



Modern Business Insights (MBI)

Data Connection Setup Guide

1. Introduction

This guide explains how to configure secure database connections in Modern Business Insights (MBI). Connections link MBI to your organization's data sources, enabling dashboards and reports to update dynamically. The Admin System Repository (ASR) and Target System Repository (TSR) manage all connection metadata and credentials.

2. Supported Data Sources

- Microsoft SQL Server
- IBM i (System i / AS400)
- Microsoft Access (.accdb / .mdb)

3. Before You Begin

- Ensure valid database credentials and sufficient user permissions.
- Verify network connectivity between the MBI server and your database.
- Only administrators can create or edit data connections.

4. Connecting to Microsoft SQL Server

- Open the *Connection Manager* in MBI.
- Select ****New SQL Connection****.
- Enter the following parameters:
 - Server Name or IP
 - Database Name
 - Username / Password
 - Authentication Type (SQL or Windows)
- Click *Test Connection* to validate credentials and save.

Example Connection String:

```
Server=SERVERNAME;Database=MBI_Data;User Id=mbi_admin;Password=securepass123;
```

5. Connecting to IBM i (System i / AS400)

- Select *Add IBM i Connection*.
- Enter host name or IP address of the IBM i system.
- Provide library name and user credentials.
- Choose data retrieval method (ODBC or JDBC).
- Click *Test Connection* and then *Save*.

Example Connection String:

DRIVER={iSeries Access ODBC Driver};SYSTEM=192.168.1.20;UID=MBIUSER;PWD=YourPassword;

6. Connecting to Microsoft Access

- Choose *Add MS Access Connection*.
- Browse to the *.accdb* or *.mdb* file location.
- Enter optional password if the database is protected.
- Click *Test Connection* to verify access.
- Save the connection to the repository.

Example Connection String:

Provider=Microsoft.ACE.OLEDB.12.0;Data Source=C:\\MBI_Data\\Pricing.accdb;

7. Testing Your Connection

After entering connection details, use the *Test Connection* button to ensure MBI can access the data source. If an error occurs, review credentials, network settings, and database permissions.

8. Saving and Managing Connections

- All connections are stored securely in the ASR repository.
- Role-based access ensures users see only authorized data connections.
- Administrators can rename, disable, or edit existing connections at any time.

9. Common Errors & Troubleshooting

Error	Cause	Recommended Fix
Connection Timeout	Firewall or incorrect server name	Check network access or DNS entry
Login Failed	Invalid username/password	Confirm credentials with your database administrator
Access Denied	Insufficient privileges	Grant correct access permissions to MBI user
ODBC Driver Not Found	Missing local driver installation	Install appropriate ODBC driver

10. Best Practices

- Use read-only credentials for reporting connections whenever possible.
- Adopt consistent naming conventions such as Finance_SQL or Inventory_iSeries.
- Validate all connections monthly for availability and performance.
- Re-test connections after any database upgrades or migrations.