Syniti Data Workbench

Installation and Upgrade Guide

Version 10.2

Software Release Date: 6/14/21

https://support.quadrate.com

Syniti Data Workbench

Document History

Version	Author	Date	Reviewer	Date	Comments
1	M. Rutledge	07/22/2011	R. Read	8/1/2011	
2	R. Read	9/1/2016	G. Lorenzin	9/26/16	
3	J. Drummey	3/12/18	A. Ferrari	3/21/18	
4	J. Lorenzin	10/7/20	PConrad	10/2/20	For install using IU Tool
5	J. Lorenzin	3/8/21	PConrad	3/1/21	
6	J. Lorenzin	6/7/21	PConrad	6/4/21	10.2 Release

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Overview

This document provides instructions for users installing, upgrading or migrating Syniti Data Workbench.

If you encounter difficulties during installation, be sure to contact support via the Help Center for assistance.

For information about using Syniti Data Workbench, including an explanation of product licenses and step-by-step tutorials, check out the online help.

System Requirements

- 64-bit or 32-bit processor
- 4 gigabytes (GB) or more of system memory recommended
- Approximately 10GB of available hard-disk space for the full installation (including SQL Server). 1GB required for enterprise client install or if SQL server is already installed
- An additional 100 MB or more per user for template storage
- Supported Operating Systems (64-bit and 32-bit):
    - Microsoft Windows 10 (Standalone or Enterprise Client)
    - Microsoft Windows 8 and 8.1 (Standalone or Enterprise Client)
    - Microsoft Windows Server 2019 (Enterprise Server)
    - Microsoft Windows Server 2016 (Enterprise Server)
    - Microsoft Windows Server 2012 R2 (Enterprise Server)
- SAP GUI 7.2 or later Installed Locally
- Microsoft SQL Server Express or Microsoft SQL Server 2014 or later with Windows Authentication enabled. (SQL Server Express 2017 will be installed on 64-bit systems and SQL Server Express 2014 will be installed on 32-bit systems, unless a different version is indicated.)
- .NET Framework 4.8 or later

.NET Framework Versions

Both the Install and Upgrade tool and Data Workbench require .NET Framework 4.8 or later to be installed on your system. If you are running an earlier version of .NET Framework (e.g. with Windows 7 operating system), you will need to install .NET Framework 4.8 before proceeding with installation using the Install and Upgrade tool. Check with your system administrator, or download and install the framework from https://dotnet.microsoft.com/download/dotnet-framework.

SQL Server Versions

Data Workbench uses Microsoft SQL Server to store metadata related to users, groups, recording, upload and download features in a database named QAS. The Data Workbench installation package can install either SQL Server Express 2017 (64-bit systems) or SQL Server Express 2014 (32-bit systems), taking care of all configuration and preparation of SQL Server for use with Data Workbench. If you have an existing installation of Microsoft SQL Server that you want to use, follow the directions on the install/upgrade/migration sections. Note that **any alternative version of SQL Server must be installed prior to installing Data Workbench**. It is highly recommended that a database administrator perform any custom installation or configuration of SQL Server.

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The installation process:

- Creates a QAS database in the designated SQL Server instance, with a default user **qasUser** and password **Qu@dr8q@s.**
- Creates a SQL Server **sa** user with the password **$D@t@W0rkb3nch.**
- Creates a Windows Authentication login with sysadm permissions for the User logged into the PC where the SDW installation is occurring.

The upgrade process:

- Updates the QAS database in the designated SQL Server instance, using the supplied login and password. Note that it is possible to use the **qasUser** login when upgrading using a custom database, but **qasUser** must have sufficient permissions (db_owner, db_backupoperator or sysadmin rule).

SAP Authorization Requirements

Authorization object:	S_RFC (class: AAAB)
Activity:	16 (execute)
Name of RFC to be protected:	ATSV, CADR, LOI5, MRFC, RFC1, RFC2, RFCH, SBDC, SBDR, SCAT, SDIFRUNTIME, SDTX, SLST, STTF, STTM, SUSO, SWOR, SWP2, SYST, Z_QUADRATE
Type of RFC to be protected:	FUGR (Function Group)

Authorization object:	S_TABU_DIS (class: BC_A)
Activity:	03 (display)
Type of RFC to be protected:	*

For the download data from SAP feature, the following authorizations are also needed:

Authorization object:	S_ADMI_FCD
Value:	MEMO

Authorization object:	S_GUI
Activity:	61

Syniti Data Workbench Download Requirements: SAP Transports

Before using the Download/Query feature, your Basis team needs to install two transports on the SAP instances that Data Workbench uses: K9A010D.RD2 and R9A010D.RD2. The Z_Quadrate_Extract and the Z_QUADRATE_EXTRACT_WORK functions will be installed.

The transports are located in the Data Workbench install directory under DataWorkbench\Sdw_extract, usually:
 C:\Program Files (x86)\Syniti\DataWorkbench\DataWorkbench\Sdw_extract.

Z_QUADRATE_EXTRACT/ Z_QUADRATE_EXTRACT_WORK

The modules are the conduit between the Data Workbench query builder and the SAP data store. They:

- Eliminate malicious query statements (e.g. INSERT, UPDATE or DELETE).
- Check the SAP table level authorizations to confirm the user has sufficient authorizations to view data from each of the tables in the query.

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- Convert data to an ABAP query and executed against the SAP database.
- Pass back results to Data Workbench for conversion into Excel format.

Installation Type

When installing Data Workbench, you choose one of the following installation types:

Installation Type	Description
Standalone	Installs all Data Workbench components on one system for use by a single user. This type of installation is best suited for a single user of the product within a company, or multiple users that do not want centralized security or the ability to share templates and upload mappings.
Enterprise Server	Installs the server component (QAS Authentication Server) necessary for a multi-user installation with sharing functionality. This should only be installed on one centrally accessible machine within the company. In addition, the client installation needs to be performed on each user's machine. An enterprise installation is best suited for multiple users within an organization and provides the following features: • Centralized security • Easy sharing of templates and upload mappings
Enterprise Client	Installs the client application on each of the user's machine. This installation option requires the name of the server where the Enterprise Server Installation was performed. (Only install this if the Enterprise Server was installed).
Custom	Installs selected components according to need. This installation option also allows you to set port numbers for the different Data Workbench components.

Data Workbench Architecture

Data Workbench consists of 3 main components:

- QAS Authentication Server database, a SQL Server database for storing templates and user/administration information.
- Data Workbench graphical user interface for creating and managing data uploads/downloads
- QEE Execution Engine, a Windows service for running data uploads and/or data downloads on a schedule.

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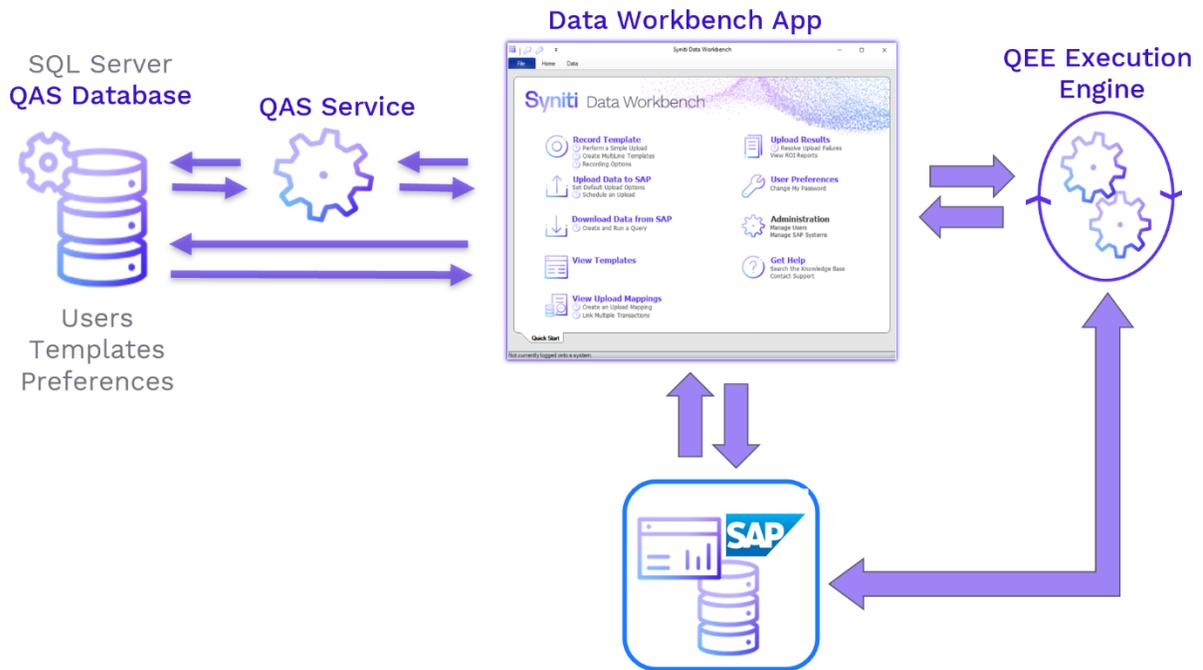
Enterprise Server Installations: Configuration Worksheet

Choose a table below to note the all information needed to install, upgrade or migrate a Data Workbench instance. Filling out this information in advance will provide a smoother install/upgrade/migrate experience.

New Enterprise Server Installation	
Name/IP address of server where QAS service will reside	
Name/IP address of the Windows Server where the SQL Server Instance is installed.	
Name of SQL Instance	
qasUser password, if created or modified from default	
Default QAS Service port is 3333 – provide the new port if you wish to change it.	
Default QEE port is 3334 – provide the new port if you wish to change it.	

Update Enterprise Server on the Same Server	
Name/IP address of server where QAS service currently resides	
Name/IP address of the Windows Server where the SQL Server Instance is installed	
Name of SQL Instance	
qasUser password, if created or modified from default	
QAS Service port (Default is 3333)	
QEE port (Default is 3334)	

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Migrate Enterprise Server to a New Server

Current: Name/IP address of server where QAS service currently resides.	
Target: Name/IP address of server where QAS service will reside	
Current: Name/IP address of the Windows Server where the SQL Server Instance is installed.	
Target: Name/IP address of the Windows Server where the SQL Server Instance is or will be installed.	
Current: Name of SQL Instance	
Target: Name of SQL Instance	
Target: qasUser password	
Target: QAS Service port (Default is 3333)	
Target: QEE port (Default is 3334)	

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Download Data Workbench

To download Syniti Data Workbench:

1. In a web browser, go to: https://www.syniti.com/sdw-download-links/.

2. Enter your Data Workbench key to access the downloadable files.

3. Read and scroll to the end of the License Agreement page to accept the terms of the license agreement.

4. On the **Syniti Data Workbench Download** page, click the **SynitiDataWorkbench_10.0.x_Automatic_Install_Upgrade.zip** link to download a zip file containing the Installation Guide and a self-extracting setup file.

5. Right-click on the downloaded zip file and choose **Extract All** to extract the files in the zip file to a folder of your choice.

Installation Options

When you first run the **SynitiDataWorkbench_SelfExtractingSetup.exe**, the program checks to see what is already installed on your system and offers a set of choices to proceed based on its findings. Some choices are not available under certain conditions:

Install Data Workbench for the first time on a system	Available when no Data Workbench installation is detected on the system where the setup is running.
Upgrade to the latest version on the same server/system	Available when the Data Workbench version installed is older than the setup that is running
Migrate from any version to the latest version on a new server	Available when an older or current Data Workbench installation is present on the system to perform step 1 of a migration. Also available when no Data Workbench is installed to perform step 2 of a migration on a new system.
Update/repair a current installation	Available when the Data Workbench version installed matches the setup that is running
Create a silent script for Data Workbench Enterprise Client setup	Always available. Data Workbench does not need to be installed to create a script for a client setup.

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Install/Upgrade Data Workbench Standalone

> Install and use all Syniti Data Workbench components in one location for a single user

1. Double-click on the self-extracting installation package **SynitiDataWorkbench_SelfExtractingSetup.exe.** The Syniti Data Workbench Installation and Upgrade tool launches automatically.
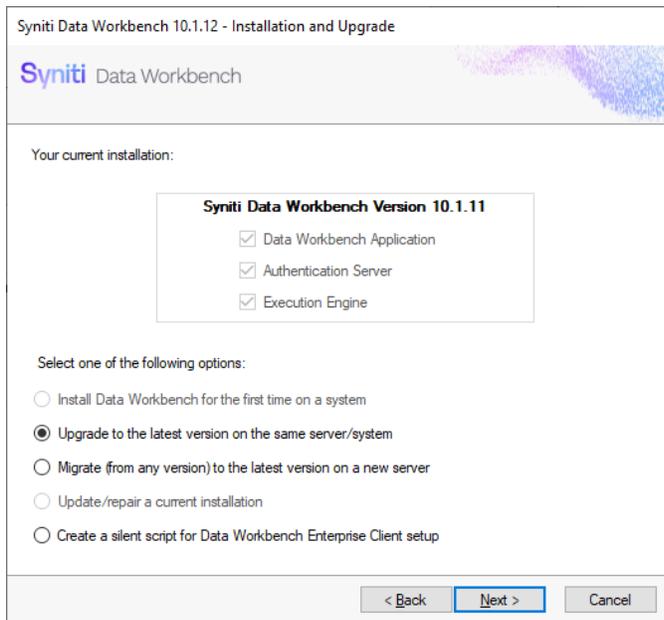
2. Select either Install or **Upgrade** and click **Next**.

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3. When you get to the **Select Components** screen, choose **Standalone Installation** and click **Next**. (Standalone installations also install a local instance of the Microsoft SQL Server to store the QAS database for template and user information.)

4. Accept the default settings on the **Configure QAS Database** screen :

New Installation	Upgrade

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> **NOTE**: DATABASE CONNECTION ERROR
>
> If an error is received regarding connection to the Current Data Workbench SQL Instance, use the dropdown next to the Authentication field and choose SQL Server Authorization. Use sa for the User and one of the following passwords.
>
> - Original Dataworkbench Install 9.12 and below, use password: *quadr8qas*
> - Original Data Workbench version 9.13.X, use password: Qu@dr8q@s
> - Original Syniti Data Workbench version 10.0, use password: $D@t@W0rkb3nch

5. Click **Next**.

6. Complete the installation by following the steps in the setup screens carefully.
   Here are some brief notes on steps that occur during installation.

   - SQL Server Express may be installed as part of the setup, depending on your current environment. You can typically accept the default settings in any dialogs.

   - After SQL Server files have been extracted, the SQL Server installation proceeds. This process typically takes at least 15 minutes. If an error occurs during the SQL Server Express installation, cancel the Data Workbench setup. If the error is due to an internet issue, try the installation again when you have access to a fast, reliable internet connection. Contact the Data Workbench support team via the Help Center for further assistance.

   - If you are upgrading, you may see the following warning message. When you click **OK**, the password is set as described in the Default SQL passwords section.
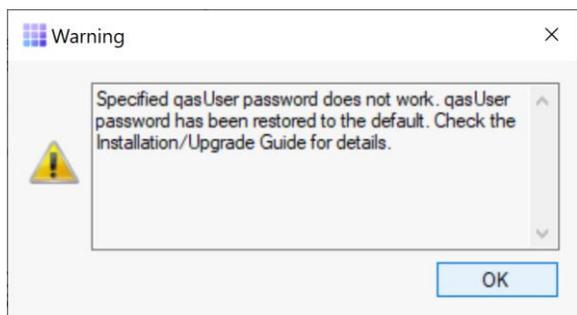
Once installation is complete, the next step is to Activate Data Workbench.

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Install/Upgrade Data Workbench Enterprise Server

> Install and use some or all Syniti Data Workbench components on a server for access by one or more client systems
> - SQL Server QAS database can be local or remote
> - Data Workbench GUI can also be installed
> - Execution Engine can also be installed
> - Use configuration worksheet to help during installation

1. Complete the configuration worksheet to plan the configuration in your environment.

2. Double-click on the self-extracting installation package **SynitiDataWorkbench_SelfExtractingSetup.exe.** The Syniti Data Workbench Installation and Upgrade tool launches automatically.

3. Choose the Install or Upgrade option.

4. Choose the component(s) that are installed or that you want installed.
   The default Enterprise Server option installs/upgrades **only** the QAS Authentication Server component on port number 3333. If any of the following cases are true for your environment, check **Customize** to allow modifications to the default installation:

   - You want to use the Data Workbench application on the server system.
     For this option, select the additional components **Data Workbench Application.**

   - You want to install the Execution Engine on the server system. For this option, select the additional component **Execution Engine**.

   - You want to modify the default port number for the Authentication Server.

   - You want to install using the **qasUser** login. Note that this may require adding further permissions/roles to **qasUser** (db_owner.db_backupoperator or sysadmin rule.)

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5. In the **Configure QAS** Database screen, consider the following items before making your choices.

- For new installations, if **Standard Setup** is selected, a SQL Server Instance will be automatically installed.

- On a 64-bit Windows Server, SQL Server Express 2017 will be installed.

- On a 32-bit Windows Server, SQL Server Express 2014 will be installed.

- For new installations, if using a custom SQL Server Instance, the SQL Server Instance must be installed before running the Install and Upgrade tool.

- For an upgrade, if using a different SQL Server instance from the one used with the current version of Data Workbench, be sure that the new SQL Server Instance has been installed and check the option **Use a different SQL Server instance instead of the current instance for the new DataWorkbench**.

New Installation	Upgrade

Syniti Data Workbench 10.1.1 - Installation and Upgrade
 	
Configure QAS Database
Select the QAS database configuration and add SQL Server credentials.
 	
Choose a setup:
  Standard Setup
  ⦿ Installs a default QAS database for server and standalone installations and/or sets up user access if needed.
  ○ Custom Database Setup
    Sets up access to the QAS database in a custom location with specified user ID if needed.
 	
Set a SQL Server host and instance name with valid login credentials for the QAS database used by Data Workbench to store metadata.
 	
  HOSTNAME\INSTANCE:
  Authentication: SQL Server Authentication
  User:
  Password:
 	
  ⦿ Use default password for qasUser login ID
  ○ Use custom password for qasUser login ID
  qasUser's Password:
 	
         < Back Next > Cancel
	Syniti Data Workbench 10.1.13 - Installation and Upgrade
	
	Configure QAS Database Backup
	Enter the current SQL Server connection information.
	
	Current DataWorkbenh SQL Server instance:
	  HOSTNAME\INSTANCE: LAPTOP-LDKN55OJ\QUADRATE
	  Authentication: Windows Authentication
	  User:
	  Password:
	
	  ⦿ Use default password for qasUser login ID
	  ○ Enter your custom password for qasUser login ID
	  qasUser's Password:
	
	  ☐ Use a different SQL Server instance (instead of the current instance) for the new DataWorkbench
	
	         < Back Next > Cancel

6. Click **Next** to continue.

7. For new installations, the Ready to Install page displays the required components that will also be installed:

SQL Server Installation	On a standard install (Versions noted above)

8. Click **Next** to begin the the Install/Upgrade.

9. If the correct version of .NET Framework (4.8) is not installed, please exit the Data Workbench Install and Upgrade process, then install .NET Framework 4.8 before continuing. Do not skip this step.

10. On an Install, if the Standard Setup is chosen, select a temporary folder for the SQL Server downloaded files or click **OK** to accept the default folder.

Choose Directory For Extracted Files   ✕

Choose Directory For Extracted Files

cal\Temp\IXP000.TMP\Support\SQLEXPR_x64_ENU\

Ok   Cancel   Browse...
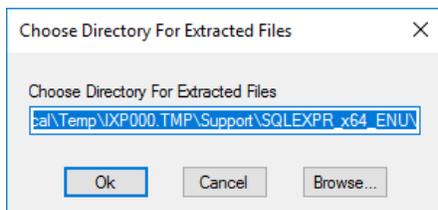
After the SQL Server files have been extracted, the SQL Server installation proceeds. This process typically takes at least 15 minutes.

NOTE: If an error occurs during the SQL Server Express installation, cancel the Data Workbench setup. If the error is due to an internet issue, try the installation again when you have access to a fast, reliable

internet connection. Contact the Data Workbench support team via the Help Center for further assistance.

11. Click **Finish** to complete the setup and return to the Install and Upgrade tool.
    The Install and Upgrade tool applies final configuration settings:
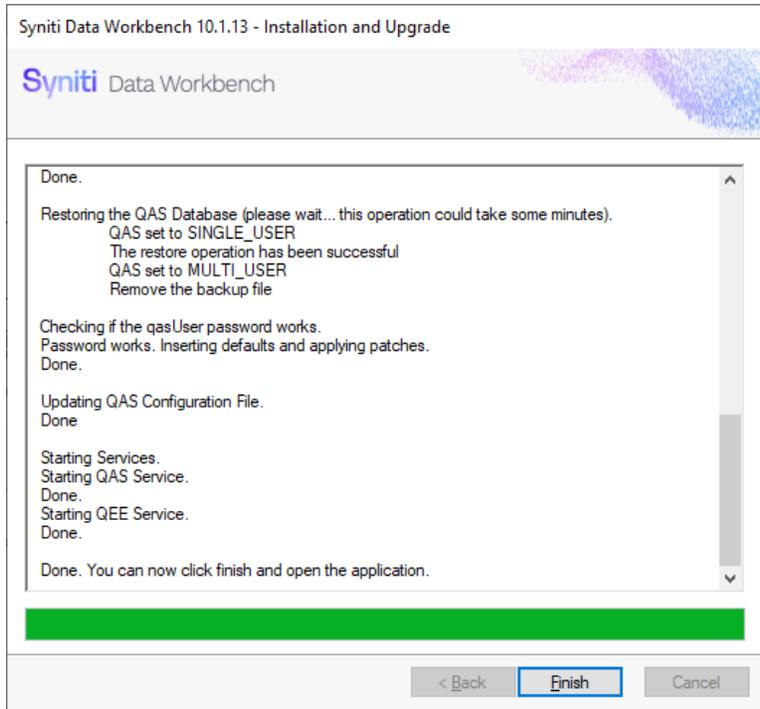
12. Click **Finish** to complete the installation.

13. On the system running SQL Server, check that the SQL Server Browser service is running.

14. In the SQL Configurator on the Windows SQL server, enable TCP/IP pipes if disabled.

15. If using Windows firewall, check that exceptions have been set up to allow connections for Data Workbench.

16. The next step is to Activate Data Workbench.

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Install Data Workbench on a Client

Create client installation package and install on one or more clients

RECOMMENDED: <u>Install Data Workbench on the Enterprise Server</u> before performing any client installation. This makes setting up the connection from each client to the server easier.

Use the Data Workbench Self Extracting Setup to create a script for installing one or more clients. This generates a batch file that includes commands to run the DataWorkbenchSetup.exe with command line options.

1. Double-click on the self-extracting installation package **SynitiDataWorkbench_SelfExtractingSetup.exe.** The Syniti Data Workbench Installation and Upgrade tool launches automatically.
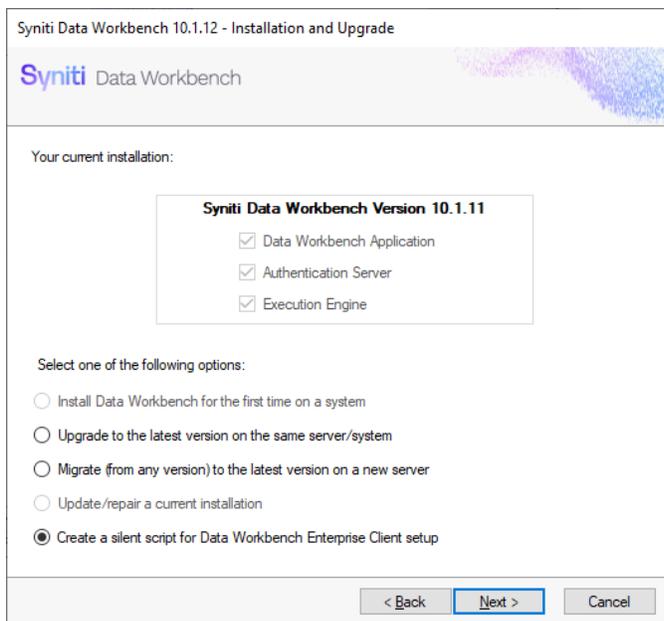
2. Choose the option to **Create a silent script for Data Workbench Enterprise Client setup**.

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3. When you get to the Set Authentication Server Location, set the server and port number that the client should use to connect to the Data Workbench QAS server.

4. Click **Next**.

5. In the **Create Client Setup** screen, select a location for the client setup files.

6.   Click **Next**.

7.   Review the changes and click **Apply** to create the client setup.

This procedure creates:

- DataWorkbenchSilentClientSetup.bat, a script to install Data Workbench Enterprise Client in silent mode.
- DataWorkbenchSetup.exe, the Data Workbench setup file.

8.   Copy the files to each client system and run **DataWorkbenchSilentClientSetup.bat**.

Migrate Data Workbench to a New Server

Migrating an existing installation of Data Workbench Enterprise Server from one system to another, upgrading to the latest version.
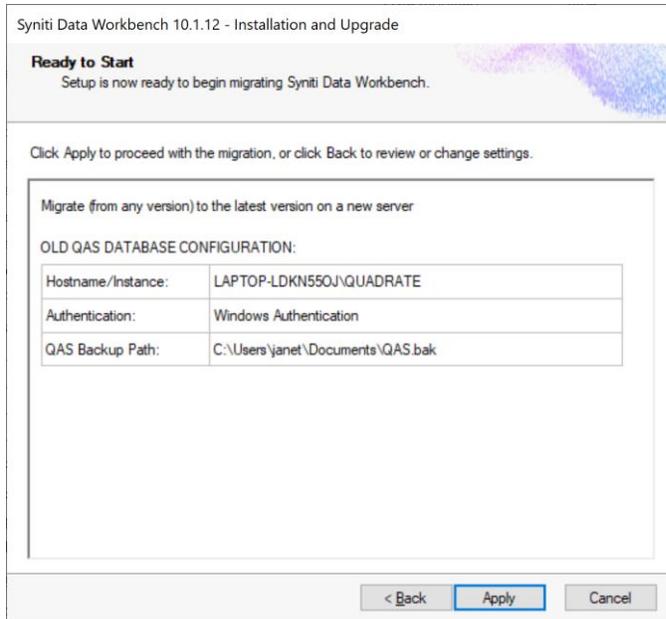
Steps On the Old Server

1.   Deactivate your current installation of Data Workbench.

- From the Windows menu, run the Quadrate or Syniti **Configuration and Diagnostic Utility**.
- Click the **Deactivate License** option.
  It is more efficient to deactivate online, if possible. If you need to deactivate via email, be sure to follow instructions and send the email. If you do not complete this step correctly, you will not be able to activate Data Workbench after installing the new version.

2.   Double-click on the self-extracting installation package **SynitiDataWorkbench_SelfExtractingSetup.exe**.
The Syniti Data Workbench Installation and Upgrade tool launches automatically.

3. Select the option Migrate (from any version) to the latest version on a new server.
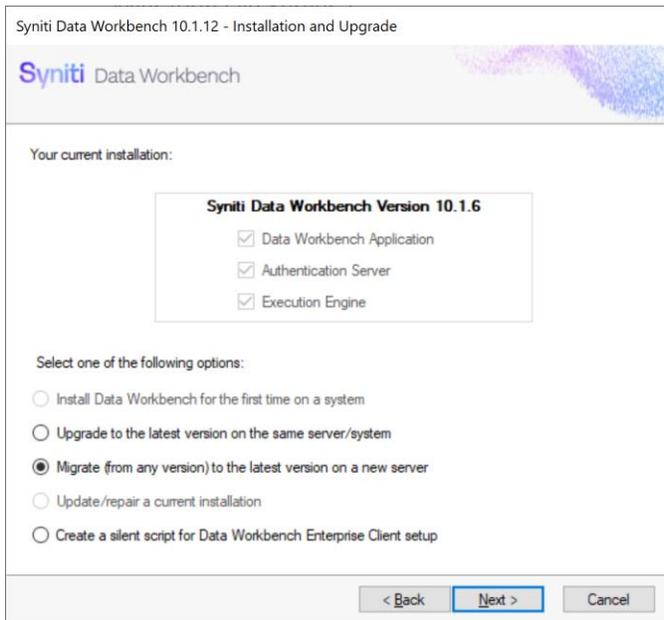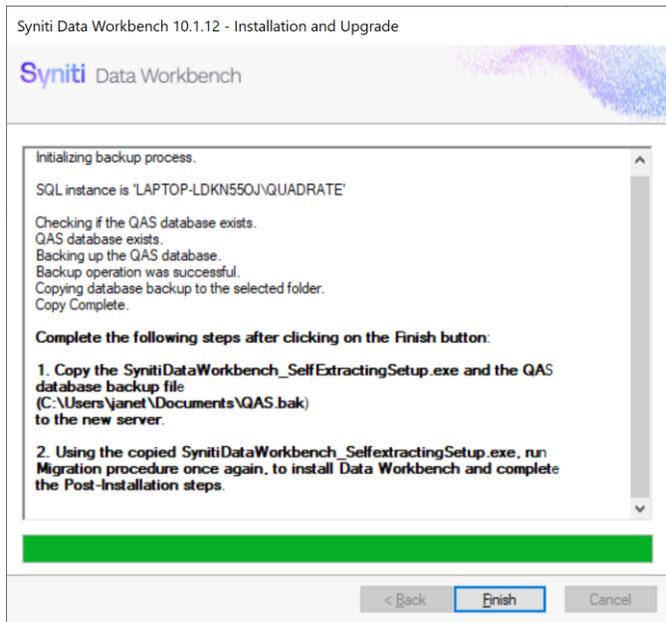

4. Click Next and complete the remaining screens.
5. The final screen displays the information that will be used to back up the Data Workbench QAS database.
6. Click **Apply**.

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After clicking **Apply**, the steps needed for the migration to the new server are displayed.

Steps on the New Server

1. Make sure that the **SynitiDataWorkbench_SelfExtractingSetup.exe file** and the **QAS.bak** file have been copied to the new servers as noted in the final screen of the 1st of the Migration.

2. Double-click on the self-extracting installation package **SynitiDataWorkbench_SelfExtractingSetup.exe.** The Syniti Data Workbench Installation and Upgrade tool launches automatically.

3. Select the option **Migrate (from any version) to the latest version on a new server**.

4. Click **Next**.

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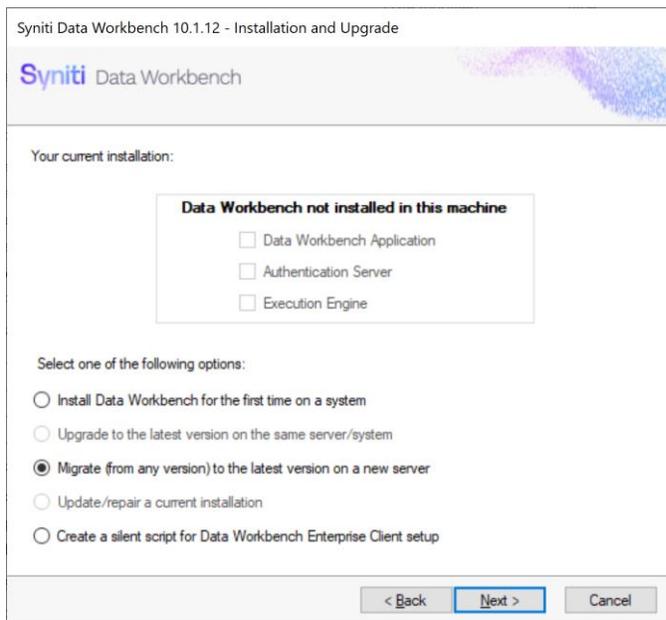
5. In the **Select Components** screen, choose the type of installation that matches your installation on the old server.

6. Click **Next**.

7. In the **Configure QAS Database** screen, provide details of your SQL Server installation if it is not the standard/default installation shown.

   - For the Standard Setup, Microsoft SQL server Express will also be installed on the new system.

   - For migrations using a Customized SQL Server, be sure to check **Custom Database Setup** option. Use the completed configuration worksheet to enter the correct values.

8. In the **Restore QAS Database** screen, set the path to the QAS.bak file that you have copied to the local Windows Server.

9. Continue running the installation phase of the migration. Use the Install/Upgrade sections of this guide if you need additional information.

10. Once the final screen displays without any errors, Click **Finish**.

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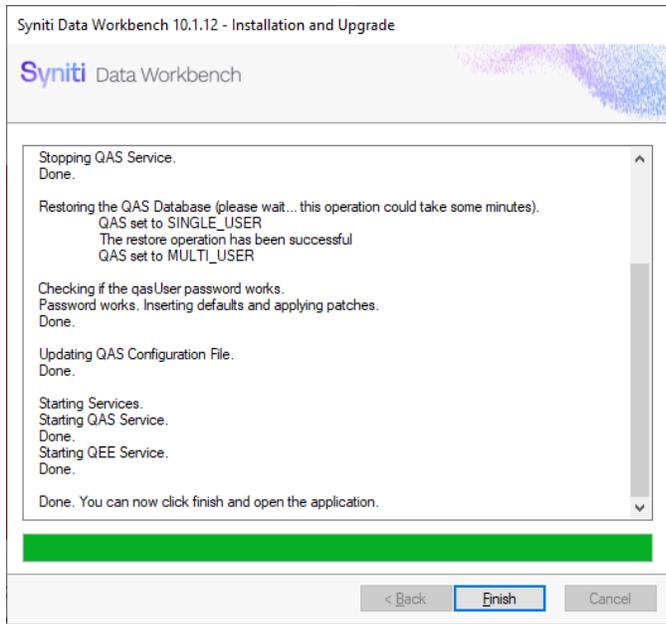
11. On the system running SQL Server, check that the <u>SQL Server Browser service is running</u>.

12. In the SQL Configurator on the Windows SQL server, <u>enable TCP/IP pipes if disabled</u>.

13. If using Windows firewall, <u>check that exceptions have been set up to allow connections for Data Workbench</u>.

14. The next step is to <u>Activate Data Workbench</u>.

Repair a Data Workbench Installation

The **Update/Repair an Installation** option allows you to repair the following problems with your installation:

- QAS database does not exist
- qasUser does not exist
- Some QAS database tables are missing
- Some QAS database default values are missing
- Authentication Server is not able to connect to QAS database
- Client connection issues when connecting to the QAS database

To repair or update an installation:

1. Double-click on the self-extracting installation package **SynitiDataWorkbench_SelfExtractingSetup.exe.** The Syniti Data Workbench Installation and Upgrade tool launches automatically.

2. Select the option **Update/repair a current installation** and click **Next**.
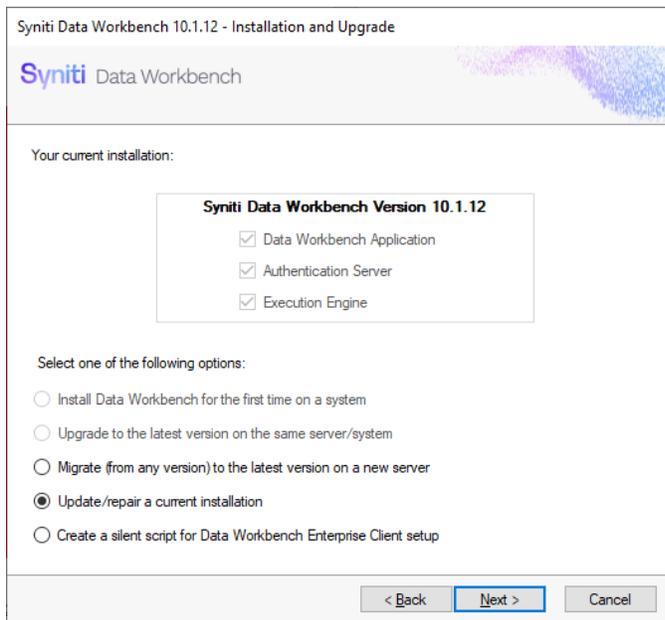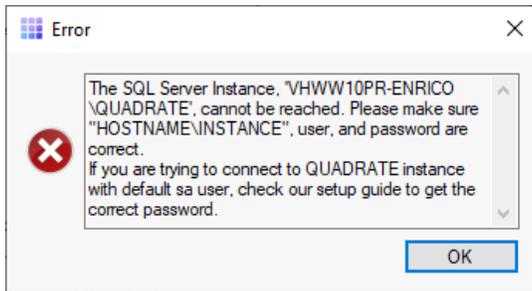
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3. In the Repair screen, make selections and enter the correct information using the table below to aid your choices.

Issue	Steps to Resolve Issue
Data Workbench UI will not start and user receives an error message in regards to the database.	1. Ensure that the Hostname\Instance name is correct or update it to the correct value. 2. Use the Windows Authentication or use SQL Server Authorization with the sa user and <u>appropriate password</u>. 3. If the qasUser password has been changed from the default, choose **Enter your custom password for qas User Login ID** and enter the updated qasUser's password. 4. Click **Next.**
One or more Enterprise Clients receive errors when connecting to the SQL Server Instance.	1. Change the Hostname to the IP address of the Windows Server where the SQL Instance resides. You might need to add a port number to the end of the Hostname\Instance value. If so, precede the port number with a comman (,). 2. Click **Update Authentication Server Connection String**. 3. Click **Next**.

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Login Credentials and Default Passwords

If during a repair process, when you are entering the SQL Server login credentials and they are not recognized, the following error is displayed.

The following list of default passwords for the **sa** user may be helpful in resolving the issue:

- *quadr8qas* when installing SQL Server using Syniti Data Workbench versions up to 9.12.x.
- *Qu@dr8q@s* when installing SQL Server using Syniti Data Workbench version 9.13.
- *$D@t@W0rkb3nch* when installing SQL Server using Syniti Data Workbench version 10.0.
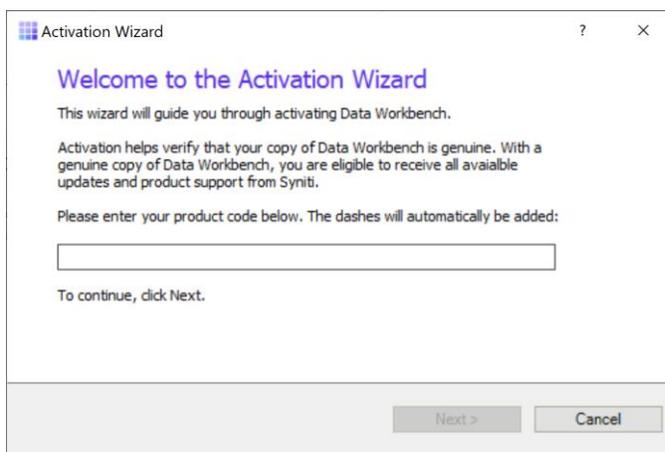
Activate Data Workbench

When you start Data Workbench for the first time, the license must be activated via the Activation Wizard. This wizard allows you to activate the product in one of two ways:

- Online Activation
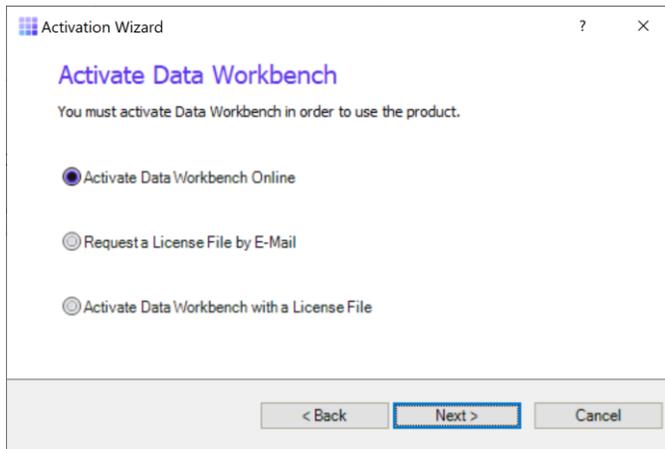- Offline License File Activation

Online Activation

1. Enter the product key in the text box on the first page of the Activation Wizard.

2. Click **Next**.

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3. Select **Activate Data Workbench Online**.

4. Click **Next**.

   If you are connecting through a proxy and the proxy requires authentication, you will be prompted for your username and password. This information can be obtained from your internal IT Department.

5. After Online Activation has finished, click **Finish**.

6. You should now be able to log in to Data Workbench using one of the IDs that was stored in the QAS database from your previous installation.

   If you encounter issues or have questions about running this version of Data Workbench, check the user's guide or contact the support team via the Help Center.

Offline License File Activation

1. Enter the product key in the text box on the first page of the Activation Wizard.

2. Click **Next**.

3. Select the option: **Request a License File by E-Mail**.

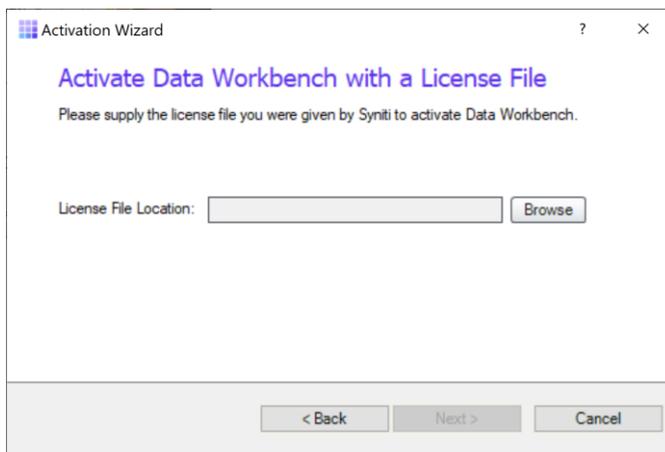4. Click **Next** to continue.
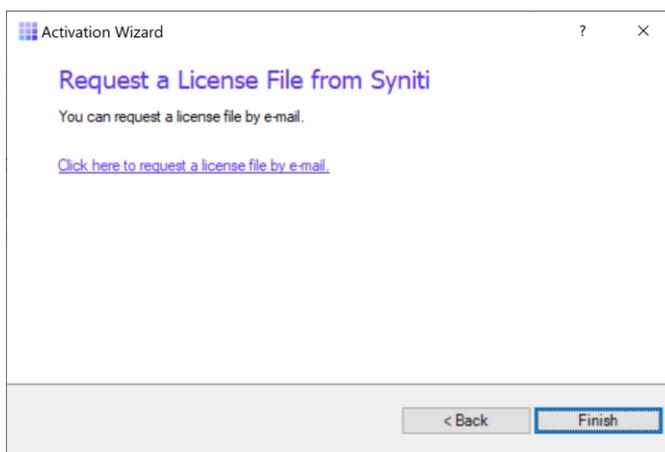
5. Choose the **Click here to request a license file by e-mail** option to open an email client with a message to send to the Syniti licensing team.

6. Click **Send** to send the email.

NOTE: If an email is not automatically generated, follow the instructions on the License File Requested page to manually create an activation email to send to Syniti. Alternatively, contact the support team via the Help Center.
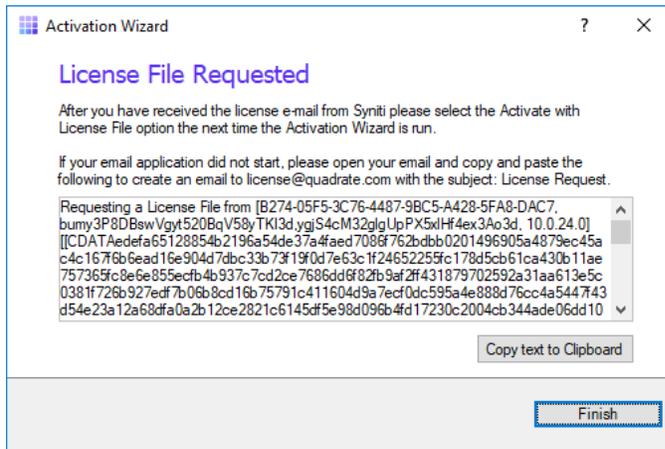
7. Click **Finish**.

8. Once the email with the license file is received, save the attached QLIC file to your desktop.

9. Start Data Workbench.

10. In the Activation Wizard, enter the product key.

11. Select **Activate Data Workbench with a License File**.

12. Click **Next** to continue.

13. Click **Browse** to locate the QLIC file that you received from the licensing team.

14. Click **Next** to continue.

15. After the activation process is complete, click **Finish**.

16. You should now be able to log in to Data Workbench using the default user and password:

User	admin
Password	admin

17. . If you encounter issues or have questions about running this version of Data Workbench, check the user's guide or contact the support team via the Help Center.

Configure Data Workbench

Logging on for the first time (Enterprise Installation Only)

If you are running in an Enterprise Installation model, a username and password is required to access Data Workbench. User names and passwords can be configured on the Administration Page after logging in. The default user name and password are:

User name	admin
Password	admin

Add SAP Systems

Each SAP system used with Data Workbench must be added using the System Instances Page. For Enterprise installations, the SAP systems are added once and automatically shared to all users. For security, an administrator must grant a user access to each system on the Manage User/Group Page.

To add system instances:

1. Open Data Workbench and log on using the default username and password.

2. Click the **Administration** tab.

3. Click **View System Instances**.
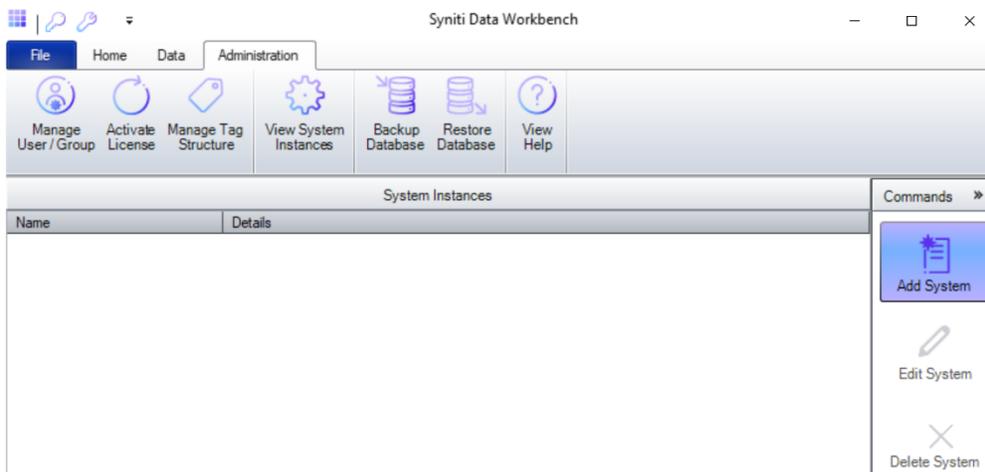
4. Click **Add System**.

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5. Complete the fields in the Available Systems Connection dialog.
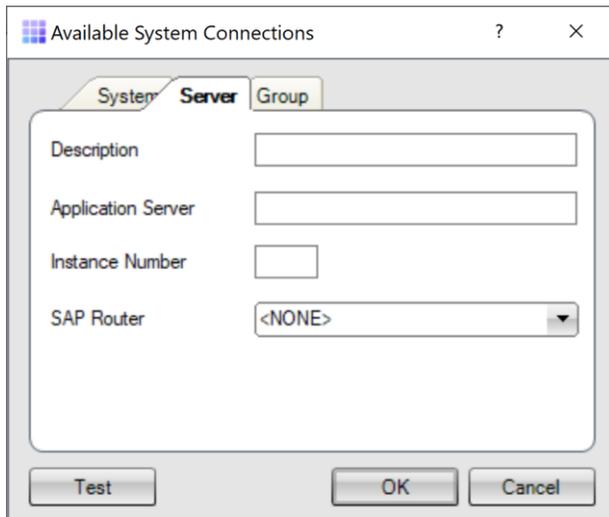
6. Click **OK.**

To grant access to a system:

1. From the **Administration** tab, click the **Manage User/Group**.

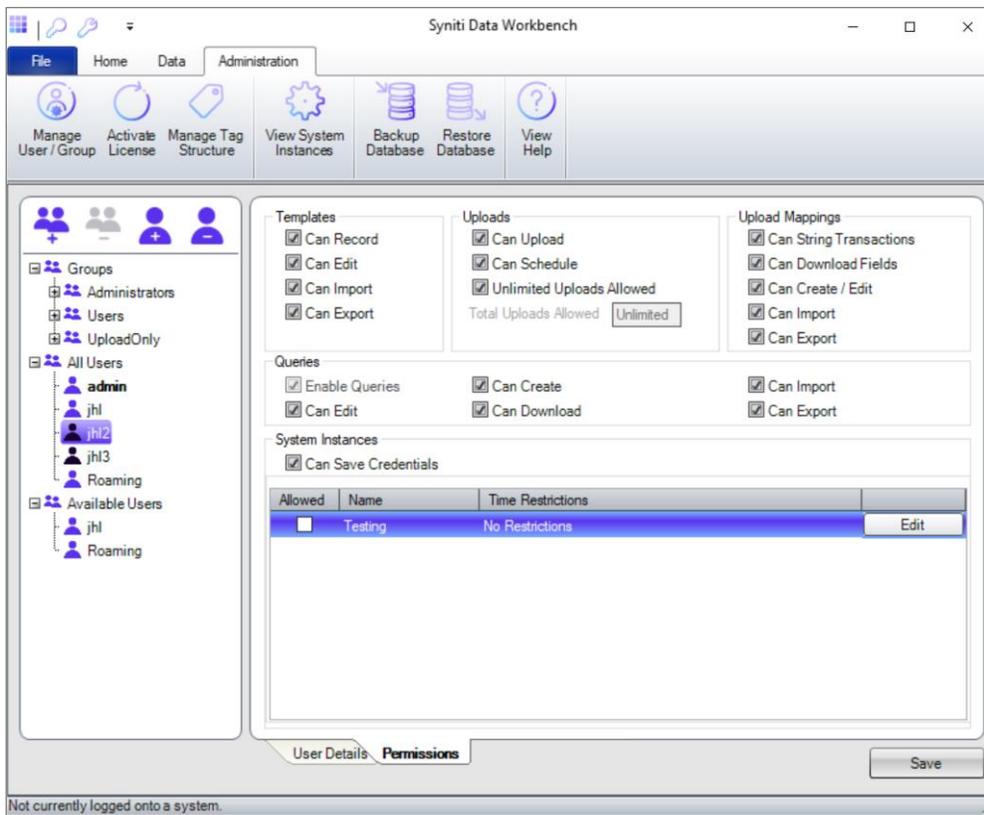2. Select the relevant user.

3. Select the **Permissions** tab.

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4. Click the **Allowed** checkbox to grant or deny access to each system.

5. Click **Save**.

For more information about configuring users and SAP systems, see the online User's Guide, or download the Users's Guide in PDF format from the Help Center.

Set up Local Help

The default User's Guide is located on a central server (https://sdwhelp.syniti.com/101/UsersGuide/Roadmap.htm) and you therefore need internet access to open the help. If you are working in an environment without internet access, you can request a zip file containing the User's Guide from the support team via the Help Center. To install help files locally:

1. Open the SynitiDataWorkbenchUsersGuide.zip.

2. Drag and drop the **UsersGuide** folder in the Data Workbench installation folder (Default location is C:\Program Files (x86)\Syniti\DataWorkbench):
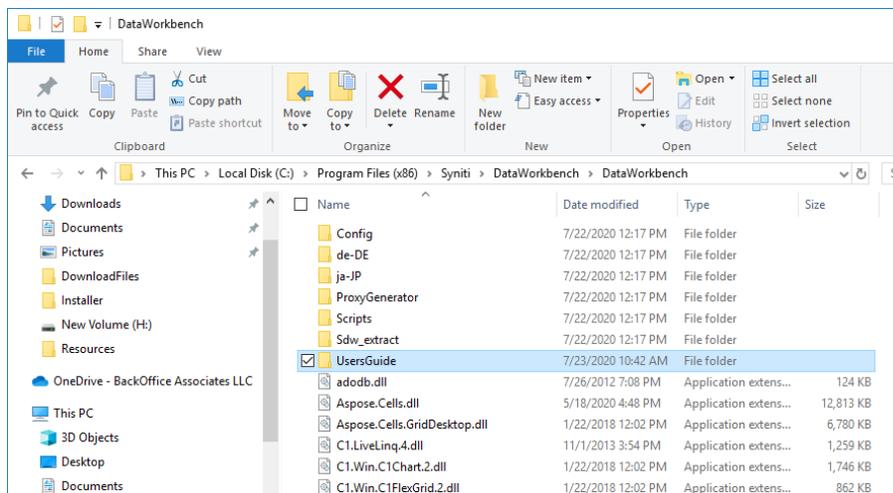
3. Open the **User Preferences** from the icon at the top of the Data Workbench window.

4. Check the **Use Local Help** option.

5. Click **OK** to save your change.

Install MS SQL Server Manually

> Manual Install of custom Microsoft SQL Server
>
> - The Named Instance and Instance ID should match.
> - The server should be configured for Mixed Mode (SQL Server authentication and Windows authentication).
> - The SQL Server login ID used during Data Workbench installation should have authorization to create users, databases and tables.
> - Use information on the Configuration WorkSheet.

1. Download the appropriate SQL Server version from the Microsoft website.
2. Run the installer.
3. Click **New SQL Server stand-alone installation or add features to an existing installation**.
4. Choose the option **Perform a new installation of SQL Server**.
5. During the installation process, choose the following options:

   - SQL Server installations for use with Data Workbench must include **Database Engine Services**
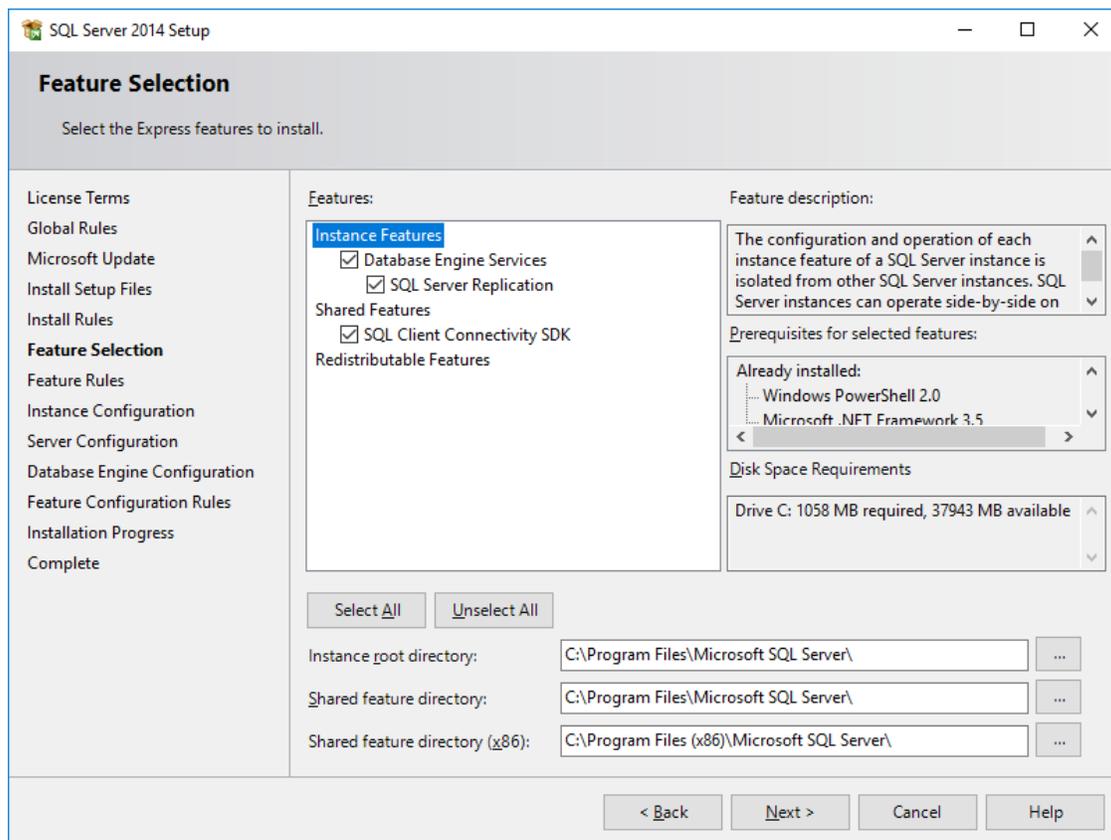
- Click the **Named Instance** option and enter **QUADRATE** into the text box for Named Instance **and** Instance ID.

  NOTE: Both **the named instance and the instance ID must match**. QUADRATE is the name used during a standard installation, but you can also use a different name.
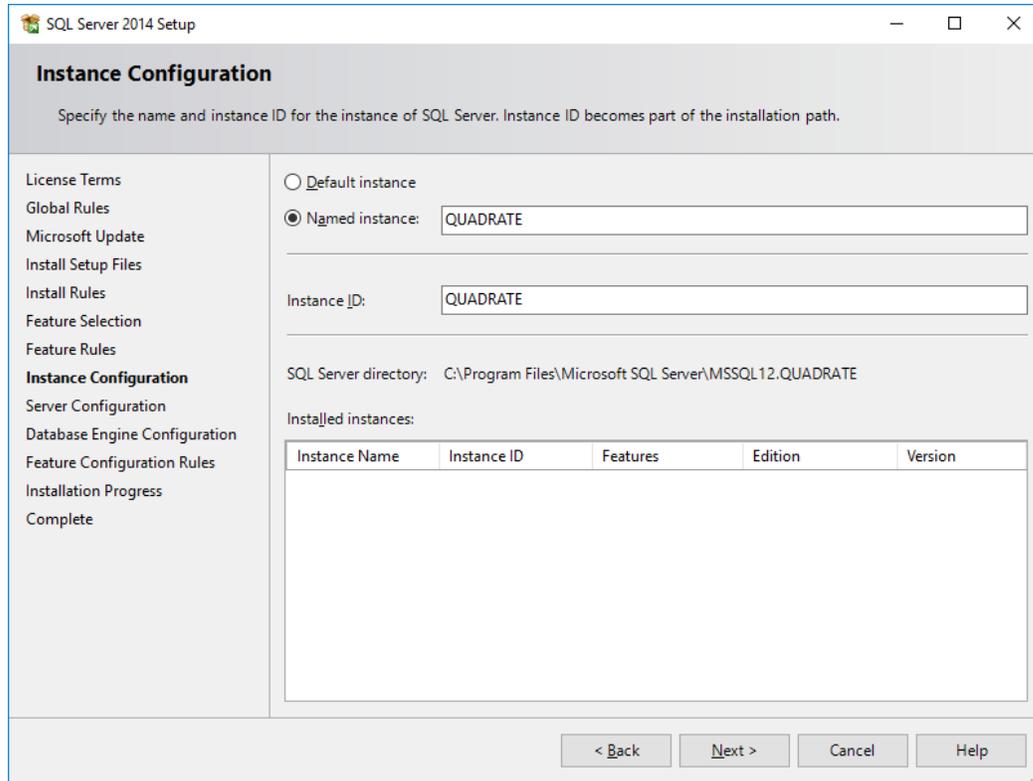
- On the Server Configuration tab, use the **Mixed Mode (SQL Server authentication and Windows authentication)** option and create a strong password for the SQL Server Administrator (sa) account. Be sure to note the sa password. It will be used in the Data Workbench installation.
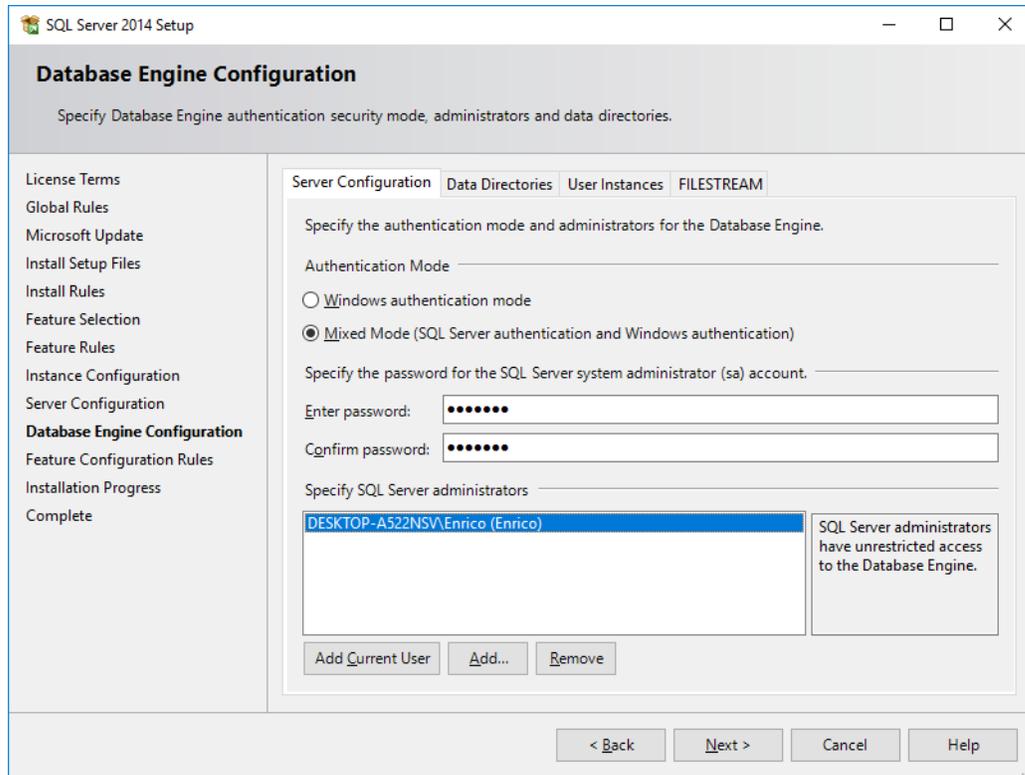
- Other options can be left as default.

6. Open **SQL Server Configuration Manager** and expand **SQL Server Network Configuration.**

7. Select the database server instance name and enable TCP/IP.

8. In Windows Services, set SQL Server to start automatically by setting the **SQL Server Browser** service to **Automatic**.

9. Restart the **SQL Server (QUADRATE)** (or whichever instance name you chose) service.

Enable TCP/IP for SQL Server

Occasionally, TCP/IP is not running on SQL Server. The steps below explain how to start it.

1. Run the SQL Server Configuration Manager by navigating to C:\Windows\System32 and finding the file SQLServerManagerXX.msc. (XX is a SQL Server version, for example, SQLServerManager14.msc.)

2. Double-click on the SQLServerManagerXX.msc file.

3. Expand the SQL Server Network Configuration node(s). Expand both if there are two as shown in the screenshot below.
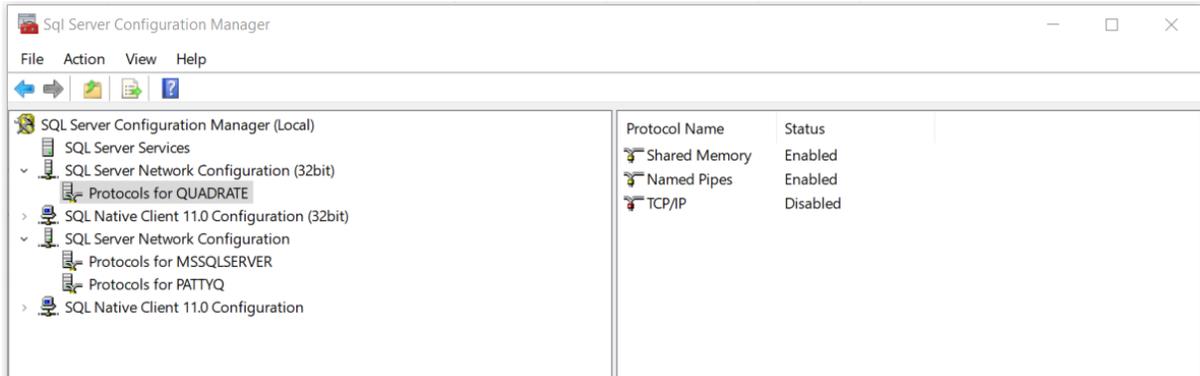
4. Click the SQL Server Instance that is being used for Data Workbench.

5. Right click on the TCP/IP entry on the right side of the screen and choose Enable.
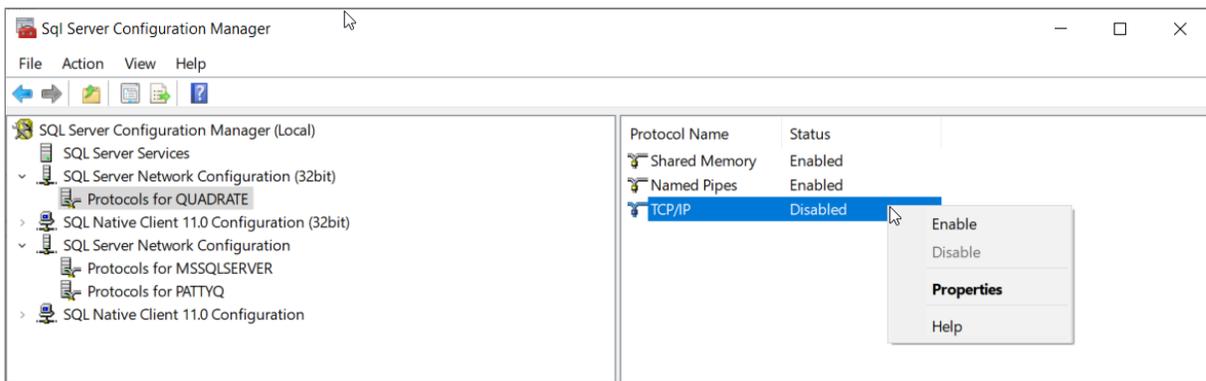
6. Click **OK** in the Warning dialog.

7. Click on the **SQL Server Services** option on the left side of the panel.

8. Right click on the **SQL Server (Quadrate)** or **SQL Server (Custom Name)** and choose **Restart**.
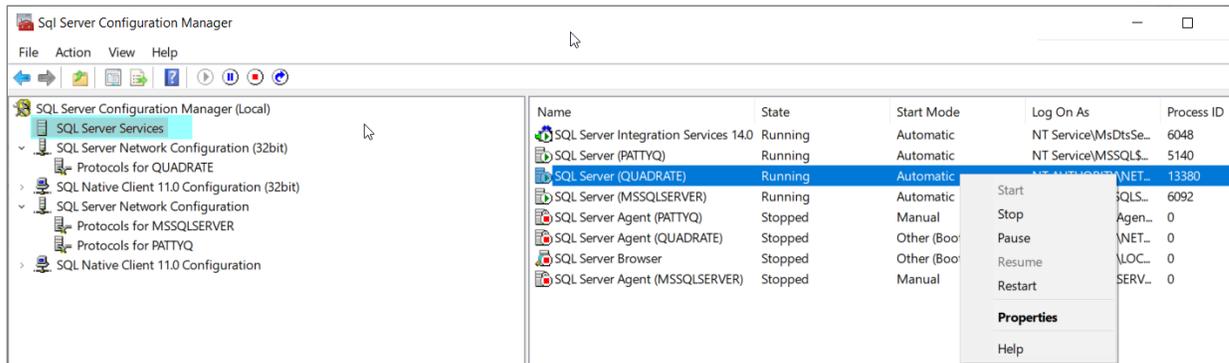
Change Execution Engine Privileges

The Execution Engine service is automatically configured to run under the Local System account. This account does not have sufficient privileges to access files external to the current computer. To allow the service to read and write from network shares and other external locations, the service must be configured to run as a user with the correct privileges. If the current user can access these locations then the current user details can be used.

Communication to the SMTP (Email) server is also performed under the Local System account. This could cause problems where anonymous users do not have permission to send emails outside the company domain. If external email addresses will be used for notification emails, the account for the Execution Engine must be changed to a user that has sufficient privileges to send external emails.

To change the user credentials of the service:

1. Open **Control Panel.**
2. Open **Administrative Tools.**
3. Open **Services**.

4. Double-click the **Quadrate Execution Engine** entry.
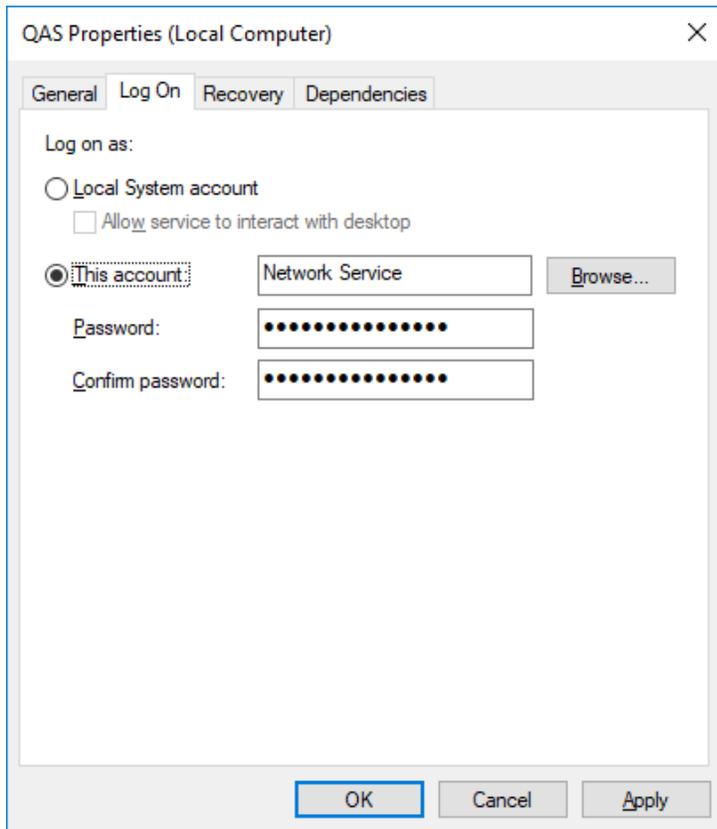
5. Click the **Log On** tab.

6. Select the **This account** option.

7. Enter the new username.

8. Enter and re-enter the password in the **Password** and **Confirm password** text boxes.

9. Click **OK** to close the dialog.

10. In the Services window, right-click the **Quadrate Execution Engine** entry and select **Restart**.

Command Line Options for Setup

The following command line options can be used to edit the batch file created for Client installs or run the DataWorkbenchSetup.exe from the command line. See the Client install section for information on obtaining the DataWorkbenchSetup.exe. These options are not used during a typical installation but can be useful to system administrators.

| Parameter	Description
/CUSTOMDB	Disables installation of the SQL Server Express database allowing you to manually configure and install the database on the server of your choice. It is highly recommended to use the Data Workbench Installation and Upgrade tool whenever possible to automate the process of using a custom database with Data Workbench. Contact the support team via the Help Center with questions.

/QASSERVER=server name	Specifies the name of the server running the Data Workbench Enterprise Server.
/QASPORT=svr_port	Specifies the port that the Enterprise Server is running on. Default is port 3333.
/QEEPORT=ee_port	Specifies the port that the Execution Engine is running on. Default is port 3334.
/EMAILSERVER=smtp_svr	Specifies the SMTP server that the Execution Engine will use for scheduled upload emails.
/SP-	Disables the *This will install... Do you wish to continue?* prompt at the beginning of setup. Has no effect if the DisableStartupPrompt [Setup] section directive was set to yes.
/SILENT, /VERYSILENT	SILENT: wizard and background window are not displayed but installation progress window is. If a restart is necessary and the '/NORESTART' command is not used, a *Reboot now?* message is displayed.
	VERY SILENT: wizard, background window, installation progress window, Reboot now message are not displayed.
	Always displayed: error messages during installation, startup prompt (if not disabled with DisableStartupPrompt or the '/SP-' command line option).
/SUPPRESSMSGBOXES	Suppresses message boxes. Only has an effect when combined with '/SILENT' and '/VERYSILENT'.
	Default response when a choice is offered:
	Yes in a 'Keep newer file?' situation.
	No in a 'File exists, confirm overwrite.' situation.
	Abort in Abort/Retry situations.
	Cancel in Retry/Cancel situations.
	Yes (=continue) in a DiskSpaceWarning/DirExists/DirDoesntExist/NoUninstallWarning/ExitSetupMessage/ConfirmUninstall situation.
	Yes (=restart) in a FinishedRestartMessage/UninstalledAndNeedsRestart situation.
	Five message boxes are not suppressible:
	The About Setup message box.
	The Exit Setup? message box.
	Any (error) message box displayed before Setup (or Uninstall) could read the command line parameters.
	Any message box displayed by [Code] support function MsgBox.
/LOG	Creates a log file in the user's TEMP directory detailing file installation and [Run] actions taken during the installation process. Helpful if you suspect a file is not being replaced when it should be.
	The log file is created with a unique name based on the current date. (It will not overwrite or append to existing files.)

	Log file information is intended for use by administrators and Data Workbench support team. The format of the file is subject to change without notice.
/LOG="filename"	Same as /LOG, except it allows you to specify a fixed path/filename to use for the log file. If a file with the specified name already exists it will be overwritten. If the file cannot be created, setup will abort with an error message.
/NOCANCEL	Prevents the user from cancelling during the installation process, by disabling the Cancel button and ignoring clicks on the Close button. Useful along with '/SILENT' or '/VERYSILENT'.
/NORESTART	Setup does not reboot even when necessary.
/LOADINF="filename"	Loads settings from the specified file after checkingthe command line. This file can be prepared using '/SAVEINF='. **NOTE**: Use quotes if the filename contains spaces.
/SAVEINF="filename"	Saves installation settings to the specified file. **NOTE**: Use quotes if the filename contains spaces.
/LANG=language	Specifies the language to use. *language* specifies the internal name of the language as specified in a [Languages] section entry. When a valid /LANG parameter is used, the *Select Language* dialog will be suppressed.
/DIR="x:\dirname"	Overrides the default directory name displayed on the *Select Destination Location* wizard page. A fully qualified pathname must be specified.
/GROUP="folder name"	Overrides the default folder name displayed on the *Select Start Menu Folder* wizard page. If the [Setup] section directive DisableProgramGroupPage was set to *yes*, this command line parameter is ignored.

Troubleshooting

Unable to Connect to Enterprise Server

Data Workbench Clients have been set up to connect to the server, but when they try to connect, the following error occurs.
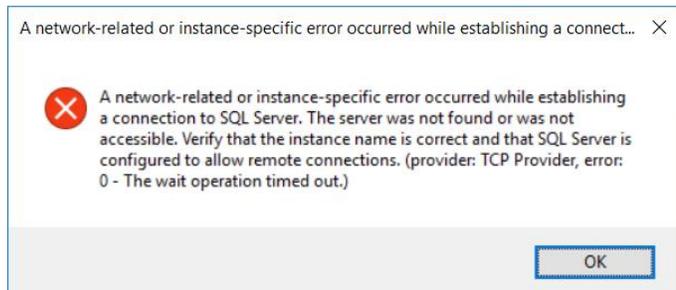
The recommended way to fix this issue is to run the Install Upgrade Tool.

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SQL Server Does Not Allow Remote Connections

If the following error message appears and the Windows firewall is enabled, add exceptions to the firewall to allow communication to the database from other computers.

An error has occurred while establishing a connection to the server. When connecting to SQL Server, this failure may be caused by the fact that under the default settings SQL Server does not allow remote connections.

If you are running a firewall on the computer that is running SQL Server, external connections to SQL Server will be blocked unless SQL Server and the SQL Server Browser service can communicate through the firewall. You must create an exception for each instance of SQL Server that you want to accept remote connections and an exception for the SQL Server Browser service.

Create Exceptions in Windows Firewall

These steps apply to Windows Defender Firewall. If you are using a different firewall system, see your firewall documentation for more information.

1-Find the SQL Server Instance ID

1. SQL Server uses an instance ID as part of the path when you install the program files. To create an exception for each instance of SQL Server, identify the correct instance ID.

2. Open the SQL Server Configuration Manager.

3. Right-click SQL Server Browser, and choose **Properties**.

4. On the *SQL Server Browser Properties* page, click the **Advanced** tab.

5. Locate and make a note of the instance ID in the property list.

6. Click **OK**.

2-Create an Exception for SQL Server in Windows Firewall

1. Open Windows Firewall.

2. Click **Allow an app or feature through Windows firewall**.

3. If needed, click **Change settings** in the next page.

4. Click **Allow another app…** in the bottom right corner.

5. Click **Browse** to navigate to **C:\Program Files (x86)\Microsoft SQL Server\MSSQL12.QUADRATE\MSSQL\Binn\sqlservr.exe** or wherever the SQL Server executable resides. MSSQL12.QUADRATE is a placeholder for the instance ID that you obtained in step 1 above.

6. Click **Open**.

7. Click **OK**.

   NOTE: Paths may be different depending on where SQL Server is installed..

8. Repeat steps 1 through 7 for each instance of SQL Server that needs an exception.

3-Create an Exception for the SQL Server Browser Service in Windows Firewall

1. Open Windows Firewall.

2. Click Allow an app or feature through Windows firewall.

3. If needed, click **Change settings** in the next page.

4. Click **Allow another app…** in the bottom right corner.

5. Click Browse to navigate to C:\Program Files\Microsoft SQL Server\90\Shared\sqlbrowser.exe.

6. Click **Open**.

7. Click **OK**.

NOTE: Paths may be different depending on where SQL Server is installed.

Clients Unable to Connect – SQL Server Browser Service

The SQL Server Browser service must be running on the system where SQL Server is running. To start the service:

1. In the Windows Services tool, locate the SQL Server Browser service.

2. Right-click on the service and choose **Properties**.

3. Change **Startup Type** from **Disabled** to **Automatic**.
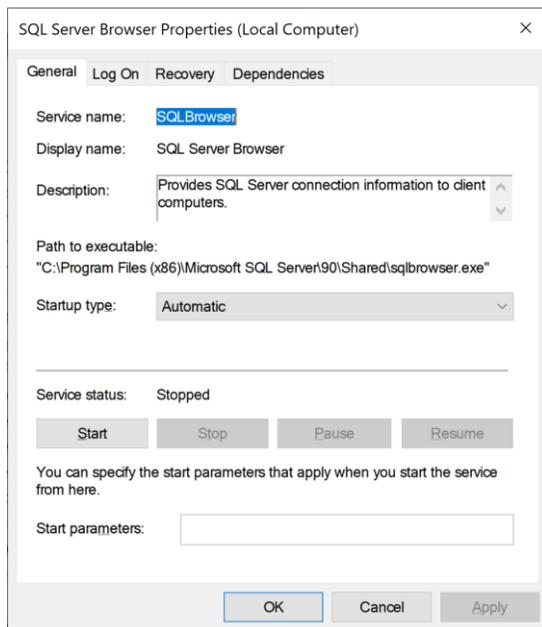
4. Click **Apply**.

5. Click **Start**.

6. Click **OK**.

7. If the client still cannot connect to the SQL Server instance, choose the repair option and select option 2.

Last Updated: June 8, 2021