

Quick Start Guide

Analysis Models - Tabular Model

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Pre-Requisites

Pre-Requisites

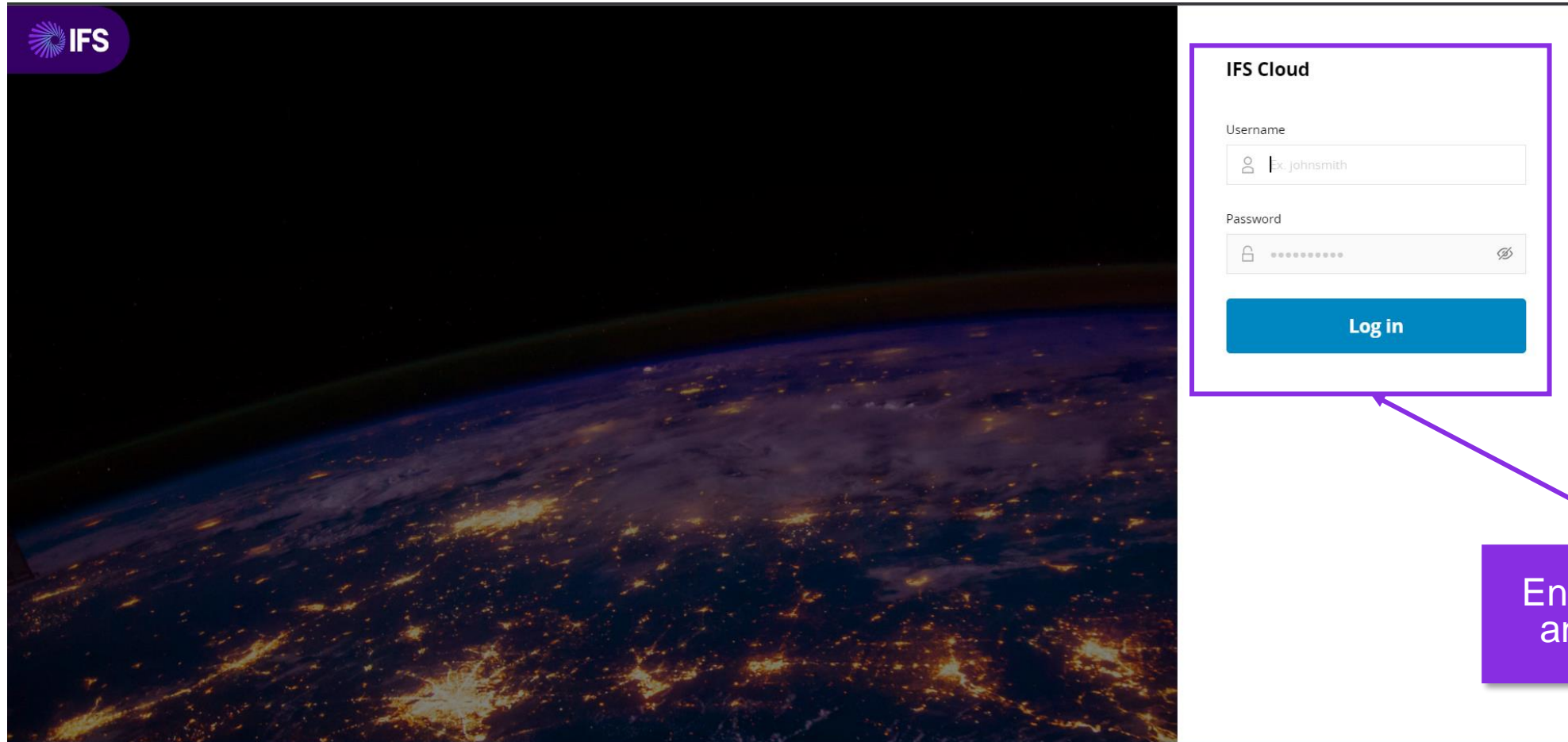
- Environment setup completed for IFS Cloud – Analysis Models
- Data Configurations completed for relevant Tabular Model
- Power BI Desktop installed on the device being used
- Power BI Desktop is available for free on the Microsoft Store
- Enable Q&A feature in Power BI Desktop

Step-by-step guide

Step-by-step guide

Setting up Tabular Models

Sign into IFS Cloud



IFS Cloud

Username

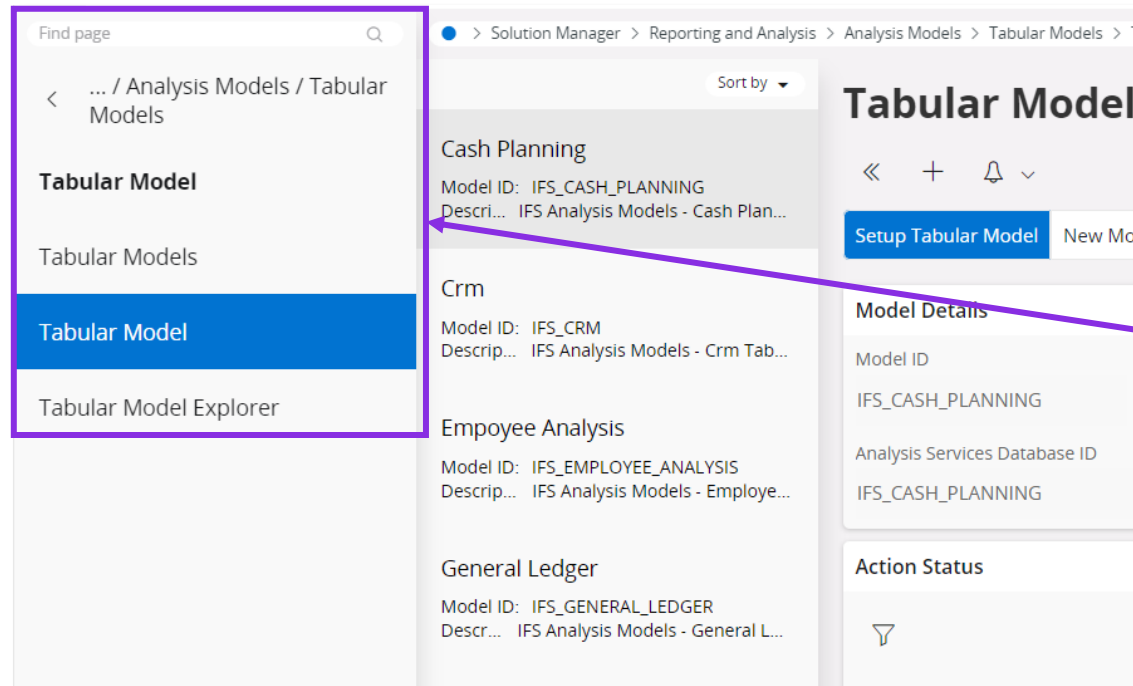
Password

[Log in](#)

Enter Username and Password

Navigate to Tabular Models

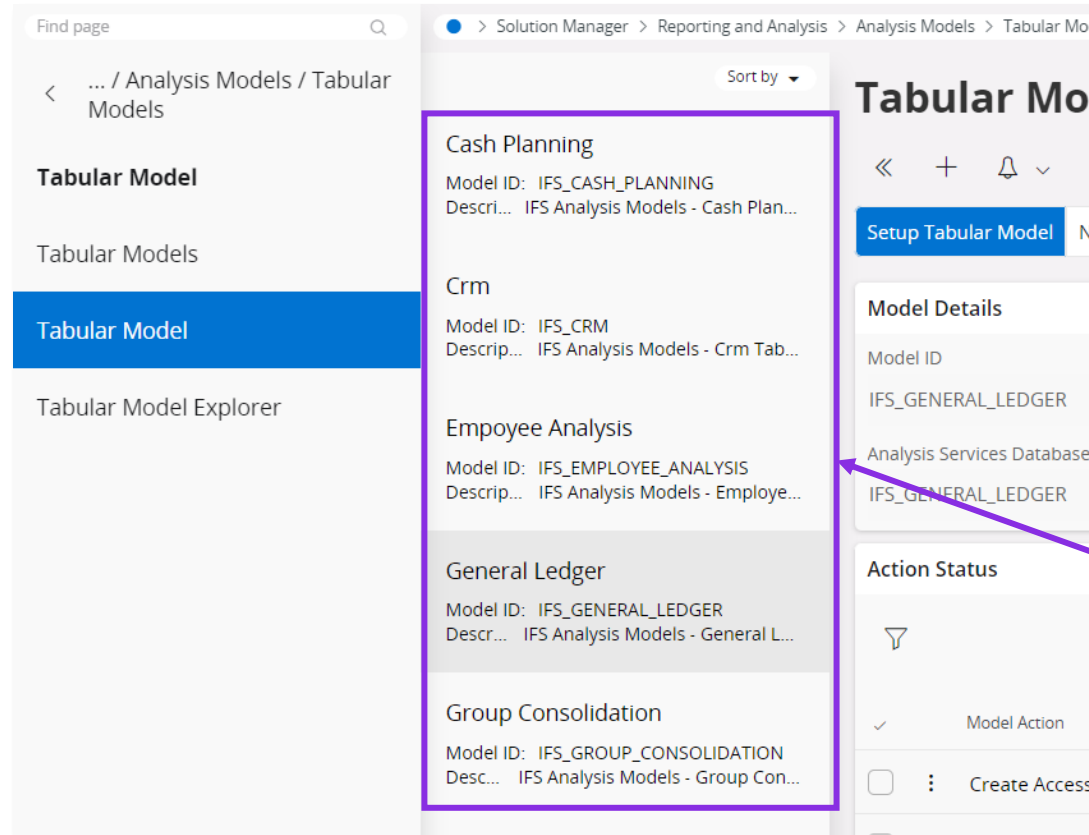
- Follow the navigation steps below
 - Solution Manager>Reporting and Analysis > Analysis Models > Tabular Models > Tabular Model



Navigate to
Tabular Model

Select Tabular Model

Select desired Tabular Model from the highlighted section



Setup Tabular Model

The screenshot shows the IFS Analysis Models interface. The left sidebar contains a search bar and a list of models. The main area displays the 'General Ledger - IFS_GENERAL_LEDGER - IFS Analysis' model details. A red box highlights the 'Setup Tabular Model' button, and a red arrow points to it from a callout box on the right.

Find page

< ... / Analysis Models / Tabular Models

Tabular Model

Tabular Models

Tabular Model

Tabular Model Explorer

Sort by ▼

Cash Planning
Model ID: IFS_CASH_PLANNING
Descri... IFS Analysis Models - Cash Plan...

Crm
Model ID: IFS_CRM
Descri... IFS Analysis Models - Crm Tab...

Employee Analysis
Model ID: IFS_EMPLOYEE_ANALYSIS
Descri... IFS Analysis Models - Emplo...

General Ledger
Model ID: IFS_GENERAL_LEDGER
Descri... IFS Analysis Models - General L...

Tabular Model General Ledger - IFS_GENERAL_LEDGER - IFS Analysis

« + 🔔 ▼

Setup Tabular Model New Model Process Definition Create Configuration Exclude

Model Details

Model ID	Name
IFS_GENERAL_LEDGER	General Ledger


Analysis Services Database ID	Analysis Services Database ID
IFS_GENERAL_LEDGER	IFS_GENERAL_LEDGER

Action Status

🔍

Click to initiate
setup

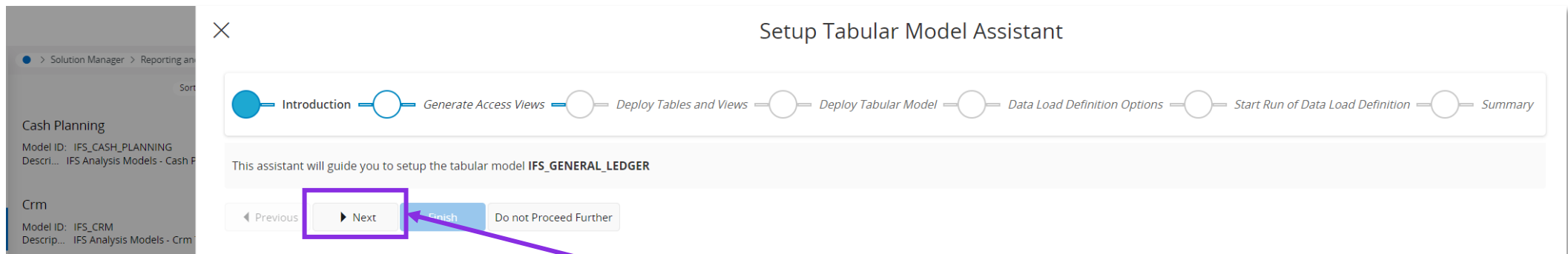
Configurations prompt

 Setup Tabular Model

Please remember to define data load configuratons before setting up a tabular model. Do you want to navigate to data load configurations?

Click "NO" to move to wizard

Tabular Model Wizard



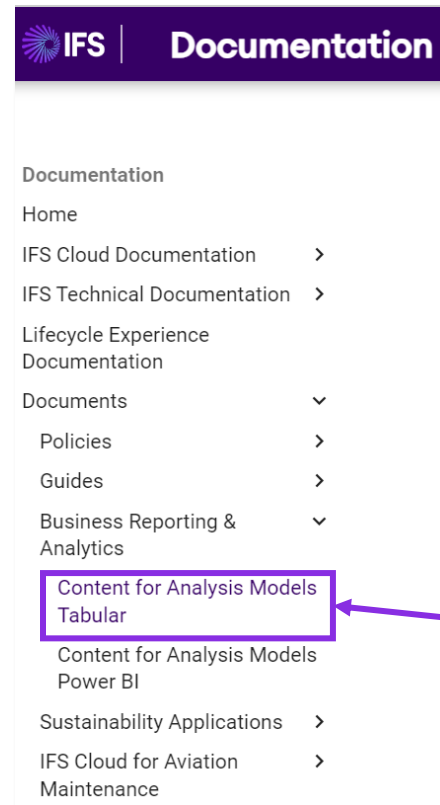
Follow Instructions
on Wizard

Step-by-step guide

Download Power BI Files

Navigate to Content for Analysis Models - Tabular

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



Navigate to Content for Analysis Models - Tabular

Download Relevant PBI Report

Select and download the relevant Power BI report based on functional area and IFS Cloud version

Power BI Sample Reports

CRM

Model	21R2	22R1	22R2	23R1	23R2	24R1
CRM	Not Applicable	CRM 22R1	CRM 22R2	CRM 23R1	CRM 23R2	Last modified 23R2

Financials

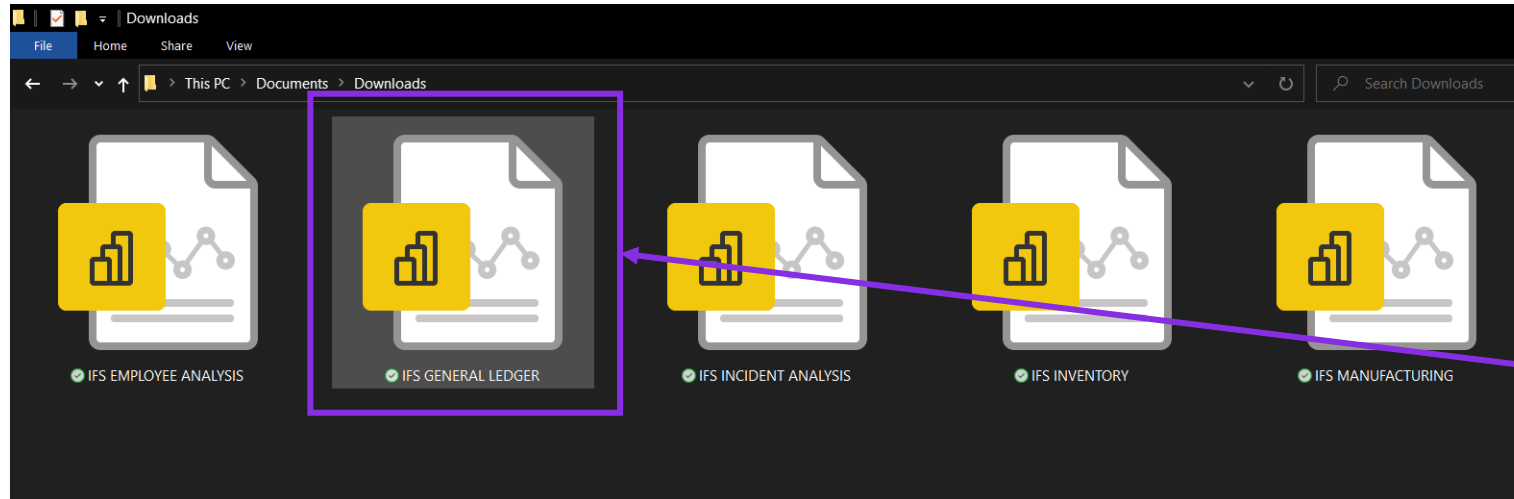
Model	21R2	22R1	22R2	23R1	23R2	24R1
Cash Planning	Not Applicable	Not Applicable	CP 22R2	CP 23R1	CP 23R2	Last modified 23R2
General Ledger	GL 21R2	Last modified: 21R2	GL 22R2	GL 23R1	GL 23R2	Last modified 23R2

Functional Area

IFS Cloud Version

Open Power BI Report

Navigate to the downloaded location and open the Power BI Report



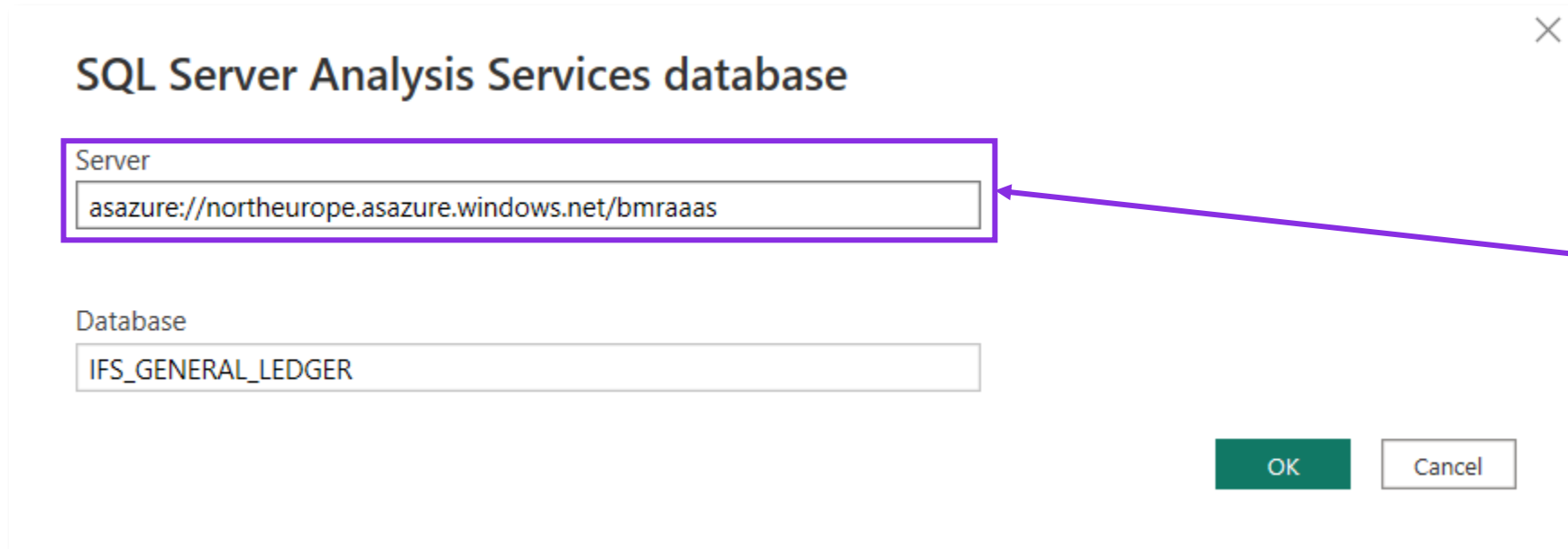
Open relevant file

Step-by-step guide

Configure the data source

Enter server location

- Once the file is opened the data source configuration window would pop-up
- Enter location of Azure/SQL Analysis Server and click “OK”
 - eg : asazure://northeurope.asazure.windows.net/example-server



SQL Server Analysis Services database

Server
asazure://northeurope.asazure.windows.net/bmraaas

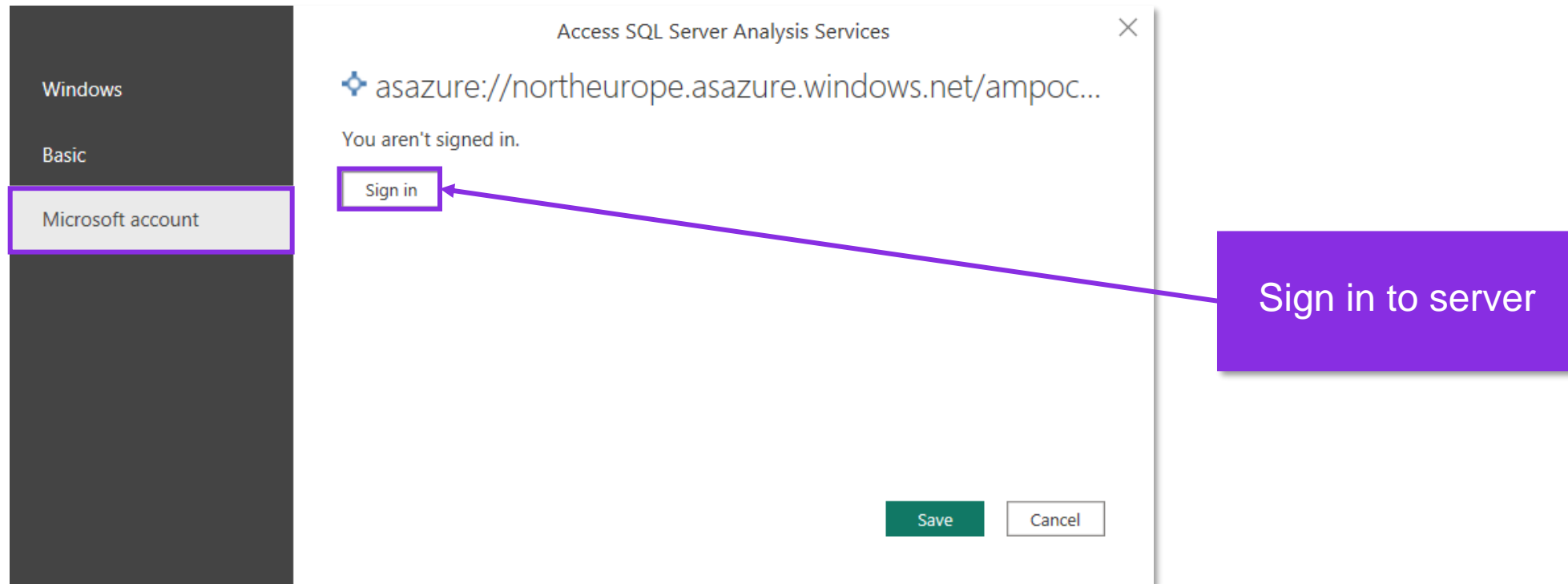
Database
IFS_GENERAL_LEDGER

OK Cancel

Enter server location

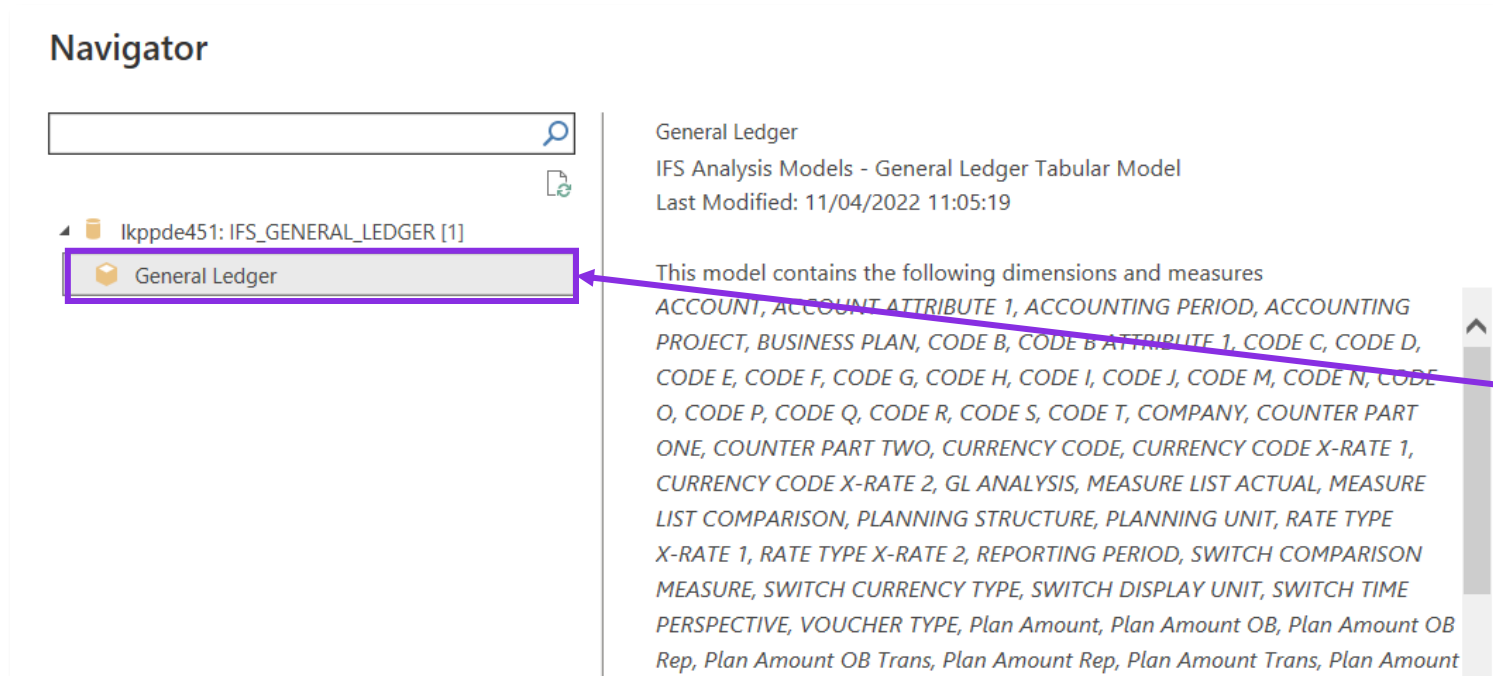
Provide Login Credentials

- Enter relevant credentials based on configuration and click on “Save”.
- Note : If this window does not pop up you have already been signed into the relevant location. Please proceed to the next step



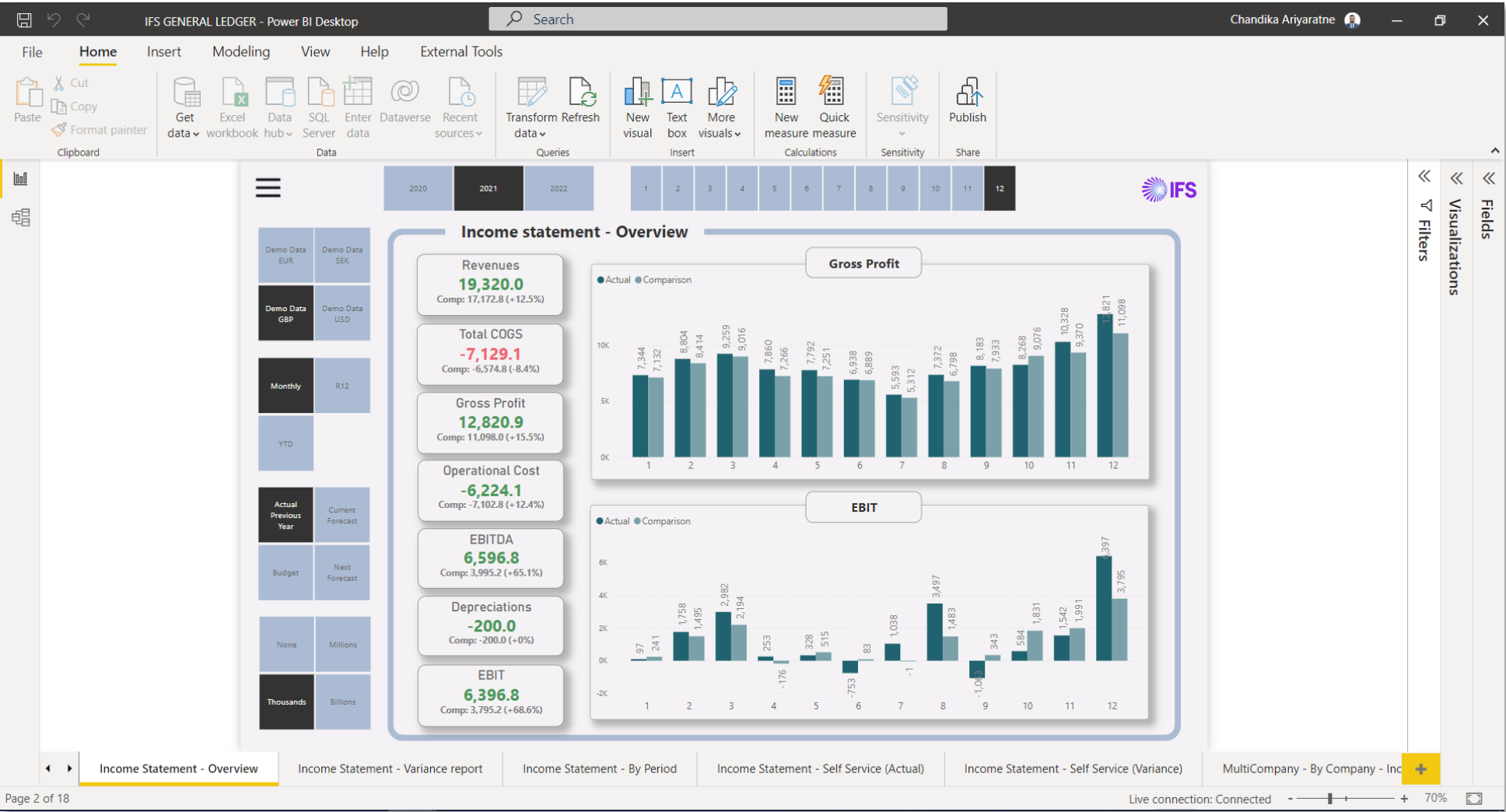
Select from Navigator

The Navigator will pop up. Make the relevant selection according to the model and click “OK”



Select the model
and click “OK”

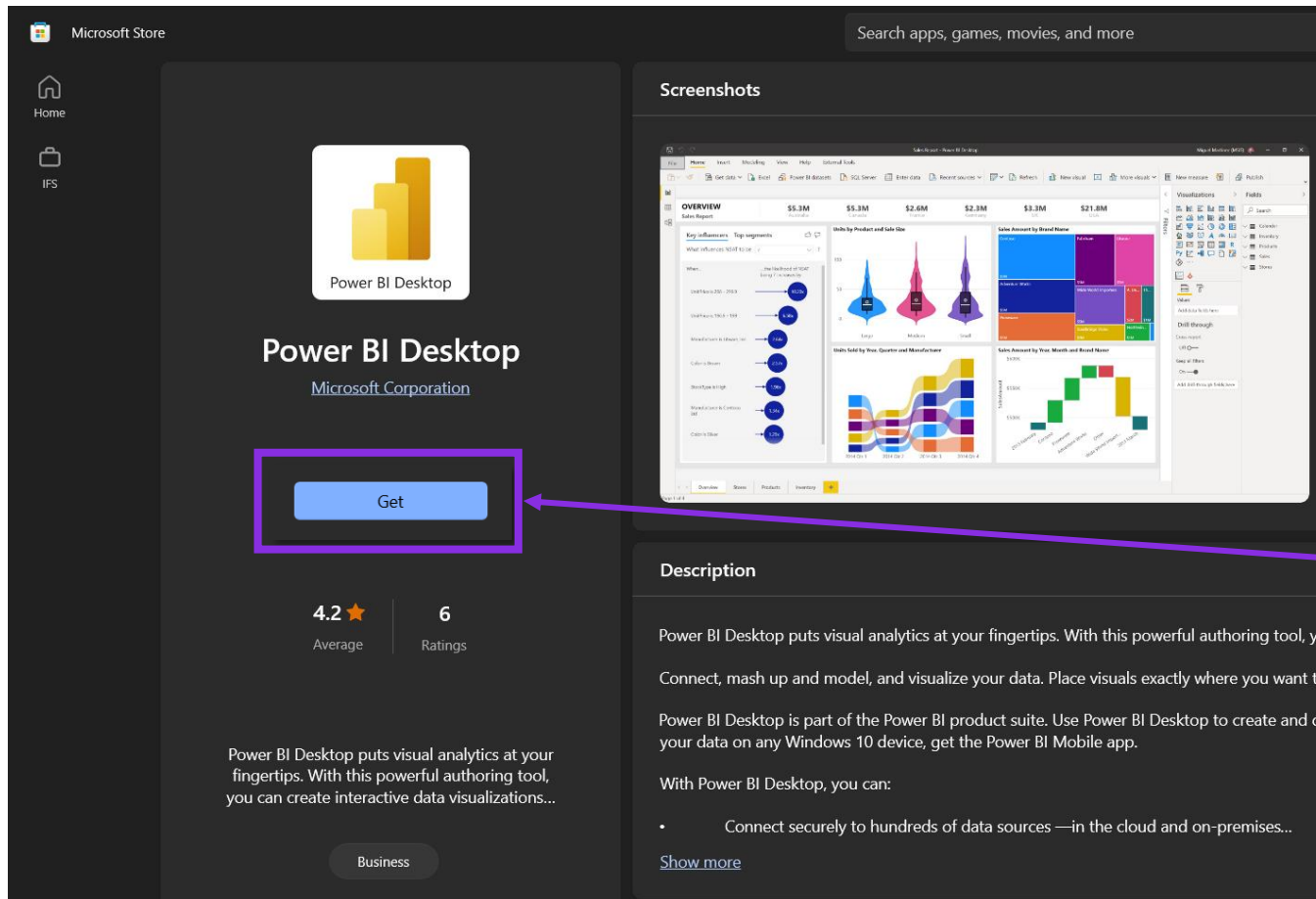
Model Load



Miscellaneous

Install Power BI Desktop (Free)

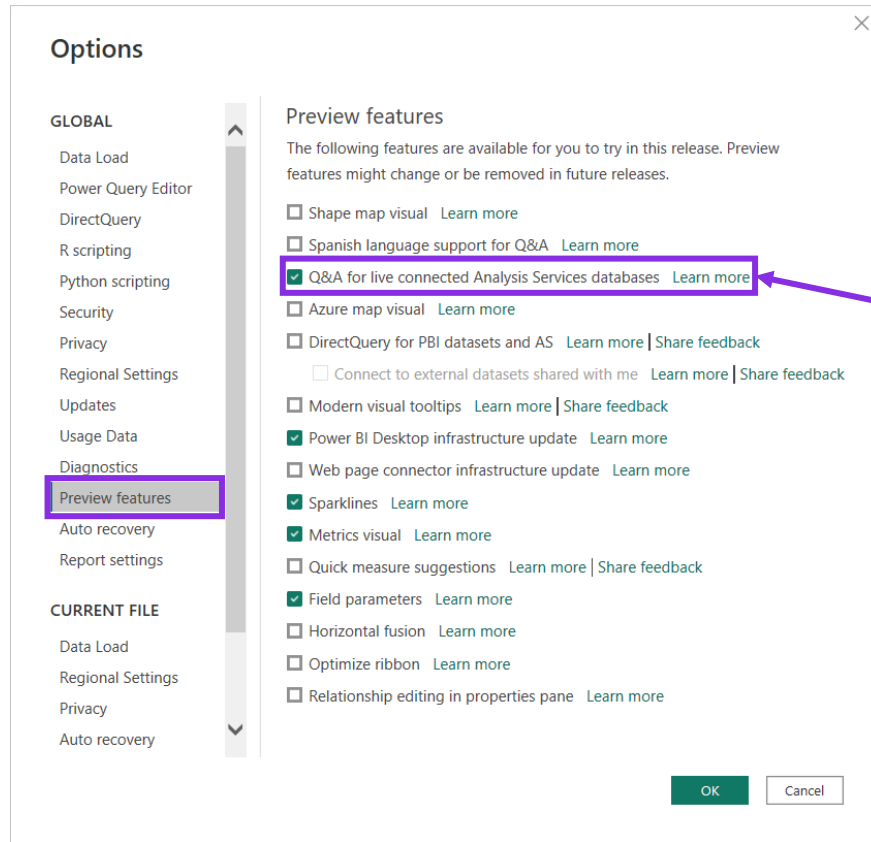
Follow the link <https://aka.ms/pbidesktopstore> which will take you to the Microsoft Store.



Click on "Get" to download

Enable Q&A in Power BI Desktop

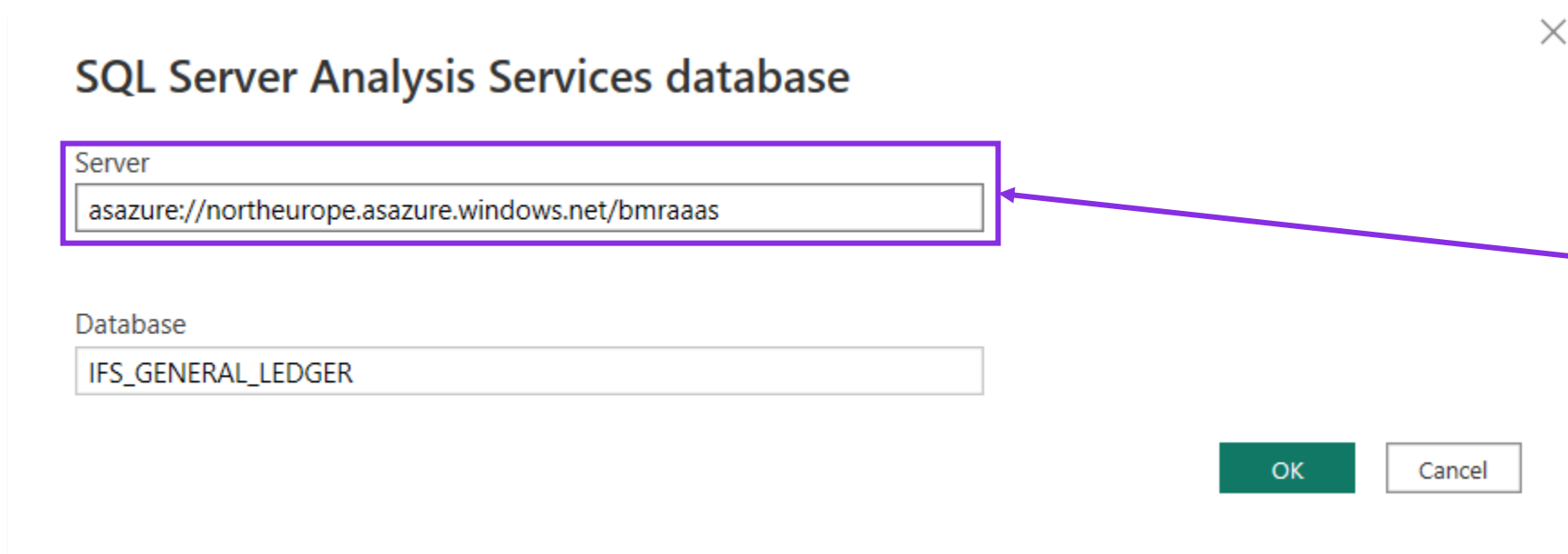
- Once Power BI is opened follow these steps.
 - File>Options and settings>Options



Select the option
and click on "OK"

Change data source manually

- If it is required to manually change the data source, follow the instructions below
 - Transform Data > Data source settings
- Enter the relevant server location and click OK



SQL Server Analysis Services database

Server

asazure://northeurope.asazure.windows.net/bmraaas

Database

IFS_GENERAL_LEDGER

OK Cancel

Enter server location