

Acme Beverages needs an Asset Management data app. Their Asset data is currently being tracked in spreadsheets. This data needs to be moved to a database and handled using a mini data-app on Microsoft Fabric using Fabric Plan.

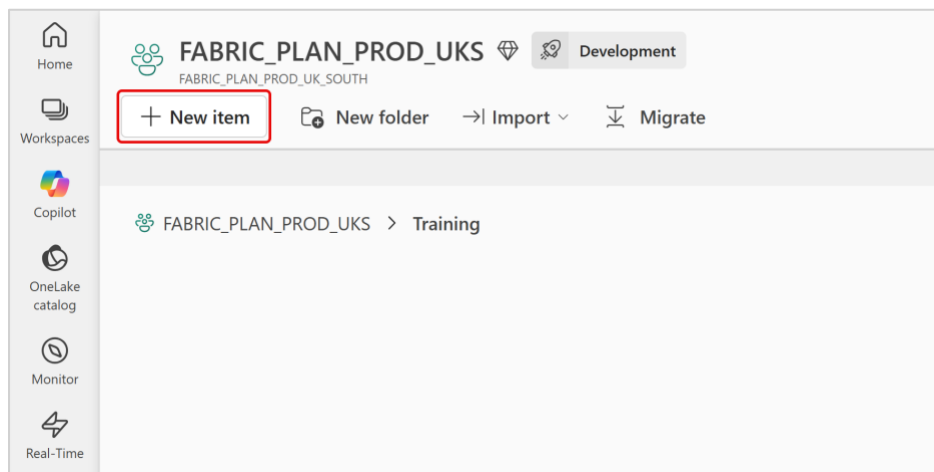
Part 1

Create and Connect the Fabric Plan item

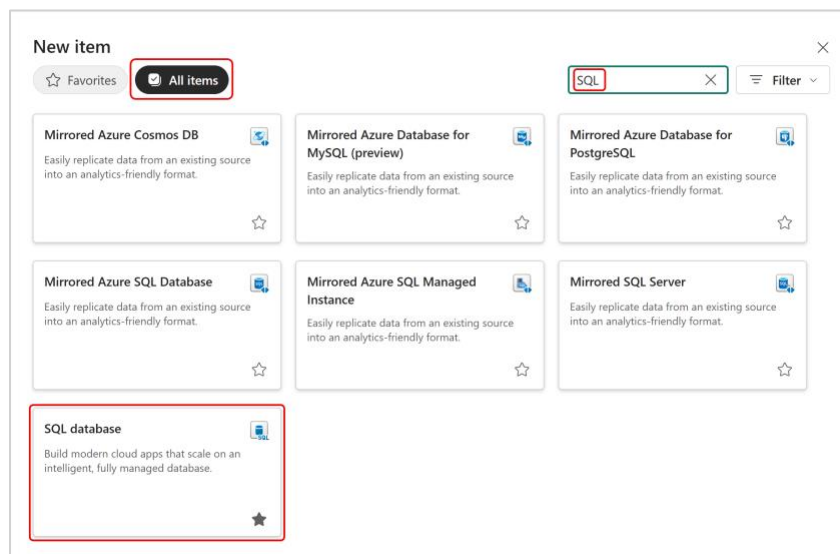
A quick setup to get the Fabric Plan item running — create the Fabric SQL database that the PowerTable app will use for data management and create the Fabric Plan item that will hold the PowerTable app.

1. Create a new Fabric SQL database

- I. Navigate to the training workspace and click the **New item** button in the toolbar.



- II. In the **New item** side panel, select **All items**, search for **SQL**, and select **SQL database**.



III. Enter *fabric_plan_training* for **Name** and click the **Create** button.

New SQL database

Name *

Create
Cancel

IV. View the newly created database in the training workspace.

Home
Workspaces
Copilot
OneLake catalog
Monitor
Real-Time

FABRIC_PLAN_PROD_UKS
FABRIC_PLAN_PROD_UK_SOUTH
+ New item
New folder
Import
Migrate

FABRIC_PLAN_PROD_UKS > Training

Name	Status	Type	Task
fabric_plan_training		SQL database	—
fabric_plan_training		SQL analytic...	—

2. Create a new Fabric Plan item

I. Navigate to the training workspace and click the **New item** button in the toolbar.

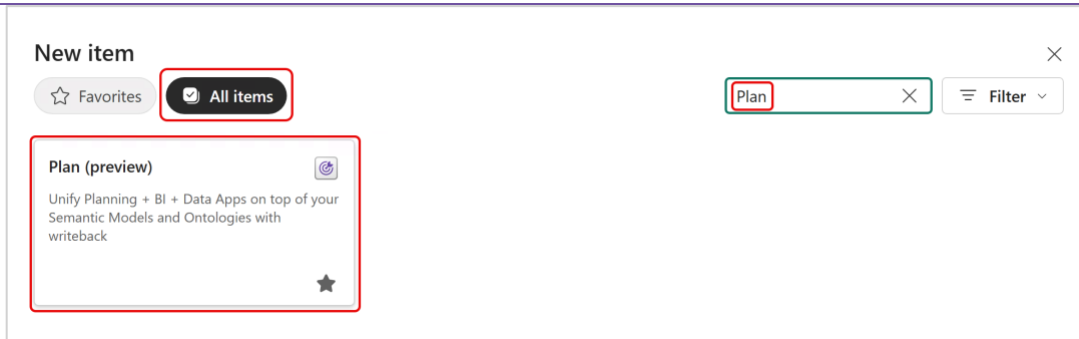
Home
Workspaces
Copilot
OneLake catalog
Monitor
Real-Time

FABRIC_PLAN_PROD_UKS
FABRIC_PLAN_PROD_UK_SOUTH
+ New item
New folder
Import
Migrate

FABRIC_PLAN_PROD_UKS > Training

Name	Status	Type	Task
fabric_plan_training		SQL database	—
fabric_plan_training		SQL analytic...	—

II. In the **New item** side panel, select **All items**, search for **SQL**, and select **SQL database**.



III. Enter *Asset Management* for **Name** and click the **Create** button.

New Plan

Name *

Location *

 FABRIC_PLAN_PROD_UKS > Training

Create
Cancel

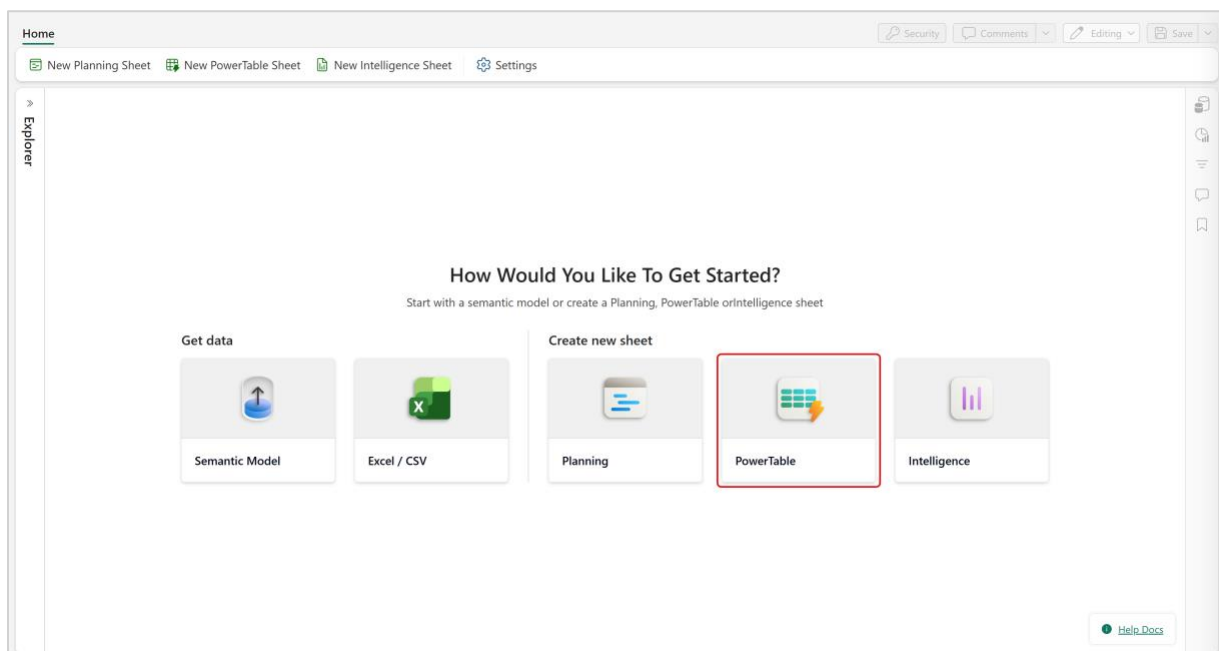
Part 2 Create the PowerTable sheets

~20 min

Create the Assets, Employees, and Locations sheets using data imported from an Excel spreadsheet.

3. Create the Asset PowerTable sheet

I. Click the **PowerTable** button in the **Create new sheet** section.



II. Enter **Assets** for **Name** and click the **Create** button.

New PowerTable Sheet

Name *

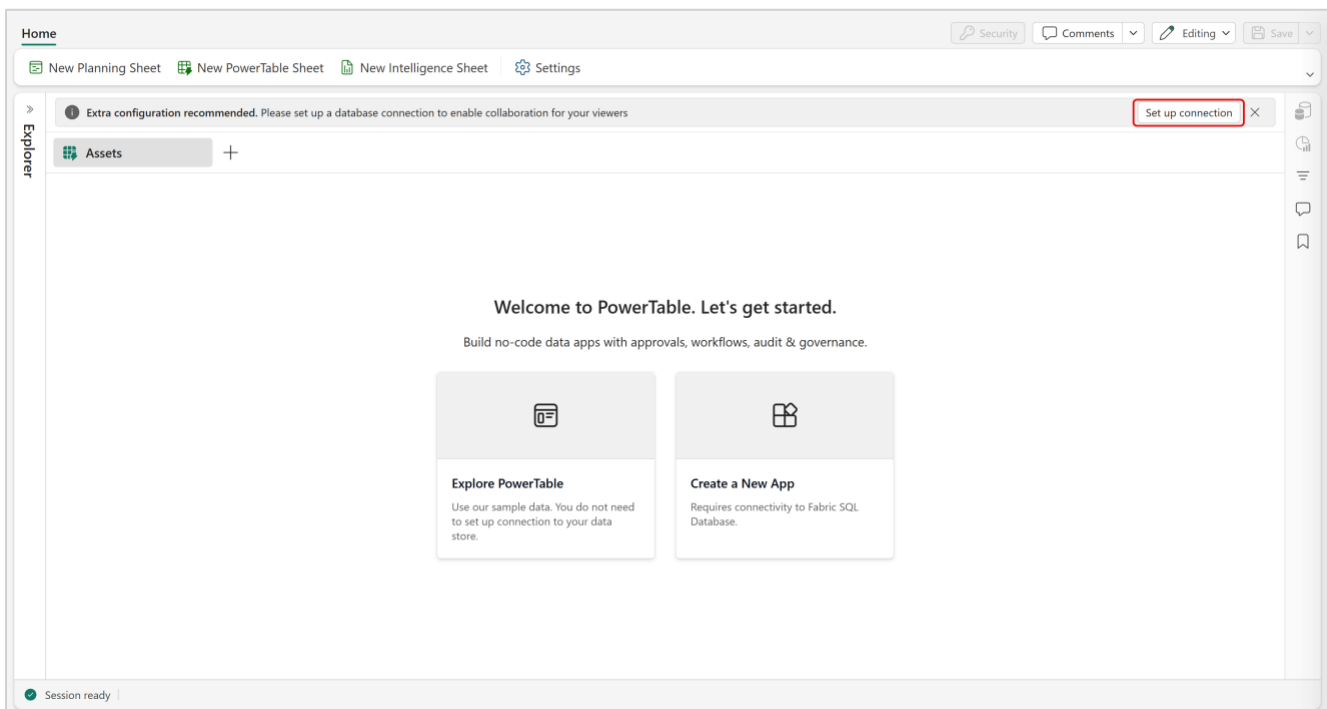
Create

Cancel

Note:

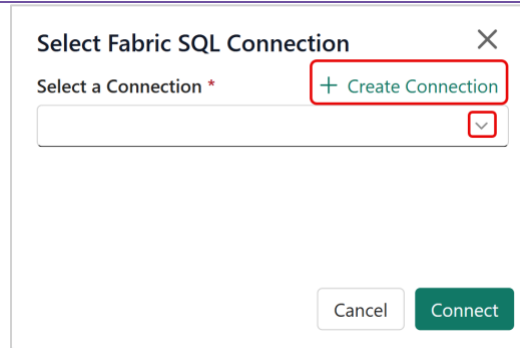
This following Setup connection steps are only required one time for each Fabric Plan item. This connection is used to connect the Plan item to the system database and allows users with a Viewer workspace role the ability to use this Plan item.

III. Click the **Set up connection** button.



The screenshot shows the Fabric Plan application interface. At the top, there's a navigation bar with 'Home', 'New Planning Sheet', 'New PowerTable Sheet', 'New Intelligence Sheet', and 'Settings'. Below this is a toolbar with 'Security', 'Comments', 'Editing', and 'Save'. The main workspace area has a header with a message: 'Extra configuration recommended. Please set up a database connection to enable collaboration for your viewers'. A red box highlights the 'Set up connection' button in the top right of this header. Below the header, there's a sidebar on the left with 'Assets' and a plus sign. The main content area displays 'Welcome to PowerTable. Let's get started.' with two cards: 'Explore PowerTable' and 'Create a New App'. The status bar at the bottom shows 'Session ready'.

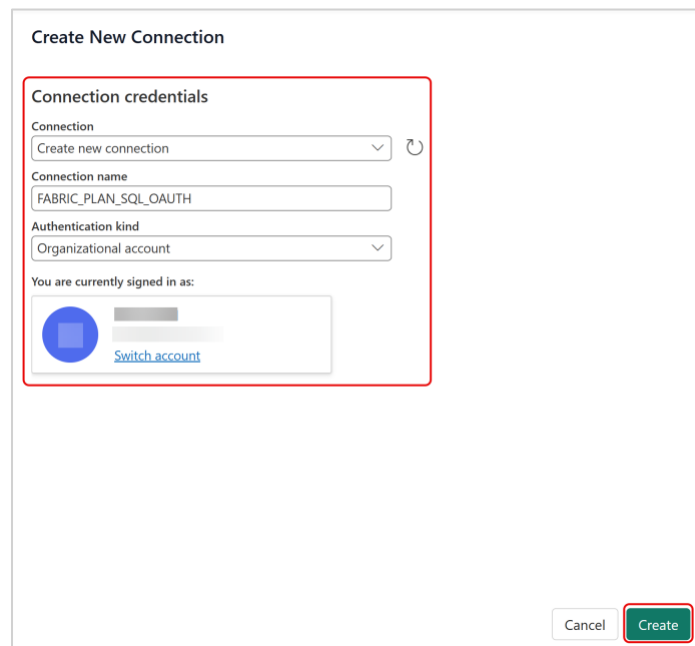
IV. Click the **Create Connection** button. Alternately, click the dropdown button to select an existing connection.



Select Fabric SQL Connection

Select a Connection * + Create Connection

- V. Configure the **Create New Connection** dialog with the following values and then click the **Create** button.
- Connection:** select *Create new connection*
 - Connection Name:** enter the name of your new connection
 - Authentication kind:** select *Organizational account*
 - You are current signed in as:** this default to your account, click **Switch account** if you want to change it.



Create New Connection

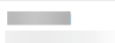
Connection credentials

Connection
Create new connection

Connection name
FABRIC_PLAN_SQL_OAUTH

Authentication kind
Organizational account

You are currently signed in as:

 
[Switch account](#)

- VI. Click the **Connect** button.

Select Fabric SQL Connection

×

Select a Connection *

+ Create Connection

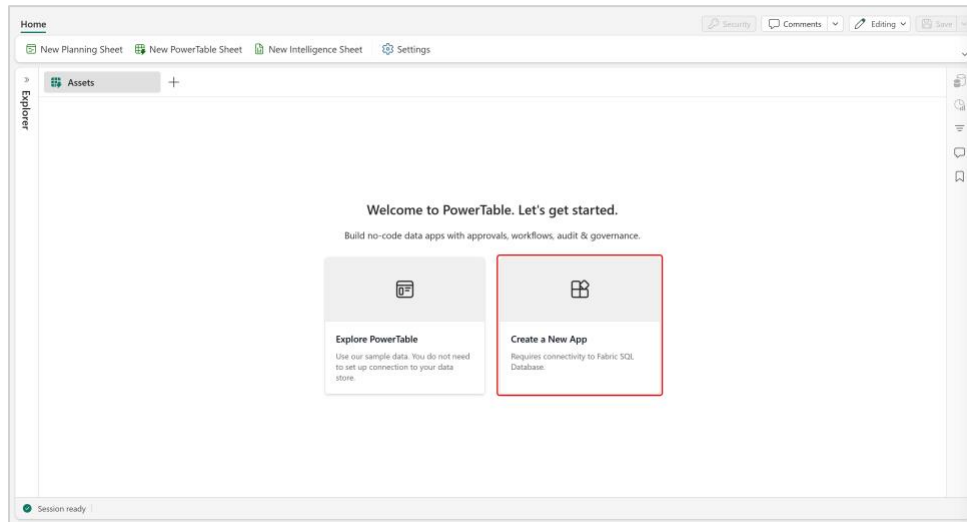
FABRIC_PLAN_SQL_OAUTH

▼

Cancel

Connect

VII. Click the **Create a New App** button.



VIII. Select the connection that you created in **step 2.v.** and the database that you created in **step 1.iii.** and click the **Connect** button.

Select Fabric SQL Connection

×

Select a Connection *

+ Create Connection

FABRIC_PLAN_SQL_OAUTH

▼

Database Name *

fabric_plan_training

🔍

Cancel

Connect

IX. Configure the **Select Table** popup as follows:

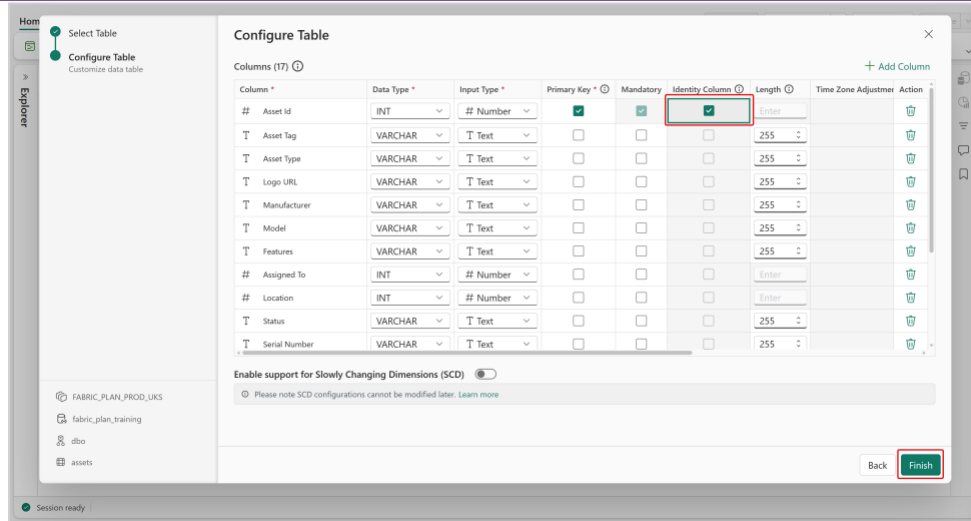
- Select Table:** select *New Table*
- Schema:** select *dbo*
- Table Name:** enter *assets*

- d. **Import Data:** select *Upload File*
- e. **Import Type:** select *Excel*
- f. **Upload File:** click and select the *assets.xlsx* file.

X. Select **Sheet1** from the dropdown and click the **Next** button.

Asset Id	Asset Tag	Asset Type	Logo URL	Manufacturer	Model
1	IT-1245	Laptop	https://upload.wikimedia.or...	Apple	MacBook Air M1
2	IT-1246	Desktop	https://upload.wikimedia.or...	Apple	iMac 24
3	IT-1247	Desktop	https://upload.wikimedia.or...	Lenovo	ThinkCentre M720
4	IT-1248	Laptop	https://upload.wikimedia.or...	Lenovo	IdeaPad Flex 5

XI. Check the **Identity Column** check box for the **Asset Id** column and click then **Finish** button.



Configure Table

Columns (17)

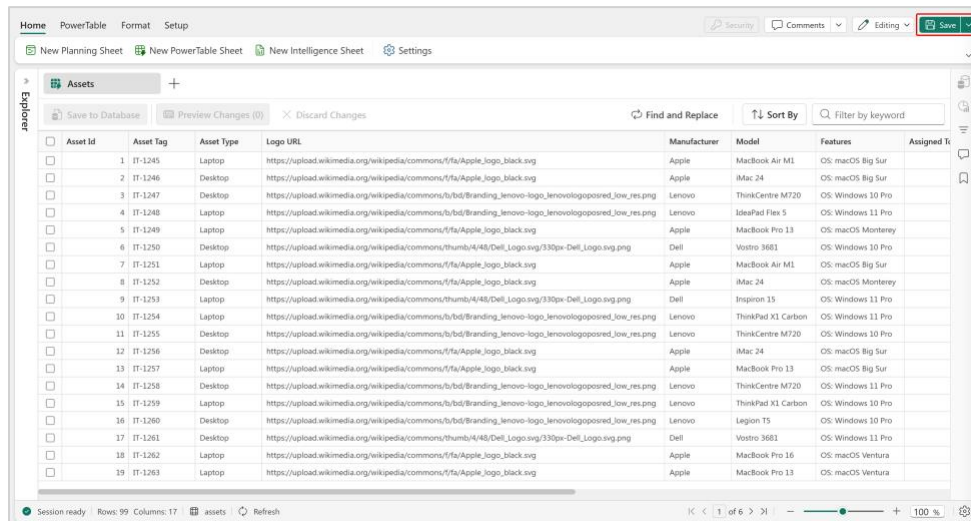
Column *	Data Type *	Input Type *	Primary Key *	Mandatory	Identity Column	Length	Time Zone Adjuster	Action
# Asset Id	INT	# Number	☒	☒	☒			
T Asset Tag	VARCHAR	T Text	☐	☐	☐	255		
T Asset Type	VARCHAR	T Text	☐	☐	☐	255		
T Logo URL	VARCHAR	T Text	☐	☐	☐	255		
T Manufacturer	VARCHAR	T Text	☐	☐	☐	255		
T Model	VARCHAR	T Text	☐	☐	☐	255		
T Features	VARCHAR	T Text	☐	☐	☐	255		
# Assigned To	INT	# Number	☐	☐	☐			
# Location	INT	# Number	☐	☐	☐			
T Status	VARCHAR	T Text	☐	☐	☐	255		
T Serial Number	VARCHAR	T Text	☐	☐	☐	255		

Enable support for Slowly Changing Dimensions (SCD) ☐

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

Back **Finish**

XII. Click the **Save** button.



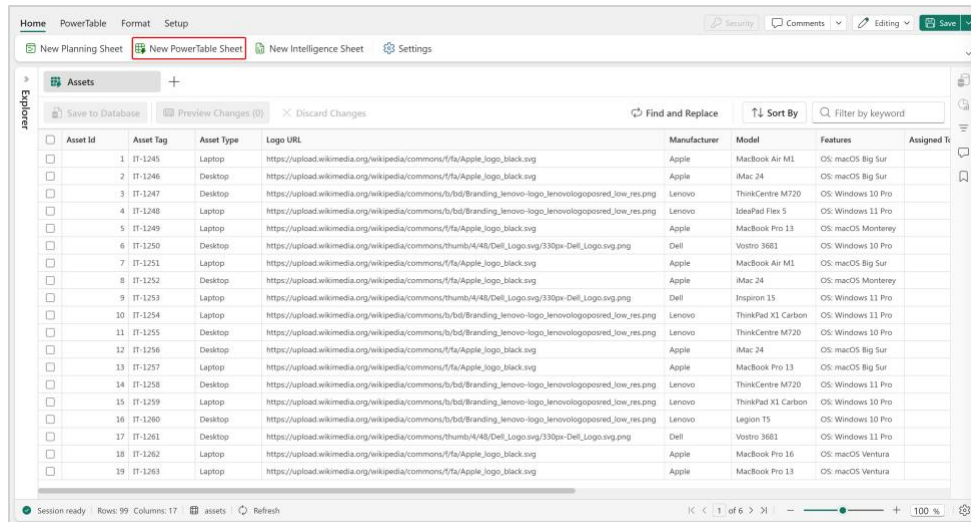
Assets

Asset Id	Asset Tag	Asset Type	Logo URL	Manufacturer	Model	Features	Assigned To
1	IT-1245	Laptop	https://upload.wikimedia.org/wikipedia/commons/f/fa/Apple_logo_black.svg	Apple	MacBook Air M1	OS: macOS Big Sur	
2	IT-1246	Desktop	https://upload.wikimedia.org/wikipedia/commons/f/fa/Apple_logo_black.svg	Apple	iMac 24	OS: macOS Big Sur	
3	IT-1247	Desktop	https://upload.wikimedia.org/wikipedia/commons/f/bd/Branding_lenovo-logo_lenovologospoered_low_res.png	Lenovo	ThinkCentre M720	OS: Windows 10 Pro	
4	IT-1248	Laptop	https://upload.wikimedia.org/wikipedia/commons/f/bd/Branding_lenovo-logo_lenovologospoered_low_res.png	Lenovo	IdeaPad Flex 5	OS: Windows 11 Pro	
5	IT-1249	Laptop	https://upload.wikimedia.org/wikipedia/commons/f/fa/Apple_logo_black.svg	Apple	MacBook Pro 13	OS: macOS Monterey	
6	IT-1250	Desktop	https://upload.wikimedia.org/wikipedia/commons/thumb/4/48/Dell_Logo.svg/330px-Dell_Logo.svg.png	Dell	Vostro 3681	OS: Windows 10 Pro	
7	IT-1251	Laptop	https://upload.wikimedia.org/wikipedia/commons/f/fa/Apple_logo_black.svg	Apple	MacBook Air M1	OS: macOS Big Sur	
8	IT-1252	Desktop	https://upload.wikimedia.org/wikipedia/commons/f/fa/Apple_logo_black.svg	Apple	iMac 24	OS: macOS Monterey	
9	IT-1253	Laptop	https://upload.wikimedia.org/wikipedia/commons/thumb/4/48/Dell_Logo.svg/330px-Dell_Logo.svg.png	Dell	Inspiron 15	OS: Windows 11 Pro	
10	IT-1254	Laptop	https://upload.wikimedia.org/wikipedia/commons/f/bd/Branding_lenovo-logo_lenovologospoered_low_res.png	Lenovo	ThinkPad X1 Carbon	OS: Windows 11 Pro	
11	IT-1255	Desktop	https://upload.wikimedia.org/wikipedia/commons/f/bd/Branding_lenovo-logo_lenovologospoered_low_res.png	Lenovo	ThinkCentre M720	OS: Windows 10 Pro	
12	IT-1256	Desktop	https://upload.wikimedia.org/wikipedia/commons/f/fa/Apple_logo_black.svg	Apple	iMac 24	OS: macOS Big Sur	
13	IT-1257	Laptop	https://upload.wikimedia.org/wikipedia/commons/f/fa/Apple_logo_black.svg	Apple	MacBook Pro 13	OS: macOS Big Sur	
14	IT-1258	Desktop	https://upload.wikimedia.org/wikipedia/commons/f/bd/Branding_lenovo-logo_lenovologospoered_low_res.png	Lenovo	ThinkCentre M720	OS: Windows 11 Pro	
15	IT-1259	Laptop	https://upload.wikimedia.org/wikipedia/commons/f/bd/Branding_lenovo-logo_lenovologospoered_low_res.png	Lenovo	ThinkPad X1 Carbon	OS: Windows 10 Pro	
16	IT-1260	Desktop	https://upload.wikimedia.org/wikipedia/commons/f/bd/Branding_lenovo-logo_lenovologospoered_low_res.png	Lenovo	Legion T5	OS: Windows 10 Pro	
17	IT-1261	Desktop	https://upload.wikimedia.org/wikipedia/commons/thumb/4/48/Dell_Logo.svg/330px-Dell_Logo.svg.png	Dell	Vostro 3681	OS: Windows 11 Pro	
18	IT-1262	Laptop	https://upload.wikimedia.org/wikipedia/commons/f/fa/Apple_logo_black.svg	Apple	MacBook Pro 16	OS: macOS Ventura	
19	IT-1263	Laptop	https://upload.wikimedia.org/wikipedia/commons/f/fa/Apple_logo_black.svg	Apple	MacBook Pro 13	OS: macOS Ventura	

Session ready | Rows: 99 | Columns: 17 | assets | Refresh

4. Create the Employees PowerTable sheet

I. Click the **New PowerTable Sheet** button.



II. Enter *Employees* for **Name** and click the **Create** button.

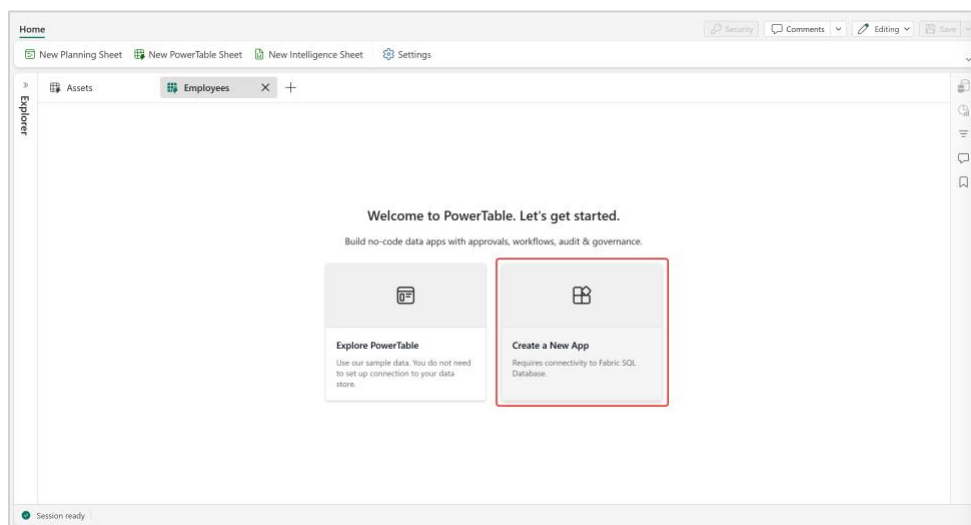
New PowerTable Sheet

Name *

Create

Cancel

III. Click the **Create a New App** button.



IV. Select the connection that you created in **step 2.v.** and the database that you created in **step 1.iii.** and click the **Connect** button.

Select Fabric SQL Connection

Select a Connection * [+ Create Connection](#)

FABRIC_PLAN_SQL_OAUTH

Database Name *

fabric_plan_training

Cancel **Connect**

V. Configure the **Select Table** popup as follows:

- Select Table:** select *New Table*
- Schema:** select *dbo*
- Table Name:** enter *employees*
- Import Data:** select *Upload File*
- Import Type:** select *Excel*
- Upload File:** click and select the *assets.x/sx* file.

Home

Select Table
Choose a table

Configure Table

Explorer

FABRIC_PLAN_PROD_UKES

fabric_plan_training

dbo

employees

Session ready

Select Table

Select Table

Existing Table
Data already exists in the database

New Table
Import data and create a new table

Schema *

dbo

Table Name *

employees

Import Data

☒ Upload File ☐ Connect To Semantic Model ☐ Enter Data Manually

Import Type

Excel

Upload File

Click or drop files here

Only .xlsx files can be uploaded. File size must not exceed 25 MB.

Back Next

VI. Select **Sheet2** from the dropdown and click the **Next** button.

Uploaded File
 assets.xlsx [Change](#)

Preview Data ☐ Exclude records and import table structure only Sheet2

Employee Id	Employee Code	First Name	Last Name	Full Name	Job Title
1	B001	Kate	Williams	Kate Williams	Engineering Head II
2	B002	John	Williams	John Williams	Software Engineer
3	B003	Abigail	White	Abigail White	Marketing Analyst
4	B004	Emma	Williams	Emma Williams	Systems Engineer

First 30 row(s) shown in preview Total Row Count : 30

[Back](#) [Next](#)

VII. Check the **Identity Column** check box for the **Employee Id** column and click then **Finish** button.

Configure Table

Columns (9)

Column *	Data Type *	Input Type *	Primary Key *	Mandatory	Identity Column	Length	Time Zone Adjustment	Action
# Employee Id	INT	# Number	☒	☒	☒	Enter		
T Employee Code	VARCHAR	T Text	☐	☐	☐	255		
T First Name	VARCHAR	T Text	☐	☐	☐	255		
T Last Name	VARCHAR	T Text	☐	☐	☐	255		
T Full Name	VARCHAR	T Text	☐	☐	☐	255		
T Job Title	VARCHAR	T Text	☐	☐	☐	255		
T Department	VARCHAR	T Text	☐	☐	☐	255		
# Manager	INT	# Number	☐	☐	☐	Enter		
T Hire Date	DATE	T Date	☐	☐	☐	Enter		

Enable support for Slowly Changing Dimensions (SCD) ☐

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

[Back](#) [Finish](#)

VIII. Click the **Save** button.

Home PowerTable Format Setup Security Comments Editing [Save](#)

New Planning Sheet New PowerTable Sheet New Intelligence Sheet Settings

Assets **Employees** [+](#)

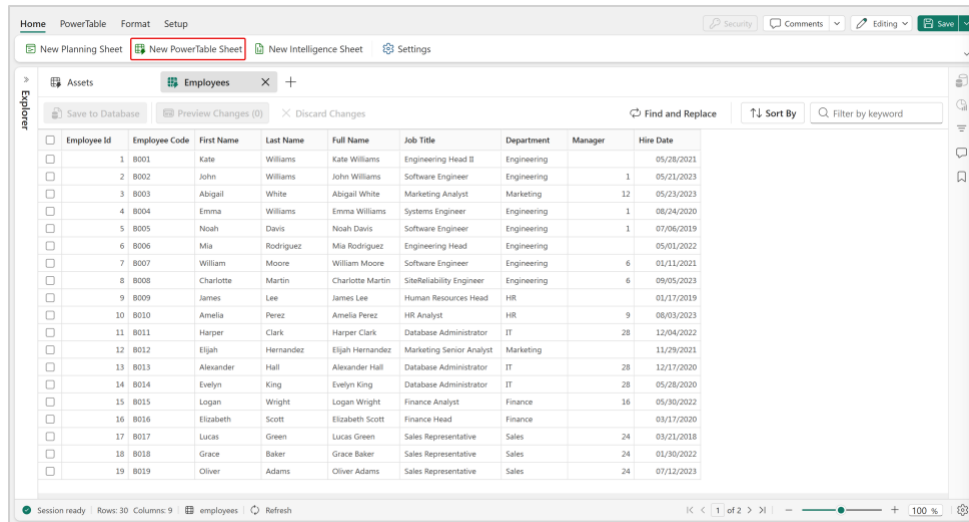
[Save to Database](#) [Preview Changes \(0\)](#) [Discard Changes](#) [Find and Replace](#) [Sort By](#) [Filter by keyword](#)

Employee Id	Employee Code	First Name	Last Name	Full Name	Job Title	Department	Manager	Hire Date
☐	1	B001	Kate	Williams	Kate Williams	Engineering Head II	Engineering	05/28/2021
☐	2	B002	John	Williams	John Williams	Software Engineer	Engineering	05/21/2023
☐	3	B003	Abigail	White	Abigail White	Marketing Analyst	Marketing	05/23/2023
☐	4	B004	Emma	Williams	Emma Williams	Systems Engineer	Engineering	08/24/2020
☐	5	B005	Noah	Davis	Noah Davis	Software Engineer	Engineering	07/06/2019
☐	6	B006	Mia	Rodriguez	Mia Rodriguez	Engineering Head	Engineering	05/01/2022
☐	7	B007	William	Moore	William Moore	Software Engineer	Engineering	01/11/2021
☐	8	B008	Charlotte	Martin	Charlotte Martin	SiteReliability Engineer	Engineering	09/05/2023
☐	9	B009	James	Lee	James Lee	Human Resources Head	HR	01/17/2019
☐	10	B010	Amelia	Perez	Amelia Perez	HR Analyst	HR	08/03/2023
☐	11	B011	Harper	Clark	Harper Clark	Database Administrator	IT	28 12/04/2022
☐	12	B012	Elijah	Hernandez	Elijah Hernandez	Marketing Senior Analyst	Marketing	11/29/2021
☐	13	B013	Alexander	Hall	Alexander Hall	Database Administrator	IT	28 12/17/2020
☐	14	B014	Evelyn	King	Evelyn King	Database Administrator	IT	28 05/28/2020
☐	15	B015	Logan	Wright	Logan Wright	Finance Analyst	Finance	16 05/30/2022
☐	16	B016	Elizabeth	Scott	Elizabeth Scott	Finance Head	Finance	03/17/2020
☐	17	B017	Lucas	Green	Lucas Green	Sales Representative	Sales	24 03/21/2018
☐	18	B018	Grace	Baker	Grace Baker	Sales Representative	Sales	24 01/30/2022
☐	19	B019	Oliver	Adams	Oliver Adams	Sales Representative	Sales	24 07/12/2023

Session ready Rows: 30 Columns: 9 employees Refresh 1 of 2 100 %

5. Create the Locations PowerTable sheet

I. Click the **New PowerTable Sheet** button.



II. Enter *Locations* for **Name** and click the **Create** button.

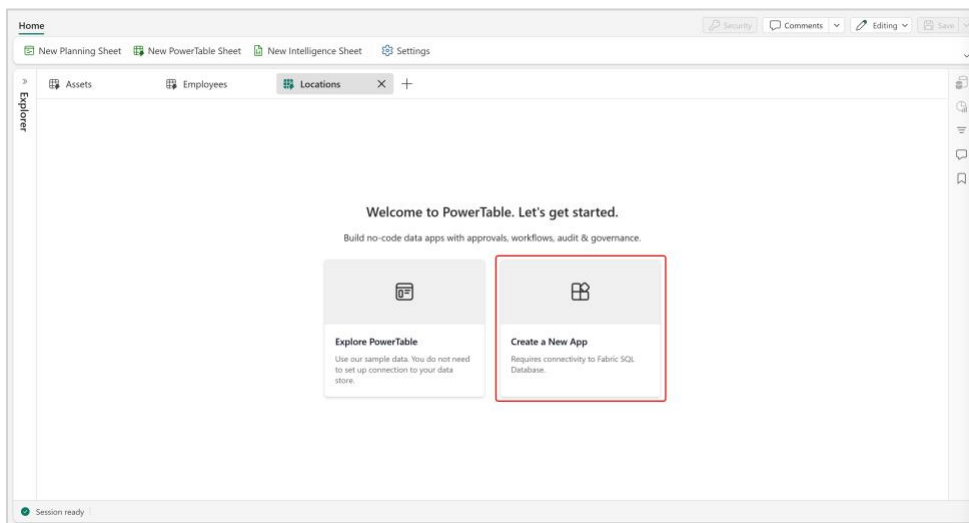
New PowerTable Sheet

Name *

Create

Cancel

III. Click the **Create a New App** button.



IV. Select the connection that you created in **step 2.v.** and the database that you created in **step 1.iii.** and click the **Connect** button.

Select Fabric SQL Connection

Select a Connection * [+ Create Connection](#)

FABRIC_PLAN_SQL_OAUTH

Database Name *

fabric_plan_training

Cancel **Connect**

V. Configure the **Select Table** popup as follows:

- Select Table:** select *New Table*
- Schema:** select *dbo*
- Table Name:** enter *locations*
- Import Data:** select *Upload File*
- Import Type:** select *Excel*
- Upload File:** click and select the *assets.x/sx* file.

Home

Explore

Select Table
Choose a table

Configure Table

FABRIC_PLAN_PROD_UK

fabric_plan_training

dbo

locations

Session ready

Select Table

Select Table

Existing Table
Data already exists in the database

New Table
Import data and create a new table

Schema *

dbo

Table Name *

locations

Import Data

☒ Upload File ☐ Connect To Semantic Model ☐ Enter Data Manually

Import Type

Excel

Upload File

Click or drop files here

Only .xlsx files can be uploaded. File size must not exceed 25 MB.

Back Next

VI. Select **Sheet3** from the dropdown and click the **Next** button.

Uploaded File
 assets.xlsx [Change](#)

Preview Data ☐ Exclude records and import table structure only Sheet3

Location Id	Location	Description	Building	Floor
1	Depot	Storage or in repair	Main	1
2	Disposed	Disposed		
3	Employee	Portable carried by employee		
4	ENG-01001	Office - Kate Williams	Main	1

First 33 row(s) shown in preview Total Row Count : 33

[Back](#) [Next](#)

VII. Check the **Identity Column** check box for the **Location Id** column and click then **Finish** button.

Configure Table

Columns (5)

Column *	Data Type *	Input Type *	Primary Key *	Mandatory	Identity Column	Length	Time Zone Adjustment	Action
# Location Id	INT	# Number	☒	☒	☒	Enter		
T Location	VARCHAR	T Text	☐	☐	☐	255		
T Description	VARCHAR	T Text	☐	☐	☐	255		
T Building	VARCHAR	T Text	☐	☐	☐	255		
# Floor	INT	# Number	☐	☐	☐	Enter		

Enable support for Slowly Changing Dimensions (SCD) ☐

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

[Back](#) [Finish](#)

VIII. Click the **Save** button.

Home PowerTable Format Setup Security Comments Editing [Save](#)

New Planning Sheet New PowerTable Sheet New Intelligence Sheet Settings

Assets Employees **Locations**

Save to Database Preview Changes (0) Discard Changes Find and Replace Sort By Filter by keyword

Location Id	Location	Description	Building	Floor
☐	1 Depot	Storage or in repair	Main	1
☐	2 Disposed	Disposed		
☐	3 Employee	Portable carried by employee		
☐	4 ENG-01001	Office - Kate Williams	Main	1
☐	5 ENG-01002	Office - John Williams	Main	1
☐	6 ENG-01004	Office - Emma Williams	Main	1
☐	7 ENG-01005	Office - Noah Davis	Main	1
☐	8 ENG-01006	Office - Mia Rodriguez	Main	1
☐	9 ENG-01007	Office - William Moore	Main	1
☐	10 ENG-01008	Office - Charlotte Martin	Main	1
☐	11 ENG-01029	Office - Sofia Turner	Main	1
☐	12 ENG-01030	Office - Henry Carter	Main	1
☐	13 FIN-01015	Office - Logan Wright	Main	1
☐	14 FIN-01016	Office - Elizabeth Scott	Main	1
☐	15 FIN-01021	Office - Samuel Rivera	Main	1
☐	16 FIN-01022	Office - Avery Mitchell	Main	1
☐	17 HR-02009	Office - James Lee	Main	2
☐	18 HR-02010	Office - Amelia Perez	Main	2
☐	19 IT-01011	Office - Harper Clark	Main	1

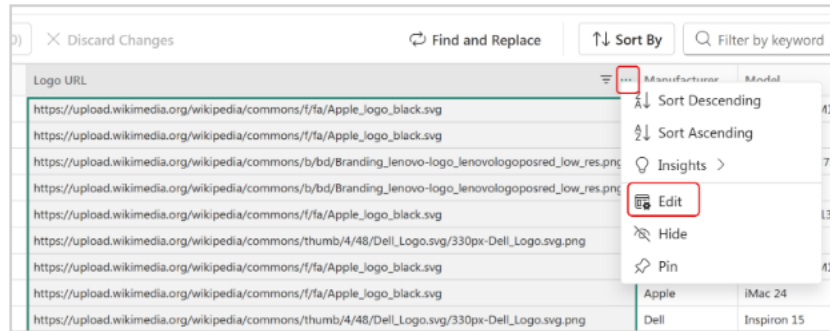
Session ready Rows: 33 Columns: 5 locations Refresh 1 of 2 100%

Part 3 Setting up the Assets Sheet

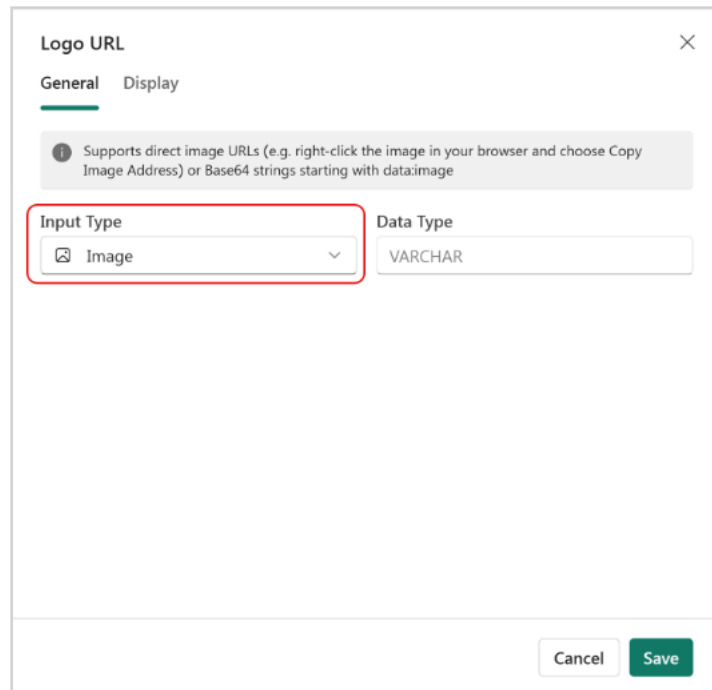
Create the Assets, Employees, and Locations sheets using data imported from an Excel spreadsheet.

6. Format the Logo URL column

- I. Hover over the **Logo URL** column, click on the ellipsis “...” button in the column header, and then select **Edit**.



- II. Click the **Input Type** dropdown and select **Image**.



The screenshot shows a configuration dialog box titled 'Logo URL'. It has two tabs: 'General' (selected) and 'Display'. Under the 'General' tab, there is a note: 'Supports direct image URLs (e.g. right-click the image in your browser and choose Copy Image Address) or Base64 strings starting with data:image'. Below this, there are two dropdown menus: 'Input Type' (set to 'Image' and highlighted with a red box) and 'Data Type' (set to 'VARCHAR'). At the bottom right, there are 'Cancel' and 'Save' buttons.

- III. Click the **Display** tab, enter **Logo** in the **Display Name** field, and click the **Save** button.

Logo URL

General

Display

Description

Visible on hover of the column header

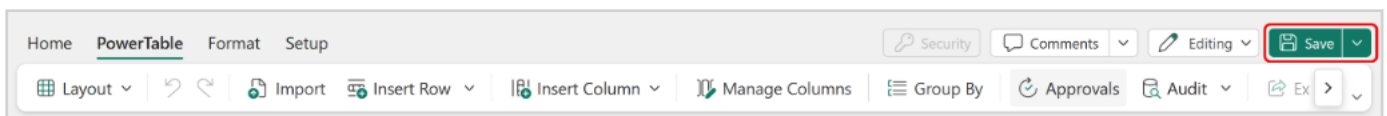
Display Name

Logo

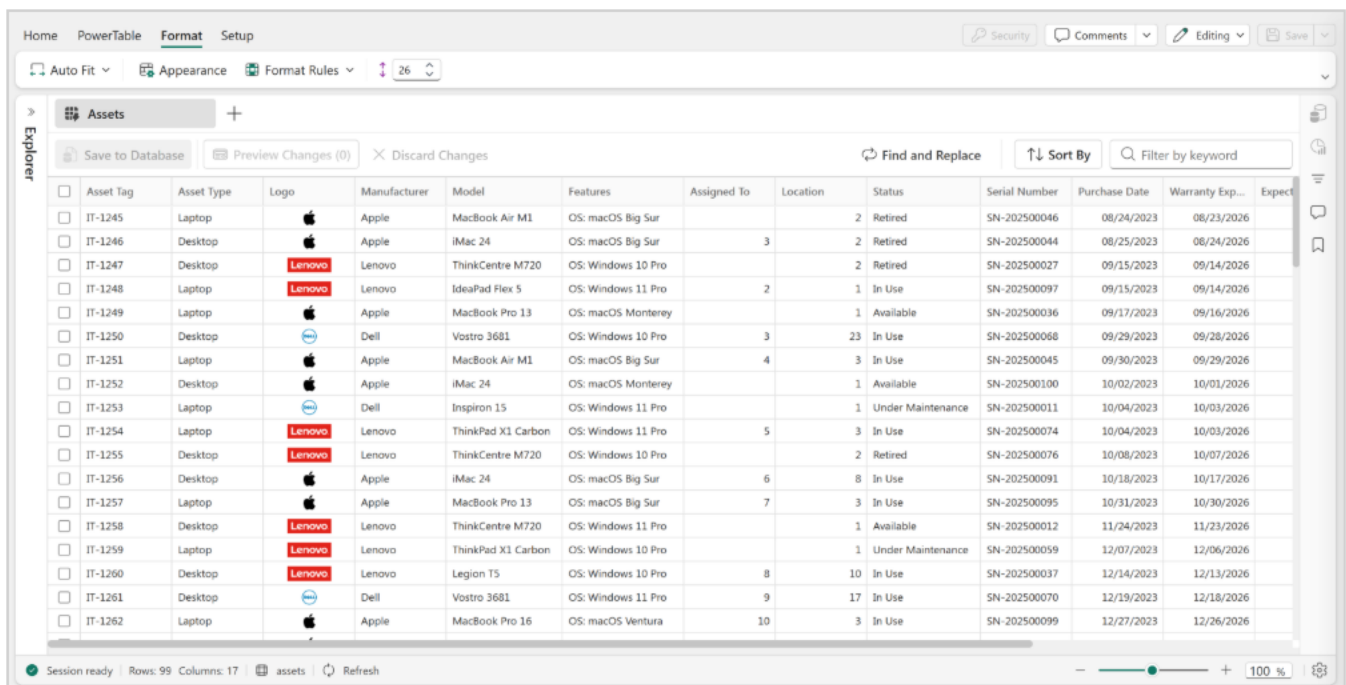
Cancel

Save

IV. Click the **Save** button in the toolbar.



V. Your **Assets** sheet should now look similar to this:

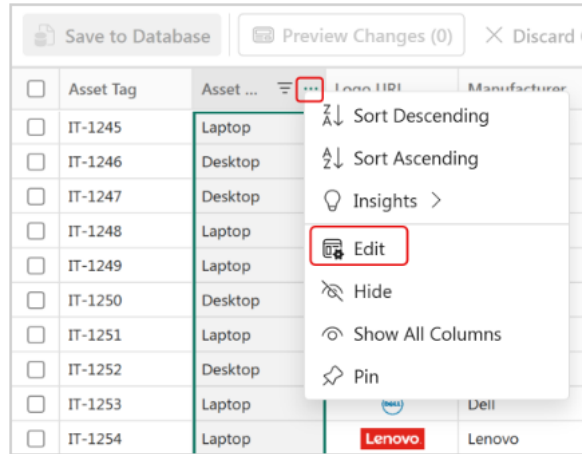


The screenshot displays the 'Assets' sheet within the application. The table contains the following data:

Asset Tag	Asset Type	Logo	Manufacturer	Model	Features	Assigned To	Location	Status	Serial Number	Purchase Date	Warranty Exp...	Expect
IT-1245	Laptop		Apple	MacBook Air M1	OS: macOS Big Sur		2	Retired	SN-202500046	08/24/2023	08/23/2026	
IT-1246	Desktop		Apple	iMac 24	OS: macOS Big Sur		3	Retired	SN-202500044	08/25/2023	08/24/2026	
IT-1247	Desktop		Lenovo	ThinkCentre M720	OS: Windows 10 Pro		2	Retired	SN-202500027	09/15/2023	09/14/2026	
IT-1248	Laptop		Lenovo	IdeaPad Flex 5	OS: Windows 11 Pro		2	In Use	SN-202500097	09/15/2023	09/14/2026	
IT-1249	Laptop		Apple	MacBook Pro 13	OS: macOS Monterey		1	Available	SN-202500036	09/17/2023	09/16/2026	
IT-1250	Desktop		Dell	Vostro 3681	OS: Windows 10 Pro		3	In Use	SN-202500068	09/29/2023	09/28/2026	
IT-1251	Laptop		Apple	MacBook Air M1	OS: macOS Big Sur		4	In Use	SN-202500045	09/30/2023	09/29/2026	
IT-1252	Desktop		Apple	iMac 24	OS: macOS Monterey		1	Available	SN-202500100	10/02/2023	10/01/2026	
IT-1253	Laptop		Dell	Inspiron 15	OS: Windows 11 Pro		1	Under Maintenance	SN-202500011	10/04/2023	10/03/2026	
IT-1254	Laptop		Lenovo	ThinkPad X1 Carbon	OS: Windows 11 Pro		5	In Use	SN-202500074	10/04/2023	10/03/2026	
IT-1255	Desktop		Lenovo	ThinkCentre M720	OS: Windows 10 Pro		2	Retired	SN-202500076	10/08/2023	10/07/2026	
IT-1256	Desktop		Apple	iMac 24	OS: macOS Big Sur		6	In Use	SN-202500091	10/18/2023	10/17/2026	
IT-1257	Laptop		Apple	MacBook Pro 13	OS: macOS Big Sur		7	In Use	SN-202500095	10/31/2023	10/30/2026	
IT-1258	Desktop		Lenovo	ThinkCentre M720	OS: Windows 11 Pro		1	Available	SN-202500012	11/24/2023	11/23/2026	
IT-1259	Laptop		Lenovo	ThinkPad X1 Carbon	OS: Windows 10 Pro		1	Under Maintenance	SN-202500059	12/07/2023	12/06/2026	
IT-1260	Desktop		Lenovo	Legion T5	OS: Windows 10 Pro		8	In Use	SN-202500037	12/14/2023	12/13/2026	
IT-1261	Desktop		Dell	Vostro 3681	OS: Windows 11 Pro		9	In Use	SN-202500070	12/19/2023	12/18/2026	
IT-1262	Laptop		Apple	MacBook Pro 16	OS: macOS Ventura		10	In Use	SN-202500099	12/27/2023	12/26/2026	

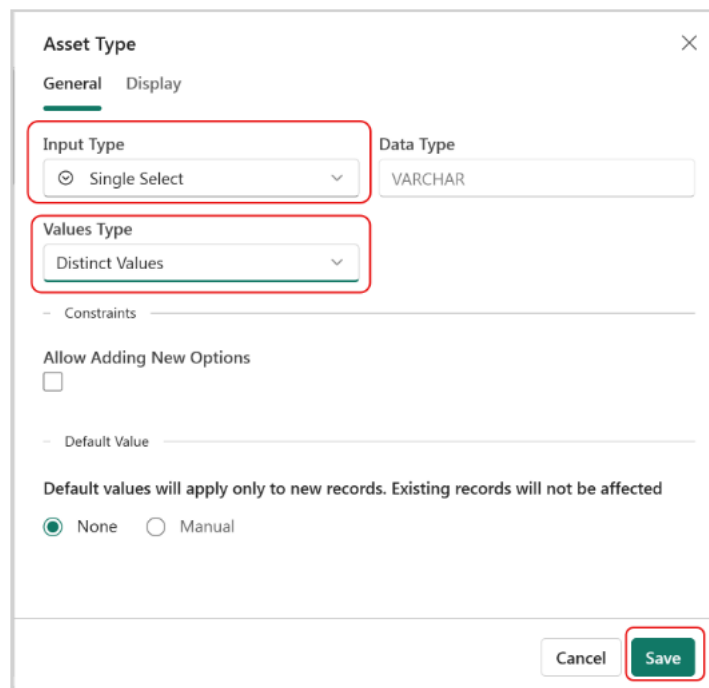
7. Format the Asset Type and Status columns

- I. Hover over the **Asset Type** column, click on the ellipsis “...” button in the column header, and then select **Edit**.



	Asset Tag	Asset ...	Asset URL	Manufacturer
☐	IT-1245	Laptop		
☐	IT-1246	Desktop		
☐	IT-1247	Desktop		
☐	IT-1248	Laptop		
☐	IT-1249	Laptop		
☐	IT-1250	Desktop		
☐	IT-1251	Laptop		
☐	IT-1252	Desktop		
☐	IT-1253	Laptop		
☐	IT-1254	Laptop		

- II. Change **Input Type** to **Single Select** and change **Values Type** to **Distinct Values**. Click the **Save** button



Asset Type

General Display

Input Type: Single Select

Data Type: VARCHAR

Values Type: Distinct Values

Constraints

Allow Adding New Options: ☐

Default Value

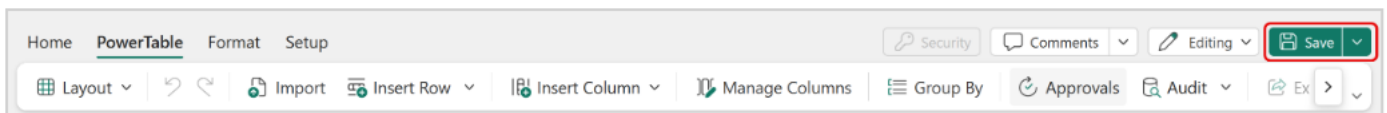
Default values will apply only to new records. Existing records will not be affected

☒ None ☐ Manual

Cancel Save

- III. Repeat the previous 2 steps for the **Status** column.

- IV. Click the **Save** button in the toolbar.



- V. Your **Assets** sheet should now look like this:

Home PowerTable **Format** Setup

Auto Fit Appearance **Format Rules** 26

Assets

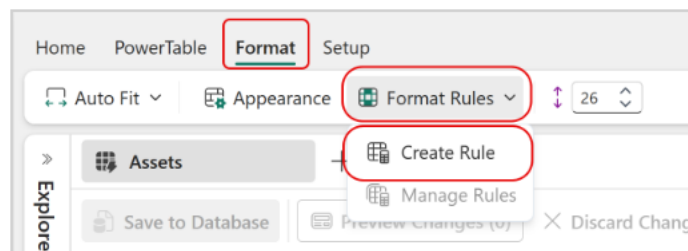
Save to Database Preview Changes (0) Discard Changes Find and Replace Sort By Filter by keyword

Asset Tag	Asset Type	Logo	Manufacturer	Model	Features	Assigned To	Location	Status	Serial Number	Purchase Date	Warranty Exp...	Expect
IT-1245	Laptop		Apple	MacBook Air M1	OS: macOS Big Sur		2	Retired	SN-202500046	08/24/2023	08/23/2026	
IT-1246	Desktop		Apple	iMac 24	OS: macOS Big Sur		3	Retired	SN-202500044	08/25/2023	08/24/2026	
IT-1247	Desktop		Lenovo	ThinkCentre M720	OS: Windows 10 Pro		2	Retired	SN-202500027	09/15/2023	09/14/2026	
IT-1248	Laptop		Lenovo	IdeaPad Flex 5	OS: Windows 11 Pro		2	In Use	SN-202500097	09/15/2023	09/14/2026	
IT-1249	Laptop		Apple	MacBook Pro 13	OS: macOS Monterey		1	Available	SN-202500036	09/17/2023	09/16/2026	
IT-1250	Desktop		Dell	Vostro 3681	OS: Windows 10 Pro		3	In Use	SN-202500068	09/29/2023	09/28/2026	
IT-1251	Laptop		Apple	MacBook Air M1	OS: macOS Big Sur		4	In Use	SN-202500045	09/30/2023	09/29/2026	
IT-1252	Desktop		Apple	iMac 24	OS: macOS Monterey		1	Available	SN-202500100	10/02/2023	10/01/2026	
IT-1253	Laptop		Dell	Inspiron 15	OS: Windows 11 Pro		1	Under Maintena...	SN-202500011	10/04/2023	10/03/2026	
IT-1254	Laptop		Lenovo	ThinkPad X1 Carbon	OS: Windows 11 Pro		5	In Use	SN-202500074	10/04/2023	10/03/2026	
IT-1255	Desktop		Lenovo	ThinkCentre M720	OS: Windows 10 Pro		2	Retired	SN-202500076	10/08/2023	10/07/2026	
IT-1256	Desktop		Apple	iMac 24	OS: macOS Big Sur		6	In Use	SN-202500091	10/18/2023	10/17/2026	
IT-1257	Laptop		Apple	MacBook Pro 13	OS: macOS Big Sur		7	In Use	SN-202500095	10/31/2023	10/30/2026	
IT-1258	Desktop		Lenovo	ThinkCentre M720	OS: Windows 11 Pro		1	Available	SN-202500012	11/24/2023	11/23/2026	
IT-1259	Laptop		Lenovo	ThinkPad X1 Carbon	OS: Windows 10 Pro		1	Under Maintena...	SN-202500059	12/07/2023	12/06/2026	
IT-1260	Desktop		Lenovo	Legion T5	OS: Windows 10 Pro		8	In Use	SN-202500037	12/14/2023	12/13/2026	
IT-1261	Desktop		Dell	Vostro 3681	OS: Windows 11 Pro		9	In Use	SN-202500070	12/19/2023	12/18/2026	
IT-1262	Laptop		Apple	MacBook Pro 16	OS: macOS Ventura		10	In Use	SN-202500099	12/27/2023	12/26/2026	

Session ready Rows: 99 Columns: 17 assets Refresh

8. Create a Conditional Formatting rule for Retired Assets

- I. Click on the **Format** tab in the toolbar, click the **Format Rules** dropdown and select **Create Rule**.



- II. Configure the Create Formatting Rule dialog and the click the Apply button.

- a. **Title:** enter *Retired*
- b. **Apply To:** select *Rows*
- c. **Condition If:** select *Status*, select *Is*, select *Retired*
- d. **Style:** select *Italics*, select *gray* for Fill Color, and select *red* for Font Color

← Create Formatting Rule

×

Title

Retired

^ Filter

Apply To

Rows

Condition If

+ Add Rule

Status

is

Retired

🗑️

^ Rule Highlight

Style

B

I

🎨

🔴

🔄

Cancel

Apply

III. Click the X to close the Manage Rule dialog.

Manage Rule

×

Retired

Rows | <Value>

✎

📄

🗑️

🔴

IV. Click the Save button in the toolbar.

Home

PowerTable

Format

Setup

Security

Comments

Editing

Save

Layout

↶

↷

Import

Insert Row

Insert Column

Manage Columns

Group By

Approvals

Audit

Ex

>

V. Your Assets sheet should now look like this:

Home PowerTable **Format** Setup

Auto Fit Appearance Format Rules 26

Assets

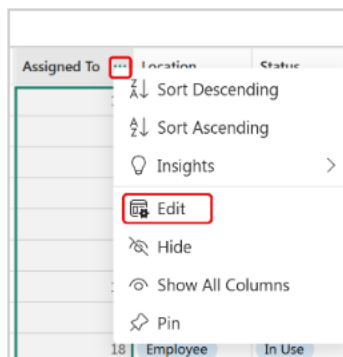
Save to Database Preview Changes (0) Discard Changes Find and Replace Sort By Filter by keyword

Asset Tag	Asset Type	Logo	Manufacturer	Model	Features	Assigned To	Location	Status	Serial Number	Purchase Date	Warranty Exp...	Expect
IT-1245	Laptop		Apple	MacBook Air M1	OS: macOS Big Sur			Retired	SN-202500046	08/24/2023	08/23/2026	
IT-1246	Desktop		Apple	iMac 24	OS: macOS Big Sur	3		Retired	SN-202500044	08/25/2023	08/24/2026	
IT-1247	Desktop		Lenovo	ThinkCentre M720	OS: Windows 10 Pro			Retired	SN-202500027	09/15/2023	09/14/2026	
IT-1248	Laptop		Lenovo	IdeaPad Flex 5	OS: Windows 11 Pro	2	1	In Use	SN-202500097	09/15/2023	09/14/2026	
IT-1249	Laptop		Apple	MacBook Pro 13	OS: macOS Monterey			Available	SN-202500036	09/17/2023	09/16/2026	
IT-1250	Desktop		Dell	Vostro 3681	OS: Windows 10 Pro	3	23	In Use	SN-202500068	09/29/2023	09/28/2026	
IT-1251	Laptop		Apple	MacBook Air M1	OS: macOS Big Sur	4	3	In Use	SN-202500045	09/30/2023	09/29/2026	
IT-1252	Desktop		Apple	iMac 24	OS: macOS Monterey		1	Available	SN-202500100	10/02/2023	10/01/2026	
IT-1253	Laptop		Dell	Inspiron 15	OS: Windows 11 Pro		1	Under Maintena...	SN-202500011	10/04/2023	10/03/2026	
IT-1254	Laptop		Lenovo	ThinkPad X1 Carbon	OS: Windows 11 Pro	5	3	In Use	SN-202500074	10/04/2023	10/03/2026	
IT-1255	Desktop		Lenovo	ThinkCentre M720	OS: Windows 10 Pro		2	Retired	SN-202500076	10/08/2023	10/07/2026	
IT-1256	Desktop		Apple	iMac 24	OS: macOS Big Sur	6	8	In Use	SN-202500091	10/18/2023	10/17/2026	
IT-1257	Laptop		Apple	MacBook Pro 13	OS: macOS Big Sur	7	3	In Use	SN-202500095	10/31/2023	10/30/2026	
IT-1258	Desktop		Lenovo	ThinkCentre M720	OS: Windows 11 Pro		1	Available	SN-202500012	11/24/2023	11/23/2026	
IT-1259	Laptop		Lenovo	ThinkPad X1 Carbon	OS: Windows 10 Pro		1	Under Maintena...	SN-202500059	12/07/2023	12/06/2026	
IT-1260	Desktop		Lenovo	Legion T5	OS: Windows 10 Pro	8	10	In Use	SN-202500037	12/14/2023	12/13/2026	
IT-1261	Desktop		Dell	Vostro 3681	OS: Windows 11 Pro	9	17	In Use	SN-202500070	12/19/2023	12/18/2026	
IT-1262	Laptop		Apple	MacBook Pro 16	OS: macOS Ventura	10	3	In Use	SN-202500099	12/27/2023	12/26/2026	

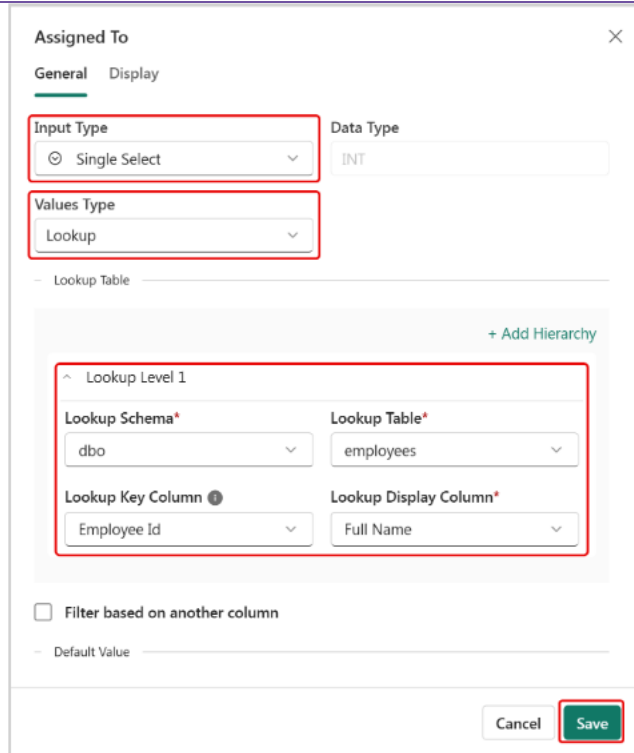
Session ready Rows: 99 Columns: 17 assets Refresh 100 %

9. Configure Lookup Values for the “Assigned To” & “Location” columns

- Hover over the **Assigned To** column, click on the ellipsis “...” button in the column header, and then select **Edit**.



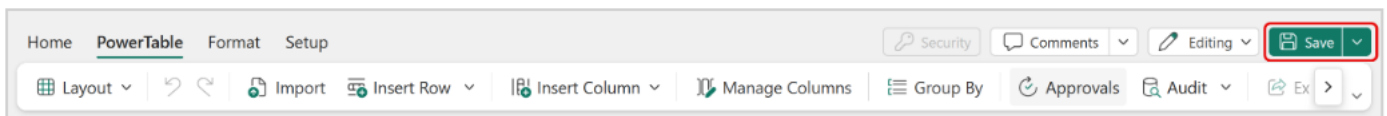
- Configure the **Assigned To** dialog with the following values and then click the **Save** button.
 - Input Type:** select *Single Select*
 - Values Type:** select *Lookup*
 - Lookup Schema:** select *dbo*
 - Lookup Table:** select *employees*
 - Lookup Key Column:** select *Employee Id*
 - Lookup Display Column:** select *Full Name*



III. Repeat the previous 2 steps for the **Location** column. Configure the Location dialog with the following values and then click the **Save** button.

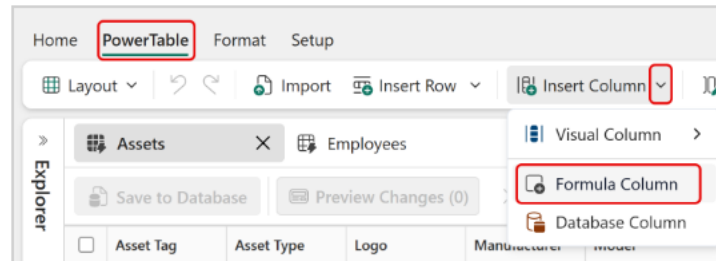
- Input Type:** select *Single Select*
- Values Type:** select *Lookup*
- Lookup Schema:** select *dbo*
- Lookup Table:** select *locations*
- Lookup Key Column:** select *Location Id*
- Lookup Display Column:** select *Location*

IV. Click the **Save** button in the toolbar.



10. Add a new Formula Column to calculate End-of-Life Date

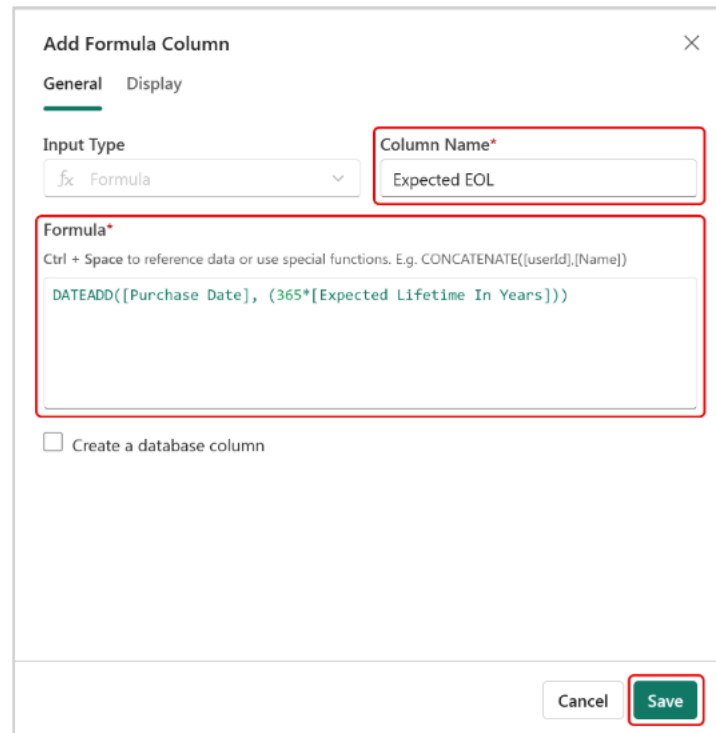
- I. In the **PowerTable** ribbon, click **Insert Column** dropdown, and then select **Formula Column**.



- II. Configure the **Add Formula Column** dialog with the following values and then click the **Save** button.

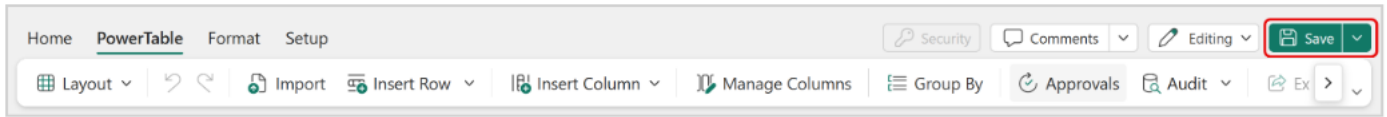
- a. **Column Name:** enter *Expected EOL Date*
- b. **Formula:** configure the formula to look as follows:
 - i **DATEADD**([Purchase Date], (365*[Expected Lifetime In Years]))

NOTE: Do **NOT** try to copy and paste the formula. It will **NOT** work. You must manually type in the formula due to the way that PowerTable references columns behind the scenes

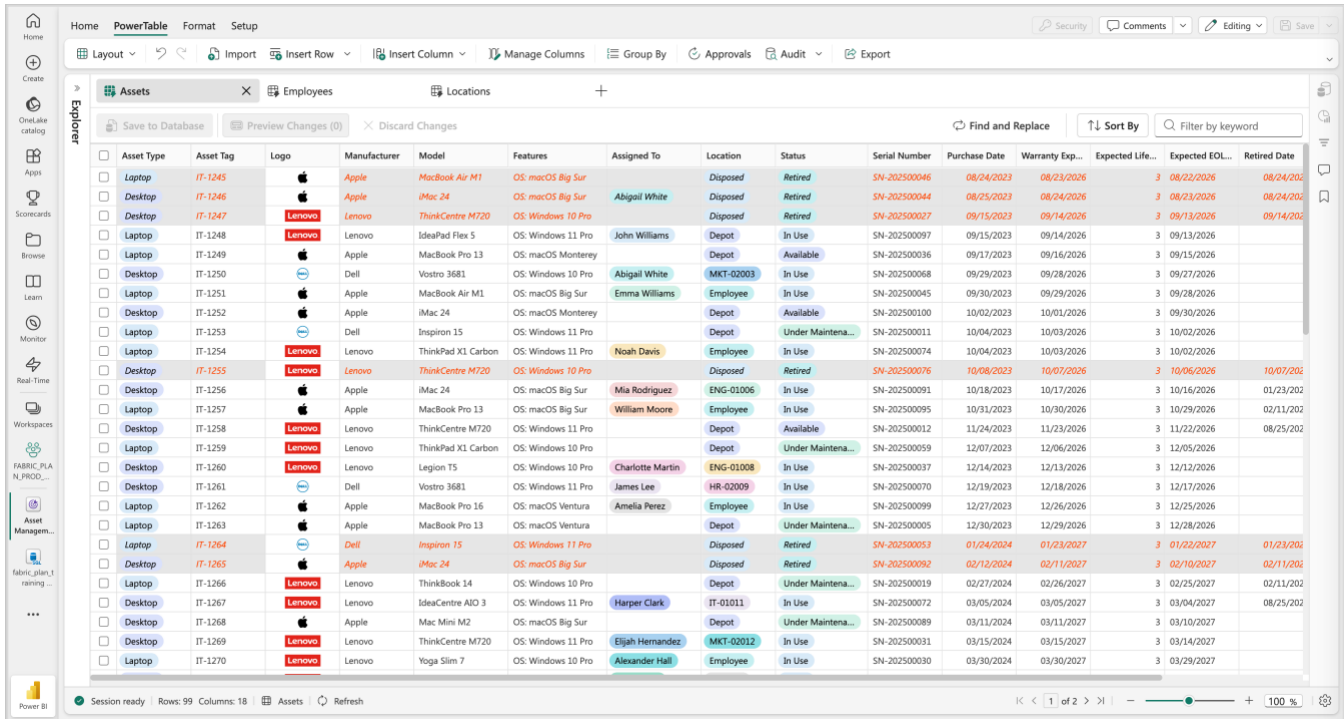


The screenshot shows the 'Add Formula Column' dialog box. The 'General' tab is selected. The 'Input Type' is set to 'Formula'. The 'Column Name*' field contains 'Expected EOL'. The 'Formula*' field contains the formula: `DATEADD([Purchase Date], (365*[Expected Lifetime In Years]))`. The 'Create a database column' checkbox is unchecked. The 'Save' button is highlighted with a red box.

III. Click the **Save** button in the toolbar.



IV. Your **Assets** sheet should now look like this:



Asset Type	Asset Tag	Logo	Manufacturer	Model	Features	Assigned To	Location	Status	Serial Number	Purchase Date	Warranty Exp...	Expected Life...	Expected EOL...	Retired Date
Laptop	IT-1245		Apple	MacBook Air M1	OS: macOS Big Sur		Disposed	Retired	SN-202500046	08/24/2023	08/23/2026	3	08/22/2026	08/24/2026
Desktop	IT-1246		Apple	iMac 24	OS: macOS Big Sur	Abigail White	Disposed	Retired	SN-202500044	08/25/2023	08/24/2026	3	08/23/2026	08/24/2026
Desktop	IT-1247		Lenovo	ThinkCentre M720	OS: Windows 10 Pro		Disposed	Retired	SN-202500027	09/15/2023	09/14/2026	3	09/13/2026	09/14/2026
Laptop	IT-1248		Lenovo	IdeaPad Flex 5	OS: Windows 11 Pro	John Williams	Depot	In Use	SN-202500097	09/15/2023	09/14/2026	3	09/13/2026	
Laptop	IT-1249		Apple	MacBook Pro 13	OS: macOS Monterey		Depot	Available	SN-202500036	09/17/2023	09/16/2026	3	09/15/2026	
Desktop	IT-1250		Dell	Vostro 3681	OS: Windows 10 Pro	Abigail White	MKT-02003	In Use	SN-202500068	09/29/2023	09/28/2026	3	09/27/2026	
Laptop	IT-1251		Apple	MacBook Air M1	OS: macOS Big Sur	Emma Williams	Employee	In Use	SN-202500045	09/30/2023	09/29/2026	3	09/28/2026	
Desktop	IT-1252		Apple	iMac 24	OS: macOS Monterey		Depot	Available	SN-202500100	10/02/2023	10/01/2026	3	09/30/2026	
Laptop	IT-1253		Dell	Inspiron 15	OS: Windows 11 Pro		Depot	Under Maintena...	SN-202500011	10/04/2023	10/03/2026	3	10/02/2026	
Laptop	IT-1254		Lenovo	ThinkPad X1 Carbon	OS: Windows 11 Pro	Noah Davis	Employee	In Use	SN-202500074	10/04/2023	10/03/2026	3	10/02/2026	
Desktop	IT-1255		Lenovo	ThinkCentre M720	OS: Windows 10 Pro		Disposed	Retired	SN-202500076	10/08/2023	10/07/2026	3	10/06/2026	10/07/2026
Desktop	IT-1256		Apple	iMac 24	OS: macOS Big Sur	Mia Rodriguez	ENG-01006	In Use	SN-202500091	10/18/2023	10/17/2026	3	10/16/2026	01/23/2027
Laptop	IT-1257		Apple	MacBook Pro 13	OS: macOS Big Sur	William Moore	Employee	In Use	SN-202500095	10/31/2023	10/30/2026	3	10/29/2026	02/11/2027
Desktop	IT-1258		Lenovo	ThinkCentre M720	OS: Windows 11 Pro		Depot	Available	SN-202500012	11/24/2023	11/23/2026	3	11/22/2026	08/25/2027
Laptop	IT-1259		Lenovo	ThinkPad X1 Carbon	OS: Windows 10 Pro		Depot	Under Maintena...	SN-202500059	12/07/2023	12/06/2026	3	12/05/2026	
Desktop	IT-1260		Lenovo	Legion T5	OS: Windows 10 Pro	Charlotte Martin	ENG-01008	In Use	SN-202500037	12/14/2023	12/13/2026	3	12/12/2026	
Desktop	IT-1261		Dell	Vostro 3681	OS: Windows 11 Pro	James Lee	HR-02009	In Use	SN-202500070	12/19/2023	12/18/2026	3	12/17/2026	
Laptop	IT-1262		Apple	MacBook Pro 16	OS: macOS Ventura		Employee	In Use	SN-202500099	12/27/2023	12/26/2026	3	12/25/2026	
Laptop	IT-1263		Apple	MacBook Pro 13	OS: macOS Ventura	Amelia Perez	Depot	Under Maintena...	SN-202500005	12/30/2023	12/29/2026	3	12/28/2026	
Laptop	IT-1264		Dell	Inspiron 15	OS: Windows 11 Pro		Disposed	Retired	SN-202500053	01/24/2024	01/23/2027	3	01/22/2027	01/23/2027
Desktop	IT-1265		Apple	iMac 24	OS: macOS Big Sur		Disposed	Retired	SN-202500092	02/12/2024	02/11/2027	3	02/10/2027	02/11/2027
Laptop	IT-1266		Lenovo	ThinkBook 14	OS: Windows 10 Pro		Depot	Under Maintena...	SN-202500019	02/27/2024	02/26/2027	3	02/25/2027	02/21/2027
Desktop	IT-1267		Lenovo	IdeaCentre AIO 3	OS: Windows 11 Pro	Harper Clark	IT-01011	In Use	SN-202500072	03/05/2024	03/05/2027	3	03/04/2027	08/25/2027
Desktop	IT-1268		Apple	Mac Mini M2	OS: macOS Big Sur		Depot	Under Maintena...	SN-202500089	03/11/2024	03/11/2027	3	03/10/2027	
Desktop	IT-1269		Lenovo	ThinkCentre M720	OS: Windows 11 Pro	Elijah Hernandez	MKT-02012	In Use	SN-202500031	03/15/2024	03/15/2027	3	03/14/2027	
Laptop	IT-1270		Lenovo	Yoga Slim 7	OS: Windows 10 Pro	Alexander Hall	Employee	In Use	SN-202500030	03/30/2024	03/30/2027	3	03/29/2027	

Part 4 Data Management in PowerTable

Explore Row Editing, using single-row edits, the Bulk Editor, the Form Editor and by Importing new data into PowerTable using files

11. Row Editor

- In the **Assets** sheet, make the following changes in the fourth row (Asset Tag: IT-1248)
 - Change **Status** from *In Use* to *Available*.



Asset Type	Asset Tag	Logo	Manufacturer	Model	Features	Assigned To	Location	Status	Serial Number	Purchase Date	Warranty Exp...	Expected Life...	Expected EOL...	Retired Date
Desktop	IT-1247		Lenovo	ThinkCentre M720	OS: Windows 10 Pro		Disposed	Retired	SN-202500027					0
Laptop	IT-1248		Lenovo	IdeaPad Flex 5	OS: Windows 11 Pro	John Williams	Depot	In Use	SN-202500097					0
Laptop	IT-1249		Apple	MacBook Pro 13	OS: macOS Monterey		Depot	In Use						0
Desktop	IT-1250		Dell	Vostro 3681	OS: Windows 10 Pro	Abigail White	MKT-02003							0
Laptop	IT-1251		Apple	MacBook Air M1	OS: macOS Big Sur	Emma Williams	Employee							0
Desktop	IT-1252		Apple	iMac 24	OS: macOS Monterey		Depot							1
Laptop	IT-1253		Dell	Inspiron 15	OS: Windows 11 Pro		Depot							1
Laptop	IT-1254		Lenovo	ThinkPad X1 Carbon	OS: Windows 11 Pro	Noah Davis	Employee							1
Desktop	IT-1255		Lenovo	ThinkCentre M720	OS: Windows 10 Pro		Disposed							1
Desktop	IT-1256		Apple	iMac 24	OS: macOS Big Sur	Mia Rodriguez	ENG-01006							1
Laptop	IT-1257		Apple	MacBook Pro 13	OS: macOS Big Sur	William Moore	Employee	In Use	SN-202500095					1

b. Clear **Assigned To** value by right-clicking on the cell and selecting **Clear Contents**.

☐	Laptop	IT-1248	Lenovo	Lenovo	IdeaPad Flex 5	OS: Windows 11 Pro	John Williams	Depot	Available
☐	Laptop	IT-1249	Apple	Apple	MacBook Pro 13	OS: macOS Monterey			Available
☐	Desktop	IT-1250	Dell	Dell	Vostro 3681	OS: Windows 10 Pro	Abigail White		Use
☐	Laptop	IT-1251	Apple	Apple	MacBook Air M1	OS: macOS Big Sur	Emma Williams		Use
☐	Desktop	IT-1252	Apple	Apple	iMac 24	OS: macOS Monterey			Available
☐	Laptop	IT-1253	Dell	Dell	Inspiron 15	OS: Windows 11 Pro			Under Maintena...
☐	Laptop	IT-1254	Lenovo	Lenovo	ThinkPad X1 Carbon	OS: Windows 11 Pro	Noah Davis		Use

II. Note that when you do, the **Save to Database**, **Preview Changes**, and **Discard Changes** enable. Click the **Save to Database** button.

Assets										
<input checked="" type="button" value="Save to Database"/> Preview Changes (1) Discard Changes										
☐	Asset Type	Asset Tag	Logo	Manufacturer	Model	Features	Assigned To	Location	Status	Se
☐	Laptop	IT-1245	Apple	Apple	MacBook Air M1	OS: macOS Big Sur		Disposed	Retired	ST
☐	Desktop	IT-1246	Apple	Apple	iMac 24	OS: macOS Big Sur	Abigail White	Disposed	Retired	ST
☐	Desktop	IT-1247	Lenovo	Lenovo	ThinkCentre M720	OS: Windows 10 Pro		Disposed	Retired	ST
☐	Laptop	IT-1248	Lenovo	Lenovo	IdeaPad Flex 5	OS: Windows 11 Pro		Depot	Available	ST

Note:

You can use your keyboard or mouse to navigate between the rows and columns. You can also copy and paste values between columns and rows as well as from other applications into the rows.

III. You will be prompted to confirm that you want to save the changes. Check the **Don't show this again** option if you do not want to confirm with every change and then click the **Proceed** button.

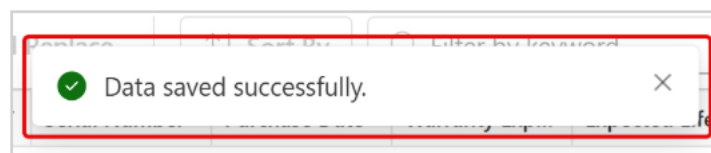
ye	In Use	SN-202500095	10/31/2023	10/30/2026	3	10/29/2026
Av						11/22/2026
Un						12/05/2026
1008	In l					12/12/2026
009	In l					12/17/2026
ye	In l					12/25/2026
Un						12/28/2026
ed	Ret					01/22/2027
ed	Ret					02/10/2027
	Under Maintena...	SN-202500019	02/27/2024	02/26/2027	3	02/25/2027
14						02/24/2027

Save Changes?

Your updates will be applied to the data source. Do you want to proceed?

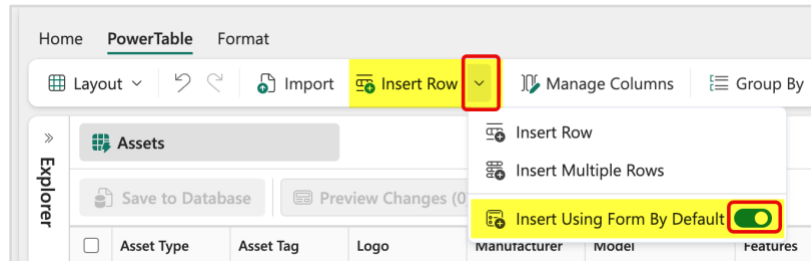
☒ Don't show this again

IV. You will receive **Data saved successfully** toast message when the save is complete and then the page will refresh to reflect the changes. When the save is complete, the **Save to Database**, **Preview Changes** and **Discard Changes** are disabled once again.

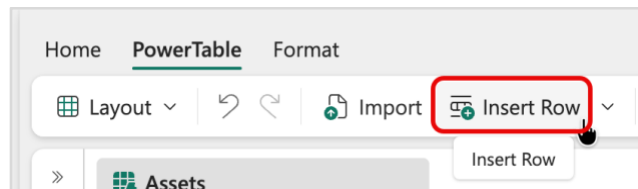


12. Insert a row

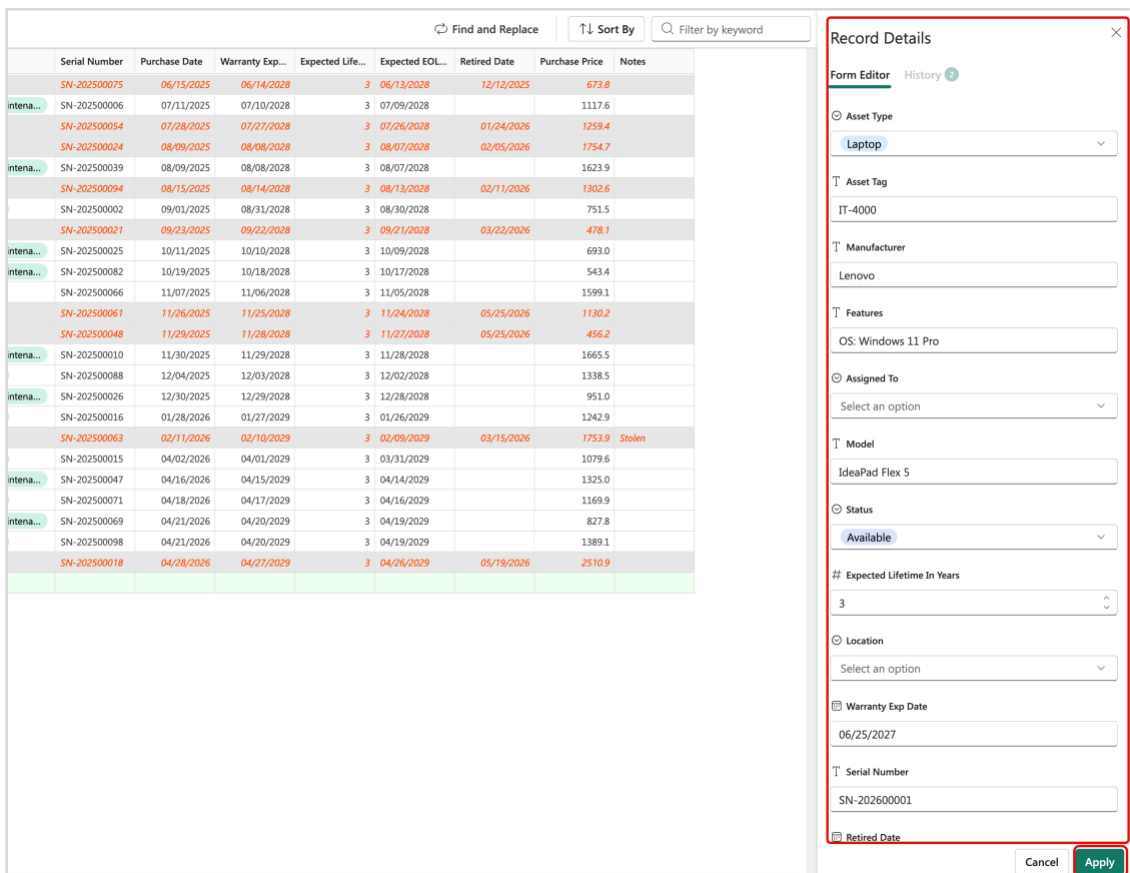
- I. On the Assets sheet, navigate to the **PowerTable** tab on the toolbar. Click on the **arrow** next to **Insert Row** and use the **Toggle Button** next to **Insert Using Form By Default** to enable it.



- II. Now, on the **PowerTable** tab once again, click on the **Insert Row** button (instead of the arrow to bring up the dropdown). This will bring up a form to insert new data.



- III. Enter values for the new row, click the **Apply** button and then click the **Save to Database** button. *Feel free to enter your own values for the new record!*



The screenshot shows the Assets table with columns: Serial Number, Purchase Date, Warranty Exp..., Expected Life..., Expected EOL..., Retired Date, Purchase Price, and Notes. The table contains several rows of data. To the right of the table is the 'Record Details' form, which is highlighted by a red box. The form has tabs for 'Form Editor' and 'History'. It contains fields for: Asset Type (Laptop), Asset Tag (IT-4000), Manufacturer (Lenovo), Features (OS: Windows 11 Pro), Assigned To (Select an option), Model (IdeaPad Flex 5), Status (Available), Expected Lifetime In Years (3), Location (Select an option), Warranty Exp Date (06/25/2027), Serial Number (SN-202600001), and Retired Date. At the bottom of the form are 'Cancel' and 'Apply' buttons.

	Serial Number	Purchase Date	Warranty Exp...	Expected Life...	Expected EOL...	Retired Date	Purchase Price	Notes
	SN-202500075	06/15/2025	06/14/2028	3	06/13/2028	12/12/2025	673.8	
intena...	SN-202500006	07/11/2025	07/10/2028	3	07/09/2028		1117.6	
	SN-202500054	07/28/2025	07/27/2028	3	07/26/2028	01/24/2026	1259.4	
	SN-202500024	08/09/2025	08/08/2028	3	08/07/2028	02/05/2026	1754.7	
intena...	SN-202500039	08/09/2025	08/08/2028	3	08/07/2028		1623.9	
	SN-202500094	08/15/2025	08/14/2028	3	08/13/2028	02/11/2026	1302.6	
	SN-202500002	09/01/2025	08/31/2028	3	08/30/2028		751.5	
	SN-202500021	09/23/2025	09/22/2028	3	09/21/2028	03/22/2026	478.1	
intena...	SN-202500025	10/11/2025	10/10/2028	3	10/09/2028		693.0	
intena...	SN-202500082	10/19/2025	10/18/2028	3	10/17/2028		543.4	
	SN-202500066	11/07/2025	11/06/2028	3	11/05/2028		1599.1	
	SN-202500061	11/26/2025	11/25/2028	3	11/24/2028	05/25/2026	1130.2	
	SN-202500048	11/29/2025	11/28/2028	3	11/27/2028	05/25/2026	456.2	
intena...	SN-202500010	11/30/2025	11/29/2028	3	11/28/2028		1665.5	
	SN-202500088	12/04/2025	12/03/2028	3	12/02/2028		1338.5	
intena...	SN-202500026	12/30/2025	12/29/2028	3	12/28/2028		951.0	
	SN-202500016	01/28/2026	01/27/2029	3	01/26/2029		1242.9	
	SN-202500063	02/11/2026	02/10/2029	3	02/09/2029	03/15/2026	1753.9	Stolen
	SN-202500015	04/02/2026	04/01/2029	3	03/31/2029		1079.6	
intena...	SN-202500047	04/16/2026	04/15/2029	3	04/14/2029		1325.0	
	SN-202500071	04/18/2026	04/17/2029	3	04/16/2029		1169.9	
intena...	SN-202500069	04/21/2026	04/20/2029	3	04/19/2029		827.8	
	SN-202500098	04/21/2026	04/20/2029	3	04/19/2029		1389.1	
	SN-202500018	04/28/2026	04/27/2029	3	04/26/2029	05/19/2026	2510.9	

13. [OPTIONAL] Update a single row using the Form Editor

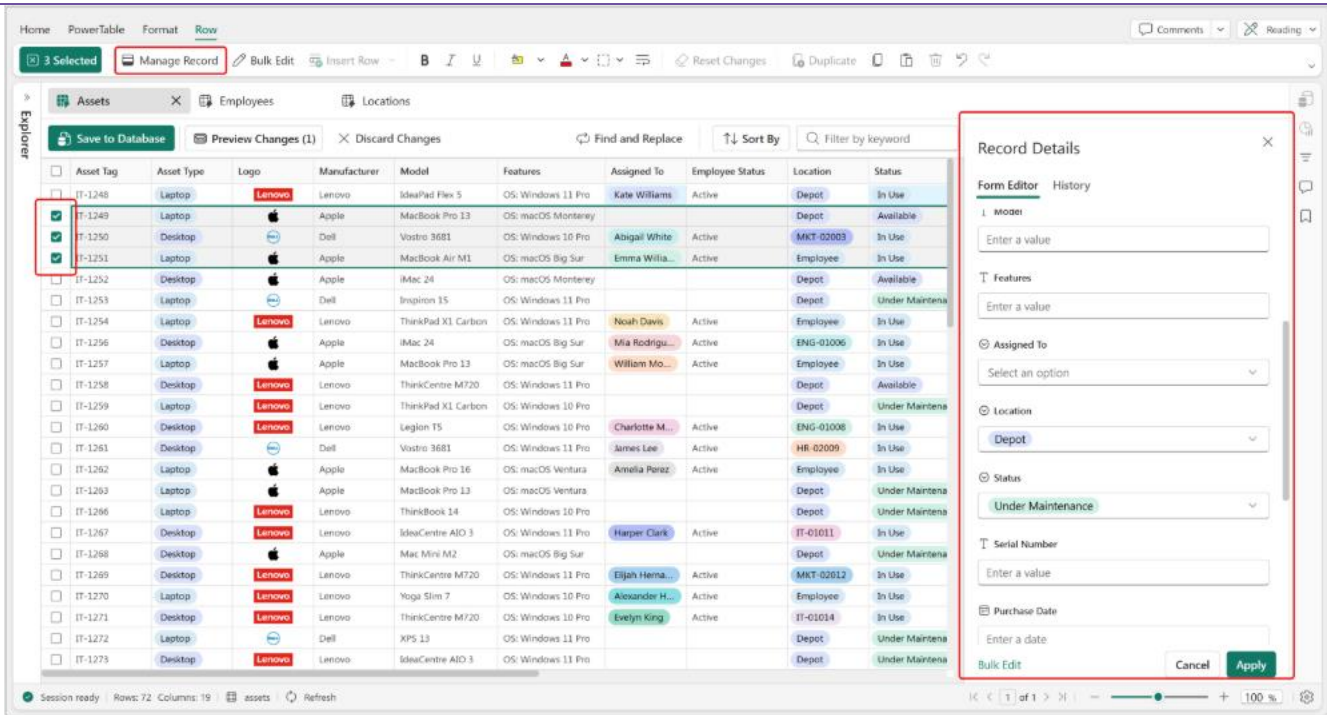
- Check the row selector next to any row and then click **Manage Record** in the toolbar. This will display the **Record Details** side panel with the **Form Editor** enabled. Change the Assigned To column to *Kate Williams* and then change the **Status** to *In Use*. Click the **Apply** button.

- Note that this does not save the change. It creates a pending change that can be combined with other pending changes and saved, previewed, or discarded.

14. [OPTIONAL] Form Editor – multiple row update

Note:
The **Form Editor** behaves differently for single row vs multiple row edits. Only edited fields are replaced across all selected rows in the multiple row Form Editor. Unedited fields remain unchanged.

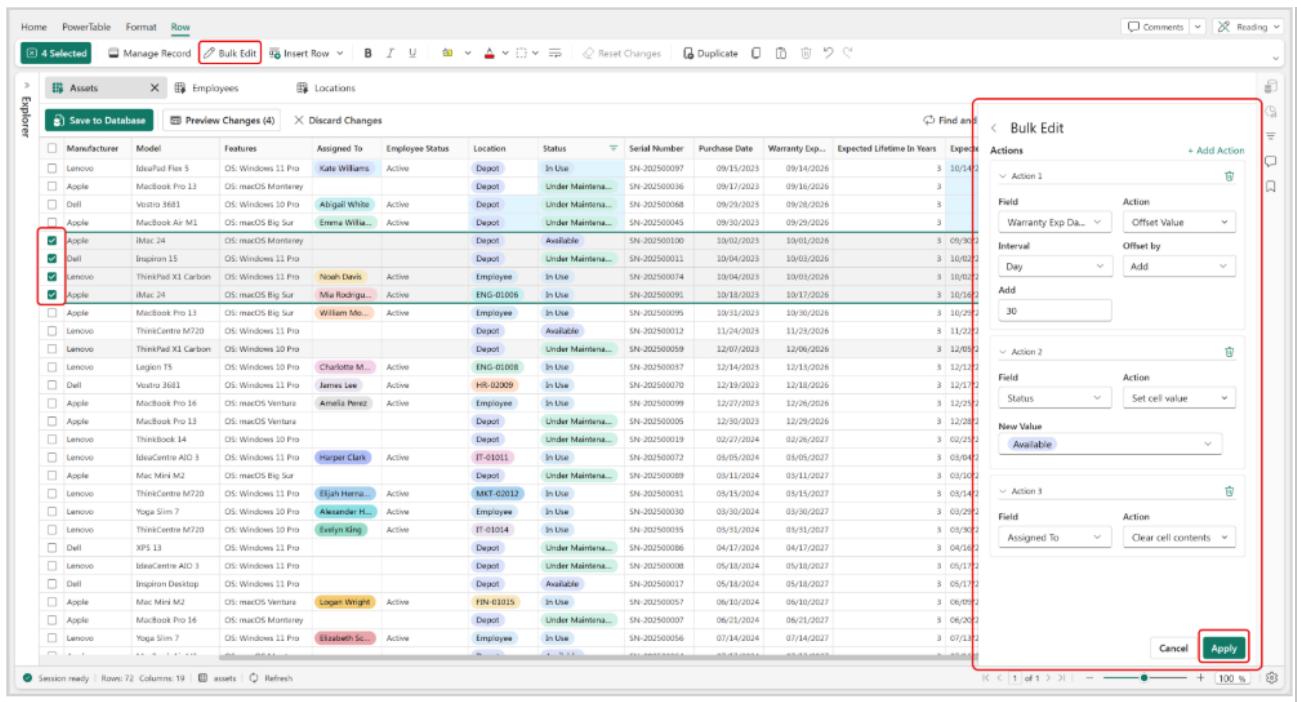
- Check the row selector for multiple rows and then click **Manage Record** in the toolbar. This will display the **Record Details** side panel with the **Form Editor** enabled. Change the **Location** column to *Depot* and then change the **Status** to *Under Maintenance*. Click the **Apply** button.



The screenshot shows the Fabric Plan interface with the 'Assets' table. The 'Bulk Edit' button in the toolbar is highlighted with a red box. The 'Record Details' panel on the right is also highlighted with a red box, showing the 'Form Editor' tab with fields for Model, Features, Assigned To, Location, Status, Serial Number, and Purchase Date.

15. [OPTIONAL] Bulk Editor

- Check the row selector next to the 5th through 8th rows and then click **Bulk Edit** in the toolbar. This will display the **Bulk Edit** side panel with the **Form Editor** enabled. Configure the following actions and click the **Apply** button:



The screenshot shows the Fabric Plan interface with the 'Assets' table. The 'Bulk Edit' button in the toolbar is highlighted with a red box. The 'Bulk Edit' panel on the right is also highlighted with a red box, showing the 'Form Editor' tab with three actions configured: Action 1 (Add 30 days to the current Warranty Exp Date), Action 2 (Set cell value to Available), and Action 3 (Clear cell contents for Assigned To).

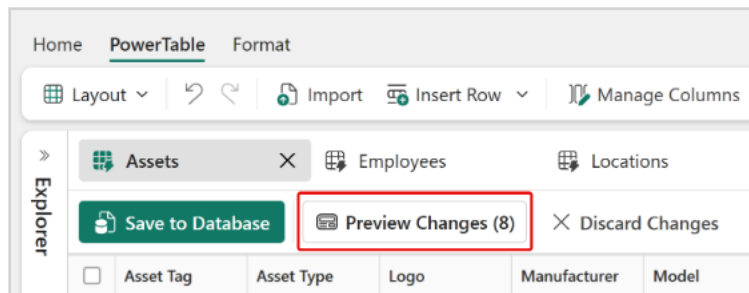
- Action 1 – Add 30 days to the current Warranty Exp Date

- i **Field:** select *Warranty Exp Date*
 - ii **Action:** select *Offset Value*
 - iii **Interval:** select *Day*
 - iv **Offset by:** select *Add*
 - v **Add:** enter *30*
 - vi Click **Add Action**
- b. Action 2 – **Set** the Status to **Available**
- i **Field:** select *Status*
 - ii **Action:** select *Set cell value*
 - iii **New Value:** select *Available*
 - iv Click **Add Action**
- c. Action 2 – Clear the Assigned **To** value
- i **Field:** select *Assigned To*
 - ii **Action:** select *Clear cell contents*

16. [OPTIONAL] Preview changes and Save to Database

The **Preview Changes** and **Discard Changes** buttons will be enabled whenever there is a pending change to the database. You can click on the **Preview Changes** button to view the pending changes or click on the **Discard Changes** button to revert all pending changes.

- I. Click the Preview **Changes** button in the toolbar.



- II. Note that you can select one or more rows and revert the pending changes.

← Back to PowerTable Preview

All (8) + Added (0) Updated (8) Deleted (0) Reset Save to Database

Asset Tag	Asset Type	Logo	Manufacturer	Model	Features	Assigned To	Employee Status	Location	Status	Serial Number	Purchase Date	Warranty Exp.
☒ IT-1248	Laptop		Lenovo	IdeaPad Flex 5	OS: Windows 11 Pro	John Williams Kate Williams	Active	Depot	Available In Use	SN-202500097	09/15/2023	09/14/202
☒ IT-1249	Laptop		Apple	MacBook Pro 13	OS: macOS Monterey			Depot	Available Under Maintena...	SN-202500036	09/17/2023	09/16/202
☒ IT-1250	Desktop		Dell	Vostro 3681	OS: Windows 10 Pro	Abigail White	Active	MKT-02003 Depot	In-Use Under Maintena...	SN-202500068	09/29/2023	09/28/202

- III. Make sure none of the rows are selected. Click the **Save to Database** button and click the Proceed button if the **Save Changes?** popup presents.

← Back to PowerTable Preview

All (8) + Added (0) Updated (8) Deleted (0) Reset Save to Database

Asset Tag	Asset Type	Logo	Manufacturer	Model	Features	Assigned To	Employee Status	Location	Status	Serial Number	Purchase Date	Warranty Exp.
☐ IT-1248	Laptop		Lenovo	IdeaPad Flex 5	OS: Windows 11 Pro	John Williams Kate Williams	Active	Depot	Available In Use	SN-202500097	09/15/2023	09/14/202
☐ IT-1249	Laptop		Apple	MacBook Pro 13	OS: macOS Monterey			Depot	Available Under Maintena...	SN-202500036	09/17/2023	09/16/202
☐ IT-1250	Desktop		Dell	Vostro 3681	OS: Windows 10 Pro	Abigail White	Active	MKT-02003 Depot	In-Use Under Maintena...	SN-202500068	09/29/2023	09/28/202
☐ IT-1251	Laptop		Apple	MacBook Air M1	OS: macOS Big Sur	Emma Willia...	Active	Employee Depot	In-Use Under Maintena...	SN-202500045	09/30/2023	09/29/202
☐ IT-1252	Desktop		Apple	iMac 24	OS: macOS Monterey			Depot	Available	SN-202500100	10/02/2023	10/01/202
☐ IT-1253	Laptop		Dell	Inspiron 15	OS: Windows 11 Pro			Depot	Under Maintenance Available	SN-202500011	10/04/2023	10/03/202
☐ IT-1254	Laptop		Lenovo	ThinkPad X1 Carbon	OS: Windows 11 Pro	Noah Davis		Employee	In-Use Available	SN-202500074	10/04/2023	11/02/202
☐ IT-1256	Desktop		Apple	iMac 24	OS: macOS Big Sur	Mia Rodriguez		ENG-01006	In-Use Available	SN-202500091	10/18/2023	10/17/202

Session ready Rows: 72 Columns: 19

17. [OPTIONAL] Find and Replace

PowerTable provides the **Find and Replace** feature to find a specific text or value and its occurrences in the table across one or more columns and replace it with another text or value.

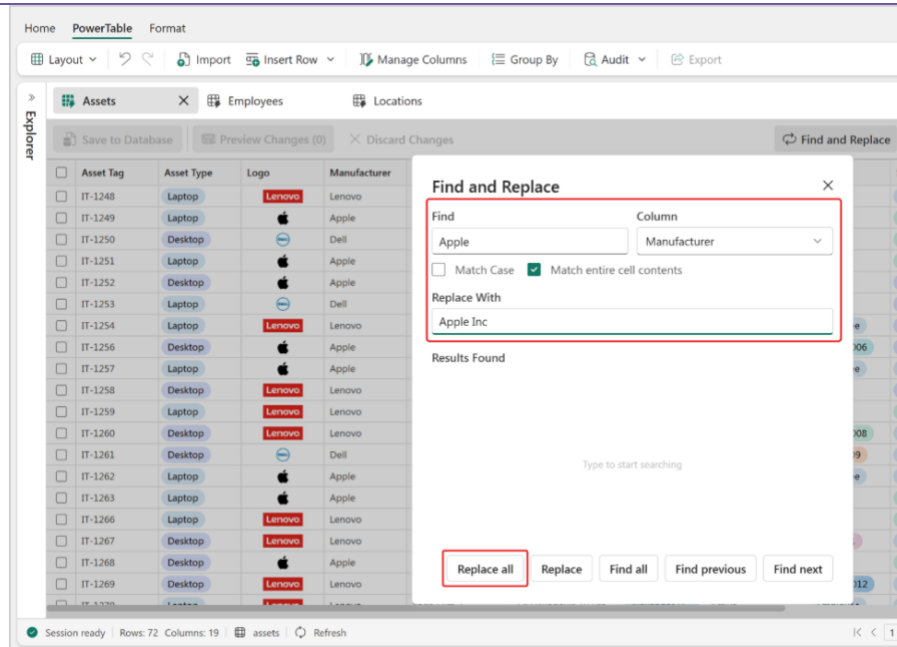
- I. Click the **Find and Replace** button in the toolbar, configure the following inputs and click the **Replace all** button.

Home PowerTable Format

Layout Import Insert Row Manage Columns Group By Audit Export

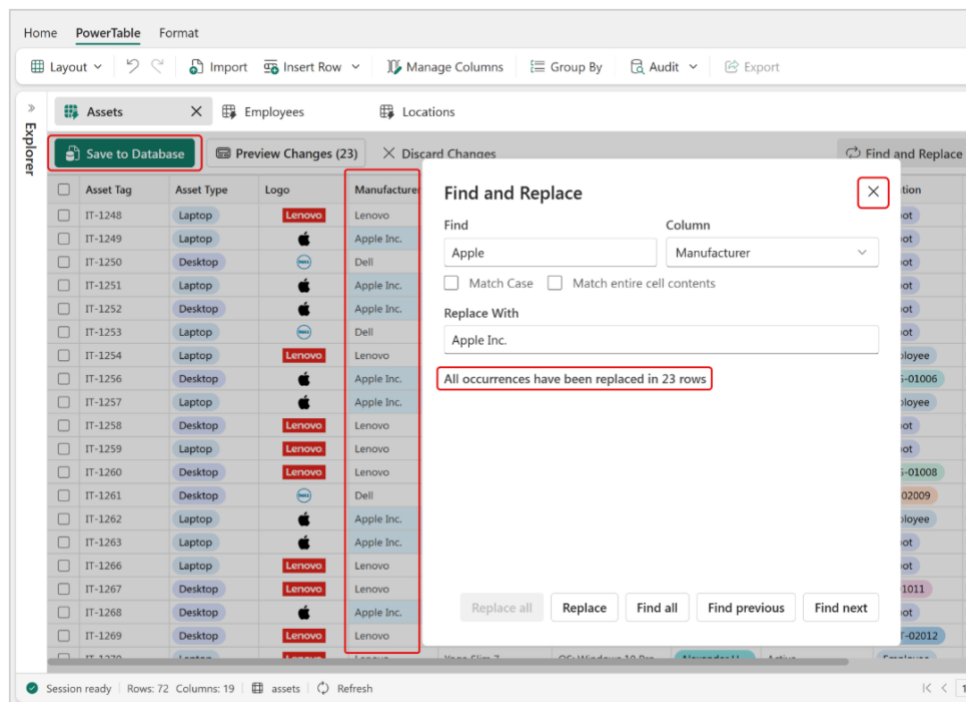
Assets Employees Locations

Save to Database Preview Changes (0) Discard Changes Find and Replace



- a. **Column:** select *Manufacturer*
- b. **Find:** enter *Apple*
- c. Click **Match entire cell contents**
- d. **Replace With:** enter *Apple Inc*

II. Verify that the updates have been made to the **Manufacturer** column. Click the **X** button to close the **Find and Replace** popup and click the **Save to Database** button.



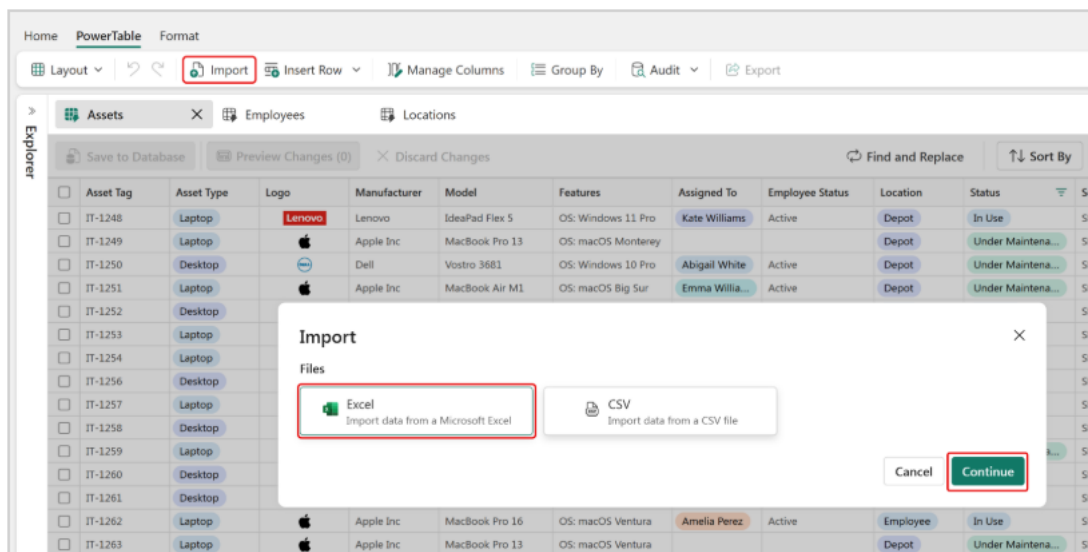
18. Row Editor vs Form Editor vs Bulk Edit vs Find and Replace

The following table lists the features that are supported using the previous methods for editing rows.

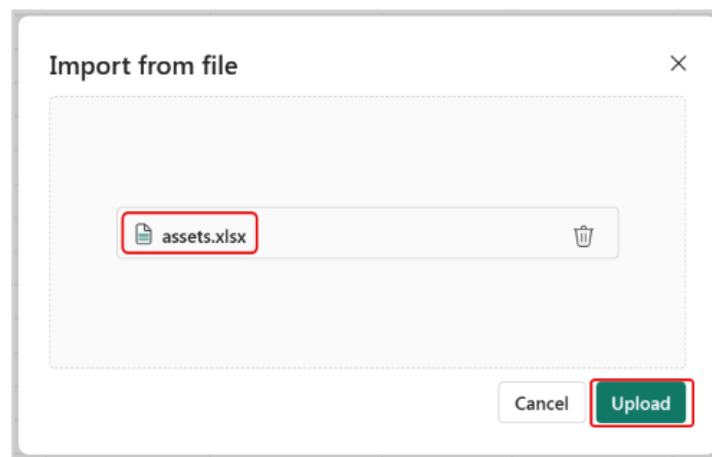
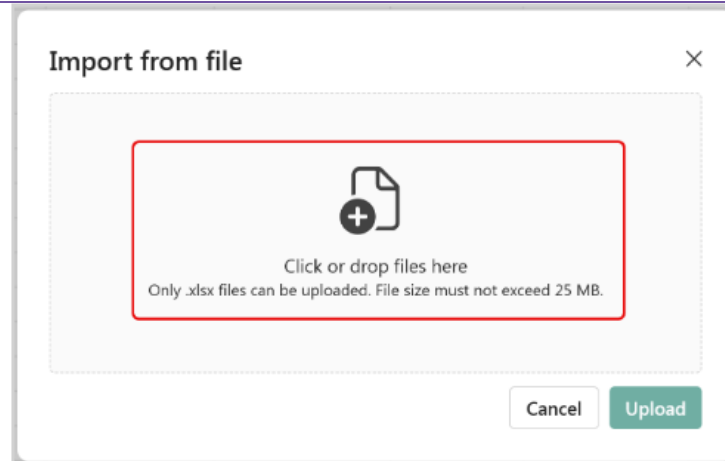
Feature	Row Editor	Form Editor Single Row	Form Editor Multiple Rows	Bulk Edit	Find and Replace
View existing field values	Yes	Yes	No	No	No
Set field value	Yes	Yes	Yes	Yes	Yes
Clear field value	Yes	Yes	No	Yes	Yes
Offset field values (add, subtract, multiple, divide, prefix, suffix)	Yes, manually	No	No	Yes	No
Replace text within existing text	Yes, manually	No	No	No	Yes
Replace a value across multiple rows and columns in a single action	No	No	No	No	Yes
Copy and paste values across multiple rows	Yes	N/A	N/A	N/A	N/A
Fill down values to adjacent rows	Yes	N/A	N/A	N/A	N/A
Preview Changes	Yes	Yes	Yes	Yes	Yes
Discard Changes	Yes	Yes	Yes	Yes	Yes

19. [OPTIONAL] Import new Phones

- I. In the **PowerTable** ribbon in the **Assets** sheet, click the **Import** button, select **Excel**, and click the **Continue** button.



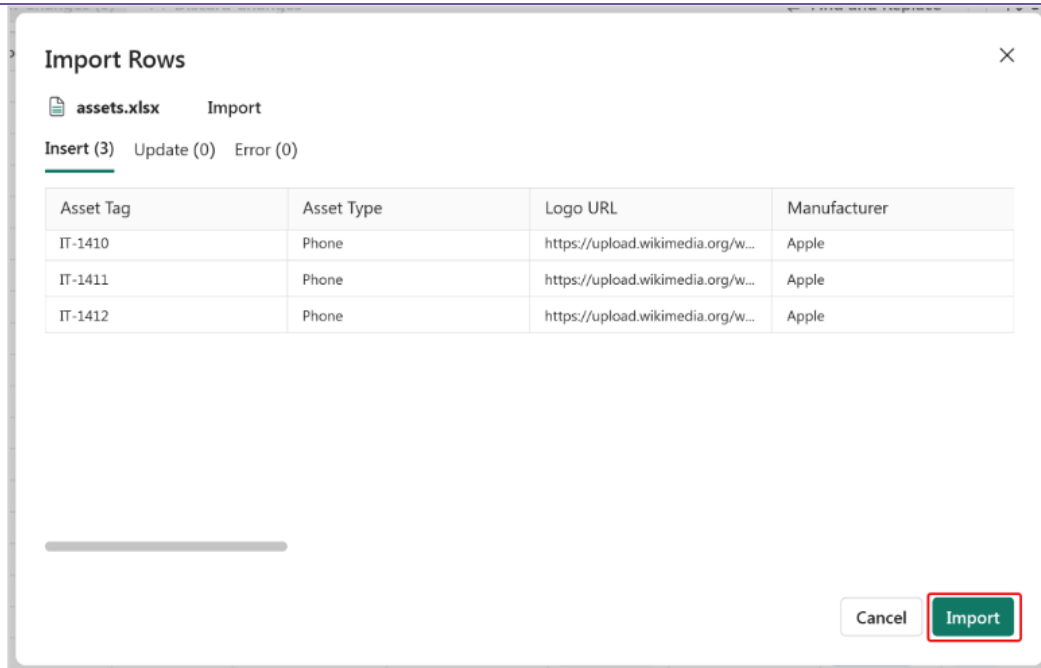
- II. Click to upload assets.xlsx file and the click the **Upload** button:



III. Select the Import sheet and click the **Proceed** button.



IV. PowerTable scans the file and determines which rows will result in an insert, update or an error. View the results and then click the **Import** button.



Import Rows [X]

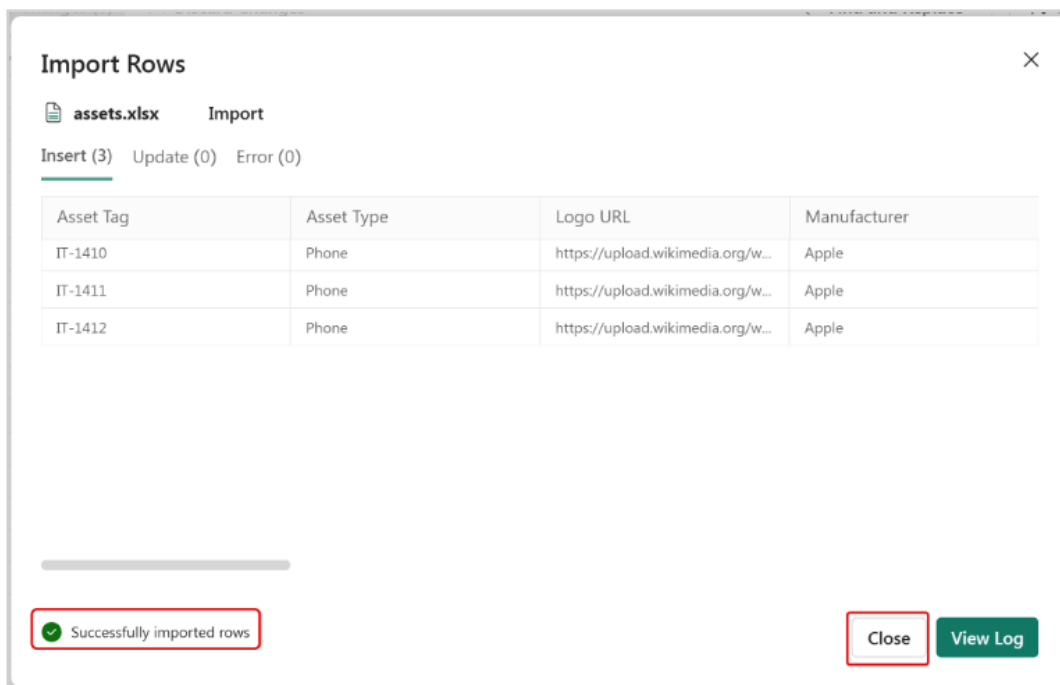
 assets.xlsx Import

Insert (3) Update (0) Error (0)

Asset Tag	Asset Type	Logo URL	Manufacturer
IT-1410	Phone	https://upload.wikimedia.org/w...	Apple
IT-1411	Phone	https://upload.wikimedia.org/w...	Apple
IT-1412	Phone	https://upload.wikimedia.org/w...	Apple

[Cancel] **Import**

V. Click the **Close** button when you receive the **Successfully imported rows** message.



Import Rows [X]

 assets.xlsx Import

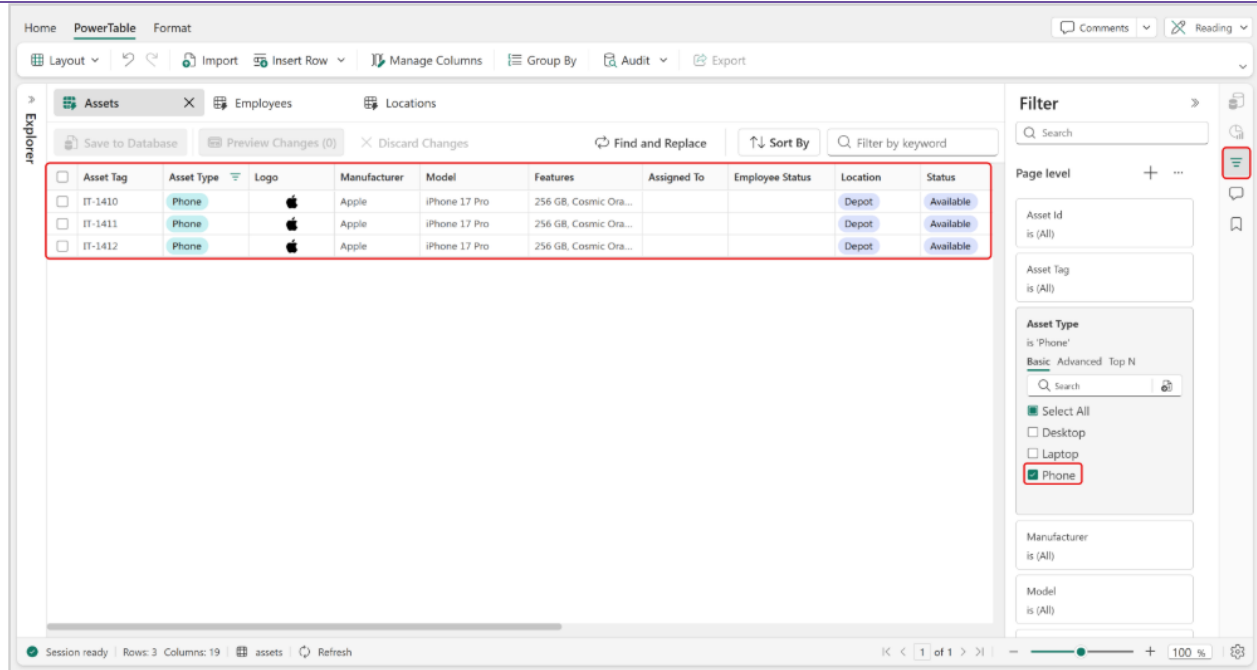
Insert (3) Update (0) Error (0)

Asset Tag	Asset Type	Logo URL	Manufacturer
IT-1410	Phone	https://upload.wikimedia.org/w...	Apple
IT-1411	Phone	https://upload.wikimedia.org/w...	Apple
IT-1412	Phone	https://upload.wikimedia.org/w...	Apple

 Successfully imported rows

Close View Log

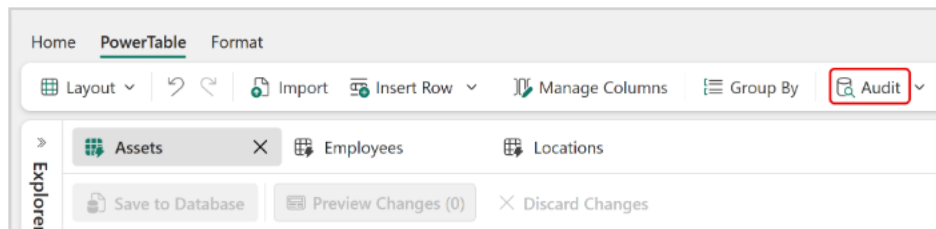
VI. Expand the **Filter** panel, select *Phone* to filter **Asset Type**, and view the newly imported phone records.



Asset Tag	Asset Type	Logo	Manufacturer	Model	Features	Assigned To	Employee Status	Location	Status
IT-1410	Phone		Apple	iPhone 17 Pro	256 GB, Cosmic Ora...			Depot	Available
IT-1411	Phone		Apple	iPhone 17 Pro	256 GB, Cosmic Ora...			Depot	Available
IT-1412	Phone		Apple	iPhone 17 Pro	256 GB, Cosmic Ora...			Depot	Available

20. [OPTIONAL] Audit

- I. In the **PowerTable** ribbon in the **Assets** sheet, click **Audit**.



- II. In the Data tab, scroll and view the insert, update and delete actions made during this session. Note the ability to **Download Logs**, quick filter by **User** and **Time Period**, **Search**, and create custom **Filters**.

← Back to PowerTable Audit

Data (46) Access (0) Refresh Download Logs Revert Changes

All Users Last 24 Hours Search Filter

Row Id	Action	Transaction ID	Source Type	Modified Column	Old Value	New Value	Updated At	Updated By	Approved By
103	Insert	JB178008576310542	BULK_IMPORT	-	-	View Records	05/29/2026 16:16		-
102	Insert	JB178008576310542	BULK_IMPORT	-	-	View Records	05/29/2026 16:16		-
101	Insert	JB178008576310542	BULK_IMPORT	-	-	View Records	05/29/2026 16:16		-
100	Insert	JB178008416914754	WRITEBACK	-	-	View Records	05/29/2026 15:49		-
97	Update	JB178008154214708	WRITEBACK	Manufacturer	Apple	Apple Inc	05/29/2026 15:05		-
95	Update	JB178008154214708	WRITEBACK	Manufacturer	Apple	Apple Inc	05/29/2026 15:05		-
90	Update	JB178008154214708	WRITEBACK	Manufacturer	Apple	Apple Inc	05/29/2026 15:05		-
80	Update	JB178008154214708	WRITEBACK	Manufacturer	Apple	Apple Inc	05/29/2026 15:05		-
10	Update	JB178007074419928	WRITEBACK	Status	In Use	Available	05/29/2026 12:05		-
9	Update	JB178007074419928	WRITEBACK	Warranty Exp Date	2026-10-03	2026-11-02	05/29/2026 12:05		-
9	Update	JB178007074419928	WRITEBACK	Status	Under Maintenance	Available	05/29/2026 12:05		-
8	Update	JB178007074419928	WRITEBACK	Warranty Exp Date	2026-10-01	2026-10-31	05/29/2026 12:05		-
7	Update	JB178007074419928	WRITEBACK	Location	Employee	Depot	05/29/2026 12:05		-
7	Update	JB178007074419928	WRITEBACK	Status	In Use	Under Maintenance	05/29/2026 12:05		-
6	Update	JB178007074419928	WRITEBACK	Location	MKT-02003	Depot	05/29/2026 12:05		-
6	Update	JB178007074419928	WRITEBACK	Status	In Use	Under Maintenance	05/29/2026 12:05		-
5	Update	JB178007074419928	WRITEBACK	Status	Available	Under Maintenance	05/29/2026 12:05		-
4	Update	JB178007074419928	WRITEBACK	Status	Available	In Use	05/29/2026 12:05		-

Session ready | Rows: 46 | Columns: 19 | 1 of 1 | 100 %

III. In the **Access** tab, scroll and view the changes made to the Row and Column Access security settings made during this session. Note the ability to **Download Logs**, quick filter by **User** and **Time Period**, **Search**, and create custom **Filters**:

← Back to PowerTable Audit

Data (46) Access (24) Refresh Download Logs

All Users Last 7 Days Search Filter

Log ID	Property	Description	Updated By	Updated At
131	Column Access	Updated column Asset Tag		05/27/2026 15:30
130	Row Access	Updated rule type from specific users to all users in the workspace for who can update existing rows		05/27/2026 15:29
129	Row Access	Updated rule name specific_users to specific_users for who can update existing rows		05/27/2026 15:03
128	Row Access	Removed from rule specific_users for who can update existing rows		05/27/2026 15:03
127	Row Access	Added 45a4ff1d-e572-44a7-b4b4-787729e58cc1 into rule specific_users for who can update existing rows		05/27/2026 15:03
126	Row Access	Updated rule name specific_users to specific_users for who can update existing rows		05/27/2026 15:02
125	Row Access	Removed from rule specific_users for who can update existing rows		05/27/2026 15:02
124	Row Access	Added 02357d23-3595-4498-b5db-90f821125092 into rule specific_users for who can update existing rows		05/27/2026 15:02
123	Row Access	Updated rule name specific_users to specific_users for who can update existing rows		05/27/2026 15:02
122	Row Access	Removed from rule specific_users for who can update existing rows		05/27/2026 15:02
121	Row Access	Added 45a4ff1d-e572-44a7-b4b4-787729e58cc1 into rule specific_users for who can update existing rows		05/27/2026 15:02
120	Row Access	Updated rule name specific_users to specific_users for who can update existing rows		05/27/2026 15:00
119	Row Access	Removed from rule specific_users for who can update existing rows		05/27/2026 15:00
118	Row Access	Added bcc0e7af-3da3-48de-94ed-2e00127a63dc into rule specific_users for who can update existing rows		05/27/2026 15:00
117	Row Access	Added rule specific_users with following users 9c6c92a7-98f0-4070-b48a-b767ad04216f for who can update existing rows		05/27/2026 14:59
116	Row Access	Updated rule type from all users in the workspace to specific users for who can update existing rows		05/27/2026 14:59
112	Column Access	Updated column Asset Tag		05/27/2026 10:17

Session ready | Rows: 24 | Columns: 19 | 1 of 1 | 100 %

Outcomes

- ✓ Fabric SQL database created for data management.
- ✓ Fabric Plan Item created with corresponding PowerTable sheets for each Assets, Employees and Locations tables
- ✓ Assets sheet configured and set up with formatted columns, lookups
- ✓ Update and Insert operations executed with different approaches for each