



CCH iFirm Analytics: Setup Guide

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Note:

A subscription to *CCH iFirm Analytics* is required to access **Power BI** and to use the **CCH iFirm Analytics** template.

Add the Power BI security role

In *CCH iFirm*, the **Power BI** security role should be added to any user who will be accessing a **Power BI** report. Keep in mind that the data in the **OData** feed does not restrict the information displayed in *CCH iFirm*. It will show all the information available in the feed regardless of the user's security roles that are assigned in *CCH iFirm*.

1. Go to **Settings > Users > Manage Profiles**.
2. Select the security profile to which you want to add the role to.
3. Select **Power BI** in the left-hand menu and click the **Add** button.
4. Click the **Save** button. All users who have this security profile will have access to **Power BI** the next time they log in.

To add a single user:

1. Go to **Settings > Users > User Profile**.
2. Select the user profile to which you want to add the role to.
3. Click the **Security** tab.
4. Expand the **User-specific Security** section.
5. Select **Power BI** in the left-hand menu and click the **Add** button.
6. Click the **Save** button. All users who have this security profile will have access to **Power BI** the next time they log in.

Add the Power BI license

1. Go to **Settings > Users > User Profile**.
2. Click the **Licenses** tab.
3. Ensure that the **Power BI** license is moved into the **Associated licenses** section.
4. Click the **Save** button.
5. You will need to log out and log back in to see the **Power BI** module in the left-hand menu.

Download the desktop version of Power BI

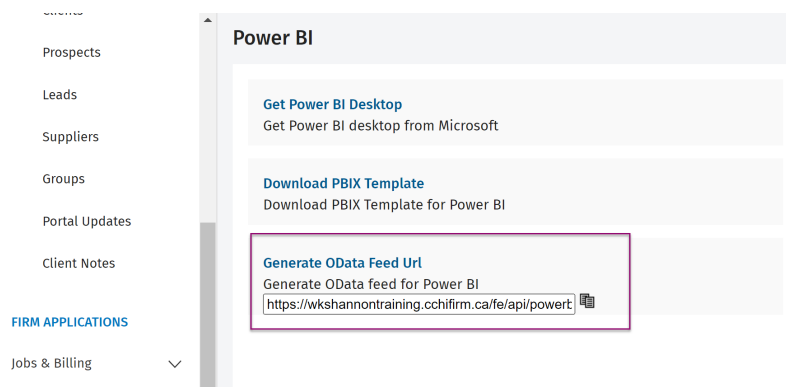
To open an **OData** feed URL or a PBIX template, download the desktop version of **Power BI** to your computer. To download the desktop version, proceed as follows:

1. Click **Power BI** in the left-hand menu. The **Power BI** page displays.
2. Click **Get Power BI Desktop**.
3. Follow the instructions to complete the installation. For additional information, you can also consult the Microsoft page [Get Power BI Desktop](#).

Generate an OData feed

To generate an **OData** feed, proceed as follows:

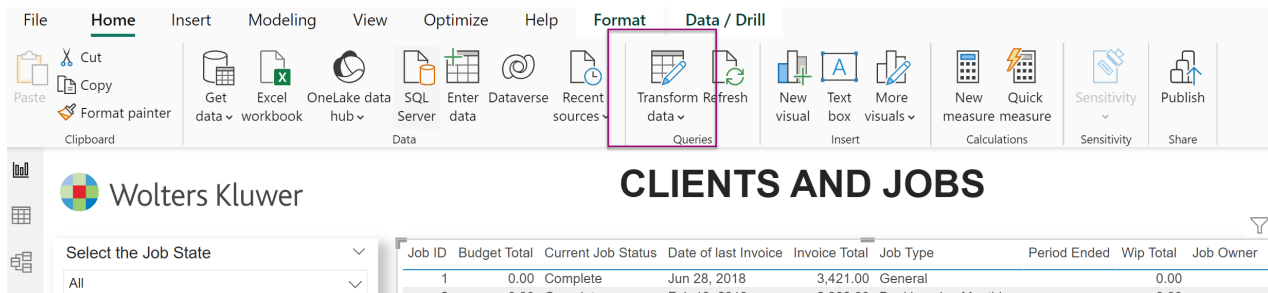
1. Click **Power BI** in the left-hand menu. The **Power BI** page displays.
2. Click **Generate OData Feed Url**.



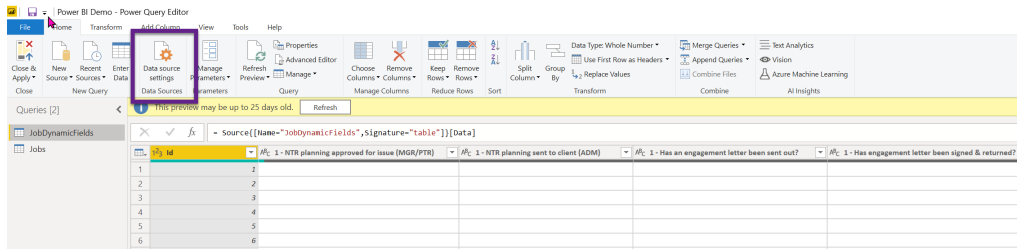
3. Copy the **OData** URL. The URL can be copied by clicking the page icon next to the field.

Publish and update the Analytics file

1. If an existing report for *CCH iFirm Analytics* is saved on your hard drive, please delete that report. It will be named **iFirm Reports for Analytics version 1**.
2. Download the report from *CCH iFirm*.
3. Click **Power BI** in the left-hand menu. The **Power BI** page displays.
4. Click **Download Power BI Analytics Template**.
5. Open the report from the desktop version of **Power BI**.
6. Click the **Transform data** button.



7. Select **Data source settings**.



8. Click the **Change Source** button.


Data source settings

Manage settings for data sources that you have connected to using Power BI Desktop.

Data sources in current file Global permissions

Search data source settings



 <https://wkshannontraining.cchifirm.ca/fe/api/powerbi/1.0>

Change Source...

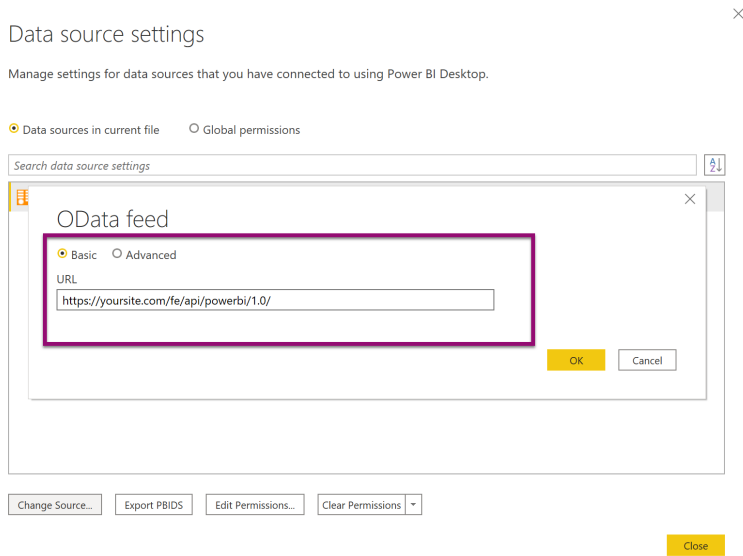
Export PBIDS

Edit Permissions...

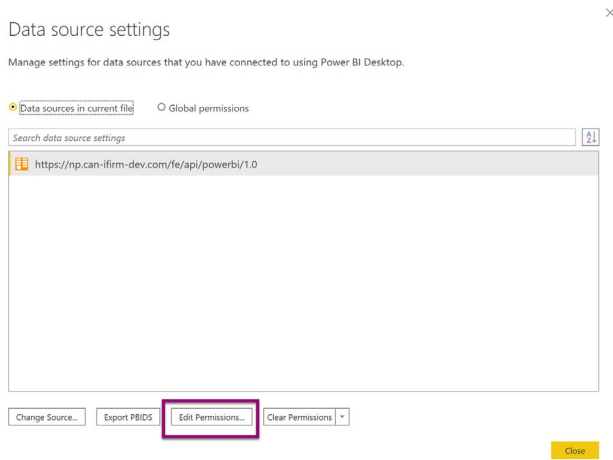
Clear Permissions ▾

Close

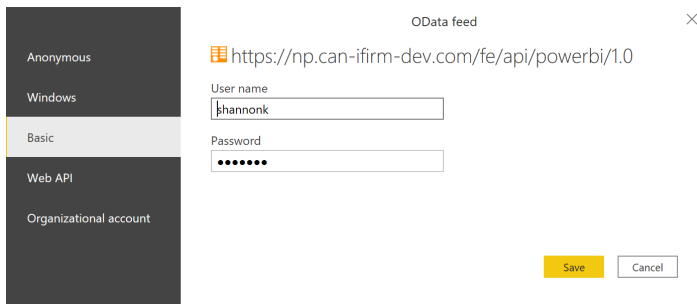
9. Make sure the feed is set to **Basic**. Paste your **OData** feed URL and click **OK**.



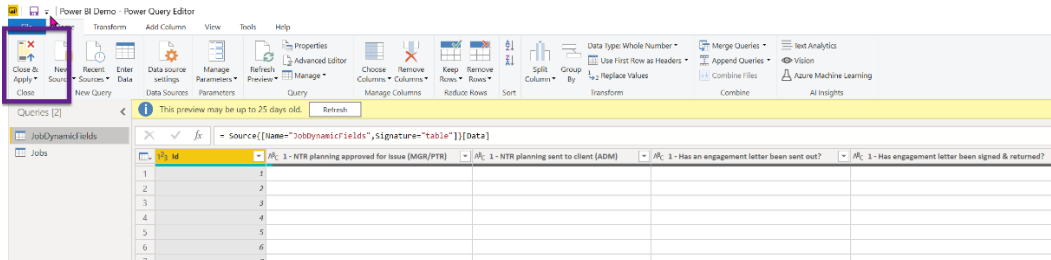
10. Click the **Edit Permissions** button.



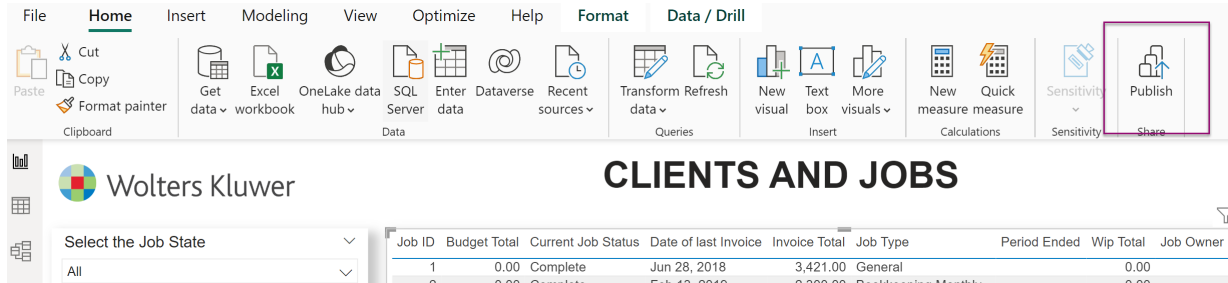
11. Enter your **CCH iFirm** username and password and click the **Save** button.



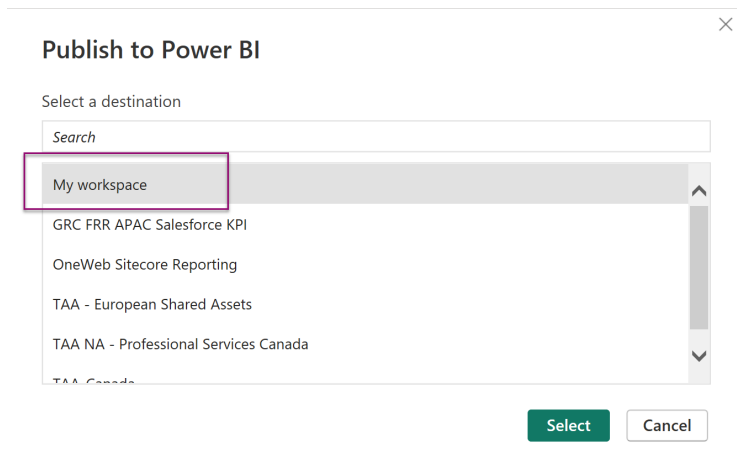
12. Click **Close**, then **Close and Apply**.



13. The feed will now try to update itself with your site's information and populate the fields in your report.
14. Save the report after the refresh has been completed.
15. Click the **Publish** button.



16. Select **My workspace** and click the **Select** button.



17. A pop-up window will appear, asking if you would like to replace the dataset. Click the **Replace** button.

Replace this dataset?

You already have a dataset named 'iFirm Reports for Analytics version 1' in Power BI.

Replacing this dataset may impact:

1 report

View the impact of this change on the content in the Power BI service.

[View impact](#)

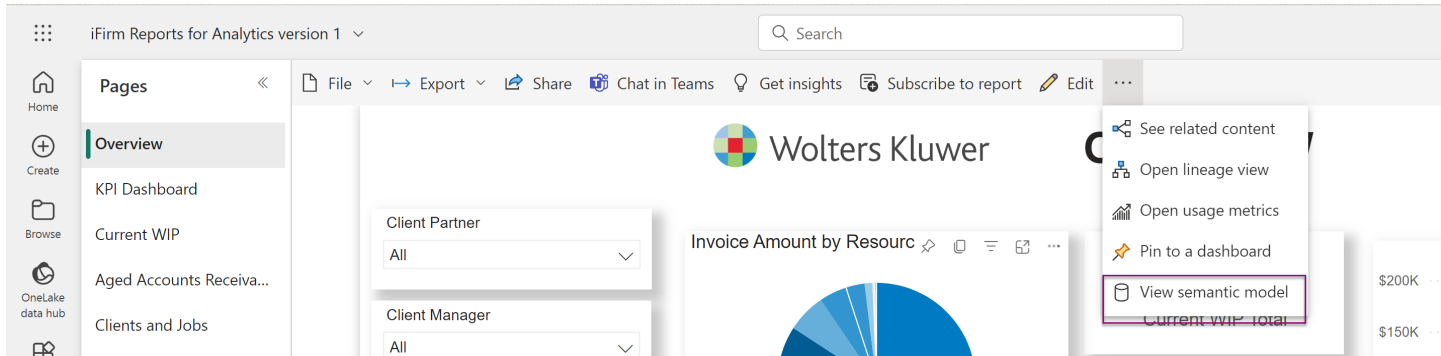
Replace

Cancel

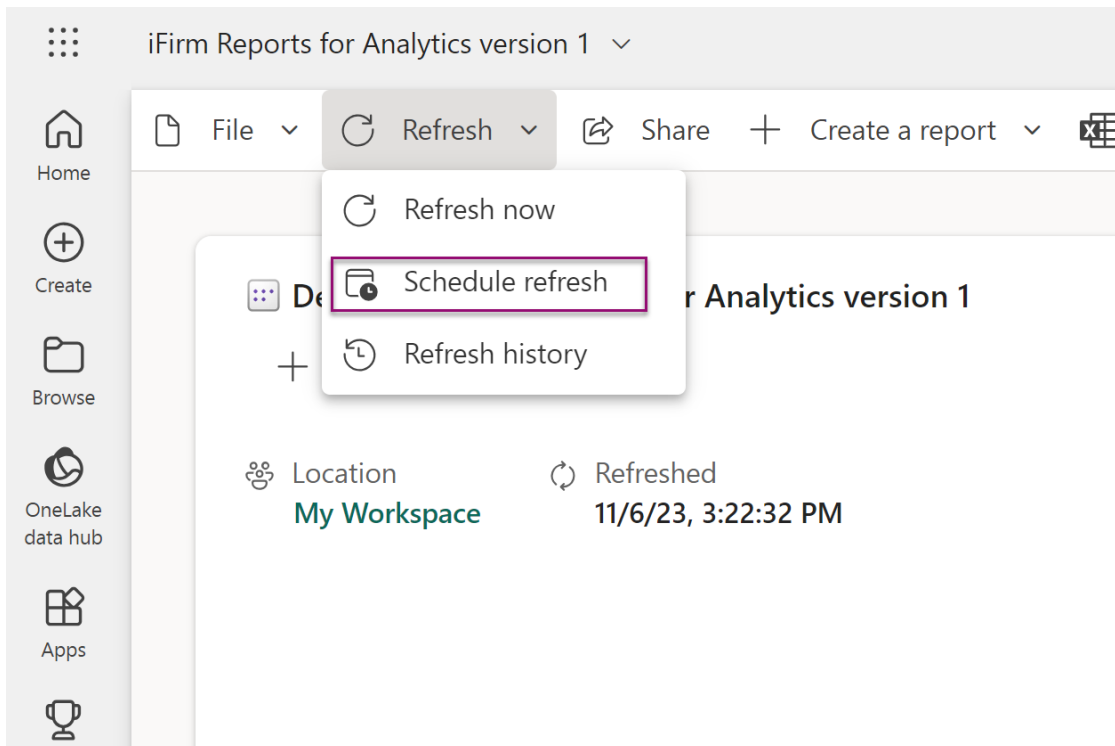
18. The report will now be updated in the cloud version. Open the cloud version of the report.

19. In the **Power BI** report, click the three-dot icon.

20. Select **View semantic model**.



21. Click the **Refresh** button, then select **Schedule refresh**.

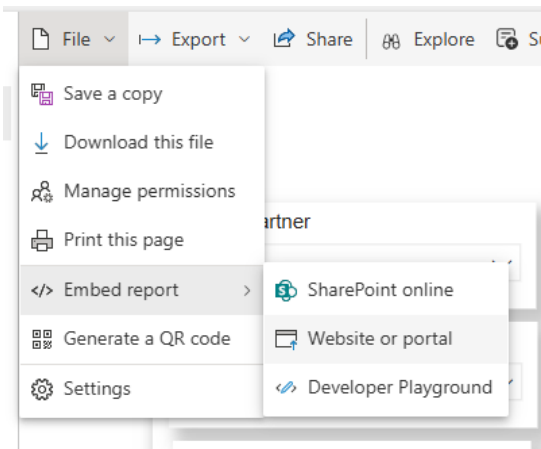


22. Expand the **Data source credentials** section and select **Edit credentials**.

23. Enter your **CCH iFirm** login information and select the **Sign-in** option. When we publish data from the desktop version to the cloud, it doesn't sign you into the feed. This allows data refreshes within the cloud version.

Add your URL to CCH iFirm

1. Open the cloud version of the report.
2. In the **Power BI** report, select **File > Embed report > Website or portal**.



3. Copy the first URL into *CCH iFirm*.

Securely embed this report in a website or portal ✕

Here's a link you can use to embed this content.

<https://app.powerbi.com/reportEmbed?reportId=95d70cb8-66df-4507-881f-f271555a08cc&>

HTML you can paste into a website

`<iframe title="iFirm Reports for Analytics version 1a" width="1140" height="541.25" src="h`

[Explore more embedding options in our Power BI embedded analytics playground](#) Close

4. Click **Power BI** in the left-hand menu. The **Power BI** page displays
5. In the **Enter Power BI Analytics Url** field, paste the URL from the cloud version of **Power BI**.

Power BI

[Get Power BI Desktop:](#)
Get Power BI desktop from Microsoft

[Download Power BI Analytics Template:](#)
Download Analytics Template for Power BI

[Download PBIX Template:](#)
Download PBIX Template for Power BI

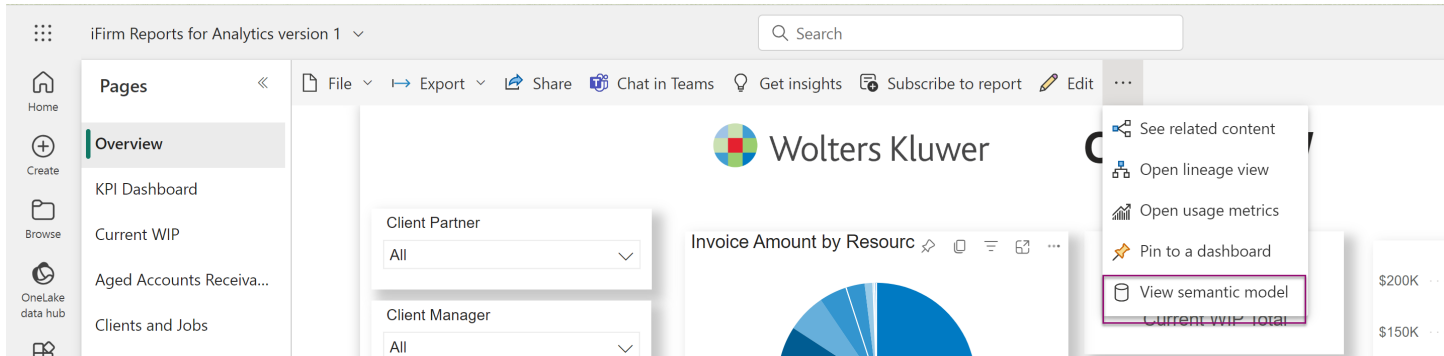
[Generate OData Feed Url:](#)
Generate OData feed for Power BI

[Enter Power BI Analytics Url:](#)
Enter Analytics Url for Power BI
 ✓ ✕

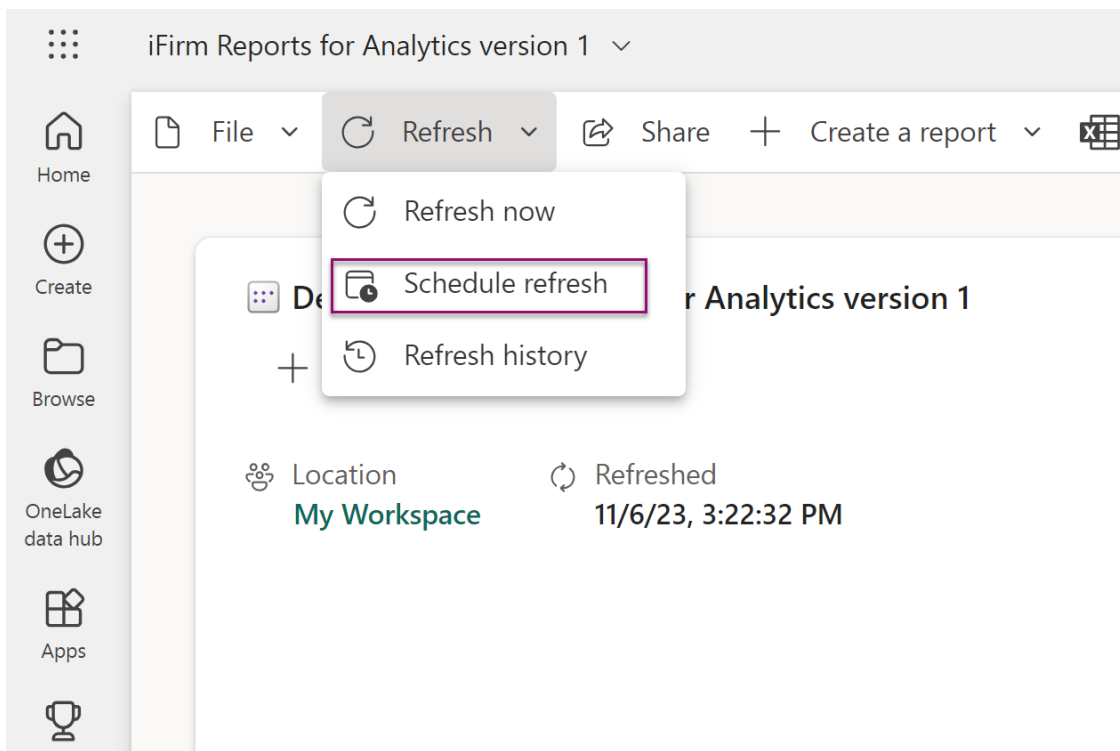
Refresh the data for Analytics in Power BI

1. Open the cloud version of the report.
2. In the **Power BI** report, click the three-dot icon.

3. Select **View semantic model**.

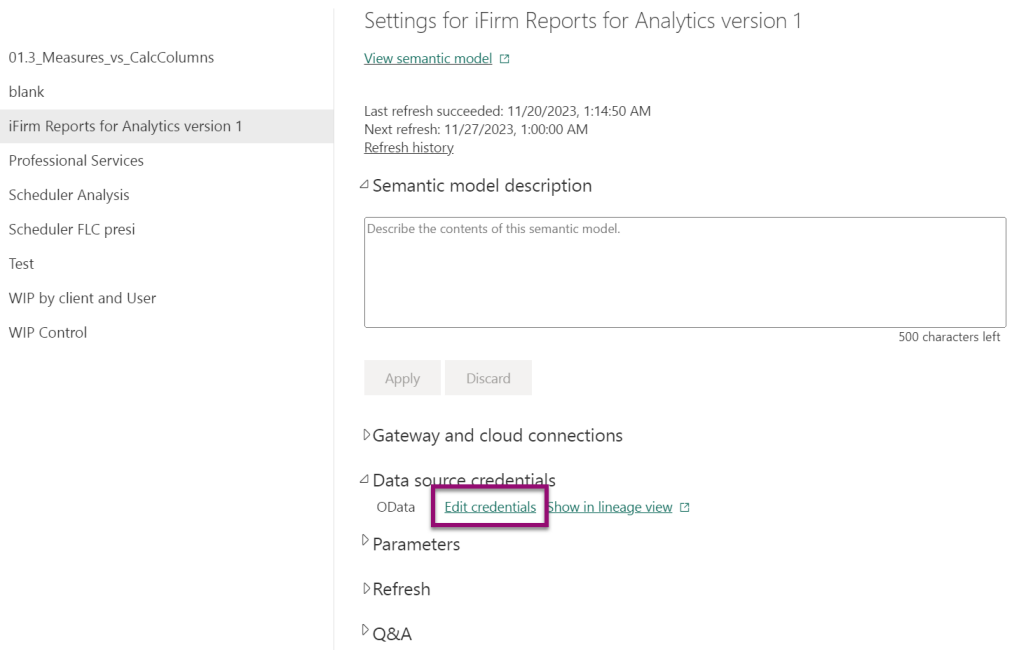


4. Click the **Refresh** button, then select **Schedule refresh**.



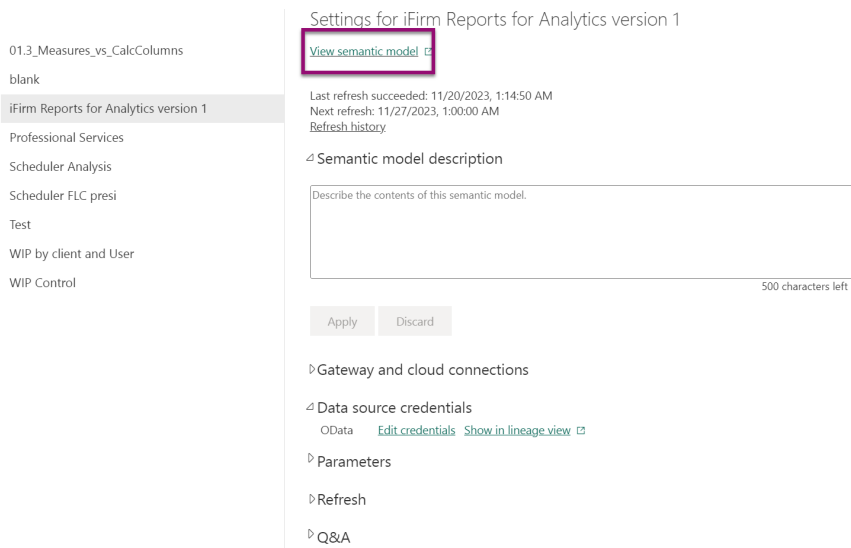
5. Expand the **Data source credentials** section and select **Edit credentials**.

6. Enter your *CCH iFirm* login information and select the **Sign-in** option. When we publish data from the desktop version to the cloud, it doesn't sign you into the feed. This allows data refreshes within the cloud version.



7. Select the **Refresh** section to expand the options and set up a scheduled refresh.
8. Turn the button on.
9. Select the refresh frequency, the time zone and the time to refresh.
10. Make sure the **Refresh failure** section is set to send the email to the semantic model owner. You may also enter additional users to receive notifications.
11. Click the **Apply** button.

To go back to the semantic model, click the link at the top of the page.



From the semantic model, you can also refresh the feed manually by clicking the **Refresh** button, then **Refresh now**. Ensure that you enter the **Data source** credentials prior to using this option or an error will occur.

Share the report with colleagues

Note: In order to share the report, the user will need the security rights for **Power BI** and a Power BI license to view the report from the **Analytics menu** link in *CCH iFirm*.

1. In the cloud version of the **CCH iFirm Analytics** report, click the **Share** button.
2. Enter the name of the person in your organization that you want to share the report with.
3. You can select the box **Include my changes**. This will sync filter selections, visual customization and drill downs with the other user.
4. Click the **Send** button.