

# Quick Start Guide

Power BI Sample Content

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# Pre-Requisites

# Pre-Requisites

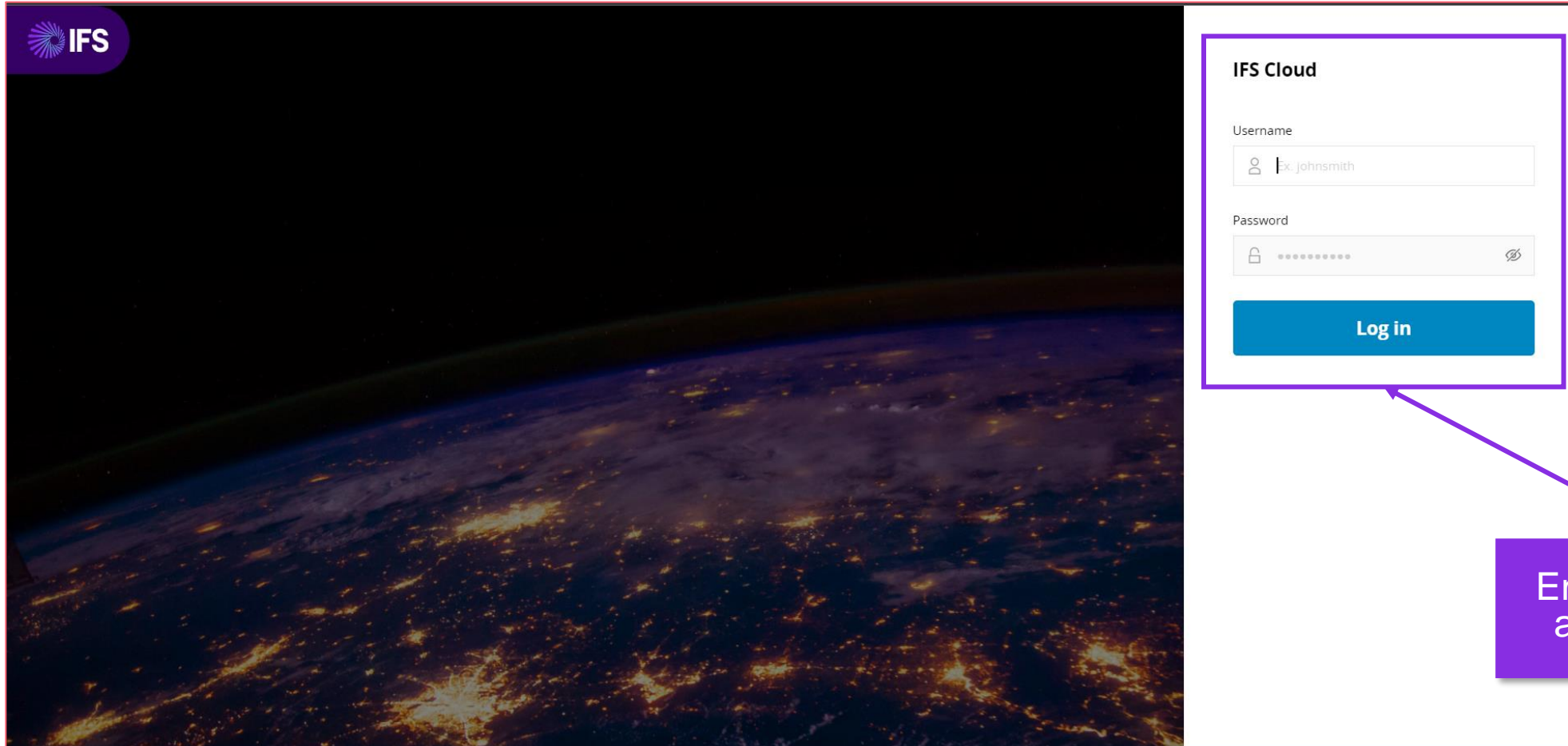
- Environment setup completed for IFS Cloud – Analysis Models
- Data Configurations completed for relevant Tabular Model
- Power BI Desktop installed on the device being used
- Power BI Desktop is available for free on the Microsoft Store
- Enable Q&A feature in Power BI Desktop

# Step-by-step guide

# Step-by-step guide

## Setting up tabular model


# Sign into IFS Cloud





IFS

**IFS Cloud**

Username

 johnsmith

Password

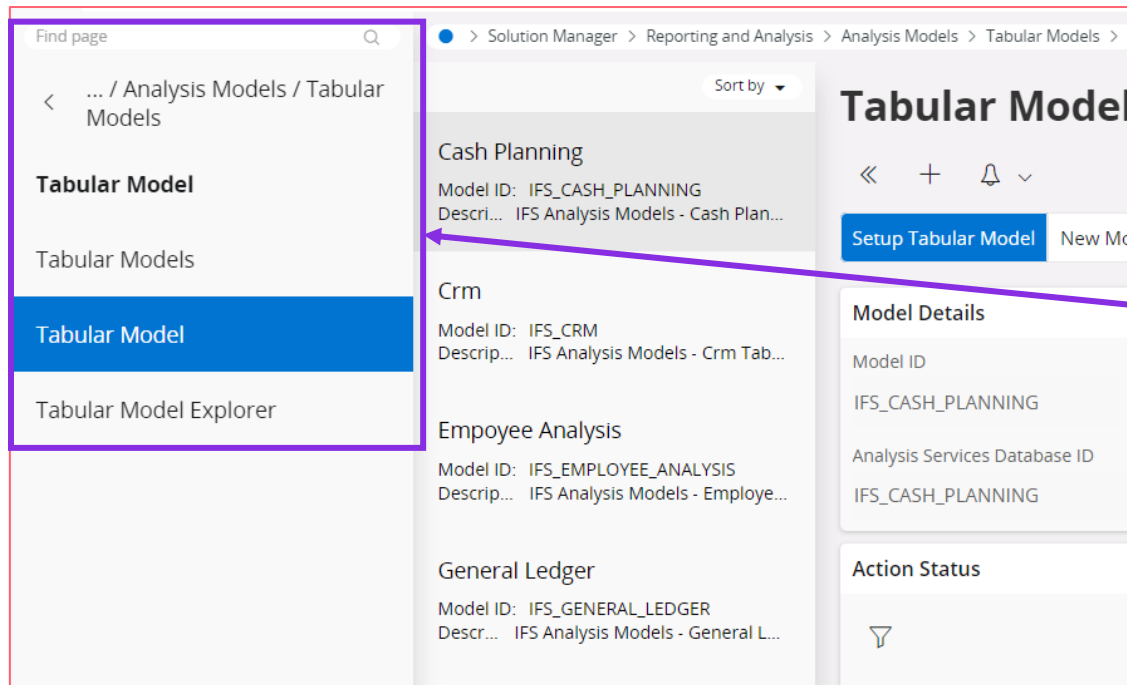
 ..... 

**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

The screenshot displays the IFS Solution Manager interface for selecting a tabular model. The left sidebar shows the navigation menu with 'Tabular Model' highlighted. The main content area lists several models, with 'General Ledger' highlighted by a blue bar. A purple box highlights the 'Employee Analysis' model, and a purple arrow points from a 'Select Model' callout box to it.

Model Name	Model ID	Description
Cash Planning	IFS_CASH_PLANNING	IFS Analysis Models - Cash Plan...
Crm	IFS_CRM	IFS Analysis Models - Crm Tab...
Employee Analysis	IFS_EMPLOYEE_ANALYSIS	IFS Analysis Models - Employee...
General Ledger	IFS_GENERAL_LEDGER	IFS Analysis Models - General L...
Group Consolidation	IFS_GROUP_CONSOLIDATION	IFS Analysis Models - Group Con...

# Setup Tabular Model

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  
Descrip... IFS Analysis Models - Crm Tab...

Employee Analysis  
Model ID: IFS\_EMPLOYEE\_ANALYSIS  
Descrip... IFS Analysis Models - Emplo...

General Ledger  
Model ID: IFS\_GENERAL\_LEDGER  
Descr... IFS Analysis Models - General L...

Tabular Model

General Ledger - IFS\_GENERAL\_LEDGER - IFS Analysis

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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 N
IFS_GENERAL_LEDGER	IFS_GENERAL_LEDGER

Action Status

🔍

Click to initiate setup

# Configurations prompt

 Setup Tabular Model

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

Click "NO" to move to wizard

# Tabular Model Wizard

The screenshot shows the 'Setup Tabular Model Assistant' window. On the left is a sidebar with a tree view containing 'Cash Planning' (Model ID: IFS\_CASH\_PLANNING) and 'Crm' (Model ID: IFS\_CRM). The main area has a progress bar with steps: Introduction (active), Generate Access Views, Deploy Tables and Views, Deploy Tabular Model, Data Load Definition Options, Start Run of Data Load Definition, and Summary. Below the progress bar, text states: 'This assistant will guide you to setup the tabular model IFS\_GENERAL\_LEDGER'. At the bottom are four buttons: 'Previous', 'Next' (highlighted with a red box), 'Finish', and 'Do not Proceed Further'.

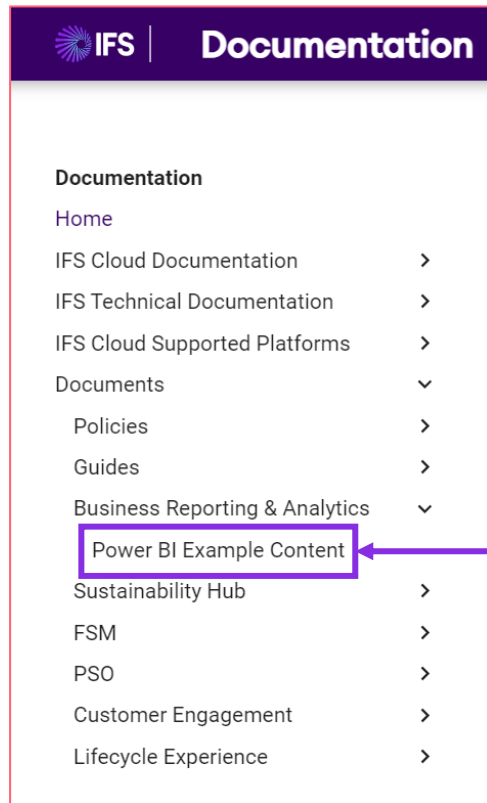
Follow Instructions  
on Wizard

# Step-by-step guide

## Download Power BI Files

# Navigate to Power BI Samples

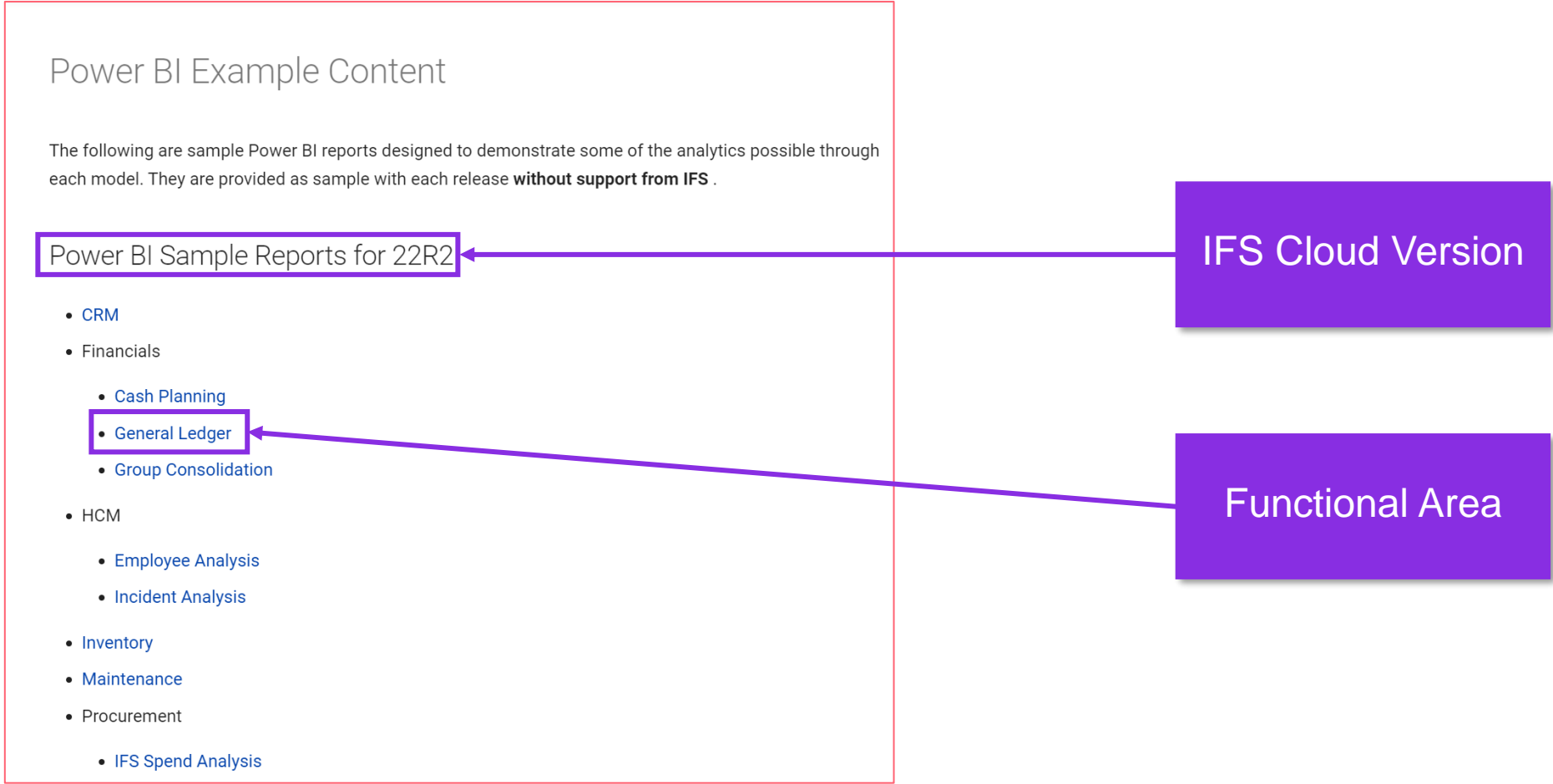
- Follow the link <https://docs.ifs.com/> to IFS Docs and navigate to Power BI Example Content page as shown
  - Documents > Business Reporting & Analytics > Power BI Example Content



Navigate to Power  
BI Example  
Content

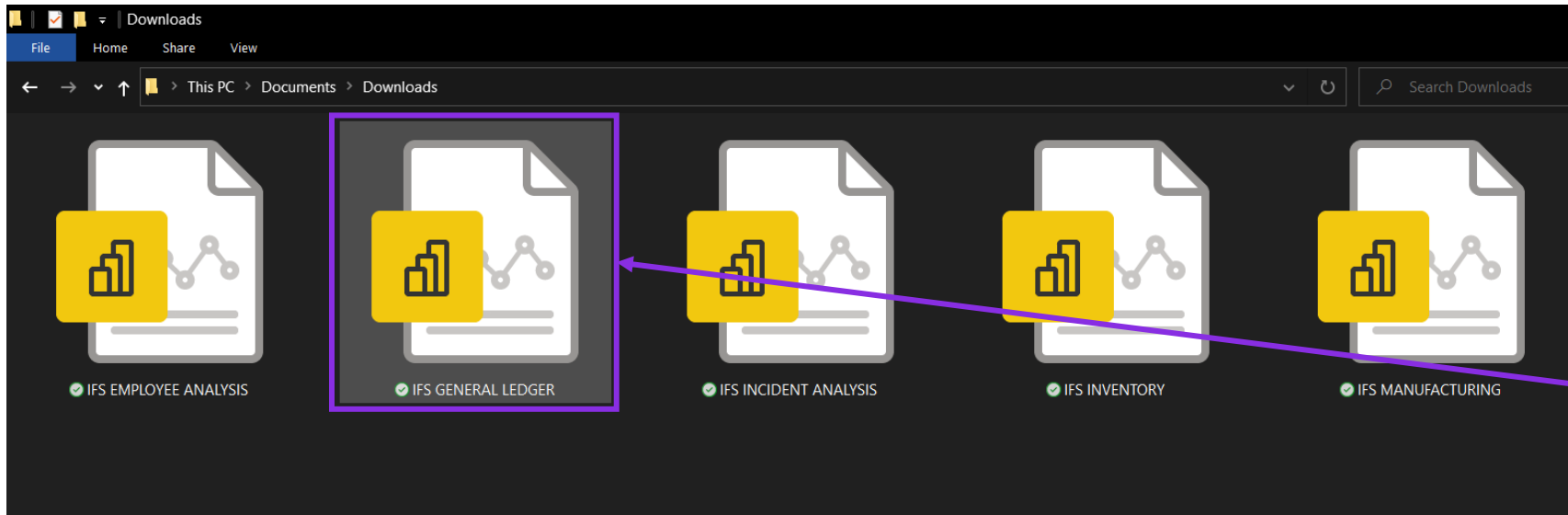
# Download Relevant PBI Report

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



# Open Power BI Report

Navigate to the downloaded location and open the Power BI Report



Open relevant file

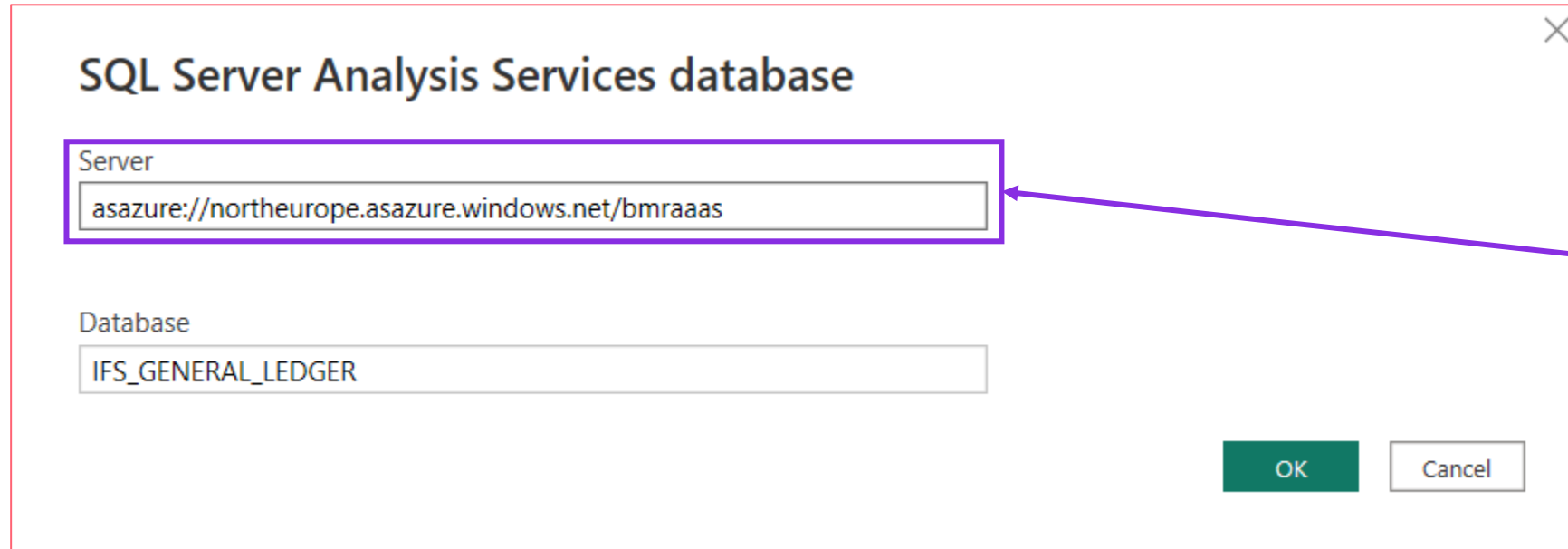


# Step-by-step guide

## 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

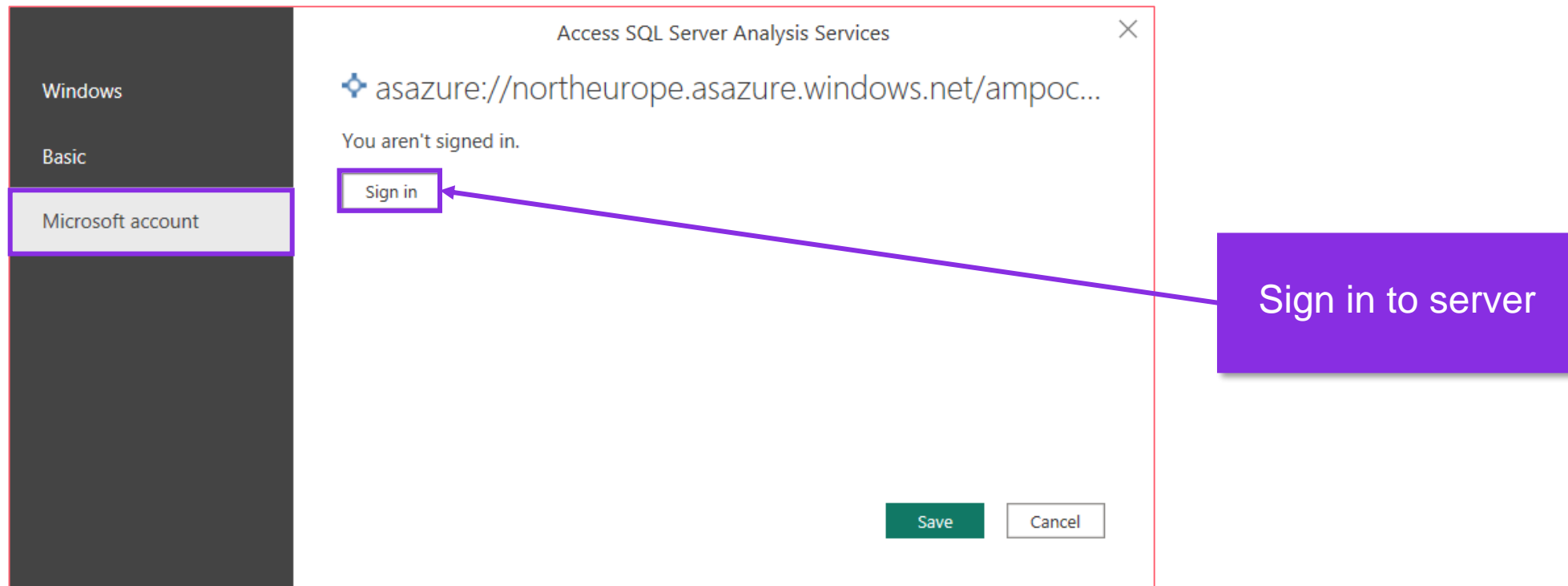
Database  
IFS\_GENERAL\_LEDGER

OK Cancel

Enter server location

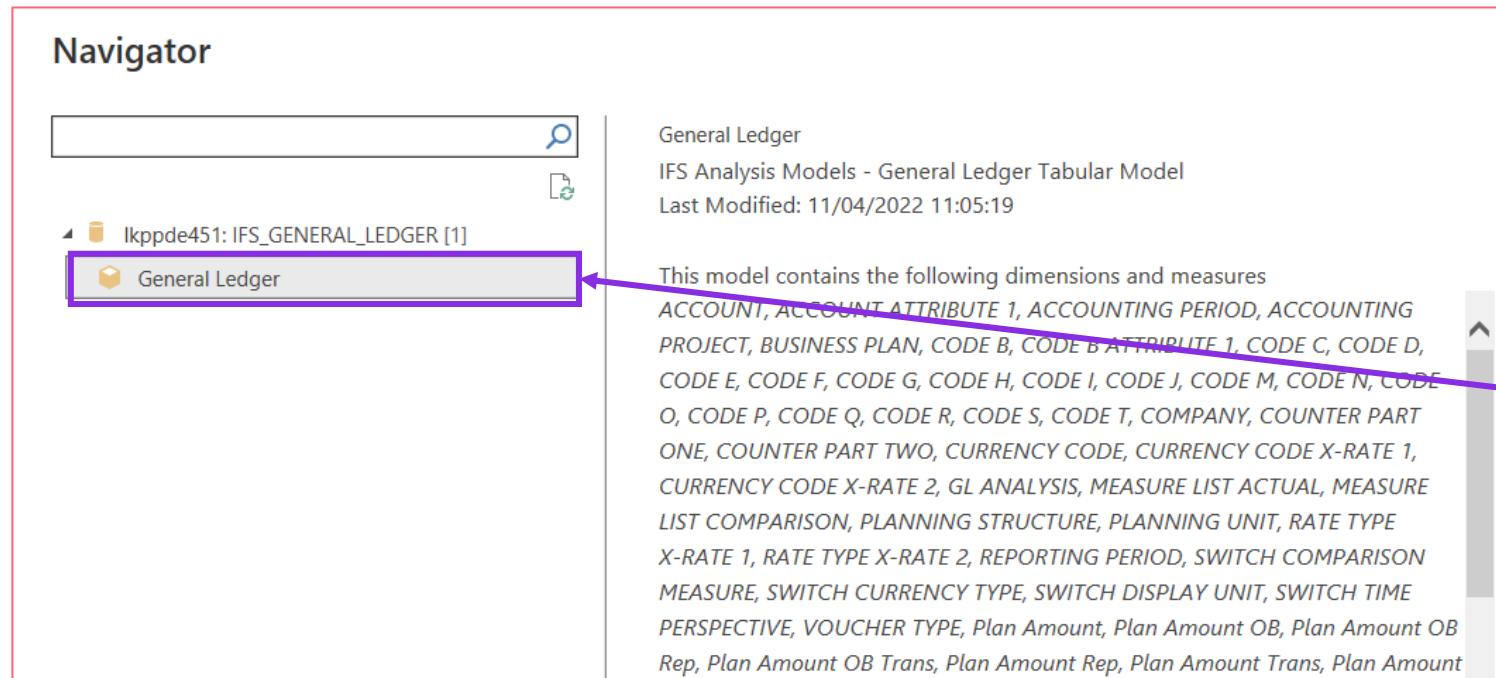
# Provide Login Credentials

- 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



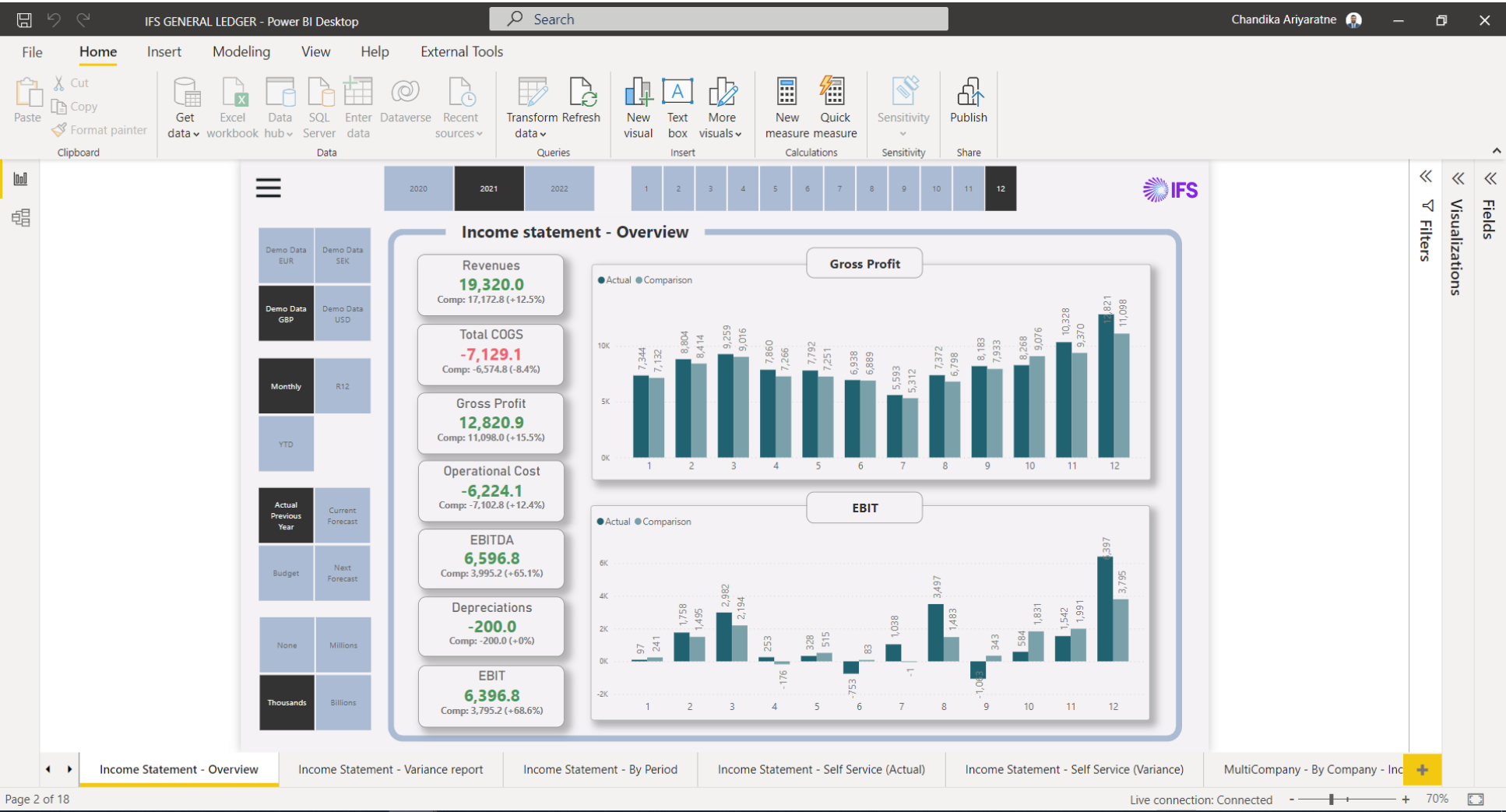
# Select from Navigator

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



Select the model and click “OK”

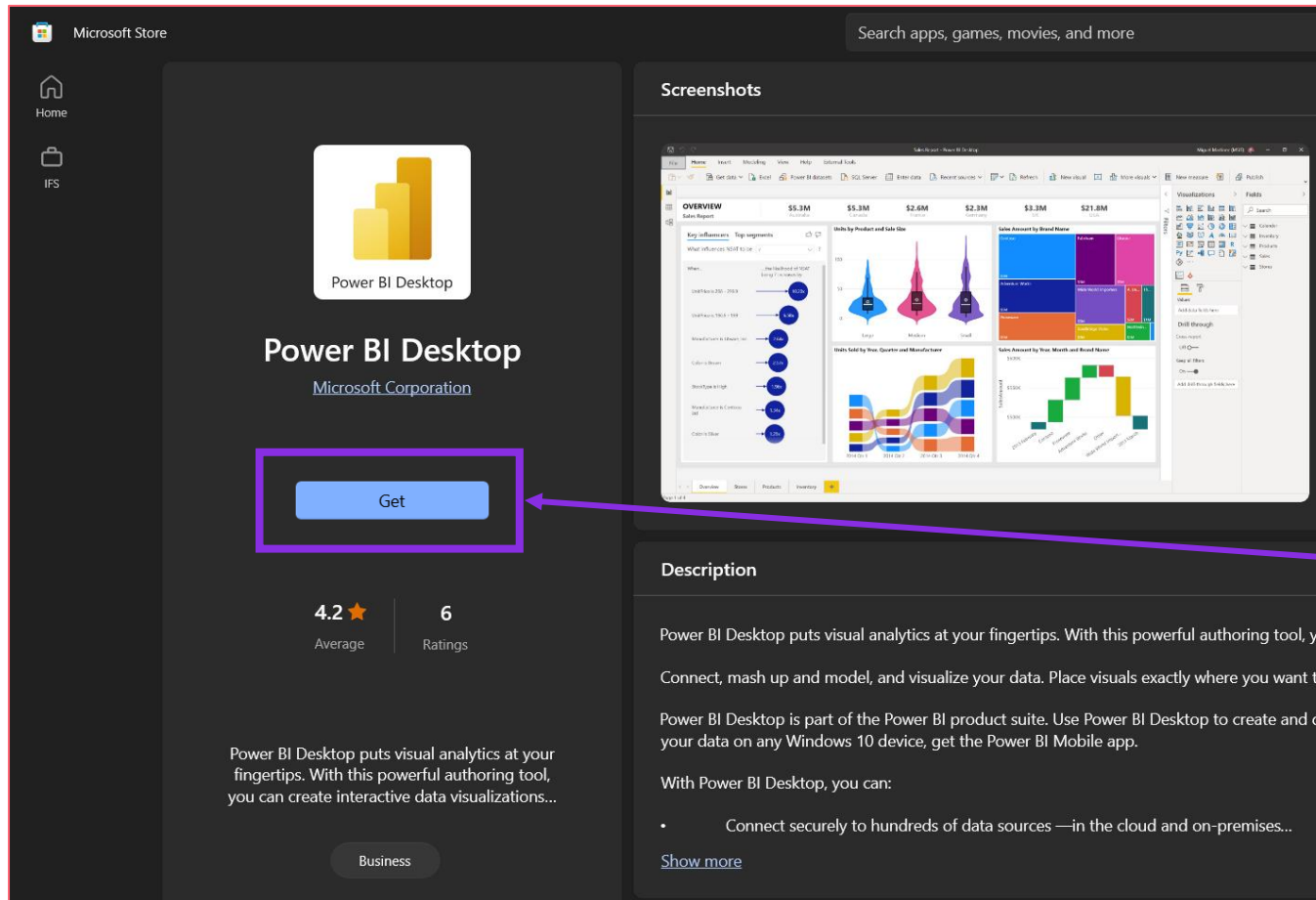
# Model Load



# Miscellaneous

# Install Power BI Desktop (Free)

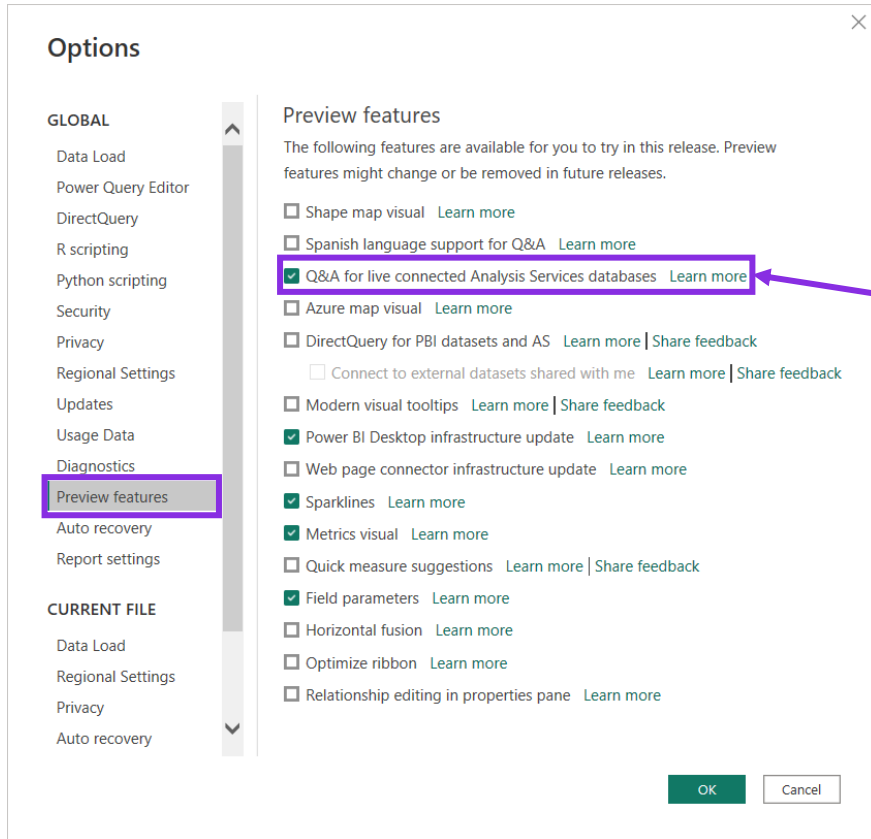
Follow the link <https://aka.ms/pbidesktopstore> which will take you to the Microsoft Store.



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

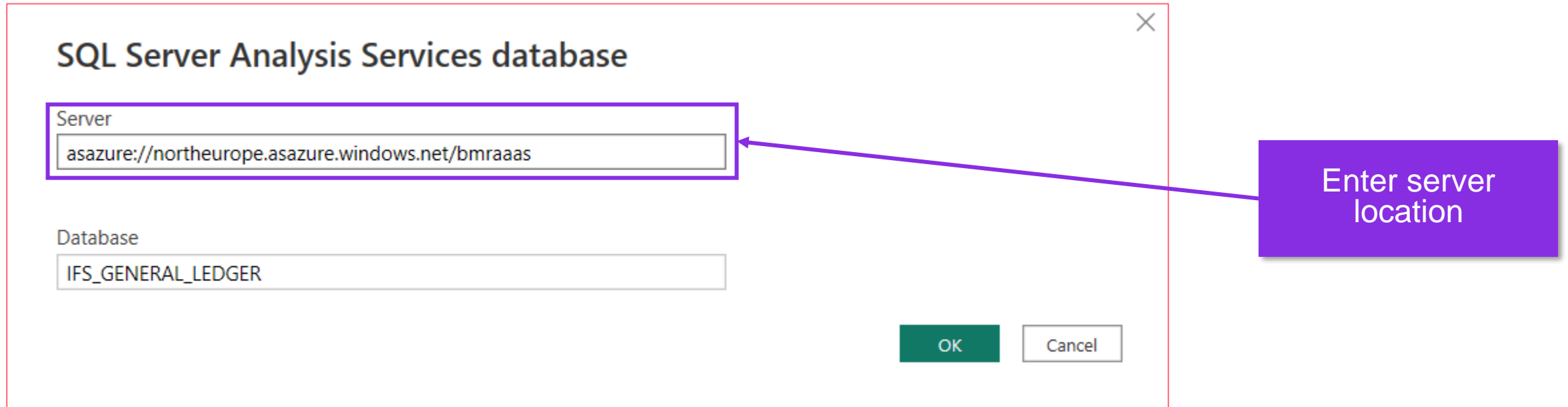


Select the option  
and click on "OK"



# 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