# BRIO 6.2 INSTALLATION NOTES FOR WINDOWS

## COMPASS DATA WAREHOUSE

**NOTE: These instructions are for COMPASS files only
They will only work with a COMPASS signon**

**Before you begin the installation of BRIO, you should close all other Windows applications**

**If this is a new install, start at STEP 1
If this is an upgrade, start at PRESTEP and stop after STEP 2**

## PRESTEP: REMOVE PREVIOUS BRIO VERSIONS
- Drag your Open Catalog Extensions folder and your *.bqy files to your Desktop
- Go to (Start, Settings, Control Panel, Add/Remove Programs) and choose BrioQuery Explorer and click on ADD/REMOVE and click on YES when it asks if you are sure
- When completed with STEP 2
  - Double click on MY COMPUTER
  - Double click on (C:) DRIVE
  - Double click on PROGRAM FILES
  - Double click on BRIO
  - Double click on BRIOQUERY
  - Double click on PROGRAM
- Drag the Open Catalog Extensions folder on your Desktop onto this one
- Place your *.bqy files you saved in any directory you want

## STEP 1: TEST TCP/IP
- To test your TCP/IP connection to the Data Warehouse server
- Go to Start, Programs, MS DOS PROMPT (in Microsoft Menu if you have Windows 98)
- Type PING 10.252.0.135 and press Enter
- If you see a message that the server has replied to your Ping (several lines that begin with REPLY) you have successfully reached the server. If so just type EXIT and continue with Step 2
- If you encounter an error (Request timed out, etc.) please check your systems TCP/IP settings (go to Control Panel, Network) and then try Pinging the server again

## STEP 2: INSTALL BRIO
- Double click on Network Neighborhood icon on your Desktop
- Double click on ETS01
- Double click on SBBC
- Double click on WINDOWS
- Double click on APPLICATION
- Double click on DATABASE
- Double click on BRIO INSTALL
- Double click on BRIO INSTALL 6.2
- Double click on SETUP.EXE
- The BRIO ENTERPRISE WELCOME will appear
- Click on Install Client Software

- At Validate Install Key prompt, type **1JMUN** (this is case sensitive)
- You may be prompted that you have to install Microsoft Data Access because it is missing. If you are prompted then just click YES and after it installs RESTART your computer
- Click on NEXT
- Click on YES to accept License Agreement
- At User Info screen enter
    - SBBC
    - SBBC
    - 318208409-300730377
- Click on NEXT
- Click on NEXT at Choose Destination Location screen **to accept the default folder for BRIO**
- Click on NEXT at Choose Components screen. **Click checkbox for Program Files. This should be the only box with a checkmark**
- Click on NEXT at Select Program Folder screen
- Click **Finish after** you get prompt that the install was successful
- After you are finished installing BrioQuery, close all open windows on your Desktop

## STEP 3: INSTALL CLIENT ACCESS
- Double click on Network Neighborhood icon on your Desktop
- Double click on ETS01
- Double click on SBBC
- Double click on WINDOWS
- Double click on APPLICATION
- Double click on DATABASE
- Double click on BRIO INSTALL
- Double click on CLIENT ACCESS WIN 95
- Double click on SETUP.EXE (it has an icon of a computer or a white box with a blue header)(if it says you have a newer version already on your PC, then proceed to STEP 4)
- Click on NEXT at Welcome screen
- Click on YES to accept License Agreement
- Click on CUSTOM when asked about type on installation
- Click on NEXT at Select Destination Directory screen
- REMOVE X (Deselect) from PRINTER DRIVERS, **Application Development** TOOLKIT, SNA COMMUNICATIONS **Support** and click on NEXT
- **Click NEXT to let setup modify the AUTOEXEC.BAT file**
- Click on NEXT when asked to create a program shortcut
- Click on NEXT at Start Copying Files screen (this takes several minutes so be patient)
- When it's done remove checkmark from VIEW README File
- Click on NEXT
- Click on FINISH to restart the computer
- If the system doesn't restart after several minutes turn it off and then back on
- If it goes into SAFE MODE just click START and choose RESTART THE COMPUTER
- After the system restarts remove checkmark to bypass "Preview the program" and "Show this when I restart my computer". Click on NEXT. In other words we don't want to preview and we don't' want to see this screen anymore

## STEP 4: AS/400 INSTALLATION
- After restart click on START and go to PROGRAMS and choose **IBM AS400** CLIENT ACCESS or you can double click on shortcut that was created on your Desktop
- Click on AS/400 CONNECTIONS

- ➢ Click on NEXT
- ➢ At TCP/IP choose NEXT
- ➢ When prompted for **AS400 SYSTEM** type AS9625C and click on NEXT
- ➢ Verify IP Address (10.252.0.135) and click on NEXT
- ➢ Enter your Brio Userid and click on NEXT
- ➢ At Managing System prompt make sure YES is checked and click on NEXT
- ➢ At "Add AS400 Connection" click on dropdown to choose CONNECT ONLY
- ➢ Click on NEXT
- ➢ Click on Verify Connection. If it says CONNECTION VERIFIED click on OK and then click on FINISH. If it does not verify you need to go back and check TCP/IP settings
- ➢ Click on X in right corner to close Connection window

## STEP 5: ODBC SETUP
- ➢ Start ODBC Data Source Administrator (Start, Settings, Control Panel, ODBC Data Sources)
- ➢ Check to see if you have DWCMPS listed as a User Data Source. If you HAVE it already click on CANCEL and proceed to STEP 6
- ➢ Click on ADD then FINISH
- ➢ At next screen fill in the following information by moving from one tab to another
  - o At DATA SOURCE NAME type: DWCMPS
  - o For DESCRIPTION type: COMPASS System Information
  - o Verify system is AS9625C
  - o At USER ID enter your assigned Userid for BrioQuery
- ➢ Click on SERVER TAB and type CMPS as default library
- ➢ Go to FORMAT TAB and change DATE format to mm/dd/yyyy(USA)
- ➢ Go to OTHER TAB and click on circle next to SQL object comment and make sure "Scrollable unless rowset size is 1" is checked
- ➢ Go to PERFORMANCE tab and change size to 128
- ➢ Click OK to leave this screen and then click on **OK at next screen**
- ➢ **Exit or close the IBM AS400 Client Access screen**
- ➢ Restart the System
- ➢ When you restart it may check the AS/400 version. If the system needs to load any upgrades or service packs it will prompt you. Just choose OK to begin AS400 Client Access upgrade
- ➢ At next screens choose NEXT, NEXT and just let it run
- ➢ When it is done it will ask if you want to View the README file. Click in box next to README to remove X and then click on NEXT
- ➢ It will ask to RESTART and you click FINISH
- ➢ Say Yes at prompt about 1 user connected to your system
- ➢ If it prompts you to install the AS400 Service Pack say OK
- ➢ Remove X at View readme and click on NEXT
- ➢ After it is finished click FINISH to restart the computer and Yes to restart
- ➢ Close all open windows on your Desktop after restart

## STEP 6: FINAL BRIO INSTALL
- ➢ Double click on Network Neighborhood icon on your Desktop
- ➢ Double click on ETS01
- ➢ Double click on SBBC
- ➢ Double click on WINDOWS
- ➢ Double click on APPLICATION
- ➢ Double click on DATABASE
- ➢ Double click on BRIO INSTALL

- ➢ Double click on BRIO INSTALL 6.2
- ➢ Double click on OCE
- ➢ Click once on COMPASS.OCE
- ➢ Click on Edit Menu then Copy
- ➢ Close all the Windows you just opened
- ➢ Double click on MY COMPUTER
- ➢ Double click on (C:) DRIVE
- ➢ Double click on PROGRAM FILES
- ➢ Double click on BRIO
- ➢ Double click on BRIOQUERY
- ➢ Double click on PROGRAM
- ➢ Double click on OPEN CATALOG EXTENSIONS (if the open catalog folder does not exist, create the folder by clicking on File -> New -> Folder and type in the name of the folder "Open Catalog Extensions" and press Enter)
- ➢ Click on Edit Menu then Paste
- ➢ Close all the open Windows
- ➢ Start Brio Software (Start, Programs, BrioQuery, BrioQuery Explorer)
- ➢ Enter serial number 318208409-300730377
- ➢ Once Brio starts, click on A New Database Connection File
- ➢ Click on the BROWSE button then double click on Compass
- ➢ Enter your Userid and Password
- ➢ Click on OK
- ➢ Look at the small "barbell" at bottom right corner of the screen. If the red **X** goes away you are successfully logged into the DataWarehouse