

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
ex. johnsmith

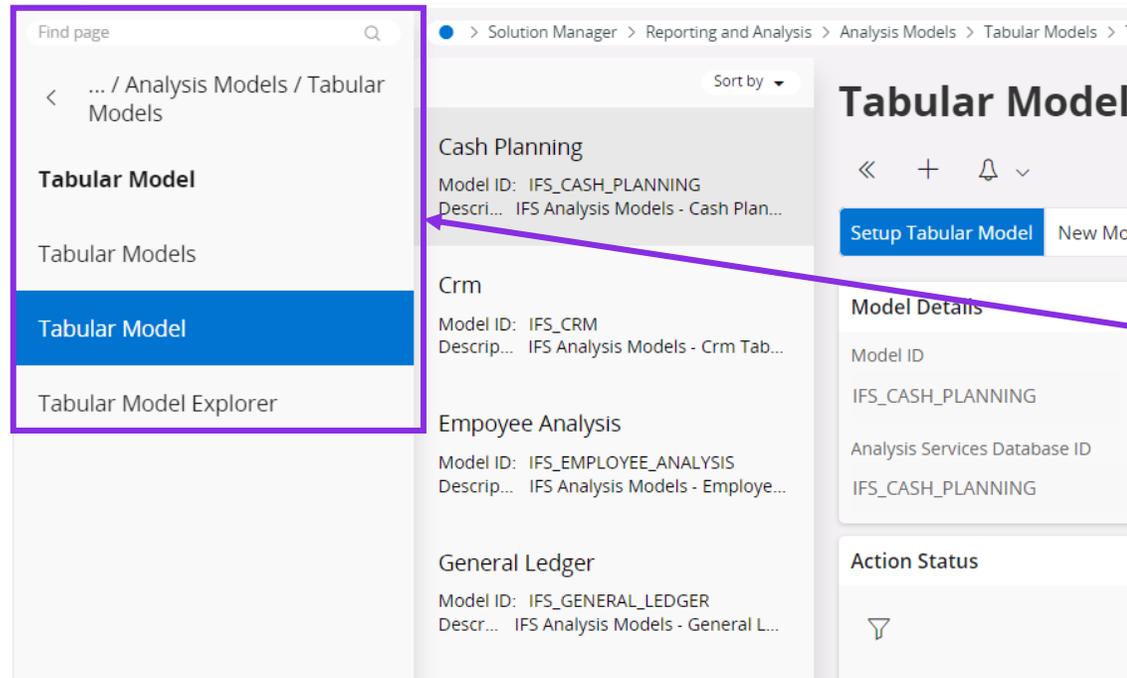
Password
.....

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 shows the IFS Solution Manager interface for selecting a Tabular Model. The breadcrumb path is: Solution Manager > Reporting and Analysis > Analysis Models > Tabular Models. The left sidebar shows a navigation menu with 'Tabular Model' selected. The main content area displays a list of models:

- 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 - Employe...
- General Ledger
Model ID: IFS_GENERAL_LEDGER
Descr... IFS Analysis Models - General L...
- Group Consolidation
Model ID: IFS_GROUP_CONSOLIDATION
Desc... IFS Analysis Models - Group Con...

The 'Employee Analysis' model is highlighted with a purple box. A purple arrow points from a callout box labeled 'Select Model' to the 'Employee Analysis' model. The right sidebar shows the 'Tabular Model' details for the selected model, including a 'Setup Tabular Model' button, 'Model Details' (IFS_GENERAL_LEDGER), and 'Action Status' (Model Action, Create Access).

Setup Tabular Model

The screenshot shows the IFS software interface for setting up a tabular model. The breadcrumb trail is: Solution Manager > Reporting and Analysis > Analysis Models > Tabular Models > Tabular Model. The main title is 'Tabular Model' with the subtitle 'General Ledger - IFS_GENERAL_LEDGER - IFS Analysis'. Below the title are navigation icons (back, home, notifications, dropdown) and three buttons: 'Setup Tabular Model' (highlighted with a red box), 'New Model Process Definition', 'Create Configuration', and 'Exclude'. The 'Setup Tabular Model' button has a red arrow pointing to a red callout box on the right that says 'Click to initiate setup'. Below the buttons is a 'Model Details' table with columns 'Model ID' and 'Name'. The table contains two rows: 'IFS_GENERAL_LEDGER' with 'General Ledger' and 'IFS_GENERAL_LEDGER' with 'IFS_GENERAL_LEDGER'. Below the table is an 'Action Status' section with a funnel icon.

Model ID	Name
IFS_GENERAL_LEDGER	General Ledger
IFS_GENERAL_LEDGER	IFS_GENERAL_LEDGER

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

Setup Tabular Model Assistant

Introduction Generate Access Views Deploy Tables and Views Deploy Tabular Model Data Load Definition Options Start Run of Data Load Definition Summary

This assistant will guide you to setup the tabular model **IFS_GENERAL_LEDGER**

◀ Previous ▶ Next Finish Do not Proceed Further

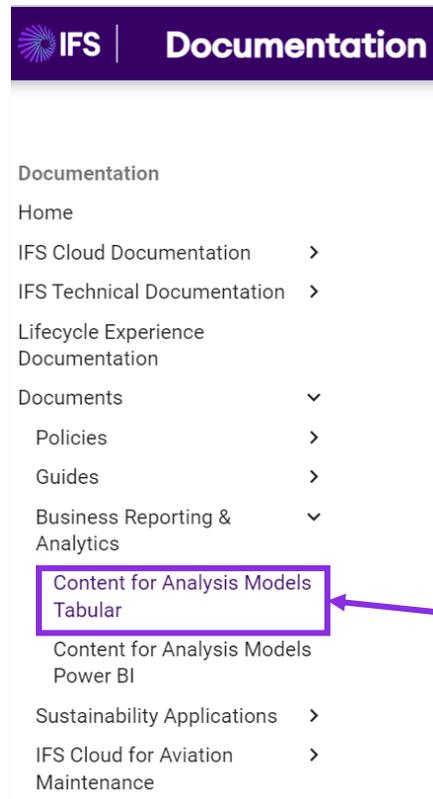
Follow Instructions on Wizard

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

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

Financials

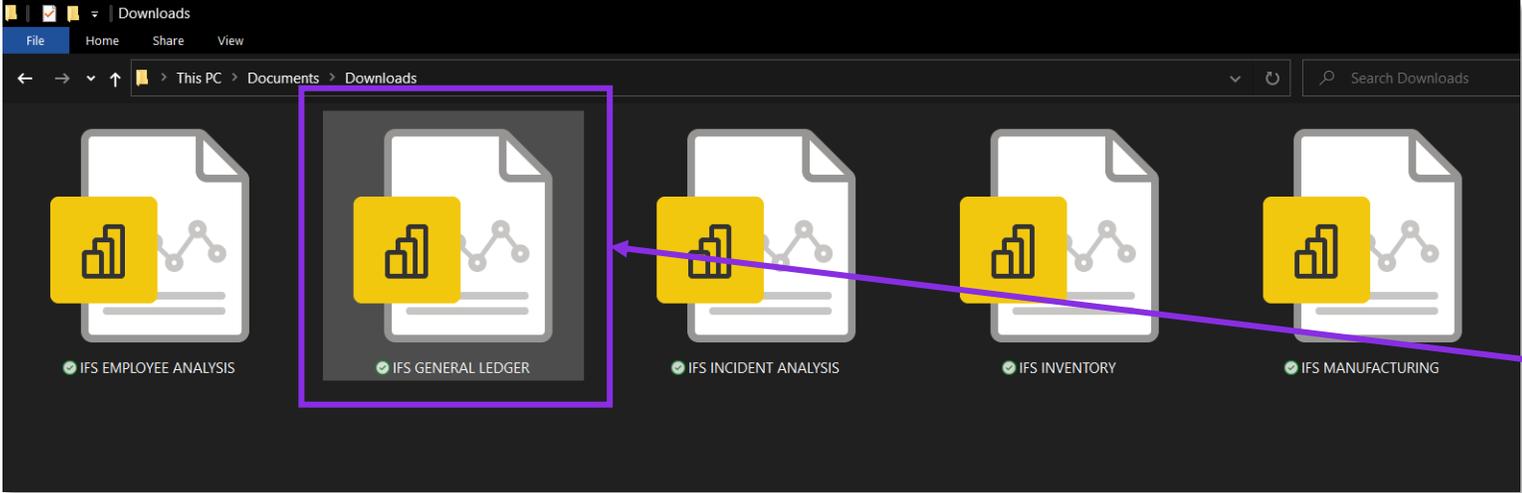
Model	21R2	22R1	22R2	23R1	23R2	24R1
Cash Planning	Not Applicable	Not Applicable	CP 22R2	CP 23R1	CP 23R2	Last modified 23R2
General Ledger	GL 21R2	Last modified: 21R2	GL 22R2	GL 23R1	GL 23R2	Last modified 23R2

Functional Area

IFS Cloud Version

Open Power BI Report

Navigate to the downloaded location and open the Power BI Report



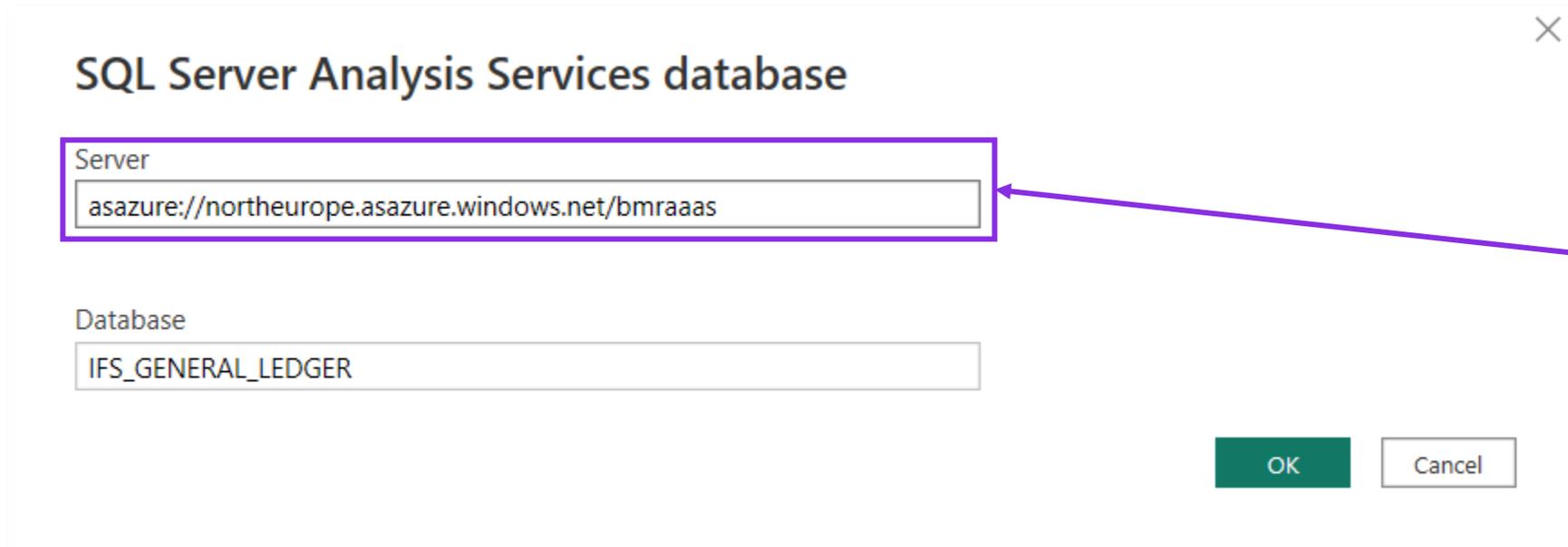
Open relevant file

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

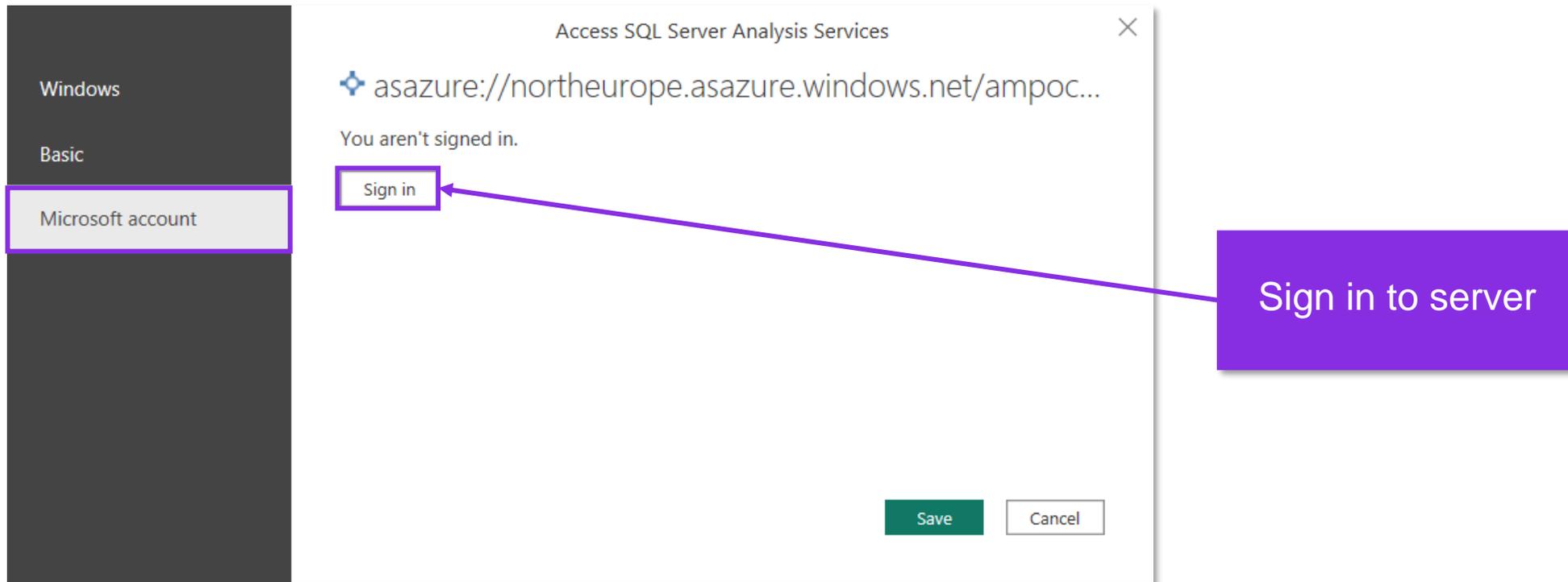
Database
IFS_GENERAL_LEDGER

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



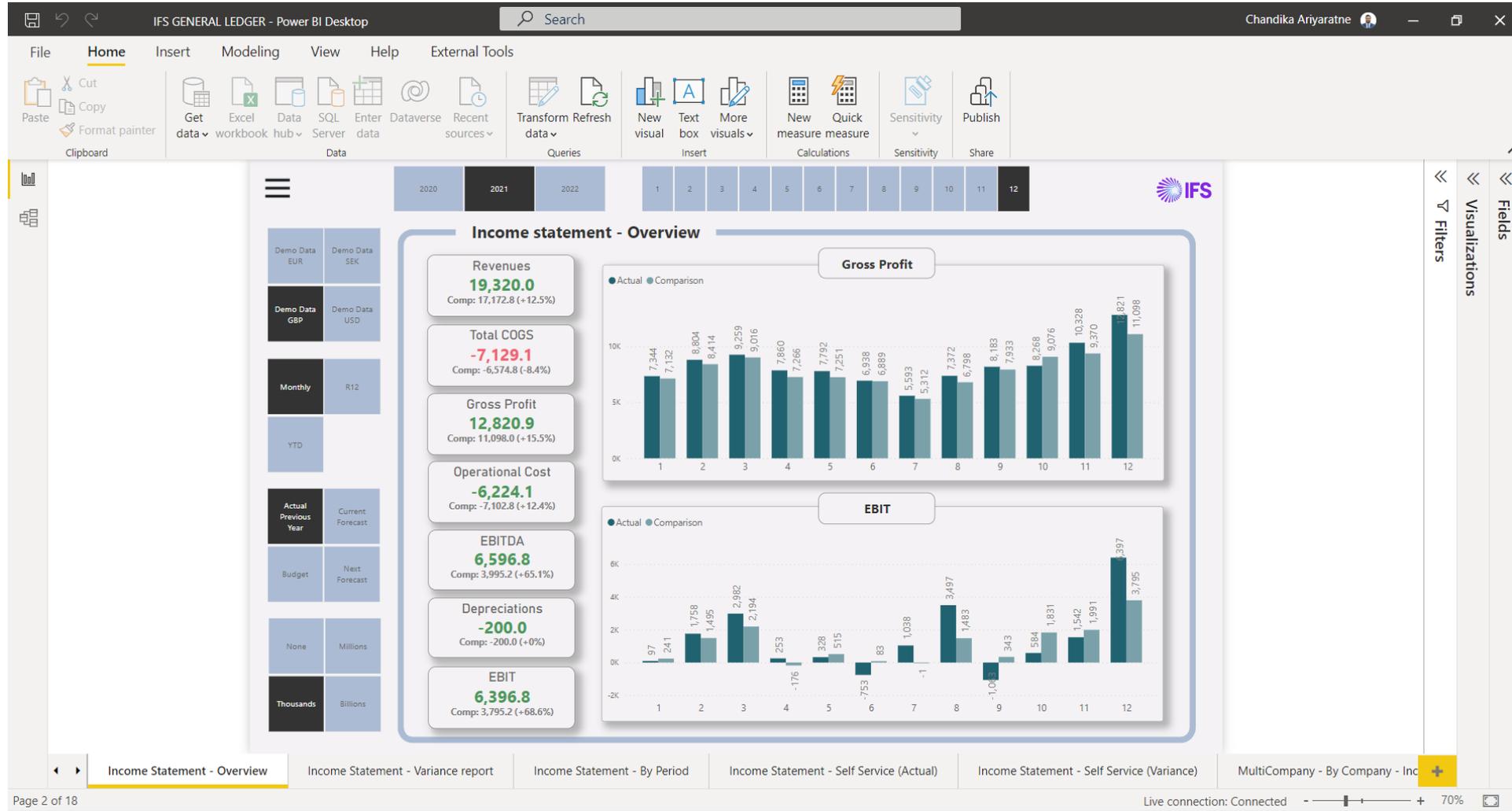
Select from Navigator

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

The Navigator window is titled "Navigator" and features a search bar at the top left. Below the search bar is a tree view showing a folder named "Ikppde451: IFS_GENERAL_LEDGER [1]" which contains a sub-item "General Ledger". This "General Ledger" item is highlighted with a blue border. To the right of the tree view, the selected model's details are displayed: "General Ledger", "IFS Analysis Models - General Ledger Tabular Model", and "Last Modified: 11/04/2022 11:05:19". Below this, a list of dimensions and measures is shown, including ACCOUNT, ACCOUNT ATTRIBUTE 1, ACCOUNTING PERIOD, ACCOUNTING PROJECT, BUSINESS PLAN, CODE B, CODE B ATTRIBUTE 1, CODE C, CODE D, CODE E, CODE F, CODE G, CODE H, CODE I, CODE J, CODE M, CODE N, CODE O, CODE P, CODE Q, CODE R, CODE S, CODE T, COMPANY, COUNTER PART ONE, COUNTER PART TWO, CURRENCY CODE, CURRENCY CODE X-RATE 1, CURRENCY CODE X-RATE 2, GL ANALYSIS, MEASURE LIST ACTUAL, MEASURE LIST COMPARISON, PLANNING STRUCTURE, PLANNING UNIT, RATE TYPE X-RATE 1, RATE TYPE X-RATE 2, REPORTING PERIOD, SWITCH COMPARISON MEASURE, SWITCH CURRENCY TYPE, SWITCH DISPLAY UNIT, SWITCH TIME PERSPECTIVE, VOUCHER TYPE, Plan Amount, Plan Amount OB, Plan Amount OB Rep, Plan Amount OB Trans, Plan Amount Rep, Plan Amount Trans, Plan Amount.

Select the model and click "OK"

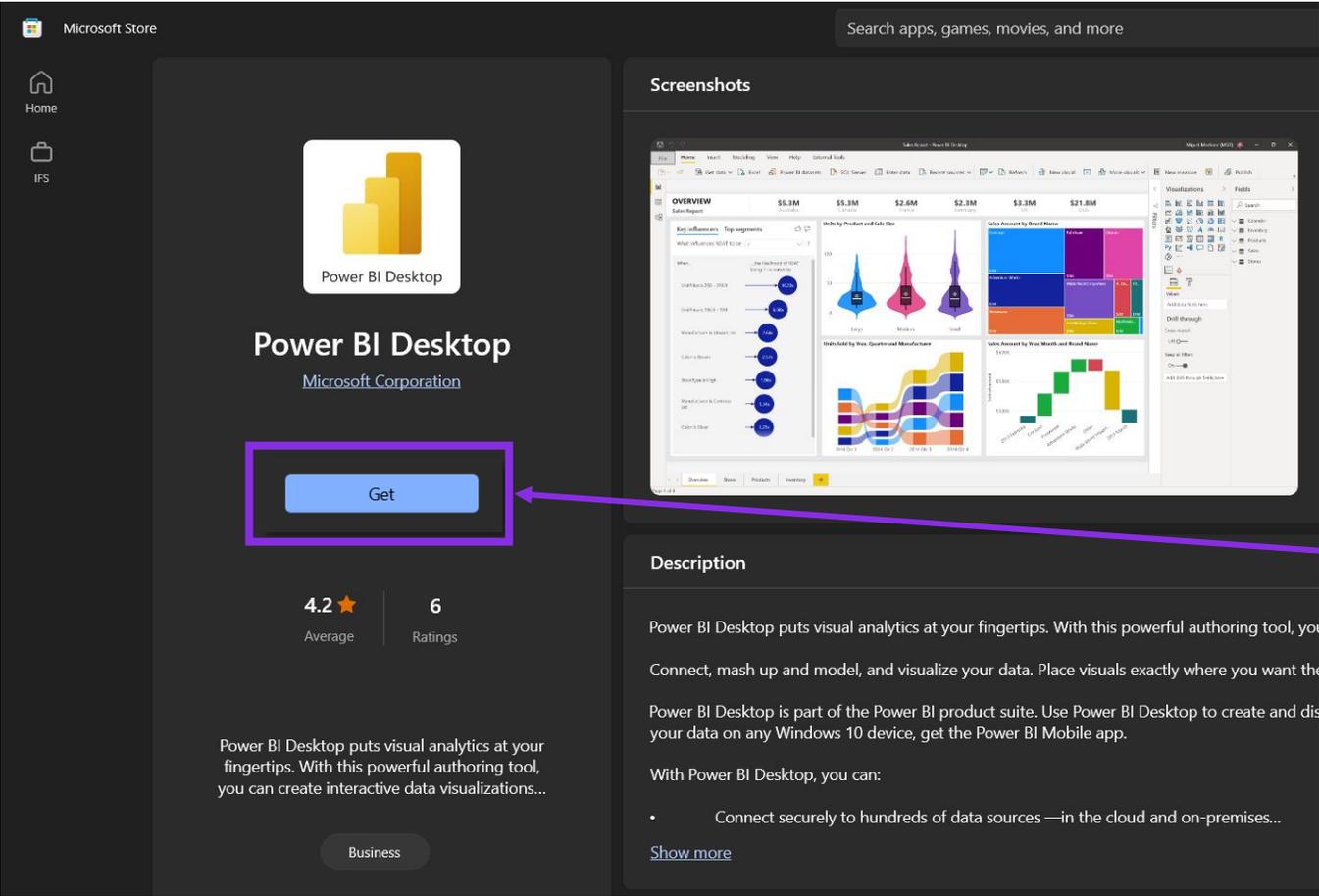
Model Load



Miscellaneous

Install Power BI Desktop (Free)

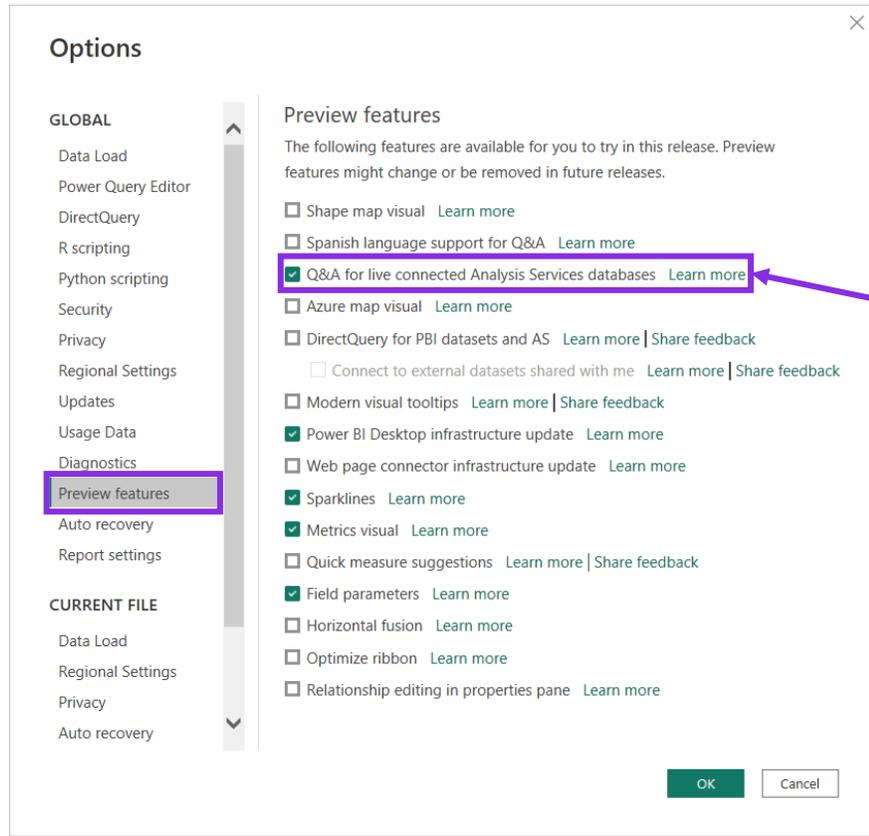
Follow the link <https://aka.ms/pbidesktopstore> which will take you to the Microsoft Store.



Click on "Get" to download

Enable Q&A in Power BI Desktop

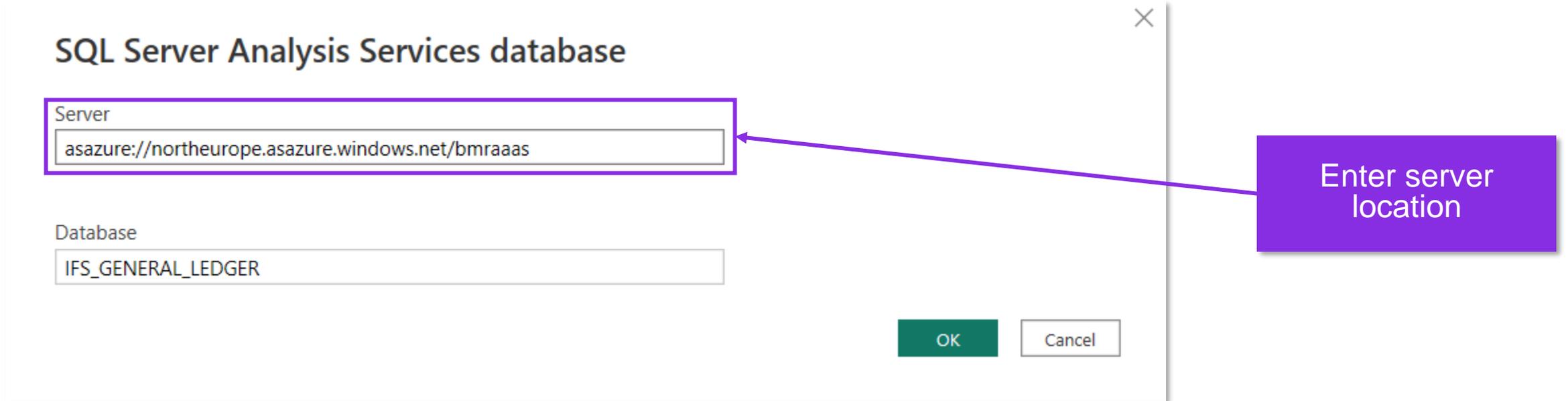
- Once Power BI is opened follow these steps.
 - File>Options and settings>Options



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