Fabric Plan

Prerequisites and setup checklist

Work through this before starting the exercises. The fastest path is a 60-day Fabric trial capacity plus Contributor access to a workspace; most other requirements follow from those two. Some items may need your Fabric admin.

Capacity and licensing

Use a 60-day Fabric trial capacity unless your organization has told you otherwise. It costs nothing and keeps practice work off a production capacity. To start one, sign in at app.fabric.microsoft.com and select **Start trial** from the account menu.

If you are using an existing capacity instead, any Fabric capacity (F SKU), Power BI Premium (P1 or higher), Power BI Pro, or PPU will work.

Workspace access

- ✓ **Viewer access is not enough.** A Viewer can read plans and, inside a Plan item, enter data, comment, and approve, but cannot create or author anything. Request Contributor access before you start.
- ✓ **Do not use My Workspace.** Semantic models published there are not supported by Plan.

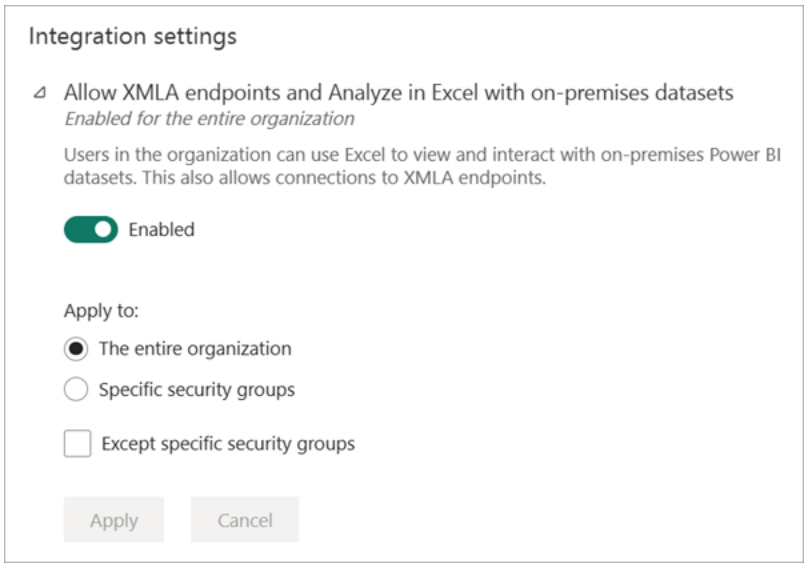
Browser and network

- ✓ **Use Microsoft Edge or Google Chrome, kept up to date.** Fabric has known display issues on Safari; do not use it for this training.
- ✓ **Use a laptop, not a tablet.** Drag and drop in the semantic model editor does not work reliably on touch screens.
- ✓ **Confirm you can reach app.fabric.microsoft.com from your network,** without a firewall or proxy blocking it.

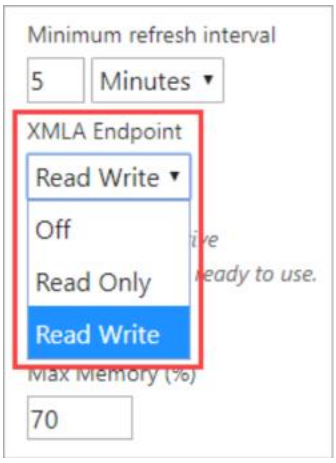
Admin settings

In most tenants, there is nothing to do here. Connecting a plan to a semantic model now uses your own sign-in and existing Power BI workspace permissions; no DMTS connection, shared cloud connection, or service principal, and the relevant tenant settings are on by default. Skip this section unless you are blocked. If you are, ask your Fabric admin to check:

- **Integration settings —** “Allow XMLA endpoints and Analyze in Excel with on-premises semantic models” is enabled.



- **Capacity settings –** The ‘XMLA Endpoint’ is set to Read Only/ Read Write.



- **Session upgrade controls —** if you can’t start a Planner session, ask your admin whether these controls are restricting access for your account.

Confirm your setup

Run this check before the session so you are not debugging access during exercise one.

- ✓ **Open your workspace and select New item.** If the button is missing, collapse the task flow pane at the top of the page and look again.
- ✓ **Confirm Plan appears in the item type list.** If it does not, your workspace is not on a supported capacity, or a tenant setting is blocking it.
- ✓ **Create a report and delete it.** This confirms your role allows you to create and remove items.

Troubleshooting

Symptom	Likely cause	Fix
Plan missing from the item type list	Workspace is not on a supported capacity, or a tenant setting blocks Plan	Confirm the workspace is on a trial, F SKU, or P capacity. If it is, ask your admin to check the Plan tenant settings.
Semantic model will not connect	Model is published in My Workspace	Move the model to a workspace on a supported capacity.
Connection fails despite correct roles	XMLA endpoints disabled at tenant level	Admin: enable “Allow XMLA endpoints and Analyze in Excel with on-premises semantic models” under Integration settings.
Cannot start a Planner session	Tenant-level session upgrade controls restrict who can reach Planner	Admin: add you to the permitted group in the Plan tenant settings.
Partial or unexpected data	RLS roles do not cover the full dataset, or you are unassigned	Assign users to roles and confirm the roles cover all rows.
Drag and drop not working in the model editor	Using a tablet or touch screen	Switch to a laptop or desktop with a mouse.