Data Workbench

Quadrate SOFTWARE
A Division of BackOffice Associates, LLC

Data Workbench Installation Guide

Installation Manual

Version 2

07/22/2011

Document History

Version	Author	Date	Reviewer	Date	Approver	Date	Comments
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Overview

This document describes in detail how to install Quadrate's Data Workbench Software. There are two installation types, Stand Alone and Enterprise, both installation types are described in this document.

System Requirements

- 600-megahertz (MHz) Pentium III-compatible or faster processor; 1-gigahertz (GHz) or faster processor recommended
- 192 megabytes (MB) of RAM or more; 512 megabytes (MB) or more recommended
- Approximately 350 MB of available hard-disk space for the recommended installation
- Super VGA (800 x 600) or higher-resolution video adapter and monitor
- Keyboard and Microsoft Mouse or compatible pointing device
- Supported Operating Systems:
  - Windows XP with Service Pack 2 or later
  - Windows Server 2003 Standard, Enterprise, or Datacenter editions with Service Pack 1 or later
- Required pre-requisites:
  - Windows Installer version 3.1 or later
  - MDAC Components 2.8 SP1 or later
  - .NET Framework version 2.0 SP2

Installation

Choosing the Installation Type

ERP² can be installed in a variety of ways depending on the user's environment, the number of users and the license types.

The standalone installation installs the application and all required components on a single machine. 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.

The enterprise installation is best suited for multiple users within an organization and will enable the following features:

- Centralized security
- Easy sharing of templates and upload mappings
- Centralized scheduling engine

Performing a Stand Alone Installation

1. Run the installation application (e.g. **DataWorkbenchSetup.exe**).
2. Click **Next** on the *Welcome* page.
3. Read through the end-user license agreement and click the **I accept the agreement** radio button and then the **Next** button if you accept the agreement. If you do not accept the agreement, please click the **Cancel** button to exit the installation procedure.

NOTE: If you select Cancel, ERP² will not be installed or usable.

4. Read through the Installation Type Information screen. Click the **Next** button to continue.
5. On the **Select Components** section (see figure 1), accept the default value of **Stand Alone Installation** and click the **Next** button.

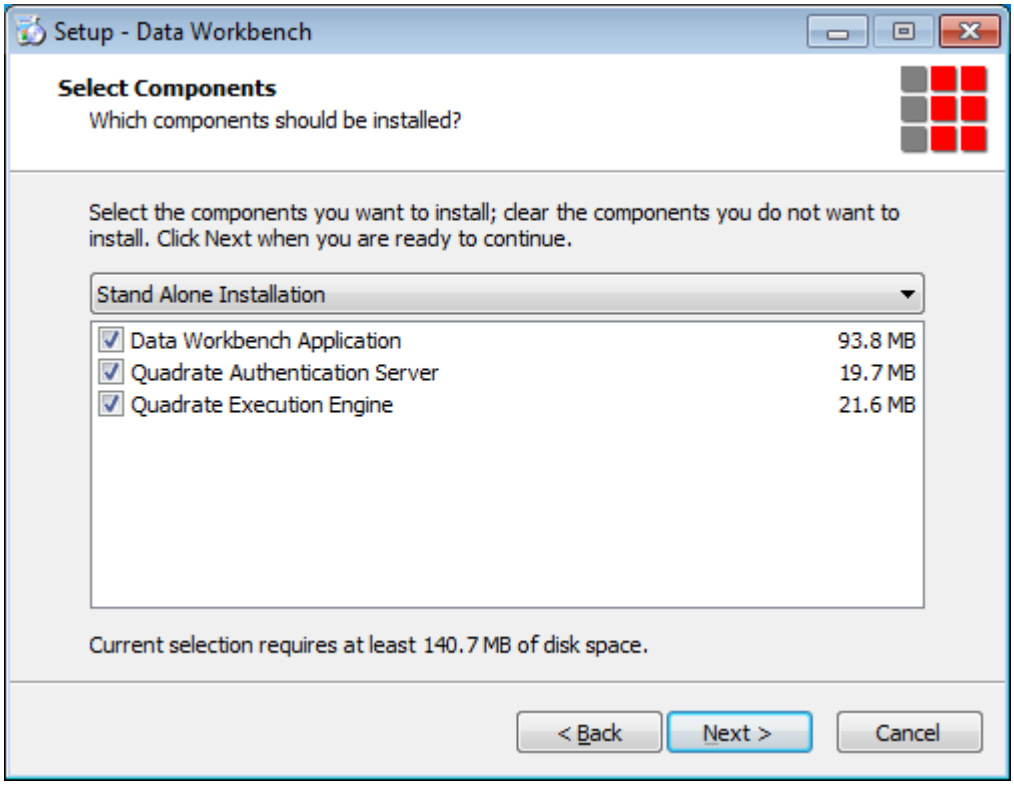


Figure 1

The final section of the installation (see Figure 2) will show what required components will also be installed. The components that may be installed are listed below:

.NET Framework:

The .NET Framework is a Microsoft component that provides the development platform upon which the Data Workbench has been developed.

SQL Express:

SQL Express is a Microsoft database engine that is used for storage of templates, upload mappings, logs and other system information.

6. Click the **Install** button; this will install any of the required components and the Data Workbench application.
7. Once the installation is completed a section stating that the installation has completed will be displayed. Click the **Finish** button to exit the installer.

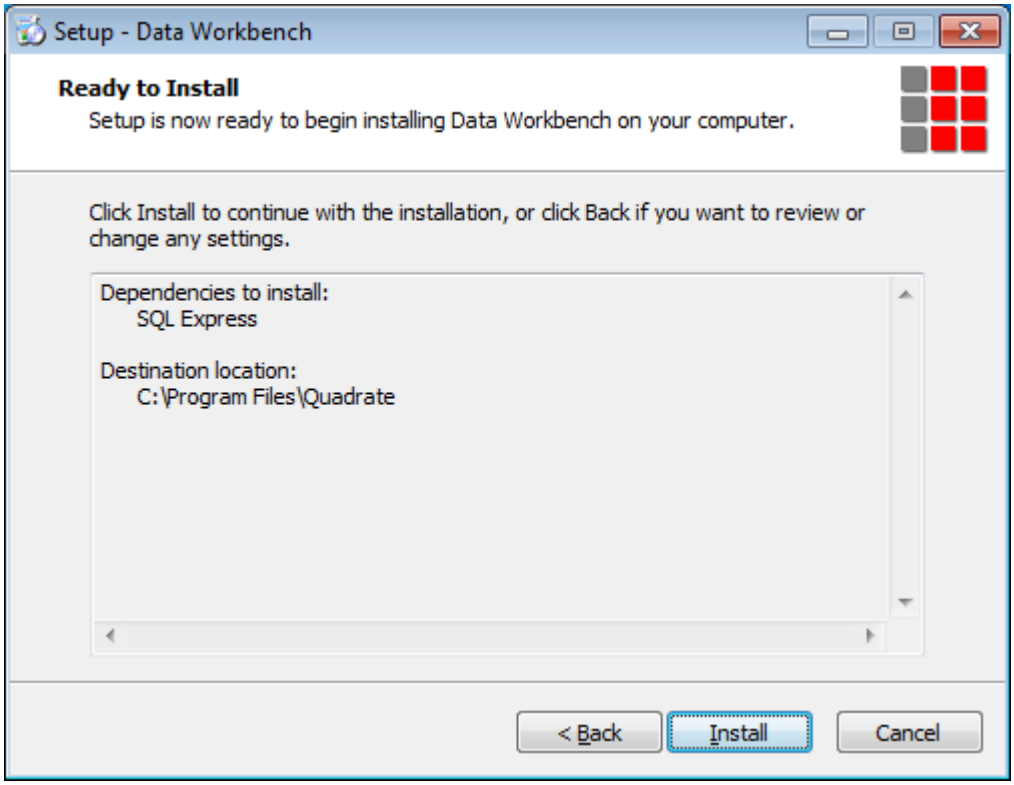


Figure 2

Performing an Enterprise Installation

Server Installation

The following steps should be followed if a dedicated machine will be used to host the server components of the Data Workbench. If one of the users will host the server components then that user should follow the *Stand Alone Installation Guide* and all other users should follow the Client Installation section.

1. Run the installation application (e.g. **DataWorkbenchSetup.exe**).
2. Click **Next** on the *Welcome* page**.**
3. Read through the end-user license agreement and click the **I accept the agreement** radio button and then the **Next** button if you accept the agreement. If you do not accept the agreement, please click the **Cancel** button to exit the installation procedure.

NOTE: If you select Cancel, ERP² will not be installed or usable.

4. Read through the Installation Type Information screen. Click the **Next** button to continue.
5. On the *Select Components* section (see figure 3), select **Enterprise Server Installation** from the drop down list and click the **Next** button.

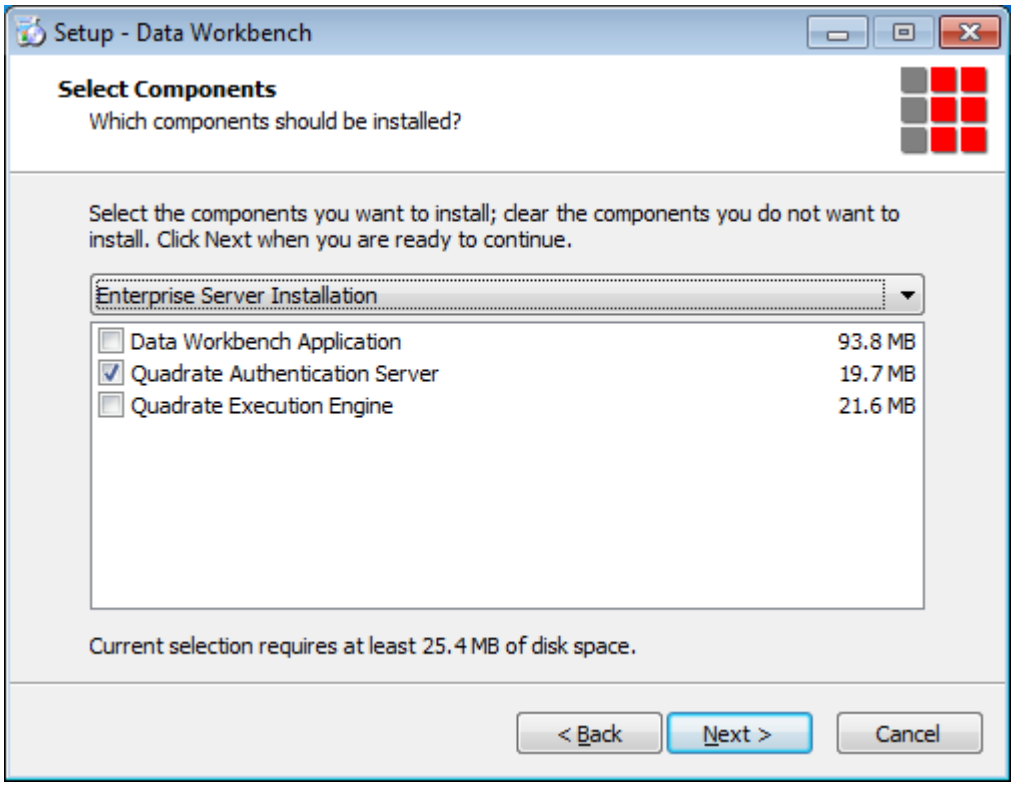


Figure 3

The final section of the installation (see Figure 4) will show what required components will also be installed. The components that may be installed are listed below:

.NET Framework:

The .NET Framework is a Microsoft component that provides the development platform upon which the Data Workbench has been developed.

SQL Express:

SQL Express is a Microsoft database engine that is used for storage of templates, upload mappings, logs and other system information.

6. Click the **Install** button; this will install any of the required components and the Data Workbench application.
7. Once the installation is completed a section stating that the installation has completed will be displayed. Click the **Finish** button to exit the installer.

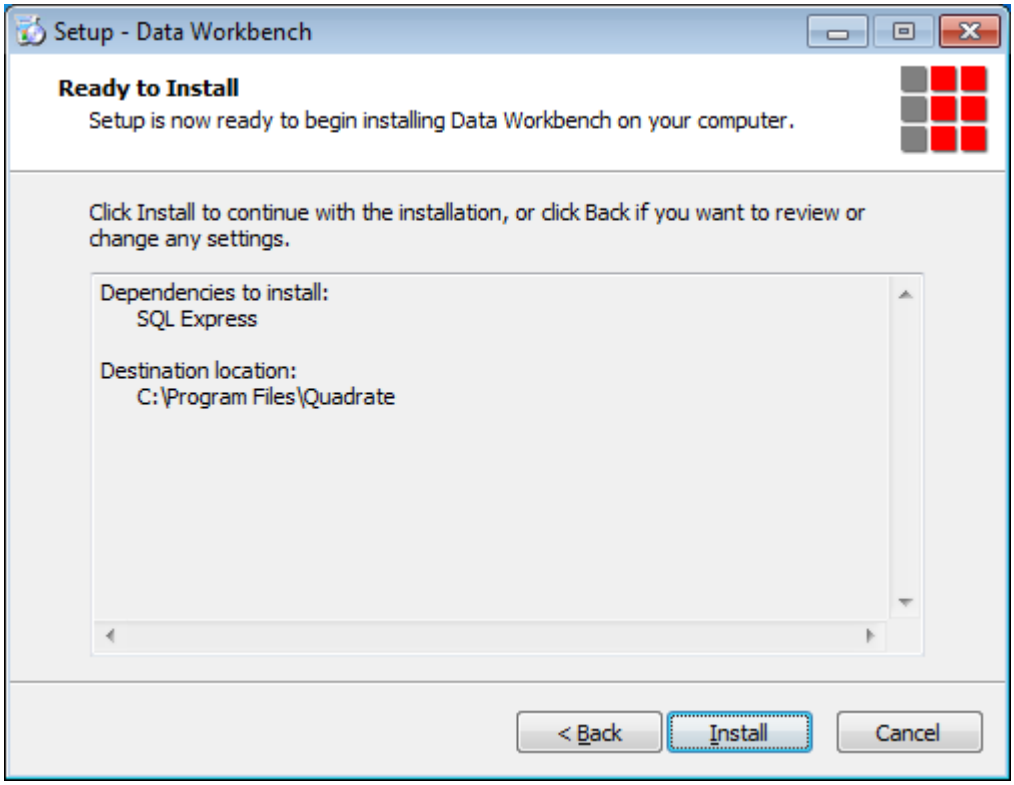


Figure 4

Client Installation

The following installation steps should be used for clients that will be connecting to server components that have been installed on a separate machine.

1. Run the installation application (e.g**. DataWorkbenchSetup.exe**).
2. Click **Next** on the *Welcome* page.
3. Read through the end-user license agreement and click the **I accept the agreement** radio button and then the **Next** button if you accept the agreement. If you do not accept the agreement, please click the **Cancel** button to exit the installation procedure.

NOTE: If you select Cancel, ERP² will not be installed or usable.

4. Read through the Installation Type Information screen. Click the **Next** button to continue.
5. On the *Select Components* section (see figure 5), select **Enterprise Client Installation** from the drop down list and click the **Next** button.

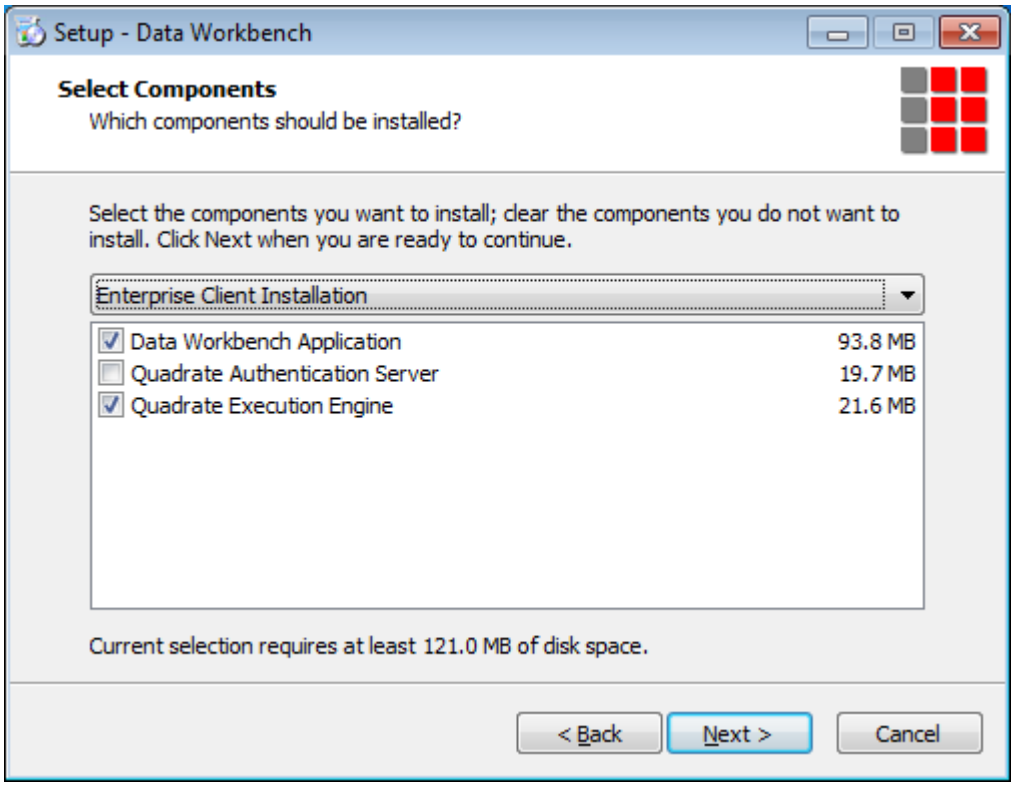


Figure 5

The *Enterprise Server Setup* section (see Figure 6) is where the details of the Enterprise Server are entered.

6. Enter the name or IP address of the computer that is hosting the server components in the **Server Name** text box. If the port of the enterprise server was changed during the server installation process, the new port number must be entered in the **Port** text box. Click the **Next** button once both the name and port have been entered.

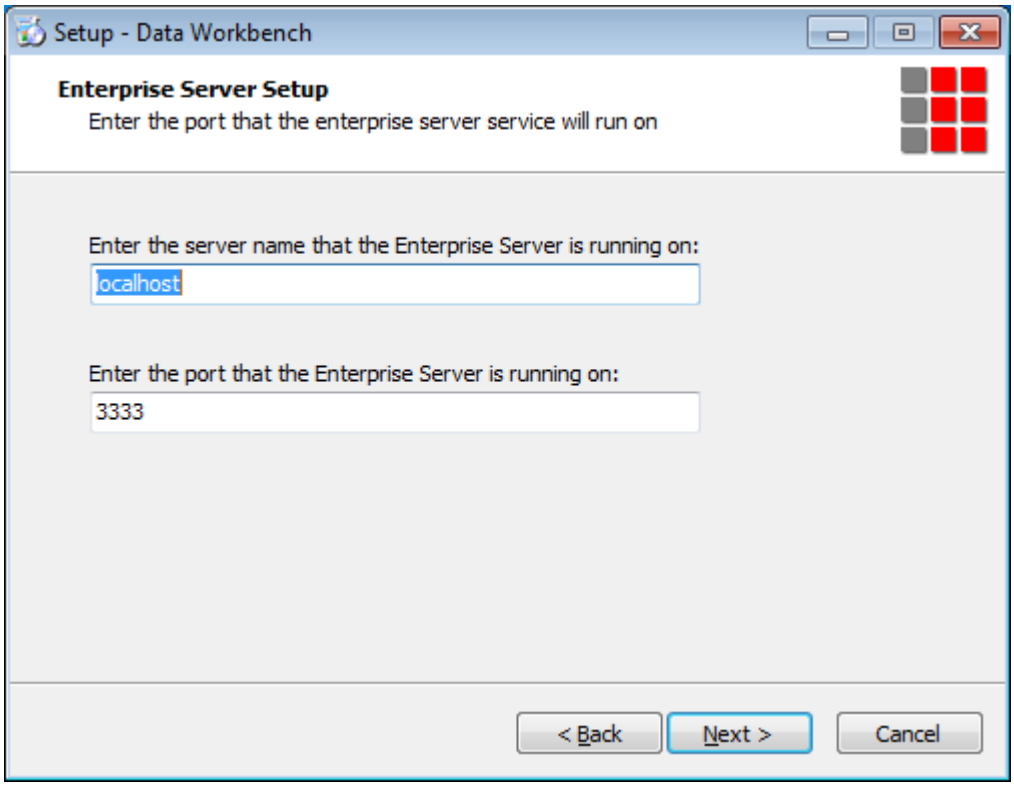


Figure 6

The final section of the installation (see Figure 7) will show what required components will also be installed. The components that may be installed are listed below:

.NET Framework:

The .NET Framework is a Microsoft component that provides the development platform upon which the Data Workbench has been developed.

7. Click the **Install** button; this will install any of the required components and the Data Workbench application.
8. Once the installation is completed a section stating that the installation has completed will be displayed. Click the **Finish** button to exit the installer.

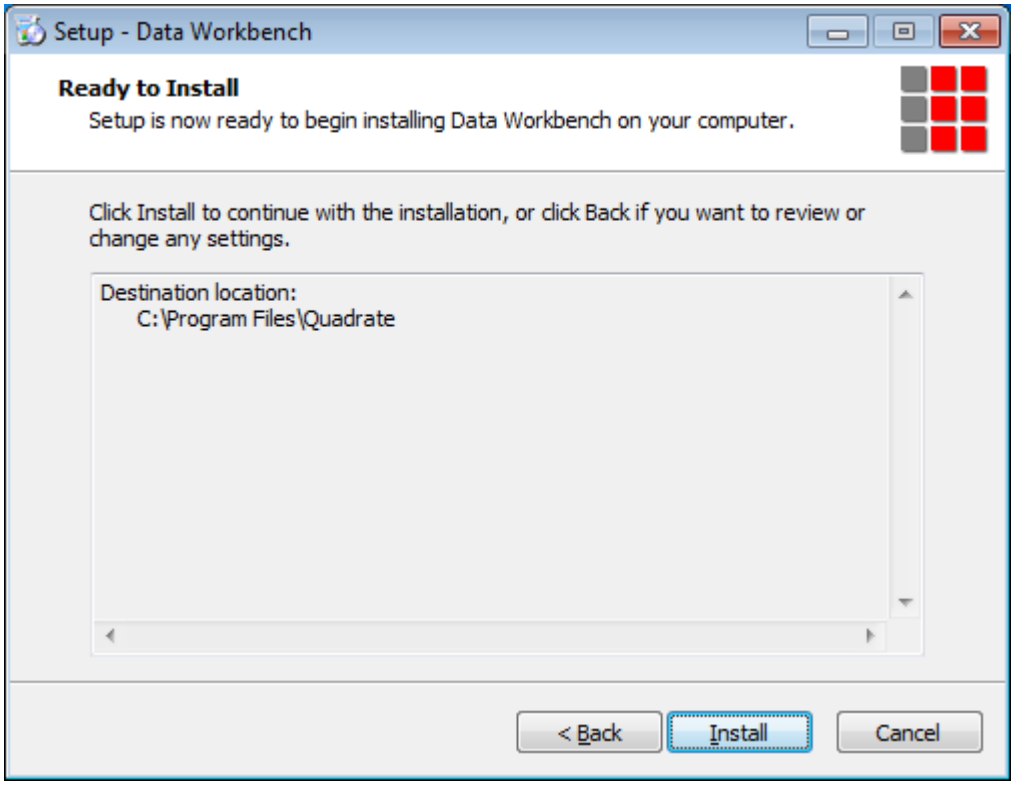


Figure 7

Activating Data Workbench

When Data Workbench requires activation an Activation Wizard will be displayed when the Data Workbench Client is run. This wizard allows you to activate the product in one of two ways.

a. Online Activation

b. License File Activation

Online Activation

1. Enter the Product Code into the text box on the first screen of the Activation Wizard (See figure 8).

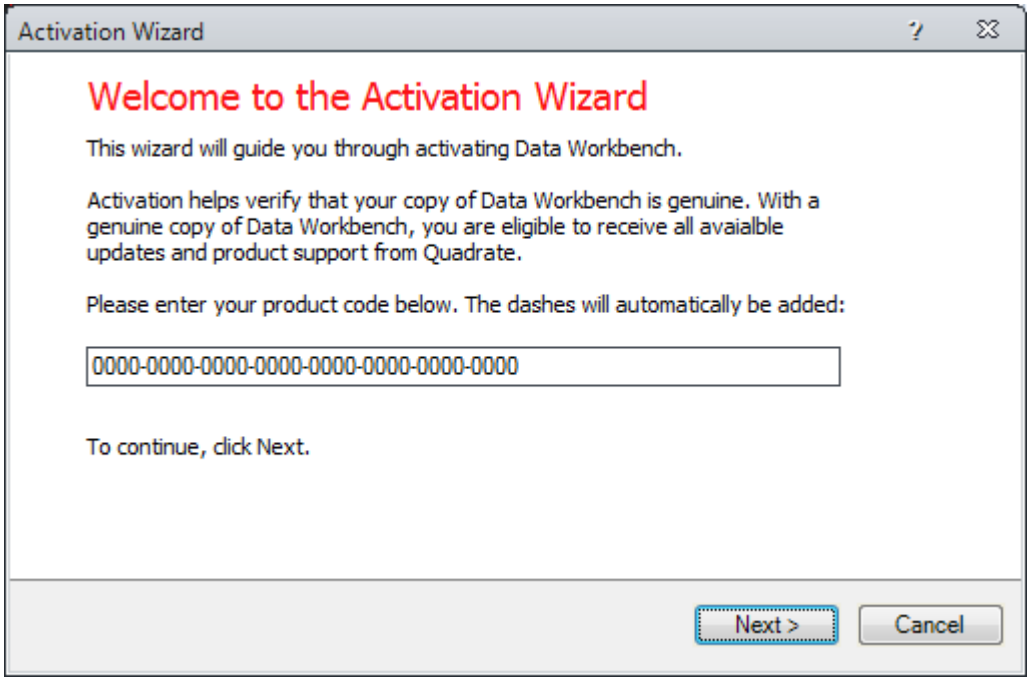


Figure 8

2. Select the **Activate Online** radio button and click the **Next** button (See figure 9).

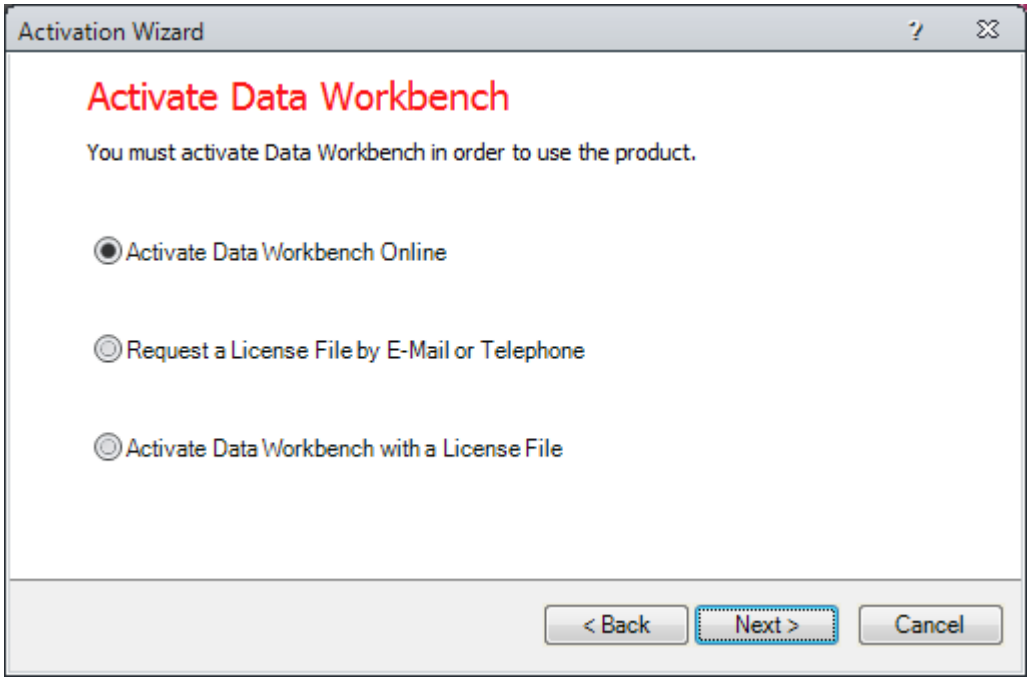


Figure 9

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

3. After Online Activation has finished click the **Finish** button.

Offline Activation

1. Enter the **Product Code** into the text box on the first screen of the Activation Wizard (See Figure 8).
2. Select the second option: **Request a License File by E-Mail or Telephone** radio button. Click the **Next** button to continue (See Figure 9).
3. Click the **Click here to request a license file by e-mail** link. This link will bring up your e-mail client with a message ready to send to Quadrate. When the message appears in your email client, click the send button.

NOTE: If an email does not get created automatically, follow the instructions from the **License File Requested** screen which will explain how to manually compose an activation email to send to Quadrate. Alternatively you may call Quadrate and give them the key that is displayed at the bottom of the screen (See Figure 10).

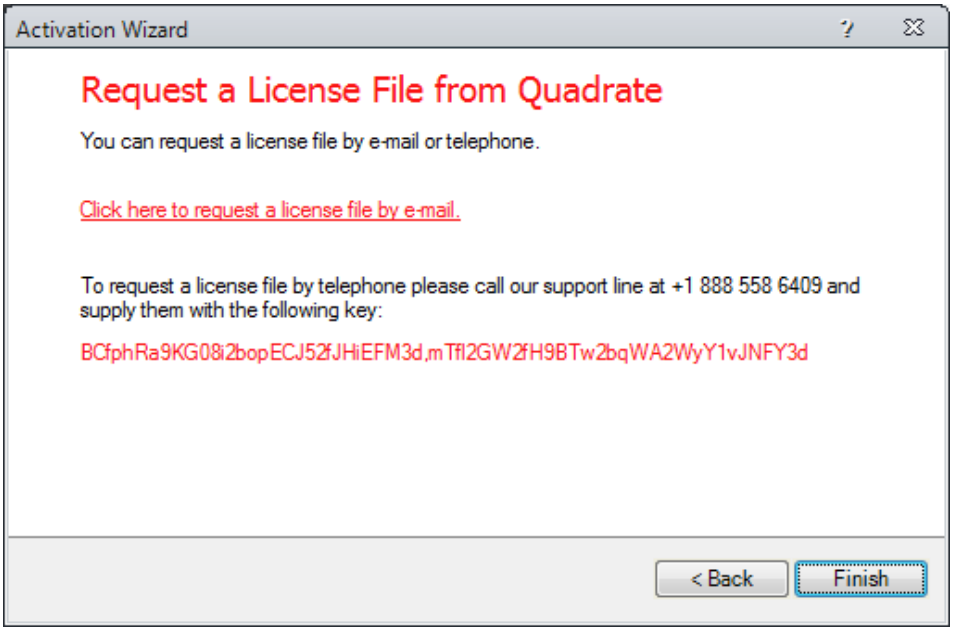
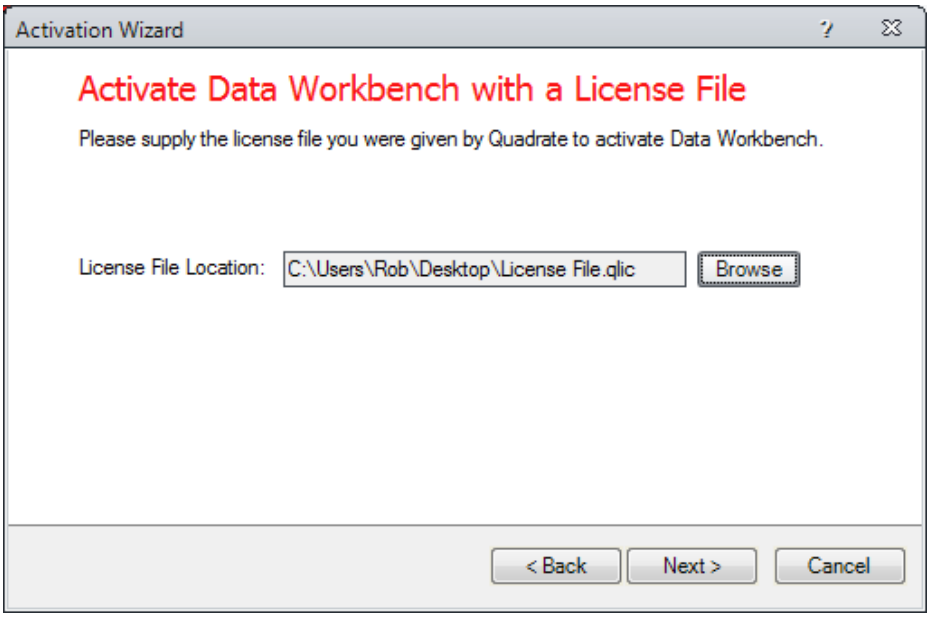


Figure 10

4. Click the **Finish** button and wait for the response e-mail with your license.
5. Once the license file is received save the attached QLIC file to your desktop and start Data Workbench again.
6. Enter the Product Code into the text box on the first screen of the Activation Wizard.
7. Select the **Activate Data Workbench with a License File** radio button. Click the **Next** button to continue.
8. Select the **Browse** button shown in Figure 11 to locate the file that was saved in step 4.2.5. Click the **Next** button to continue.



File Location

9. After the activation process is complete click the **Finish** button.

Performing Initial Application Configuration

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 ERP². The default usernames and passwords can be configured in the administration section after a logon has been made. The default username and password is as follows:

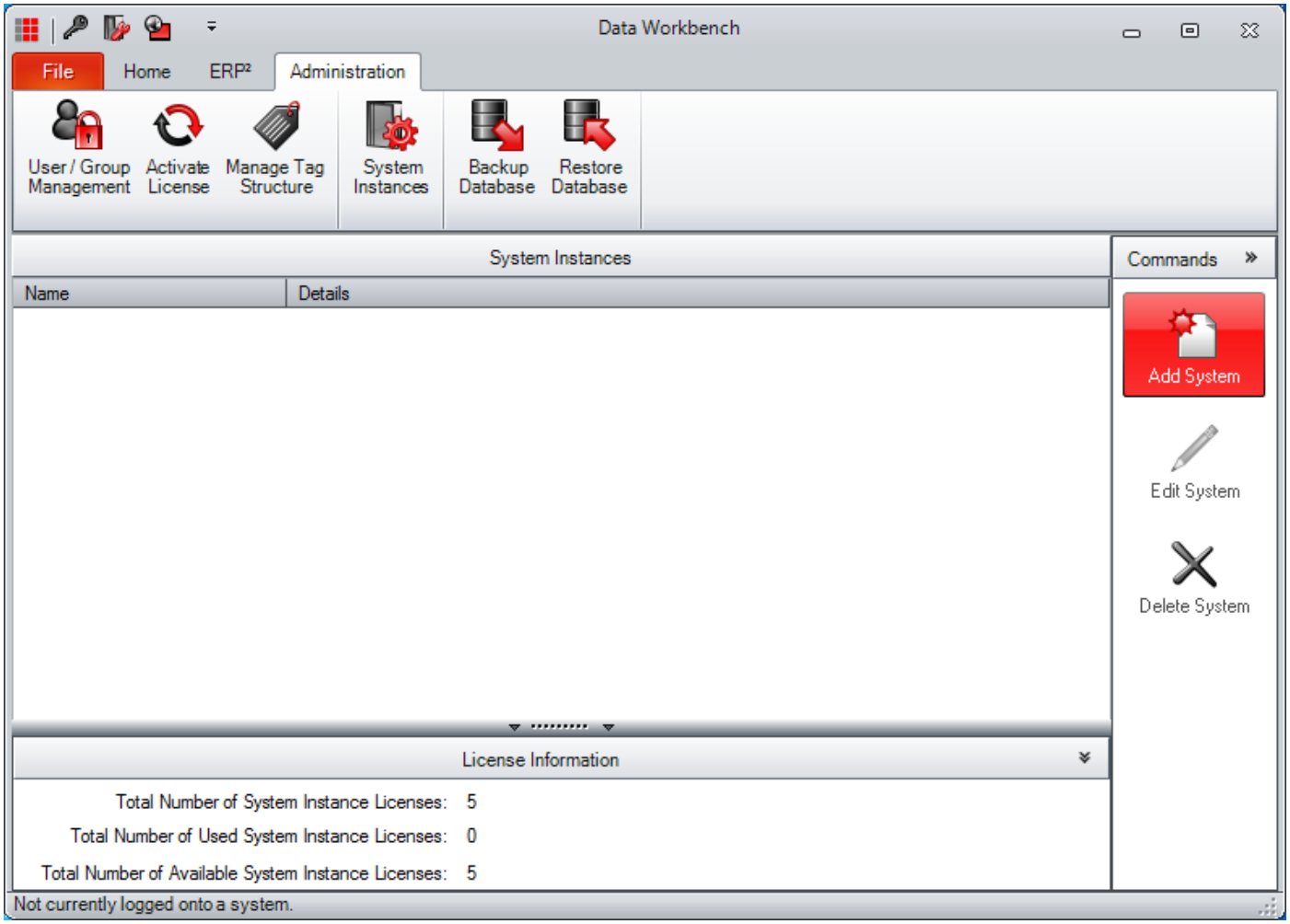
Username	admin
Password	admin

Adding SAP Systems

Each SAP system that will be accessed via ERP² must first be added into System Instance section of the application. If the application was installed in an enterprise configuration, the systems will only need to be added once and will automatically be shared amongst the other users. For security measures, users are not automatically allowed to logon to any system in the system instance list. The administrator must first go into the user security section and select which systems the user has access to.

To add system instances:

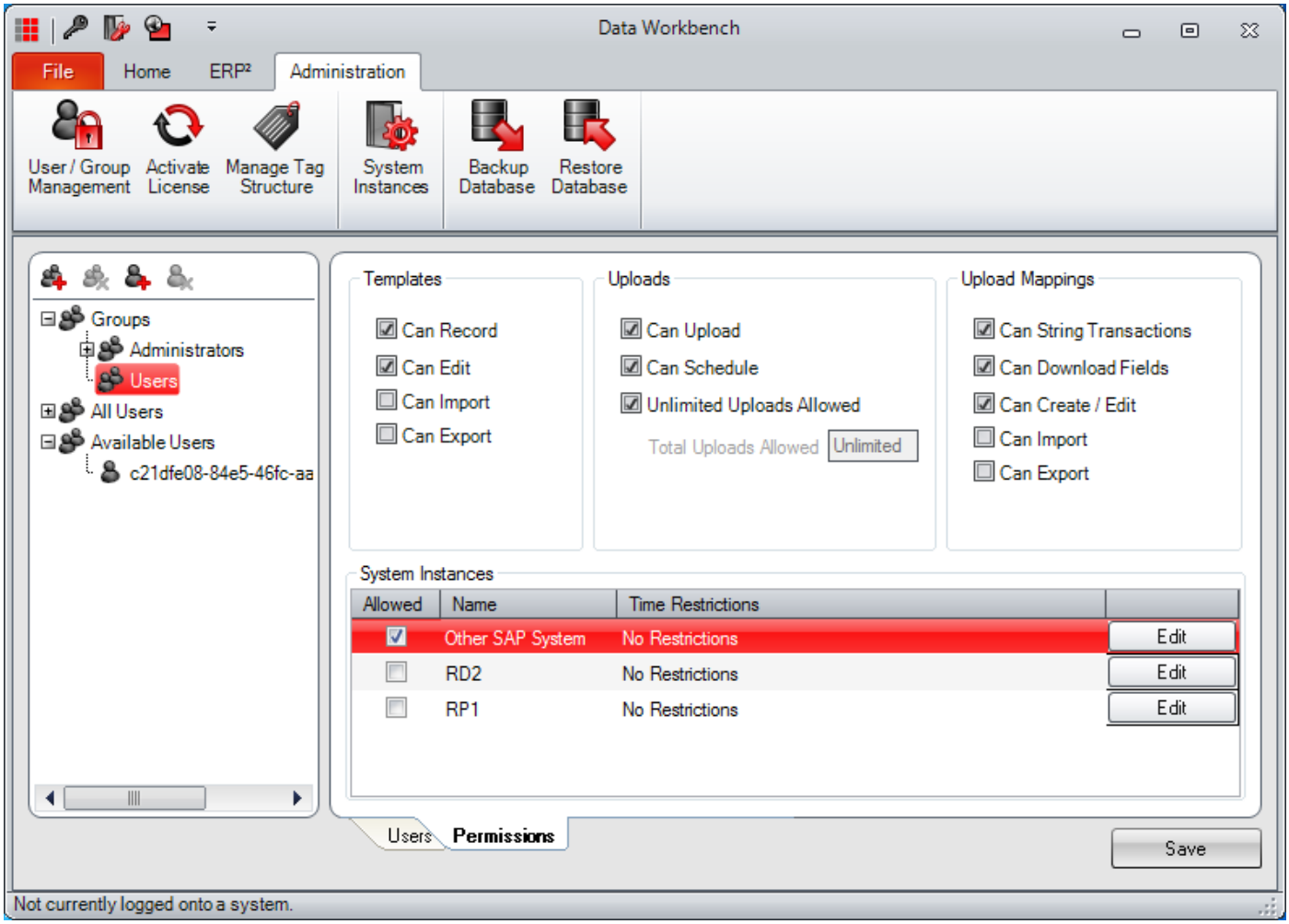
1. Open ERP² and log on using default username and password.
2. Click on the **Administration** tab.
3. Click the **Systems** button.
4. Click the **Add System** command (See Figure 12).
5. Select from your list of SAP connections.
6. Click **OK.**



Add SAP Systems

To grant access to a system:

1. From the **Administration** tab, click the **Manage User Security** icon.
2. Drill down and select the relevant user.
3. Select the **Permissions** tab.
4. Use the **Allowed** checkbox to grant or deny access to each system (See Figure 13).
5. Click the **Save** button to save changes.



Security Section

Additional Execution Engine Setup

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. In order 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 should 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. Locate the Quadrate Execution Engine service.
5. Double-click the **Quadrate Execution Engine** entry.
6. Click on the **Log On** tab. (See Figure 14).
7. Select the **This account** radio button.
8. Enter the new username in the first text box adjacent to the **This account** radio button.
9. Enter and re-enter the password in the **Password** and **Confirm password** text boxes.
10. Click the **OK** button.
11. Right-click the **Quadrate Execution Engine** entry and select the **Restart** option.

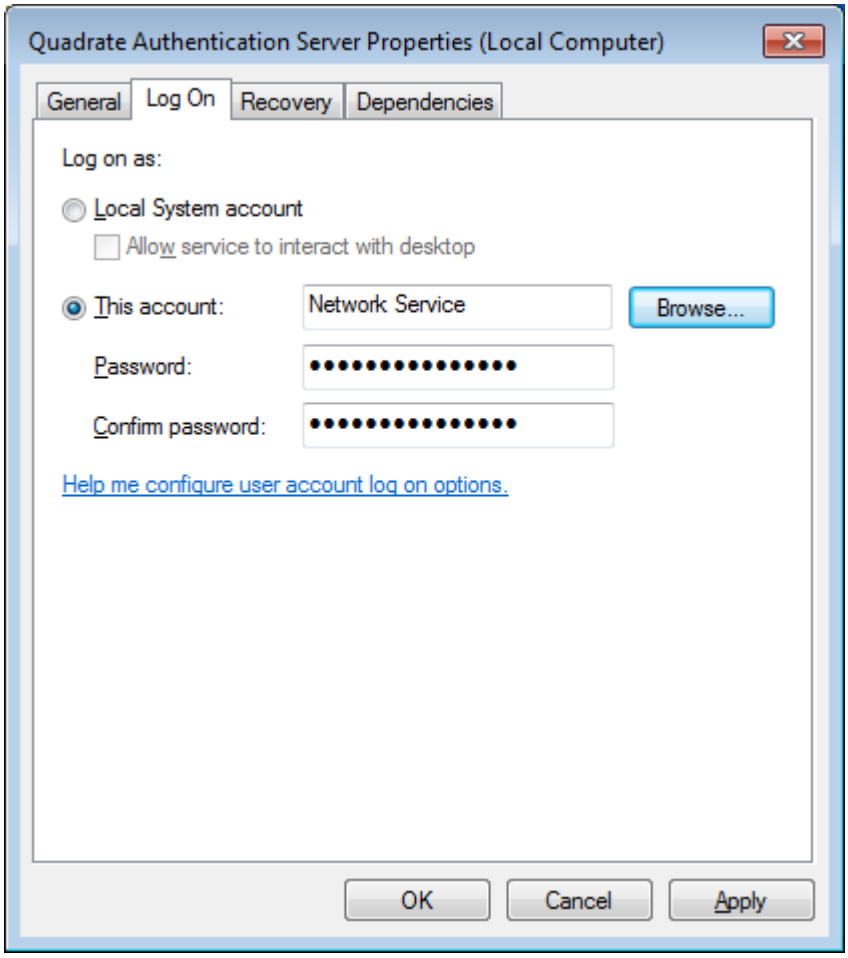


Figure 14

Additional Configuration for SQL Express Security

If the following error message appears and the Windows firewall is enabled, please follow these steps to 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 2005, this failure may be caused by the fact that under the default settings SQL Server does not allow remote connections.

Create exceptions in Windows Firewall

These steps apply to the version of Windows Firewall that is included in Windows XP Service Pack 2 (SP2), Windows Server 2003 and Windows Vista. If you are using a different firewall system, see your firewall documentation for more information.
If you are running a firewall on the computer that is running SQL Server 2005, external connections to SQL Server 2005 will be blocked unless SQL Server 2005 and the SQL Server Browser service can communicate through the firewall. You must create an exception for each instance of SQL Server 2005 that you want to accept remote connections and an exception for the SQL Server Browser service.

SQL Server 2005 uses an instance ID as part of the path when you install its program files. To create an exception for each instance of SQL Server, you must identify the correct instance ID.

To obtain an instance ID, follow these steps:

1. Click Windows *Start* menu, point to **Programs**, point to **Microsoft SQL Server 2005**, point to **Configuration Tools**, and then click **SQL Server Configuration Manager**.
2. In *SQL Server Configuration Manager*, click the **SQL Server Browser** service in the right pane, right-click the instance name in the main window, and then click **Properties**.
3. On the *SQL Server Browser Properties* page, click the **Advanced** tab, locate the instance ID in the property list, and then click **OK**.
4. To open Windows Firewall, click **Start**, click **Run**, type **firewall.cpl**, and then click **OK**.

Create an exception for SQL Server 2005 in Windows Firewall

To create an exception for SQL Server 2005 in Windows Firewall, follow these steps:

1. In *Windows Firewall*, click the **Exceptions** tab, and then click **Add Program**.
2. In the *Add a Program* window, click **Browse**.
3. Click the **C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Binn\sqlservr.exe** executable program, click **Open**, and then click **OK**.

NOTE: The path may be different depending on where SQL Server 2005 is installed. MSSQL.1 is a placeholder for the instance ID that you obtained in step 3 of the previous procedure.

4. Repeat steps 1 through 3 for each instance of SQL Server 2005 that needs an exception.

Create an exception for the SQL Server Browser service in Windows Firewall

To create an exception for the SQL Server Browser service in Windows Firewall, follow these steps:

1. In *Windows Firewall*, click the **Exceptions** tab, and then click **Add Program**.
2. In the *Add a Program* window, click **Browse**.
3. Click the **C:\Program Files\Microsoft SQL Server\90\Shared\sqlbrowser.exe** executable program, click **Open**, and then click **OK**.

NOTE: The path may be different depending on where SQL Server 2005 is installed.

Command Line Options

The Setup program accepts optional command line parameters. These can be useful to system administrators, and to other programs calling the Setup program.

/CUSTOMDB

Disables the installation of the SQL Express database allowing you to manually configure and install the database on the server of your choice. If you choose this option Quadrate will need to send you the database installation scripts.

/QASSERVER=server name

Allows the user to specify the name of the server that is running the Quadrate Enterprise Server.

/QASPORT=server port

Specifies the port that the Enterprise Server is running on. By default it runs on port 3333.

/QEEPORT=execution engine port

Specifies the port that the Execution Engine is running on. By default it runs on port 3334.

/EMAILSERVER=smtp server

Specifies the SMTP server that the Quadrate Execution Engine will send e-mails through for scheduled uploads.

/SP-

Disables the *This will install... Do you wish to continue?* prompt at the beginning of Setup. Of course, this will have no effect if the DisableStartupPrompt [Setup] section directive was set to yes.

/SILENT, /VERYSILENT

Instructs Setup to be silent or very silent. When Setup is silent the wizard and the background window are not displayed but the installation progress window is. When a setup is very silent this installation progress window is not displayed. Everything else is normal so for example error messages during installation are displayed and the startup prompt is (if you haven't disabled it with DisableStartupPrompt or the '/SP-' command line option explained above).

If a restart is necessary and the '/NORESTART' command isn't used (see below) and Setup is silent, it will display a *Reboot now?* message box. If it's very silent it will reboot without asking.

/SUPPRESSMSGBOXES

Instructs Setup to suppress message boxes. Only has an effect when combined with '/SILENT' and '/VERYSILENT'.

The default response in situations where there's a choice is:

- 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.

- 5 message boxes are not suppressible:
- The About Setup message box.
- The Exit Setup? message box.
- The FileNotInDir2 message box displayed when Setup requires a new disk to be inserted and the disk was not found.
- 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

Causes Setup to create a log file in the user's TEMP directory detailing file installation and [Run] actions taken during the installation process. This can be a helpful debugging aid. For example, if you suspect a file isn't being replaced when you believe it should be (or vice versa), the log file will tell you if the file was really skipped, and why.

The log file is created with a unique name based on the current date. (It will not overwrite or append to existing files.)

The information contained in the log file is technical in nature and therefore not intended to be understandable by end users. Nor is it designed to be machine-parseable; 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

Instructs Setup not to reboot even if it's necessary.

/LOADINF="*filename*"

Instructs Setup to load the settings from the specified file after having checked the command line. This file can be prepared using the '/SAVEINF=' command as explained below. Don't forget to use quotes if the filename contains spaces.

/SAVEINF="*filename*"

Instructs Setup to save installation settings to the specified file.

Don't forget to 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

Trace Files

If there is an error that occurs in any of the three components (Data Workbench, The Quadrate Authentication Server or the Quadrate Execution Engine), the errors are logged in the component's individual trace file. When troubleshooting errors, viewing the trace files is important because any underlying exceptions may be logged and displayed in the trace files which can be helpful in determining the cause of the problem.

To view any of the trace files follow these instructions:

1. Open the *Diagnostic and Configuration Utility* located in **C:\Program Files\Quadrate\DataWorkbench\DiagnosticUtility.exe**. It is also available in the Windows *Start* menu under **Quadrate\DataWorkbench**.
2. Click on the **View Trace Files** button.
3. The drop down list labeled **Trace Files** allows you to select any of the trace files that have been generated.
4. The textbox labeled **Trace File Location** shows the path where the trace file is located.
5. From there, you can browse to the path and open from a text editor such as notepad or press the **Copy File to Clipboard** button which allows you to paste into a text editor.

Trace File Default Locations

Data Workbench	%APPDATA%\Quadrate\dataworkbenchtrace.txt
Quadrate Authentication Server	%PROGRAMFILES%\Quadrate\QAS\trace.txt
Quadrate Execution Engine	%PROGRAMFILES%\Quadrate\QEE\qeetrace.txt

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