Fabric Plan

E8 Introduction to Intelligence Sheets — FAQs

This FAQ addresses common questions and clarifications that arise while working through the E8 — Introduction to Intelligence Sheets exercise. It covers connecting an Intelligence Sheet to a semantic model, navigating the sheet-level and visual-level interface, configuring the variance chart, trend chart, KPI card, and matrix, and using filters, headers, and commentary.

Part 1 Creating an Intelligence Sheet

1. What's the difference between an Intelligence Sheet and a Planning Sheet?

An Intelligence Sheet is a reporting layer that sits on top of a semantic model, it's built for visualization (charts, matrices, KPI cards, Gantt, filters), not data entry. A Planning Sheet is where plan data actually lives and is edited (inputs, forecasts, writeback). The Intelligence Sheet reads from the same semantic model connected to the Plan app, but doesn't write back to it.

2. Do I need to create a new Plan app for every Intelligence Sheet, or can I add one to an existing Plan app?

Yes. You can create an Intelligence Sheet within the same Plan app. However, in this exercise, the Planning and Intelligence exercises use different semantic models, so you need to repeat the setup steps for the Intelligence Sheet.

3. Does importing the PBIX file publish both a report and a semantic model, or just one of the two?

Both. Importing the PBIX file (Enterprise Dataset ▲) creates two separate items in the workspace: a report and a semantic model, listed side by side. For this exercise, only the semantic model is relevant. You can delete the report if needed.

4. Can I reuse the connection I created in the Planning module, or do I need to create a new one for the Intelligence Sheet?

The existing connection can be reused — the exercise instructs you to use your existing connection created during the Planning module when connecting the semantic model to the new Plan app.

5. What's the difference between choosing "Semantic Model" and "Excel / CSV" on the Get Data screen?

Semantic Model creates a live connection to a published Power BI dataset (like Enterprise Dataset ▲), so the Intelligence Sheet reflects the model as it's refreshed. Excel/CSV instead imports a static file directly.

6. What happens if the "Enterprise Dataset ▲" semantic model doesn't show up when I search for it in the connection dialog?

Use the search option in the connection dialog first. If the semantic model still does not appear, check with your admin to confirm that your workspace has access to the file upload workspace.

Part 2 Exploring the Interface

7. What's the difference between the Intelligence tab on the ribbon and the toolbar that appears above a selected visual?

The Intelligence tab controls sheet-wide, canvas-level settings — Canvas (page size, grid, themes), Elements (shapes, text, buttons), and Edit Interactions. The toolbar that appears when a visual is selected (e.g., the Matrix tab with Quick Format, Totals, Charts, Conditional Formatting) only affects that one visual.

8. What's the difference between a Page-level filter and a Global-level filter?

A Page-level filter only applies to the current Intelligence Sheet. A Global-level filter applies across every sheet in the Plan app. The exercise adds the Year filter at the Global level specifically, so it applies across the whole dashboard, not just this one sheet.

9. Why add the Year filter at the Global level instead of Page level, since this exercise only builds one sheet?

It's set up as a best practice for when the dashboard grows to include more sheets — a Global filter means any sheet added later already respects the same Year selection without reapplying it. With only one sheet in place, a Page-level filter would look identical in this exercise.

10. What's the difference between a Public and a Private bookmark?

Public bookmarks are available to anyone who can view the report, while Private bookmarks are visible only to the person who created them. Viewers can create Private bookmarks and share them with other team members by copying and sharing the bookmark link.

11. Can the same Parameter be reused across multiple Intelligence Sheets in the same Plan app, or is it scoped to one sheet?

It can be used across the entire Plan app.

12. What's a practical use case for a Parameter, beyond storing a target margin percentage?

Parameters help eliminate **hard-coded values** from formulas by storing reusable business inputs in a central location. Instead of embedding values such as growth rates, or exchange rates directly in formulas, reference a parameter so that updating it automatically recalculates all dependent calculations. This makes both **Intelligence Sheets** and **Planning Sheets** easier to maintain, more reusable, and well suited for what-if analysis and scenario modelling.

Part 3 Building the Dashboard

13. Why are both RegionName and CountryName mapped to Category on the variance chart, instead of just one?

Mapping both fields creates a two-level hierarchy — Region as the parent, Country as the child — which is what enables the Drill down and Expand all actions used later in the exercise. Without both fields, there would be nothing to drill into.

14. What's the difference between "Drill down" and "Expand all" on the variance chart?

Drill down lets you move through the hierarchy one level at a time. For example, selecting Drill down moves the chart from Region to Country. Expand all displays all hierarchy levels together, so Region and Country appear at the same time instead of being viewed one level at a time.

15. What's the difference between "Comparison 1 (vs Actuals)" and "Comparison 2 (vs Actuals)" in the variance chart's field well?

They're two independent comparison series plotted against the same Actuals baseline. In this exercise, Comparison 1 is mapped to Forecast and Comparison 2 to Plan, so the chart shows Actuals vs. Forecast and Actuals vs. Plan side by side on the same bars.

16. Why change the scaling to "Thousands" instead of leaving it on the default (Flexible)?

Flexible scaling lets each bar's label format independently, which can look inconsistent on a chart spanning very different magnitudes (e.g., 1.7b vs. 559.4m). Setting it to Thousands standardizes the number format across every bar so labels are easier to compare at a glance.

17. Does changing the Series colour on one bar change just that bar, or the whole measure's series?

Changing the series colour applies to the entire measure series, not just the selected bar. For example, if you change the colour for Actuals, every bar representing Actuals across the chart uses that colour.

18. Why does the KPI card use "Trellis Row" for ProductName instead of adding it as a Category?

Trellis Row tiles the KPI card into a small-multiple layout — one repeated card panel per product — which produces the grid of individual product tiles seen in the exercise. Category would filter or group data within a single card rather than repeating the card itself.

19. On the KPI card, only "Comparison 1 (vs Actuals)" is used (mapped to Plan) — what would "Comparison 2" add if it were also used?

Adding Comparison 2 would allow the KPI card to show a second comparison against Actuals. For example, in addition to comparing Actuals with Plan, you could use Comparison 2 to compare Actuals with Forecast on each product card.

20. **In the Matrix visual, the second value field is labeled "Compare to Prior Period (PY)" but we mapped Plan to it, not a prior-year measure — is that a mislabel, or does it work either way?**

The field name in the UI is generic and can be used to add any additional measure for comparison. While it is commonly used for prior period measures such as Previous Year (PY), it is not limited to them.

21. **Do the Variance and Variance % columns need to be added manually, or does the Matrix generate them automatically once both measures are mapped?**

They're generated automatically but to enable them you need the Matrix toolbar (Show Columns → check Actuals - Plan and (Actuals - Plan)%). They don't turn on by default.

22. **Why do Year and Month appear as separate fields in Columns, but show up as a nested hierarchy in the output?**

This is automatic Matrix behavior — placing both Year and Month in Columns creates a nested hierarchy (Year as the outer grouping, Month nested inside) with no extra configuration needed.

Part 4 Filters, Headers, and Commentary

23. **What's the difference between the Slider, Calendar, and Relative Date filter types?**

Calendar, used here, gives a start/end date picker; Slider is a draggable range control; Relative Date likely offers rolling windows such as "last 30 days," though this isn't demonstrated in the exercise.

24. **Does moving the date filter update every visual on the sheet, or only the one it's positioned near?**

It updates every visual on the sheet. To control the filter you can manage this from edit interactions.

25. **Can a posted comment be edited or deleted afterward?**

Yes, a comment can be edited or deleted.

26. **Does tagging a colleague with @ in a comment send them a notification, similar to the Teams notifications in the Planning module's approval workflow?**

Yes, the tagged employee will receive a notification on Teams.

27. **What's the practical difference between adding a comment at the cell, row, column, or report level?**

A cell-level comment is tied to one specific data point. Row- and column-level comments apply more broadly to that entire row or column of the matrix. A report-level comment applies to the sheet as a whole rather than any specific data point. Whichever level is chosen, the exercise notes that commentary stays context-aware to the filter state active when it was posted.