

Introduction to Intelligence Sheets

Fabric Planning · Hands-On · 25 min

The Big Picture

You are a BI analyst at a SaaS company. Your team has asked you to build an interactive Enterprise dashboard using live data from the Fabric Plan semantic model — connecting to the model, exploring the Intelligence Sheet interface, and 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 access to a full visualization library — charts, matrices, KPI cards, Gantt charts, and filters — without leaving the Fabric Plan environment.

Completing this exercise produces a fully connected Enterprise dashboard: a variance chart, a trend line chart, a KPI card, a variance matrix, a date filter, a dashboard header, and filter-aware commentary — all on one Intelligence Sheet.

Dashboard Components

Connect to the SaaS Enterprise semantic model, then build six components that turn a blank canvas into a working Enterprise dashboard.



Integrated Variance Bar Chart

Compares Actuals, Forecast and Plan by Region and Country, with drill-down to country level, thousands-scaled labels, and a custom series colour.



Grouped/Clustered Line Chart

Plots Actuals and Forecast by Month Name, revealing the trend the rest of the dashboard filters against.



KPI Card

Displays Actuals against Plan (Comparison 2) with Trellis Row set to ProductName, tiling one panel per product.



Matrix

Rows: Product Category and Subcategory. Columns: Year and Month. Values: Actuals and Plan, with Variance and Variance % enabled.



Date Filter

A Calendar-type filter visual on the Date dimension drives every other visual on the sheet.



Header & Commentary

A bold text header titles the dashboard; filter-aware comments let you tag colleagues at the cell, row, column or report level.

Key Terms

Intelligence Sheet

A canvas-based analysis layer sitting on top of a semantic model, Planning Sheet, or PowerTable; gives access to a 100+ visual library without leaving Fabric Plan.

Integrated Variance Bar Chart

A chart in the 100+ library that displays actual values as bars alongside a variance indicator against a comparison measure, typically used for AC vs PL/FC views.

Clustered/Grouped Line Chart

A Line-family chart ideal for showing a stacked category (e.g. Region) trending alongside a date axis.

KPI Card (Trellis Row)

Displays a primary measure against up to two comparisons; Trellis Row tiles the card into one panel per dimension member.

Matrix (Variance / Variance %)

A multi-row, multi-column visual that auto-calculates variance and variance % between two measures.

Global vs Page-Level Filters

Page-level filters apply to one sheet only; global filters apply across every sheet in the workbook.

Bookmarks & Parameters

Bookmarks save a filter state and scroll position for later recall; Parameters store reusable values, such as a target margin %, for conditional logic.

Your Deliverable at the End of E8 — Part 1

1

Connect to the Semantic Model

Open Fabric Plan, select Semantic Model, choose SaaS Enterprise from the list, and click Connect.

2

Create the Intelligence Sheet

From Home, select New Intelligence Sheet; rename the default "Intelligence sheet 1".

3

Explore the Visualization Tab

Review Charts 100+, Matrix, Table, KPI, Gantt, Super Filter, Planning, and Power Tables.

4

Explore Canvas & Toolbar

On the Intelligence tab, check Canvas (General, Layer, Themes), Elements, and Edit Interactions.

5

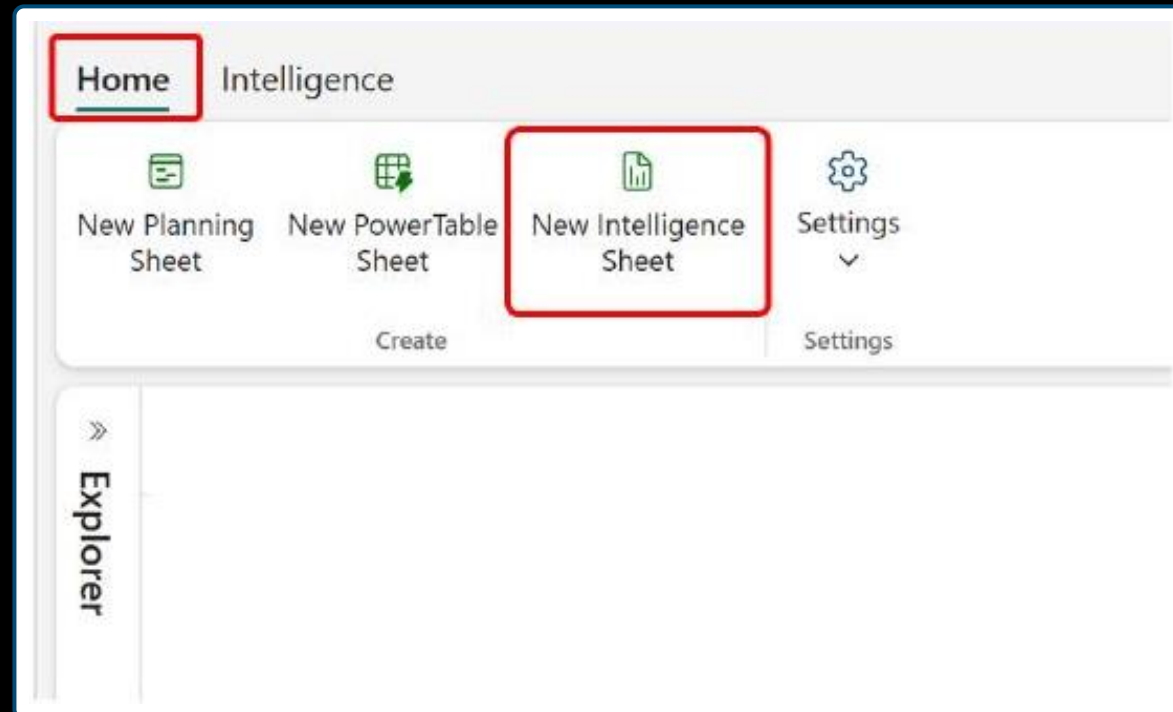
Set Up Filters & Bookmarks

Open the Filter pane, add Year as a Global filter (2025, 2026); locate Bookmarks and Parameters.

6

Insert the Variance Chart

Charts 100+ → search "variance" → Integrated Variance Bar Chart; place it on the canvas.



Your Deliverable at the End of E8 — Part 2

7

Assign & Format Variance Chart

Map Actuals, Forecast, Plan, Region, Country; drill Region→Country; scale labels to Thousands; set colour #3f7aab.

8

Add the Trend Line Chart

Charts 100+ → Line → Clustered/Grouped Line Chart; map Actuals, Forecast, Month Name.

9

Add the KPI Card

Map Actuals, Plan (Comparison 2), Trellis Row = ProductName.

10

Add the Matrix

Rows = Category/Subcategory, Columns = Year/Month, Values = Actuals/Plan; enable Variance and Variance %.

11

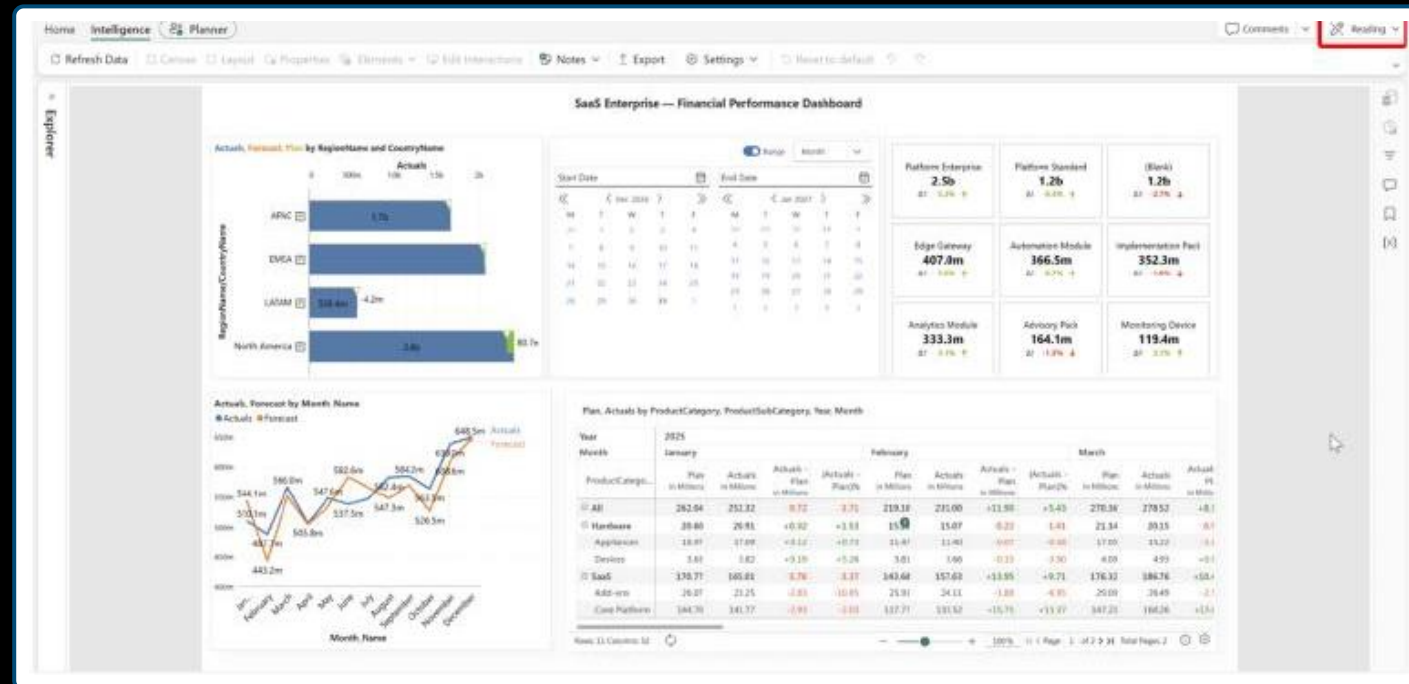
Add the Date Filter

Insert a Filter visual on Date, set type to Calendar, and test a range to confirm visuals update.

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Add Header, Comment & Save

Insert a text header, tag a colleague with @ in a comment, then Save the Intelligence Sheet.



References

[Get started with Intelligence sheets](#)

Describes how to create an Intelligence Sheet inside a Plan app and connect it to a semantic model.

[Charts in Intelligence sheets](#)

Explains how to insert charts from the 100+ library, including the Integrated Variance Bar Chart and Clustered/Grouped Line Chart.

[KPI cards in Intelligence sheets](#)

Covers inserting a KPI card, configuring comparisons, and using Trellis Row for small multiples.

[Matrix visuals in Intelligence sheets](#)

Details rows/columns setup and enabling automatic Variance and Variance % columns.

[Filters, Bookmarks & Commentary](#)

Covers page-level vs global filters, saving Bookmarks, Parameters, and adding filter-aware Commentary.