

# DataSelf ETL Short Installation Guide – v 1402

## 1. General Notes:

- **This guide lists the steps to installing the DataSelf BI on a standalone computer.** Be sure you have logged to Windows using an Administrator logon to perform this installation. This Admin logon must have reading rights to the source database. Other users can access DataSelf BI database structures via security settings in Set up Windows and MS SQL Server.

## 2. System Requirements

- Minimum hardware: Pentium class processor, 2GB of RAM, 20GB of free disk space.
- Windows 2003 or Windows 2008, 32-bits or 64-bits, latest service packs applied.
- If you already have MS SQL Server 2008 R2, 32-bits or 64-bits, Standard or Enterprise Edition:
  - Apply the latest service pack to MS SQL Server.
  - Apply the latest service pack to MS Analysis Services (see step 4 below to install MS AS) (if installed).



## 3. DataSelf BI Downloads

- **Download and save** your DataSelf BI files onto your local hard drive. Depending on what you purchased from DataSelf, you may have the following files to download (see DataSelf download links if passwords are required):
  - MS SQL Server;
  - DataSelf ETL engine;
  - DataSelf ETL engine upgrade;
  - DataSelf BI templates – the templates are specific for each ERP/CRM system and version;
  - DSA Desktop;
  - DSA Server


## 4. MS SQL Server and MS Analysis Services

- For MS SQL and AS **2008 R2** Installation: [www.dataself.com/files/docs/DsBi\\_MsSqlServer2008R2Installation1103.pdf](http://www.dataself.com/files/docs/DsBi_MsSqlServer2008R2Installation1103.pdf)


## 5. Installing DataSelf ETL

- Run the downloaded file for the DataSelf ETL engine (ex.:  DsBi\_d12\_Plain\_2008.000.32a.exe ). This will create a new folder on your local HD (ex.:  DsBi\_d12\_Plain\_2008.000.32a ).
- From the new folder, run **“setup.exe”**. **IMPORTANT procedure for Win 2008 R2: Run all applications** described in this document using: **right-click** application and select **“Run as administrator”**.
- **Follow the prompts** to finalize the DataSelf ETL installation. At the end of the process, **close and/or cancel all** DataSelf ETL prompts.

## 6. Upgrading DataSelf ETL

- **Copy the DataSelf ETL engine upgrade .exe file** (ex.:  DsEtUpg2010.001.03.exe ) into the **“DataSelf ETL”** folder (usually at \Program Files (x86)\DataSelf\DataSelf ETL).
- **Run the upgrade .exe file** and click **Install**. You may not see any message, but the DataSelf.exe file date will be newer.
- **Start “DataSelf ETL”** by running (as Administrator for Windows 2008 and up) **“Start” > “All Programs” > “DataSelf” > “DataSelf BI”**. (Or run the DataSelf.exe in the DataSelf ETL folder you have open.) Wait until you see a DataSelf ETL prompt – this may take a minute or so, and the screen may flash a few times, and run a MetaDoctor utility.
- Click **Cancel** to the User Identification prompt.
- **IMPORTANT procedure for Win 2008 R2:** In the ..\DataSelf\Datasefl ETL folder, right-click **dataself.exe > Properties > Compatibility tab > Change Settings for All Users** button, check **Run this program as an administrator**, click **Ok**. Repeat this procedure for ..\DataSelf ETL\Library\dsrefresh.exe.

## 7. Installing the DataSelf BI Templates

- **Copy the downloaded DataSelf BI template .exe file** (ex.:  DsBi\_e01\_ERPname.exe ) into the DataSelf ETL **Project** folder (usually at \Program Files (x86)\DataSelf\DataSelf ETL\Project).
- **Run the DataSelf BI template .exe file** and click **Install**. This step will extract the template files in their own folder.
- Delete the **DataSelf BI template .exe** and the **DDC** folder.

## 8. Installing the SQL Data Warehouse

Restore the SQL database from the file “..\DataSelf ETL\Project\ProjectName\Backup\DwXXXX.bak”, and restore to the name from the table below. Detailed instructions follow:

- Open “Start” > “All Programs” > “Microsoft SQL Server” > “SQL Server Management Studio”.
- Connect to “Server Type” = “Database Engine”.
- Click “Databases”, and right-click and select “Restore Database”.
- Name the data warehouse database per this list:

• Source Database	• Data Warehouse Name	•	• Source Database	• Data Warehouse Name
• MS Dynamics GP	• DwDynamicsGP	•	• Sage 500	• DwSage500
• MS Dynamics NAV	• DwDynamicsNAV	•	• Sage Pro	• DwSagePro
• Sage 300	• DwSage300	•	• Sage PFW	• DwSagePfw
• SageCRM	• DwSageCRM	•	• Sage SalesLogix	• DwSalesLgx
• Sage 100	• DwSage100	•	• SAP Business One	• DwSapBiz1


- Select “From Device”, click the “...” button, click “Add”.
- Select “..\DataSelf ETL\Project\ProjectName\Backup\DwXXXX.bak”, click “Ok”, “Ok”.
- Check the “Restore” checkbox.
- Select “Options” on the left pane and check “Overwrite the existing database”. Click “Ok”.
- Hint: Copy the data warehouse name and Paste it into a temporary text file, for use in subsequent steps.

## 9. DataSelf ETL Registration

You may complete this at any time. The unregistered ETL will stop allowing refreshes 60 days after installation.

- Download Registration file and save in Dataself ETL folder.
- **Optional Product Registration procedure:-** From within the ETL, You may do this at any time: click **Tools > Registration** and complete the wizard. You will need to know the registration code.

## 10. Upgrading Templates

- On the **DataSelf ETL root directory** (usually at \Program Files (x86)\DataSelf\DataSelf ETL), **run again the DataSelf ETL engine upgrade .exe** file (ex.:  [DsEtUpp2010.001.03.exe](#) )
- **Run the upgrade .exe** file and click **Install**.
- **Start** “DataSelf ETL” by running “**Start**” > “**All Programs**” > “**DataSelf**” > “**DataSelf BI**”. Wait until you see a DataSelf ETL prompt – this may take a minute or so, first the screen may flash a few times and the MetaDoctor will run.
- On the User Identification prompt, enter “**dba**” for user, “**dba**” for password, select your **Project** (ERP package name) (if prompted), you may **check** the Remember User and Password box and click **Ok**.
- Click **Ok** when you receive a connection failure message.

## 11. DataSelf ETL Initialization

- At this point, you should see a SQL Server Connection window in the ETL. If you do not see the message, from within the ETL go to **Tools > SQL Server Connection**. Please specify the following parameters for the target data warehouse:
  - “**SQL Server Name**”: Set it as “**(local)**” or enter the SQL instance name.
  - “**Authentication Mode**”: Leave it as “**Windows**”.
  - “**Database name**”: This field already comes populated with a default data warehouse name. However, you may need to change it to match the database you installed in Step 8.
  - “**Reconstruct data warehouse table structures and indexes**”: **Uncheck** this box.
  - “**Restore the DataSelf BI data warehouse definition**”: Leave Unchecked.
  - Click “**Test Connection**”. The test must be successful.

Click “**Finish**”. Upon clicking “Finish”, the ETL will connect to SQL. If you accidentally checked the “Reconstruct the data warehouse table structures and indexes”, this procedure may take several minutes to complete. Just wait until it finishes and a Browse Table window appears.

- The upper left corner of the ETL should now display the correct Project, SQL instance, and Database.

- From the Browse Table window within the ETL, you should be able to click on any table and have a window open displaying the table's column names and its data. This is the SQL database data that you previously installed.
- Maximize the Browse Table window to see the Data Source Name column. Look for connections named DS\_XXX and DSDW\_XXXX. You will now create these in the following Step.

## 12. Setting up Data Connections

1. Download and install the 32-bit version of the Excel and Access proper driver: <http://www.microsoft.com/en-us/download/confirmation.aspx?id=13255> . **NOTE:** Be sure to download the 32 bit driver , not the 64-bit version.

Now you will create connections to the data source(s) and to the data warehouse itself.

For connections to **SQL, Excel, or Access data sources**, use DataSelf ETL's internal DSN creator. See also [http://www.dataself.com/wiki/Import\\_Table\\_Wizard](http://www.dataself.com/wiki/Import_Table_Wizard)

Create the connection to the data warehouse itself:

1. In the **Browse Table** dialog, highlight a small simple table such as AR Customer.
2. **Control-I** to open the Import Wizard for this table.
3. **Back** to access the data sources list.
4. **Add** to add a connection to the ETL's SQL data warehouse that you installed in the previous step. Use the name from the Table #2 below (and as seen in the Browse Table dialog). Fill in the fields and **Save**. This connection will appear in the connection list.

Create the connection to source data:

5. For SQL, Access or Excel based external data sources, Click **Add** again, and fill in the fields to add a new data source to the Source Data. Use the Table #1 below for the name. **Save**.
6. **Cancel** out of the import wizard.

For **ODBC connections** to other data source types:

- **IMPORTANT for 64-bit OS:** Please use the ODBC Data Source Administrator from \Windows\SysWOW64\odbcad32.exe. Also, the ODBCs below should be **SYSTEM DSN's** (not User DSN).
- Set up a **System DSN** to the source database. Please use the left-hand table below to name it.
- For instructions on how to set up the ODBCs, please see [www.dataself.com/files/docs/DsBi\\_ODBCs0907.pdf](http://www.dataself.com/files/docs/DsBi_ODBCs0907.pdf).

1. ODBC to <u>Source Database</u>	
Source Database	ODBC Name
MS Dynamics GP	DS_DYNGP
MS Dynamics NAV	DS_DYNNAV
Sage Accpac	DS_Sage300
SageCRM	DS_CRM
Sage 100	DS_Sage100
Sage 500	DS_Sage500
Sage PRO	DS_SAGEPRO
Sage PFW	DS_SAGEPFW
Sage SalesLogix	DS_SALESLGX
SAP Business One	DS_BIZONE

2. ODBC to SQL Server <u>Data Warehouse</u>	
Data Warehouse Name	ODBC Name
DwDynamicsGP	DSDW_DYNGP
DwDynamicsNAV	DSDW_DYNNAV
DwSage300	DSDW_SAGE300
DwSageCRM	DSDW_CRM
DwSage100	DSDW_SAGE100
DwSage500	DSDW_SAGE500
DwSagePro	DSDW_SAGEPRO
DwSagePfw	DSDW_SAGEPFW
<b>DwSalesLgx</b>	<b>DSDW_SALESLGX</b>
DwSapBiz1	DSDWBIZONE

## 13. DataSelf ETL Table Import Testing

Test the connections to **Source Data**:



1. In the Browse Table dialog, highlight (select) a small table that connects to the outside data source.
2. Control-R to refresh it.
3. After it completes (it may take a moment to recalculate formulas and recreate indices), click on the highlighted table name. You should see the data window open, but with new data.

Test the connections to the **Data Warehouse**:

1. Select the SYSTEM\_RefreshHistory table, and refresh it as above. The process should not report any errors.

You may also check the ETL's log file, especially if there were errors during the import: **..\DataSelf\DataSelf ETL\LOG ProjName.txt**.

## 14. DataSelf BI Full Refresh – Manual and Automatic



- Open DataSelf ETL, click the **Refresh Wizard icon**  on the icon bar across the top of the ETL, and click **Properties**.
- **Set the automatic refresh properties** on the Refresh Wizard – MS SQL Server Job Properties window. Click **Apply, close the wizard**.
- In the **Tools** menu > **Refresh Report Email Configuration**, add the email address and subject. Change the Send... option to Always. You may wish to enter your own email first, and click the Test configuration account button.
- **Close DataSelf ETL**.
- This procedure creates a SQL Server Job to refresh DataSelf BI automatically. It also creates a Windows shortcut in the DataSelf ETL root folder – ex.:  DSRRefresh ProjectName.
- For testing purposes, at a time when you can pull data from the data source without affecting operations, double-click the Windows shortcut above to run a full DataSelf BI refresh. You may also run the SQL Job with the same name as the shortcut and monitor if the refresh runs successfully.

## 15. Installing DSA Analytics

Follow Tableau's instructions, and DataSelf standards:

[http://www.dataself.com/wiki/DSA\\_Desktop\\_and\\_Server\\_Installation](http://www.dataself.com/wiki/DSA_Desktop_and_Server_Installation)

## 16. OPTIONAL: Deploy the DataSelf BI Cube Database (via MS Visual Studio)

- **Open the Visual Studio (VS) Project:** Click the ETL's Visual Studio icon , on the Open Project window, **find** from the VS project from: .\DataSelf ETL\Project\ProjectName\VisualStudio\VSProjectName\VSProjectName.sln and click **Select**. This will launch Microsoft Visual Studio with the selected project.
- **Deploy the VS Project:** Skip this step if deploying VS project to the local MS AS default instance: On the Solution Explorer panel, **right-click DataSelf BI for ProjectName Proj** and select **Properties**. On the Property Pages, select **Deployment** on the left panel and edit the **Target > Server** box – if necessary, fill out the local server name and SQL instance: ex.: InstanceName. Click Ok.
- **Connect VS to Data Warehouse:** Skip this step if the DataSelf BI data warehouse is on the local MS SQL default instance: On the Solution Explorer panel, **double-click Data Sources > DataSelfBI\_DW.ds** and click **Edit** on the Data Source Designer window. Edit entries such as Server Name with the SQL server instance name: ex.: InstanceName and click Ok twice.
- **Process the database:** On the Solution Explorer panel, **right-click DataSelf BI for ProjectName Proj** and select **Process**. Click **Yes** to confirm the deployment and then click **Close** to the Process Database window.
- **Close Visual Studio and close DataSelf ETL**.
- Open DataSelf ETL, click the **Refresh Wizard icon**  on the icon's menu, and check the Refresh Cubes line to make it active. Save. Now the cubes will refresh as part of the DataSelf refresh process.

**You are done with the installation.** Please contact [support@dataself.com](mailto:support@dataself.com) for further help.