

# 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

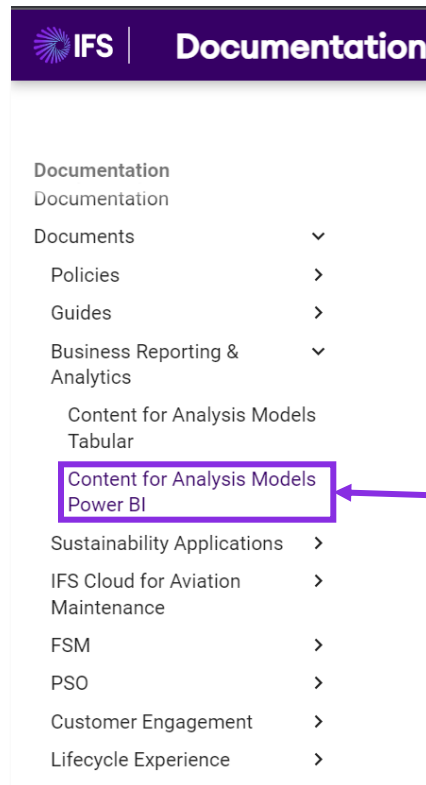
# Step-by-step guide

# 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

Select and download the relevant item based on functional area and IFS Cloud version

The screenshot shows two tables. The first table, titled "IFS Core Models", has a "CRM" tab selected. Below it is a table with columns "Model", "24R1", and "24R2", and rows "CRM", "CRM 24R1", and "CRM 24R2". The second table, titled "Financials", has columns "Model", "24R1", and "24R2", and rows "Cash Planning", "General Ledger", and "Group Reporting". Callout boxes point to the "CRM" tab and the "24R1" column header.

Model	24R1	24R2
CRM	CRM 24R1	CRM 24R2

Model	24R1	24R2
Cash Planning	Not Applicable	CP 24R2
General Ledger	GL 24R1	GL 24R2
Group Reporting	Not Applicable	GR 24R2

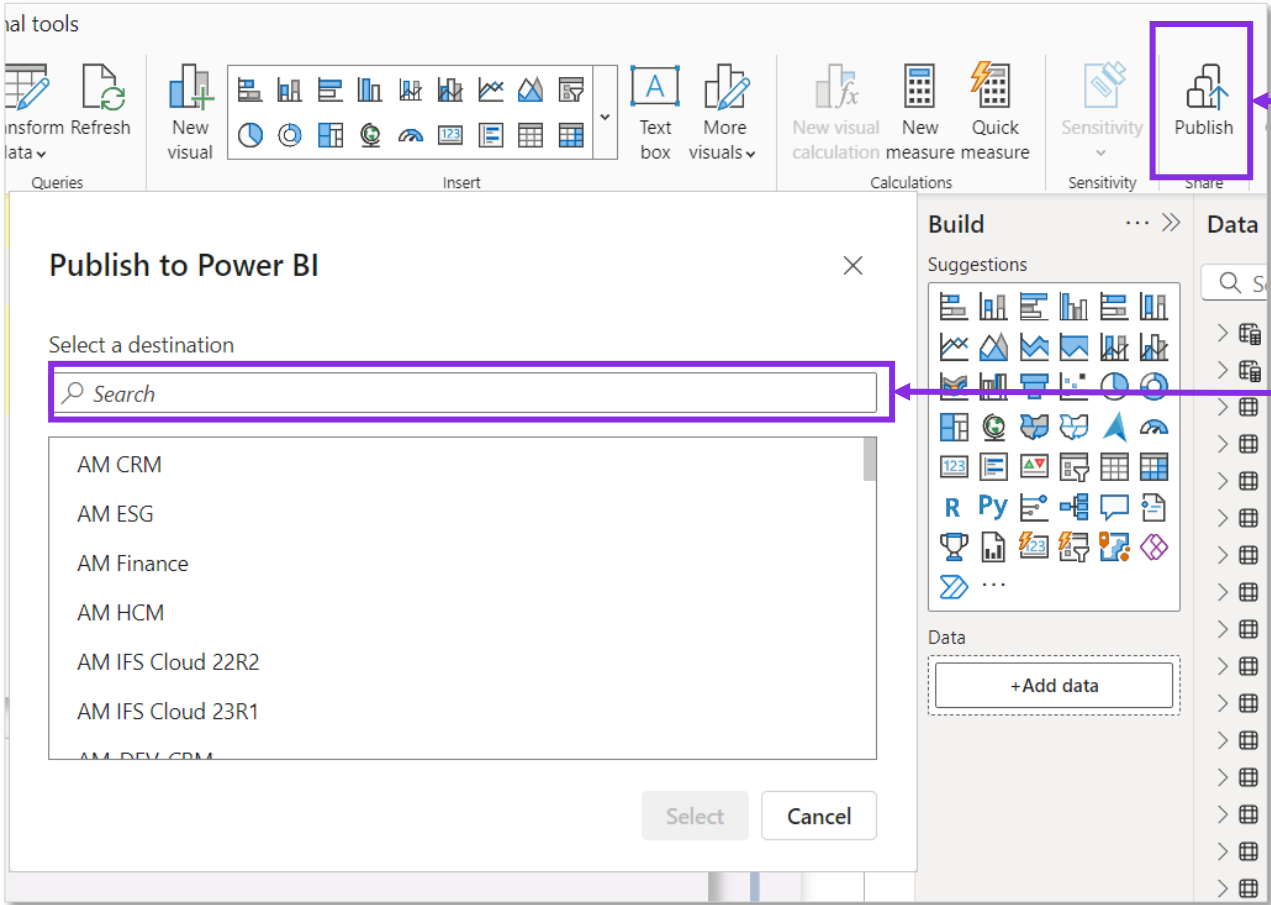
Models are available in the appropriate naming convention, and they will be downloaded in .pbix format.

The screenshot shows a browser window with the URL docs.ifs.com/Analysis%20Models%20Power%20BI%20Content/. The page title is "Content for Analysis Models Power BI" and the content area shows "Financials". A "Recent Downloads" notification is visible, showing a file named "IFS\_General\_Ledger\_24R1\_V1.pbix" with a size of 654 KB and a download time of 3 minutes ago. A callout box points to the file name.



# Publish .PBIX into the Golden Workspace

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



Select Publish option

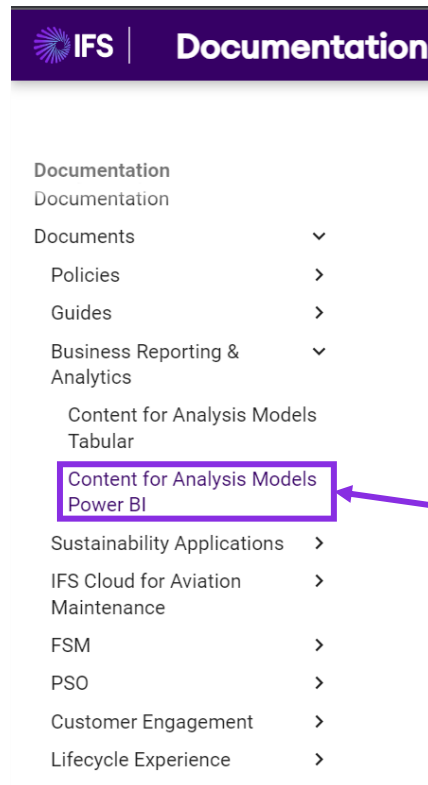
Search Golden Workspace

# 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

Select and download the relevant item based on functional area and IFS Cloud version.

**Data Source Definitions**

<b>CRM</b>	24R1	24R2
CRM	<a href="#">CRM 24R1</a>	<a href="#">CRM 24R2</a>

**Financials**

<b>Model</b>	<b>24R1</b>	<b>24R2</b>
Cash Planning	Not Applicable	<a href="#">CP 24R2</a>
General Ledger	<a href="#">GL 24R1</a>	<a href="#">GL 24R2</a>
Group Reporting	Not Applicable	<a href="#">GR 24R2</a>

Functional Area


IFS Cloud Version

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

**Content for Analysis Models Power BI**

Cash Planning	Not Applicable	<a href="#">CP 24R2</a>
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Recent Downloads

 <a href="#">dataSourceExport_General_Ledger.json</a>
76.2 KB • Done

Downloaded as .json

# Step-by-step guide

## Import Data Sources

# Sign into IFS Cloud



The screenshot shows the IFS Cloud login interface. On the left, there is a dark background with a satellite view of Earth at night, showing city lights. In the top-left corner, the IFS logo is displayed. On the right, a white login form is overlaid. The form is titled "IFS Cloud" and contains two input fields: "Username" with the text "johsmith" and "Password" with masked characters. Below the fields is a blue "Log in" button. A purple callout box with an arrow points to the login form, containing the text "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 displays the 'Parquet Data Source' page in Solution Manager. The breadcrumb navigation is: Solution Manager > Reporting and Analysis > Data Services > Data Source Management > Data Sources. The page title is 'Parquet Data Source'. Below the title is a search bar and two buttons: 'Add New Data Source' and 'Import'. A table lists three data sources:

	Name	Source Name	Source Origin	Source Type	Area	Max Age	Last Refreshed	Load Status	Explicit Load	Load Type
<input type="checkbox"/>	FACT_BUSINESS_LEAD	FACT_BUSINESS_LEAD_...	Information Source	Fact	CRM	1	270 hours ago	Success	No	Full
<input type="checkbox"/>	DIM_RETURN_MATERIAL_REAS...	DIM_RETURN_MATERIA...	Information Source	Dimension	Shared	120	270 hours ago	Success	No	Full
<input type="checkbox"/>	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

Add New Data Source **Import**

	Name	Source Name	Source Origin	Source Type	Area	Max Age	Last Refreshed	Load Status	Explicit Load	Load Type
<input type="checkbox"/>	FACT_BUSINESS_LEAD	FACT_BUSINESS_LEAD_...	Information Source	Fact	CRM	1	270 hours ago	Success	No	Full
<input type="checkbox"/>	DIM_RETURN_MATERIAL_REAS...	DIM_RETURN_MATERIA...	Information Source	Dimension	Shared	120	270 hours ago	Success	No	Full
<input type="checkbox"/>	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



# 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

Import Process Successfully Completed. Refer To The Individual Data Source Statuses Below.

DIM_CODE_Q	Inserted
DIM_ACCOUNTING_PROJECT	Inserted
DIM_COUNTERPART_GL	Inserted
DIM_CODE_P	Inserted
DIM_CODE_R	Inserted
DIM_ACC_ATTR_1_CODE_B_PO_TM	Inserted
DIM_ACC_ATTR_2_CODE_B_PO_TM	Inserted
DIM_ACC_ATTR_4_CODE_B_PO_TM	Inserted
DIM_ACC_ATTR_5_CODE_B_PO_TM	Inserted
DIM_ACC_ATTR_1_CODE_C_PO_TM	Inserted
DIM_ACC_ATTR_2_CODE_C_PO_TM	Inserted
DIM_ACC_ATTR_3_CODE_C_PO_TM	Inserted
DIM_COUNTER_PART_ONE	Inserted

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.