**0) Prep (one time)**

1. Put the Excel file (**Strategy\_Mockup\_With\_Targets.xlsx**) in **OneDrive for Business** or **SharePoint**.
2. In Excel, make sure every sheet is a **formatted Table** (Home → Format as Table). Use these names:

* Pillar, Objective, Priority, KPI, TimePeriod, KPI\_Targets, KPI\_Actuals.

If you used the file I gave you, they’re already table-like. If Power Apps can’t find them, quickly select each range and “Format as Table.”

**1) Create the Canvas app**

* Power Apps → **Create** → Canvas app → **Tablet** layout (more space).
* **Data** pane → **Add data** → OneDrive/SharePoint → select your Excel → check the seven tables above.

**2) Load data into local collections (faster UI)**

App **OnStart**:

ClearCollect(colPillar, Pillar);

ClearCollect(colObjective, Objective);

ClearCollect(colPriority, Priority);

ClearCollect(colKPI, KPI);

ClearCollect(colPeriod, TimePeriod);

ClearCollect(colTarget, KPI\_Targets);

ClearCollect(colActual, KPI\_Actuals);

Then run **App → Run OnStart**.

**3) UI layout (4 galleries + period filter)**

**A) Top filter (quarter)**

Insert **Dropdown** → Name: drpPeriod → **Items**:

SortByColumns(colPeriod, "FiscalYear", Descending)

**DisplayFields**: set to show "FiscalYear" & "FiscalQuarter" (or create a label:

Text(ThisItem.FiscalYear) & " " & ThisItem.FiscalQuarter

)

**B) Left gallery = Pillars**

Insert **Vertical Gallery** → Name: galPillars → **Items**:

SortByColumns(colPillar, "PillarOrder", Ascending)

Template shows: ThisItem.PillarName.

**C) Middle-left gallery = Objectives (filtered by pillar)**

Insert **Vertical Gallery** → Name: galObjectives → **Items**:

SortByColumns(

Filter(colObjective, PillarID = galPillars.Selected.PillarID),

"ObjectiveOrder",

Ascending

)

Show: ThisItem.ObjectiveCode & ". " & ThisItem.ObjectiveTitle.

**D) Middle-right gallery = Priorities (filtered by objective)**

Insert **Vertical Gallery** → Name: galPriorities → **Items**:

SortByColumns(

Filter(colPriority, ObjectiveID = galObjectives.Selected.ObjectiveID),

"PriorityOrder",

Ascending

)

Show: ThisItem.PriorityTitle.

**E) Right gallery = KPIs (filtered by priority)**

Insert **Vertical Gallery** → Name: galKPIs → **Items**:

Filter(colKPI, PriorityID = galPriorities.Selected.PriorityID)

Inside the KPI template, add:

* **Label** (KPI name): ThisItem.KpiName
* **Label** (Target/Actual):
* With(
* {
* tgt: LookUp(colTarget, KpiID = ThisItem.KpiID && PeriodID = drpPeriod.Selected.PeriodID),
* act: LookUp(colActual, KpiID = ThisItem.KpiID && PeriodID = drpPeriod.Selected.PeriodID)
* },
* "Target: " & Text(Coalesce(tgt.TargetValue, Blank())) &
* " Actual: " & Text(Coalesce(act.ActualValue, Blank()))
* )
* **Status icon** (✅ if actual ≥ target, else ⚠️). Use a **Label**:
* With(
* {
* tgtVal: Value(Coalesce(LookUp(colTarget, KpiID = ThisItem.KpiID && PeriodID = drpPeriod.Selected.PeriodID).TargetValue, Blank())),
* actVal: Value(Coalesce(LookUp(colActual, KpiID = ThisItem.KpiID && PeriodID = drpPeriod.Selected.PeriodID).ActualValue, Blank()))
* },
* If(!IsBlank(tgtVal) && !IsBlank(actVal) && actVal >= tgtVal, "✅", "⚠️")
* )

**4) Edit & save Actuals (write back to Excel)**

In the KPI template, add a **TextInput** txtActual and a **Save** button:

**Button.OnSelect** (UPSERT: update if exists else insert)

With(

{

existing: LookUp(

KPI\_Actuals, /\* <-- use the connected Excel table, not the collection \*/

KpiID = ThisItem.KpiID && PeriodID = drpPeriod.Selected.PeriodID

)

},

If(

IsBlank(existing),

Patch(

KPI\_Actuals,

Defaults(KPI\_Actuals),

{

KpiID: ThisItem.KpiID,

PeriodID: drpPeriod.Selected.PeriodID,

ActualValue: Value(txtActual.Text),

CapturedOn: Now(),

SourceSystem: "Power Apps"

}

),

Patch(

KPI\_Actuals,

existing,

{

ActualValue: Value(txtActual.Text),

CapturedOn: Now(),

SourceSystem: "Power Apps"

}

)

)

);

// refresh in-memory cache so the galleries show new values immediately

ClearCollect(colActual, KPI\_Actuals);

Tip: For **Target** editing, do the same using table KPI\_Targets.

**5) Sorting & cosmetics (so it looks like the slide)**

* For each gallery, set **Wrap** on labels, and **TemplateSize** tall enough for readability.
* Use **PillarOrder / ObjectiveOrder / PriorityOrder** to keep the exact sequence your manager expects.
* Add subtle separators between objectives/priorities (Rectangle with height 1).

**6) Notes on Excel connector (important)**

* **Delegation**: Excel is non-delegable; keep row counts modest for the demo. For production, move to **Dataverse** or **SQL**.
* **Concurrency**: if multiple users edit at once, Excel can be flaky. Fine for a mock-up.
* **Tables only**: ensure every range is a Table (Power Apps can’t write to plain ranges).

**7) What to say to your manager (one liner)**

“This Power Apps mock-up reads our strategy model (Pillars→Objectives→Priorities→KPIs) from Excel and lets us set/view quarterly Targets and Actuals. Once approved, I’ll switch the data source to Dataverse/SQL for security, scale, and governance.”

If you want, tell me which **brand colors** your team uses and I’ll give you the exact **theme & color formulas** (Fill/Color/Border) so the app matches your slide style.