

Copilot-Ready Semantic Model Checklist

Preparing a semantic model for AI comes down to a short list of properties on the semantic model itself.

PRIORITY **START HERE** Do these first. **NEXT** Do these after the Start here items. **WHEN YOU CAN** Do these when time allows.

START HERE

- ☐ **Get the structure right first.** Relate every table, describe what one row of each fact table means, and keep one active relationship per pair of tables. [From the post, section 1](#) SEMANTIC MODEL OWNER
- ☐ **Descriptions: the highest-leverage metadata fix.** Describe the measures first, then the columns people filter and group by, then the tables. Put the meaning in the first 200 characters of each description. [From the post, section 2](#) SEMANTIC MODEL OWNER
- ☐ **Curate the AI data schema.** In Prep data for AI, exclude key columns, helper tables, deprecated measures and technical scaffolding from the AI data schema. [From the post, section 5](#) SEMANTIC MODEL OWNER
- ☐ **Write AI Instructions.** In Prep data for AI, state what an AI agent cannot infer, such as your fiscal calendar, your canonical revenue measure and your own business terms. [From the post, section 6](#) SEMANTIC MODEL OWNER
- ☐ **Define the measures your business depends on.** Write a reviewed measure for every number your organization reports, divide totals for a ratio, and never add up a balance across dates. [From the post, section 7](#) SEMANTIC MODEL OWNER
- ☐ **Two safety checks before you widen AI agent access.** Protect columns that hold personal data with row-level or object-level security, and tie any date range a measure hard-codes to the latest date in your data. [From the post, section 13](#) SEMANTIC MODEL OWNER
- ☐ **Security roles.** Define a role for each group of people who should see only part of the data, such as the sales team of one region. [From Microsoft: Refresh, security and metadata](#) SEMANTIC MODEL OWNER

NEXT

- ☐ **Disambiguate names.** Rename or describe near-duplicate fields, such as two Date columns, or Total next to Total Amount. [From the post, section 3](#) SEMANTIC MODEL OWNER
- ☐ **Clean up the columns.** Fix the data types, use one spelling for each value, name each date column for its date, and keep keys complete and unique. [From the post, section 4](#) SEMANTIC MODEL OWNER
- ☐ **Defuse context-dependent measures.** Beside a measure that changes with the filters, add a sibling whose name states its grain, such as Avg Weekly Active Users. [From the post, section 8](#) SEMANTIC MODEL OWNER
- ☐ **Replace implicit measures with explicit ones.** Add an explicit measure for each numeric column people add up, and exclude the raw column from the AI data schema. [From the post, section 9](#) SEMANTIC MODEL OWNER
- ☐ **When an answer is wrong, find out why before you change the instructions.** Read the query Copilot generated before you change the AI Instructions, and rerun a list of real questions after every change. [From the post, section 14](#) WHOEVER TESTS COPILOT
- ☐ **Reassess, and prove that Copilot answers better.** Assess the semantic model again, and run the same benchmark before and after your changes. [From the post, section 15](#) SEMANTIC MODEL OR ROLLOUT OWNER
- ☐ **Relationship cardinality.** Set the cardinality of every relationship, and mark a role-playing relationship, such as a second date, as inactive. [From Microsoft: Semantic model structure](#) SEMANTIC MODEL OWNER
- ☐ **Logic you can explain.** Keep the DAX of each measure simple enough to explain in one sentence, and put that sentence in its description. [From Microsoft: Measures and KPIs](#) SEMANTIC MODEL OWNER
- ☐ **Names in full words.** Name each measure for what it calculates, in full words: Average Customer Rating rather than AvgRating. [From Microsoft: Measures and KPIs](#) SEMANTIC MODEL OWNER
- ☐ **Readable column names.** Replace codes such as ProdID or CustNo with names that need no lookup, such as Product Name or Customer Number. [From Microsoft: Columns and data quality](#) SEMANTIC MODEL OWNER
- ☐ **What a description opens with.** Open each description with the business meaning, then the unit, then what is left out of the number, such as returns or cancelled orders. [From Microsoft: DAX query considerations](#) SEMANTIC MODEL OWNER

Copilot-Ready Semantic Model Checklist

WHEN YOU CAN

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|--------------------------|---|----------------------|
| ☐ | Set field defaults and display folders. Set the default summarization, the format string and the display folder of your columns and measures. From the post, section 10 | SEMANTIC MODEL OWNER |
| ☐ | List what a calculation group contains. List each calculation item, and what it does, in the description of the calculation group column, inside the first 200 characters. From the post, section 11 | SEMANTIC MODEL OWNER |
| ☐ | Say how fresh the data is. End the description of each fact table with its refresh schedule, such as "Data refreshes daily at 6:00 AM UTC." From the post, section 12 | SEMANTIC MODEL OWNER |
| ☐ | Dimension tables. Move descriptive fields, such as product category or customer segment, into dimension tables that relate to your fact tables. From Microsoft: Semantic model structure | SEMANTIC MODEL OWNER |
| ☐ | Hierarchies. Add a hierarchy for each path people drill down, such as Year, Quarter, Month and Day, or Country, State and City. From Microsoft: Semantic model structure | SEMANTIC MODEL OWNER |
| ☐ | Two kinds of count. When a count of rows and a count of business events differ, write one measure for each, such as Order Line Count and Order Count. From Microsoft: Measures and KPIs | SEMANTIC MODEL OWNER |
| ☐ | Common time comparisons. Add measures for the comparisons people ask about most, such as year to date and month over month. From Microsoft: Measures and KPIs | SEMANTIC MODEL OWNER |
| ☐ | KPIs. Write a measure for each KPI your reports track often, such as return on investment or customer acquisition cost. From Microsoft: Measures and KPIs | SEMANTIC MODEL OWNER |
| ☐ | Fiscal periods. Add fiscal year and fiscal quarter columns to the date table, and state in its description the month your fiscal year starts. From Microsoft: Columns and data quality | SEMANTIC MODEL OWNER |
| ☐ | Documentation outside the semantic model. Keep a data dictionary, a diagram and a list of measures, and update them whenever the semantic model changes. From Microsoft: Refresh, security and metadata | SEMANTIC MODEL OWNER |

When Copilot's answers are wrong

WHOEVER TESTS COPILOT

These checks come from the Troubleshoot section of Microsoft's guidance. They are not rated, because each one fits a different symptom.

- **Copilot uses the wrong measure.** Check the measure names and descriptions, the AI data schema, and whether the AI Instructions say which measure is the default.
- **A total or a period looks wrong.** Compare the filters and the date column in the generated query with what you expected, then check the relationships and the aggregation.
- **A category is missing, or nothing comes back.** Check the source data, the last refresh, the category values, the period asked about and the person's permissions. An empty result does not mean zero.
- **The numbers are right, but the answer misleads.** Check the units, the format strings and the sort order, and whether Copilot says more than the data shows.
- **The answer is slow, or fails.** Read the generated query, check the performance of the semantic model, and compare the query with one you know is correct before you change the AI Instructions.
- **Changes in Prep data for AI do not appear.** Confirm that you changed the right semantic model, then close and reopen the Copilot pane. A change can take time to appear, and some need a deployment or a refresh.