Southern Connecticut
State University

Brio: Install and Set Up via Teams

Introduction

This guide will show how to install and set up Brio via Microsoft Teams.

Prerequisites

1. Prior to initiating a Brio installation, a Brio account and proper permissions to access the reports they are required to run, must be in place for the user. If an account and/or permissions are needed, a work order must be submitted to helpdesk@southernct.edu.
2. Target system must be a **Windows**-based configuration. If a Macintosh system is the target, Parallels with a Windows installation must be performed. A separate work order should be created for each Macintosh machine requiring a Parallels installation, *separate* from the Brio Installation request and account access requests.
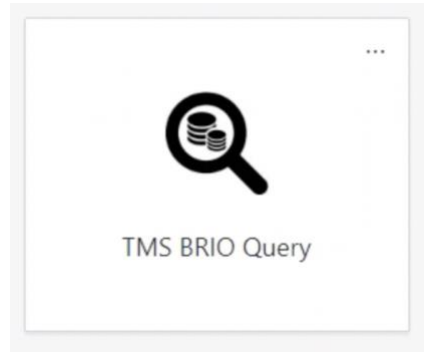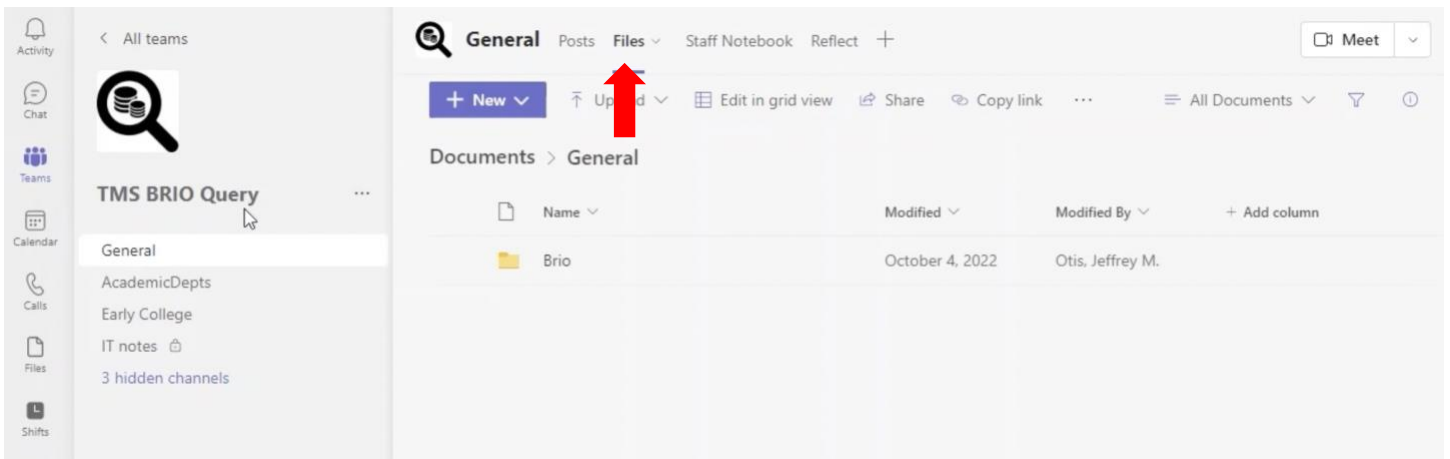
Installation

1. Open the Microsoft Teams application.
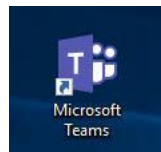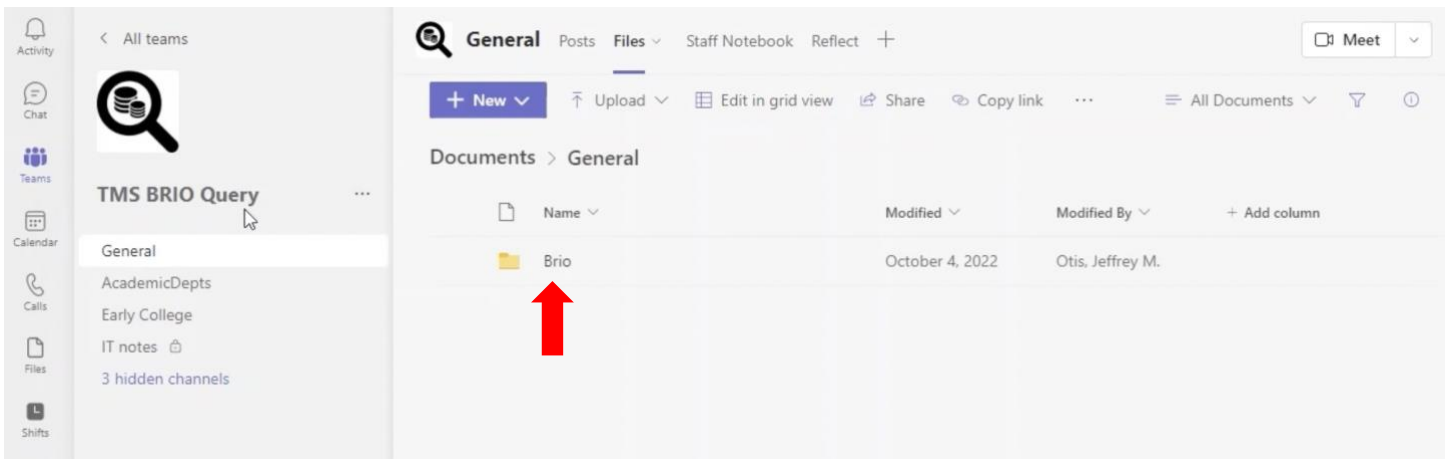

2. Select "Teams" from the left menu.
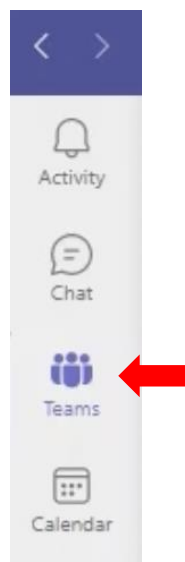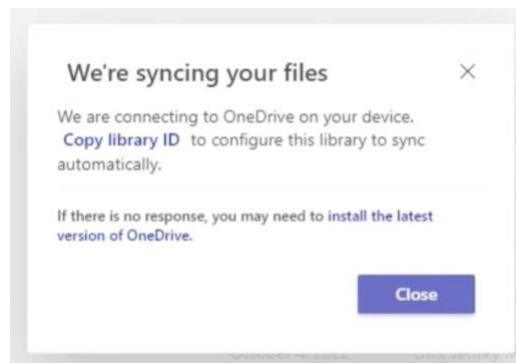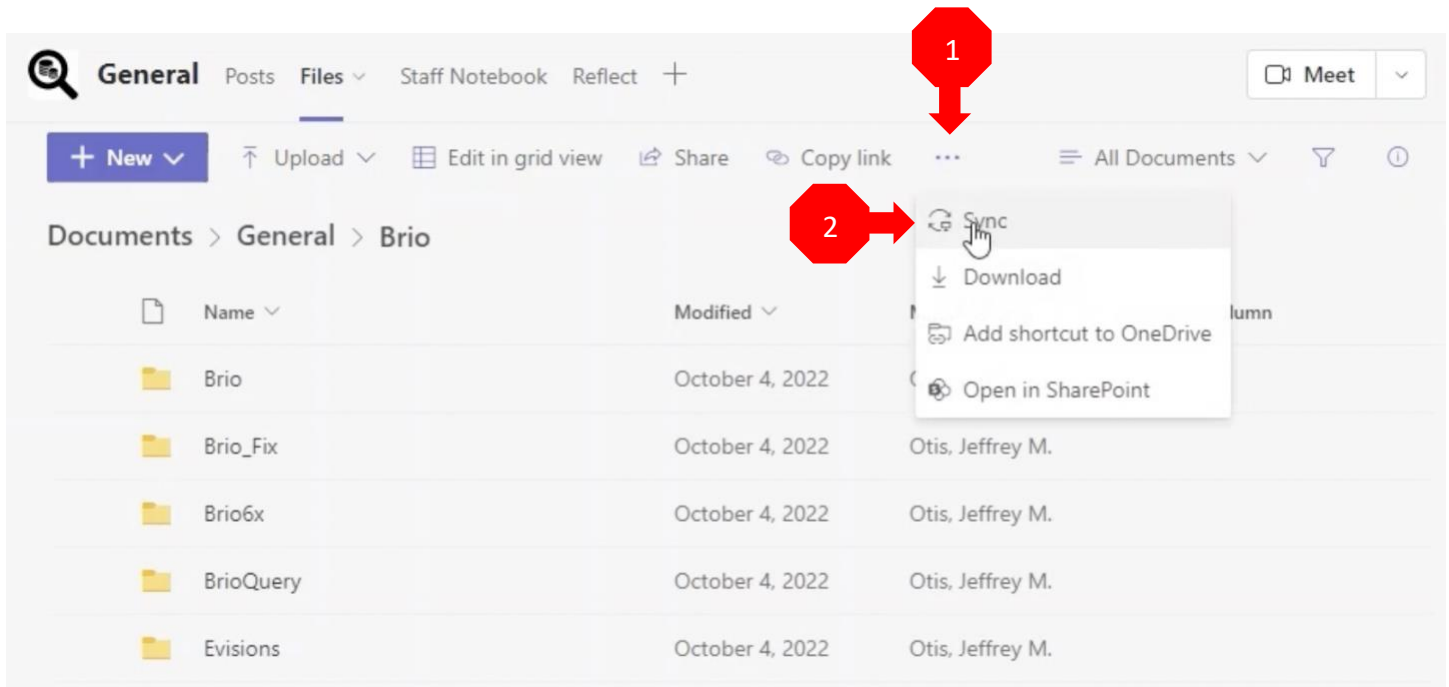
3. Select the "TMS BRIO Query" team.


4. Select "Files" from the top menu.

5. Select the "Brio" folder to open. *It is vital that you open this folder before moving to the next step.*

6. Select "Sync" from the top menu. If you are working in a smaller window, you may need to select "…" to view more options, then "Sync". This will begin to connect this Teams folder onto your computer's set of files.


7. Open your system files by either selecting a folder shortcut on your bottom toolbar, or opening the Start Menu and selecting "This PC".
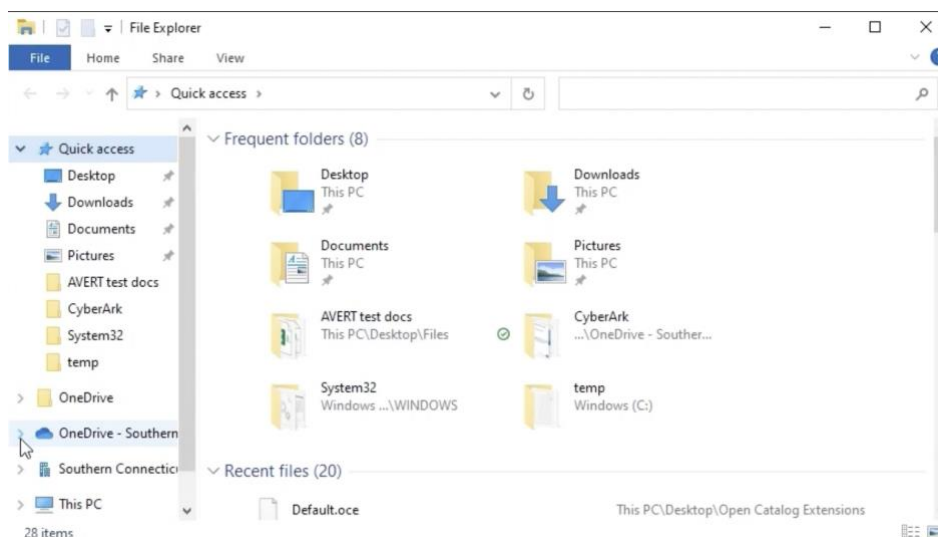
8. You will now see a "Southern Connecticut State University" connection on the left navigation window. Expanding this connection will provide the synced Brio folder. Right click on the "TMS Brio Query – Brio" folder and select "Always keep on this device". This will begin to download all files within the Brio folder and children folders onto your computer. *If you do not see this option, your OneDrive is set up to already keep the files on your device.*
This initial syncing process can take up to 10 hours to complete, depending on your internet connection. We advise that you resume other work, or leave the computer on to finish, in the meantime.
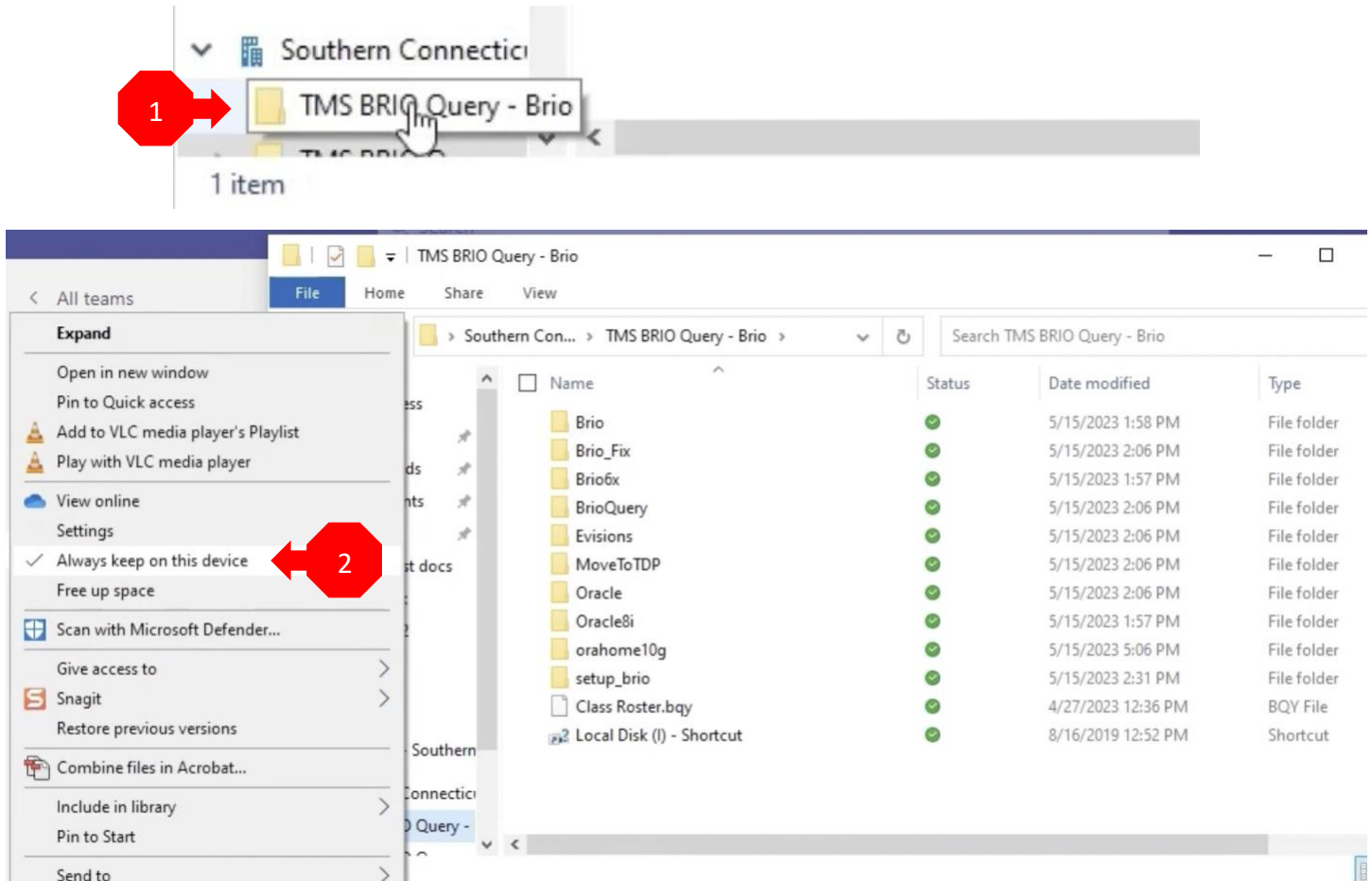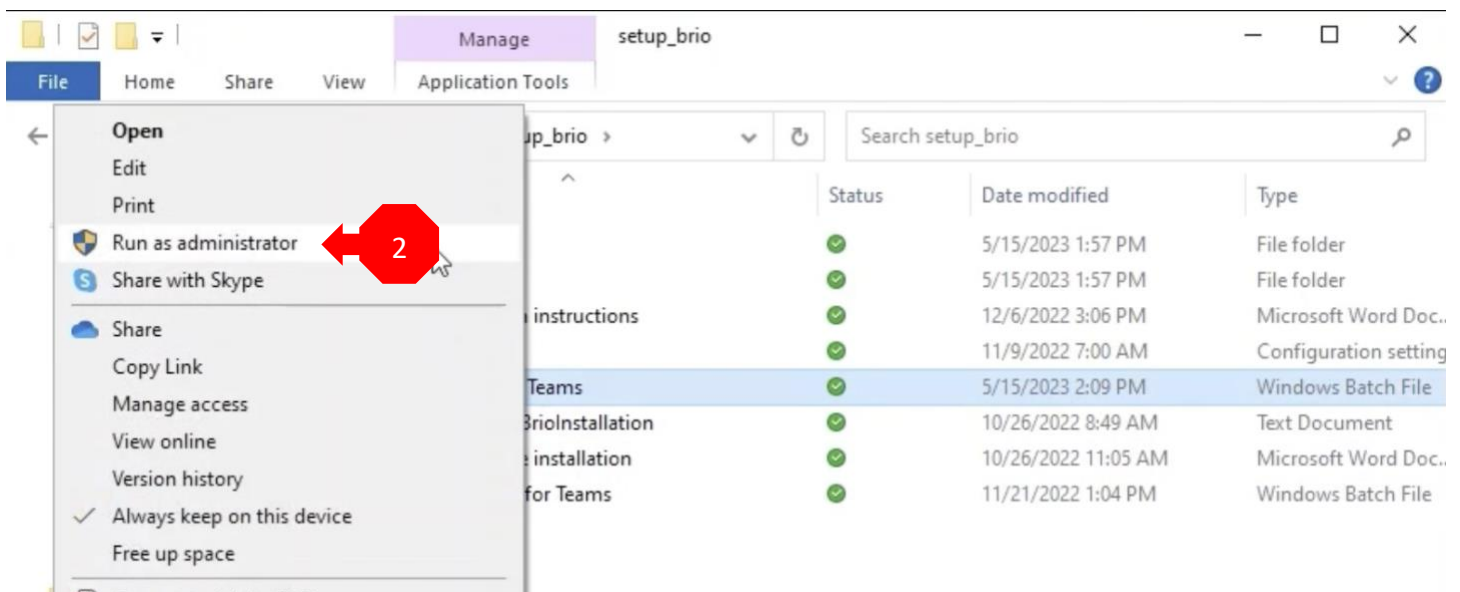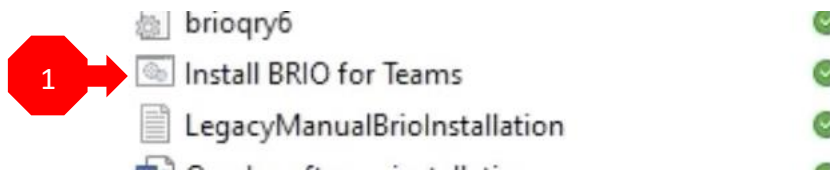

9. Once all folders have a green checkmark next to them, signaling they have finished syncing, you may proceed to the next step. **Do not proceed until finished syncing.**

4
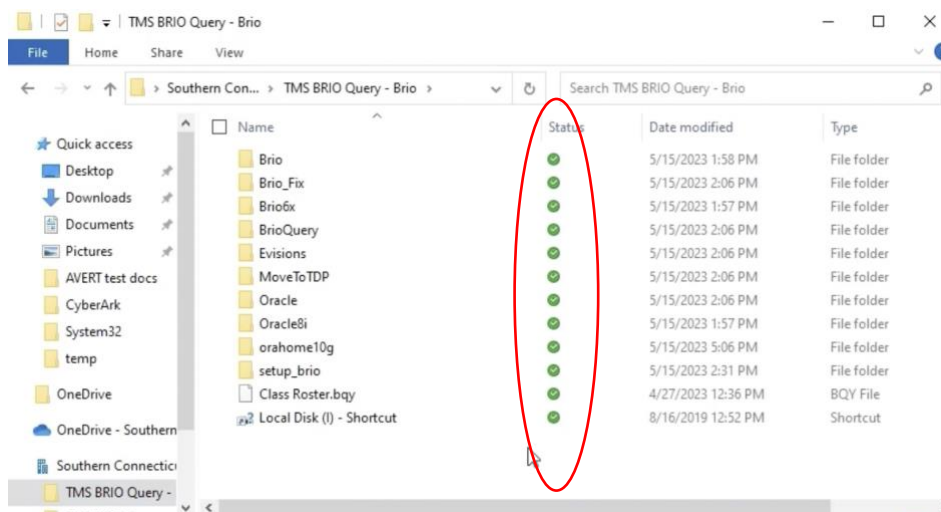
10. Open the "setup_brio" folder.

11. Right click on the "Install BRIO for Teams" file, and select "Run as administrator".

12. On your desktop, you will now see a "Run Brio" shortcut created. Open this shortcut and proceed to set up instructions below.

Syncing Additional Folders

Additional folders that are necessary for Brio functionality, formerly O: drive folders, will need to be synced to your computer in the same way the "BRIO" folder was in the previous section.

1. While within the "TMS BRIO Query" team, select the Channel from the left-hand menu in which you are looking to sync. If you do not see a Channel you are looking for, you may not have permissions to do so. A work order will need to be submitted to our Help Desk via helpdesk@southernct.edu.
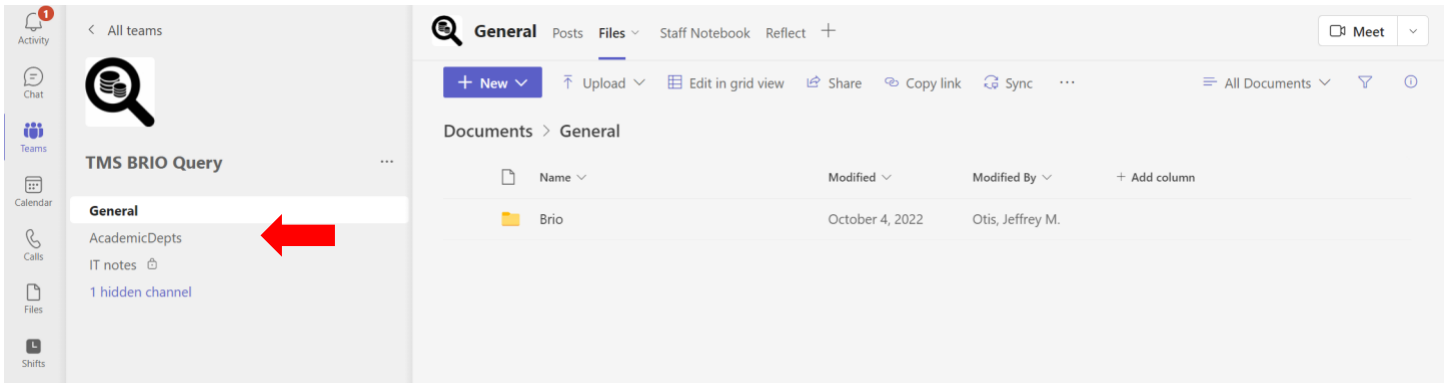

2. Select "Files", then "Sync".
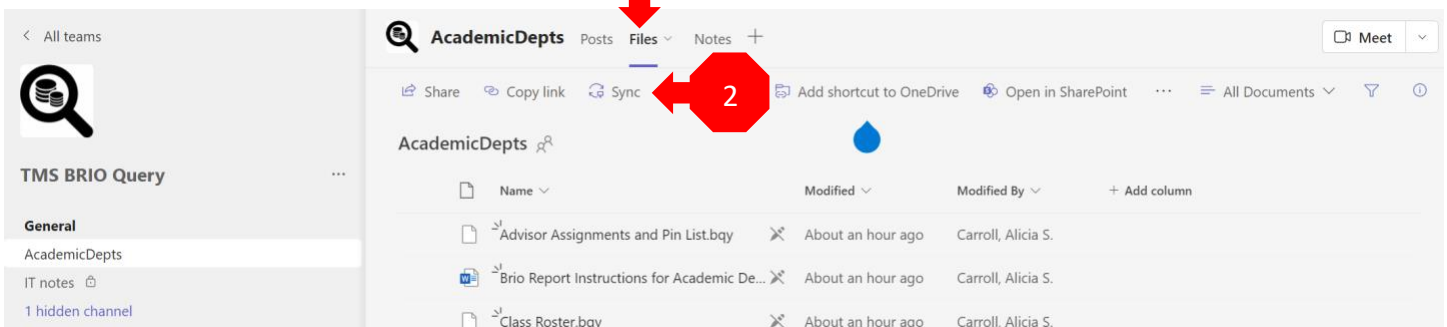
3. Open your system files again by either selecting a folder shortcut on your bottom toolbar, or opening the Start Menu and selecting "This PC".
4. Locate the new "TMS BRIO Query – " folder under "Southern Connecticut State University".
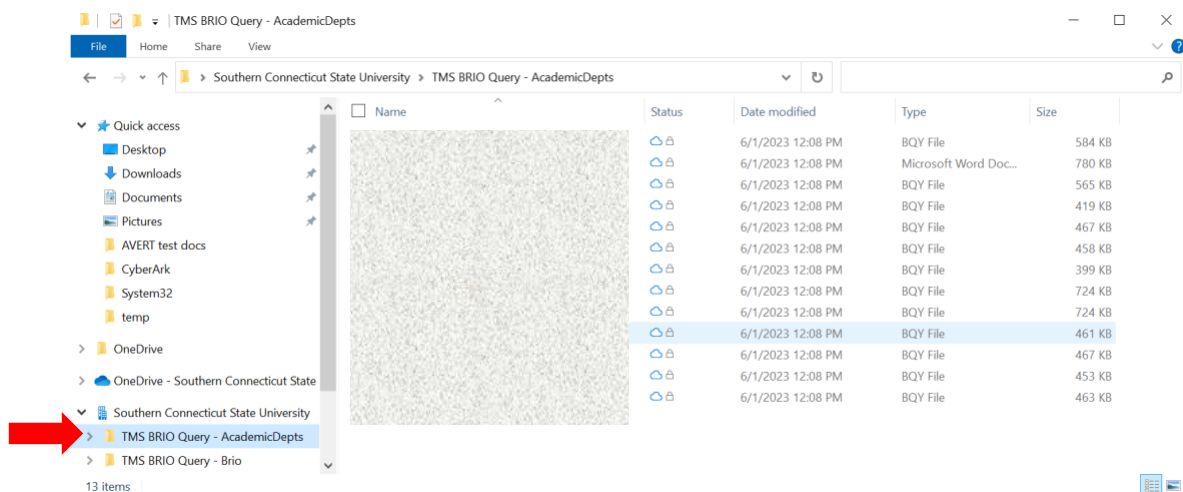
5. Right-click on the folder and select "Always keep on this device". This will begin to download all files within the Brio folder and children folders onto your computer. *If you do not see this option, your OneDrive is set up to already keep the files on your device.*
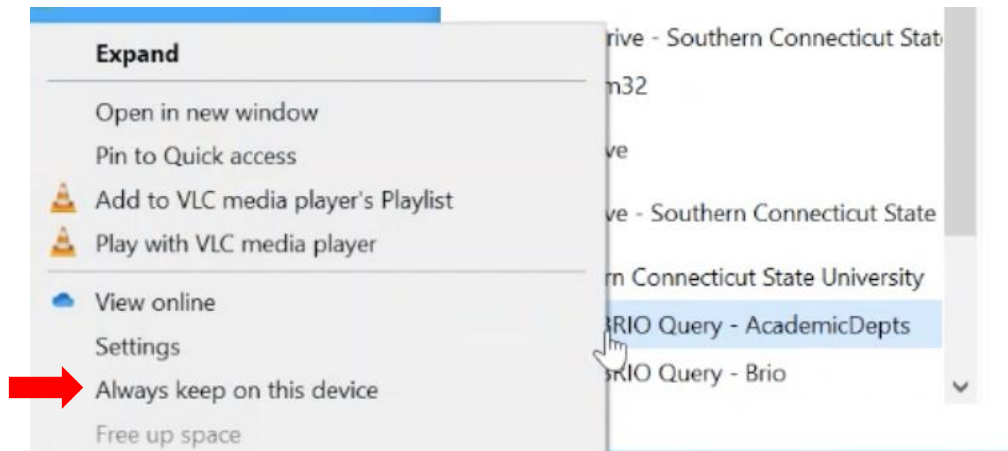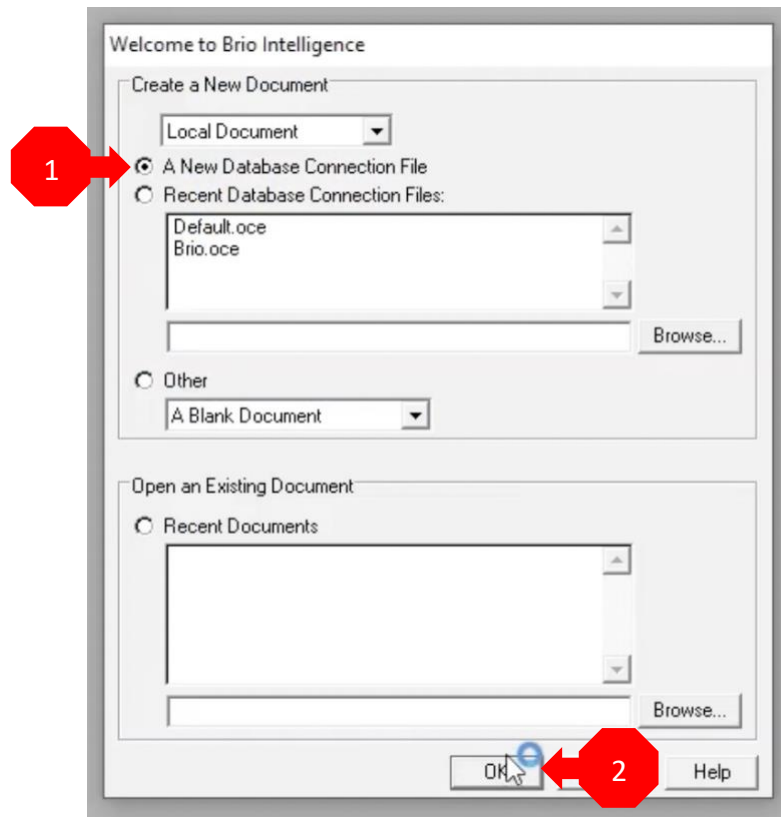

6. The sync is complete once all files/folders have a green checkmark next to the file name, under the "Status" column.
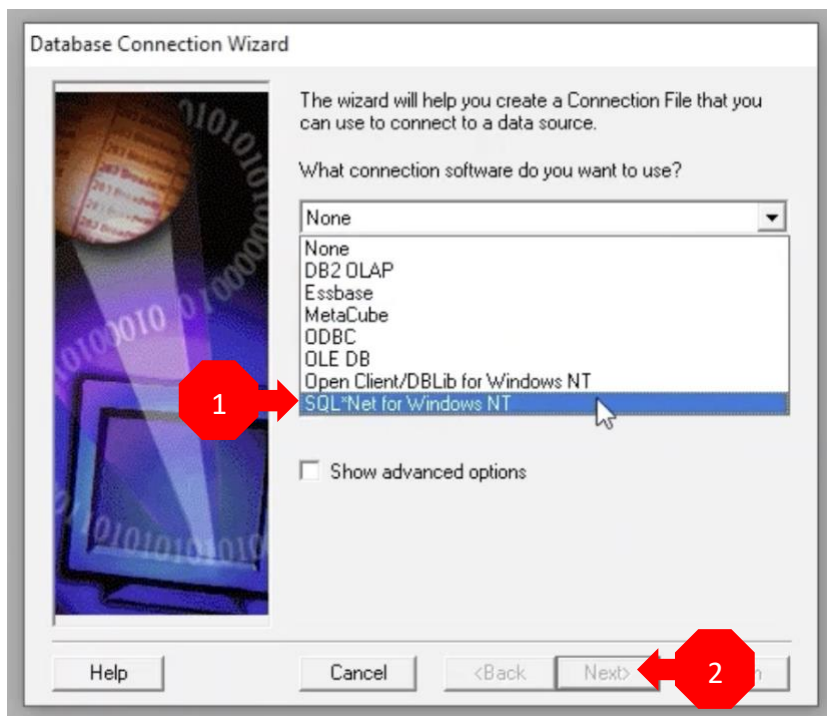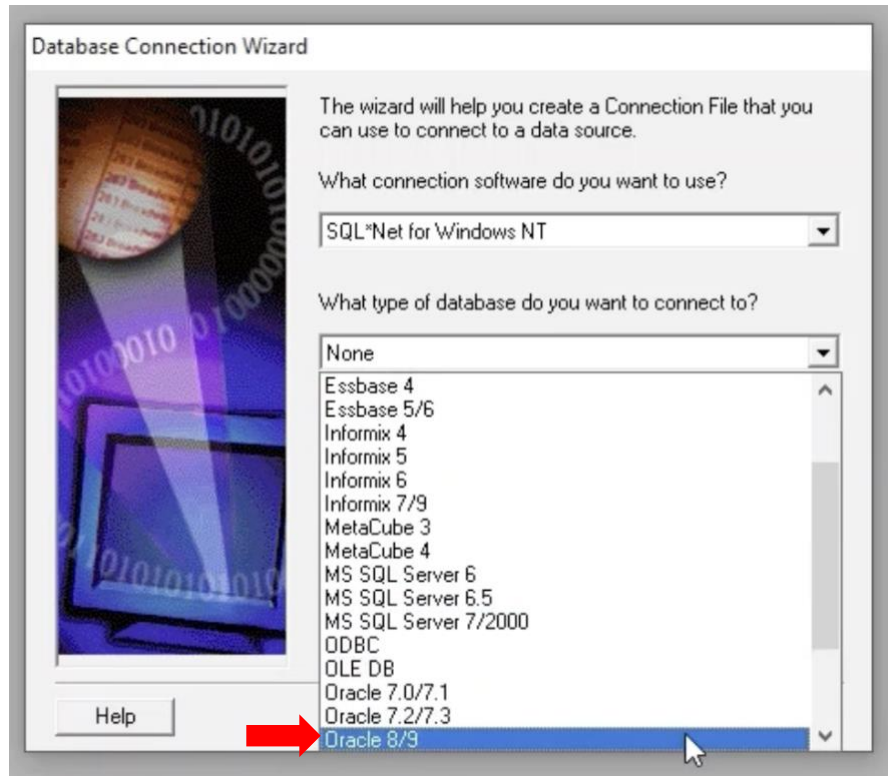
Set Up

1. After launching the "Run Brio" shortcut on your desktop, you will receive a Welcome window. Select "A New Database Connection File", then "OK".
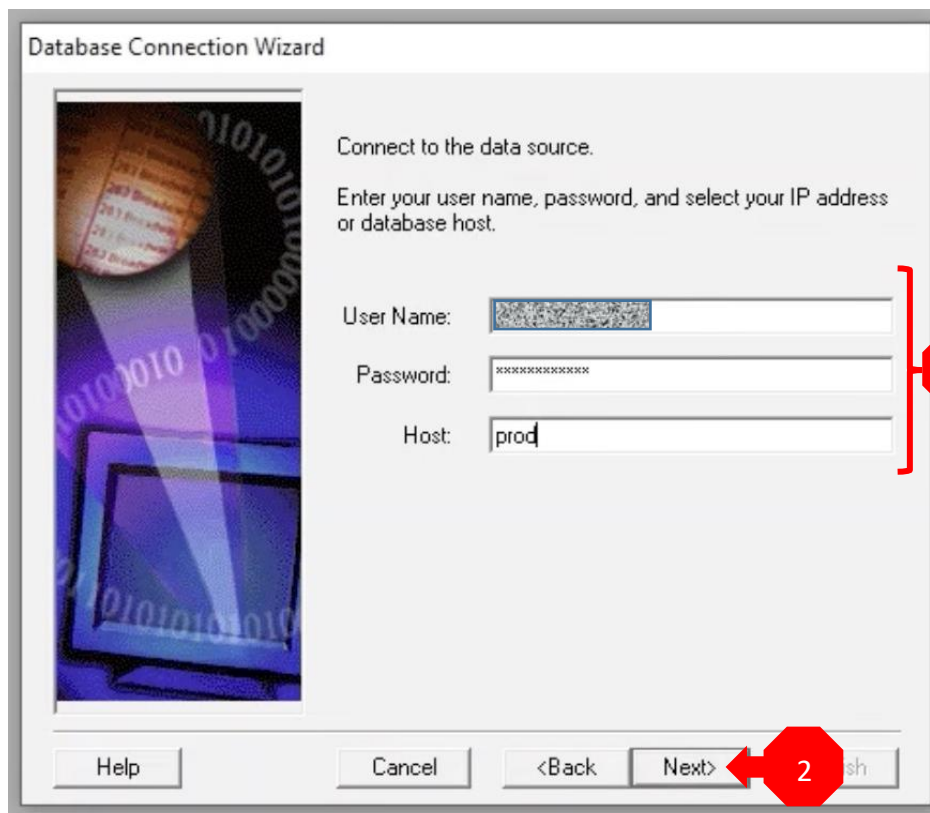

2. On the Database Connection Wizard window, select the first drop-down menu, then "SQL *Net for Windows NT".
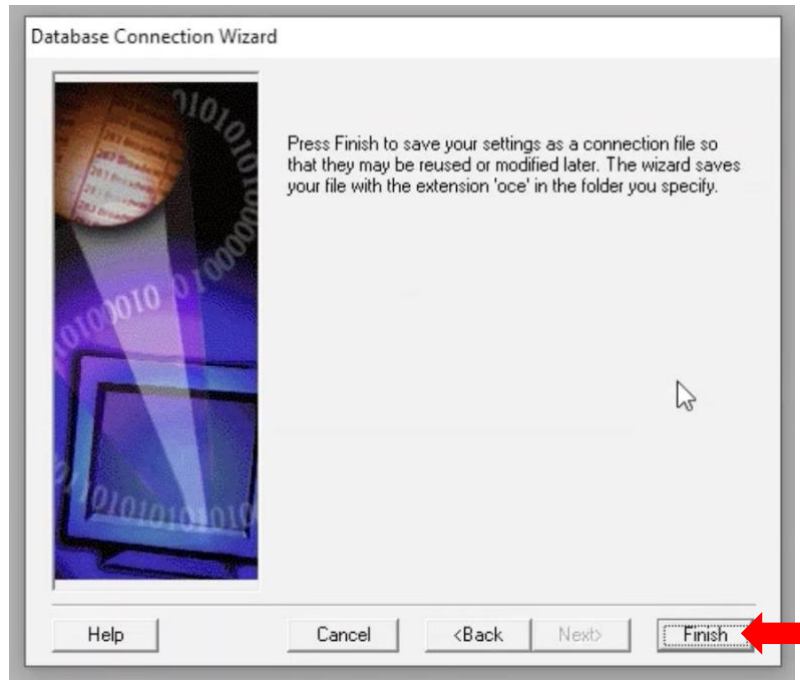
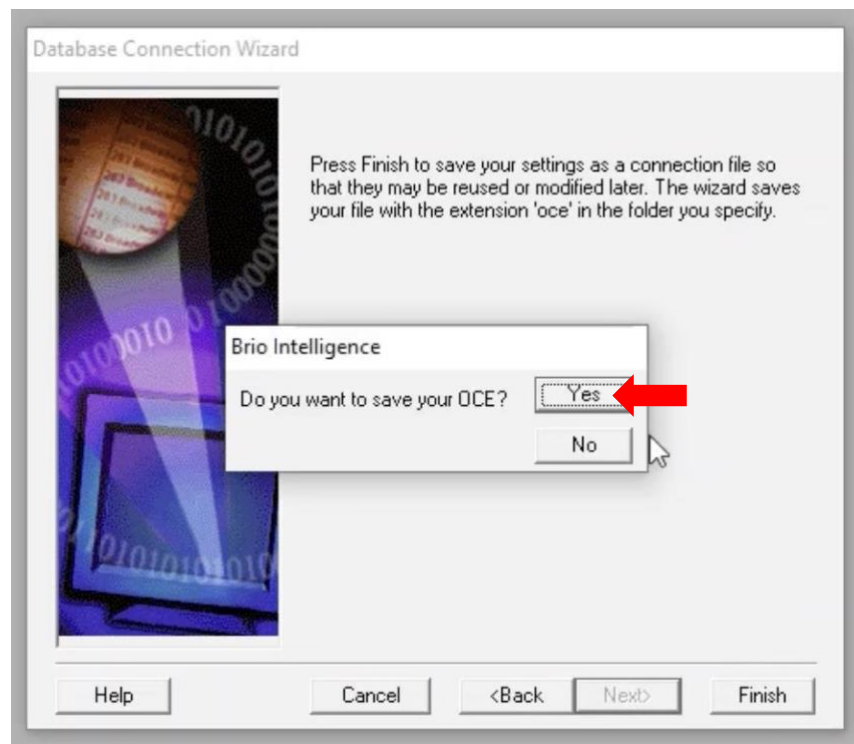3. Select the second drop-down menu, then "Oracle 8/9", and "Next".

4. Enter your Brio username, password, and host (such as prod, test, etc). Select "Next".
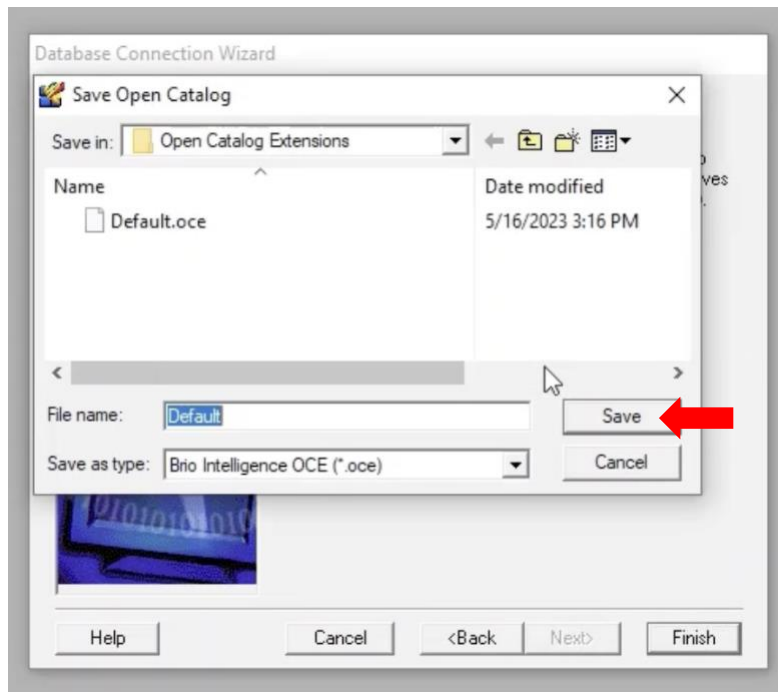
5. Select "Finish".

6. Select "Yes".

7. Select the "Save in:" drop-down menu and select where to save your .oce file. If you do not select an area to save the .oce file, and receive an error when selecting "Save", please ensure you are not attempting to save to the W: or O: drive.

8. Brio is now ready to use.