Quick Start Guide

Analysis Models - Power Bl

IFS



Contents

Pre-requisites

1

2 Step-by-step guide

Pre-Requisites



Pre-Requisites

- Environment setup completed for Analysis Models Power Bl
- 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 <u>https://docs.ifs.com/</u> 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



Download Relevant IFS Core model/ PBI Report

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



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



Publish .PBIX into the Golden Workspace

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

Publish to Power BI × Build ··· > Data	hal tools	New visual calculation	Image: Weight of the source measure measure sensitivity Image: Weight of the source measure sensitivity Sensitivity Sensitivity	Select Publish option
Select a destination Search AM CRM AM ESG AM Finance AM HCM AM IFS Cloud 22R2 AM IFS Cloud 23R1 AM ORM Select Cancel Select Cancel	Publish to Power BI Select a destination Select a destination Select AM CRM AM CRM AM ESG AM Finance AM HCM AM IFS Cloud 22R2 AM IFS Cloud 23R1 AM DEV CRM	Cancel	Build \gg Data Suggestions Q. s \square	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

MIFS Docu	mentation
Documentation Documentation	
Documents	*
Policies	>
Guides	>
Business Reporting & Analytics	~
Content for Analysis N Tabular	Iodels
Content for Analysis N	Iodels
Power Bl	
Sustainability Applicatio	ns >
IFS Cloud for Aviation Maintenance	>
FSM	>
PSO	>
Customer Engagement	>
Lifecycle Experience	>

Download Relevant Data Source Definition

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



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





Step-by-step guide Import Data Sources

Sign into IFS Cloud



Navigate to Parquet Data Sources Page

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

Find page Q	Solution Manager > Reporting and Analysis > Data Services > Data Source Management > Data Sources 📿									
 / Reporting and Analysis / Data Services 	Parquet Data Source									
Data Sources	् Search									
Data Sources	Add New Data Source Import									
Data Source Detail	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_NATERIAL_REAS	DIM_RETURN_MATERIA	Information Source	Dimension	Shared	120	270 hours ago	Success	No	Full
	i 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





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	Switch toggle based on the requirement
Use Imported Parquet Data Source Entries To Overwrite/Rename Existing Entries	Select Import button
> Sources Manager > Reporting and Analysis > Gairs Severes Management > Gairs Sources > Request Clairs Sources mport Parquet Data Source	
Data source Import Details Cocce The june Fiel To Be Upoarded CataSourceExport_General_Ledger json Uto Import Data Source Entries To Overwriter/Rename Existing Entries Confirmation to Import Are you sure you meed to import the Parquet data source entries Without overwriter/rename existing entries? 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

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

