

DATALINKS™ QUICK START GUIDE

DataLinks allows you to *access all your data* regardless of its location or format from one user interface, *build custom reports* using drag-and-drop tools and *push the resulting data set to Excel* where it can be *refreshed live* against the data source with one click of your mouse.

Using DataLinks you can connect to virtually any data source regardless of file format. DataLinks has built in connectors to the following data formats and can be configured to connect to any ODBC compliant data source:

SQL Server

DB2 AS400

Oracle

CSV (Comma delimited)

Access

Excel

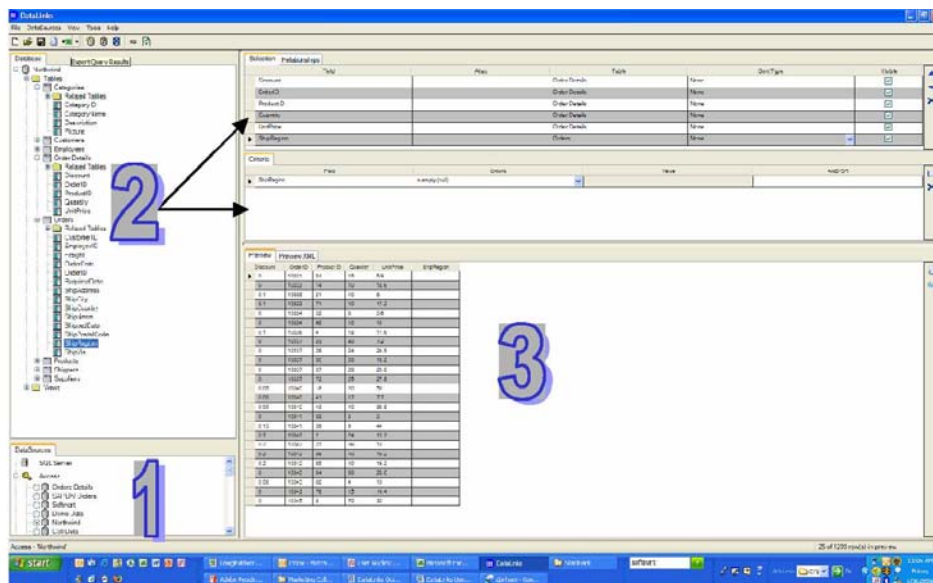
DB2 Client Server

ODBC

Normally, you will generate the report in an Excel workbook, where you can manipulate the data further, create graphics, and print. DataLinks also allows you to export your report in XML or CSV formats so you can manipulate the data using other third-party tools.

Using DataLinks to create a refreshable report in Excel is an easy three step process:

1. Create a connection to a data source.
2. Build your query exactly the way you want it in your report.
3. Preview your report and export the data to Excel.



It's really that simple. *Once the report has been created in Excel you can refresh it back to the data source with one click of the mouse in Excel!*



Before we show you how to create your report if you have not already done so, download and install DataLinks using the following instructions.

Installing & Activating DataLinks

1. Click on the link below to begin the download process

<http://www.BusinessIntelligenceLLC.com/trialinfo.php>

Please enter your user information and proceed to the download page.

1. The file download dialog box will prompt you to Open, Save, or Cancel. We suggest you choose 'Save' and choose a convenient location (such as the desktop) on your computer.
2. Once the download is complete, go to the downloaded file (DataLinks.zip) and double-click on the file.
3. Launch the file 'Setup.Exe'. This will start the installation wizard. Answer the questions presented until the process is completed, then press the 'Close' button. DataLinks is now installed.

Starting DataLinks and Activating Your License

1. Launch DataLinks. Click Start > All Programs > Business Intelligence > DataLinks.
2. On opening you will be prompted to Active DataLinks. Click on the 'Activate DataLinks' button. (NOTE: The Use Trial Version button is available for a limited period of time from when the product is originally installed. After that you will need to purchase a license to continue to use the product.)
3. The DataLinks Activation dialog box will appear. After reading the license agreement check the 'I Agree to All the Terms and Conditions Listed Above' box and type in the serial number provided to you at the time of your purchase.

You are now ready to use DataLinks.

Navigating the DataLinks User Interface

DataLinks can be started from the Windows Start menu by selecting Start > All Programs > Business Intelligence > DataLinks or you can start DataLinks from within Excel clicking on the BI Logo in the DataLinks toolbar. The DataLinks user interface consists of a window with five panes.

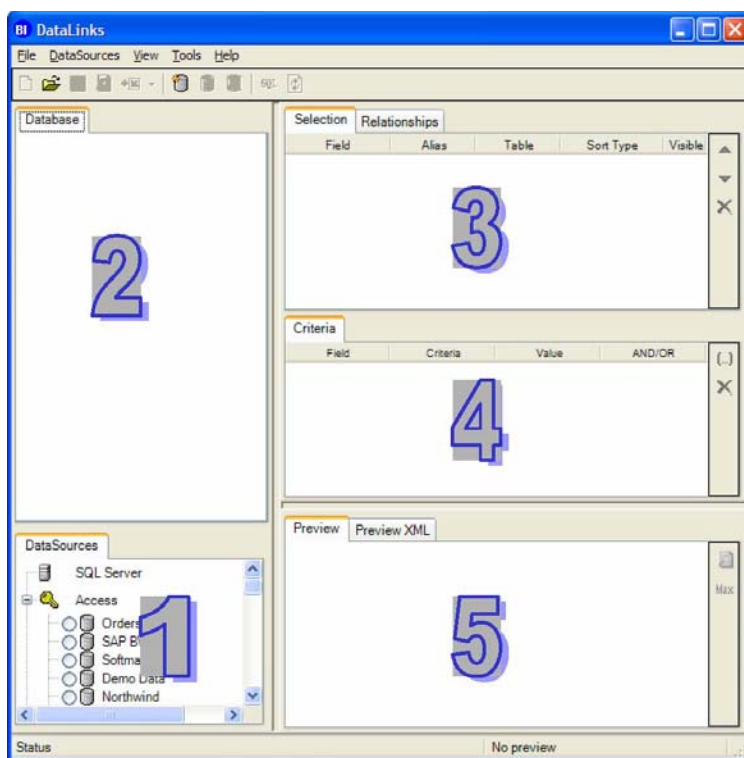
Starting in the lower left corner and proceeding clockwise, you find the DataSource pane (1) Where the sources of data that you point DataLinks to show up. Once you have set up a datasource and clicked on the radio button next to it in the DataSource pane, the Database pane

(2) Shows the table and column structure of the data. You then build your query by dragging and dropping entire tables or individual columns from your datasource into the Selection Pane

(3). If you want to apply any filters to your query, drag individual columns from the Database or the Selection Panes to the Criteria Pane

(4). At any time that you are building your query you can preview the results in the Preview Pane

(5) by selecting File > Preview Query Results from the main menu in DataLinks.



Configuring a DataSource

Each datasource type (SQL Server, Oracle, Access, DB2, CSV, Excel, Generic ODBC) has a slightly different configuration screen. Sources that consist of individual files like Access databases, Excel workbooks or CSV files require only that you have access to and know the name and location of the file you wish to point to.

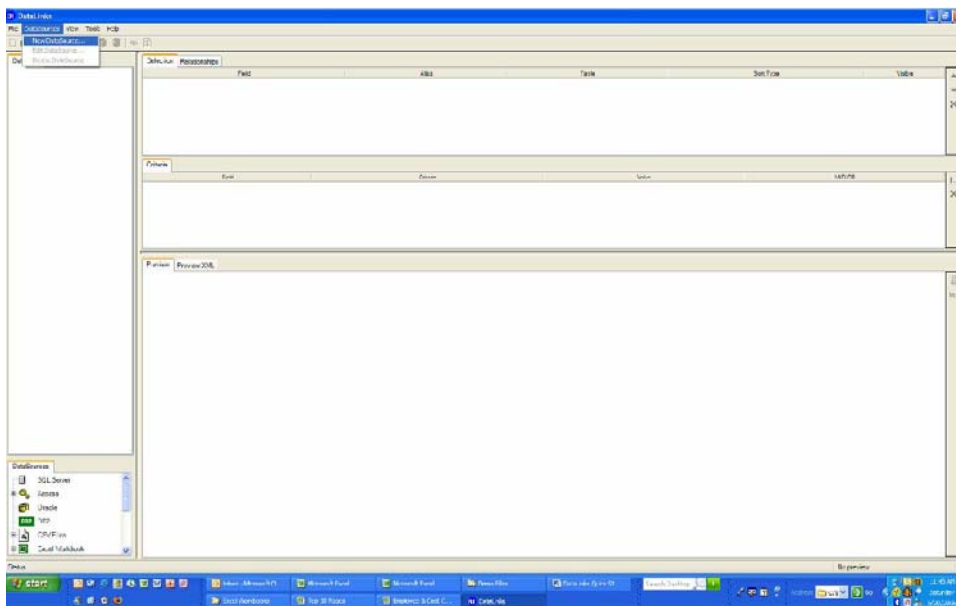
To connect to other relational databases like SQL Server, Oracle, DB2, etc. all you need to know is the name of the server on the network on which the database resides and the name of the database. You do not need to have any admin, reporting or other components of the database installed in order to connect to data in these formats using DataLinks. What this means is that you have access to *ALL* your data from the DataLinks user interface. If you want to grab some data from a SQL server datasource you click on

the radio button next to that datasource in DataLinks and immediately you see and can query and export your SQL data. Click on a datasource pointing to a DB2 database stored on another server and your DB2 data is available for you to query. No more starting up a SQL Server admin tool and then a DB2 admin tool just to get at two different sets of data.

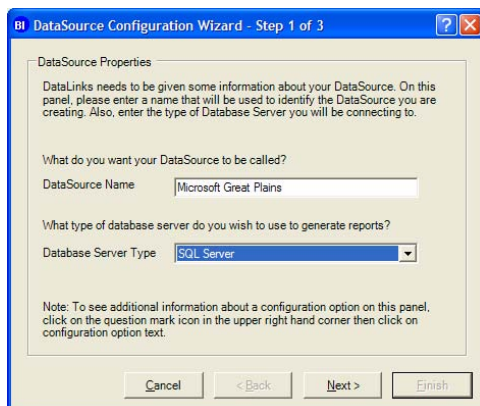
The following example illustrates how to connect to a SQL server datasource. Follow the connection wizard to connect to other datasources.

Step 1

Open DataLinks and click on DataSources > New DataSource on the main menu



Enter a friendly name for your datasource in the DataSource Name text box. This is the name that DataLinks will display in the DataSource pane so be sure it properly identifies the datasource to you. Select SQL Server from the drop down list to identify the file type as a SQL Server database. Click Next to continue.



Step 2 -Select Use the Data Link wizard to generate a connection string and click Next to continue.



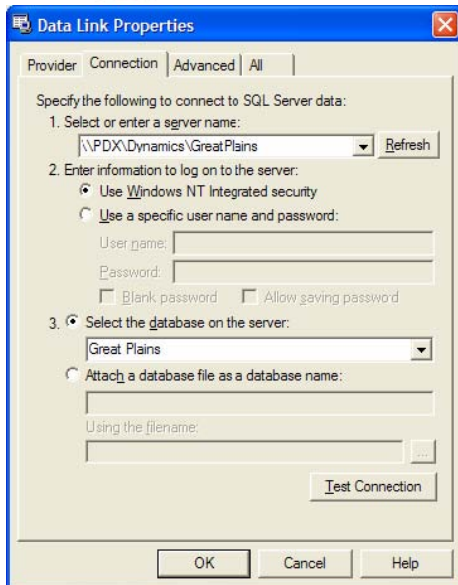
Click on Launch Data Link wizard to create the connection string that DataLinks needs to connect to your SQL Server database files.



Select or enter a server name in the text box. If you click on the drop down list DataLinks will make an effort to scour the network for possible services with a SQL Server database on it. Depending on the network configuration the server you want may not be listed. If it is not, you can enter the name manually.

Most IT departments allow for a single login and thus your windows credentials are sufficient to log you in to a database to which you have been granted access. If this is how your network security is set up, click the radio button to the left of Use Windows NT Integrated security. If you are required to login separately, enter the login information here so you do not need to login every time you select this datasource in DataLinks.

Select the database name from the drop down list or enter it here if you know it. Click Test Connection to see if the information you have entered is correct. If an error is returned, check your settings and make the changes necessary. If you get a Test Connection OK message, click OK to continue to the next step.



Step 3

Click finish and DataLinks will store all the information it needs to connect to this datasource again at the click of your mouse.

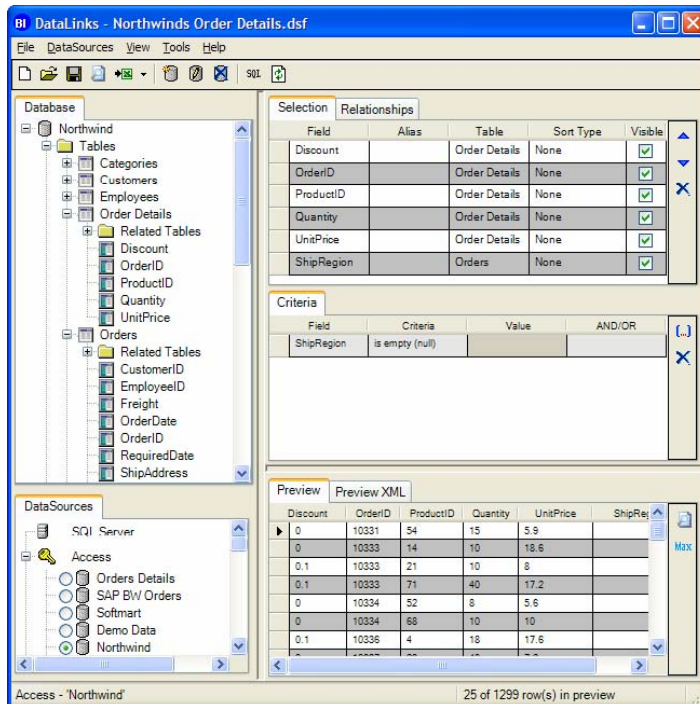


You will now see your new SQL Server datasource in the lower left or DataSource pane of DataLinks. Click on the radio button next to the new datasource and your SQL Server data will now show up in the Database pane of DataLinks as separate tables and views.

Building, Running and Saving a DataLinks Query

After you have configured a datasource you can click on the radio button next to it in the DataSource pane and your data will show up in the Database pane as Tables and Views (or Queries). You can drill down into the Tables and Views to expose the columns or fields in each. If your datasource has relationships that are properly declared in it, DataLinks will show those related tables in the database pane. (Note: Refer to the DataLinks User

Guide for more information on how to create your own relationships between tables within DataLinks.)



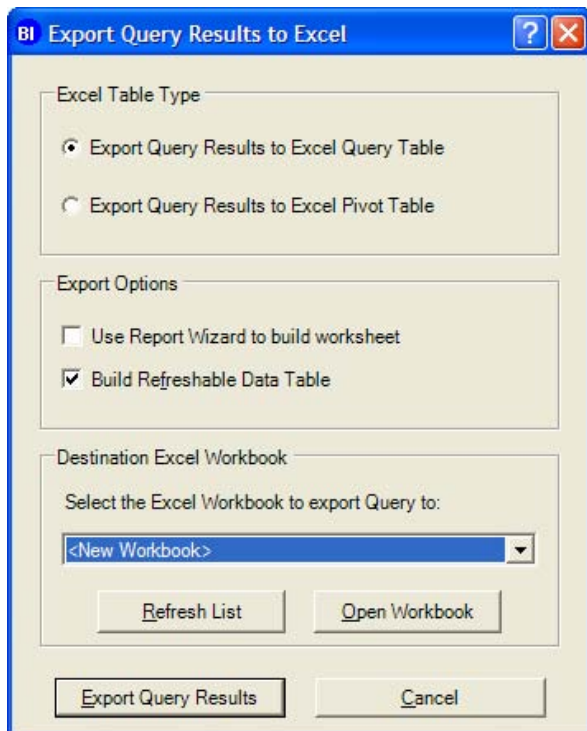
Remember the easy three step process for building your query as illustrated above:

1. Select your datasource in the DataSources Pane by clicking on the radio button next to the datasource you want to query.
2. In the Database Pane drill down into the database to view the tables and fields you want to include in your query. Drag and drop the fields or an entire table from the Database pane into the Selection Pane. (Note: if you select data from more than one table you must be sure that a relationship exists between the tables in the database itself or you must create a relationship of DataLinks will be unable to return a meaningful dataset from the datasource. See the DataLinks User Guide for more information on how to create relationships using DataLinks.)
3. To apply a filter to your data drag the field you wish to filter on into the Criteria Pane and select the criteria and value you wish to filter on. (Note: If you do not know the values in the datasource you can click on the icon in right side of the value box in the criteria pane to have DataLinks provide you with a drop down list of valid values). At any time you can preview the results of your query by selecting File > Preview Query Results from the main DataLinks menu. To save your query, simply click on File > Save Query and choose a folder and filename to save it for future use. (Note: these saved query files can be shared with other DataLinks users to ensure the exact same query gets run each time.)

Exporting Your Report to Excel

When you are satisfied with the results of your query in DataLinks, you can export the resulting dataset into Excel via a refreshable connection. (Note: You can also choose to export the data in XML or CSV format if you want to use a presentation program other than Excel to view the data.)

Select File > Export Query Results > Export Query Results to Excel. DataLinks will bring up the following screen.



If the resulting dataset is less than the maximum number of rows in an Excel workbook (currently 65,535 rows) you will have the option of exporting your report in an Excel Query Table (i.e., raw data) or an Excel Pivot Table (i.e., summary data) formats. If, on the other hand you are working with large datasets that exceed the row count in Excel, the Excel Query Table option will be grayed out, however the Excel Pivot Table option will still be available. This example assumes the data is exported in Excel Query Table format.

Select the Excel workbook you wish to export the data to and click Export Query Results to generate the report in Excel. (Note: if you choose to export the report to an open Excel workbook, the report will be generated in Excel wherever the cursor is. Be sure and check that the cursor is in the right place in your Excel workbook before clicking on the Export Query Results button.)



	A	B	C	D	E	F	G	H	I	J	K
1	Discount	OrderID	ProductID	Quantity	UnitPrice	ShipRegion					
2	0.00%	10331	54	15	5.9						
3	0.00%	10333	14	10	18.6						
4	10.00%	10333	21	10	8						
5	10.00%	10333	71	40	17.2						
6	0.00%	10334	52	8	5.6						
7	0.00%	10334	68	10	10						
8	10.00%	10336	4	18	17.6						
9	0.00%	10337	23	40	7.2						
10	0.00%	10337	26	24	24.9						
11	0.00%	10337	36	20	15.2						
12	0.00%	10337	37	28	20.8						
13	0.00%	10337	72	25	27.8						
14	5.00%	10340	18	20	50						
15	5.00%	10340	41	12	7.7						
16	5.00%	10340	43	40	36.8						
17	0.00%	10341	33	8	2						
18	15.00%	10341	59	9	44						
19	20.00%	10342	2	24	15.2						
20	20.00%	10342	31	56	10						
21	20.00%	10342	36	40	15.2						
22	20.00%	10342	55	40	19.2						
23	0.00%	10343	64	50	26.6						
24	5.00%	10343	68	4	10						
25	0.00%	10343	76	15	14.4						
26	0.00%	10345	8	70	32						
27	0.00%	10345	19	80	7.3						

DataLinks sends the query to the datasource and pushes the resulting dataset out to Excel in a refreshable connection. What this means is that when you want to refresh the data in your Excel report against the datasource, you simply click somewhere in your report in Excel and select Data > Refresh Data from the main Excel menu. The query is then sent back to the datasource and the new dataset is reflected in your report.

For More Information:

Website: <http://www.BusinessIntelligenceLLC.com>

Technical Support: Support@BusinessIntelligenceLLC.com

Sales: Sales@BusinessIntelligenceLLC.com

Suggestions: Support@BusinessIntelligenceLLC.com

Telephone: (610) 971-4067