

E10
Planning Sheet, Power Table, and Canvas Integration

12 min

In the previous exercise you built a P&L in the Intelligence Sheet. In this exercise you will create a Planning Sheet with a simulation, embed it into the Intelligence Sheet canvas, then create a Power Table and embed that alongside it.

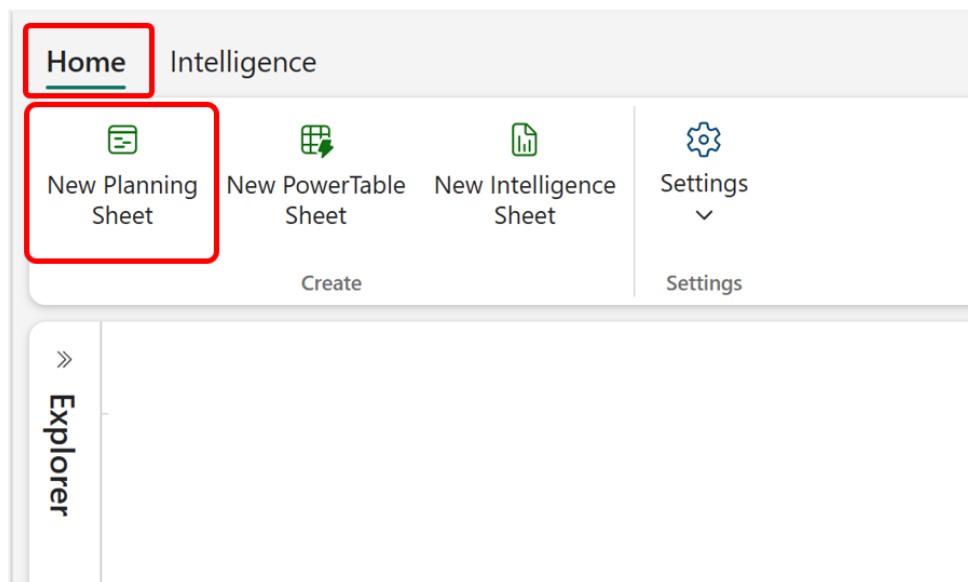
Part 1
Create a New Planning Sheet

~3 min

Create a Planning Sheet named “Financial Plan”, connect the account hierarchy and measures, and configure the display settings.

1. Create a New Planning Sheet

- i. Go to the **Home Tab** and select **New Planning Sheet**.



- ii. When prompted, name the Planning Sheet “**Financial Plan**” and click **Create**.

2. Configure the Data

- iii. Click the **Fields** tab on the right panel.
- iv. Expand **[Dim] Account** from the Data tab and drag **Account Hierarchy** into the **Rows** area.
- v. Drag and drop the following measures into **Values**:
 - a. Measures > Financial > Base Measures > **Actuals**
 - b. Measures > Financial > Base Measures > **Plan**
 - c. Measures > Financial > Base Measures > **Forecast**

Fields

Rows

Account Hiera...
Account Level 0
Account Level 1
Account Level 2
Account Level 3

+ Add Rows

Columns

Add data fields here

+ Add Columns

Values

Actuals

Plan

Forecast

Data

Search

Semantic Model

Measure

Financial

Base Measures

☒ Actuals
☒ Forecast
☒ Plan
☐ PY

Expense

Financial Income

Financial Metrics

Invoice Line Metr...

Margin %

Profit Metrics

Operational

Verification Measures

Yearly Measures

[Dim] Account

Account Hierarchy

Account Level 0

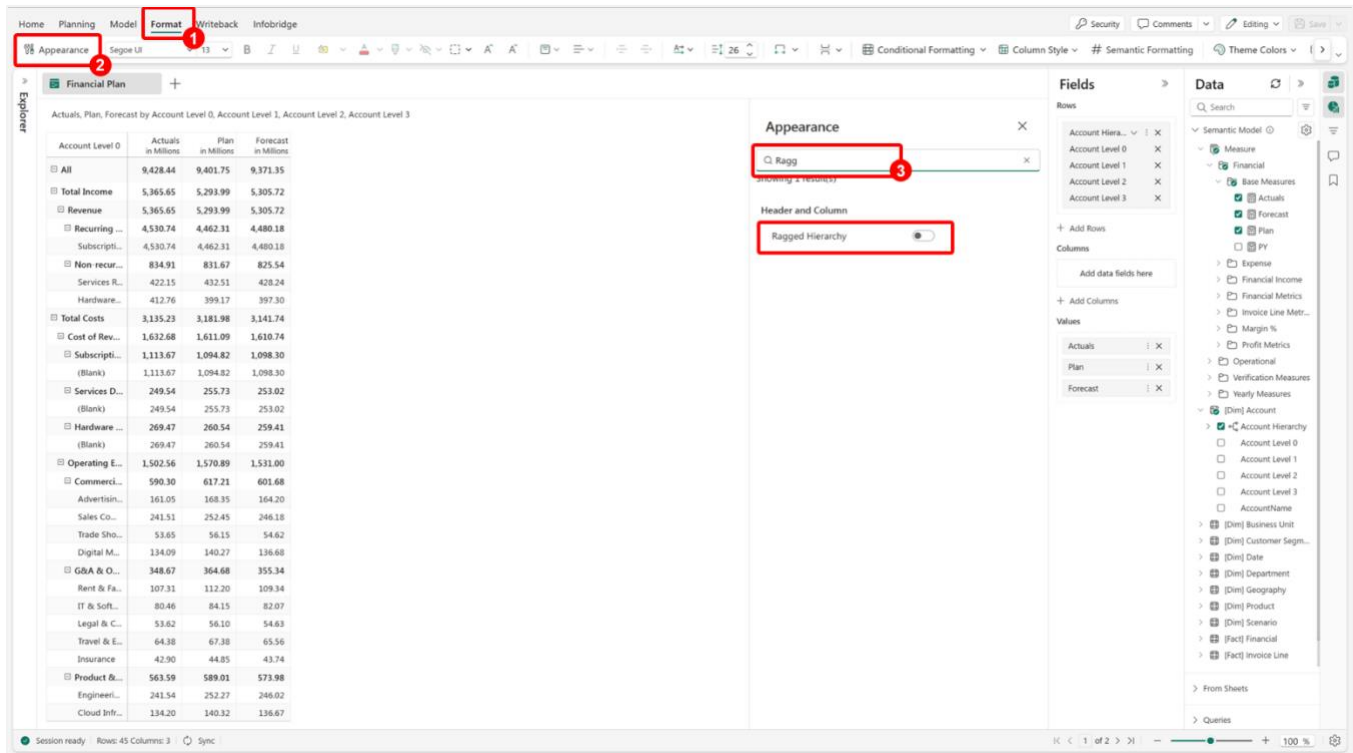
Account Level 1

Account Level 2

Account Level 3

AccountName

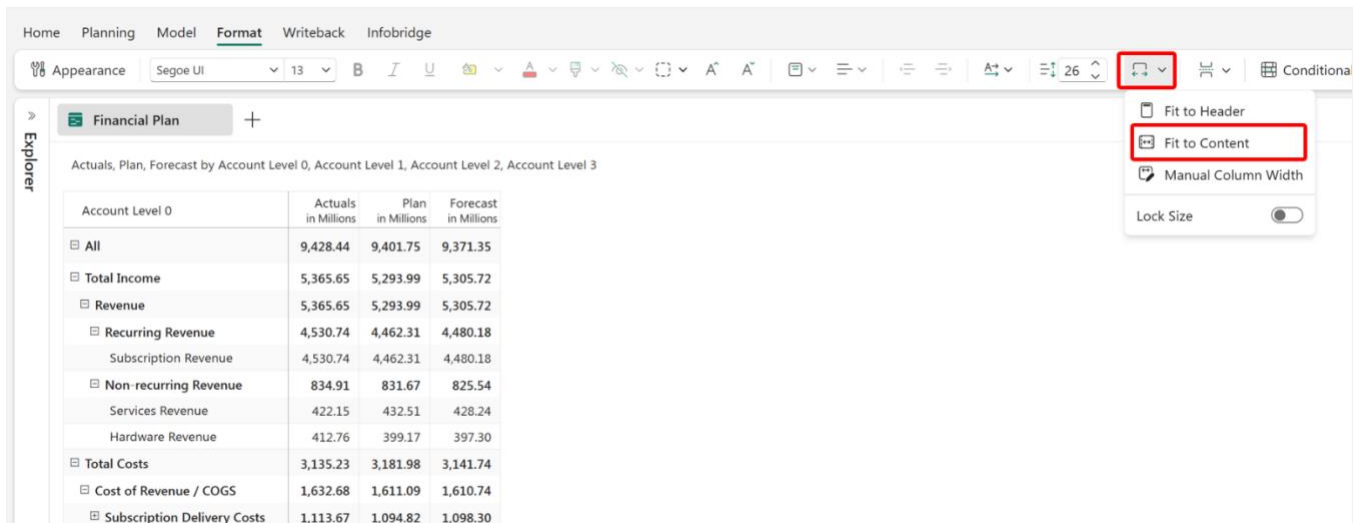
vi. Go to **Format > Appearance**. Search for **Ragged** and turn on the toggle.



The screenshot shows the Fabric Plan application with the 'Format' tab selected. The 'Appearance' pane is open, and the 'Ragged Hierarchy' toggle is highlighted with a red box and a red circle. The main table displays financial data with columns for 'Account Level 0', 'Actuals in Millions', 'Plan in Millions', and 'Forecast in Millions'.

Account Level 0	Actuals in Millions	Plan in Millions	Forecast in Millions
All	9,428.44	9,401.75	9,371.35
Total Income	5,365.65	5,293.99	5,305.72
Revenue	5,365.65	5,293.99	5,305.72
Recurring Revenue	4,530.74	4,462.31	4,480.18
Subscription Revenue	4,530.74	4,462.31	4,480.18
Non-recurring Revenue	834.91	831.67	825.54
Services Revenue	422.15	432.51	428.24
Hardware Revenue	412.76	399.17	397.30
Total Costs	3,135.23	3,181.98	3,141.74
Cost of Revenue / COGS	1,632.68	1,611.09	1,610.74
Subscription Delivery Costs	1,113.67	1,094.82	1,098.30

vii. Select **Auto Fit > Fit to Content** to widen the column to best fit.



The screenshot shows the Fabric Plan application with the 'Format' tab selected. The 'Appearance' pane is open, and the 'Fit to Content' option is highlighted with a red box. The main table displays financial data with columns for 'Account Level 0', 'Actuals in Millions', 'Plan in Millions', and 'Forecast in Millions'.

Account Level 0	Actuals in Millions	Plan in Millions	Forecast in Millions
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Cost of Revenue / COGS	1,632.68	1,611.09	1,610.74
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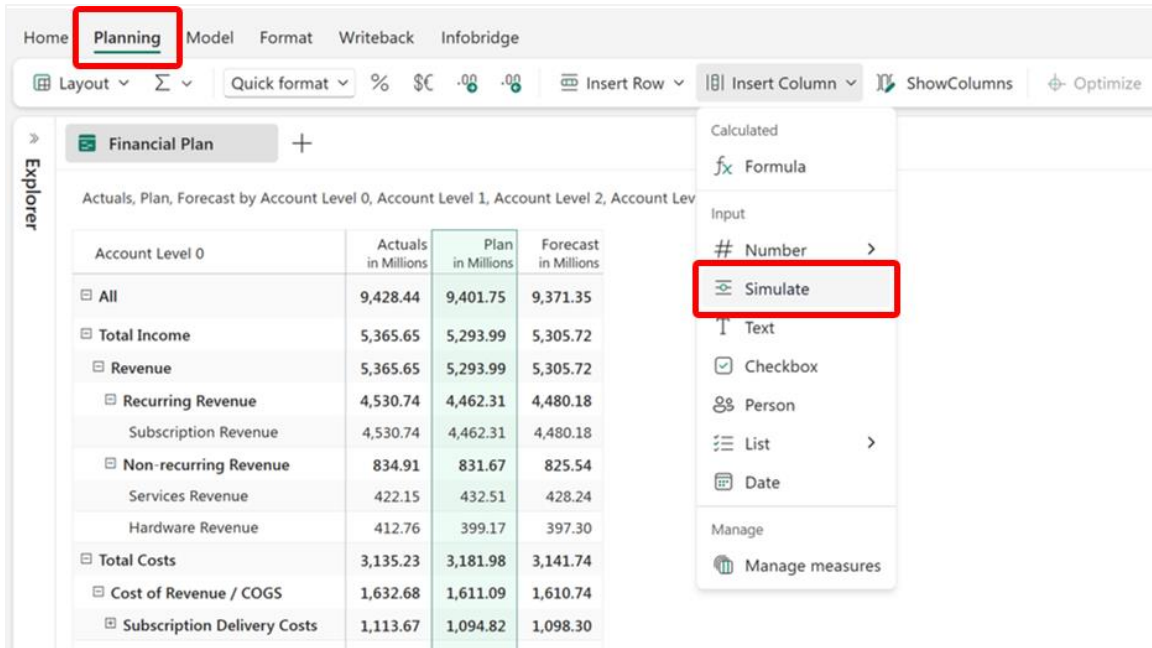
Part 2 Create a Plan Simulation

~2 min

Insert a Simulate column on the Plan measure, set a value range, and enter four scenario adjustments.

3. Insert a Simulation Column

- viii. Click the **Plan** column header to highlight it.
- ix. From the **Planning ribbon**, select **Insert Column > Simulate**. When prompted to save, confirm and proceed.



The screenshot shows the Fabric Plan interface. The **Planning** ribbon is active, and the **Insert Column > Simulate** menu path is highlighted. The main table displays financial data for Account Level 0, with columns for Actuals, Plan, and Forecast in Millions.

Account Level 0	Actuals in Millions	Plan in Millions	Forecast in Millions
All	9,428.44	9,401.75	9,371.35
Total Income	5,365.65	5,293.99	5,305.72
Revenue	5,365.65	5,293.99	5,305.72
Recurring Revenue	4,530.74	4,462.31	4,480.18
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Cost of Revenue / COGS	1,632.68	1,611.09	1,610.74
Subscription Delivery Costs	1,113.67	1,094.82	1,098.30

- x. A side panel opens. Keep the **Simulate on** field set to **Plan** (default). Set **Value Range** to **10** and click **Create**.
- xi. A new **Plan (Simulation)** column appears on the sheet.

<

Simulation

×

Title *

Plan (Simulation)

Simulation based on *

Plan

💡

You can select any cell in this column and apply simulation to it by using slider and entering direct value or formula like +10%, +10k etc.

Variance formatting style

Positive

☒ Show Slider

Value Range

±

10

▲

▼

Simulation Value

Left

Allow Input

In both read and edit mode

^

Description

Description

Briefly describe the formula

Cancel

Create

4. Enter the Planning Simulation

- xii. Select individual cells in the **Plan (Simulation)** column and apply the following adjustments. Adjustments can be made by moving the slider or by typing the value directly in the cell.

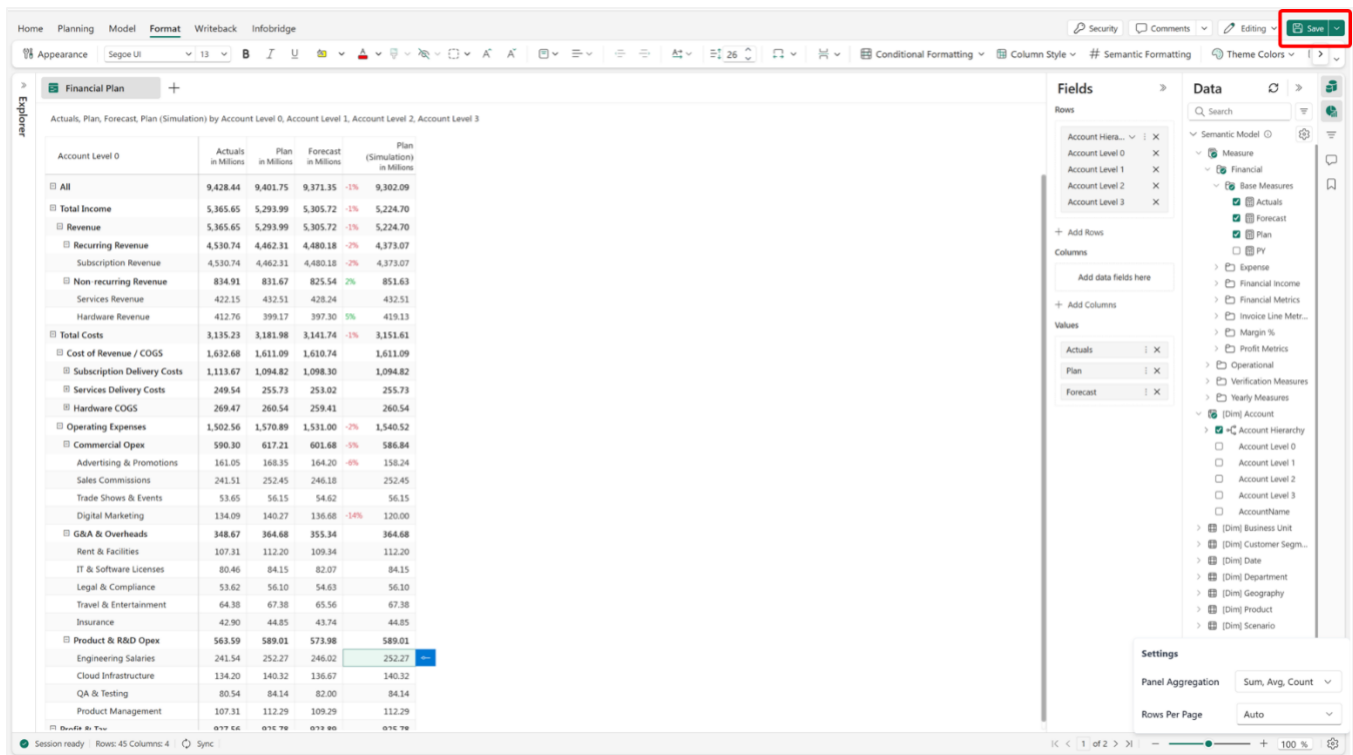
...	Hardware Revenue	412.76	399.17	397.30	399.17	
☰	Hardware Revenue	412.76	399.17	397.30	5% 419.13	
	Digital Marketing	134.09	140.27	136.68	= 120m	

xiii. Configure following

Account	Adjustment	How to enter
Hardware Revenue	+5%	Select cell > type percentage increase or use the simulation slider
Subscription Revenue	-2%	Select cell > type percentage decrease or use the simulation slider
Advertising & Promotion	-6%	Select cell > type percentage decrease or use the simulation slider
Digital Marketing	\$120M	Select cell > type 120m and press Enter

xiv. Once all four adjustments are entered, the **Plan (Simulation)** column reflects the updated scenario. You can continue adjusting other cells — these four are the minimum required for the embed steps to work correctly.

xv. Click **Save** after all adjustments.



The screenshot displays the Fabric Plan application interface. The main window shows a financial plan table with columns for Actuals, Plan, Forecast, and Plan (Simulation). The 'Save' button in the top right corner is highlighted with a red box. The table includes various accounts such as Total Income, Revenue, Total Costs, and Operating Expenses, with values in millions. The 'Plan (Simulation)' column shows the updated scenario after adjustments.

Part 3

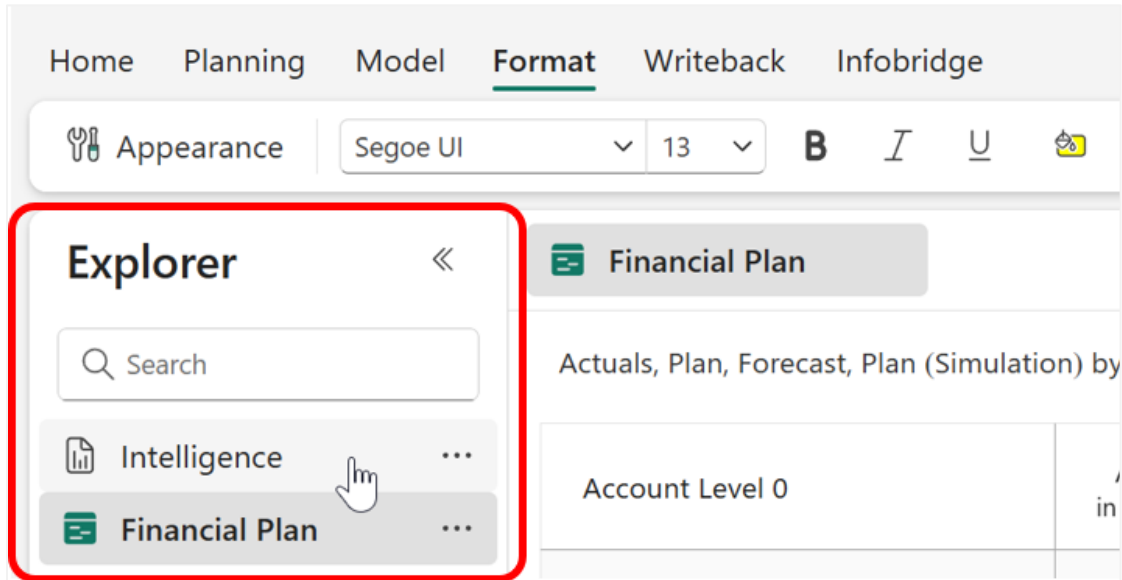
Embed the Planning Sheet in the Intelligence Sheet

~2 min

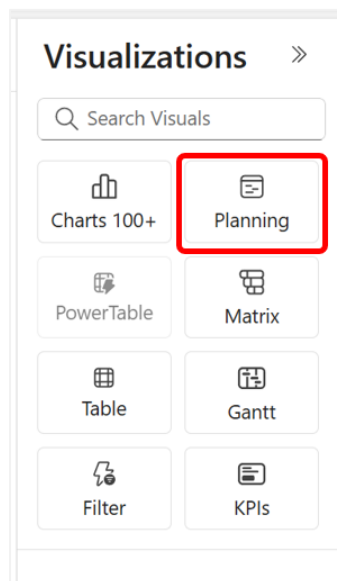
Embedding the Planning Sheet inside the Intelligence Sheet keeps both views on the same canvas — planners edit the table and the charts update beside it.

5. Embed the Planning Sheet

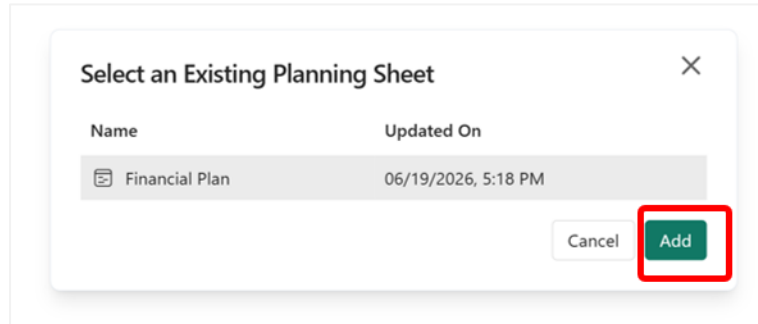
xvi. Click your **Intelligence Sheet** in the explorer tab to switch back to it.



xvii. From the **Visualization tab**, click **Planning**. It is now active because a Planning Sheet exists in the workspace.



- xviii. When prompted, select **Financial Plan** from the sheet picker. If multiple Planning Sheets exist, choose the correct one. Click **Add**.



- xix. The Planning Sheet is now embedded in the Intelligence Sheet canvas. Resize and reposition it alongside your existing visuals as needed.

6. Add a KPI Linked to Both the Semantic Model and the Planning Sheet

- xx. From the **Visualization tab**, select **KPI Cards**. Click and drag to place it on the canvas.
- xxi. In the **Field well**, map the following fields from the **semantic model**:
- xxii. Comparison 1: Measures > Financial > Base Measures > **Plan**
- xxiii. Comparison 2: Measures > Financial > Base Measures > **Actuals**
- xxiv. Trellis Row: [Dim] Account > **Account Level 3**
- xxv. Now add fields from the embedded **Planning Sheet**. In the field well, drag the measure from the **From Sheets** to see fields from embedded sheets on the canvas.
- xxvi. From the **From Sheets** source, add the following to **Actuals**:
- xxvii. **Plan (Simulation)**

Visualizations »

< KPIs

Category

Add data fields here

Actual(s) *

Sum of Plan (Sim... : X

Comparison 1 (vs Actuals)

Plan : X

Comparison 2 (vs Actuals)

Actuals : X

Comparison 3 (vs Actuals)

Add data fields here

Trellis Row

Account Level 3 : X

Trellis Column

Add data fields here

Data

Search

▼ Semantic Model ⓘ

▼ Measure

▼ Financial

▼ Base Measures

☒ Actuals

☐ Forecast

☒ Plan

☐ PY

> Expense

> Financial Income

> Financial Metrics

> Invoice Line Metr...

> Margin %

> Profit Metrics

> Operational

> Verification Measures

> Yearly Measures

▼ From Sheets

▼ Financial Plan

☒ # Plan (Simulation)

- xxviii. The chart now displays **Plan (Simulation)** from the Planning Sheet and comparison alongside Actuals and Plan
- xxix. Test the live link: adjust any cell value in the embedded Planning Sheet. The **Plan (Simulation)** series in the chart updates immediately to reflect the new value.

Actuals, Plan, Forecast, Plan (Simulation) by Account Level 0, Account Level 1, Account Level 2, Account Level 3

Account Level 0	Actuals in Millions	Plan in Millions	Forecast in Millions	Plan (Simulation) in Millions
All	9,428.44	9,401.75	9,371.35	9,345.34
Total Income	5,365.65	5,293.99	5,305.72	5,267.95
Revenue	5,365.65	5,293.99	5,305.72	5,267.95
Recurring Revenue	4,530.74	4,462.31	4,480.18	4,373.07
Subscription Revenue	4,530.74	4,462.31	4,480.18	4,373.07
Non-recurring Revenue	834.91	831.67	825.54	894.88
Services Revenue	422.15	432.51	425.54	475.76
Hardware Revenue	412.76	399.17	397.30	419.13
Total Costs	3,135.23	3,181.98	3,141.74	3,151.61
Cost of Revenue / COGS	1,632.68	1,611.09	1,610.74	1,611.09
Subscription Delivery Costs	1,113.67	1,094.82	1,098.30	1,094.82
Services Delivery Costs	249.54	255.73	253.02	255.73
Hardware COGS	269.47	260.54	259.41	260.54
Operating Expenses	1,502.56	1,570.89	1,531.00	1,540.52
Commercial Opex	590.30	617.21	601.68	586.84
Advertising & Promotions	161.05	168.35	164.20	158.24
Sales Commissions	241.51	252.45	246.18	252.45
Trade Shows & Events	53.65	56.15	54.62	56.15
Digital Marketing	134.09	140.27	136.68	120.00
G&A & Overheads	348.67	364.68	355.34	364.68
Rent & Facilities	107.31	112.20	109.34	112.20
IT & Software Licenses	80.46	84.15	82.07	84.15
Legal & Compliance	53.62	56.10	54.63	56.10
Travel & Entertainment	64.38	67.38	65.56	67.38
Insurance	42.90	44.85	43.74	44.85
Product & R&D Opex	563.59	589.01	573.98	589.01
Engineering Salaries	241.54	252.27	246.02	252.27
Cloud Infrastructure	134.20	140.32	136.67	140.32

Services Revenue
475.8m
Δ1 10.0% ↑
Δ2 12.7% ↑

Rows: 45 Columns: 4

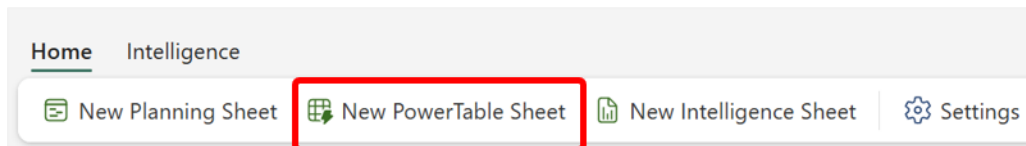
Part 4 Create and Embed a Power Table

~5 min

A PowerTable Sheet is a writeback-enabled data grid connected directly to a semantic model. You will create a new PowerTable Sheet, connect it to the semantic model, map and configure the columns, then embed it into the Intelligence Sheet canvas alongside the Planning Sheet.

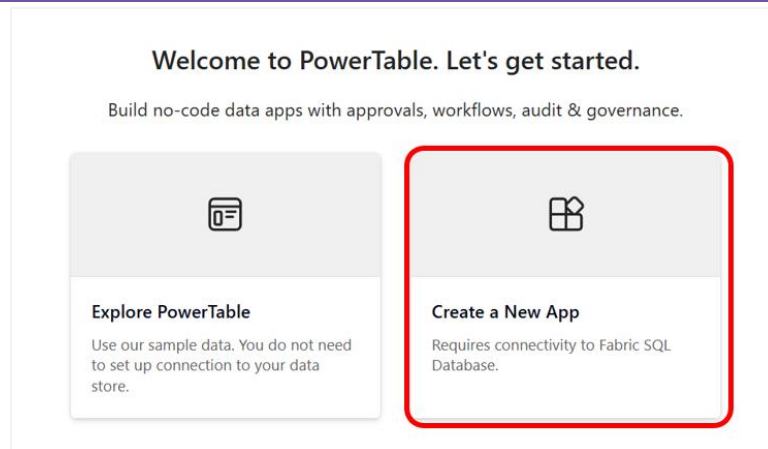
7. Creating a New Power Table Sheet

xxx. In your plan, select **New PowerTable Sheet** or select the **PowerTable** icon on the landing page.



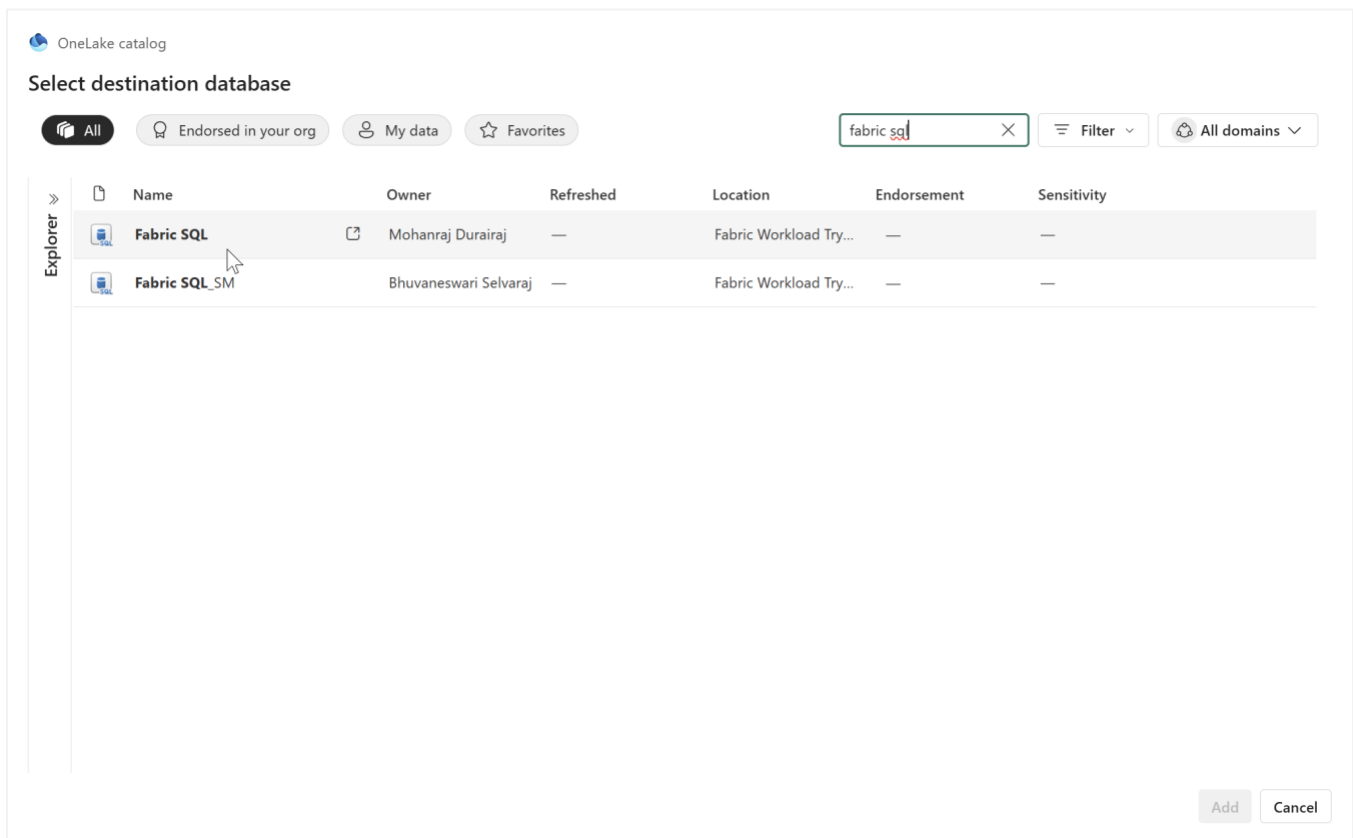
xxxi. Enter the name “**Sales Detail**” and click **Create**.

xxxii. Select **Create a New App**.



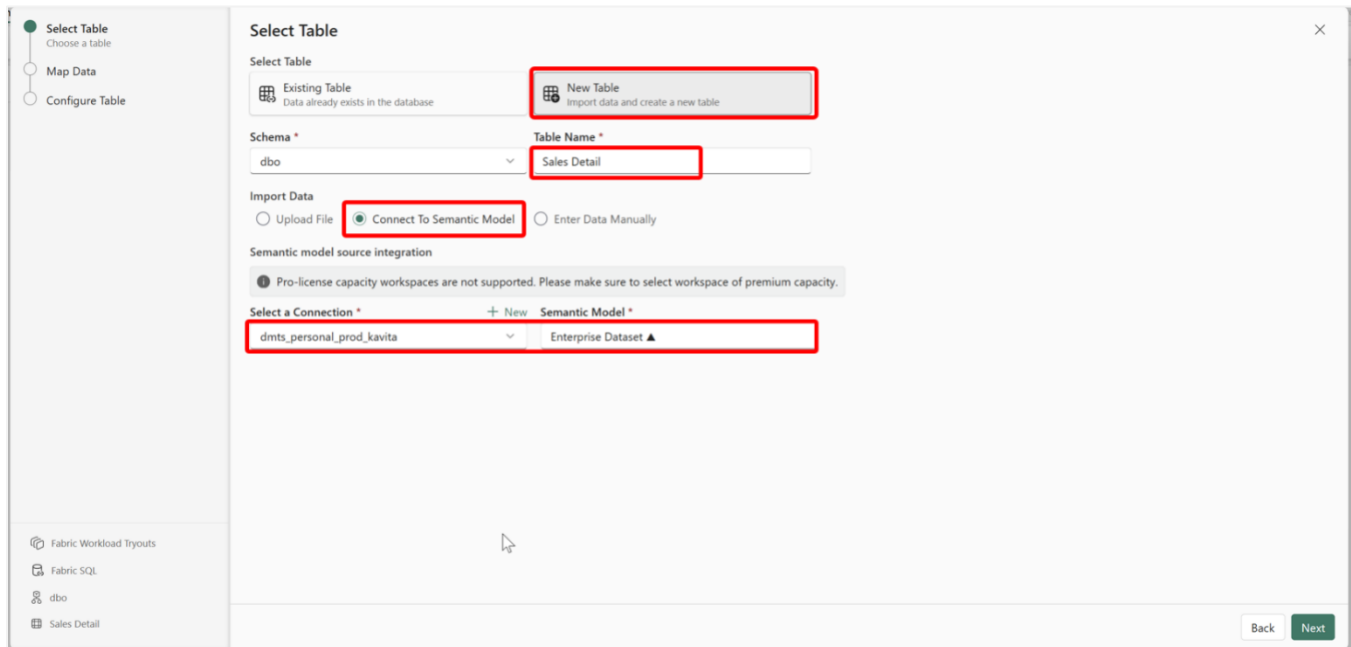
8. Connect to the Fabric SQL Database

- xxxiii. Under **Select a Connection**, choose your **Fabric SQL** connection from the list. Create a new connection if one does not exist.
- xxxiv. Under **Database Name**, select the Fabric SQL database where app metadata will be stored, then click **Add**.
- xxxv. Click **Connect**.



9. Create the Table and Connect to the Semantic Model

- xxxvi. Click **New Table** and select **New Table** (Import data and create a new table).
- xxxvii. Choose a **Schema** and enter “**Sales Detail**” as the **Table Name**.
- xxxviii. Under **Import Data**, select **Connect To Semantic Model**.
- xxxix. Select your **DMTS Connection** and choose **Enterprise Dataset ▲** as the **Semantic Model**. Click **Next**.

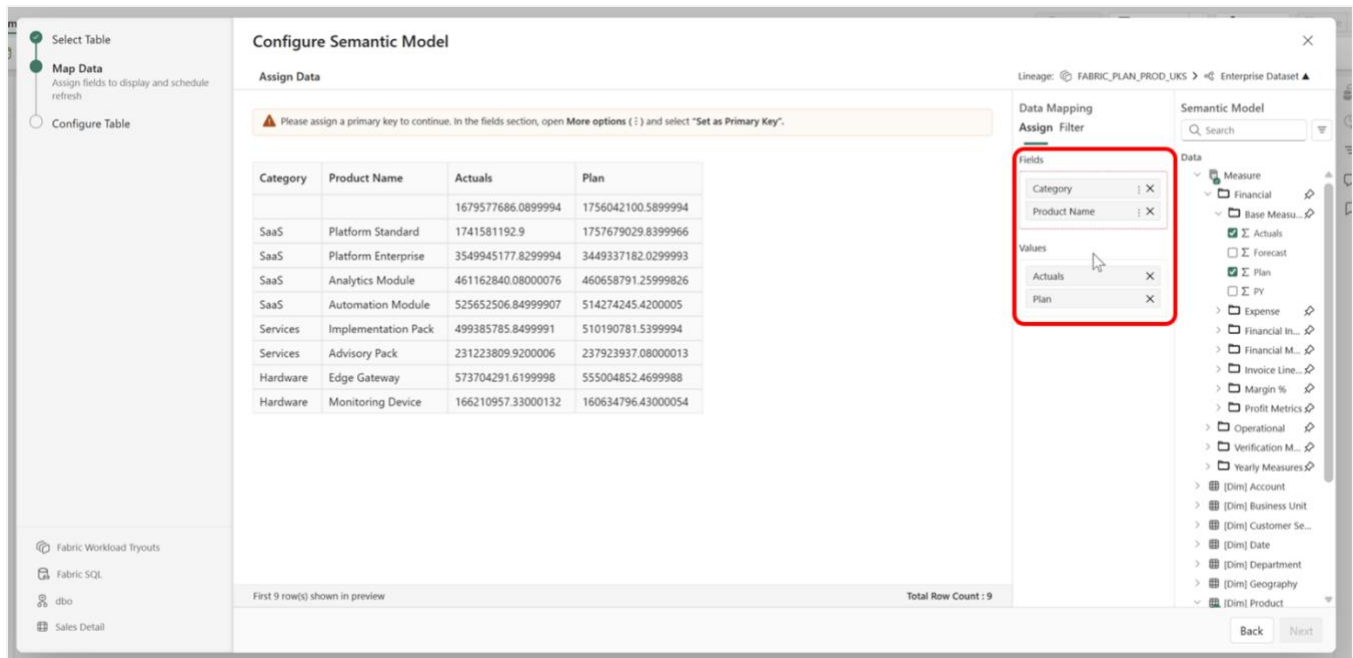


The screenshot shows the 'Select Table' dialog with the following configuration:

- Select Table:** 'New Table' (Import data and create a new table) is selected.
- Schema:** 'dbo' is selected.
- Table Name:** 'Sales Detail' is entered.
- Import Data:** 'Connect To Semantic Model' is selected.
- Semantic model source integration:** 'dmts_personal_prod_kavita' is selected as the connection, and 'Enterprise Dataset ▲' is selected as the semantic model.

10. Map Data and Set Primary Key

- xl. In the **Configure Semantic Model** panel, use the **Semantic Model** tree on the right to select fields. Check the following and drag them into the **Fields** area:
- xli. [Dim] Product > **Category**
- xlii. [Dim] Product > **Product Name**
- xlili. Measures > Financial > Base Measures > **Actuals**
- xliv. Measures > Financial > Base Measures > **Plan**



Configure Semantic Model

Assign Data

Please assign a primary key to continue. In the fields section, open **More options** (⋮) and select **Set as Primary Key**.

Category	Product Name	Actuals	Plan
		1679577686.0899994	1756042100.5899994
SaaS	Platform Standard	1741581192.9	1757679029.8399966
SaaS	Platform Enterprise	3549945177.8299994	3449337182.0299993
SaaS	Analytics Module	461162840.08000076	460658791.25999826
SaaS	Automation Module	525652506.84999907	514274245.4200005
Services	Implementation Pack	499385785.8499991	510190781.5399994
Services	Advisory Pack	231223809.9200006	237923937.08000013
Hardware	Edge Gateway	573704291.6199998	555004852.4699988
Hardware	Monitoring Device	166210957.33000132	160634796.43000054

First 9 row(s) shown in preview Total Row Count : 9

Data Mapping

Assign Filter

Fields

- Category
- Product Name

Values

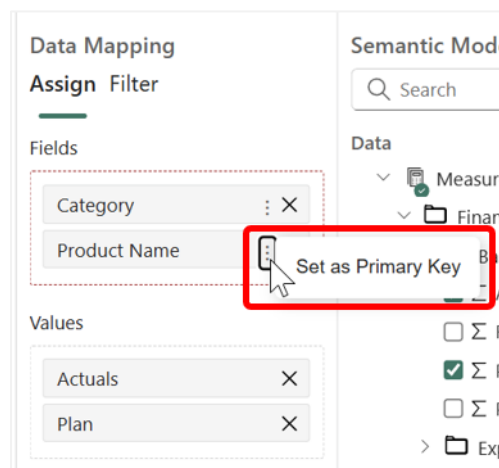
- Actuals
- Plan

Semantic Model

Lineage: FABRIC_PLAN_PROD_UKS > Enterprise Dataset

Back Next

- xlv. Set the primary key by clicking the three-dot menu next to **Product Name** in the Fields list and selecting **Set as Primary Key**.



Data Mapping

Assign Filter

Fields

- Category
- Product Name

Values

- Actuals
- Plan

Semantic Model

Search

Data

- Measure
- Financial

Set as Primary Key

- xlvi. If needed, switch to the **Filter** tab to restrict which field values are imported. Click **Next**.

Data Mapping

Assign **Filter**

Filters on this visual

Category

is Hardware, SaaS or Services

Filter type

Basic filtering

Search

☐ Select all

☐ (Blank)

☒ Hardware

☒ SaaS

☒ Services

Actuals

is (All)

Plan

is (All)

Add data fields here

11. Configure Columns

- xlvi. Review the auto-detected column settings. Confirm or update the **data type**, **input type**, and **display name** for each column as needed.
- xlvi. Confirm the primary key is selected. Enter default values where required.
- xlix. Click **Finish**. The table is created with the configured columns and values.

- Select Table
- Map Data
- Configure Table**
Customize data table

Fabric Workload Tryouts

Fabric SQL

dbo

Sales Detail

Configure Table ✕

Columns (4) + Add Column

Column *	Data Type *	Input Type *	Primary Key *	Mandatory	Identity Column	Length	Time Zone Adjustment	Default Value	Display Name	Action
Product Name	VARCHAR	Text	☒	☒	☐	255		Enter Value	Enter Value	
Category	VARCHAR	Text	☐	☐	☐	255		Enter Value	Enter Value	
Actuals	Float	Decimal	☐	☐	☐	Enter		Enter Value	Enter Value	
Plan	Float	Decimal	☐	☐	☐	Enter		Enter Value	Enter Value	

Enable support for Slowly Changing Dimensions (SCD) ☐

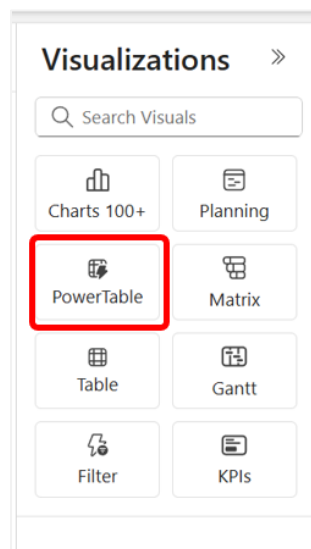
Please note SCD configurations cannot be modified later. [Learn more](#)

Back Finish

I. Click **Save** to save the PowerTable Sheet.

12. Embed the Power Table in the Intelligence Sheet

- li. Click your **Intelligence Sheet** in the explorer tab to switch back to it.
- lii. From the **Visualization tab**, click **Power Tables**. It is now active because a PowerTable Sheet exists in the workspace.



liii. When prompted, select **Sales Detail** from the picker and click **Add**.

Select an Existing PowerTable
✕

Select Sheet

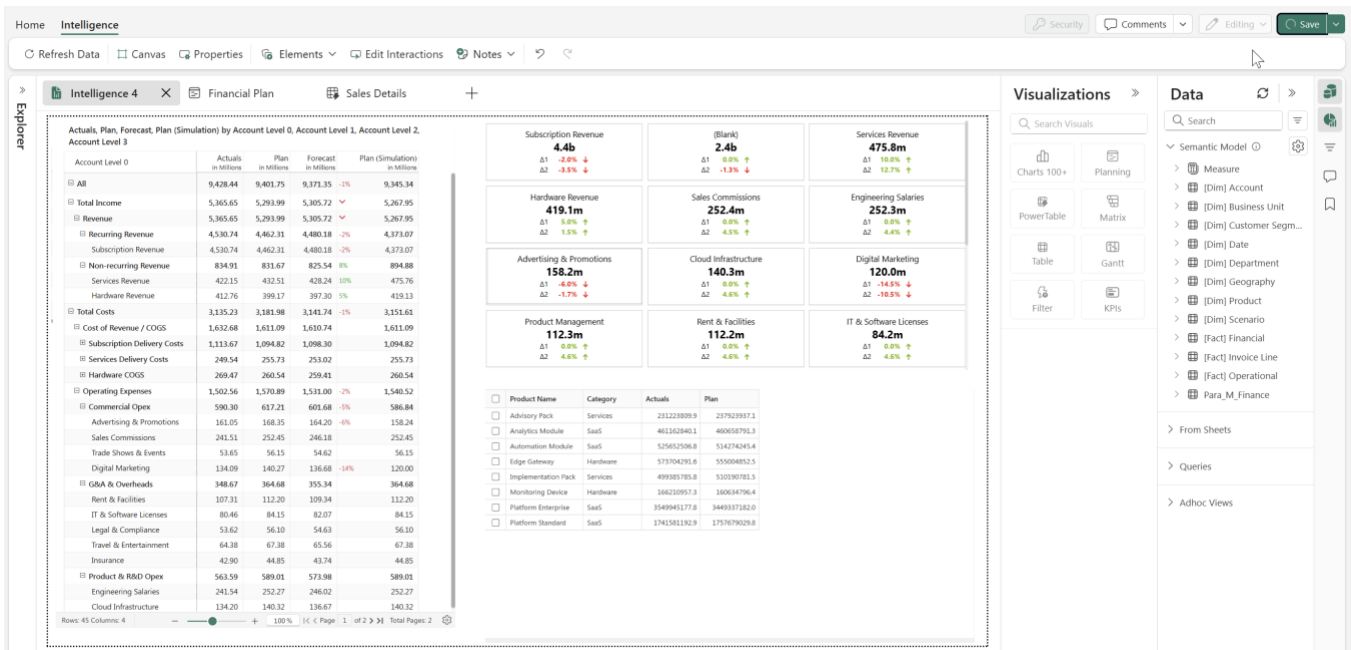
 **Sales Details**
Last Updated 06/24/2026, 10:42 AM

Related Forms

No forms configured

Cancel
Add

- liv. Resize and position the Power Table on the canvas alongside the embedded Planning Sheet so planners can see both the simulation and the product-level detail in one view.



The screenshot shows the Fabric Plan application interface. The top navigation bar includes 'Home', 'Intelligence', and 'Security'. Below this, there's a 'Canvas' tab with 'Financial Plan' selected. The main area displays a 'Financial Plan' sheet with a table of financial data. The table has columns for 'Actuals', 'Plan', and 'Forecast'. The data is organized by 'Account Level 0' and 'Account Level 1'. The table includes various revenue and cost categories, such as 'Subscription Revenue', 'Hardware Revenue', 'Advertising & Promotions', 'Product Management', 'Rent & Facilities', and 'IT & Software Licenses'. To the right of the table, there's a 'PowerTable' visualization showing a grid of data points with color-coded indicators (green for positive, red for negative). The bottom right corner shows a 'Visualizations' panel with options like 'Charts', 'PowerTable', 'Table', and 'Filter'.

Outcomes

- ✓ Created a Planning Sheet named “Financial Plan” with Actuals, Plan, and Forecast measures mapped to the Account Hierarchy.

- ✓ Added an editable Plan (Simulation) column with a 10 value range and entered four adjustments: Hardware Revenue +5%, Subscription Revenue -2%, Digital Marketing \$120M, Advertising & Promotion -6%.
- ✓ Embedded the Financial Plan sheet inside the Intelligence Sheet canvas. Added a KPI using Actuals from the semantic model and Plan (Simulation) from the embedded Planning Sheet via From Sheets — changes to simulation values update the chart live.
- ✓ Created a PowerTable Sheet named “Sales Detail” connected to the Enterprise Dataset semantic model, mapped Product Category, Product Name, Actuals, and Plan fields, set Product Name as the primary key, and configured columns.
- ✓ Embedded the Sales Detail Power Table in the Intelligence Sheet alongside the Planning Sheet.