

Using BrioQuery Through Terminal Services

This document provides general instructions for using the BrioQuery program through Terminal Services. These instructions assume fundamental understanding of BrioQuery and how to use it. For detailed BrioQuery guides, go the PolyData Warehouse & BrioQuery Support Web site (<http://polydata.calpoly.edu>.)

You must first have Terminal Services installed and setup on your workstation. Review the instructions for Terminal Services at <http://software.calpoly.edu/CMS-WTS.html>.

Topics covered in these pages:

- Logging on to BrioQuery via Remote Desktop Connection (RDC)
- Change your PolyData / BrioQuery password
- Printing
- Saving Files
- Exporting Results
- Accessing Exported Results
- Running Saved Queries
- Log Off of BrioQuery and Terminal Services

Login

1. Start Terminal Services from the icon on your desktop.



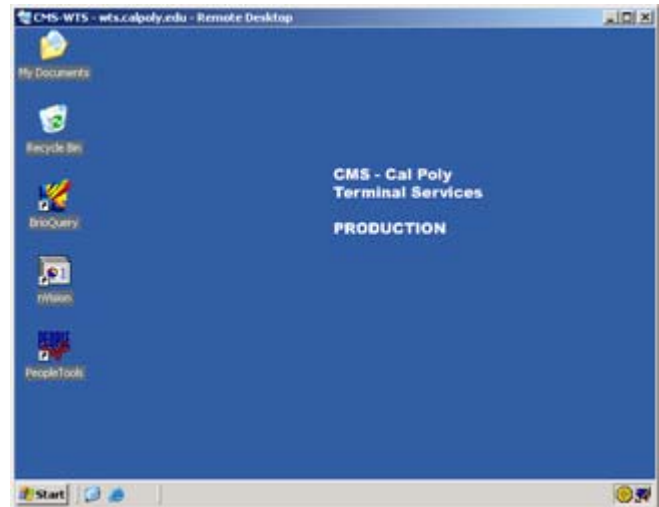
CMS-WTS.rdp

2. The Log On window will appear.

3. Login to Terminal Services using your Cal Poly username and password.

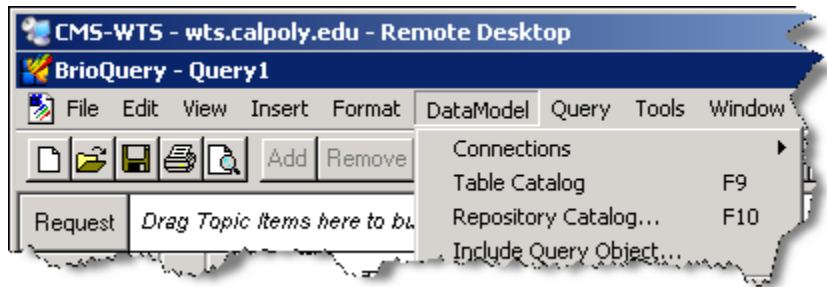


4. Click the BrioQuery icon on the desktop.



The BrioQuery application window will open.

5. Select **Table Catalog** or **Repository Catalog** from the **Data Model** menu.



The logon dialog box for **wrhsprod.occ** is displayed.

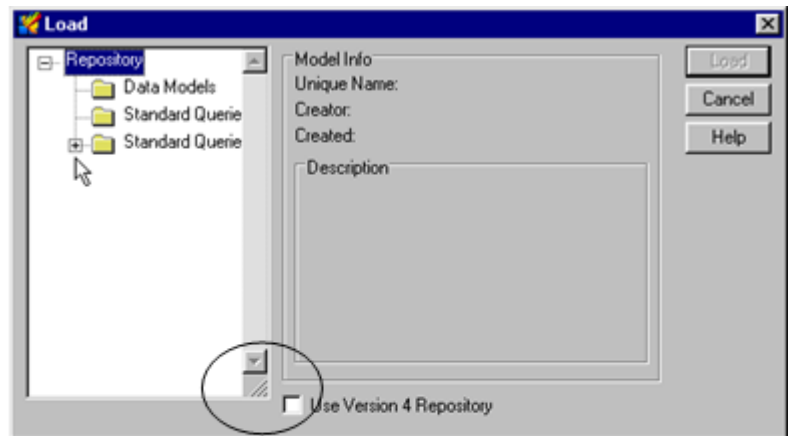
This login allows access to the HR, Finance and Student Admin data tables.

6. Logon using your BrioQuery username and password.



Running queries from the Repository

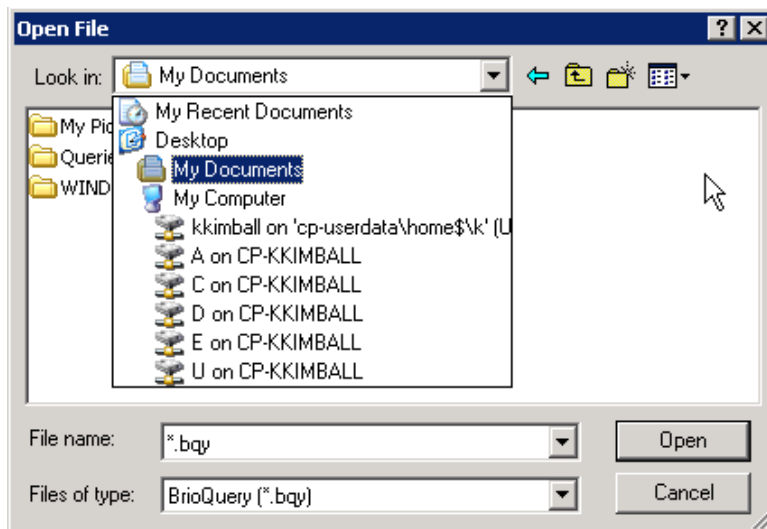
1. After successful logon the Repository window will be displayed.
2. Click the plus sign next to **Standard Query w/ Reports**.
If you can't see the complete name, click and drag the window sizing icon to expand the window.
3. Select a Query from the list.
4. Click **Load**



5. Click **Process**. Respond to prompts as appropriate.
6. After the query is processed the **Results** screen will be displayed.
7. Export the results or select a Detail, Pivot or Chart to view formatted results.

Running Saved Queries

1. Follow the instructions above for logging on to Brio.
2. Once BrioQuery is started, select Open from the File menu. The Open dialog box is displayed.



3. Select the drive that you saved the query on:
-- Your Home drive is listed as '**U on CP-username** > **My Documents**

4. Navigate to the folder that you saved your queries in.
5. Select the desired query with the .bqy extension and click the Open button.
6. Click the Process button to run the query and update the results.
7. From the File menu, select **Open**.
8. Select the drop-down arrow next to the Look in: field.
9. Select **My Documents** from the list.
10. All files that were created by you in the Citrix environment have been copied to a folder called Citrix Legacy Data in this location.
11. Continue opening folders within this area to locate the desired file.
12. Select the file and click the Open button.

Saving Files

It is recommended that you only save BrioQuery files to your WTS folder however if you must save them in another shared location follow these instructions.

1. To save a query, from the File menu select Save.
The Save dialog box is displayed.
2. In the Save in box, click the drop-down arrow and select the location where you want to save the file.
3. Select My Documents and select a folder to save the file to.
4. If you choose to save the file to your computer's hard drive you would select
 - a. Mac user: select the Mac workstation name
Note: Mac OS X users: Saving queries to your Mac hard drive may render them unreadable for future use.
 - b. Windows user: **C on CP-username >**
Documents and Settings > **username** > Desktop
5. Navigate to the folder that you save your files in.
6. Enter a filename for the query you are saving.
7. Click the Save button.

Exporting Results

Exported results of a query is the raw data generated from the query with no formatting. Exported content is best saved from the Results tab.

1. To export the results of a query, select the Results tab in the query.
2. From the File menu select Export then Section.

3. In the Save in box, click the drop-down arrow and select a drive. You may export results to any of the following areas with no risk of losing data:
 - a. Home drive: select My Documents or drive U:
 - b. Local Mac drive: select the Mac workstation name
 - c. Local Windows drive: select **C on CP-username** > Documents and Settings > **username** > Desktop
4. Navigate to the folder that you save your files in.
5. Enter a filename for the results you are saving.
6. In the Save as type: box, select the file type, Excel (.xls) is default. Use the drop-down arrow to select **Text(Tab delimited) (*.txt)**.
7. Click the Save button.

Printing

You can print to your local printers when connected to BrioQuery through a Terminal Services session.

1. From the File menu, select Page Setup to change the paper size or page orientation.
2. To Print, select the Print from the File menu.

Note: Contact your department workstation administrator or the Service Desk if you are unable to print. An update to the Terminal Services engine may be required.

Change your PolyData / BrioQuery Password

If you know your current PolyData password, you can change it after you log in to BrioQuery. Rules for PolyData passwords are slightly different from rules for Cal Poly passwords:

- Do not start with a numeric character.
- May contain from 8 to 30 characters; 8 characters are recommended.
- Use alphabetic or numeric characters.
- Avoid using special characters like space, *, ', ", #, _, @, \$, etc.
- Avoid using names, common words, or easily guessed numbers (such as birthdays or phone numbers) to make the password more difficult to guess.
- Certain ORACLE database reserved words are disallowed, for instance "schema".
 1. Log into WTS.
 2. Launch BrioQuery.
 3. From the **Data Model** menu, select **Table Catalog**.
A Login prompt will appear.
 4. Enter your PolyData user name and password to login to BrioQuery.

5. From the **Edit** menu select, choose **Change Database Password**.
6. Enter your current PolyData password.
7. Enter new password twice in the two fields provided and click the OK button.
8. The PolyData password has been changed successfully when the **Change Database Password** dialog box closes.

Close the Remote Desktop Connection

It is important that you close active applications and shutdown your Terminal Services session properly.

1. Exit BrioQuery by selecting Exit from the File menu.
2. Select the Start button in the lower left corner.
3. Click the Log Off button.
4. When prompted, click the Log Off button on the Confirmation message.