

E8

Introduction to Intelligence Sheets

~25 min

You are a BI analyst at a SaaS company. Your team has asked you to build an interactive **Enterprise dashboard** using live data from your Fabric Plan semantic model. In this module you will connect to the model, explore the Intelligence Sheet interface, and begin laying the foundations of the dashboard.

An Intelligence Sheet is a canvas-based analysis layer that sits on top of a semantic model, a Planning Sheet, or a PowerTable. It gives you access to a full visualization library — charts, matrices, KPI cards, Gantt charts, and filters — without leaving the Fabric Plan environment.

Part 1

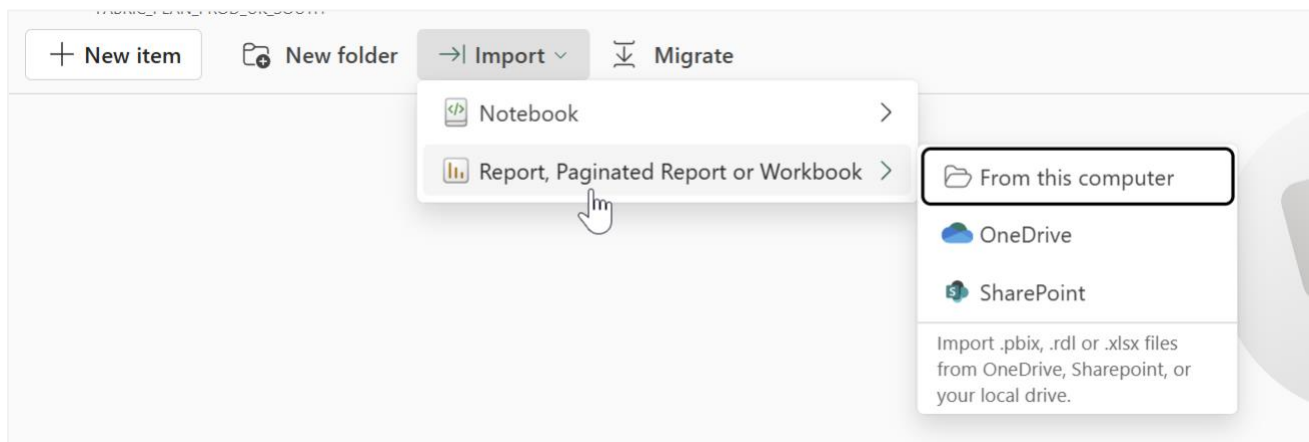
Creating an Intelligence Sheet

~5 min

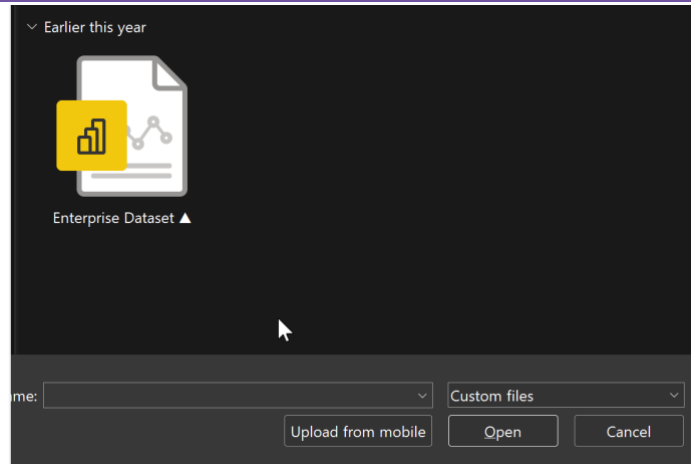
Configure the Intelligence Sheet, insert the KPI card.

1. Import the PBIX file

- i. Go back to the folder you just created. Select Import → Report, Paginated Report or Workbook → From this computer.



- ii. Select the Enterprise Data ▲.pbix file downloaded from Resources and click Open.



- iii. The published report and semantic model are available.

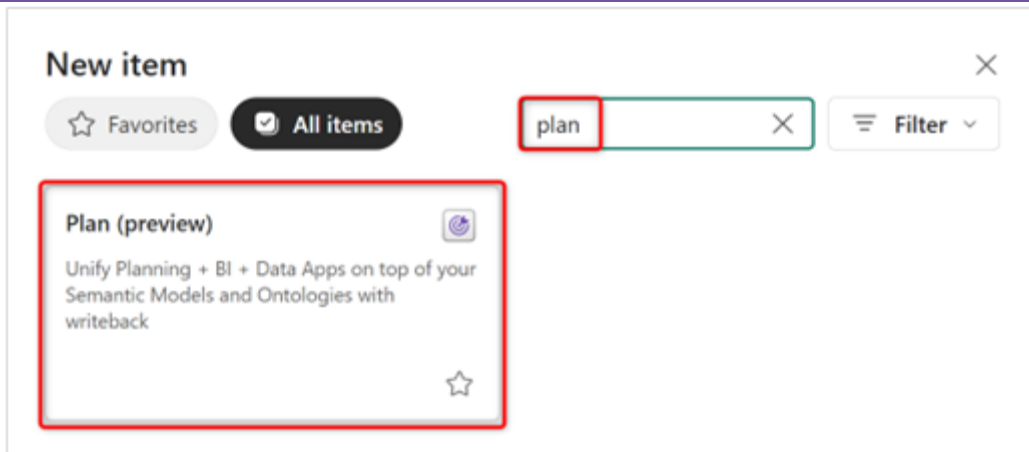
FABRIC_PLAN_PROJECTS > Kevika

	Name	Status	Type	Task
	Enterprise Dataset ▲		Report	—
	Enterprise Dataset ▲		Semantic model	—

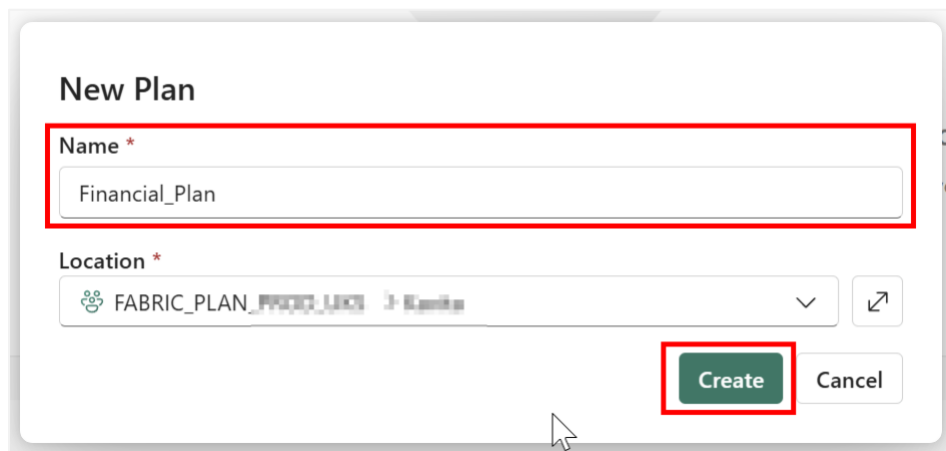
Note: Ensure the resource file given in the training is available in your workspace.

2. Create a new Plan app

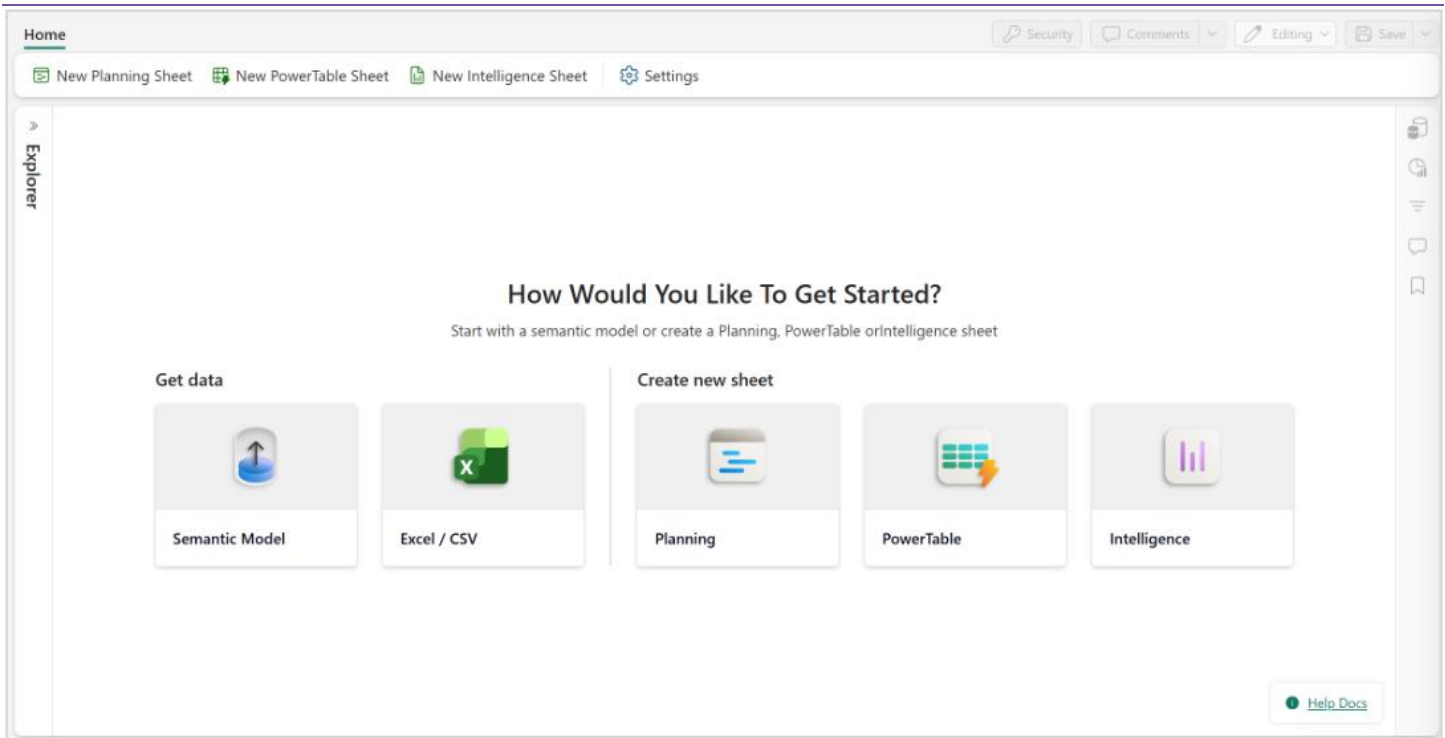
- i. Go back to your folder and click New item.
- ii. In the side panel, search for Plan and select Plan (preview).



- iii. Enter Financial_Plan in the Name field and click Create.

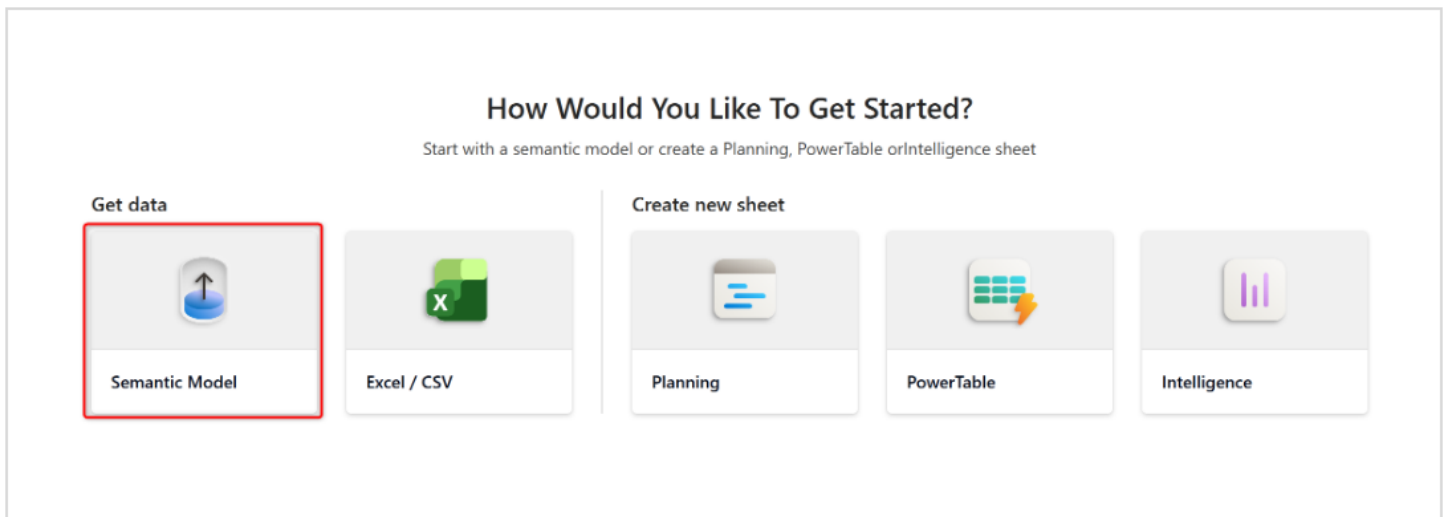


- iv. The Plan app opens, showing the launch screen with two sections: Get data and Create new sheet.



3. Connecting to a Semantic Model

- i. Click Semantic Model on the launch screen.



- ii. Semantic model connection dialog opens. Use your existing connection created during Planning module.
- v. Select Semantic model and Choose the “Enterprise Dataset ▲” semantic model and click Add.

Choose a semantic model

All

Endorsed in your org

My data

Favorites

Filter ▾

All domains ▾

»

FABRIC_PLAN_PROD_UKS_2026JUL

Name	Refreshed	Location	Endorsement	Sensitivity
IBCS Data ▲	6/8/26, 4:41:13 PM	FABRIC_PLAN_PROD...	—	—
Acme Data	4/13/26, 4:13:46 PM	FABRIC_PLAN_PROD...	—	—
Enterprise Dataset ▲	5/19/26, 12:38:22 P...	FABRIC_PLAN_PROD...	—	—
Data Retail Storytelling	4/9/26, 5:16:15 PM	FABRIC_PLAN_PROD...	—	—
Plan Summary	6/10/26, 6:48:29 PM	FABRIC_PLAN_PROD...	—	—

Add

Cancel

vi. Once the connection and semantic model are populated correctly, click Connect.

Select Semantic Model Connection

Connection required A shared cloud connection is required to access and use a semantic model in Planning and BI sheet types.

Select a Connection *
 + Create Connection

Acme Beverages

Semantic Model *

Enterprise Dataset ▲

Cancel
Connect

- vii. The Enterprise dataset tables are now visible in the Data tab on the right — dimensions, measures, and date tables all available for Intelligence.

Semantic model added
×

Create a new Planning sheet or Intelligence sheet to get started.
 Got it

Data
↺
»

Semantic Model ⓘ
 ⚙️

> Measure

 > [Dim] Account

 > [Dim] Business Unit

 > [Dim] Customer Segm...

 > [Dim] Date

 > [Dim] Department

 > [Dim] Geography

 > [Dim] Product

 > [Dim] Scenario

 > [Fact] Financial

 > [Fact] Invoice Line

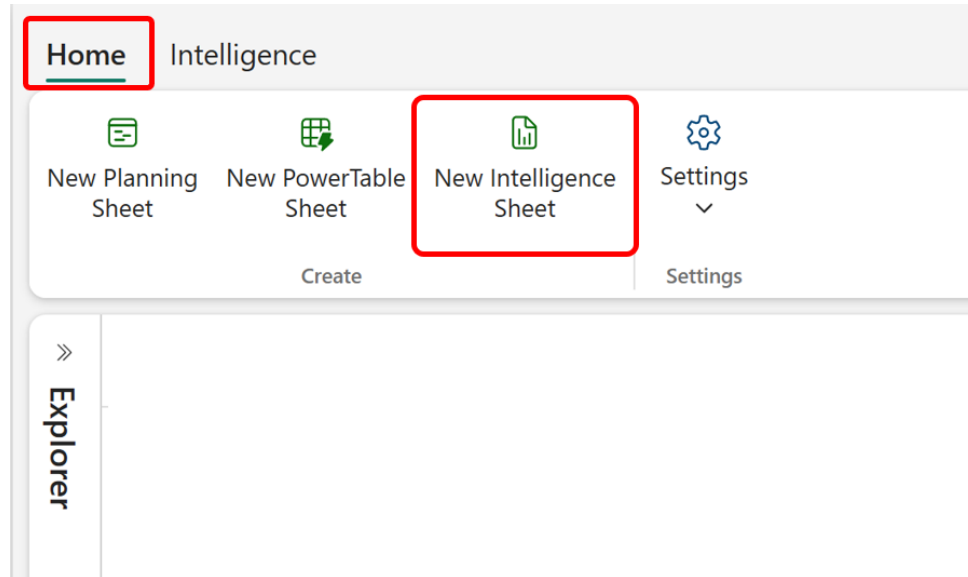
 > [Fact] Operational

 > Para_M_Finance

4. Create a new intelligence sheet

After connecting, from Home tab > select Intelligence sheet.

- i. A dialogue will appear to rename the sheet. By default, Intelligence sheet 1 will be created.



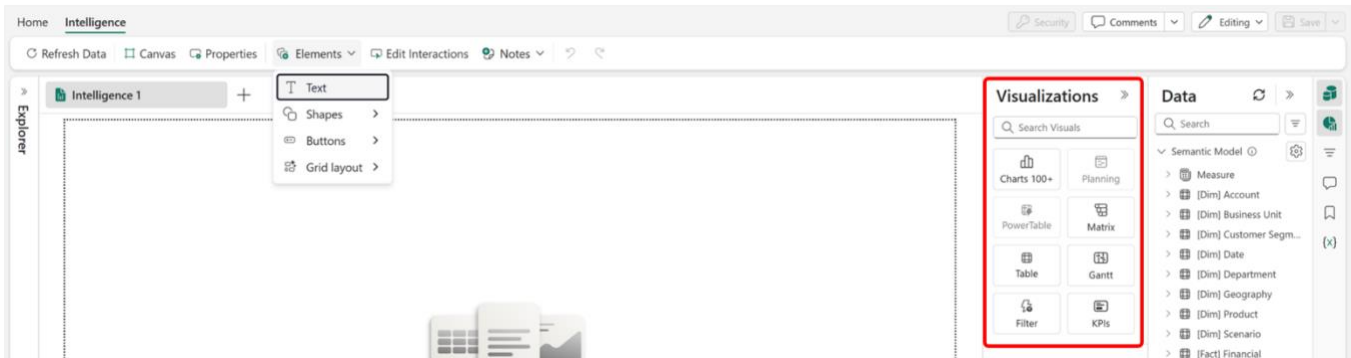
Part 2 Exploring the Interface

~5 min

Before building visuals, take a few minutes to orientate yourself with the two levels of toolbar control: sheet-level and visual-level

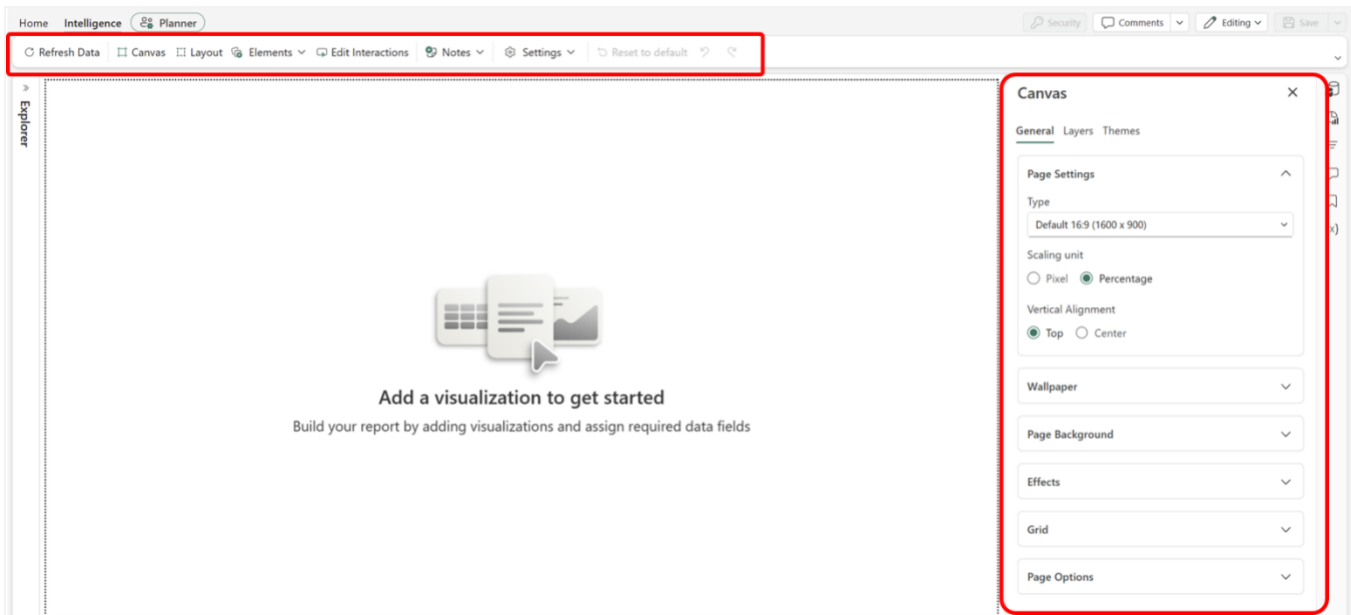
5. Visualization Tab

- i. Explore the visualization tab. It contains
 - a. Charts: Access 100+ charts organized by chart families
 - b. Matrix: To support multi row, column data.
 - c. Table: To render plain data without any hierarchy or columns
 - d. KPI: To render the key measures with 40+ sparkline and trellis support
 - e. Gantt: Gantt and resource gantt supported with milestones
 - f. Super Filter: Multiple types of filters are supported
 - g. Planning: Embed a plan sheet in Canvas
 - h. Power Tables: Fetch and embed a power table sheet in Canvas.



6. Toolbar and Canvas Controls

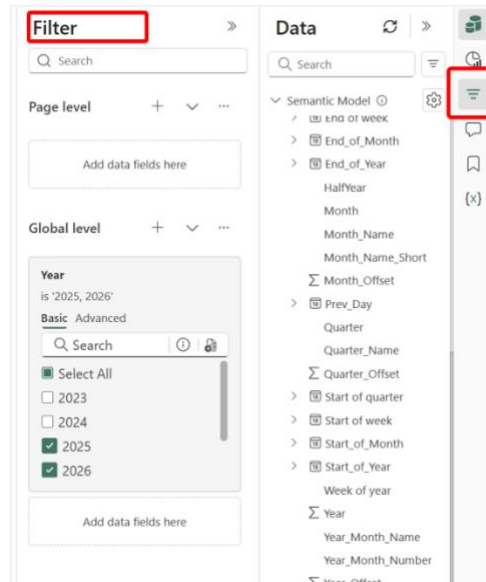
- i. Click the **Intelligence** tab on the ribbon. This tab controls actions that apply to the entire canvas, including:
 - a. General — adjust grid snapping, canvas size, and zoom level.
 - b. Layer — manage items and hide/show all objects.
 - c. Themes — apply a one-click colour theme across all visuals at once.
- ii. Canvas
- iii. Elements — insert shapes, text boxes, and image placeholders.
- iv. Edit interactions — define how filtering one visual affects others on the same canvas.



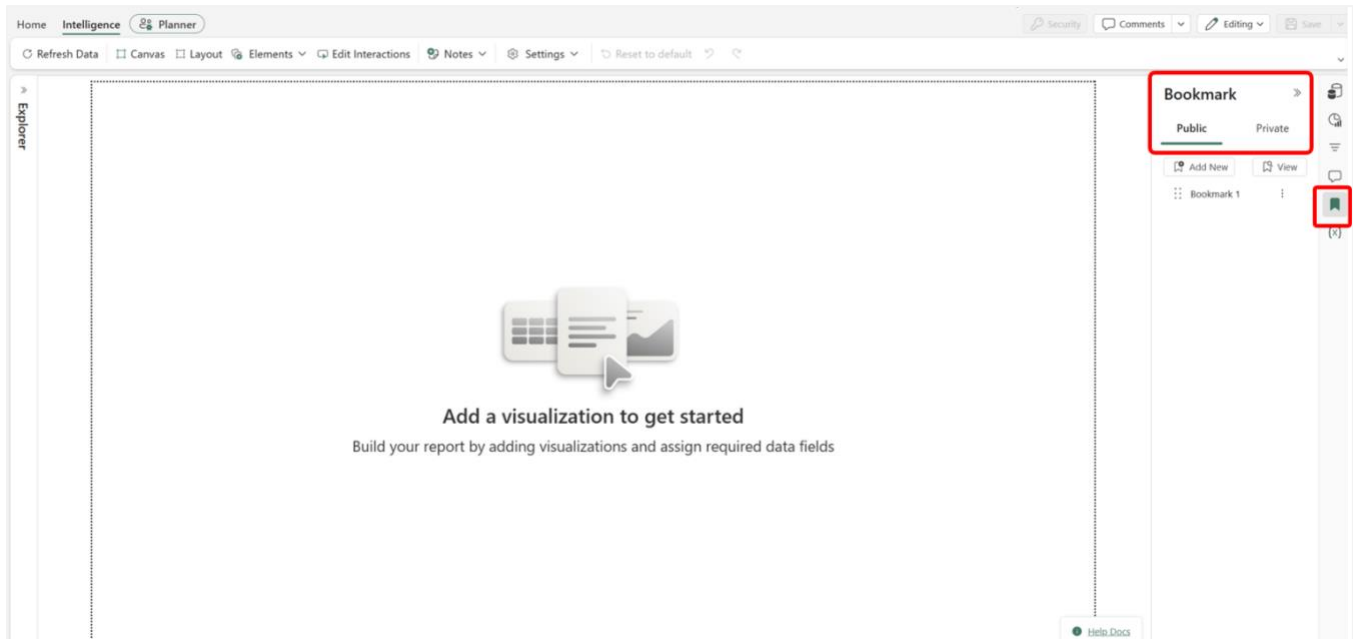
7. Locate the Filter pane and Bookmarks panel

- i. On the right side of the canvas toolbar, click the **Filter** icon.

- ii. The filter pane opens and supports both page-level filters (apply to all visuals on this sheet) and global filters (apply across all sheets in the workbook).
- iii. As a best practice, add **Year** under Global level filter to apply across the dashboard. Select **2025** and **2026**.

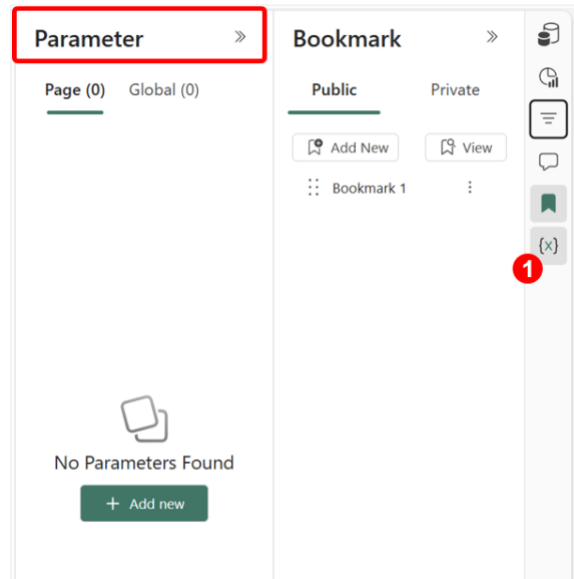


- iv. Below the filter icon, click the **Bookmarks** icon.
- v. In reading mode, any user can save a private bookmark that captures the current filter state and scroll position. These can be shared with colleagues, making it easier to hand off a specific analytical view.



8. Note the Parameters option

- i. Parameters allow you to store and reuse specific values across the dashboard — for example, a target margin percentage — or to trigger conditional display logic based on a user selection.



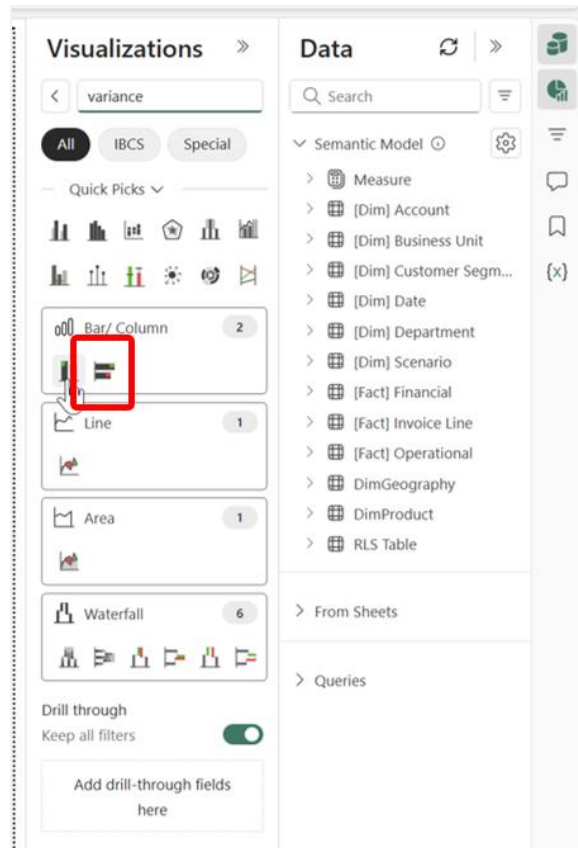
Part 3 Building the Dashboard

~10 min

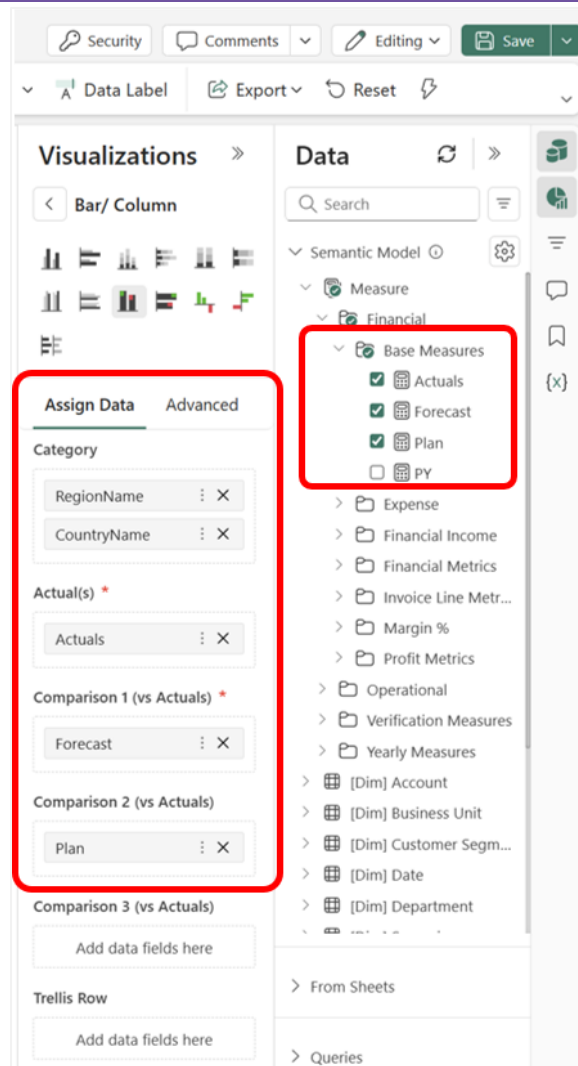
You will now build the dashboard step by step, adding a variance chart, trend chart, KPI card, matrix, and filter visual.

9. Insert a variance chart

- i. In the **Visualization** pane, click **Charts 100+**. Use the search bar to search for **variance** and select **Integrated Variance Bar Chart** from the results.



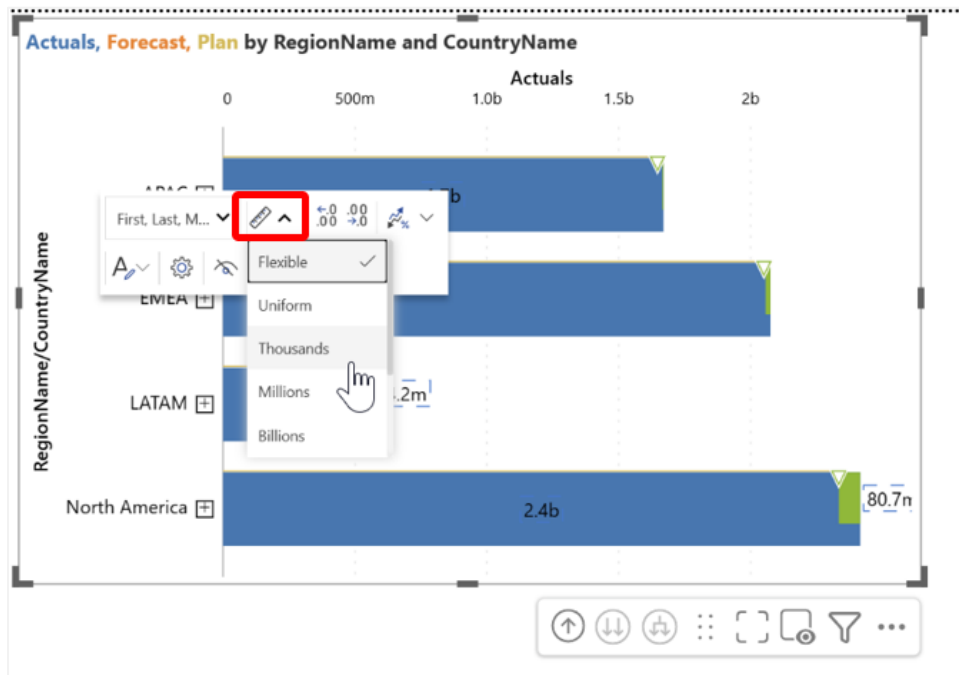
- ii. Click and it will automatically place on the canvas.
- iii. In the **Assign Data**, map the following fields:
 - a. Values (Actuals): Measures > Financial > Base Measures > Actuals
 - b. Values Comparison 2: Measures > Financial > Base Measures > Plan
 - c. Values Comparison 1: Measures > Financial > Base Measures > Forecast
 - d. Category: Dim Geography > RegionName
 - e. Category: Dim Geography > CountryName



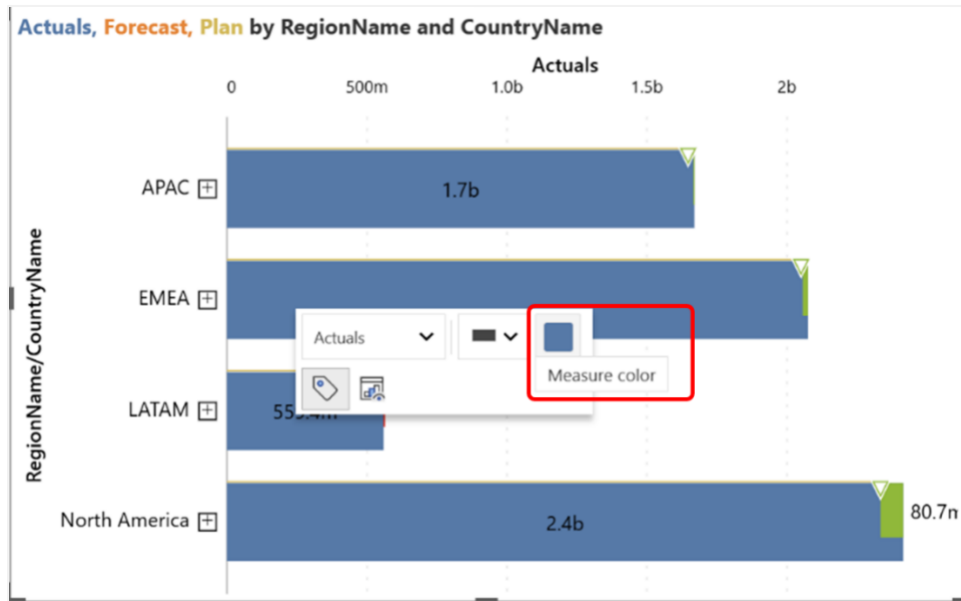
- iv. With the chart selected, click the **Drill down** arrow in the visual header to step from Region to country. Use **Expand all** to show all levels simultaneously.



- v. To improve readability, click on data label to open on-object options and adjust **Scaling** to **Thousands**

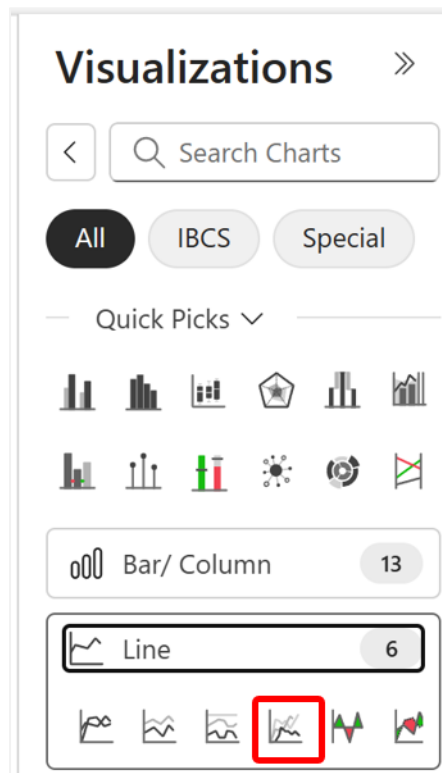


- vi. Click on a bar and under the options change **Series colours** to #3f7aab.



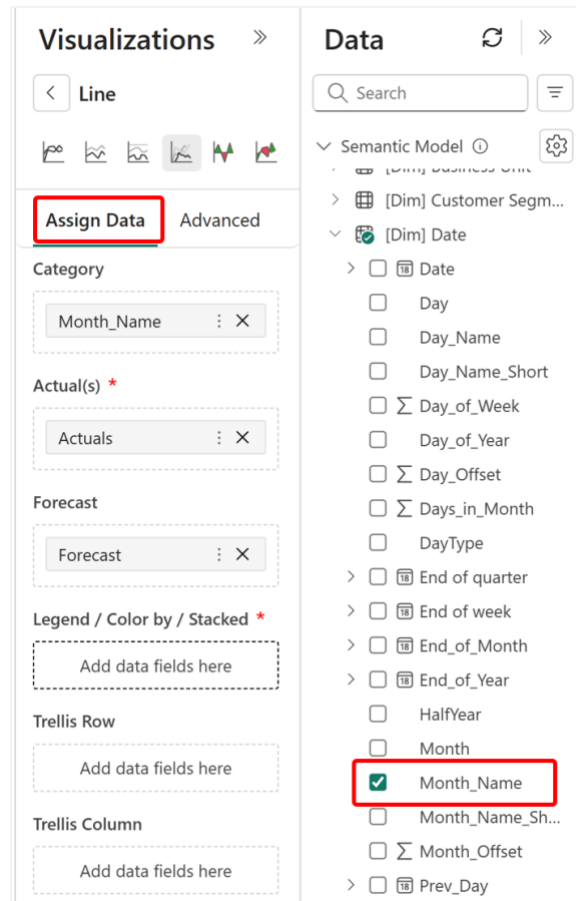
10. Insert a clustered/grouped line chart

- From the **Visualization** pane, select chart 100+ > expand line and select clustered/grouped line chart.

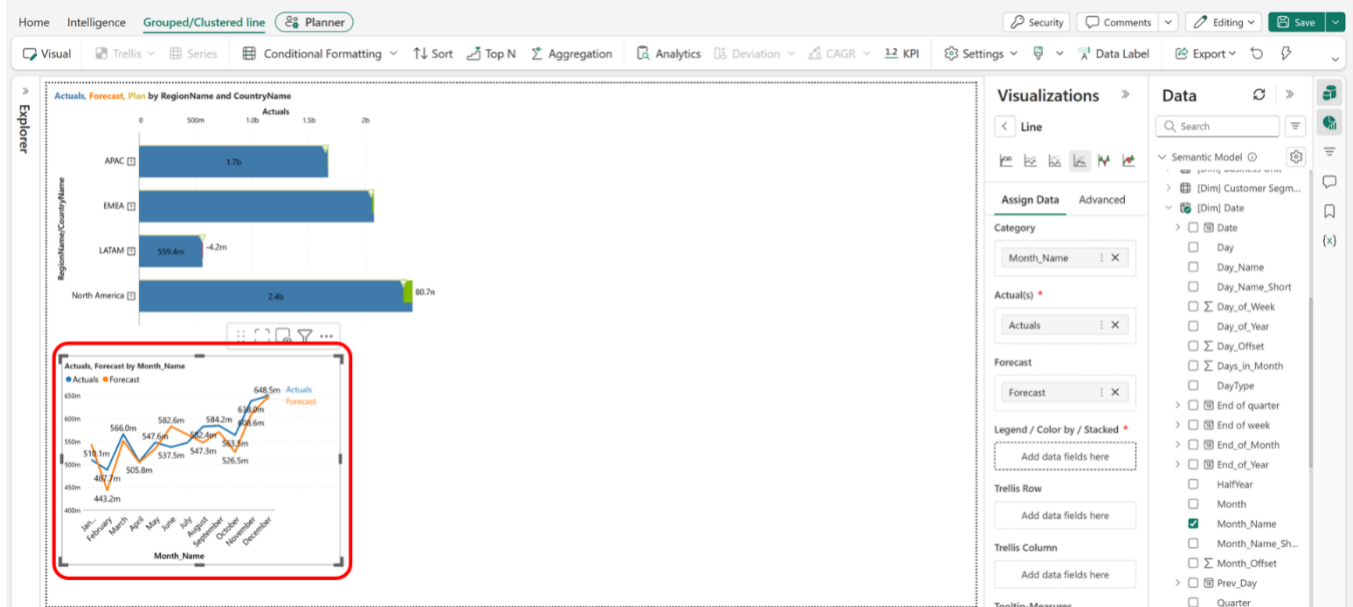


- In the **Field well**, map the following fields:

- a. Values (Actuals): Measures > Financial > Base Measures > Actuals
- iii. Forecast : Measures > Financial > Base Measures > Forecast
 - a. Category: Dim Date > Month Name

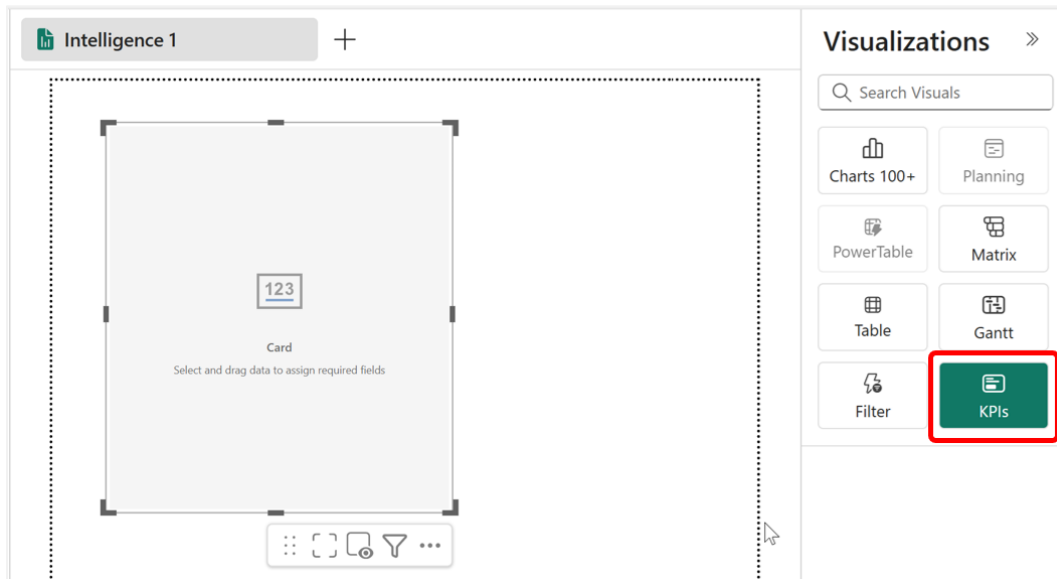


- iv. The trend chart shows how Actuals evolve over the selected time range and will respond to any date filter applied later in this exercise.

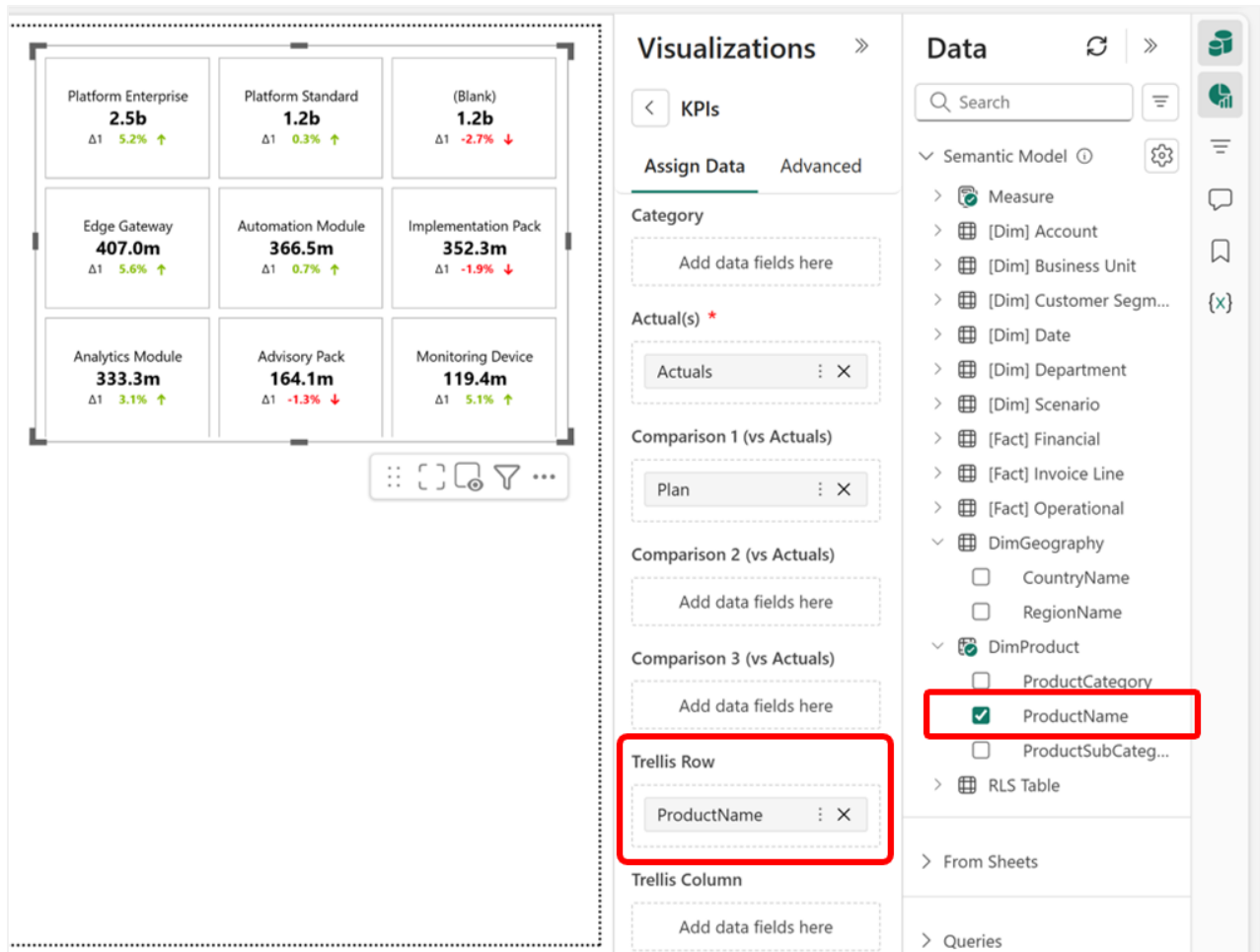


11. Insert a KPI Card

- i. From the **Visualization** pane, select **KPI Card**.



- ii. Map following data:
 - a. Values (Actuals): Measures > Financial > Base Measures > Actuals
 - b. Values Comparison 2: Measures > Financial > Base Measures > Plan
 - c. Trellis Row: DimProduct > ProductName



- iii. The card will tile into one panel per product, giving a quick at-a-glance comparison across the portfolio.

12. Insert a Matrix visual

- i. From the **Visualization** pane, select **Matrix**. In the field well, add dimensions and measures as follows:
 - a. Rows: Product Category, Product Subcategory
 - b. Columns: Date > Year, Month
 - c. Values: [Actuals], [Plan]

Visualizations

< Matrix

Rows

ProductCategory

:

×

ProductSubCate...

:

×

Columns

Date

▼

:

×

Year

:

×

Month

:

×

Values (AC)

Actuals

:

×

Compare to Prior Period (PY)

Plan

:

×

Data

Search

Semantic Model ⓘ

Measure

[Dim] Account

[Dim] Business Unit

[Dim] Customer Segm...

[Dim] Date

☑

Date

☑

Year

☐

Quarter

☑

Month

☐

Day

☐

Day

☐

Day_Name

☐

Day_Name_Short

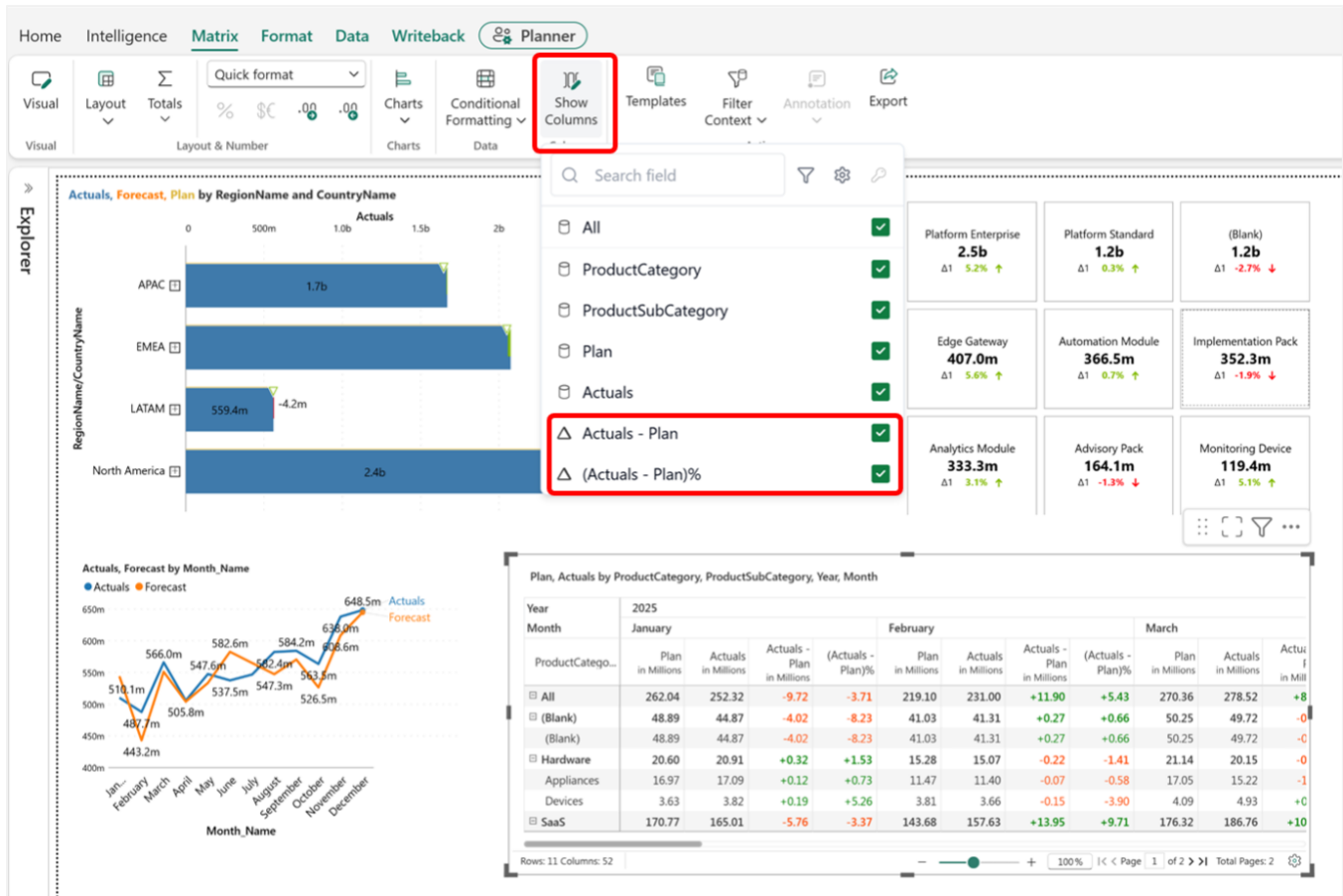
☐

Σ Day_of_Week

☐

Day_of_Year

- ii. Go to Matrix toolbar > Enable **Variance** and **Variance %**



iii. Columns appear automatically in the matrix without any additional configuration.

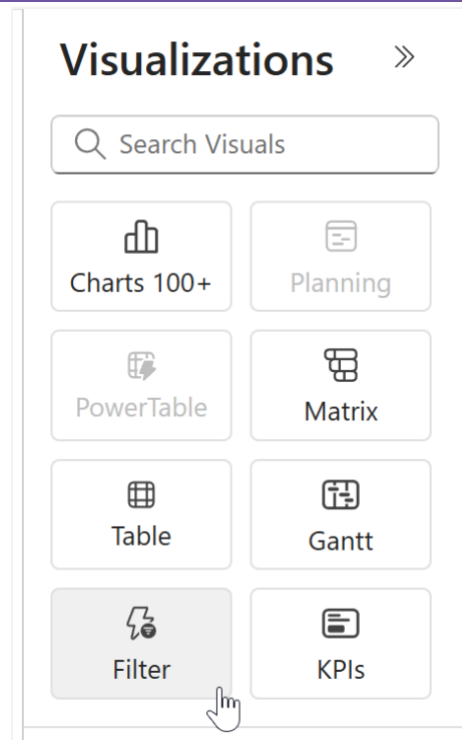
Part 4 Filters, Headers, and Commentary

~5 min

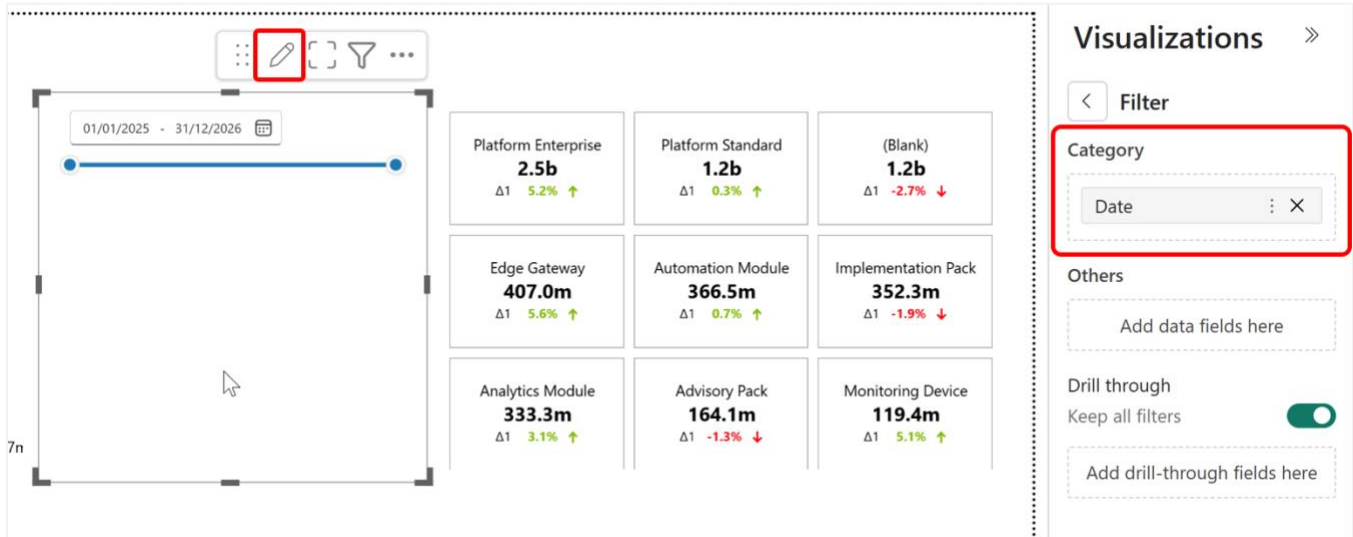
You will now build the dashboard step by step, adding a variance chart, trend chart, KPI card, matrix, and filter visual.

13. Insert a filter visual as date picker

- From the **Visualization** pane, select **Filter**. In the field well, map the **Date** dimension.



ii. Click pencil icon to open properties tab.



iii. In the **Properties** tab for the filter visual, change the filter type to **Date**

iv. Set the type as Calendar.

Properties

Filter by type

Date

General

Style

Data

Toolbar

Others

Global

Type

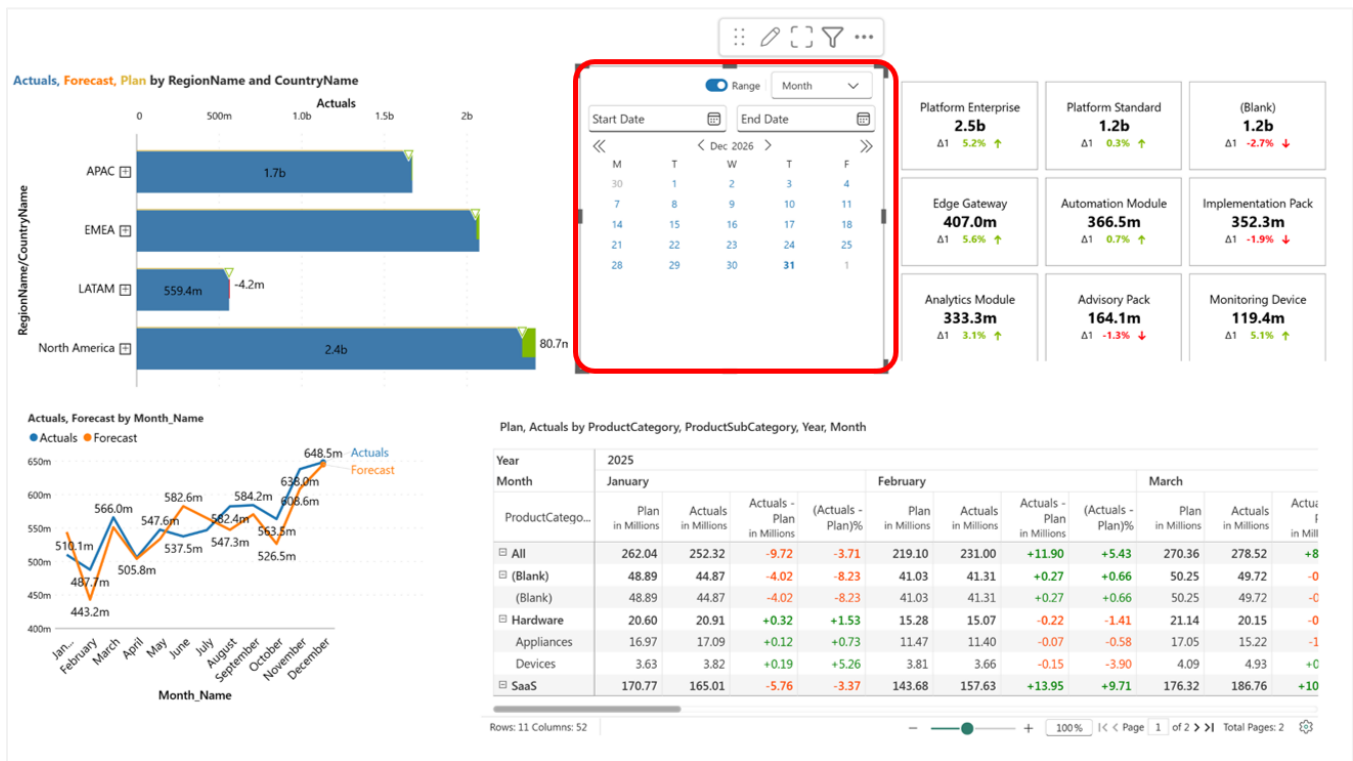
Calendar

Slider

Calendar

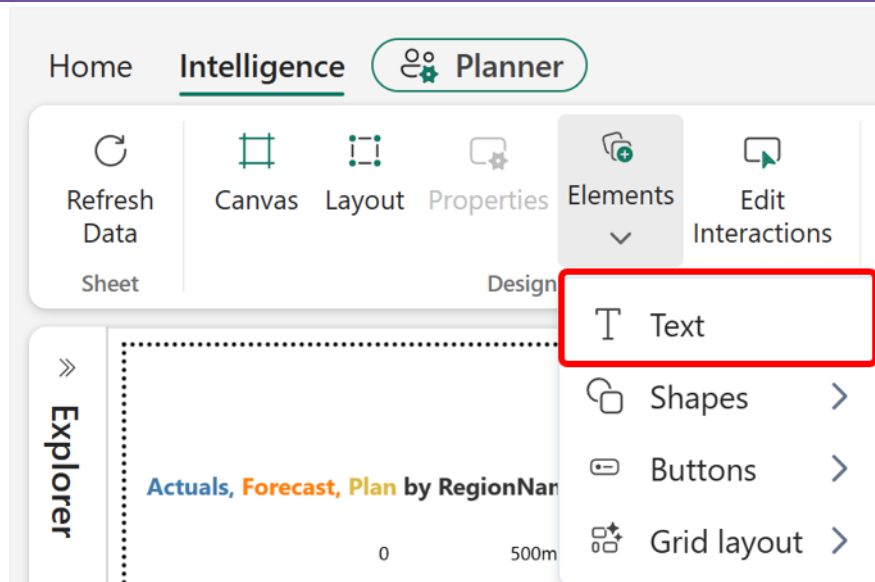
Relative Date

- v. Test the filter by selecting a range. The variance chart, trend chart, KPI card, and matrix should all update to reflect the selected period.

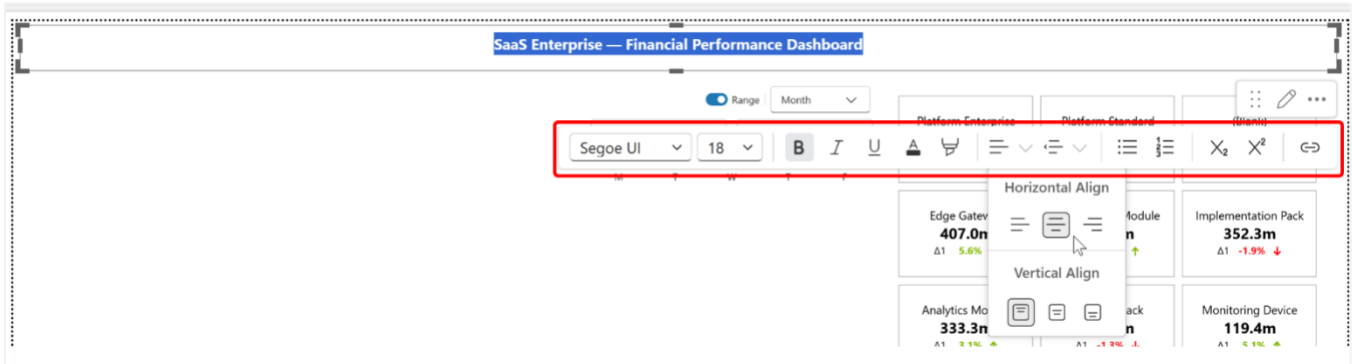


14. Add a Text header

- i. From the **Intelligence** tab, click **Elements > Text box**.



- ii. Type the dashboard title — for example, **SaaS Enterprise — Financial Performance Dashboard**.
- iii. Use the **Format** options to increase the font size and apply bold formatting.



- iv. Position the text box at the top of the canvas.

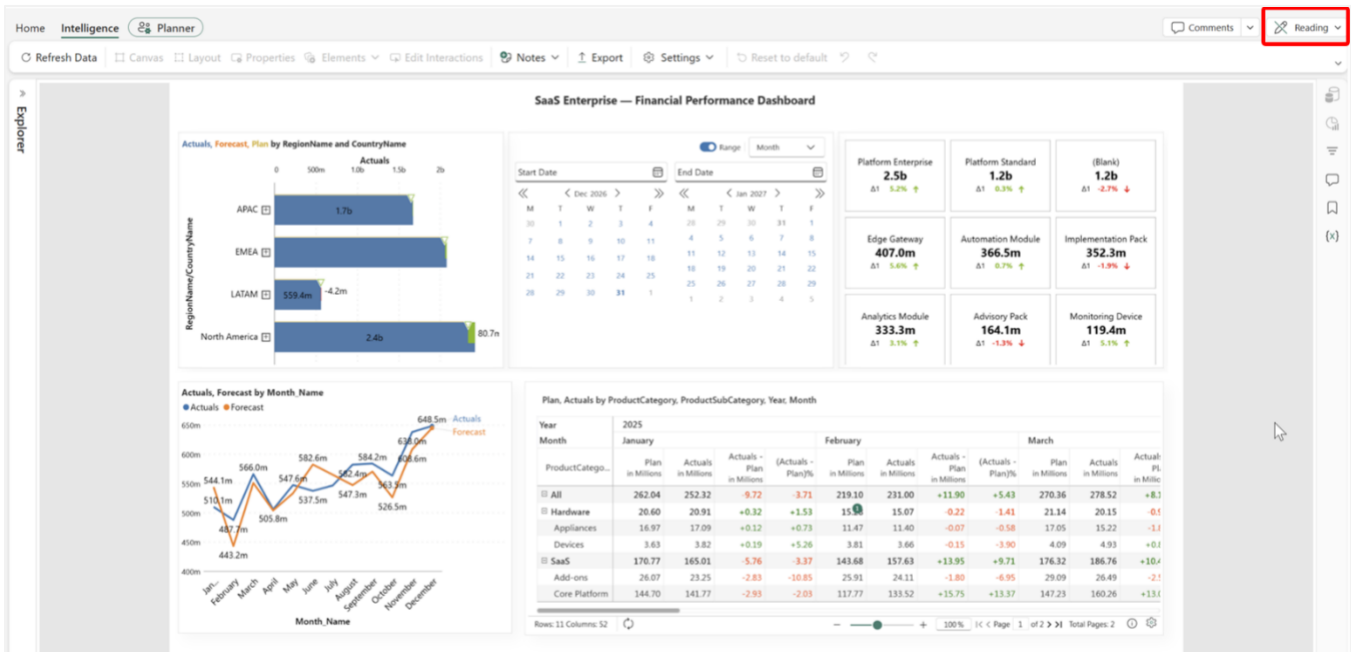
15. Add a comment and tag a colleague

- i. Click any cell or data point in the matrix visual.
- ii. In the top ribbon, select the **Comment** tab and click **Add comment**.

- Plan, Actuals by ProductCategory, ProductSubCategory, Year, Month

Year	2025									
Month	January				February	March				
ProductCatego...	Plan in Millions	Actuals in Millions	Actuals - Plan in Millions	(Actuals - Plan)%	Plan in Millions				Actuals in Millions	Actuals in Millions
All	262.04	252.32	-9.72	-3.71	219.10				278.52	+8
Hardware	20.60	20.91	+0.32	+1.53	15.28				20.15	-0
Appliances	16.97	17.09	+0.12	+0.73	11.47				15.22	-1
Devices	3.63	3.82	+0.19	+5.26	3.81				4.93	+0
SaaS	170.77	165.01	-5.76	-3.37	143.68				186.76	+10
Add-ons	26.07	23.25	-2.83	-10.85	25.91				26.49	-2
Core Platform	144.70	141.77	-2.93	-2.03	117.77				160.26	+13

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Outcome

- ✓ Connected an Intelligence Sheet to the SaaS Enterprise semantic model
- ✓ Navigated the sheet-level Intelligence tab and the visual-level ribbon tab
- ✓ Built a variance chart with drill-down, grouping, and scaling adjustments
- ✓ Added a trend chart, KPI card with small multiples, and an auto-variance matrix
- ✓ Applied a date picker filter and added a dashboard header
- ✓ Used Commentary to tag a colleague with filter-aware context