

E10**Planning Sheet, Power Table, and Canvas Integration — FAQs**

This FAQ addresses common questions and clarifications that arise while working through the E10 — Planning Sheet, Power Table, and Canvas Integration exercise. It covers creating and configuring the Financial Plan Planning Sheet, building a Plan Simulation, embedding the Planning Sheet into the Intelligence Sheet canvas, and creating and embedding a writeback-enabled Power Table.

Part 1**Create a New Planning Sheet**

1. **What's the difference between dragging "Account Hierarchy" into Rows versus adding individual Account Level fields separately?**

Dragging Account Hierarchy pulls in the entire hierarchy in one action — Account Level 0 through Level 3 are added together as nested rows, which is faster than adding each level field individually and keeps the parent-child structure intact.

2. **What does the "Ragged Hierarchy" toggle under Format > Appearance actually control?**

The Ragged Hierarchy toggle hides empty or blank child members within a hierarchy and displays only the relevant parent rows. This helps reduce unnecessary gaps in the table, making the hierarchy easier to read.

3. **What's the difference between "Fit to Header" and "Fit to Content" under Auto Fit?**

Fit to Content, used in this exercise, widens each column to match its widest value so account names aren't cut off. Fit to Header would instead size the column to the header label, which can leave long values truncated.

4. **Is this Planning Sheet created inside the same Plan app used in the Intelligence Sheets exercise, or a new one?**

You can use same plan sheet used in the previous exercise.

5. **Do the Actuals, Plan, and Forecast measures need to be added in a specific order into Values, or does order not matter?**

Order doesn't affect the underlying data — Values are simply additional measure columns shown side by side. The order chosen (Actuals, Plan, Forecast) just determines the left-to-right column order on the sheet.

Part 2**Create a Plan Simulation**

6. **What's the difference between the "Plan (Simulation)" column and just editing the Plan column directly?**

The Simulation column is a separate, editable overlay created on top of the base Plan measure via Insert Column > Simulate — it lets you test scenario adjustments (sliders, percentages, fixed values) without altering the original Plan figures, which stay untouched underneath.

7. **What does the "Value Range" setting of 10 actually control?**

It sets how far the simulation slider can move a cell up or down from its base value (the "±" shown next to the field), bounding the maximum slider adjustment. Note if you type a value like the \$120M entry for Digital Marketing, can bypass the set range.

8. **Why does the Digital Marketing adjustment use a fixed value ("120m") while the other three use percentages?**

The simulation column accepts either format in any cell — a percentage adjusts the value relative to its current base, while typing a fixed number overrides the cell with that exact value. The exercise mixes both formats to show that either input method works.

9. **Do all four adjustments (Hardware Revenue, Subscription Revenue, Advertising & Promotion, Digital Marketing) need to be entered, or is a subset enough?**

All four are required — the exercise states these four are the minimum needed for the later embed steps to work correctly, though additional cells can also be adjusted beyond these four.

10. **What does "Variance formatting style: Positive" mean in the Simulation setup panel?**

The Variance Formatting Style setting controls how variance values are displayed when simulation changes are made using the slider.

11. **What's the difference between "Allow Input: In both read and edit mode" and restricting input to edit mode only?**

This means simulation can be changed in both reading and editing mode.

Part 3

Embed the Planning Sheet in the Intelligence Sheet

12. **Why is the Planning visualization option grayed out until a Planning Sheet exists in the workspace?**

The Planning visual embeds an existing Planning Sheet onto the Intelligence canvas, so at least one Planning Sheet needs to already exist in the Plan app for it to reference. It becomes active only once "Financial Plan" exists, which is why that sheet is created in Part 1 before this step.

13. **What happens if there's more than one Planning Sheet in the workspace when embedding?**

The sheet picker ("Select an Existing Planning Sheet") lists every Planning Sheet available, and you choose the correct one — the exercise notes explicitly that if multiple Planning Sheets exist, you should choose the correct one.

14. **Once the Planning Sheet is embedded, is it a live, editable copy or a static snapshot?**

It's live and editable — the exercise confirms that adjusting any cell value in the embedded Planning Sheet updates the Plan (Simulation) series in the KPI chart immediately, since it's the same underlying sheet rather than a snapshot.

15. **What's the difference between mapping Comparison 1 / Comparison 2 from the semantic model versus adding "Plan (Simulation)" via "From Sheets"?**

Comparison 1 and Comparison 2 pull directly from the semantic model's stored base measures (Plan, Actuals). From Sheets instead pulls a live field from the embedded Planning Sheet itself — Plan (Simulation) — which reflects whatever scenario values are currently entered on that sheet, including edits made after the KPI card was built.

16. **Why is Plan (Simulation) mapped to "Actual(s)" on the KPI card instead of to one of the Comparison fields?**

In this exercise, Plan (Simulation) is treated as the primary or baseline value against which other measures are compared. To support this comparison, it is mapped to the Actual(s) field on the KPI card.

17. **What does "Trellis Row: Account Level 3" do differently from just using Account Level 3 as a Category field?**

Same trellis behavior seen in the e8 — Trellis Row tiles the KPI card into a repeated small-multiple panel per Account Level 3 value, rather than filtering or grouping within a single card the way a Category mapping would.

Part 4 Create and Embed a Power Table

18. **What's the difference between a PowerTable Sheet and a Planning Sheet?**

A PowerTable Sheet is a writeback-enabled data grid connected directly to a semantic model, as stated at the start of Part 4, while a Planning Sheet is built around hierarchy-based planning (rows, columns, values, simulations). PowerTable is closer to a flat, editable table of underlying records — like the Sales Detail rows in this exercise — rather than a hierarchical plan.

19. **What's the difference between "Explore PowerTable" and "Create a New App" on the Welcome screen?**

Explore PowerTable uses built-in sample data with no connection setup required, useful for trying the feature. Create a New App — the option used in this exercise — requires connectivity to a Fabric SQL Database, since it builds a real, writeback-enabled app against your own data.

20. **Why does creating a PowerTable require a separate Fabric SQL Database connection, when the Intelligence Sheet and Planning Sheet only needed the semantic model connection?**

The PowerTable is writeback-enabled, so it needs a database to actually store the app's metadata and any written-back values. The semantic model connection alone is read-only and can't persist edits, which is why Part 4 adds a Fabric SQL Database connection alongside the semantic model connection.

21. **What's the difference between "Existing Table" and "New Table" when creating the Sales Detail table?**

New Table, used here, imports data and creates a brand-new table in the Fabric SQL database. Existing Table would instead point to data that already exists in the database rather than creating a fresh one.

22. **What's the difference between "Upload File," "Connect To Semantic Model," and "Enter Data Manually" under Import Data?**

Connect To Semantic Model, used in this exercise, pulls fields and measures directly from a published semantic model (Enterprise Dataset ▲). Upload File would instead import from a file such as Excel or CSV, and Enter Data Manually lets you type rows directly into the table without any external source.

23. **Why does Product Name get set as the Primary Key instead of Category?**

Product Name uniquely identifies each row in the Sales Detail table, while Category repeats across many rows — several products share "SaaS," "Hardware," or "Services." A primary key needs a unique value per row, which is why Product Name is selected rather than Category.

24. **What does the Filter tab in Configure Semantic Model actually restrict — the whole semantic model, or just this table's data?**

Just this table's data — the Filter tab (Data Mapping > Filter) restricts which field values are imported into the Sales Detail PowerTable specifically (e.g., limiting Category to Hardware, SaaS, and Services), without changing the underlying semantic model itself.

25. **Can the Power Table and the Planning Sheet be embedded on the same Intelligence Sheet canvas at the same time?**

Yes — the exercise embeds both.