

# Maximize efficiency with Power Query templates

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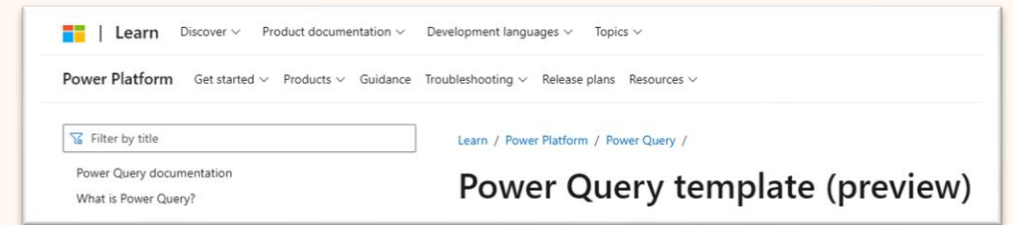


# Agenda

- What are Power Query (PQ) templates in MSM
- Why and how to use them in MSM
- PQ templates and 3P connectors
- Q&A

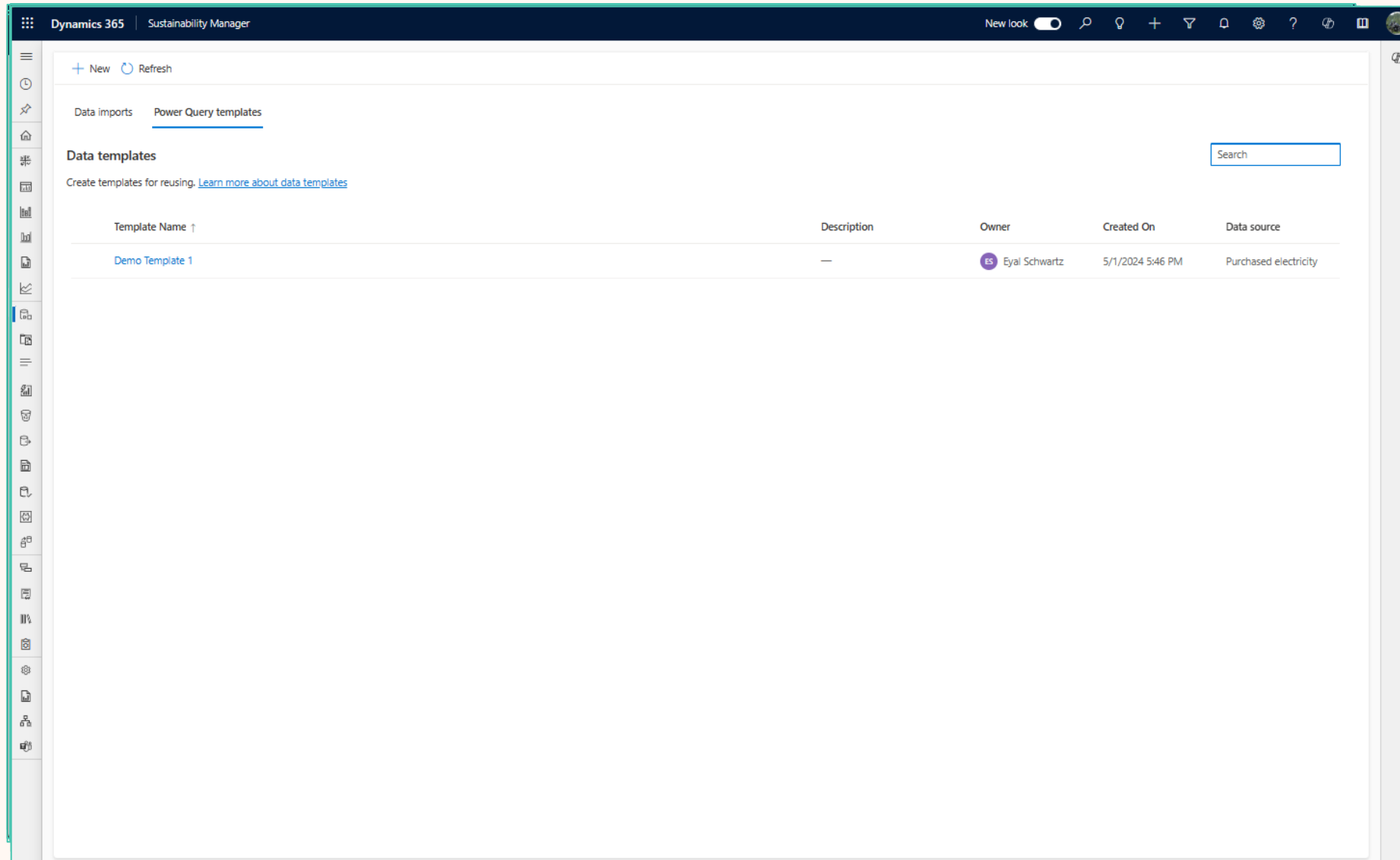
# Power Query Templates in MSM

- Power Query in MSM Ingestion: Extract, Transform, and Load
- Power Query (PQ) transformations: Powerful, advanced ingestion action
- Objective:
  - Designer: PQ expert **designs & implements** a template
  - User: Sustainability practitioners **use** the template
- Designer:
  - Define data transformations
  - Use PQ Parameters for *slot-filling*
  - Define attribute mapping
- User:
  - Instantiate template
  - *Fills in slots* to customize ingestion to their specific case
- PQ templates are not specific to MSM
  - *“package your entire Power Query project in a single file”*
- MSM PQ templates add specific functionality
  - PQ Templates + MSM Mapping + Connection wrapper




# Walkthrough Demo

- Expert PQ Designer → creates PQ Template in MSM ... Practitioner → uses template

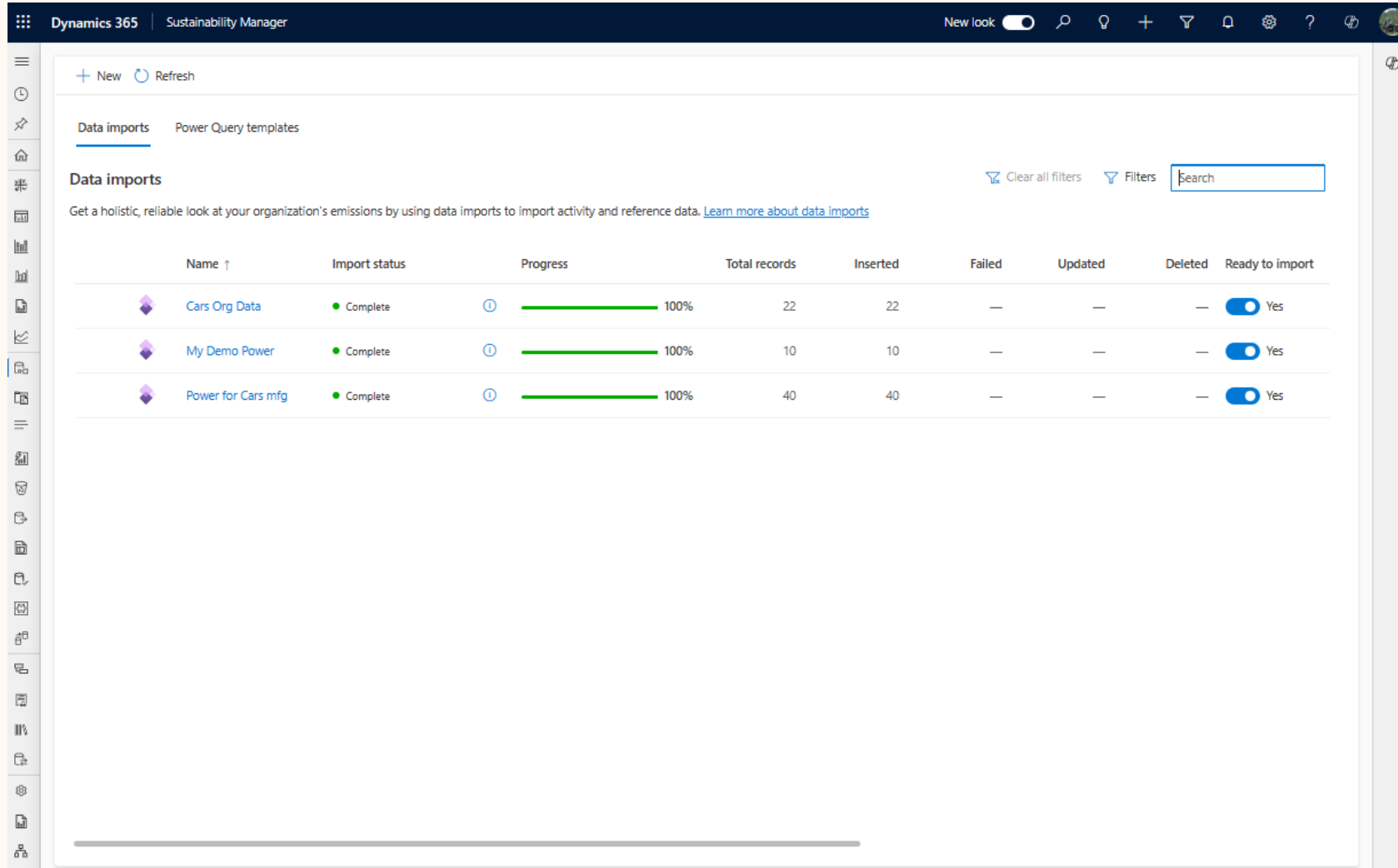


The screenshot displays the Dynamics 365 Sustainability Manager interface. The top navigation bar shows "Dynamics 365" and "Sustainability Manager". The main content area is titled "Data templates" and includes a search bar. Below the search bar, there is a table with the following columns: "Template Name", "Description", "Owner", "Created On", and "Data source".

Template Name ↑	Description	Owner	Created On	Data source
<a href="#">Demo Template 1</a>	—	 Eyal Schwartz	5/1/2024 5:46 PM	Purchased electricity

# Walkthrough Demo

- Expert PQ Designer → creates PQ Template in MSM ... Practitioner → uses template



The screenshot shows the Dynamics 365 Sustainability Manager interface. The top navigation bar includes 'Dynamics 365 | Sustainability Manager' and a 'New look' toggle. The main content area is titled 'Data imports' and includes a '+ New' and 'Refresh' button. Below the title, there are tabs for 'Data imports' and 'Power Query templates'. A search bar and 'Clear all filters' button are visible. A descriptive text states: 'Get a holistic, reliable look at your organization's emissions by using data imports to import activity and reference data. [Learn more about data imports](#)'. A table lists three data import items, each with a 'Ready to import' toggle set to 'Yes'.

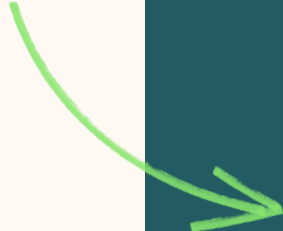
Name ↑	Import status	Progress	Total records	Inserted	Failed	Updated	Deleted	Ready to import
Cars Org Data	Complete	100%	22	22	—	—	—	Yes
My Demo Power	Complete	100%	10	10	—	—	—	Yes
Power for Cars mfg	Complete	100%	40	40	—	—	—	Yes

# Optional: Power Query Templates with Custom Connectors

- Third Party custom connectors may use this technology stack
- Two types of ingestion connector providers
  - Power Automate (PA)
  - Power Query Template (PQT)
- Advantages
  - Access provider data sources using provider's pre-canned connections (PQT or PA based)
  - Contains custom partner transformations and mapping
- Experience
  - Same as PQ Template – slot filling (not PQ transformation or mapping)



Thank you!



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[Import data with Power Query templates - Microsoft Cloud for Sustainability | Microsoft Learn](#)

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Q&A

Please type your questions **in the chat** and we will answer them during the Q&A session.



Have you used it already?  
What would you use it for?  
What would you like to see more?