Fabric Plan

E9 Introduction to Intelligence Sheets — FAQs

This FAQ addresses common questions that arise while building a Profit and Loss statement in the Intelligence Sheet. It covers semantic model connection, Matrix configuration, calculated and input rows, formatting, custom columns, report headers, and export options.

Part 1 Create the Intelligence Sheet and Map Data

1. How do I connect a semantic model to the Intelligence Sheet?

From the Data panel, click Add Semantic Model, select the required semantic model, and click Connect.

2. Can I use an existing semantic model in the Intelligence Sheet?

Yes. Intelligence Sheets connect directly to an existing semantic model to retrieve measures and dimensions for reporting.

3. How do I create a new Intelligence Sheet?

Go to the Home tab and select New Intelligence Sheet.

4. How do I add a Matrix visual?

From the Visualization pane, select the Matrix visual and add it to the canvas.

5. Which measures should I add to build the P&L report?

Add Actuals and Plan to the Actuals and Plan Values section.

6. Which dimensions should I use for the P&L report?

Add Account Hierarchy to Rows and Time to Columns.

7. How do I apply the Financial template?

From the Matrix tab, select Templates and choose Financial.

8. What formatting does the Financial template apply?

It automatically applies indentation, subtotals, and bold formatting for parent rows.

Part 2 Add Calculated and Input Rows

9. Can I insert rows that do not exist in the semantic model?

Yes. You can insert calculated rows and Data Input rows without modifying the semantic model.

10. How do I create a calculated row?

Select Data > Insert Row > Calculated Row, enter the row name and formula, then click Create.

11. Can calculated rows reference other rows?

Yes. Calculated rows support row references.

12. How do I create a Gross Margin % row?

Insert a Calculated Row, enter the formula using row references, and apply Percentage formatting.

13. Can I format calculated rows as percentages?

Yes. Select the row and click the % option from the Matrix toolbar.

14. How do I insert a Data Input row?

Select the row gripper and choose Insert > Data Input.

15. What are Data Input rows used for?

They allow users to manually enter values not available in the semantic model.

16. Can calculated rows use manually entered values?

Yes. Calculated rows can reference Data Input rows.

17. How do I create an Earnings Per Share (EPS) row?

Insert a Calculated Row, enter the formula Revenue / Shares Outstanding, and click Create.

18. How do I format a calculated row as currency?

Select the row, click the $€ option from the Matrix toolbar, and specify the required currency prefix.

Part 3 Format and Organize the Report

19. How do I group multiple rows?

Select the required rows and choose Matrix > Layout > Create Group.

20. Can I hide confidential rows?

Yes. Use Actions > Hide icon & children on the row group.

21. How do I apply font colour to a row?

Choose Format > Font Color and select the required colour.

22. How do I group multiple columns?

Select the required columns and choose Matrix > Layout > Create Group.

23. Can I reorder rows?

Yes. Drag and drop rows into the required position.

24. Can I reorder columns?

Yes. Drag and drop columns into the required position.

25. How do I highlight important rows?

Apply a Fill Color from the Format tab.

26. How do I enable gridlines?

Go to Format > Grid and enable Major Gridlines.

27. Can I apply company branding to the Matrix header?

Yes. Customize the Matrix header using your organization's colours.

Part 4 Add Custom Columns, Report Header, and Export

28. How do I create an Approval Status column?

Select Data > Insert Column > List > Single Select, choose the Approval Status preset, and click Create.

29. How do I add a Stakeholder column?

Select Data > Insert Column > Person.

30. How do I assign ownership to a stakeholder?

Type @ followed by the person's name.

31. How do I insert a report header?

Go to Format > Header & Footer and select Presets > Header.

32. Can I replace the default logo?

Yes. Use Replace Image to upload your company logo.

33. How do I export the report to Excel?

Select Matrix > Export > Excel.

34. Does Excel export preserve hierarchy?

Yes. Expand and collapse functionality is **preserved**.

35. How do I export the report to PDF?

Select Matrix > Export > PDF.

36. Does export preserve report formatting?

Yes. Report layout and formatting are preserved.

37. What is the outcome of this exercise?

You will create a formatted P&L statement with calculated rows, Data Input rows, custom columns, branding, and Excel/PDF export support.

38. Can I share the exported report with stakeholders who do not have access to the Intelligence Sheet?

Yes. Exporting the report to Excel or PDF allows it to be shared with stakeholders outside the Intelligence Sheet environment.

39. Can I continue editing the Intelligence Sheet after exporting?

Yes. Exporting creates a copy of the report and does not affect the Intelligence Sheet.

40. What capabilities are covered by the end of this exercise?

By the end of the exercise, you will have connected a semantic model, created a financial Matrix, added calculated and Data Input rows, grouped and formatted data, created custom columns, applied a branded report header, and exported the report to Excel and PDF.