Fabric Plan

## E6 Getting Started with PowerTable

This FAQ addresses common questions and clarifications that arise while working through the E6 — Getting Started with PowerTable exercise. It covers creating and connecting the Fabric Plan Plan Item for PowerTable, creating and setting up different sheets, and data management with PowerTable,

## Part 1 Set Up the Training Environment

1. **What permissions do I need in the workspace to create the SQL database and the Plan item?**
   To be able to create a new Fabric Plan Item, you will need a Contributor role in the workspace at the bare minimum.

2. **Why does the exercise create a Fabric SQL database first instead of the Plan item supplying its own storage?**
   Unlike the Planning or the Intelligence sheets, PowerTable sheets in Fabric Plan connect directly to a Fabric SQL database instead of a semantic model – all data is read from and written back to the database itself. Even when starting off with a CSV or an Excel file, the data first needs to be imported into a Fabric SQL database. This is why we create it first.

3. **After creating the database I see two items with the same name in the workspace — is that an error?**
   No. Creating a Fabric SQL database also creates a companion SQL analytics endpoint item, which is why step 1.IV shows fabric_plan_training listed twice with different types. E6 does not have you configure or open the analytics endpoint — all of our exercises for PowerTable will have you working with the data in the database directly from within the PowerTable sheets.

4. **Do the names I choose for the database and the Plan item matter for later steps?**
   The database name matters because you select it by name in the Select Fabric SQL Connection dialog every time you create a sheet. The Plan item name is a label only. If you deviate from fabric_plan_training and Asset Management, substitute your own names consistently when the guide refers to those steps.

## Part 2 Create the PowerTable sheets

5. **What is the difference between Explore PowerTable and Create a New App on the welcome screen?**

   **Explore PowerTable** loads sample data into a Fabric SQL database and allows you to explore pre-built PowerTable sheets with multiple sheets that are already configured. **Create a New App** lets you choose the data source yourself and work with your own data instead of sample data – you can get the data in from a spreadsheet or connect to an existing database table. The sheet is not pre-configured and allows you to set up different items from scratch.

6. **Why does the Set up connection banner appear only once, and what does it actually enable?**

   The setup connection steps run one time for each Fabric Plan item, not once per sheet. This connection ties the Plan item to the app/system database and gives users holding the Viewer workspace role the ability to use the Plan item. Dismissing the banner without completing it leaves that Viewer capability unconfigured.

7. **What does Authentication kind “Organizational account” mean, and can I connect as someone else?**

   Organizational account authenticates the connection using a signed-in Entra identity rather than stored database credentials. The Create New Connection dialog defaults to the account you are currently signed in as and offers a Switch account link if you need a different one.

8. **Do I need to create a new connection for every PowerTable sheet?**

   You only need to create a connection once – this connection allows you to connect your PowerTable sheet to a Fabric SQL database. You can reuse this same connection for any PowerTable sheet connecting to any Fabric SQL database within your client – you do not need a new one each time.

9. **Is a PowerTable sheet the same thing as the SQL table it points at?**

   No — the sheet is a view and editing surface over a table in the Fabric SQL database, and the two are named separately. The sheet that you create is bound to the table that you’re either creating or connecting to while setting up the sheet. That separation is why edits stay pending in the sheet until you click Save to Database.

10. **When should I pick an "Existing Table" instead of a "New Table", and can I use a schema other than dbo?**
    Existing Table binds the sheet to a table already present in the database – you'll choose this option when you need to connect to a table that already exists. New Table creates the table from the data you import from an excel file, CSV file or from a semantic model.

11. **What does the Exclude records and import table structure only checkbox do?**
    It creates the table from the spreadsheet's columns and data types without loading any of the rows. You can use this option if you just want an empty table into which you'd like to bulk import or manually insert data into later.

12. **What does checking Identity Column do, and can I change it afterwards?**
    Checking the Identity Column while configuring a table creates a constraint on the table in the database – it creates the column as an auto-sequence column. When new rows are created in the table, the value of the column is automatically incremented.

13. **What file types can I upload during table creation?**
    When creating a new table, you can import data from either an excel file or a CSV file. Additionally, you can also connect to a Semantic Model in your tenant.

14. **What other types of databases can I connect to using PowerTable?**
    At the moment, PowerTable supports connections only to Fabric SQL databases. To bring in data from other sources, you can consider mirroring or copying data from those sources into a Fabric SQL database.

15. **What does the Enable support for Slowly Changing Dimensions (SCD) toggle do?**
    Enabling support for SCD allows you to configure a table with SCD Type II or Type III tracking. This allows you to maintain the history of changes of each row or for specific columns, depending on what option you choose. There are certain pre-requisites for you to set up a table with SCD Type II and Type III tracking – you can find out more about these prerequisites using Microsoft's online documentation.

## Part 3 Setting up the Assets sheet

### 16. What is the difference between Input Type and Data Type in the column edit dialog?

Data Type is the underlying SQL type and is shown greyed out — VARCHAR for Logo URL, INT for Assigned To — so it is not editable from this dialog. Input Type controls how PowerTable renders and captures the value in the PowerTable sheet. For Example, Changing Logo URL to Image in step 6 changes the presentation only; the column still stores a VARCHAR URL.

### 17. What does the Image input type accept?

Direct image URLs, or Base64 strings beginning with data:image.

### 18. If I change Display Name, does the column get renamed in the database?

No — Display Name is a presentation label on the Display tab, applied on top of the physical column.

### 19. What is the Description field on the Display tab for?

It supplies text that appears when a user hovers over the column header. This is particularly useful if you want to provide a business context or a definition or any additional information about a column.

### 20. What does Values Type “Distinct Values” do on a Single Select column?

It builds the dropdown options from the values already present in that column rather than from a list you define. PowerTable reads the list of all unique values within that column and presents them on the single select list for end users.

### 21. If Distinct Values builds the list from existing data, how does anyone add a value that isn't there yet?

Through the **Allow Adding New Options** checkbox in the constraints section of the column dialog. When this is enabled, users can add a new value to the list by searching for it in the search dialog of the dropdown – if the value doesn’t already exist, the option to add it to the list is displayed.

### 22. Does setting a default value change rows that already exist?

No. Default values apply only to new records and existing records will not be affected.

### 23. Why does the Retired formatting rule use “Apply To Rows”, and could I format only the Status cell instead?

**Apply To Rows** styles the entire row when the condition matches, which is what makes retired assets read as a unit. It is also possible to format just the status cell by selecting the appropriate cell when setting up or editing the formatting rules.

### 24. Where do formatting rules live after I create them, and can I turn one off without deleting it?

They live in the Manage Rule dialog, reachable from Format Rules on the Format tab.

### 25. Does a lookup column only display looked up values that are a part of the current table its configured in?

A lookup column produces the complete set of distinct values from the lookup table and not just the list of values present in the column where the lookup has been configured.

### 26. How do I add a new value to a lookup column?

To bring in a new value into the lookup column, you will have to insert it directly into the table containing the list of values first.

### 27. On a Lookup column, what is actually stored in the row — the key or the display value?

The key for the value being displayed. When setting up a Lookup column, we’re treating the values in the column that we’re setting up a lookup for as a business key and substitute it with other values corresponding to that key within the same or a different table.

### 28. Is it possible to look up values within the same table in which I’m setting up a lookup column?

Yes. It is possible to create a circular reference to the same table to do a lookup of a different column. *For example, on an employee table, you could have an ID for each employee, their name and their manager’s ID. The manager can be configured as a lookup column referring to the employee table itself.*

### 29. What does the “Add Hierarchy” do in the Lookup configuration?

The **Add Hierarchy** option allows you to display a drilldown hierarchy within the lookup dropdown for a column, allowing you to neatly organize the list of values in the dropdown menu for a column using a hierarchical list of items. This hierarchy can be configured using multiple tables connected together using common columns.

### 30. What does the “Filter based on another column” option do in the Lookup configuration?

The **Filter based on another column** allows you to filter the values of a lookup column based on columns that are common between the source and the lookup tables. This produces a dropdown list of items that are filtered based on the corresponding value of another column within the same row.

### 31. What does the Expected EOL Date formula column calculate?

It adds the asset's expected lifetime to its purchase date to produce an end-of-life date. The formula is DATEADD([Purchase Date], (365*[Expected Lifetime In Years])), so a lifetime of 3 years adds 1,095 days to Purchase Date.

### 32. Why can't I paste the formula in?

Pasting will not work — PowerTable resolves column references behind the scenes as you type, and pasted text does not carry those references. Type the formula manually, using Ctrl + Space to insert each column reference rather than typing the bracketed name as plain text.

### 33. Does the formula column get written to the database?

Only if you tick Create a database column in the Add Formula Column dialog. Even if the formula column is not written to the database, it persists within the sheet – the next time you open the sheet back up, you’ll still see the formula column with values updated based on any changes in the data since.

## Part 4 Data Management in PowerTable

### 34. Why do my edits not reach the database as soon as I make them?

PowerTable holds edits as pending changes until you commit them. The moment you change a cell, Save to Database, Preview Changes and Discard Changes become enabled, and the Preview Changes button shows a running count. Nothing reaches fabric_plan_training until you click Save to Database, which is also what lets you batch several edits into one commit.

### 35. What does the “Save Changes?” prompt do, and what happens if I tick “Don't show this again?”

It confirms that pending updates should be applied to the data source, and proceeds to commits them to the database. Checking “Don't show this again” suppresses the confirmation for subsequent saves so that Save to Database commits without a prompt. A successful commit shows a “Data saved successfully” toast, the page refreshes, and the three change buttons are disabled until further changes made.

### 36. How do I empty a cell rather than overwrite it?

Right-click the cell and choose Clear Contents.

### 37. What does “Insert Using Form By Default” change?

It changes what the Insert Row button does when clicked directly. With the toggle off, Insert Row adds a blank row to the grid; with it on, , the same button opens the Record Details form instead.

### 38. What does Insert Multiple Rows do?

It allows users to insert up to 1000 new blank rows to the table. Clicking the option will prompt you for the number of rows that need to be inserted.

### 39. In the insert form, do I have to fill in every field, and does “Apply” save the record?

Apply does not save — it closes the form and stages the new row as a pending change. Fields marked Mandatory during table configuration must be supplied; identity columns are autogenerated. You may leave optional fields blank (these are the fields that are not indicated by an asterisk).

### 40. Why does the Form Editor behave differently when I select more than one row?

Because multiple-row mode replaces only the fields you actually edited, leaving unedited fields on each row unchanged. Single-row mode shows the existing values for that record, so you can read as well as write. Multiple-row mode cannot display existing values or clear a field, which is set out in the comparison table in the exercise.

### 41. Does clicking Apply in the Form Editor commit anything?

No. Apply creates a pending change that can be combined with other pending changes and then saved, previewed or discarded. The commit is still Save to Database.

### 42. Which rows does Bulk Edit act on?

The option is only enabled when multiple rows are selected using the row selectors (checkboxes corresponding to each row). These are the only rows the Bulk Edit acts on.

### 43. What does the Offset Value action do, and how is it different from setting a value?

Offset Value changes each row's existing value by an amount rather than replacing it, so the result differs per row. It allows you to increase, decrease, multiply or divide the existing value by a specified amount.

### 44. Can I run more than one Bulk Edit action at once?

Yes — click “Add Action” after configuring each one and they apply together when you click Apply.

### 45. Can I undo part of a batch before committing it?

Yes. Preview Changes opens a view listing the pending changes across All, Added, Updated and Deleted tabs, where you can select one or more rows and revert those specific changes with Reset.

### 46. Does Find and Replace search the whole sheet?

No — you pick a single column in the Column dropdown, and the replacement is confined to it. Without Match entire cell contents, the operation would replace the text wherever it occurs inside a value rather than only in cells equal to it.

### 47. Does Replace all write straight to the database?

No — it produces pending changes like every other edit path. You will have to commit to the database after making the changes and dismissing the Find & Replace window.

### 48. There are five editing methods — how do I know which to use?

The table in step 18 maps them against capabilities, and the shape of the edit usually picks the method. The Row Editor is the only one supporting copy and paste across rows and fill down; the single-row Form Editor is the only form-based way to view existing values; Bulk Edit is the only method that offsets values arithmetically across a selection; Find and Replace is the only one that replaces a value across multiple rows and columns in a single action. All five support Preview Changes and Discard Changes.

### 49. What does the Import flow do with rows that already exist?

It classifies every row before anything is written. After you select the sheet and click Proceed, PowerTable scans the file and sorts rows into Insert, Update and Error tabs with counts, and clicking Import applies them.

### 50. What is the difference between the two Audit tabs?

The Data tab records insert, update and delete actions against the rows, showing Row Id, Action, Transaction ID, Source Type, the modified column and its old and new values. The Access tab records changes to Row and Column Access security settings instead.