
> GL Account	
> GL Docume	
> Global Dim	
> Global Dim	
> Global Dim	
> Global Dimension 4	Table
> Global Dimension 5	Table
> Global Dimension 6	Table

Prep data for AI

Get started

Simplify the data schema

Verified answers

Add AI instructions

Simplify the data schema (preview)

Improve response accuracy by deselecting fields Copilot doesn't need to analyze. This creates a dedicated AI data schema saved with your semantic model. [Learn more](#)

Filter by keyword

- FINANCE DATASET
 - Key Measures
 - Visual Measures
 - Closing Entry
 - Dates
 - Dimension Field Parameters
 - Dimension Tooltip
 - Dynamic Dates
 - GL Accounts
 - GL Document
 - GL Entries
 - Global Dimension 1
 - Global Dimension 2
 - Global Dimension 3
 - Global Dimension 4
 - Global Dimension 5
 - Global Dimension 6
 - Measure Parameter
 - Measure Parameter Bullet
 - Waterfall Account Categories
 - Waterfall Bridge Walk

Apply Close

Left sidebar navigation menu with icons for Home, Copilot, Create, Browse, Apps, Scorecards, OneLake catalog, Learn, Monitor, Real-Time, Workloads, Workspaces, Power Pack - Demo, FinancialBud get, DEV Utilisation, and Power BI.

Main content area showing a 'Prep data for AI' dialog box. The dialog has a title bar, a list of options (Get started, Simplify the data schema, Verified answers, Add AI instructions), a preview section for AI instructions, and 'Apply' and 'Close' buttons.

Prep data for AI

- Get started
- Simplify the data schema
- Verified answers
- Add AI instructions**

Add AI instructions (preview)

Provide context on important data fields, business goals, and industry terms to improve Copilot insights about this semantic model. [View some examples](#)

* When users ask questions like "what was total sales in the month of December 2024", use the "Actual" measure and filter using the "GL Accounts" and "Dates" dimension tables.

* The "GL Accounts" dimension table, "Category 1" field contains the information by which to filter when users are asking about "Sales" or "Costs" etc. "Sales" is equivalent to "Turnover" under "Category 1".

* When users ask to analyse data "by month" or "by year", use the Financial Period and Financial Year fields in the Dates table. "Month" is " Financial Period"

* When users ask questions about "Gross Profit" or "Gross Margin", or "Margin", use the "Gross Profit" measure

* When users ask to analyse data by "Department", this means by "Global Dimension 1"

* When users ask to analyse data by "Project", this means by "Global Dimension 2"

* When users ask to analyse data by "Sample", this means by "Global Dimension 3"

* When users ask to analyse data by "Customer Group", this means by "Global Dimension 4"

* When users ask to analyse data by "Area", this means by "Global Dimension 5"

* When users ask to analyse data by "Industry", this means by "Global Dimension 6"

1154/10000 characters

Apply Close

>	Global Dimension 4	Table
>	Global Dimension 5	Table
>	Global Dimension 6	Table

Filter by keyword

- Home
- Copilot
- Create
- Browse
- Apps
- Scorecards
- OneLake catalog
- Learn
- Monitor
- Real-Time
- Workloads
- Workspaces
- Power Pack - Demo
- FinancialBud get
- DEV Utilisation ...
- Power BI

Power Pack - Demo

+ New item New folder → Import Migrate

Choose from predesigned tasks
Select from one of Microsoft's predesigned tasks

Select a predesigned task

Power Pack - Demo > Other workloads

Name	Status	Git status	Type	Task
Finance Assistant	Synced	✓	Data agent	—

New item

Favorites All items

agent Filter

Data agent

Build a generative AI agent that understands your data and can answer complex questions in a variety of conversational interfaces.



Choose from predesigned task flows or add a task to build one

Select from one of Microsoft's predesigned task flows or add a task to start building one yourself.

Select a predesigned task flow Add a task

Import a task flow

Power Pack - Demo > Other workloads

Name	Status	Git status	Type	Task	Owner	Refreshed	Next refresh	Endorsement	Sensitivity	Included in app
Finance Assistant		Synced	Data agent	—	Reuben Barry	—	—	—	—	

Home

Agent instructions

Explorer

Data Setup

Add Data

FINANCE DATASET

Agent instructions

Guide the data agent to the best data sources for different types of questions by writing a detailed system prompt. [Learn more](#)

Objective

Act as a professional finance assistant that provides concise, accurate, and trustworthy financial insights. The agent should answer stakeholder questions relating to:

- Profit & Loss statements
- Balance Sheet items
- General Ledger-type enquiries
- Validated financial metrics sourced from the Finance Semantic Model

The agent supports meetings, analysis, and decision-making by returning reliable, consistent, and auditable financial values.

Data Sources

Use **only** the following data source when generating responses:

- Finance Semantic Model** (exclusive source)

The agent must not query or reference any other dataset, file, or external source.

Draft Share

Test the agent's responses

Finance Assistant

An agent for exploring approved Financial Reporting data for the business

What are the historical trends across all my data?

Analyze recent data for any outliers

Show me the details for a specific subcategory of data

Sample questions

Ask a question to test the data agent's response

Created with AI. Mistakes are possible. [Review terms](#)

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Agent instructions

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FINANCE DATASET

Agent instructions

Guide the data agent to the best data sources for your use case. Learn more

Objective

Act as a professional finance assistant that proactively identifies and answers stakeholder questions. The agent should answer stakeholder questions based on the data it has access to.

- Profit & Loss statements
- Balance Sheet items
- General Ledger-type enquiries
- Validated financial metrics sourced from approved data sources

The agent supports meetings, analysis, and decision-making.

Data Sources

Use **only** the following data source when generating responses:

- Finance Semantic Model** (exclusive source)

The agent must not query or reference any other data sources.

Grant people access

Finance Assistant

People who can ask this data agent questions

Enter a name or email address

Additional permissions

- Share
- Edit and view details
- View details

Notification Options

- Notify recipients by email

Add a message (optional)

Access to the data agent isn't the same as access to connected data sources. People you share the data agent with will only get responses based on the data they have permission to view.

Grant Back

Draft Share

Test the agent's responses

Finance Assistant

An agent for exploring approved Financial Reporting data for the business

What are the historical trends across all my data?

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Sample questions

Ask a question to test the data agent's response

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Home

Home Copilot Create Browse Apps Scorecards OneLake catalog Learn Monitor Workspaces Power Pack - Demo Finance Assistant FinancialBud get DEV Utilisation ...

Explorer

Data Setup

Add Data

FINANCE DATASET

Agent instructions

Agent instructions

Guide the data agent to the best data sources for different types of questions by writing a detailed system prompt. [Learn more](#)

Objective

Act as a professional financial analyst. The agent should answer questions about financial data.

- Profit & Loss statements
- Balance Sheet items
- General Ledger-type transactions
- Validated financial data

The agent supports meeting the following requirements:

Data Sources

Use **only** the following data sources:

- Finance Semantic Model**

The agent must not query any other data sources.

Draft Share

Test the agent's responses

Finance Assistant

An agent for exploring approved Financial Reporting data for the business

What are the historical trends across all my data?

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Sample questions

Ask a question to test the data agent's response

Created with AI. Mistakes are possible. [Review terms](#)

Publish data agent

The published version of your data agent will be updated with the latest changes. You can't undo this action.

Name
Finance Assistant

Description of purpose and capabilities

An agent for exploring approved Financial Reporting data for the business

Also publish to the Agent Store in Microsoft 365 Copilot On
Available immediately for personal use and sharing

Publish **Cancel**



Auto ▾



Month	Gross profit
January	£811
February	£3,645
March	£372
April	£13,367
May	£4,697
June	£1,890
July	£3,887
August	-£9,253
September	£696
October	£7,606
November	£6,761
December	£791,610

Total gross profit for 2025

• £826,088

Message Copilot



AI-generated content may be incorrect ©



The bottom line

Capture data at source
with the end goal in mind

- You can't outrun bad data

Adopt data modelling
best practices

- You might have got away with it in reporting, you won't with agents
- One source of reliable truth

Align to business
terminology

- Ensure end user adoption by designing for how they will interact with the agent

Thank You.

www.node4.co.uk

moreinfo@node4.co.uk



How did we do?

Let us know, we're all ears!
Use the app and share your
thoughts to help shape our
future events.

