

Quick Start Guide

Analysis Models - Power BI

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Pre-Requisites

Pre-Requisites

- Environment setup completed for Analysis Models – Power BI
- Power BI Desktop installed on the device being used

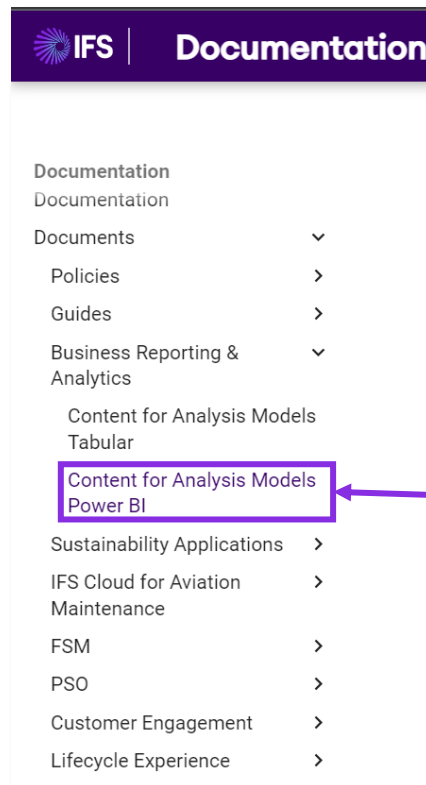
Step-by-step guide

Step-by-step guide

Setting up Golden Workspace

Navigate to Content for Analysis Models Power BI

- Follow the link <https://docs.ifs.com/> to IFS Docs and navigate to Content for Analysis Models Power BI page as shown.
- Documents > Business Reporting & Analytics > Content for Analysis Models Power BI



Navigate to Content for
Analysis Models Power BI

Download Relevant IFS Core model/ PBI Report

Navigate to the Knowledge base resources to view and download all released Models based on the functional area and IFS Version/ Service Update.

IFS Core Models

CRM

Model	24R1	24R2	25R1
CRM	CRM 24R1 V1 - SU06 CRM 24R1 V2 - SU11	CRM 24R2 V1 - GA CRM 24R2 V2 - SU05	CRM 25R1 V1 - EA CRM 25R1 V2 - GA

Financials

Model	24R1	24R2	25R1
Cash Planning	Not Applicable	CP 24R2 V1 - GA CP 24R2 V2 - SU05	CP 25R1 V1 - EA
General Ledger	GL 24R1 V1 - SU06	GL 24R2 V1 - GA GL 24R2 V2 - SU05	GL 25R1 V1 - EA

Functional Area

IFS Cloud Version/
Service Update

Models are available in the appropriate naming convention, and they will be downloaded in .pbix format.

community.ifs.com/announcements-notifications-280/content-for-analysis-models-power-bi-59876

IFS

Community

Resources

Product Updates

Events

Groups

Ideas

Feedback

Start a new topic

Recent Downloads

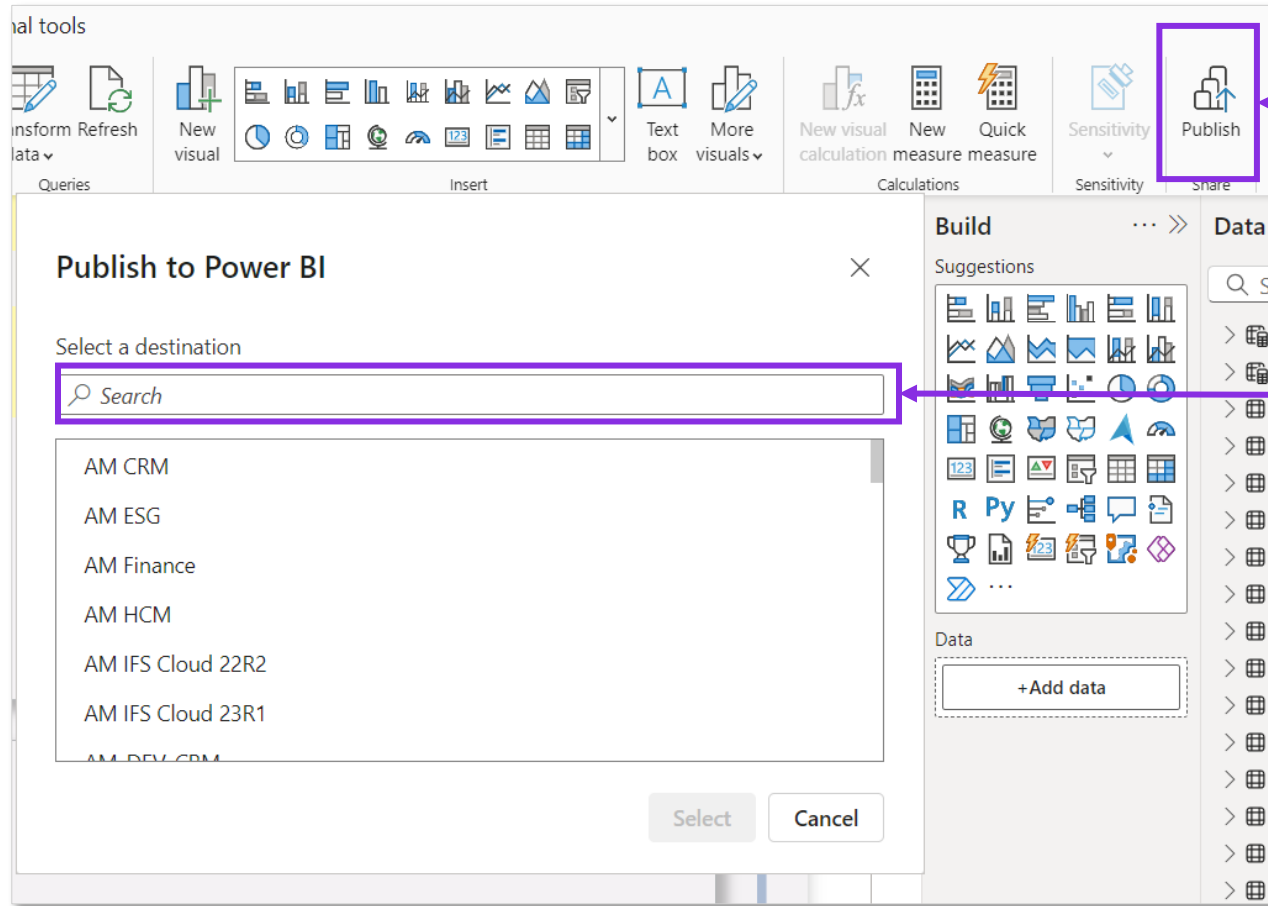
IFS_CRM_25R1_V2.pbix

941 KB • Done

Downloaded as
PBIX

Publish .PBIX into the Golden Workspace

Open the downloaded file and Publish it to the Golden Workspace.



The screenshot shows the Power BI Desktop interface. The 'Publish' button, located in the 'Share' tab of the ribbon, is highlighted with a purple box. A purple arrow points from this box to a purple callout box on the right that says 'Select Publish option'. Below the ribbon, the 'Publish to Power BI' dialog box is open. The 'Select a destination' section has a search bar with the text 'Search' inside, which is also highlighted with a purple box. A purple arrow points from this box to another purple callout box on the right that says 'Search Golden Workspace'. Below the search bar, a list of destinations is visible, including 'AM CRM', 'AM ESG', 'AM Finance', 'AM HCM', 'AM IFS Cloud 22R2', and 'AM IFS Cloud 23R1'. The 'Build' pane on the right side of the dialog box is also visible, showing various visual suggestions and a '+Add data' button.

Select Publish option

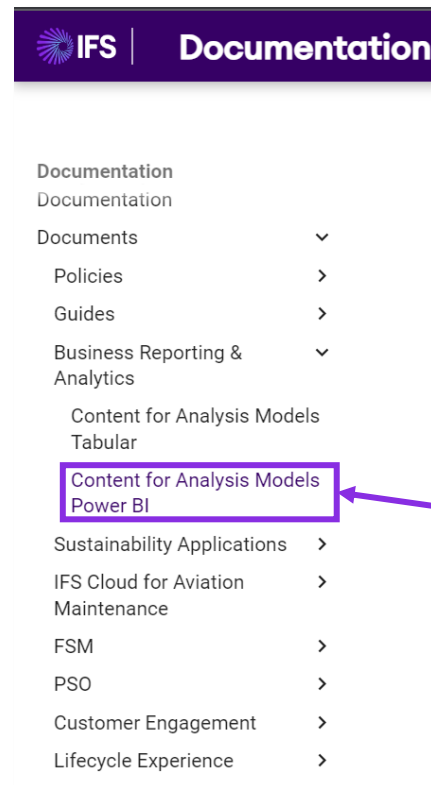
Search Golden Workspace

Step-by-step guide

Download Data Source Definitions

Navigate to Content for Analysis Models Power BI

- Follow the link <https://docs.ifs.com/> to IFS Docs and navigate to Content for Analysis Models Power BI page as shown.
- Documents > Business Reporting & Analytics > Content for Analysis Models Power BI



Navigate to Content for Analysis Models Power BI

Download Relevant Data Source Definition

Navigate to the Knowledge base resources to view and download the related Data Source Definitions based on the functional area and IFS Version/ Service Update.

Data Source Definitions

CRM

Model	24R1	24R2	25R1
CRM	CRM 24R1 - SU06	CRM 24R2 - GA	CRM 25R1 V1 CRM 25R1 V2

Financials

Model	24R1	24R2	25R1
Cash Planning	Not Applicable	CP 24R2 - SU05	CP 25R1 - EA
General Ledger	GL 24R1 - SU04	GL 24R2 - GA GL 24R2 V3 - SU09	GL 25R1 - EA GL 25R1 V2 - SU03
Group Reporting	Not Applicable	GR 24R2 - GA	Last modified: 24R2

Functional Area

IFS Cloud Version/
Service Update

Download the Data Source definition of the required model (.json file).

community.ifs.com/announcements-notifications-280/content-for-analysis-models-power-bi-59876

Data Source Definitions

CRM

Recent Downloads

dataSourceExport_CRM_V2.json

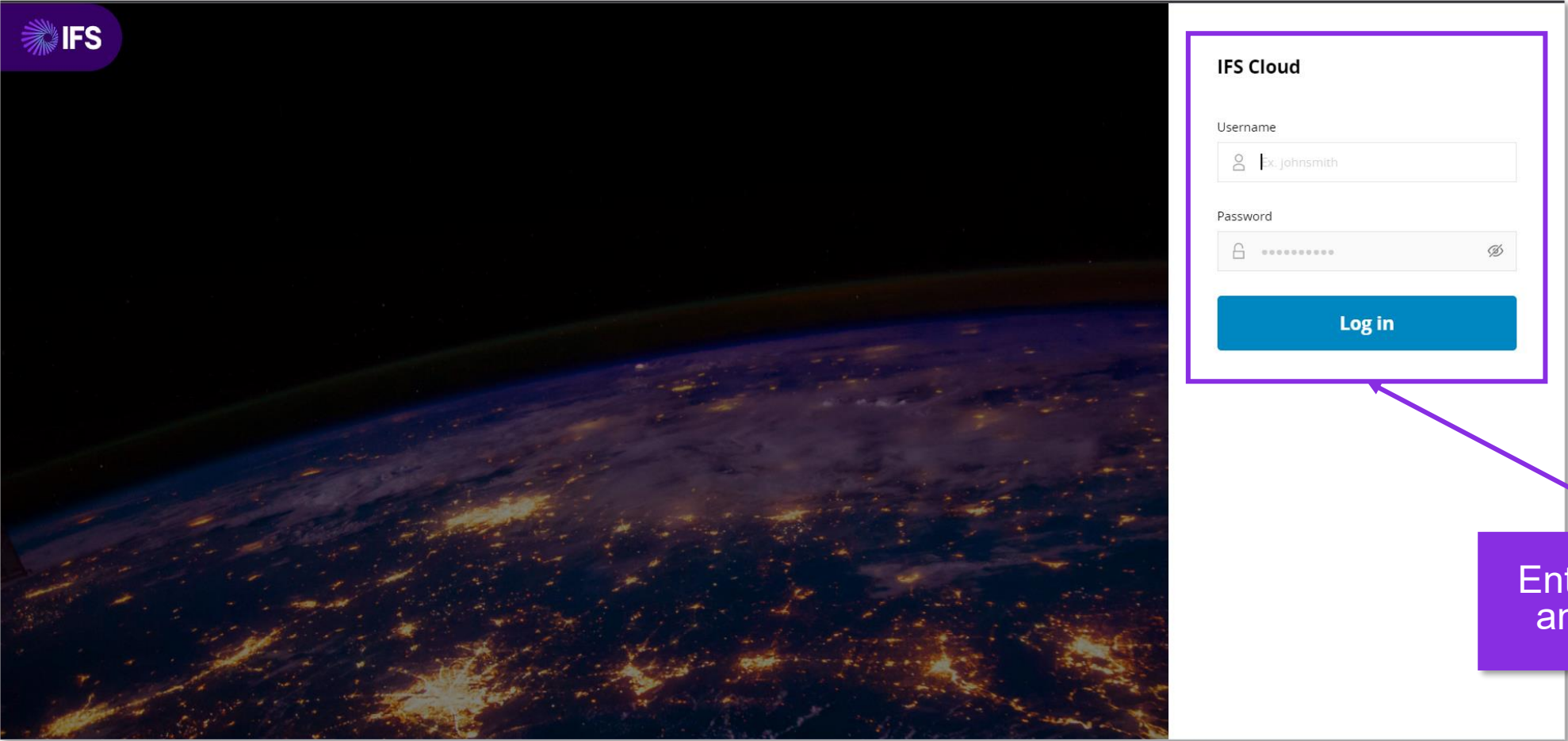
114 KB • Done

Downloaded as
.json

Step-by-step guide

Import Data Sources

Sign into IFS Cloud



Enter Username
and Password

Navigate to Parquet Data Sources Page

- Follow the navigation steps below.
- Solution Manager> Reporting and Analysis > Data Services> Data Source Management> Data Sources

The screenshot shows the 'Parquet Data Source' page. The left sidebar has a search bar and a navigation menu with 'Data Sources' selected. The main content area has a search bar and a table of data sources.

	Name	Source Name	Source Origin	Source Type	Area	Max Age	Last Refreshed	Load Status	Explicit Load	Load Type
☐	FACT_BUSINESS_LEAD	FACT_BUSINESS_LEAD_...	Information Source	Fact	CRM	1	270 hours ago	Success	No	Full
☐	DIM_RETURN_MATERIAL_REAS...	DIM_RETURN_MATERIA...	Information Source	Dimension	Shared	120	270 hours ago	Success	No	Full
☐	DIM_RETURN_MATERIAL_REAS...	DIM_RETURN_MATERIA...	Information Source	Dimension	Sales	120	270 hours ago	Success	No	Full

Navigate to
Parquet Data
Source page

Open Import Parquet Data Source Page

Find page

< ... / Reporting and Analysis / Data Services

Data Sources

Data Sources

Data Source Detail

Parquet Data Source

Q Search

Add New Data Source **Import**

	Name	Source Name	Source Origin	Source Type	Area	Max Age	Last Refreshed	Load Status	Explicit Load	Load Type
☐	FACT_BUSINESS_LEAD	FACT_BUSINESS_LEAD_...	Information Source	Fact	CRM	1	270 hours ago	Success	No	Full
☐	DIM_RETURN_MATERIAL_REAS...	DIM_RETURN_MATERIA...	Information Source	Dimension	Shared	120	270 hours ago	Success	No	Full
☐	DIM_RETURN_MATERIAL_REAS...	DIM_RETURN_MATERIA...	Information Source	Dimension	Sales	120	270 hours ago	Success	No	Full

Import Parquet Data Source

Data source Import Details

Choose The .json File To Be Uploaded

Use Imported Parquet Data Source Entries To Overwrite/Rename Existing Entries

☐

Import Cancel

Select Import button

Select the icon to upload the .json file

Import the Data Source Definition

Solution Manager > Reporting and Analysis > Data Services > Data Source Management > Data Sources > Parquet Data Source

Import Parquet Data Source

Data source Import Details

Choose The .json File To Be Uploaded

dataSourceExport_General_Ledger.json

Use Imported Parquet Data Source Entries To Overwrite/Rename Existing Entries

☒

Import Cancel

Switch toggle based on the requirement

Select Import button

Solution Manager > Reporting and Analysis > Data Services > Data Source Management > Data Sources > Parquet Data Source

Import Parquet Data Source

Data source Import Details

Choose The .json File To Be Uploaded

dataSourceExport_General_Ledger.json

Use Imported Parquet Data Source Entries To Overwrite/Rename Existing Entries

☐

Import Cancel

Confirmation to Import

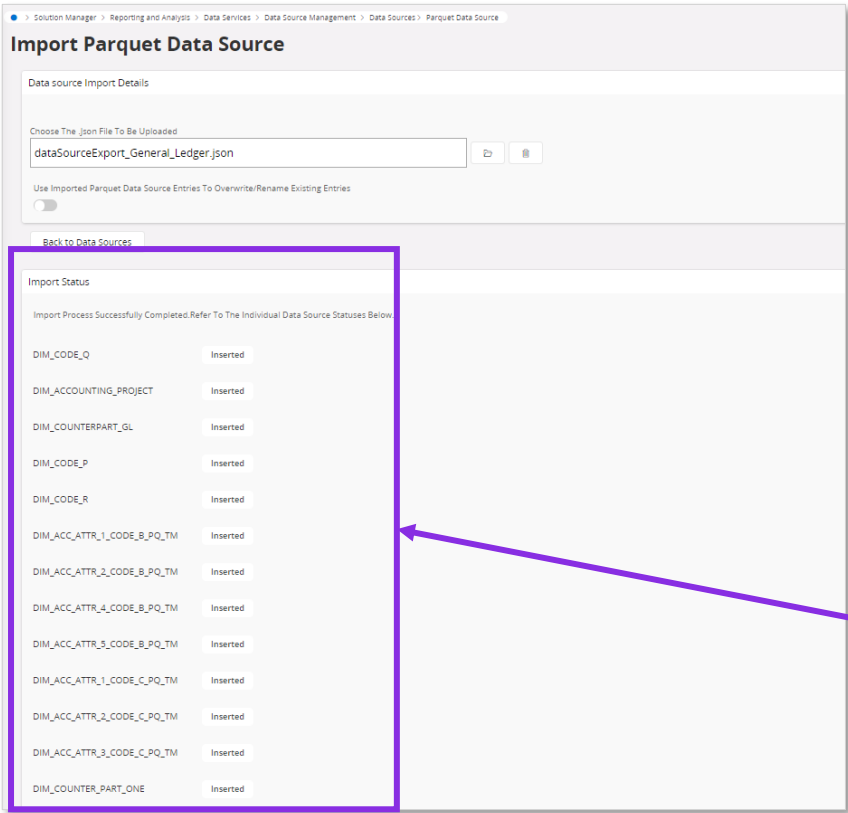
Are you sure you need to import the Parquet data source entries without overwrite/rename existing entries?

Yes No

Confirm

View Import Status

Import status is updated against each Data Source accordingly.



Import Status	Description
NoAction	Imported successfully, if there are existing entries(same Data Source ID), it is not updated
Updated	Imported successfully, if there are existing entries(same Data Source ID), it is updated
Inserted	Imported all the new entries successfully
Error	Import Errors

View Import status

Use **Back to Data Sources** button to return to Parquet Data Source page.