Demonstration

IT Partners

April 19, 2005

Introduction to the MIT Data Warehouse

Downloading, Processing and Making Minor Modifications to Standard Reports

DOWNLOADING STANDARD REPORTS IN BRIO QUERY VERSION 6

Downloading a standard report template is easy. On the Data Warehouse home page, find the Reports section: you will see several choices. Click on the link to the business area that you want. Production Directory and Web Statistical Reports are in the General report area. You will see that the report templates are subdivided them into areas named "Employee Directory, "Keys," and "Web Statistics." Clicking on "Web Statistics" will jump you to the reports related to Web Statistics. You could also scroll through the page until you come to the reports you want; the page is alphabetical by subarea. Each report has a brief description of its purpose to help you decide which one you want to look at.

When you find a report you want to download. click on"PC6" or "Mac6" (or "PC5" or "Mac 5" for older reports) under the report name, depending on your platform.

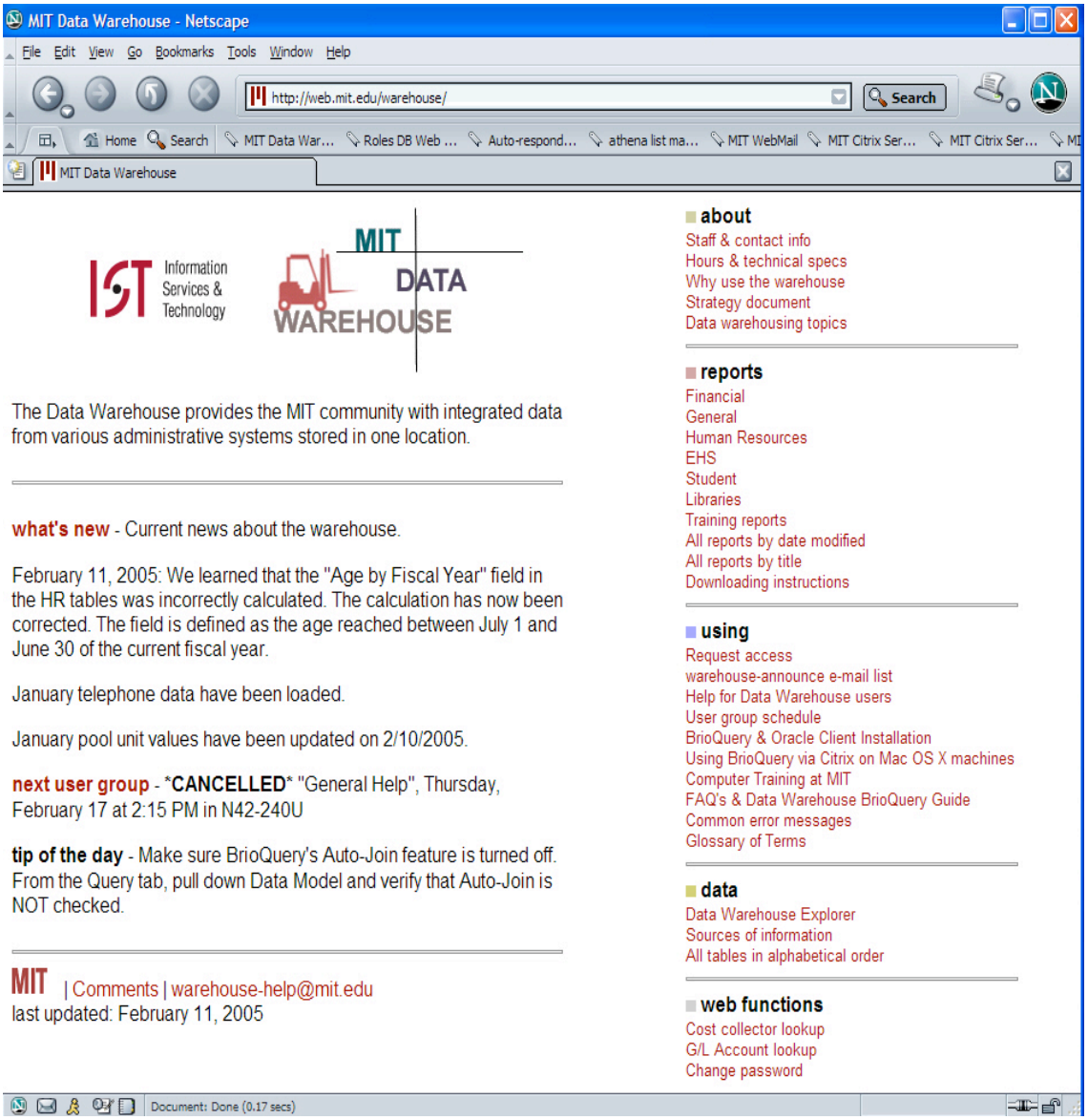
> NOTE: All new reports will be available ONLY in BrioQuery version 6. We will leave existing version 5 reports on the web for an overlap period to enable users become comfortable with version 6.

Both PC and Mac templates work on both platforms; the difference is that the fonts and margins are formatted to look and print best on the specific platform, since the same font and font size looks very different on a Mac monitor than a PC monitor, and pages also print differently.

Important note to Mac OS X users: Brio does not have a desktop version for Mac OS X. Mac OS X users should use Citrix (see Appendix 2), a PC emulator which allows you to run the PC version of Brio on MIT's Citrix server on your OS X Mac. You should download the PC version, rather than the Mac version, of query templates from the warehouse web pages for use via Citrix.

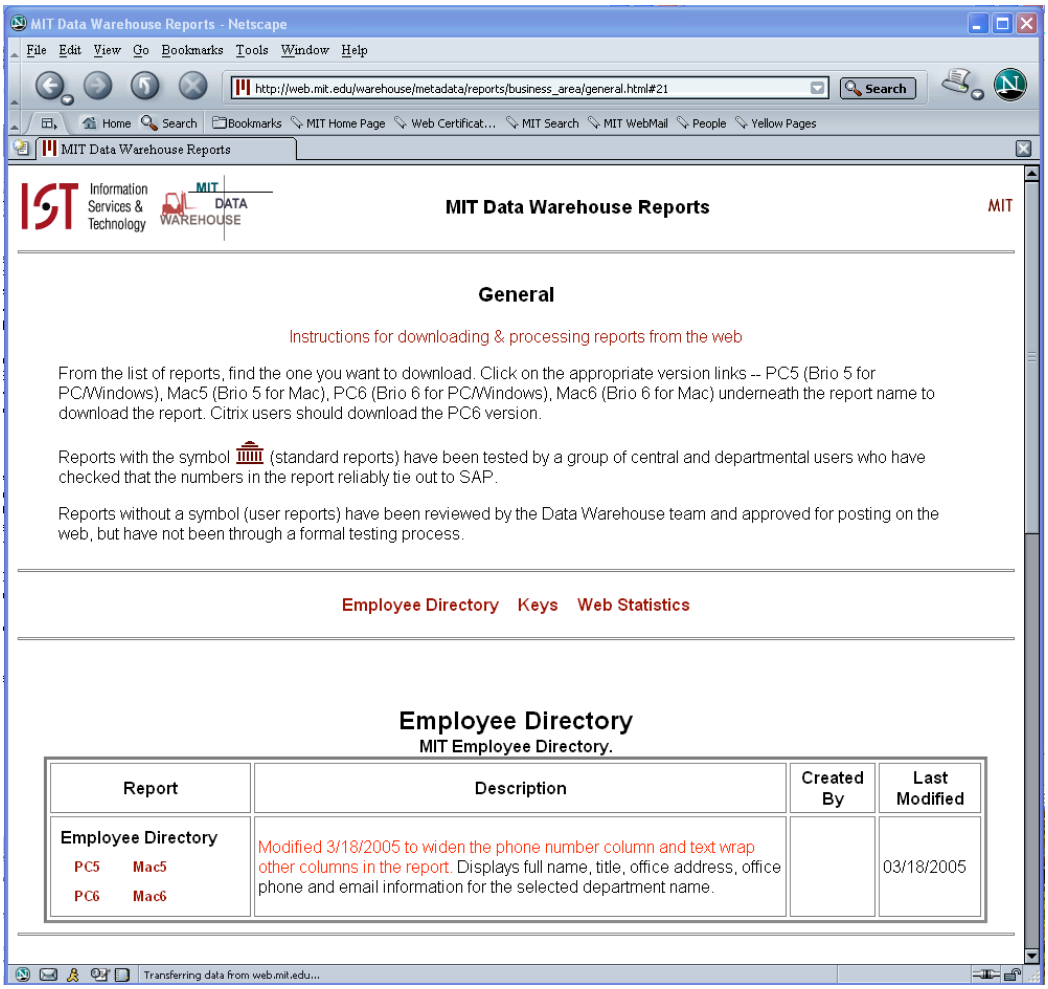
Below you will find instructions for downloading canned report templates from the Data Warehouse:

From the Data Warehouse home page, click on the business area, in this case General.



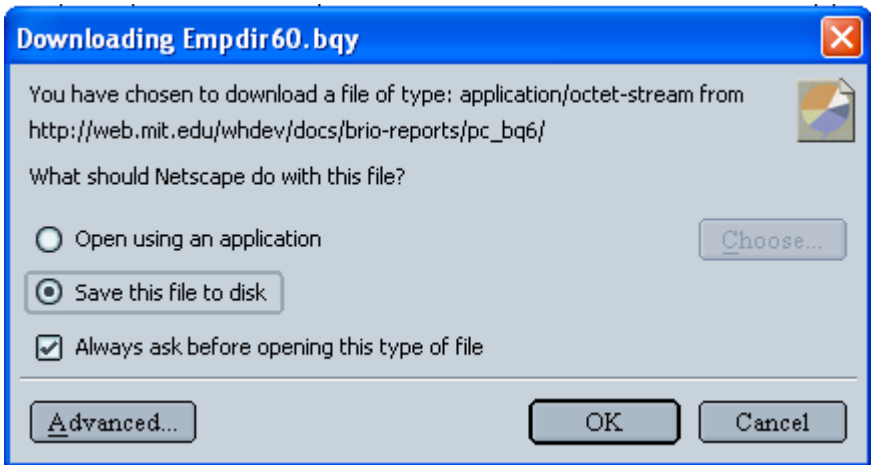
The Data Warehouse Home Page: click on "Human Resources" under reports.

This takes you to the page of General reports:



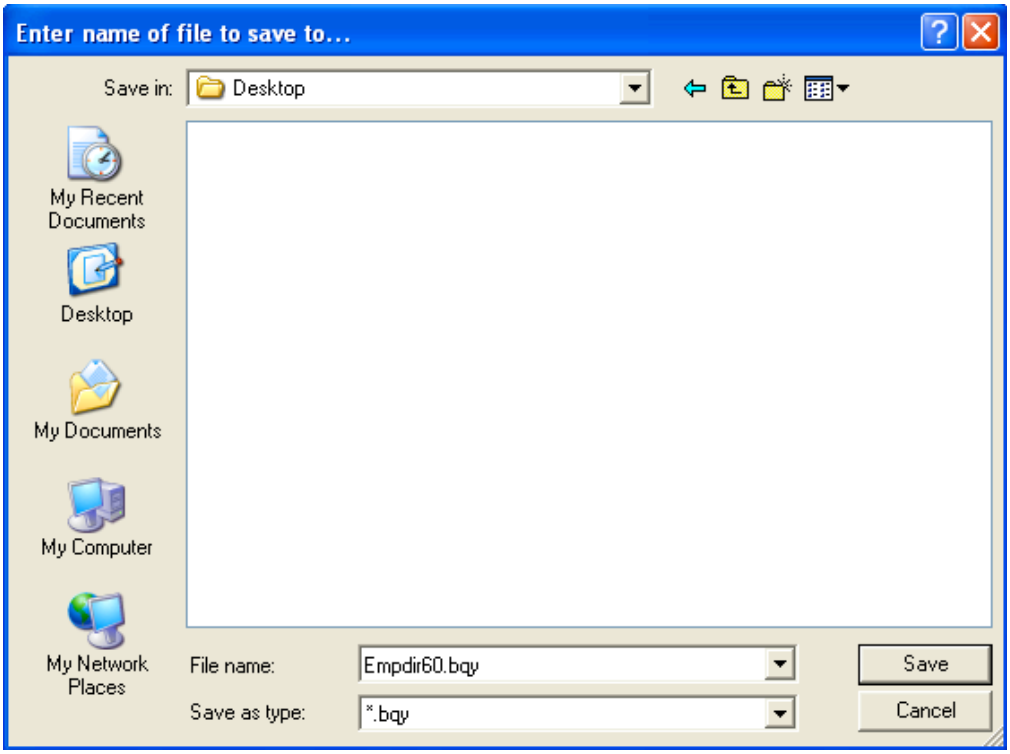
Downloading a Report: Click on "PC6" or Mac6" under the report name

When you click on Mac 6 or PC6, the "Downloading…" dialog box opens (Netscape 7): The radio button "save this file to disk" should be checked by default; if not, check it.

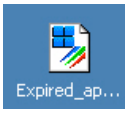


The Netscape 7 "Download" dialog box

In the next box, navigate to the folder in which you wish to save the template:



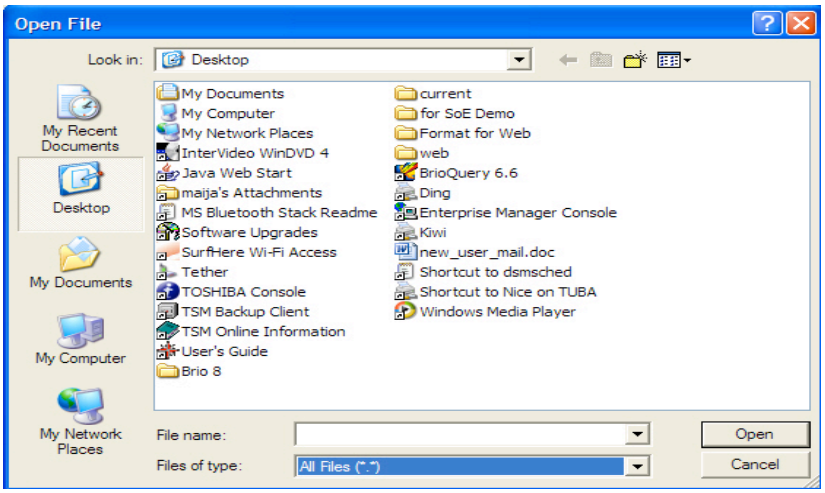
The "Save As…" Dialog box

1. Choose the Directory folder in which you want the report to be saved.
2. Click on the Save button. The report icon appears on your desktop. 

3. To open the report, just doubleclick on it.

Note: Mac OS X users will find that the downloaded template is a blank white icon or an icon looking like an Excel icon, rather than an icon with the BrioQuery blue, green and red colors. Citrix will recognize this as a BrioQuery document. If you are using the desktop version of BrioQuery under Classic (OS 9.2) on your Mac OS X computer, you will not be able to open the template by doubleclicking on it. In this case, you should open the Brio Query application and use File --> Open to open the template.

Note: By default, the Brio "File Open.." command looks for files of type Brio Intelligence. Be sure to change this to "All Files (*.*)" in the dialog box that opens so that you can find the file:

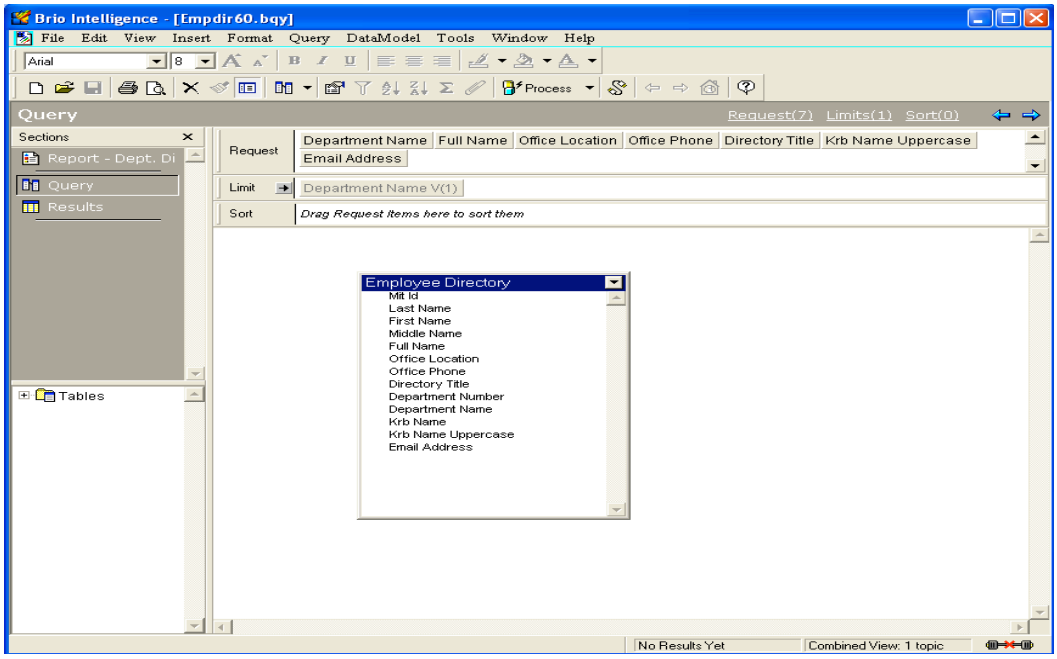


The "Open File" dialog box with Files of type: All Files (*.*) selected

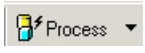
THE BRIO QUERY V.6X ENVIRONMENT

Those of you who have used BrioQuery version 5 will see that BrioQuery version 6 has a different look and feel, but the process of looking at the data in today's class should familiarize you with the new look. A summary of the BrioQuery v.6 menus, toolbars, and sections is in Appendix 3 at the end of this document.

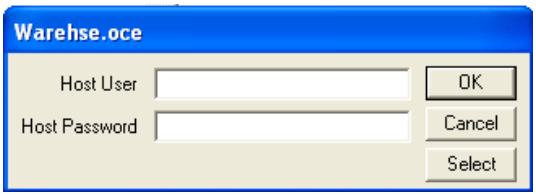
When you open a report template, it will open to the Query section:



PROCESSING STANDARD REPORTS

1. To run a report you have downloaded and receive results from the database, press the "Process" button at the top of your screen. 

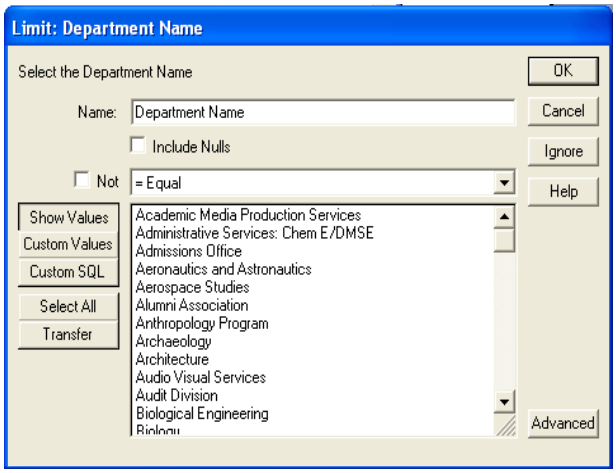
2. You will be prompted to log on to the warehouse. If needed, select the OCE (open catalog extension) named warehse.oce. You will need to enter your username (your Kerberos ID) and the warehouse password you chose when you received authorization to use the warehouse.



The log on box

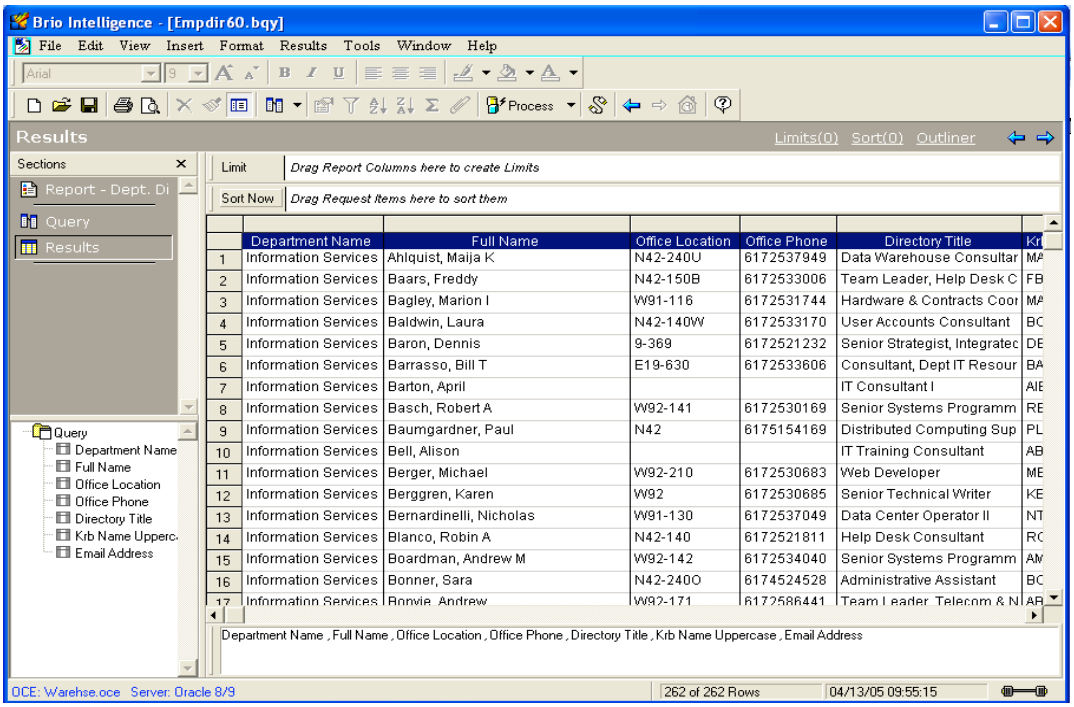
Note: if you have forgotten your Data Warehouse password, you can change your password without knowing the old one by going to http://web.mit.edu/warehouse/change_password.html or by clicking on the Change Password link under Web Functions on the Data Warehouse home page.

3. Depending on the report you are processing, you may be prompted to enter one or more limits. In the dialog box that appears, a short text message is displayed to assist you with your limit selection. In today's example, we will be asked to select a Department Name for your directory reports. We will to ask for Department Name Equal to Information Services & Technology. This should return all employees that have their directory department set to Information Services & Technology.



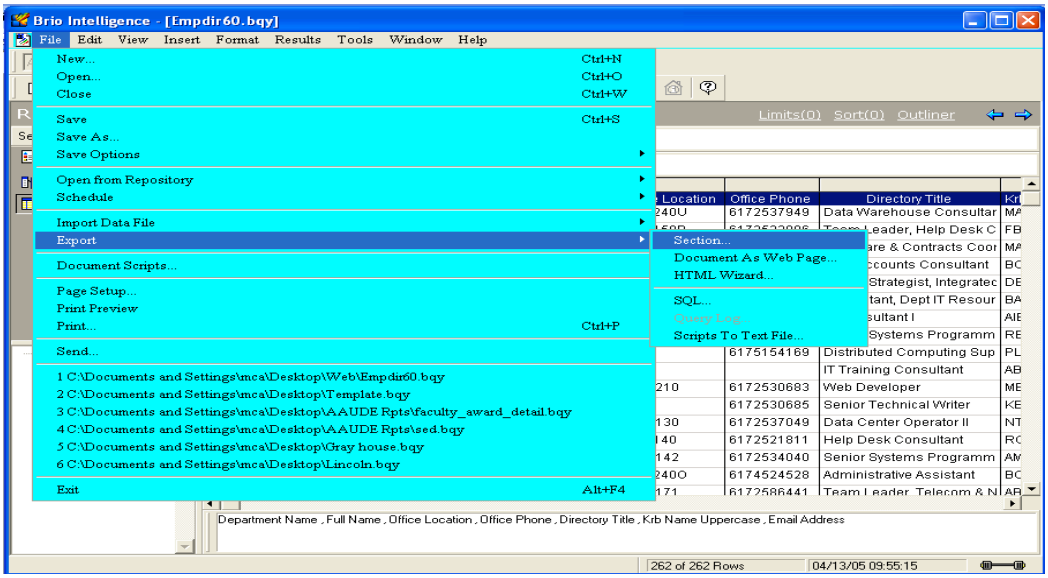
The Limit Box

4. Once results are retrieved you will be automatically transferred to the "Results" section, where you may view your results. You will see many rows of information. This is your raw (unformatted) data:



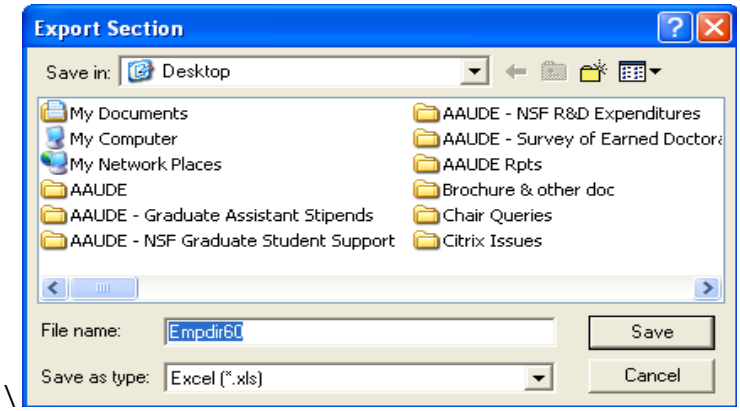
The Results Section

You may export your Results, or any section other than the Query section, to Microsoft Excel, HTML, or a text file if you want to combine it with other local data. To do this, you must be in the section you wish to export: for example, Results.



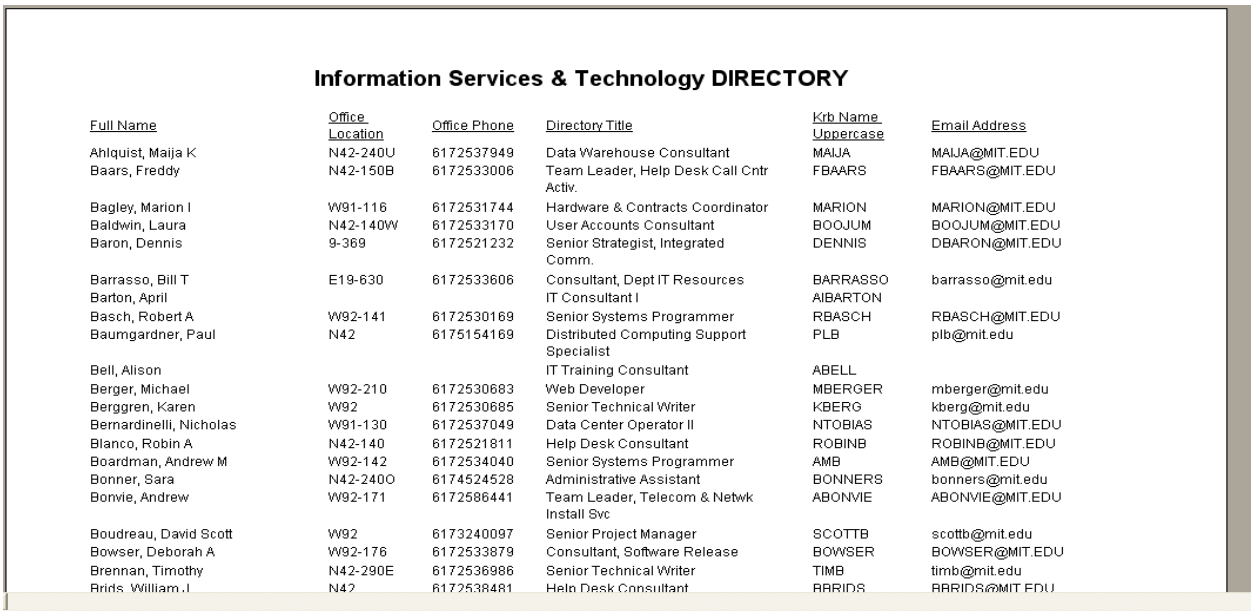
The File >> Export >> Section path

1. From the File Menu, choose Export --> Section. When the Export section dialog box opens, choose the desired export format from the "Save as type" dropdown list, navigate to the folder in which you want to store the export, and click Save. The export happens instantly.



The Export Section Dialog Box

There will also be one or more pre-formatted reports in any query document that you download from the Data Warehouse reports page.



Information Services & Technology DIRECTORY

Full Name	Office Location	Office Phone	Directory Title	Krb Name Uppercase	Email Address
Ahlquist, Maija K	N42-240U	6172537949	Data Warehouse Consultant	MAIJA	MAIJA@MIT.EDU
Baars, Freddy	N42-150B	6172533006	Team Leader, Help Desk Call Cntr Activ.	FBAARS	FBAARS@MIT.EDU
Bagley, Marion I	W91-116	6172531744	Hardware & Contracts Coordinator	MARION	MARION@MIT.EDU
Baldwin, Laura	N42-140W	6172533170	User Accounts Consultant	BOOJUM	BOOJUM@MIT.EDU
Baron, Dennis	9-369	6172521232	Senior Strategist, Integrated Comm.	DENNIS	DBARON@MIT.EDU
Barrasso, Bill T	E19-630	6172533606	Consultant, Dept IT Resources	BARRASSO	barrasso@mit.edu
Barton, April			IT Consultant I	AIBARTON	
Basch, Robert A	W92-141	6172530169	Senior Systems Programmer	RBASCH	RBASCH@MIT.EDU
Baumgardner, Paul	N42	6175154169	Distributed Computing Support Specialist	PLB	plb@mit.edu
Bell, Alison			IT Training Consultant	ABELL	
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Berggren, Karen	W92	6172530685	Senior Technical Writer	KBERG	kberg@mit.edu
Bernardinelli, Nicholas	W91-130	6172537049	Data Center Operator II	NTOBIAS	NTOBIAS@MIT.EDU
Blanco, Robin A	N42-140	6172521811	Help Desk Consultant	ROBINB	ROBINB@MIT.EDU
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Bonner, Sara	N42-240O	6174524528	Administrative Assistant	BONNERS	bonners@mit.edu
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Boudreau, David Scott	W92	6173240097	Senior Project Manager	SCOTTB	scottb@mit.edu
Bowser, Deborah A	W92-176	6172533879	Consultant, Software Release	BOWSER	BOWSER@MIT.EDU
Brennan, Timothy	N42-290E	6172536986	Senior Technical Writer	TIMB	timb@mit.edu
Brids, William J	N42	6172538481	Help Desk Consultant	BBRIDS	BBRIDS@MIT.EDU

A formatted Report section

To create a report, field names are dragged from the lower pane of the section catalog into what Brio calls the Outliner (for Pivot reports, Tables, and Charts) or the "Groups" and "Tables" boxes (Report Generator reports).

The Report section outliner boxes

The Groups section contains the major categories of your report – the levels at which any numerical data, for example, headcounts, could be subtotaled and totaled. The Tables Dimensions box contains the fields that serve as "labels" and the Tables Facts box contains the data items that will be subtotaled or be used in calculations.

Pivot Reports

		Count of Employees by Directory Title
Information Services & Technology	Team Leader, Telephone Client Support	1
	Team Leader, Telephony Information Ctr	1
	Team leader, VM System Services	1
	Team Leader, Voice/Data Strategies	1
	Team Leader, Web Communications Svc	1
	Tech Help Consultant	6
	Tech/ Q A/Web Services, Group Lead	1
	Technical Project Manager	1
	Telephone Operator	3
	Telephony Help Desk Assistant	1
	Training Consultant	1
	Unix System Administrator	1
	UNIX Systems Administrator	3
	User Accounts Consultant	1
	VM System Programmer	1
	VM System Programmer & TSM Coordinator	1
	VM System Programmer/Asst Team Leader	1
	VM Systems Programmer	1
	Voice/Data Coordinator	3
	Voice/Data Project Coordinator	1
	Web Accessibility Specialist	1
	Web Consultant	2
	Web Content Editor	1
	Web Developer	3
	Web Services Consultant	1
	Web Services Coordinator	1
	Web Technologies Consultant	1
..		
Total		**262**

Example of a Pivot Report

Notice that the Outliner looks a little different than the "Report" outliner.

1. The "Side Labels" box contains the fields that comprise the columns to the left of the data section.

2. The "Top Labels" box contains the fields that provide the category headers for the fields placed in the Facts box:

3. The "Facts" box contains the fields of numerical data – Count of Employees by Directory Title (this is actually the count of Names), or other fields that will be totaled or counted.

USING BRIOQUERY VIA CITRIX ON MAC OS X MACHINES

BrioQuery does not have a desktop version for Mac OS X machines. Citrix is a PC emulator that allows you to run the PC versions of MIT's enterprise applications on your Mac OS X. In addition to BrioQuery, you can also run Coeus, Adonis, Roles, SumMIT and SAP via Citrix.

You must register for Citrix before you can install and use it. To register for Citrix, go to https://citrix.mit.edu/register (MIT certificates required).

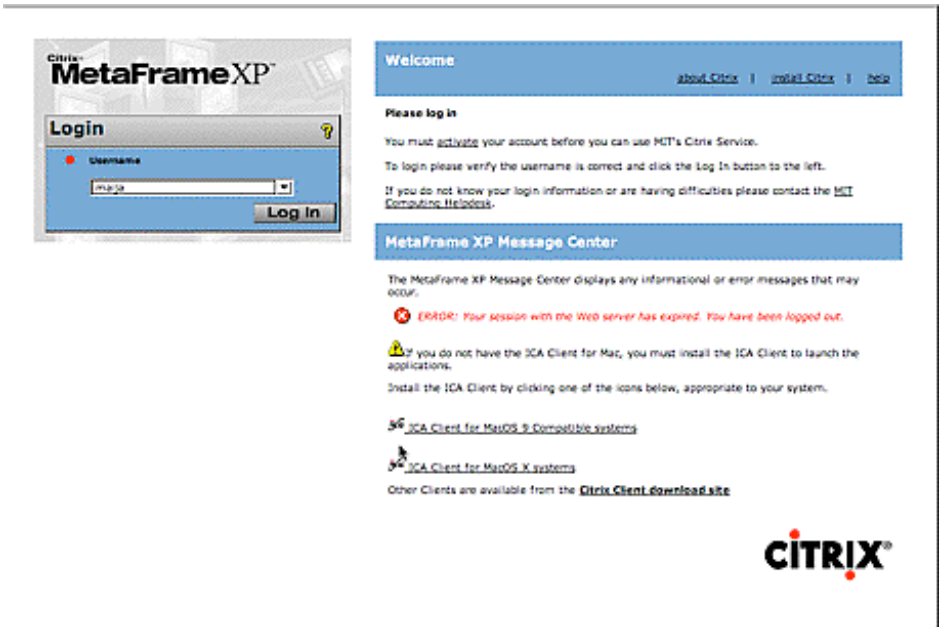
Full instructions for installing Citrix are on the Citrix home page at https://citrix.mit.edu/citrix/install.html (MIT certificates are required); these instructions also appear below for your convenience.

> **Note:** To use Citrix, your Kerberos password cannot be more than three years old. If your kerberos password exceeds this age limit, you need to change your Kerberos password. Mac OS X users can do this by opening the Utilities folder in the Applications folder, scroll until you find the Kerberos icon, double-click on it to open it, and click on "Change Password."

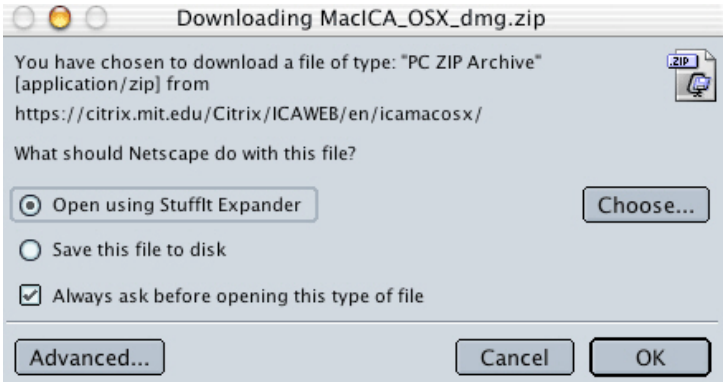
Installing Citrix

After you have registered for Citrix,

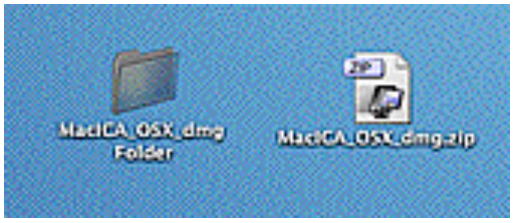
1. Go to http://citrix.mit.edu/
   Result: The Citrix Welcome page displays.



2. Click the **ICA web client for MacOS X systems** icon over to the right under the "Metaframe XP Message Center" heading.
   Result: The Downloading MacICA_OSX_dmg.zip window displays.

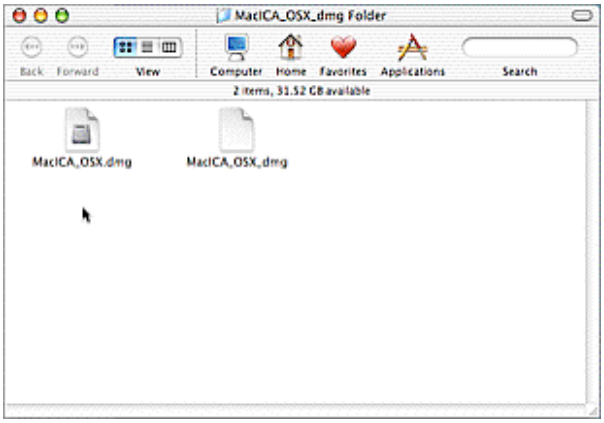


3. Select **Open using StuffIt Expander** and click **OK**.
   Result: The folder MacICA_OSX_dmg and the file MacICA_OSX_dmg.zip will appear on the desktop.



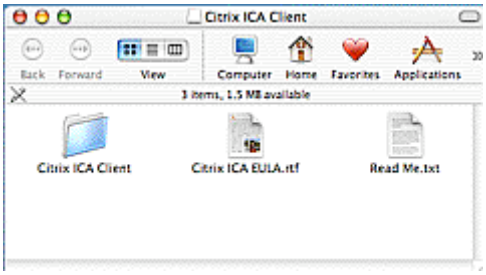
4. Double-click the **MacICA_OSC_dmg** folder.

   Result: The folder will open.



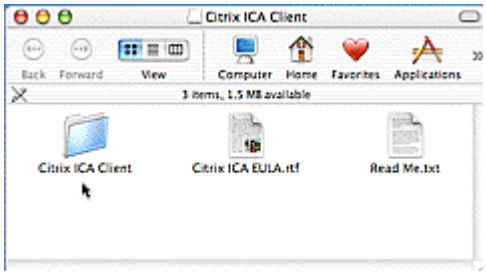
5. Double-click **MacICA_OSX.dmg** (the one with the hard drive icon).

Result: The Citrix ICA client folder will open,

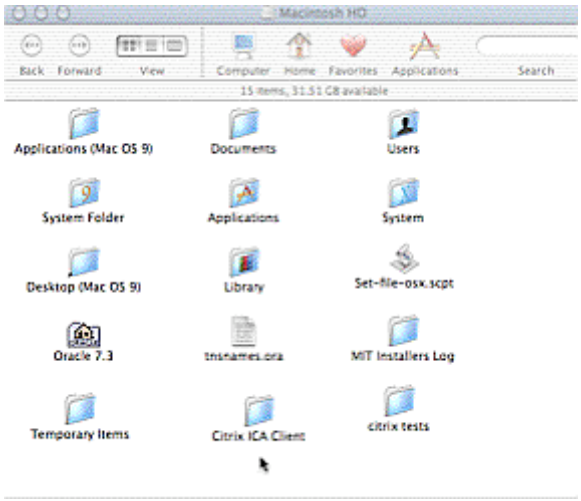


and a Citrix ICA Client volume will be mounted on the desktop.

Drag the **Citrix ICA Client folder icon from the open folder window to your hard drive:**



Result: The Citrix folder will now appear in the hard drive. You may wish to put it in your Applications folder.



6. Close all windows that have been opened during the Install process.

7. Drag the following files/folders (created during the Install) to the Trash:

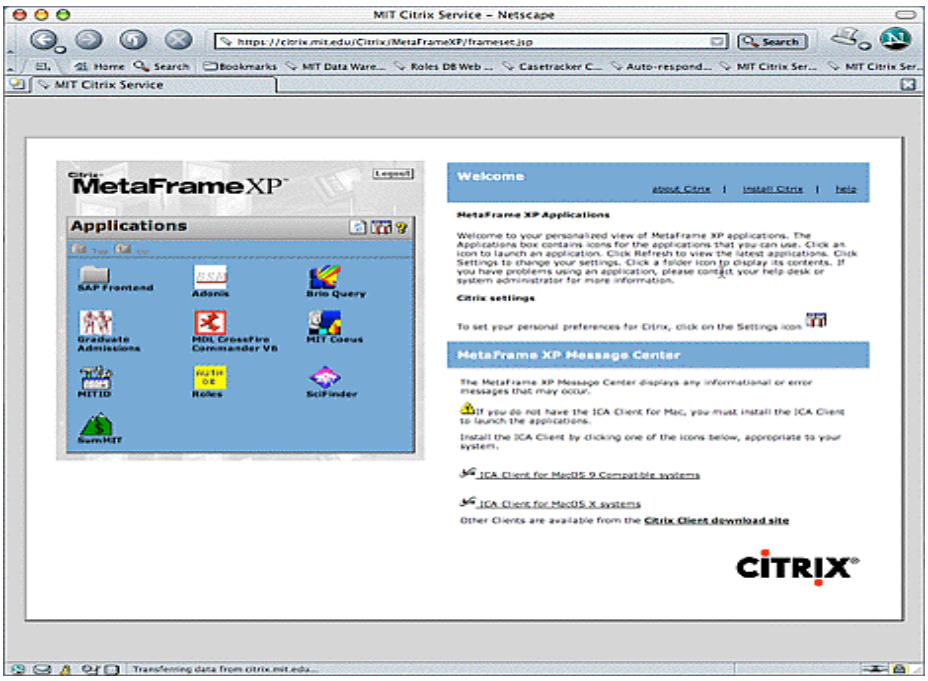
MacICA_OSX_dmg folder
MacICA_OSX_dmg.zip
Citrix ICA Client mounted volume

Result: The files that are no longer required will be deleted.

8. Open your browser, and go to http://citrix.mit.edu/
   Result: The Citrix welcome page will appear; your username should be displayed in the Login box.

9. Click **Login.**

10. *Result:* The Citrix Applications page will appear.



11. Select one of the applications by double clicking on its icon, for example BrioQuery.

Note: You will only be able to access applications for which you are authorized.
Result: The first time you use Citrix, the Citrix Client Software License Agreement will appear.

Click **Accept**.
Result: A connection will be made to the Citrix Server. The Windows2000 Advanced Server Log on screen appears.

12. Enter your Kerberos user name and password and click **OK**.
Result: The application you selected will open.

When using BrioQuery via Citrix on a Macintosh, you are actually using BrioQuery for Windows and not BrioQuery for the Mac. BrioQuery for Windows is the same as BrioQuery/Macintosh as far as features and commands; however there are some differences since you are accessing BrioQuery via Citrix. Below are differences you will encounter:

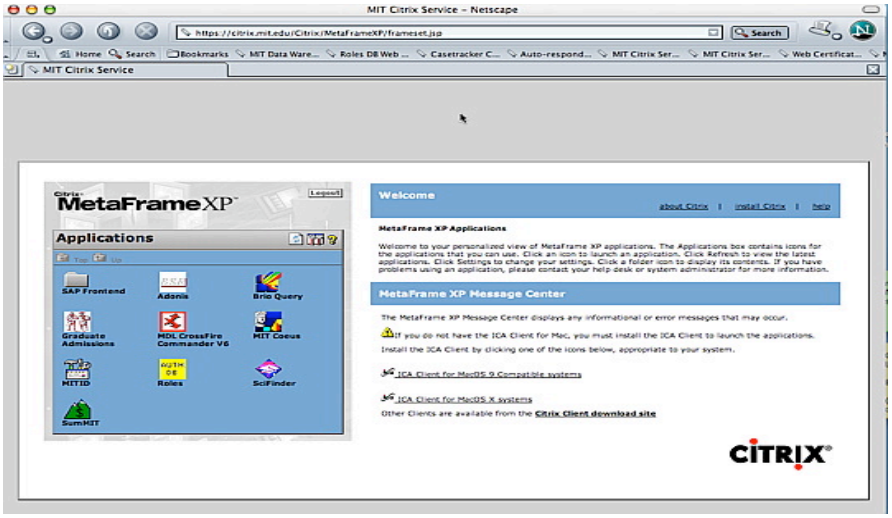
Downloading BrioQuery templates:

Since you'll be using BrioQuery 6 for Windows via Citrix, be sure to download the **PC6** versions of BrioQuery templates from the Data Warehouse web site. Mac versions may not look as

Changing the window size:

BrioQuery in the Citrix window cannot be maximized to the fill the screen by using the + sign in the upper left corner of the Citrix window or by using the Maximize button in the top right corner of the BrioQuery application window. If you want to make the window larger, do the following:

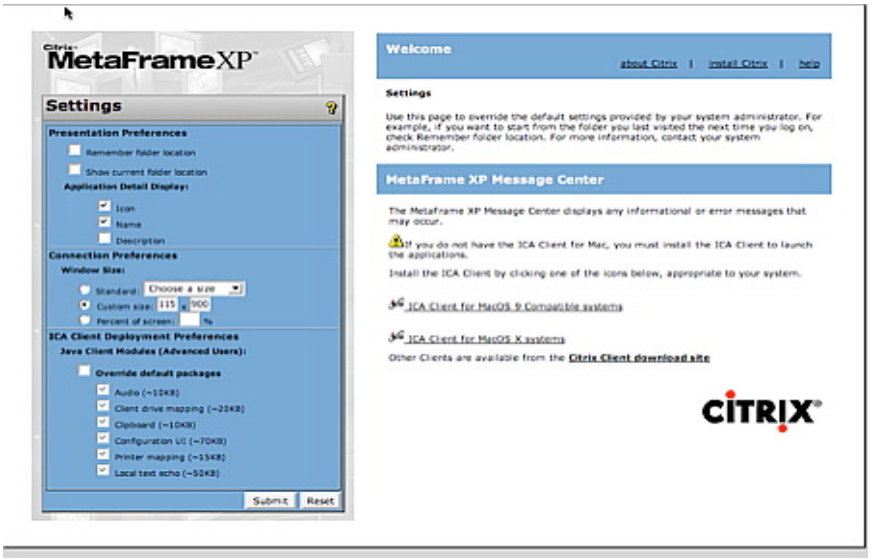
Go to the Citrix home page and log in.



The Citrix Home page

In the Applications area under "Citrix MetaFrame XP" click on the Tools icon:

Result: The Settings dialog box displays.



The Citrix Settings Page

Under "Connection Preferences: Window size" specify a custom size: Mac BrioQuery users should set a custom size of 1024 x 768.

Click Submit. (**Note**: If the **Submit** button doesn't appear in the window, use the scroll bar on the right side to scroll to the bottom.)

Back in the Applications area, click on the BrioQuery icon to download the .ica file you'll use to launch BrioQuery via Citrix. (If you've previously downloaded a launch.ica file, replace it with a new one to retain the changes you just made.)

Result: When you double-click on the .ica icon, Citrix launches and a window displays at the size you specified. Any time you want to change the window size, repeat steps 1 – 5 and save a new ica.

Keyboard shortcuts

Since you're running BrioQuery for Windows, make sure you use the BrioQuery (Windows) keyboard shortcuts rather than the BrioQuery (Macintosh) shortcuts. For example, to open a file, press **<control>-O**.

CONTEXT-SENSITIVE MENUS

To access the BrioQuery context-sensitive menus, place your pointer on the item, then press **<option>-click**.

Opening and saving files

The Open and Save dialog boxes do not display the name of your local hard drive(s) but instead display drive letters and terms used in Windows 2000, e.g., **Local Disk [C:]**. Your desktop hard drive is the "V" drive. One of the items in the popup list in the Open or Save dialog box (**C$ on 'Client'[V:]**) gives you access to your account folder inside the **Users** folder on your startup drive. You'll need to store any BrioQuery files you download or create inside this folder in order to open them in BrioQuery via Citrix.

To open or save a file, do the following:

Go to either **File>Open...** or **File>Save As...**.

Result: A message displays, "Program requires READ access to the "C" drive which maps to the folder ***hdname*:Users:*user_folder*** (where ***hdname*** is the name of your hard drive and ***user_folder*** is the name of your account folder in the **Users** folder). Do you want to allow or deny READ access to this folder for the rest of the session?"

Click **Allow**.

Result: The Open or Save As dialog box displays.

Click on the arrow to the right of the **Program** folder and select **C$ on 'Client'[V:]** from the list to go to your local hard drive.

Result: The folders inside ***hdname*:Users:*user_folder*** display.

Save the file.

Note: You can't freely navigate your hard drive through the Open or Save As dialog boxes so you may want to keep all BrioQuery files inside your account folder inside the **Users** folder. You may want to create a subfolder specifically to store your BrioQuery files. Otherwise you will have to navigate through **C$ on 'Client'[V:]** for each document.

PRINTING

You need to go through some additional dialog boxes to print, unlike when you print using a Macintosh program on your local machine. To print,

In BrioQuery, go to **File>Print…**

Result: The BrioQuery (Windows) dialog box displays.

Click **OK**.
Result: The Macintosh Print dialog box displays.

Note: If the Macintosh Page Setup dialog box displays, choose your printer from the **Format for:** popup list, then click **OK**.

From the **Print:** popup list, choose your printer, then click **Print**.

Important Note: You may find that you cannot use "advanced" page setup functions (changing from portrait to landscape, scaling). We've been told that an up-coming release from the vendor will fix this limitation, after which printing to your local printer with the full functionality of your printer's capabilities should be seamless. Meanwhile, although non-ideal, there is a temporary fix available. You will need to register your printer on the Citrix server. To do this, send your request to system-citrix@mit.edu. They will need to know the zone you are in, the make and model number of your printer, and its IP address (if your printer has a unique name that appears in your local printer list, rather than the generic model name, you can put your printer's name in the message rather than its IP address).

Note to new Mac OS X users: you will find the Print Center application in the Utilities folder in the Applications folder on your OS X. This replaces the OS 9 Chooser for setting up printers.

APPENDIX 1: BrioQuery v.6 Menu Bar and Toolbars

The Menu Bar:

The first five categories on the menu bar will be familiar to you from other applications, as will the Window menu:

File	File management tasks such as New Query, Open, Close, Save, Print, and most recently used list of queries. The "Save Options" allows you to choose whether to save your query results when you save your document.
Edit	The familiar Cut, Copy, Paste options, and options to Delete, Rename, or Duplicate a section.
View	From the View menu you can toggle on and off the display of the Standard, Formatting, and Section toolbars, the Section Catalog panes, the Section Title Bar, and the Status Bar.
Insert	Insert new sections
Format	Formatting font and number
Window	Lets you toggle between open BrioQuery documents

The Query, Data Model, and Tools menu commands are more specific to BrioQuery documents. Some highlights are:

Query	Estimate Query Size will tell you how many rows of data will be returned when the Query is processed.
Data Model	Query Options lets you instruct Brio to bring back only a small number of rows if you aren't sure what you will be bringing back and want to see before bringing back a larger result set.
Tools	Lets you customize default formatting options, and instruct Brio to remember your user name after the first time you log on (see Note box to set your user name as the default user name).

The Standard Toolbar:

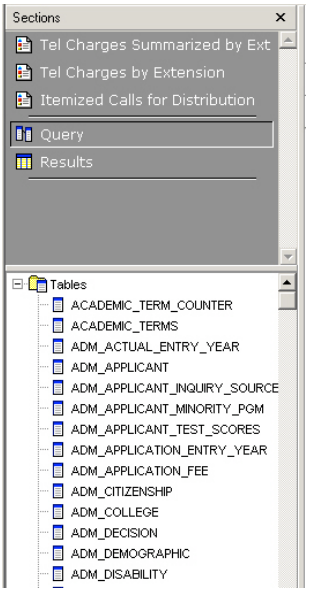
The first five buttons are familiar file management tools: New Query, Open, Save, Print, and Print Preview. The sixth button is the remove button and duplicates the action of the Delete key. The remaining buttons may be active or inactive depending on the item selected.

The Formatting Toolbar:

The tools in the formatting toolbar should also be familiar from other software products such as Microsoft Office; they are used to format and align text in reports.

The Section Title Bar:

The Section Title Bar is where you turn on and off your limit and sort lines, your Outliner, etc. What you see in the Section Title Bar is context sensitive, i.e., you have different options depending on what section you have active: two examples are shown below. The Query section title bar lets you toggle on and off the Request, Limit, and Sort lines, and also shows you how many items you have in each. The Results section title bar lets you toggle on and off a limit line, a sort line, and an Outliner box.

The Section/Catalog:

This area replaces both the Brio 5 section tabs and its free-floating Table Catalog. The BrioQuery Section/Catalog panes can be toggled on and off from the View Menu. The top pane lists all of the Sections in your BrioQuery document: the Query section, Results section, and any preformatted report sections. For those of you familiar with BrioQuery version 5.x, this section catalog replaces the Brio version 5 section tabs at the bottom of the window. The lower pane is the Data Warehouse Table Catalog, which is no longer a free floating window as it was in BrioQuery version 5.x. The table names you see will depend on the warehouse business areas you are authorized to see.