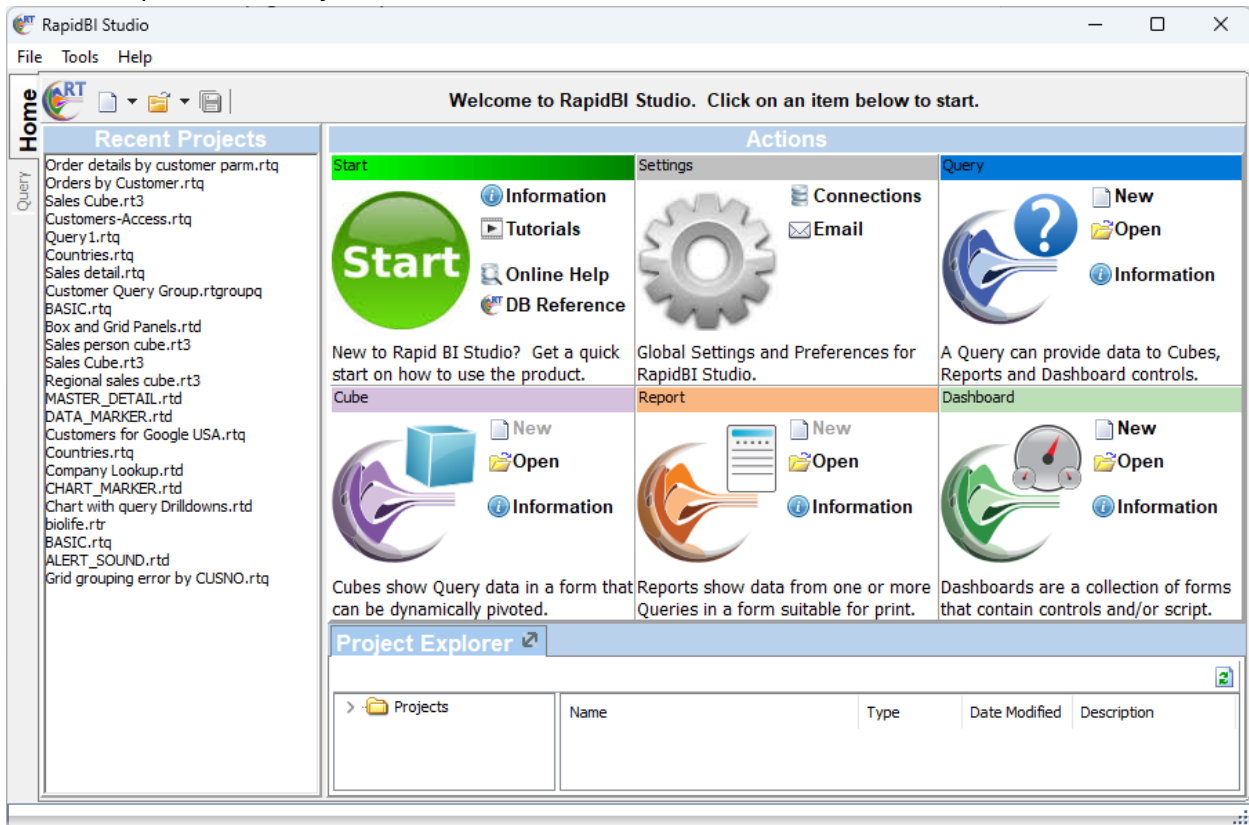# RapidBI Studio Quick Start

1. Visit the Resources page for most up-to-date information

2. Download and install the latest version of the RapidBI Studio setup

3. Watch the RapidBI Studio Overview video (~5 minutes)

4. Launch RapidBI Studio – you'll start on the **Home** screen:

The **Start** pane has links to video **Tutorials** and **Database References** for most databases, but remember that you can always click F1 for **Information** (local help) or use the Online Help:
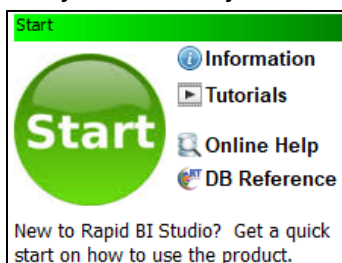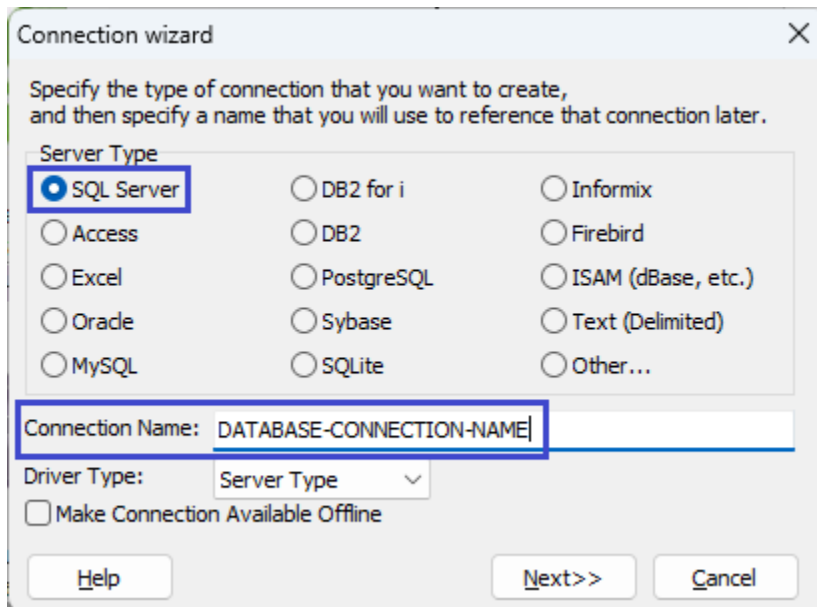
5. Once you've familiarized yourself with the Home screen, you'll probably want to [configure a connection](#) to your database; click **Connections** in the **Actions** pane:
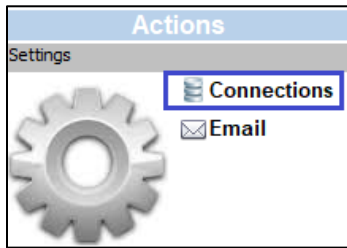
Click **Add**:
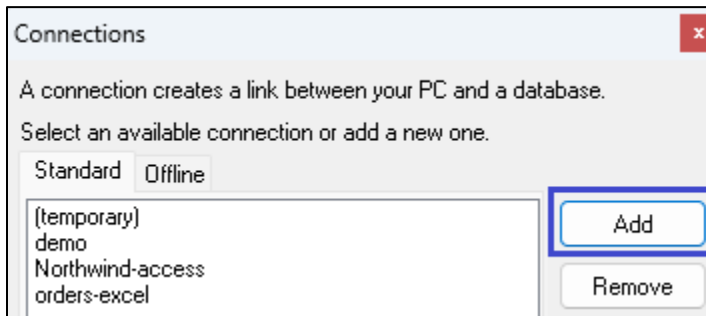
Select the type of database server (e.g. **SQL Server**) that you are connecting to, and specify a **Connection Name**:

6. Depending upon the type of database server that you are connecting to, fill in the appropriate values in the database connection wizard – at a minimum, you will probably need to specify a database server name or IP address and login information; once specified, click **Test Connection** to make sure that the connection succeeds, then click **OK** to save it:

Data Link Properties ✕

| Provider | **Connection** | Advanced | All |

Specify the following to connect to SQL Server data:
1. Select or enter a server name:

DATABASE-SERVER-NAME-OR-IP ˅ | Refresh

2. Enter information to log on to the server:
   ◉ Use Windows NT Integrated security
   ○ Use a specific user name and password:

   User name:
   Password:
   ☐ Blank password   ☐ Allow saving password

3. ◉ Select the database on the server:

DATABASE-NAME ˅

   ○ Attach a database file as a database name:

   Using the filename:

   [...]

   [Test Connection]

   [OK]   [Cancel]   [Help]

7. If your database is very large (you can skip this step if not) i.e. contains many schemas and many thousands of objects, or if you are using certain kinds of databases e.g. DB2 for i, then you might want to limit the amount of metadata returned – click **Properties**:
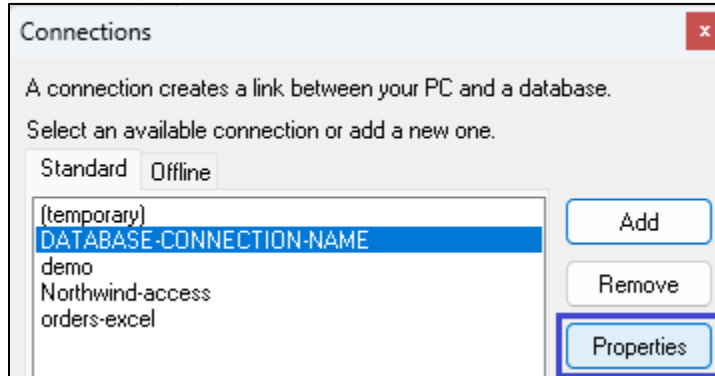

Drop-down the **Advanced** pane, switch to the **Filters** tab and use the **+** button to add **Inclusive** and/or **Exclusive** database object filters e.g. **Include** all tables that begin with "**QA**", but **Exclude** all (other) tables that begin with "**Q**":
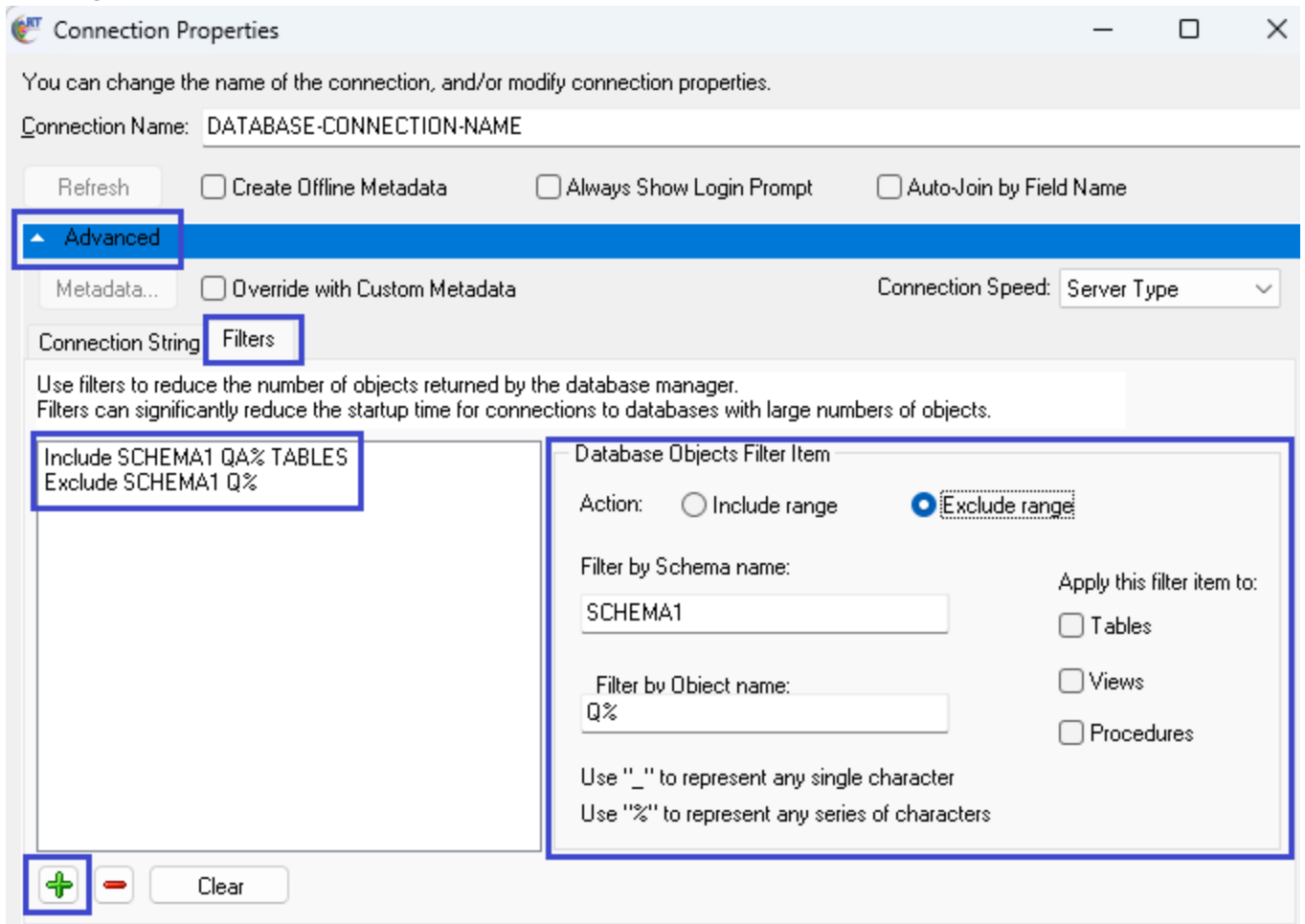

Press F1 or click the Help button to get additional information on how to use this screen, or see the **Filters** section of the Connection Properties online help.

8. Once the connection to your database server has been established, you can really begin to use the product! The best place to start is usually by building a Query, since queries provide data to the other RapidBI objects: Cubes, Reports and Dashboards:
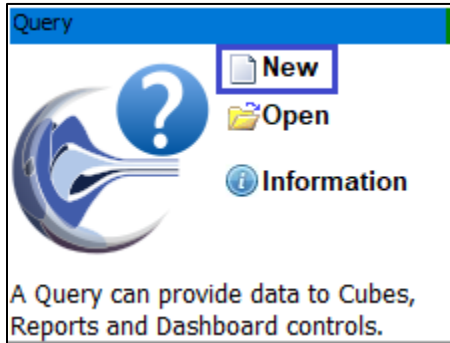
    If you haven't already, you should probably watch the Query Builder overview video.

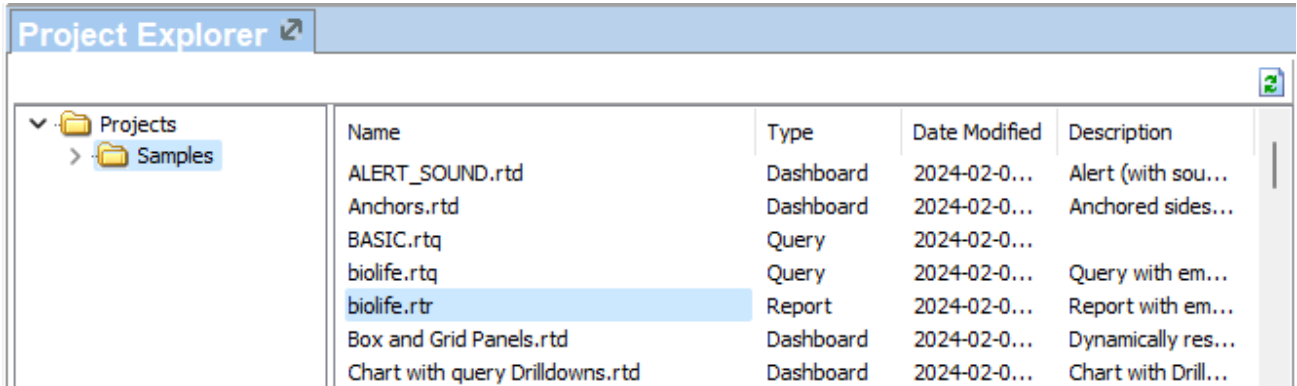9. Once your query has been built and saved, you can design a **New** Cube or Report:
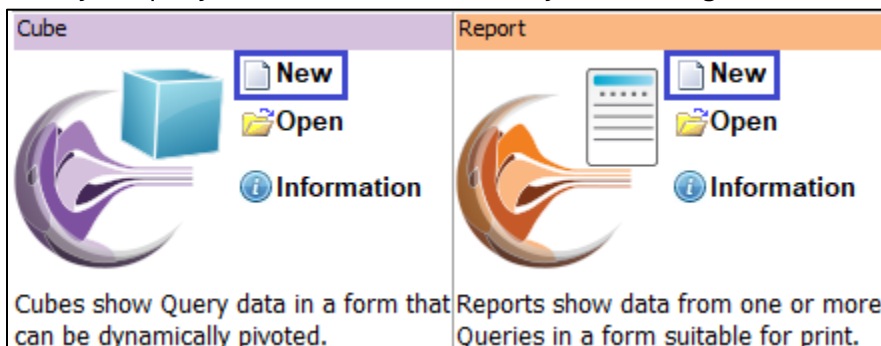
    You can watch the Cube Creator and Report Writer overview videos for additional details.

10. Unlike Cubes and Reports, Dashboards do not have to be designed over queries - but they often do reference Query, Cube and/or Report objects:
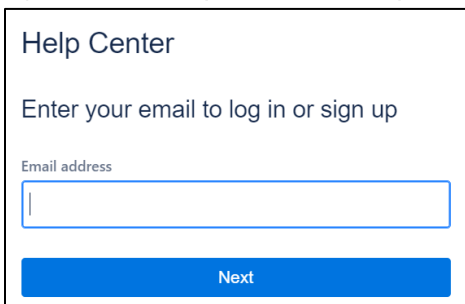
    Dashboard design is an advanced topic, so we strongly suggest that you watch the Dashboard Designer overview video.

11. For more inspiration, from the Project Explorer we suggest that you work with several of the objects in the **Samples** folder that is installed with the product:

12. If you still have questions, then please visit our Help Desk:
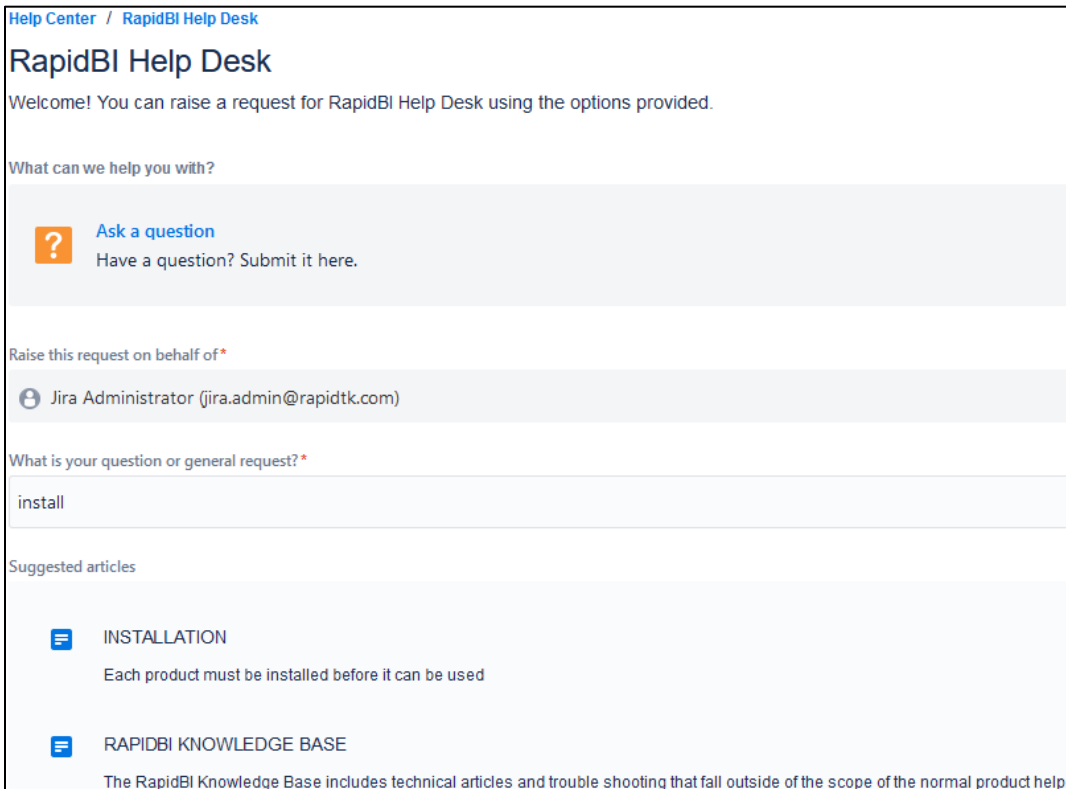
You can find links here to many different kinds of articles just by clicking on **Ask a question** and then typing the first few letters/words of your question:

And then finally, if you still can't find the answer, you can **Send** a question and we'll get back to you as soon as we can:

What can we help you with?

📄 **Submit a request or incident**
Submit a request or report a problem.

Raise this request on behalf of*

👤 Jira Administrator (jira.admin@rapidtk.com)

Summary*

Unable to download

Suggested articles

📄 **DOWNLOADS**
Files available to **download**:

📄 **RAPIDBI STUDIO**
You must run the RapidBI setup before using the product.

📄 **HOW-TO ARTICLES**
blueprint-index-page

What are the details of your request?*

Normal text ∨   **B** *I* …   A ∨   ☰ ☷   🔗 @ ☺ ⊞ <> ❶ 🙷 + ∨

I was trying to download the setup program but received a message...

Send   Cancel

We hope that you found this RapidBI Studio Quick Start guide informative and useful! As mentioned above, if you have questions and/or feedback, please your our Help Desk, our Contact Page, or send us an email directly at info@rapidtk.com.