

Prerequisites and setup checklist

Before starting the Fabric Planning self-service training, please ensure your environment meets the following requirements. This checklist covers licensing, permissions, admin configuration, browser and network setup, and known limitations. Work through it before beginning the exercises — some items may require your Fabric admin to act on your behalf.

Browser

- ✓ **Microsoft Edge or Google Chrome is installed and up to date.** Fabric has known display issues on Safari — do not use Safari for this training.
- ✓ **Fabric opens correctly in your browser.** Go to app.fabric.microsoft.com and confirm that you can sign in and see your workspace.

Access & Network

- ✓ **You can access app.fabric.microsoft.com from your network,** without it being blocked by a firewall or proxy.
- ✓ **Use a laptop, not a tablet.** Drag and drop in the semantic model editor does not work reliably on touch screens.

Capacity & Licensing

- ✓ **Your organization has Microsoft Fabric enabled.** Sign in to app.fabric.microsoft.com — if you can access it, Fabric is enabled for your account.
- ✓ **A Fabric capacity (F-SKU) or Power BI Premium (P1, P2, and higher / P1–P5) is assigned to your workspace, and you have Member or Admin access to it.** In your workspace → Settings, confirm a Fabric capacity is assigned and that your role is Member or Admin. If you can't access Settings, or if your role is Contributor or Viewer, contact your workspace admin to confirm the capacity assignment and upgrade your access before starting the exercises.

Capacity/license	Status	Notes
Microsoft Fabric capacities (F SKUs)	Supported	Primary supported path for XMLA + embed-token scenarios.
Power BI Premium (P1, P2 and higher / P1–P5)	Supported	Supported for XMLA + embed-token scenarios.
Power BI Pro	Not supported	Cannot be used for Plan XMLA/embed-token scenarios.
Power BI Premium Per User (PPU)	Not supported	Cannot be used for Plan XMLA/embed-token scenarios.
Lower / smaller SKUs	Conditional	May have XMLA and memory limitations that prevent supported usage.

Admin Configurations

Confirm with your Fabric admin that the following are enabled in the admin portal before the training begins.

Tenant Settings:

- Under Integrated settings – “Allow XMLA Endpoints & Analyze in Excel with on-premises semantic model” Option is enabled.

Integration settings

Allow XMLA endpoints and Analyze in Excel with on-premises datasets

Enabled for the entire organization

Users in the organization can use Excel to view and interact with on-premises Power BI datasets. This also allows connections to XMLA endpoints.

Enabled

Apply to:

☒ The entire organization

☐ Specific security groups

☐ Except specific security groups

Apply

Cancel

- Under Developer settings - “Embed content in apps” option is enabled.

Developer settings

Embed content in apps

Enabled for the entire organization

Users in the organization can embed Power BI dashboards and reports in Web applications using "Embed for your customers" method. [Learn More](#)

☒ Enabled

Apply to:

☒ The entire organization

☐ Specific security groups

☐ Except specific security groups

Apply

Cancel

- Under Developer settings – “Service Principals can call Fabric public APIs” is enabled (For service principal-based authentication)

Admin portal

Tenant settings New

Users

Premium Per User

Audit logs

Domains

Workloads

Tags

Capacity settings

Refresh summary

Embed Codes

Organizational visuals

Organizational themes (preview)

Azure connections

Workspaces

Custom branding

Fabric identities

Featured content

Microsoft Purview setting

Help + support

Service health (preview)

Known issues (preview)

There are new or updated tenant settings. Expand to review the changes.

Developer settings

Service principals can create workspaces, connections, and deployment pipelines

Disabled for the entire organization

Service principals can call Fabric public APIs

Enabled for the entire organization

This setting allows service principals with the appropriate [roles and item permissions](#) to call Fabric public APIs. To **allow** service principals to create workspaces, connections, and deployment pipelines turn on the setting titled "Service principals can create workspaces, connections, and deployment pipelines". [Learn More](#)

☒ Enabled

Apply to:

☒ The entire organization

☐ Specific security groups

☐ Except specific security groups

Apply

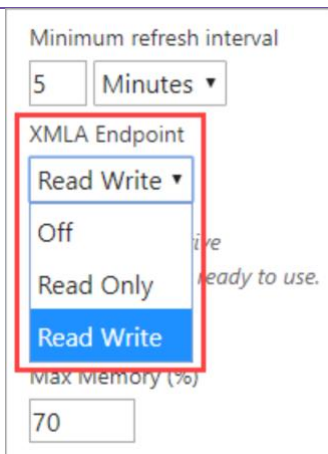
Cancel

Allow service principals to create and use profiles

Disabled for the entire organization

Capacity settings:

- The 'XMLA Endpoint' setting is set to Read Only or Read Write.



Minimum refresh interval
5 Minutes ▾

XMLA Endpoint
Read Write ▾
Off
Read Only
Read Write

Max memory (%)
70

Confirm Your Setup

Test that everything is working before you begin. In your Fabric workspace, try creating a new report and deleting it. If you can do this successfully, your workspace role and capacity are correctly configured, and you are ready to start the exercises.

Known Limitations

Be aware of the following limitations before you begin. If any of these apply to your environment, contact your Fabric admin before starting the exercises.

- ✓ **B2B user support** — Microsoft Entra B2B guest accounts are not supported in Plan.
- ✓ **Private link support** — Plan items are not supported in workspaces or tenants that use private links.
- ✓ **Semantic model** — Semantic models published in My Workspace are not supported.
- ✓ **Capacities supported** — Power BI Pro and Power BI Premium Per User (PPU) are not supported for Plan scenarios that use XMLA endpoints and embed tokens. Lower-capacity SKUs that do not support XMLA endpoints are also not supported.
- ✓ **Workspace permissions** — Users with the Contributor role
 - cannot create or share cloud connections.
 - cannot create Plan artifacts that require embed token generation.

Common Pitfalls & Troubleshooting

Symptom/error	Root cause	Resolution
"The connection owner must be a workspace Member or Admin..."	Most common. The shared connection owner has only a Contributor (or lower) role, so no embed token can be issued.	Workspace Admin: Manage access › upgrade the connection owner to Member or Admin.
Connection fails despite correct roles	Common. Embed content in apps is disabled at the tenant level (or XMLA endpoints not allowed).	Fabric admin: enable Embed content in apps and Allow XMLA endpoints... in tenant settings.
"Semantic model not found"	Model was moved, renamed, or deleted; or the owner lacks access to the correct workspace.	Verify the model exists in the target workspace; reconnect to the new location; ensure owner is Member/Admin there.
"Shared cloud connection expired"	The connection's stored credentials expired.	Settings › Manage connections and gateways › locate connection › Edit credentials › reauthenticate › Save.
Workspace not accessible	Connection owner is not a Member of the workspace.	Add the connection owner as a Member or Admin in Manage access, then retry.
Unsupported capacity	Model hosted on Pro/PPU, or a SKU without XMLA, or XMLA endpoint set to None.	Move the model to an F SKU or P1–P5 capacity; set XMLA Endpoint to Read Only.
Users see partial/unexpected data	RLS roles don't cover the full dataset, or the user is unassigned (union behavior).	Assign users to roles; ensure roles cover all rows.