



Syniti Data Workbench

Upgrade Guide

Version 10.0

Software Release Date: 10/9/20



<https://support.quadrate.com>

Document History

Version	Author	Date	Reviewer	Date	Comments
1	JHLorenzin	10/7/20	PConrad	9/21/20	New install guide for upgrades only

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Syniti Data Workbench

Overview

Syniti Data Workbench 10.0 introduces a robust version of Data Workbench with a new look and feel, and the ability to download data from SAP in addition to the existing features to upload data to SAP. For a complete list of changes in Syniti Data Workbench 10.0, check the release notes in the [Help Center](#).

This document provides step-by-step instructions for current Data Workbench users to **upgrade and activate Syniti Data Workbench**. For Data Workbench 10.0, most users will run the new Install Upgrade Tool which takes care of creating a backup of the QAS database used by Data Workbench, uninstalling the current Data Workbench version, then installing Data Workbench 10. See [Upgrade Options](#) below.

Alternatively,

- Use the *Syniti Data Workbench Install Guide* available in the download package **SynitiDataWorkbench_10.0.x_Automatic_Install_Upgrade.zip** or in the [Help Center](#) if you are installing Data Workbench for the first time.
- Use the *Syniti Data Workbench Manual Install Guide* available in the manual download package **SynitiDataWorkbench_10.0.x_Manual_Install.zip** or in the [Help Center](#) if you are using the DataWorkbenchSetup.exe file to install/upgrade Data Workbench.
- See the section [Upgrade Data Workbench and SQL Server](#) in this guide if you would like to upgrade both Data Workbench and SQL Server.

If you encounter difficulties during installation, be sure to [contact support](#) via the [Help Center](#) for assistance.

Data Workbench 10.0 New Download Feature

Data Workbench 10.0 offers a feature to download data from SAP. You can find out more about this feature from the [User's Guide](#), now available online. The download feature is available to all Data Workbench 9.x users who have a current annual maintenance for Data Workbench. However, the download feature is not enabled by default and requires a new license. Contact the technical support team via the [Help Center](#) if you would like to enable this feature.

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 for systems where the Data Workbench interface will be used to connect to SAP.
NOTE: If the SAP GUI is not installed, you will not be able to complete Data Workbench installation.

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- Microsoft SQL Server Express or Microsoft SQL Server 2014 or later with Windows Authentication enabled.
- .NET Framework 4.5 or later

.NET Framework Versions

Both the Install and Upgrade tool and Data Workbench require .NET Framework 4.5 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 be asked to install .NET Framework 4.5 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 uses your existing installation of Microsoft SQL Server. If you would like to install a different SQL Server version for use with Data Workbench, see the section [Upgrade Data Workbench and SQL Server](#) in this guide. It is highly recommended that a database administrator perform any custom installation or configuration of SQL Server.

The Data Workbench upgrade requires that SQL Server has Windows Authentication enabled.

The upgrade process makes changes to the QAS database in the designated SQL Server instance. It uses the default user **qasUser** and password **Qu@dr8q@s** unless an alternative user ID and password are provided during the upgrade process.

SAP Authorization, Transport and Function Requirements

The following authorizations, transports and functions are needed in your SAP environment for Data Workbench operations.

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

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Syniti Data Workbench Download/Query Feature Requirements

The Data Workbench download feature creates queries that interact with SAP through Remote Function Calls (RFC.) Some RFCs are included in the standard SAP environment, but to extract data from SAP, custom function modules called Z_QUADRATE_EXTRACT and Z_QUADRATE_EXTRACT_WORK must be installed on the SAP system using the transport files described below. These files are located in the Sdw_extract folder after Data Workbench has been installed. The default location is as follows:

C:\Program Files (x86)\Syniti\DataWorkbench\DataWorkbench\Sdw_extract

Function Module Installation

The function modules are installed using a simple SAP transport. Your SAP administrator will place the modules in the correct folders on the SAP system, then use the Transport Management System [TMS] to import the transports, creating the necessary Packages, Function Groups and Function Modules.

Transport Files

The following two transport files also need to be imported into your SAP instance: K9A010D.RD2, R9A010D.RD2.

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

Licensing

A Data Workbench license is a combination of [feature set/pool](#), [user type](#) and [installation type](#).

Feature Set/Pool

The features available in your installation of Syniti Data Workbench depend on the type of license you are using, together with any permissions your Data Workbench administrator may have set for your user profile. The Manage User/Group Page in the online help provides more information about permissions. The most common “license types” are shown in the table below.

Feature Set/Pool	Description
Professional	All Data Workbench features are enabled except for the Download Data from SAP option. This type of license is typically used for creating templates and mapping templates to data files. It can be used for an enterprise installation (with server and client components) or for a standalone installation.

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Business	This option offers Data Workbench features to populate an Excel or Access file and upload data to SAP using a template created with a Professional license. The Download Data from SAP option is not available. This type of license can be used for an enterprise installation (with server and client components) or for a standalone installation.
Professional Plus	All Data Workbench features are enabled. This option offers Data Workbench features to populate an Excel or Access file and upload data to SAP, or create a template/query and download data from SAP. This type of license is typically used for creating templates and mapping templates to data files. It can be used for an enterprise installation (with server and client components) or for a standalone installation.
Business Plus	This option offers Data Workbench features to populate an Excel or Access file and upload data to SAP, or download data from SAP, using a template/query created with a Professional or Professional Plus license. This type of license can be used for an enterprise installation (with server and client components) or for a standalone installation.

User Type

As part of the licensing process, you are assigned to one of the following user types. User types are displayed for each user on the [User Details tab](#) of [Manage User/Group Page](#).

User Type	Description
Fixed or Named	Assigned for use on one system only, and provides the user with unrestricted access to enabled features of Data Workbench. After activating the license on a new installation, the Data Workbench administrator can edit the system-generated user name and password for a more user-friendly one.
Floating or Concurrent	A user name and password that belongs to a pool of users. The pool has a maximum size (dictated by the number of licenses purchased) and when the number of logged-in users reaches the limit, no additional users can log in. An administrator can move a floating user from one pool to another.
Roaming	Typically assigned to a system administrator, enabling more control over access to different features. This type of user is not assigned to a pool.

Installation Type

Lastly, 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	<p>Installs the server components 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.</p> <p>An enterprise installation is best suited for multiple users within an organization and provides the following features:</p> <ul style="list-style-type: none">Centralized securityEasy 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.

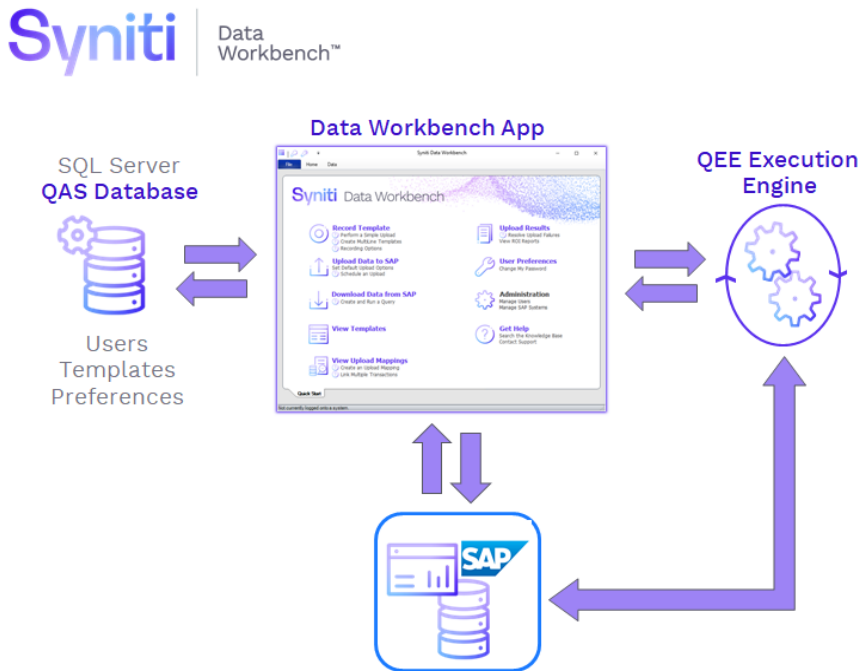
Data Workbench Architecture

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

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- QEE (Execution Engine), a Windows service for running data uploads



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.

Upgrade Options

Select one of the following sections in the guide to upgrade from your current Data Workbench version to Data Workbench 10.

[Upgrade Data Workbench Standalone](#)

For Standalone installations. These instructions assume that you want to keep your current version of SQL Server. If you would like to upgrade your current SQL Server installation, follow the instructions in the section [Upgrade Data Workbench and SQL Server](#).

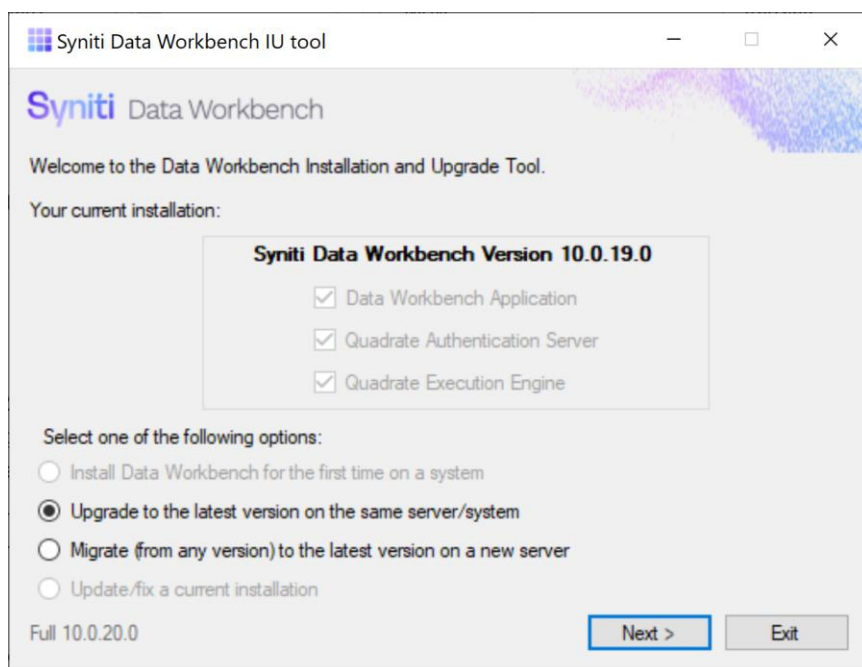
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Upgrade Data Workbench Enterprise Server	For Enterprise Server installations where the SQL Server QAS database is installed on the same system as the Data Workbench QAS Service. These instructions assume that you want to keep your current version of SQL Server.
Upgrade Data Workbench with Remote SQL Server	For Enterprise Server installations where the SQL Server QAS database is installed on a different system to the one where Data Workbench QAS Service is located. These instructions assume that you want to keep your current version of SQL Server.
Upgrade Data Workbench and SQL Server	For Enterprise Server installations where you would like to upgrade the version of SQL Server being used with Data Workbench.
Upgrade Data Workbench Enterprise Client	For Enterprise Client installations of Data Workbench.

Upgrade Data Workbench Standalone

The steps below assume that:

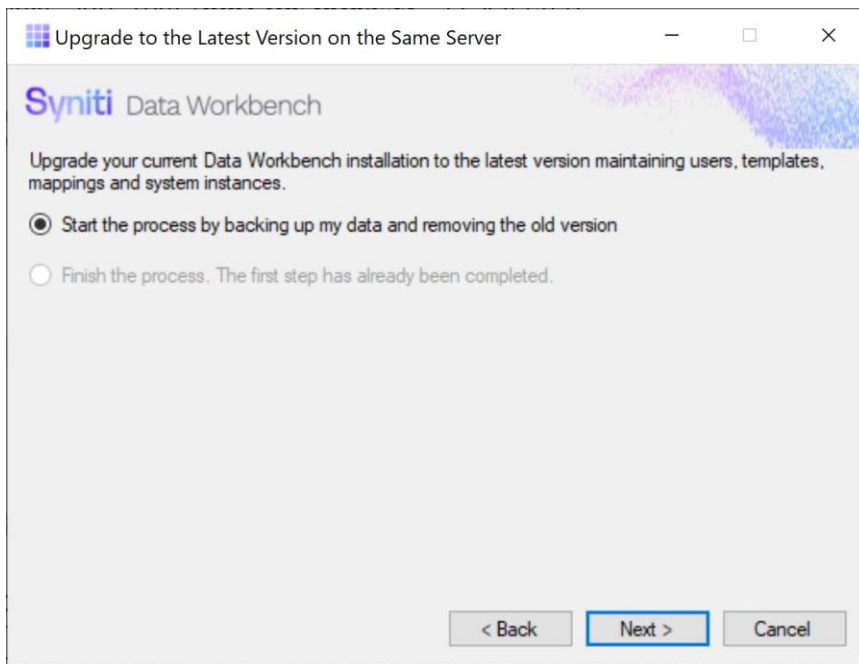
- Your SQL Server installation is local.
 - You want to keep your current version of SQL Server and just upgrade the Data Workbench installation. To also upgrade the SQL Server version, see the section [Upgrade Data Workbench and SQL Server](#).
1. Check your desktop to see that your current installation of Data Workbench is closed before starting the upgrade process.
 2. Double-click on the self-extracting installation package **SynitiDataWorkbench_SelfExtractingSetup.exe**. The Syniti Data Workbench Install and Upgrade tool launches automatically.



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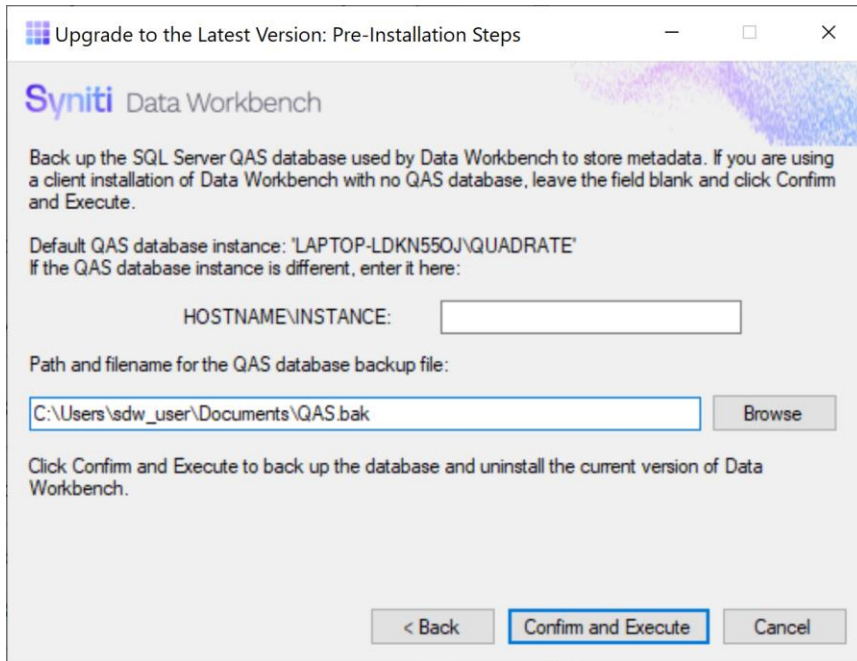
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3. Make sure that **Upgrade to the latest version on the same server/system** is selected.
4. Click **Next**.

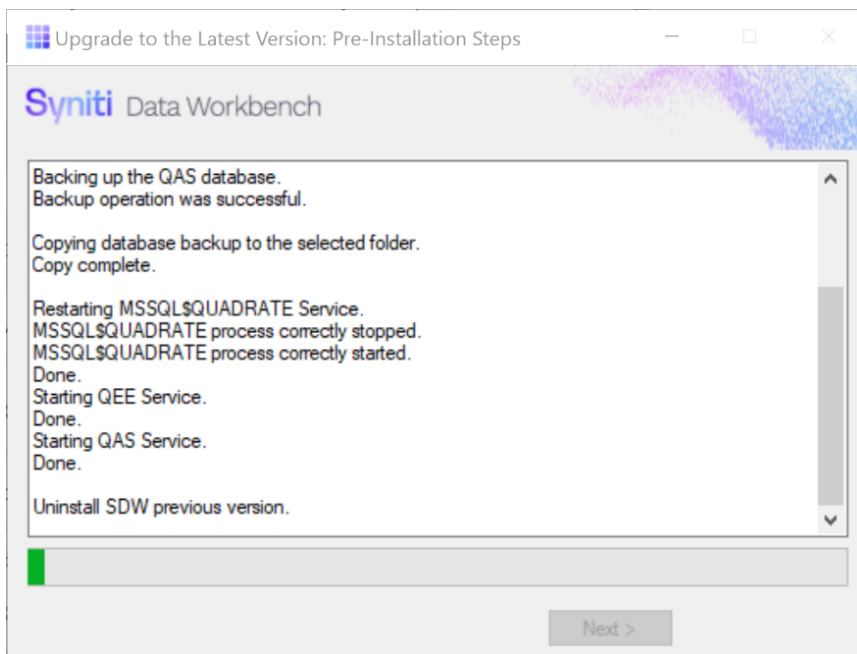


5. Make sure that **Start the process...** is selected.
6. Click **Next**.
The first step is to back up the QAS database used by Data Workbench to store user and template details. The default database instance is QUADRATE on the local system. You do not typically need to change this value for standalone installations.

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7. The backup and restore of the QAS database is managed as part of the upgrade process, but you may also need to access the backup that is created (for example if you also want to [upgrade to a newer version of SQL Server](#).) You can save a backup of the QAS database to a location of your choice.
8. Click **Confirm and Execute**.
The Install Upgrade Tool creates a backup of the database.



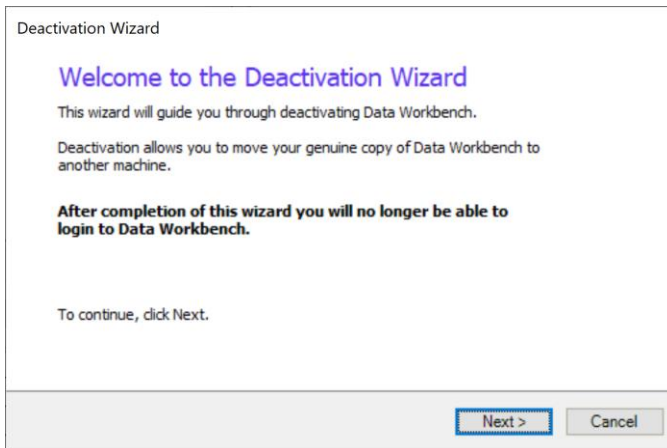
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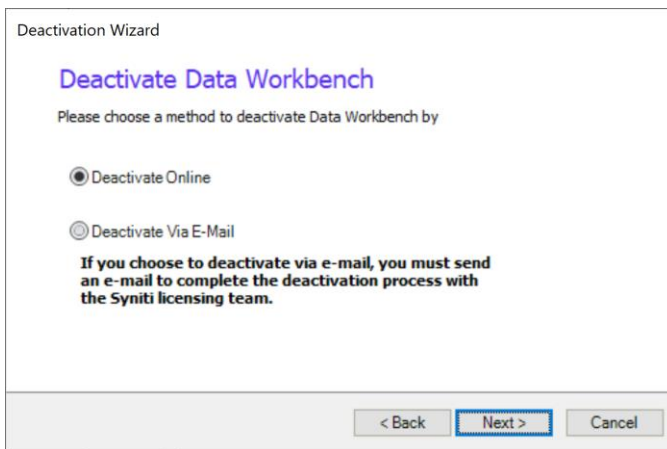
- Click **Yes** to confirm that you want to proceed with an uninstall of the current version of Data Workbench.

NOTE: Depending on your Windows security settings, you may need to explicitly allow the uninstall application to run.

- If the Data Workbench license has not been deactivated, the Deactivation wizard is launched.



- Click **Next**.

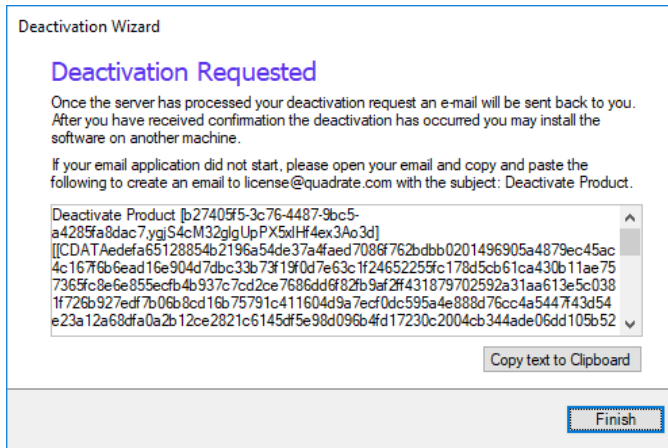


- Choose either **Deactivate Online** or **Deactivate Via E-Mail**. Deactivating online is preferable because it is instant and does not require confirmation from the Syniti licensing team. If you choose to deactivate via email, be sure to send the email as requested in the wizard to complete deactivation.

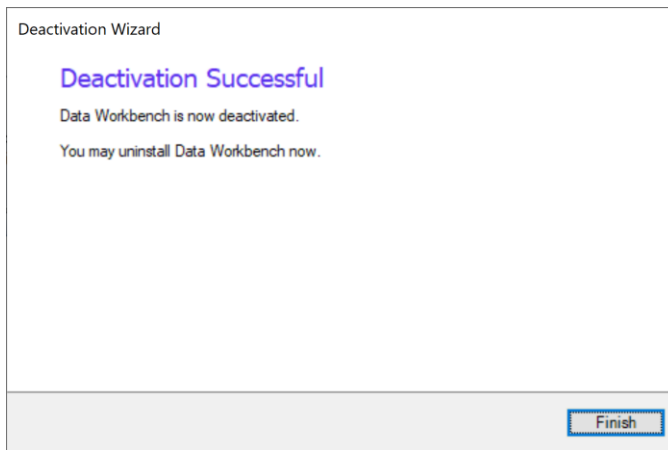
- Click **Next** to start the deactivation process.

For email deactivation, either send an email using the default client displayed by the wizard or follow instructions in the wizard to manually create an email with the correct information.

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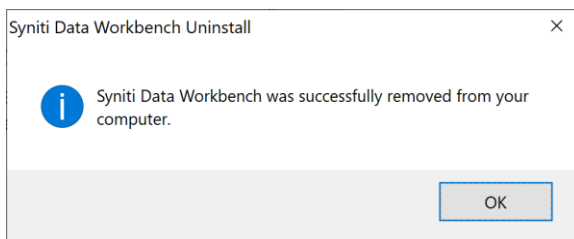


14. Click **Finish** to complete deactivation.



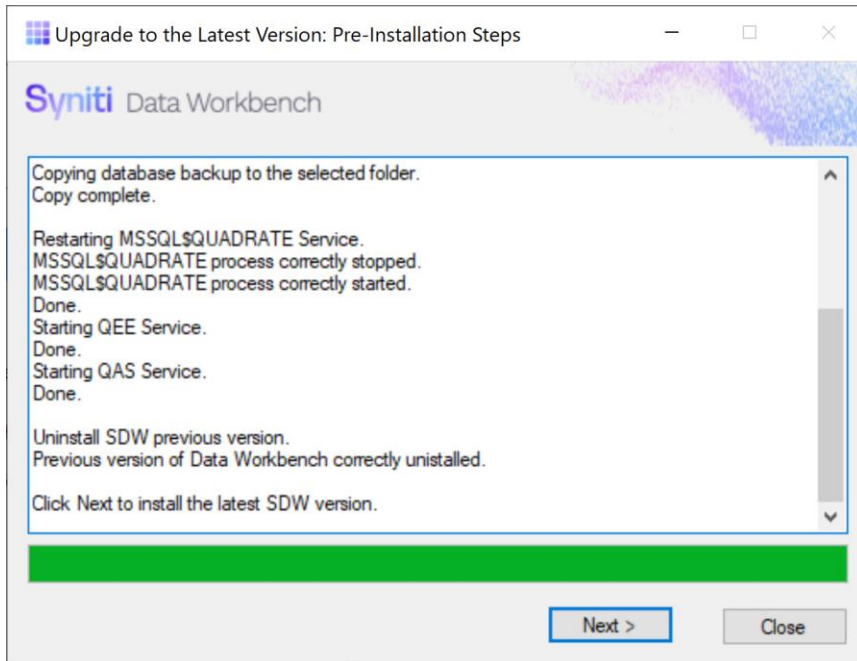
15. Click **Finish** to close the wizard and continue with the uninstall process.

16. Click **OK** when the uninstall process is complete.

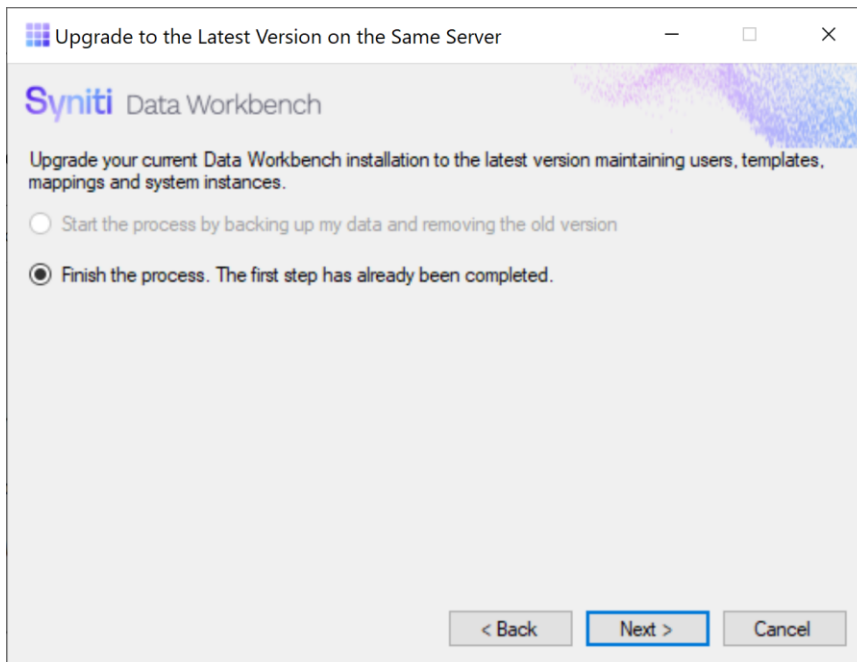


17. In the Install Upgrade Tool, click **Next** to proceed with installation of the latest version.

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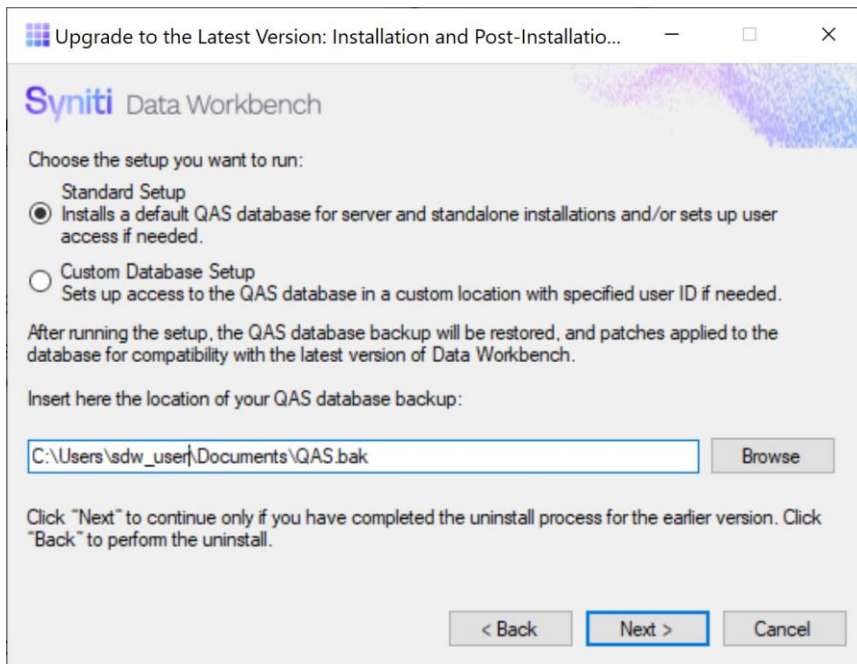
18. Choose the option **Finish the process**.



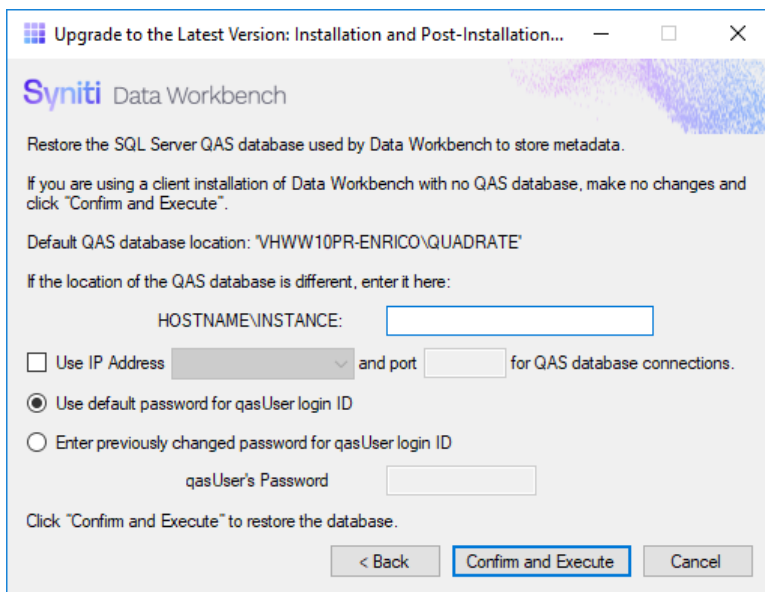
19. Click **Next**.

20. Choose **Standard Setup**.

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21. If you previously backed up your QAS database and want to use it when setting up the new Data Workbench version, enter the path to the backup file.
22. Click **Next**.

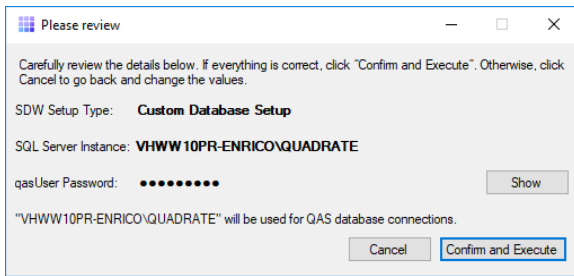


23. If your SQL Server instance is named QUADRATE and it is installed locally with the default user name and password, click **Confirm and Execute**. This is the typical configuration for standalone configurations.

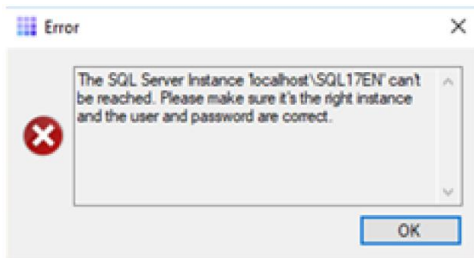
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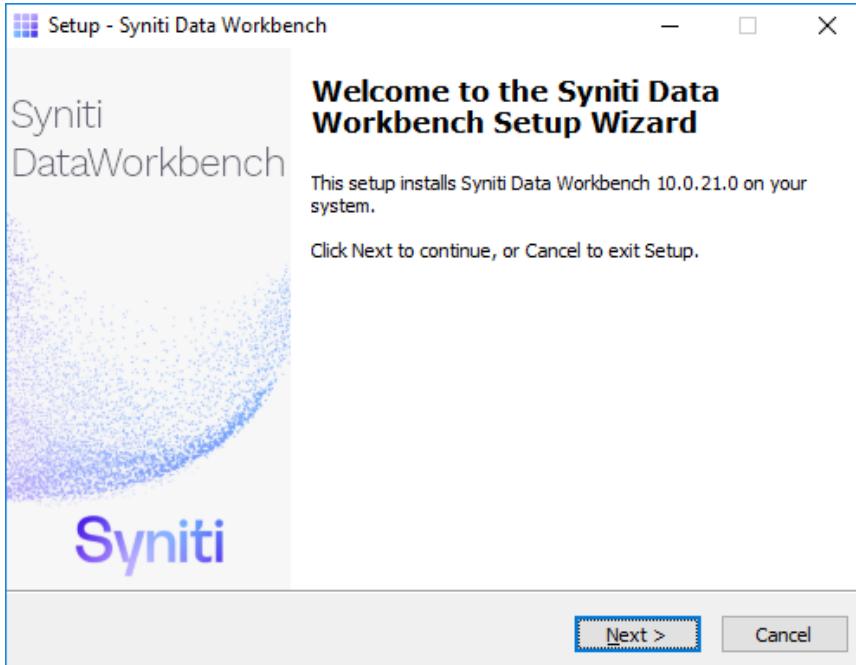
24. In the “Please review” dialog, click **Confirm and Execute** to proceed with restoring the backup, or go back and make changes by clicking **Cancel**.



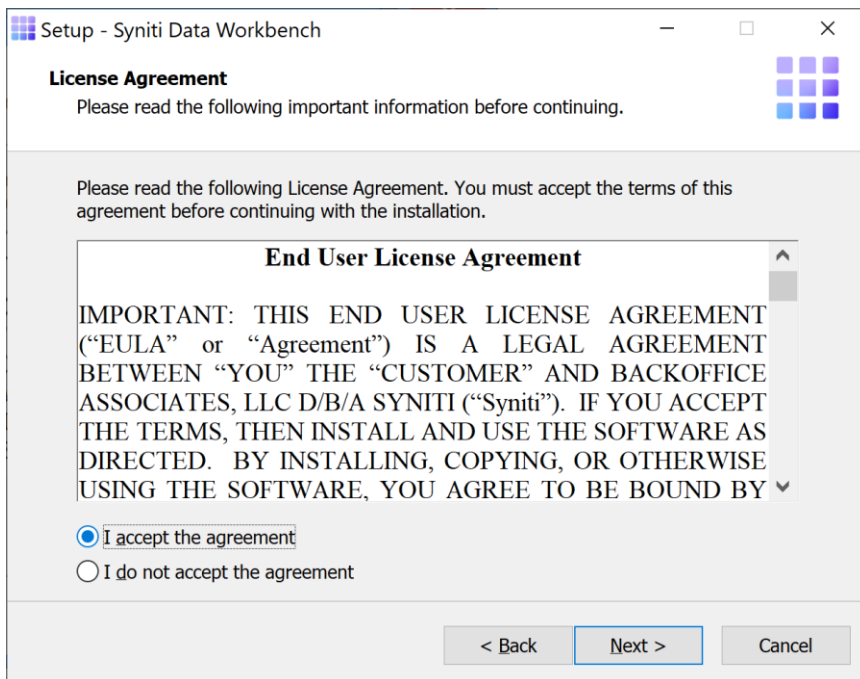
25. When you click **Confirm and Execute**, the Install Upgrade Tool checks your SQL Server instance. If the instance details are not correct, you are asked to reinsert them:



26. In Data Workbench Setup wizard, click **Next**.



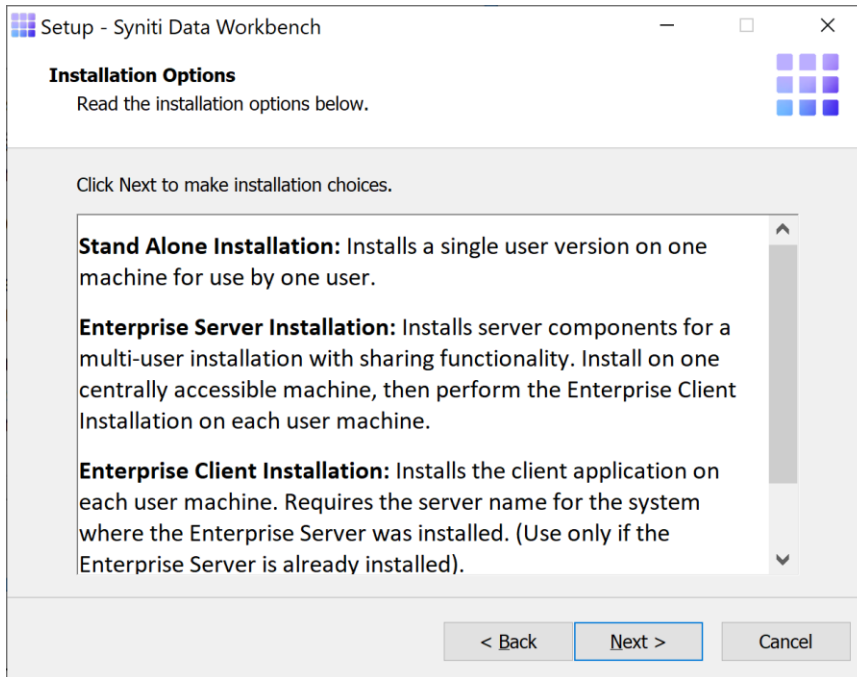
27. Review the agreement and click **I accept the agreement**.



28. Click **Next** to accept the agreement. If you do not accept the agreement, click **Cancel** to exit the installation procedure.

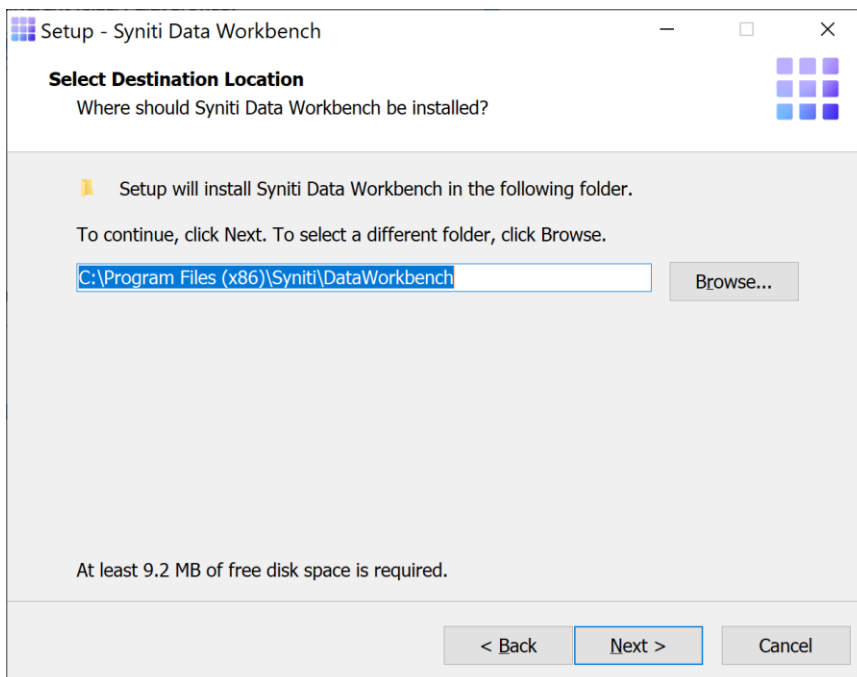
29. Review the installation options.

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30. Click **Next** to continue.

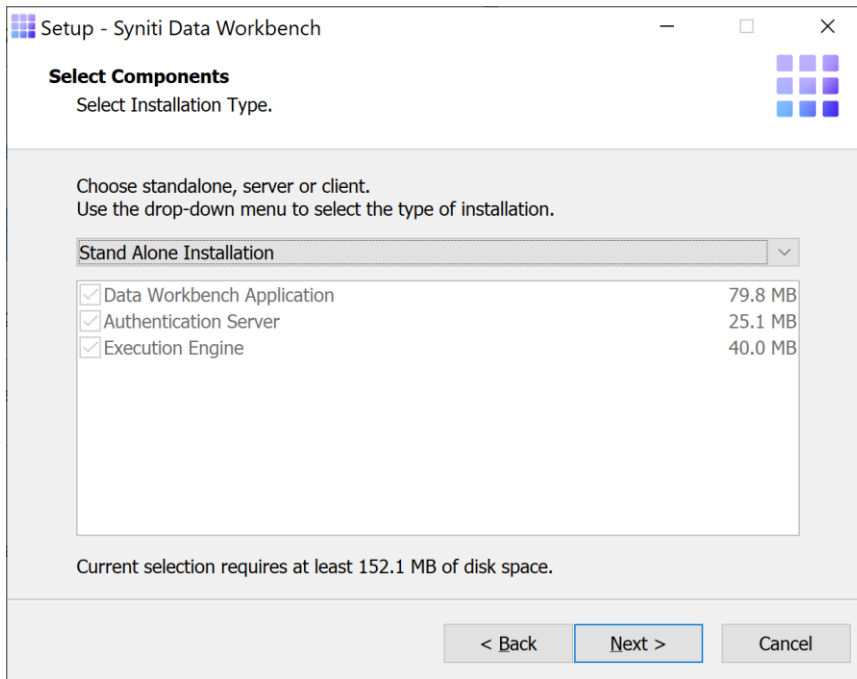
31. Choose a location to install the Data Workbench files, or leave the default.



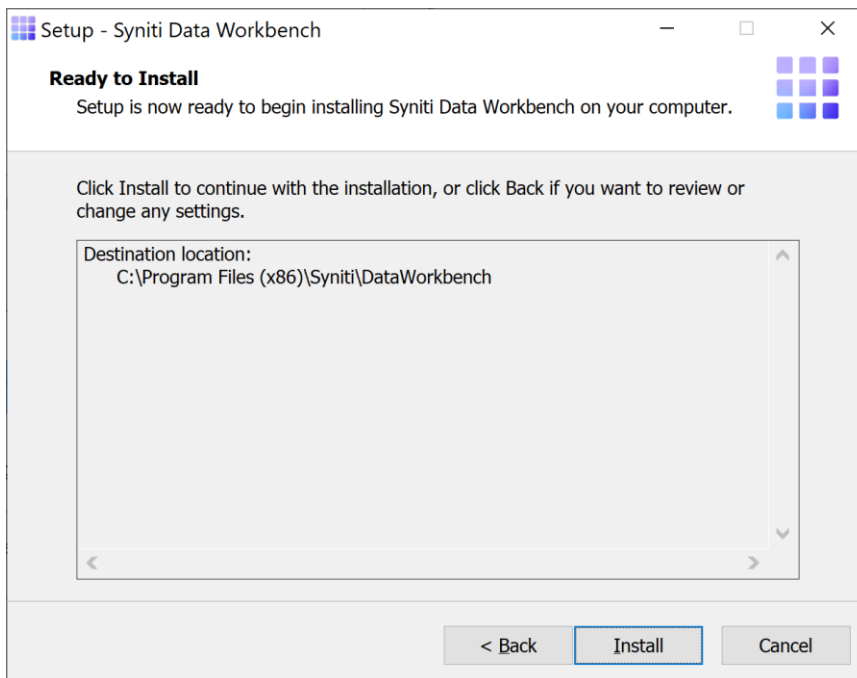
32. Click **Next** to continue.

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33. On the Select Components page, select **Stand Alone Installation** from the drop-down list.



34. Click **Next**.

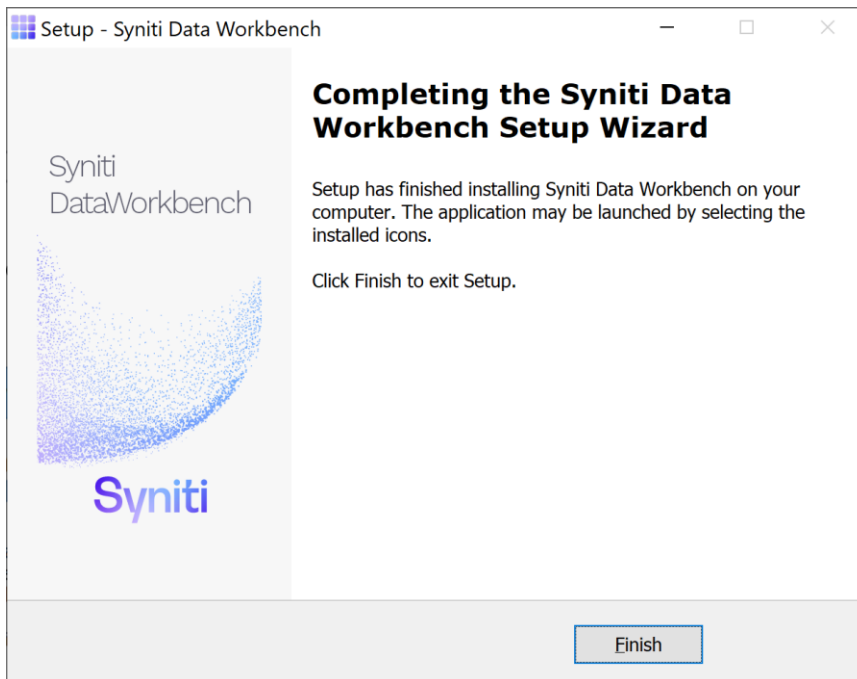


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The Ready to Install page displays the required components that will also be installed. The components that may be installed are:

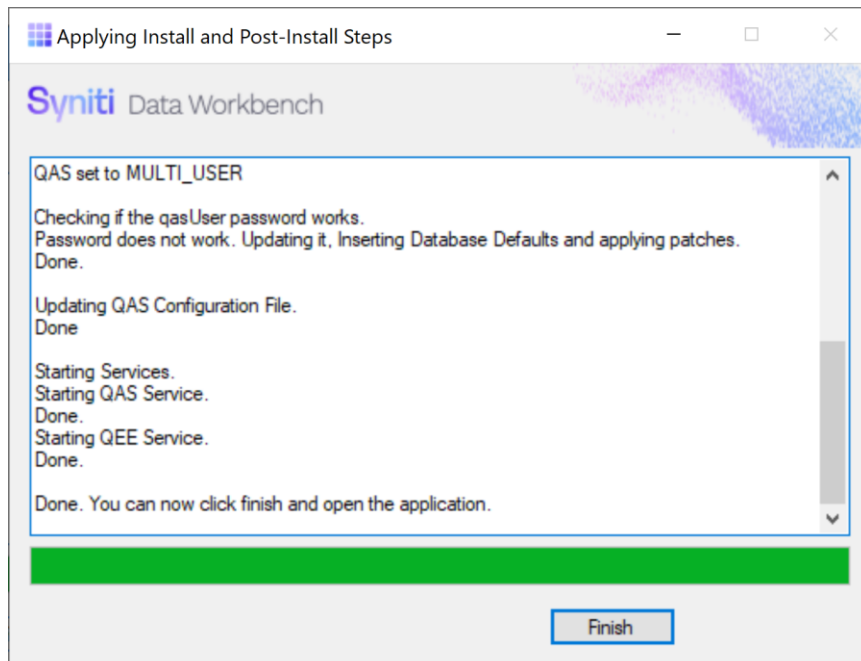
.NET Frameworks 4.5	Installed if your system is running a version of .NET Framework earlier than 4.5.
----------------------------	---

35. Click **Install**; to install required components and the Data Workbench application. Dependencies are downloaded.
36. If .NET Framework is required, you may be asked to confirm download and installation. Do not skip this step.
37. Click **Finish** to complete the setup and return to the Install and Upgrade tool.



The Install and Upgrade tool applies final configuration settings:

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38. Click **Finish** to complete the installation.

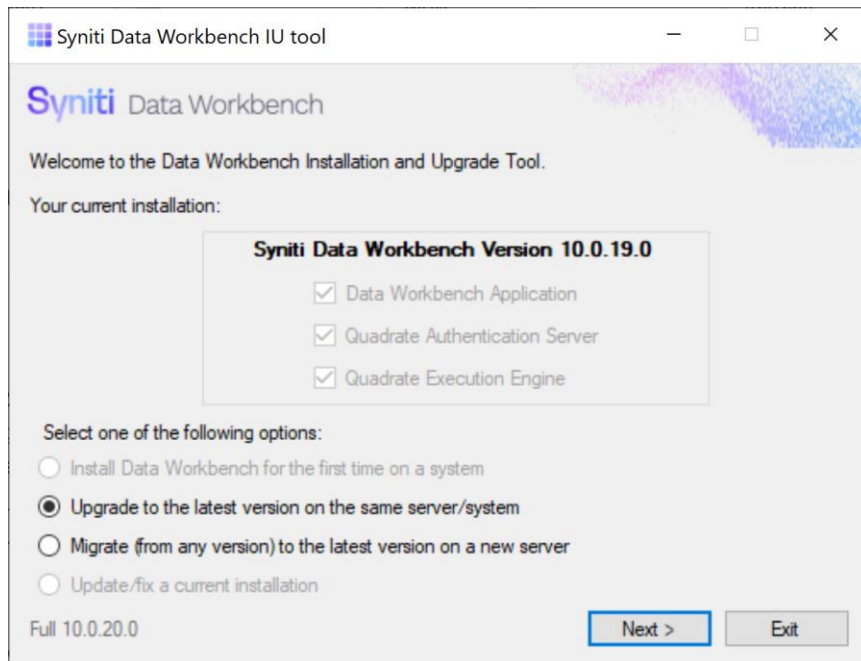
39. The next step is to [Activate Data Workbench](#).

Upgrade Data Workbench Enterprise Server

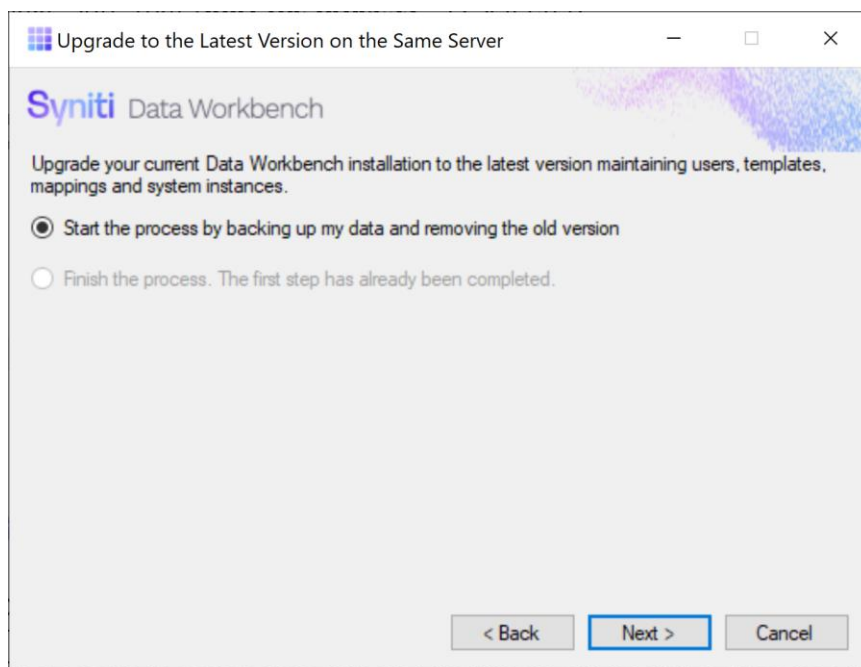
The steps below assume that:

- Your SQL Server installation is local. If your SQL Server is on another system, see the section [Upgrade Data Workbench with Remote SQL Server](#).
 - You want to keep your current version of SQL Server and just upgrade the Data Workbench installation. To also upgrade the SQL Server version, see the section [Upgrade Data Workbench and SQL Server](#).
1. Check your desktop to see that your current installation of Data Workbench is closed before starting the upgrade process.
 2. Double-click on the self-extracting installation package **SynitiDataWorkbench_SelfExtractingSetup.exe**. The Syniti Data Workbench Install and Upgrade tool launches automatically.

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3. Make sure that **Upgrade to the latest version on the same server/system** is selected.
4. Click **Next**.



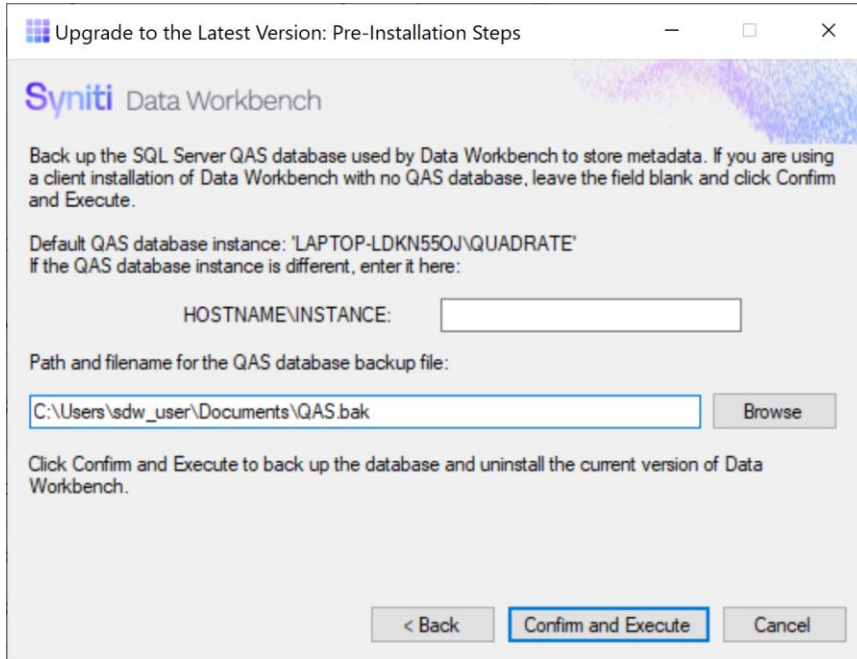
5. Make sure that **Start the process...** is selected.

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6. Click **Next**.

The first step is to back up the QAS database used by Data Workbench to store user and template details. The default database instance is QUADRATE on the local system, but you may be using a different database instance.



7. To use the default location for the SQL Server QUADRATE instance, leave the HOSTNAME/INSTANCE field blank.

To back up the QAS database in a different SQL Server instance, type the server name and the instance name.

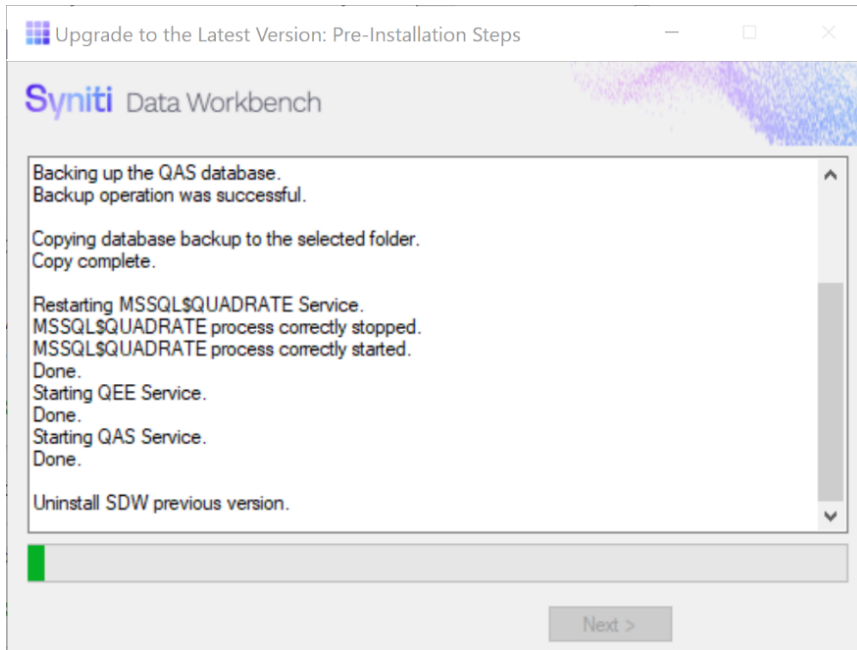
NOTE: SQL Server login credentials are not needed because the backup process uses Windows login credentials. However, the Windows login credentials must include access to the QAS database.

8. The backup and restore of the QAS database is managed as part of the upgrade process, but you may also need to access the backup that is created (for example if you also want to upgrade to a newer version of SQL Server.) You can save a backup of the QAS database to a location of your choice.

9. Click **Confirm and Execute**.

The Install Upgrade Tool creates a backup of the database.

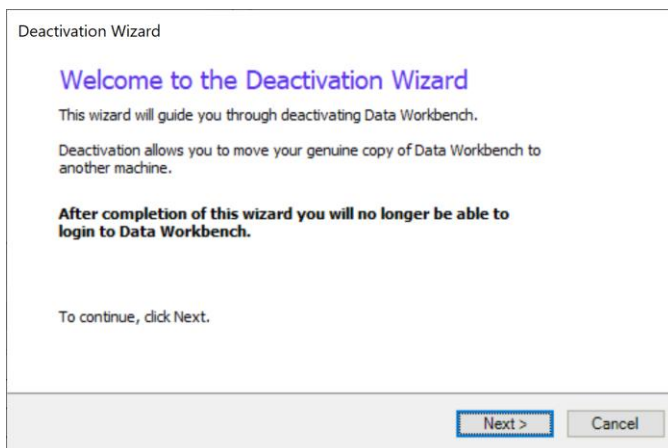
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10. Click **Yes** to confirm that you want to proceed with an uninstall of the current version of Data Workbench.

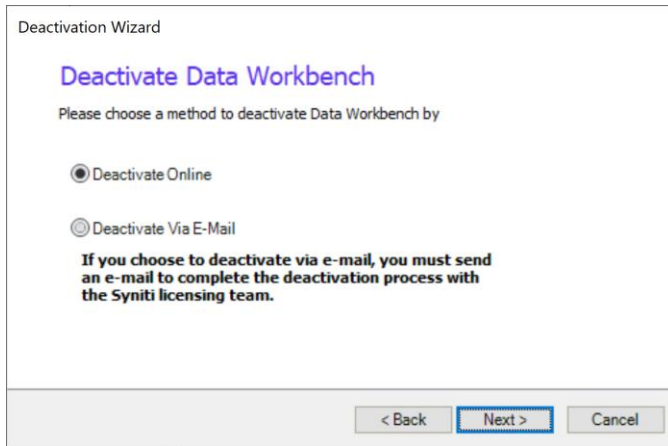
NOTE: Depending on your Windows security settings, you may need to explicitly allow the uninstall application to run.

11. If the Data Workbench license has not been deactivated, the Deactivation wizard is launched.



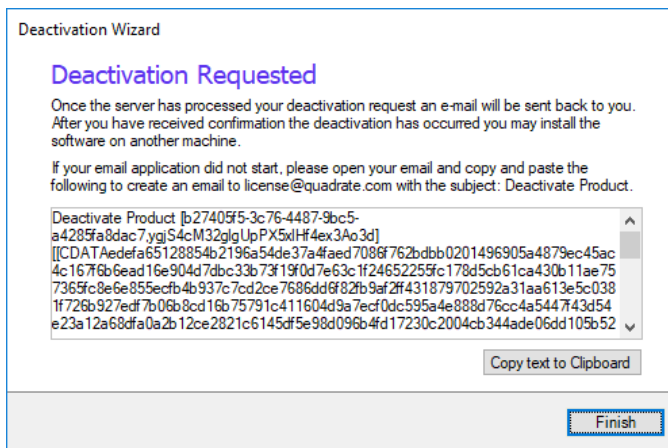
12. Click **Next**.

Syniti Data Workbench



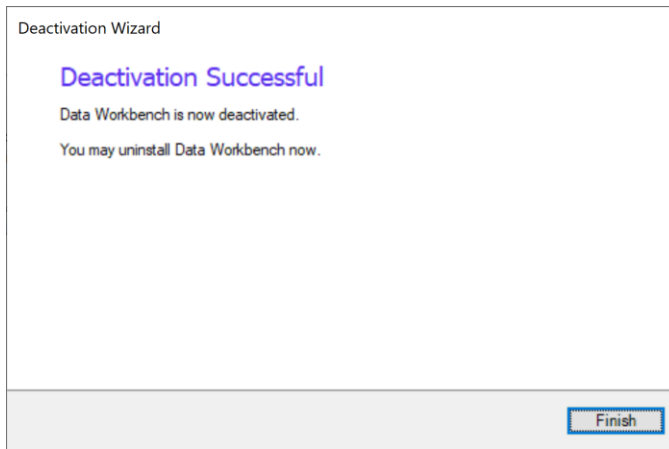
13. Choose either **Deactivate Online** or **Deactivate Via E-Mail**. Deactivating online is preferable because it is instant and does not require confirmation from the Syniti licensing team. If you choose to deactivate via email, be sure to send the email as requested in the wizard to complete deactivation.
14. Click **Next** to start the deactivation process.

For email deactivation, either send an email using the default client displayed by the wizard or follow instructions in the wizard to manually create an email with the correct information.

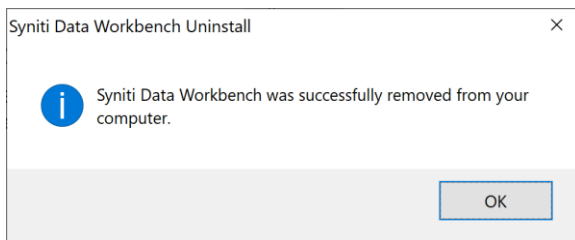


Syniti Data Workbench

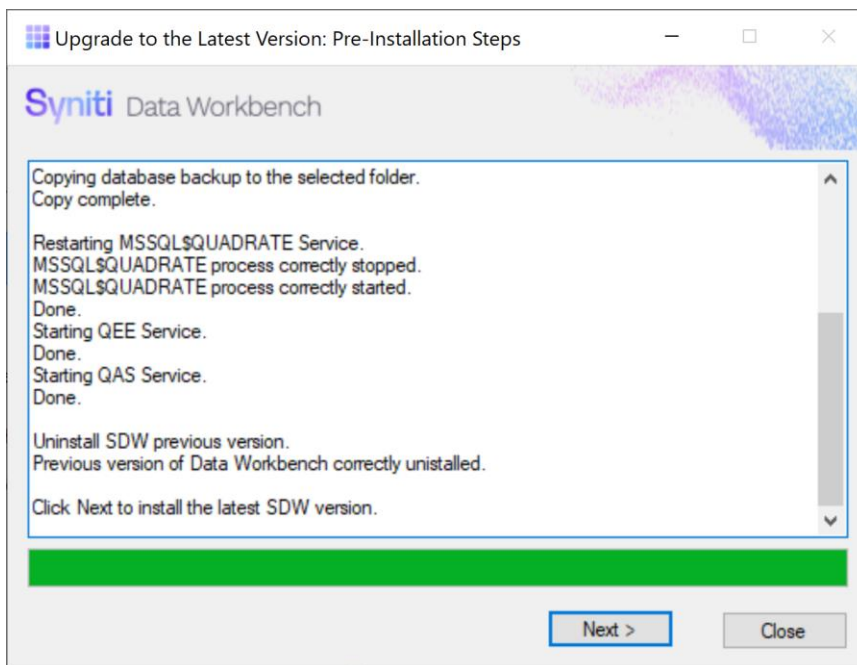
15. Click **Finish** to complete the wizard and continue with the uninstall process.



16. Click **OK** when the uninstall process is complete.



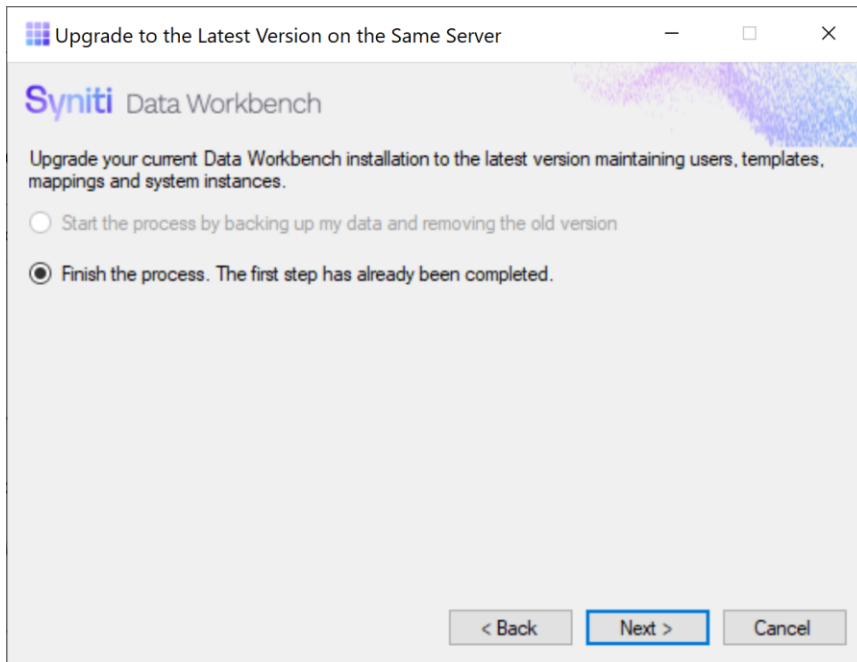
17. In the Install Upgrade Tool, click **Next** to proceed with installation of the latest version.



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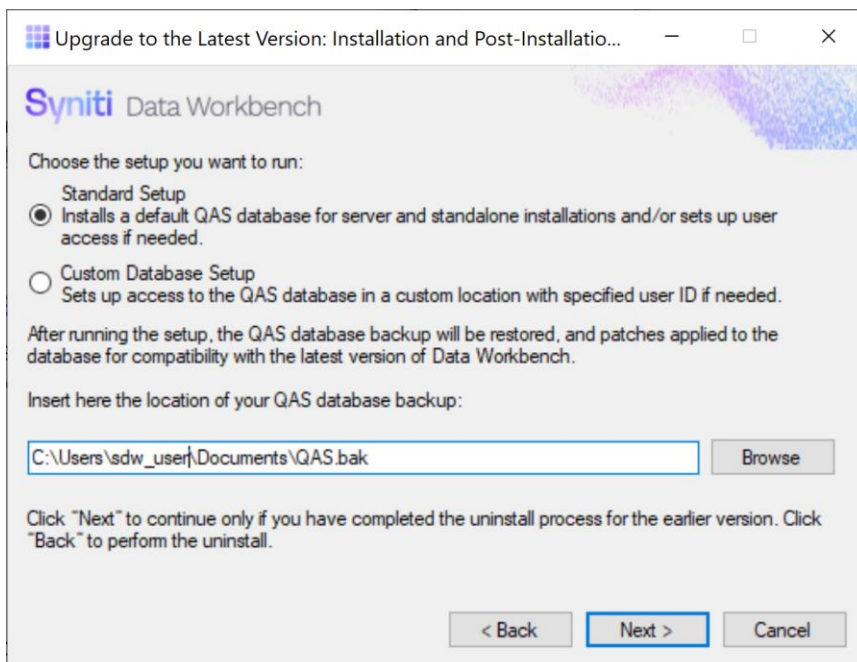
Syniti Data Workbench

18. Choose the option **Finish the process**.



19. Click **Next**.

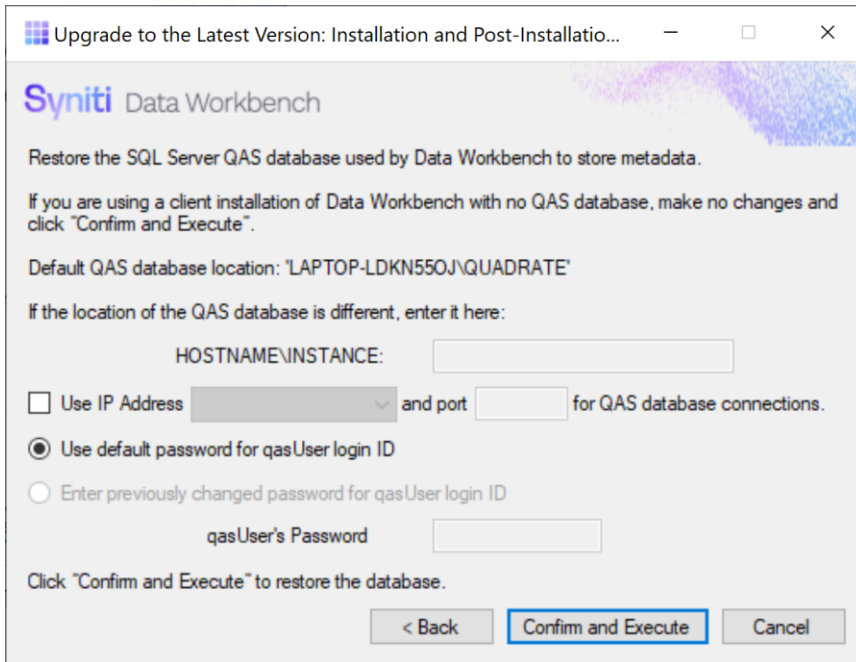
20. Choose either **Standard Setup** or **Custom Database Setup**, depending on the location of your QAS database.



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Syniti Data Workbench

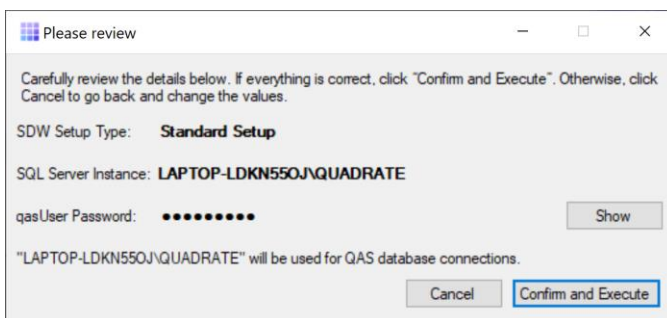
21. If you previously backed up your QAS database and want to use it when setting up the new Data Workbench version, enter the path to the backup file.
22. Click **Next**.



23. If your SQL Server instance is named QUADRATE and it is installed locally with the default user name and password, click **Confirm and Execute**.

Otherwise, enter details for accessing the SQL Server instance where you want to restore the backed up QAS database. You can also specify that an IP address and port number is used for the QAS database system, rather than a system name.

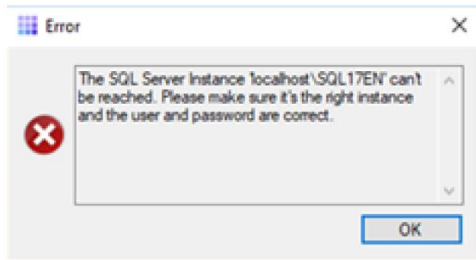
24. In the “Please review” dialog, click **Confirm and Execute** to proceed with restoring the backup, or go back and make changes by clicking **Cancel**.



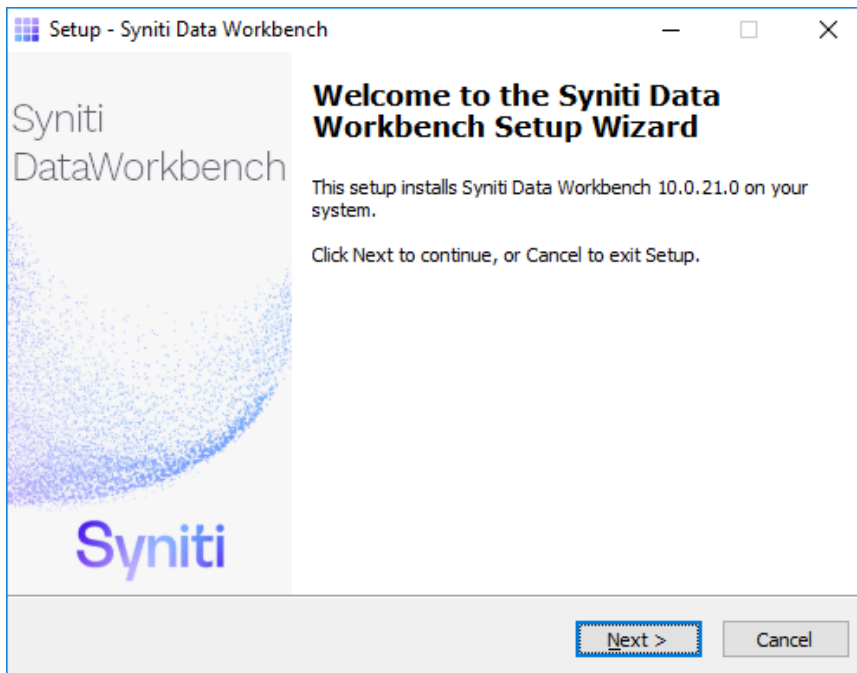
25. When you click **Confirm and Execute**, the Install Upgrade Tool checks your SQL Server instance. If the instance details are not correct, you are asked to reinsert them:

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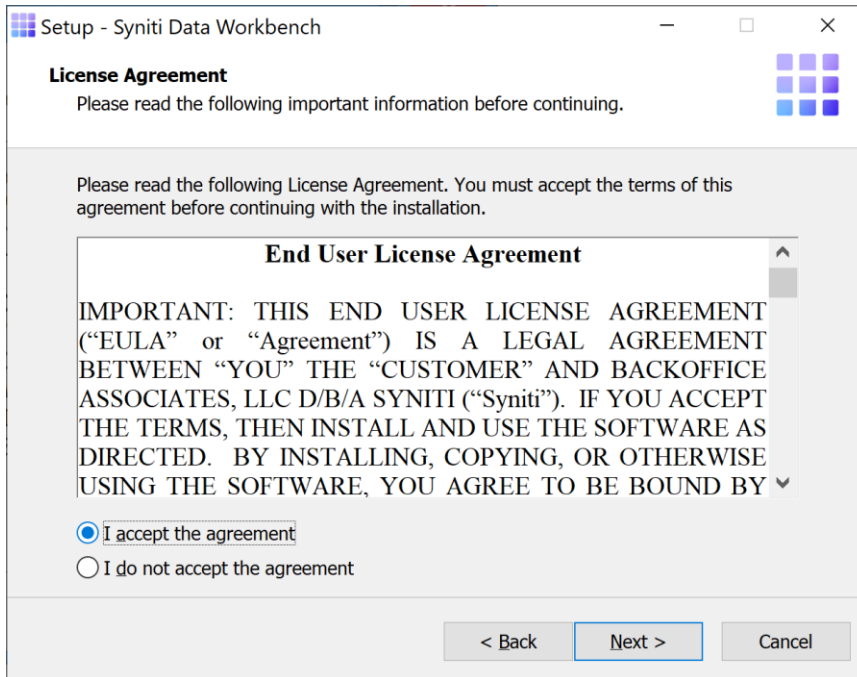
Syniti Data Workbench



26. In Data Workbench Setup wizard, click **Next**.

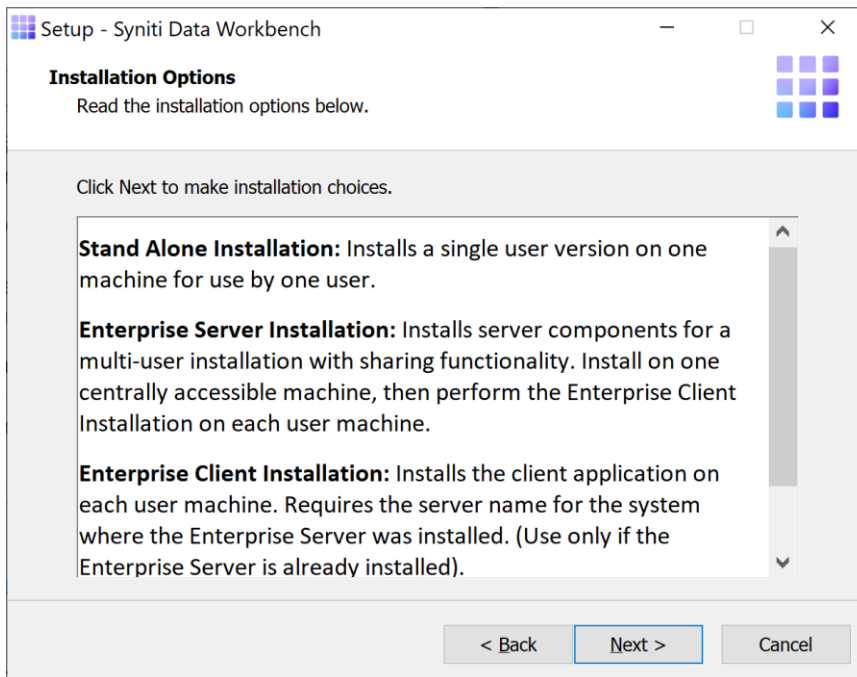


27. Review the agreement and click **I accept the agreement**.



28. Click **Next** to accept the agreement. If you do not accept the agreement, click **Cancel** to exit the installation procedure.

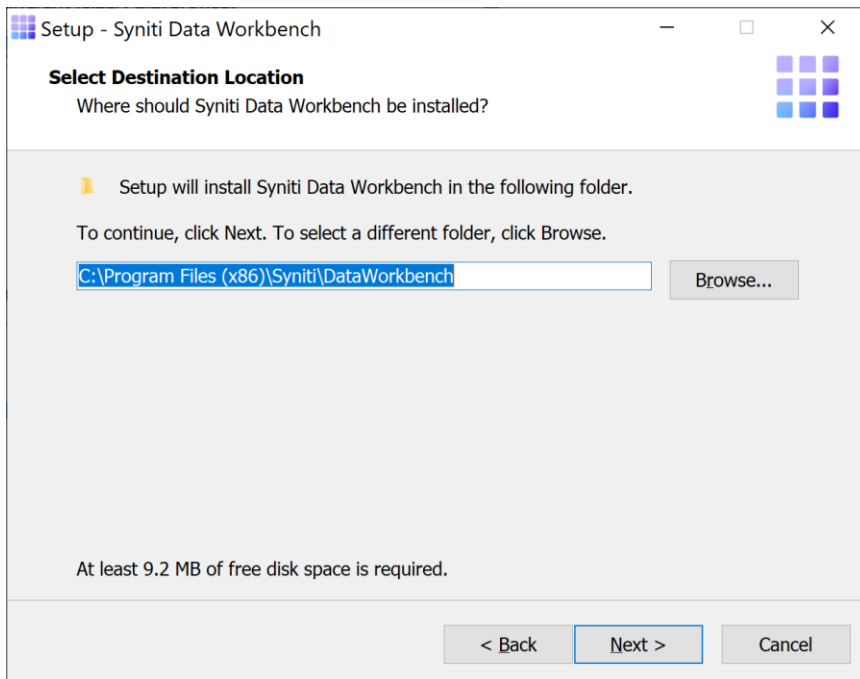
29. Review the installation options.



Syniti Data Workbench

30. Click **Next** to continue.

31. Choose a location to install the Data Workbench files, or leave the default.

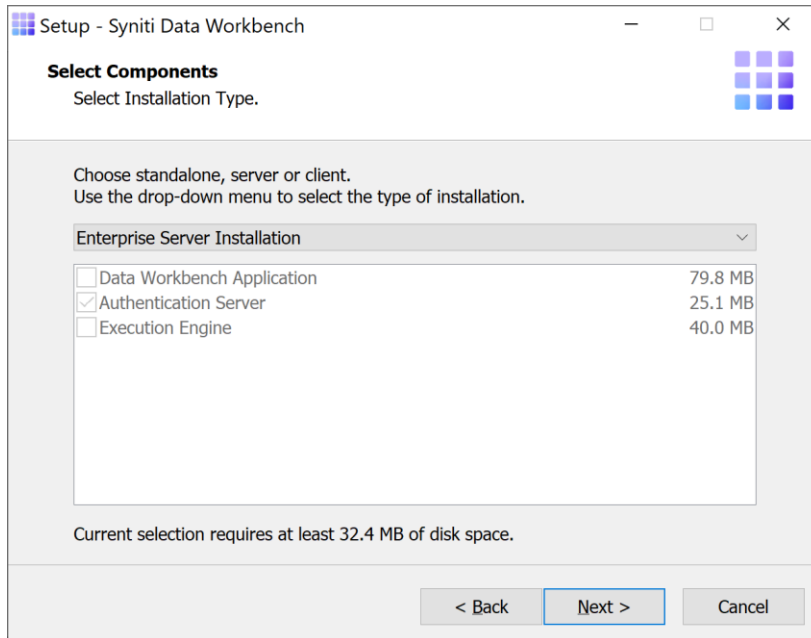


32. Click **Next** to continue.

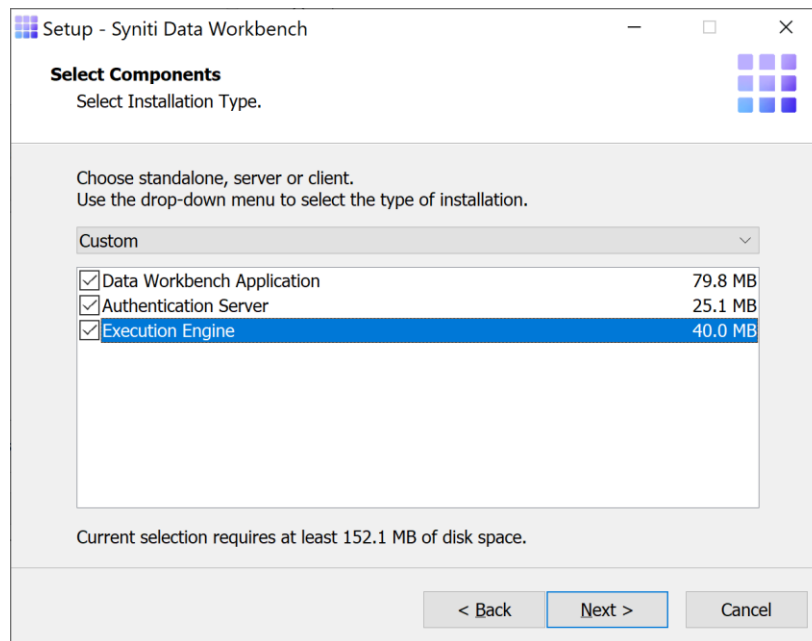
33. On the Select Components page, select from the drop-down list either:

- **Enterprise Server Installation** if you are planning to install just the server component of Data Workbench (QAS – Authentication Server database), without the option to run the Data Workbench GUI or uploads/downloads on the server

Syniti Data Workbench



- Or, **Custom Installation** if you are planning to run the Data Workbench GUI and uploads/downloads on the server.
 - Click to check all three components for installation.



- (Optional) Change the default port numbers only if needed. These values can also be changed in the User Preferences Services tab after installation.

Setup - Syniti Data Workbench

Enterprise Server Setup

Enter the port that the Enterprise Server will run on:

Enter the port the Enterprise Server will run on:

< Back Next > Cancel

- (Optional) Set a server name or IP address for the Email Server field. It is used when scheduling uploads to receive status emails. The value can also be set in the User Preferences Services tab after installation.

Setup - Syniti Data Workbench

Execution Engine Setup

Please enter the port the Execution Engine will run on

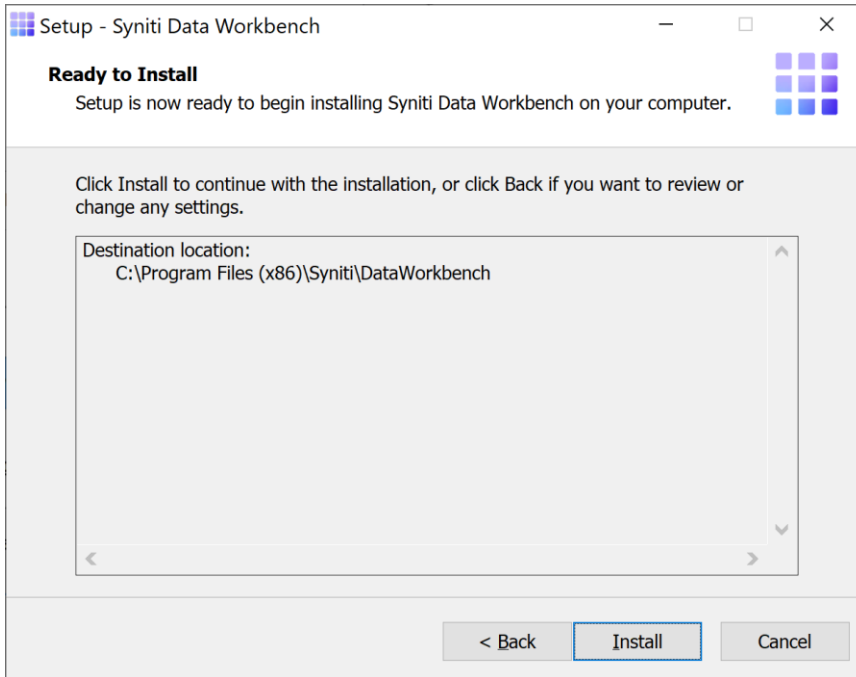
Enter the port the Execution Engine will run on:

Enter the Email Server to send emails through:

< Back Next > Cancel

Syniti Data Workbench

34. Click **Next**.



The Ready to Install page displays the required components that will also be installed. The components that may be installed are:

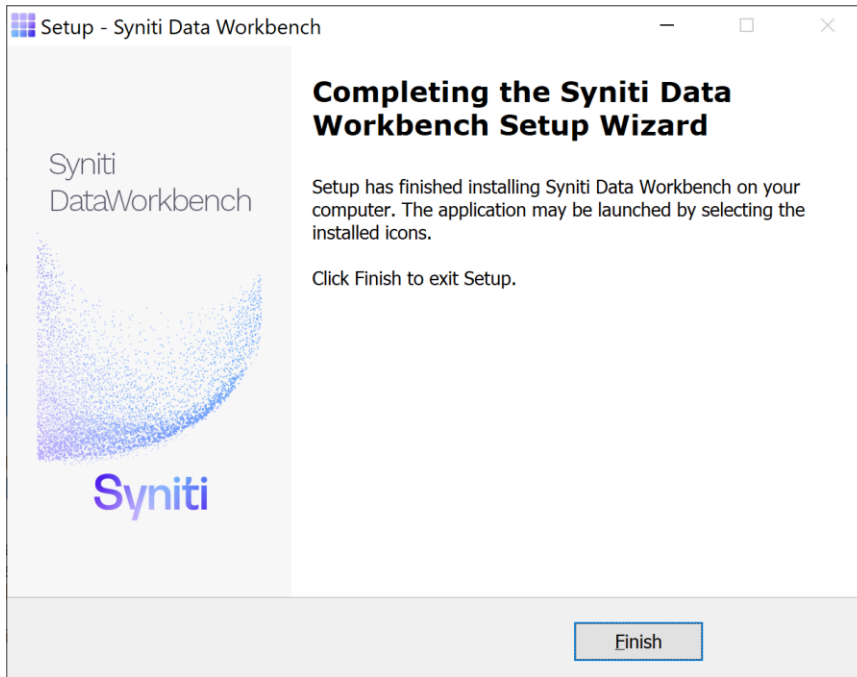
.NET Frameworks 4.5	Installed if your system is running a version of .NET Framework earlier than 4.5.
----------------------------	---

35. Click **Install**; to install required components and the Data Workbench application. Dependencies are downloaded.

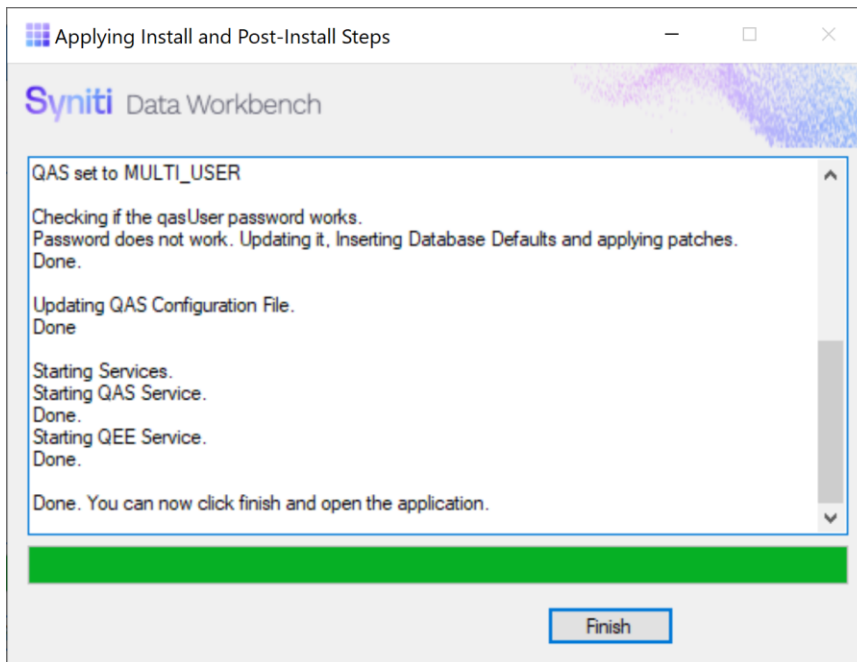
36. If .NET Framework is required, you may be asked to confirm download and installation. Do not skip this step.

37. Click **Finish** to complete the setup and return to the Install and Upgrade tool.

Syniti Data Workbench



The Install and Upgrade tool applies final configuration settings:



38. Click **Finish** to complete the installation.
39. On the system running SQL Server, check that the SQL Server Browser service is running.
40. If using Windows firewall, check that exceptions have been set up to allow connections for Data Workbench.

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Syniti Data Workbench

41. The next step is to [Activate Data Workbench](#).

Upgrade Data Workbench Enterprise Client

RECOMMENDED: [Upgrade Data Workbench on the Enterprise Server](#) before performing any client installation. This makes setting up the connection from each client to the server easier.

In a server-client environment, there are two options for installing Data Workbench clients. Note that the IU tool described in [Upgrade Data Workbench Enterprise Standalone](#) is not designed to be used for the client upgrade process.

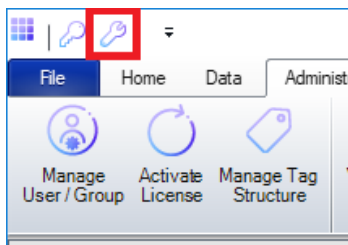
- Use the DataWorkbenchSetup.exe interactively or from the command line
The DataWorkbenchSetup.exe can be downloaded from <https://www.syniti.com/sdw-download-links/> with a product key. You may also choose to run the **DataWorkbenchSetup.exe** file from the command line using a command line option. This approach is described below.
- Create a batch file or similar that includes commands to run the **DataWorkbenchSetup.exe** with command line options and copy a previously-created configuration file to the client. See [Create an Install Package](#) for more information.

The upgrade process consists of the following steps:

1. Check the location of any load files using the User Preferences dialog.
2. Uninstall the current client.
This is necessary for upgrading from 9.x to 10 because the Data Workbench install location has changed.
3. Install the new client.

Identify Template and Load File Location

1. In the Data Workbench window, open the User Preferences dialog.



2. On the **General** tab, check the default folder for load files. If it is not C:\Users\..\Documents\Quadrante\LoadFiles (the default), make a note of the folder.
You will need to set this folder when you install Data Workbench 10.0 to restore access to load files.

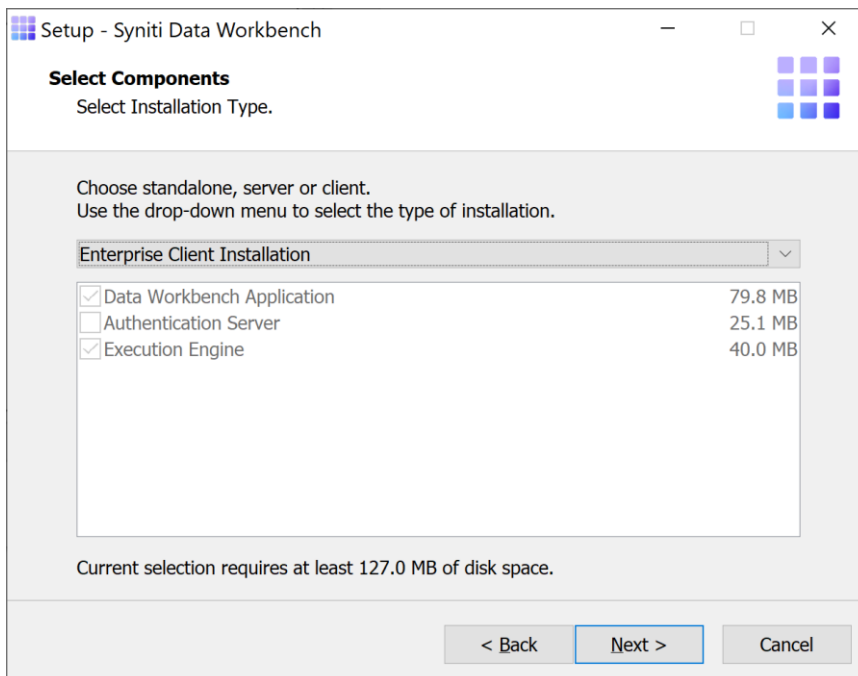
Uninstall Current Version

1. In the Data Workbench install folder (usually C:\Program Files (x86)\Quadrante\DataWorkbench) locate the uninst000.exe file.
2. Double-click the file to start the uninstall.
3. Complete the uninstall by following the prompts in the dialog.

Syniti Data Workbench

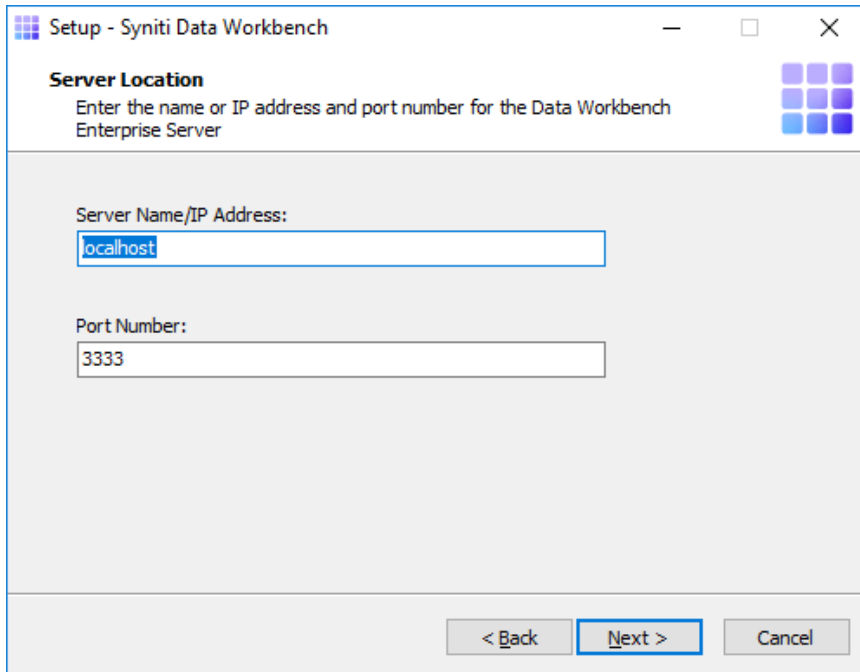
Install New Data Workbench

1. To download the new Data Workbench version, in a web browser, go to: <https://www.syniti.com/sdw-download-links/>.
2. Enter your Data Workbench product 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 link **SynitiDataWorkbench_10.0.x_Manual_Install.zip** to download the setup zip file containing **DataWorkbenchSetup.exe**.
5. To extract the files from the zip file, right-click on the downloaded zip file and choose **Extract All**, selecting a folder of your choice.
6. Run the **DataWorkbenchSetup.exe** file.
7. On the Select Components page, choose Enterprise Client Installation.



8. Click **Next**.
9. On the Server Location page, type the name or IP address of the Windows server where the Data Workbench server component was installed. Your system administrator should provide this value.

Syniti Data Workbench



The screenshot shows a Windows-style dialog box titled "Setup - Syniti Data Workbench". The main heading is "Server Location" with a sub-instruction: "Enter the name or IP address and port number for the Data Workbench Enterprise Server". There are two input fields: "Server Name/IP Address:" containing the text "localhost" and "Port Number:" containing the text "3333". At the bottom, there are three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel".

10. Type the port number for the Data Workbench server. Your system administrator should provide this value.
11. Click **Next**.
12. Click **Install** to complete the setup.

Upgrade Data Workbench with Remote SQL Server

The steps below assume that:

- Your SQL Server installation is on a different system to the one where Data Workbench is installed. If they are on the same system, see the section [Upgrade Data Workbench Enterprise Server or Standalone](#).

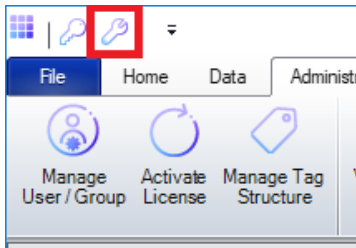
The upgrade process consists of the following steps:

1. Check the location of any load files using the User Preferences dialog.
2. Uninstall the current Enterprise Server.
This is necessary for upgrading from 9.x to 10 because the Data Workbench install location has changed.
3. Install the new Enterprise Server.

Syniti Data Workbench

Identify Template and Load File Location

1. In the Data Workbench window, open the User Preferences dialog.



2. On the **General** tab, check the default folder for load files. If it is not C:\Users\...\Documents\Quadrant\LoadFiles (the default), make a note of the folder. You will need to set this folder when you install Data Workbench 10.0 to restore access to load files.

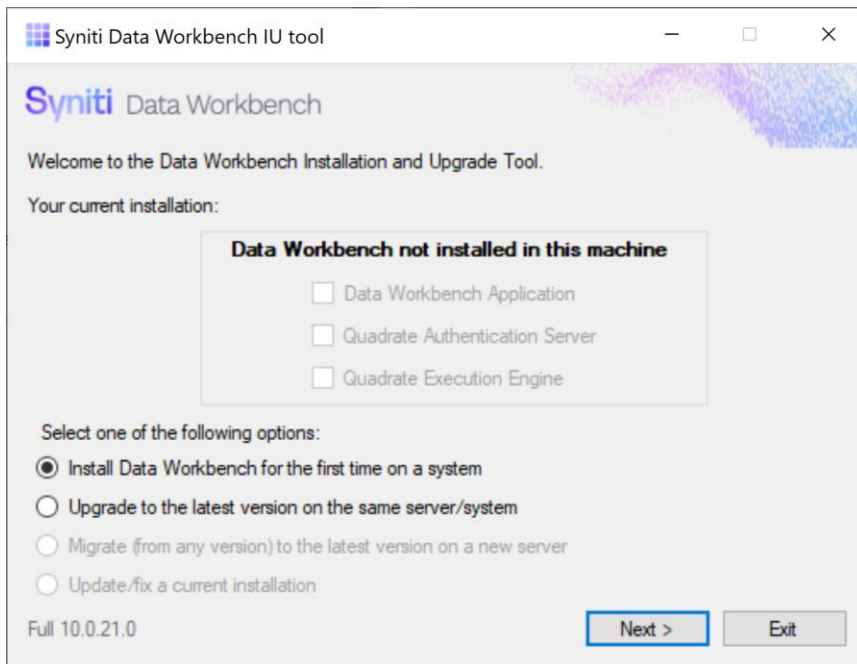
Uninstall Current Version

1. In the Data Workbench install folder (usually C:\Program Files (x86)\Quadrant\DataWorkbench) locate the uninst000.exe file.
2. Double-click the file to start the uninstall.
3. The first step in the uninstall process is to deactivate your Data Workbench license. 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.
4. Complete the uninstall by following the prompts in the dialog.

Install New Data Workbench

1. Check your desktop to see that your current installation of Data Workbench is closed before starting the upgrade process.
2. [Download Data Workbench](#) if you have not already done so.
42. Double-click on the self-extracting installation package **SynitiDataWorkbench_SelfExtractingSetup.exe**. The Syniti Data Workbench Install and Upgrade tool launches automatically.

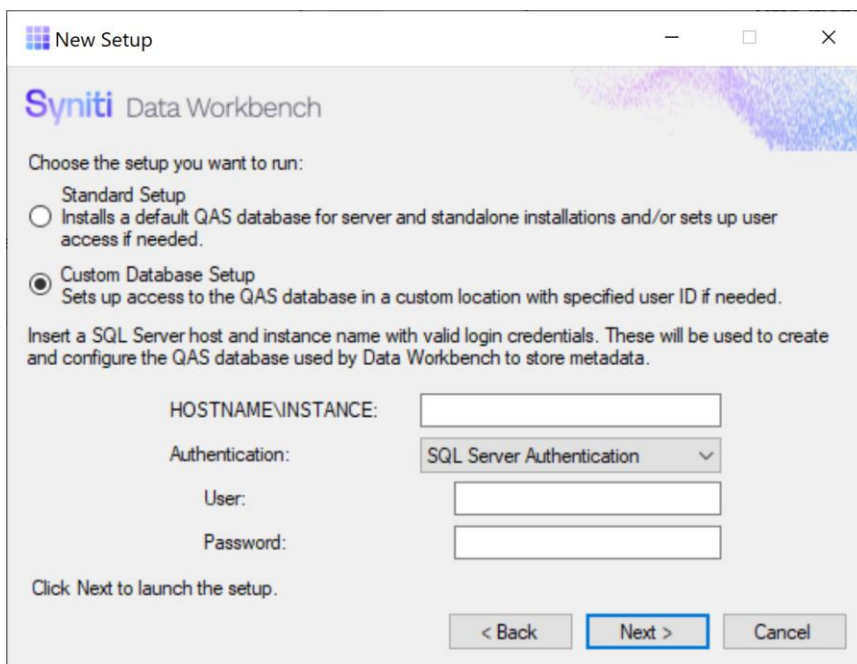
Syniti Data Workbench



43. Make sure that **Install Data Workbench for the first time on a system** is selected. (Note: you are choosing this option because you previously uninstalled Data Workbench manually.)

44. Click **Next**.

45. Choose **Custom Database Setup**.



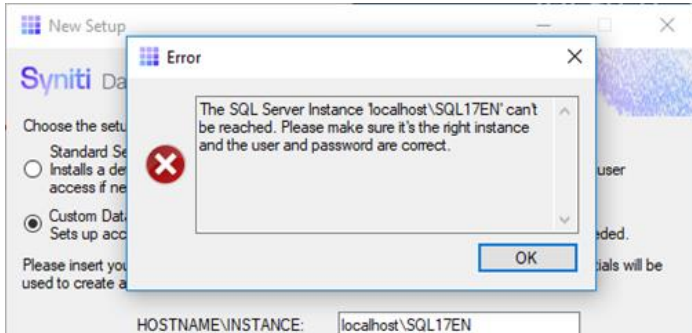
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Syniti Data Workbench

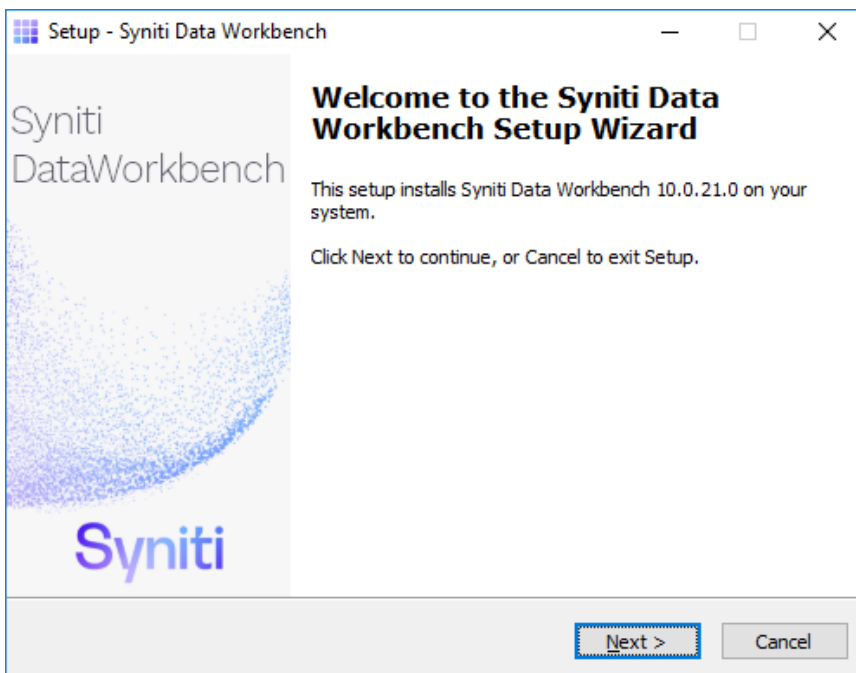
IMPORTANT: For a Custom Database Setup, SQL Server must already be installed.

46. Type the HOSTNAME and INSTANCE for SQL Server. The HOSTNAME can be a system name or IP address and port number.
47. Choose the type of authentication and a login ID and password for SQL Server. The login ID must have SQL Server permissions to create users, databases and tables.

When you click **Next**, the Install Upgrade Tool checks your SQL Server credentials. If the credentials are not correct, you are asked to reinsert them:

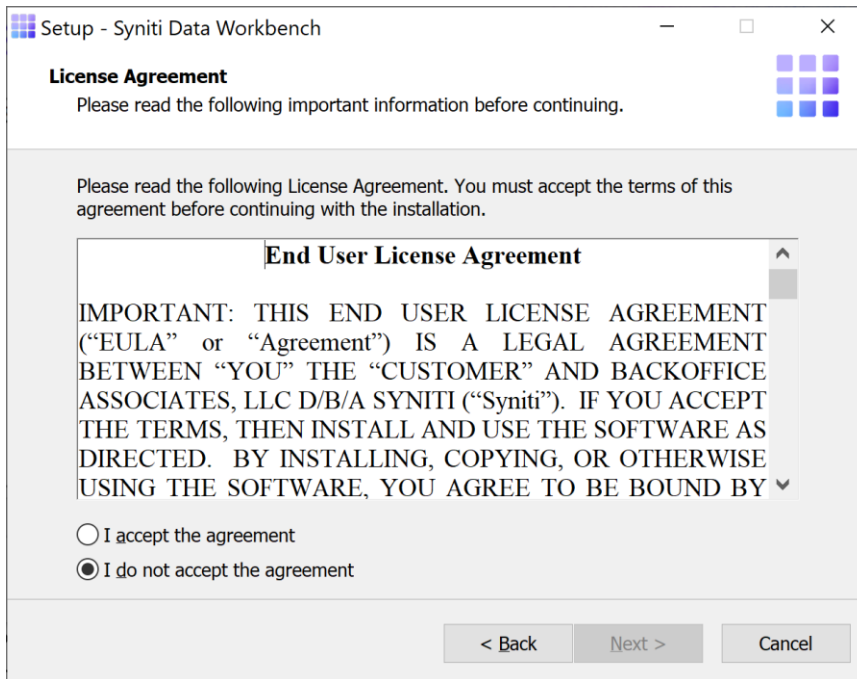


48. Click **Next** to launch the setup program that installs Data Workbench and supporting files.



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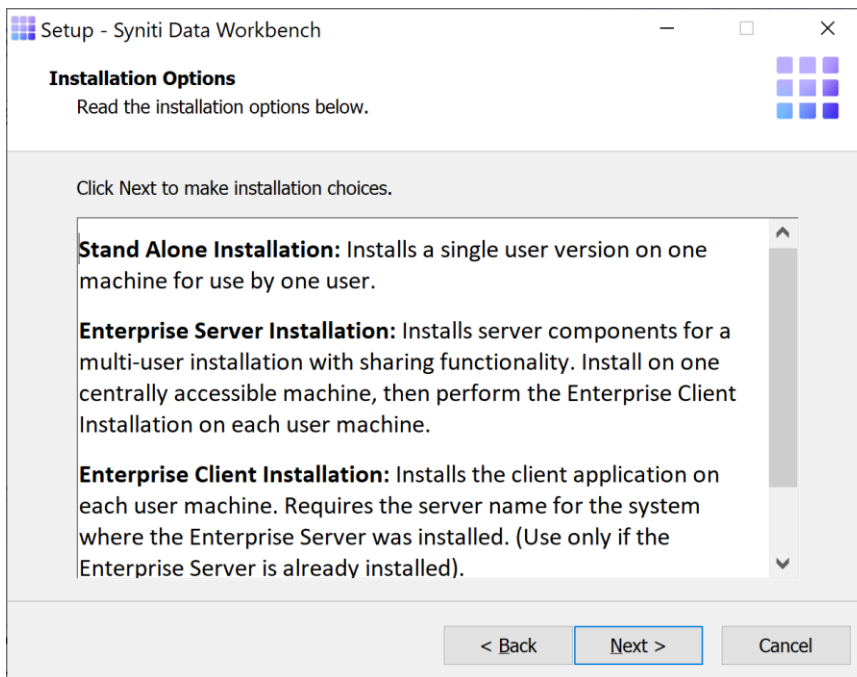
49. Click **Next** to display the license agreement.



50. Review the agreement and click **I accept the agreement**.

51. Click **Next** to accept the agreement. If you do not accept the agreement, click **Cancel** to exit the installation procedure.

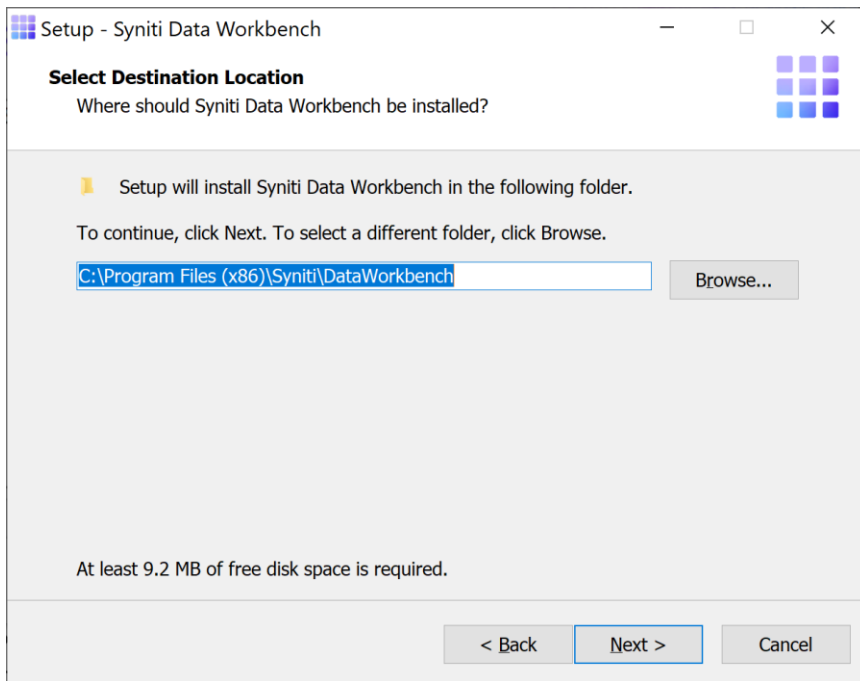
52. Review the installation options.



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53. Click **Next** to continue.

54. Choose a location to install the Data Workbench files, or leave the default.

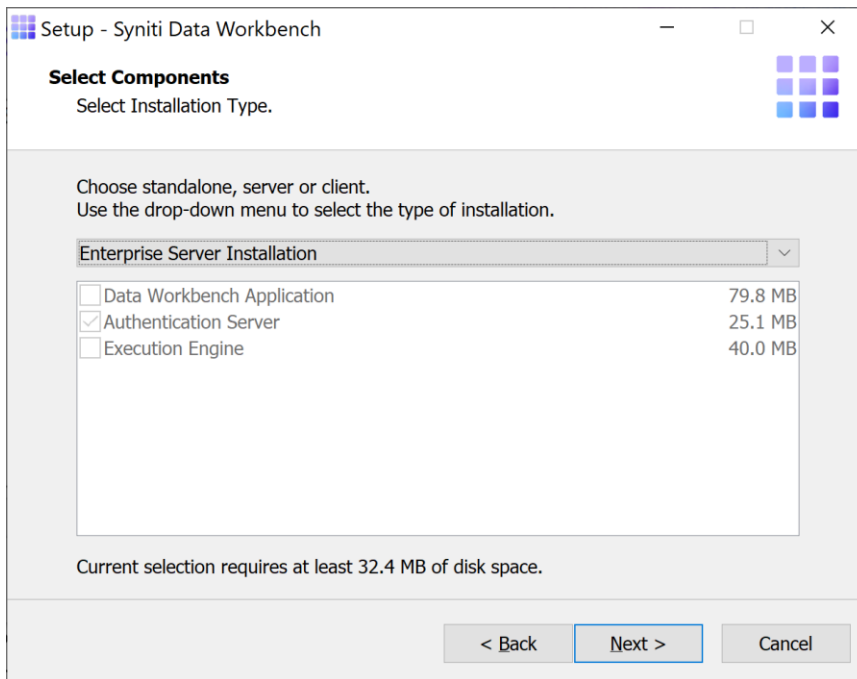


55. Click **Next** to continue.

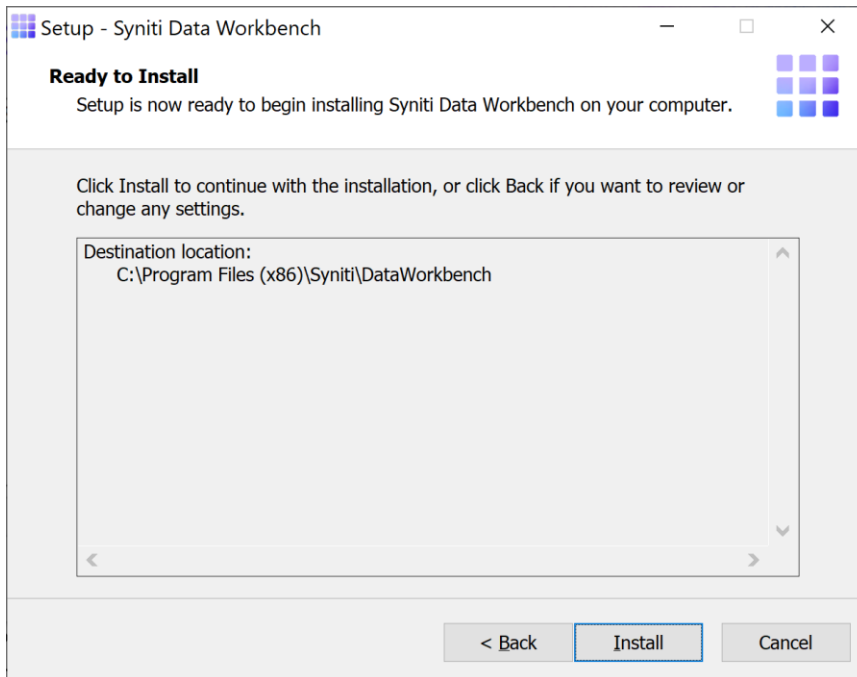
56. On the Select Components page, select **Enterprise Server Installation** from the drop-down menu.

NOTE: This installs only the server component of Data Workbench. If the server system will also support a user, such as an administrator, choose **Custom** instead and select all components. You will still be able to set up clients.

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57. Click **Next**.



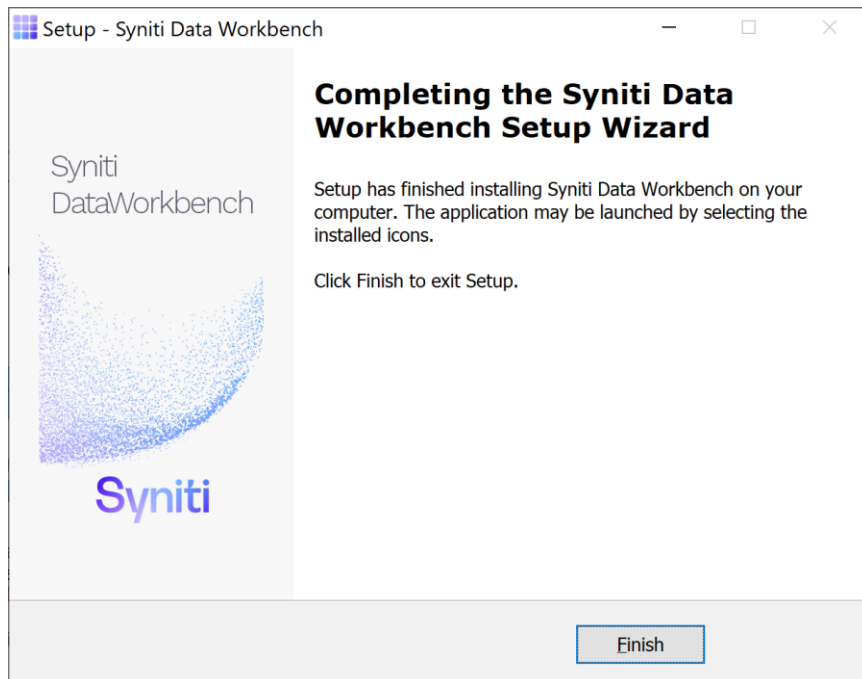
The Ready to Install page displays the required components that will also be installed. The components that may be installed are:

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Syniti Data Workbench

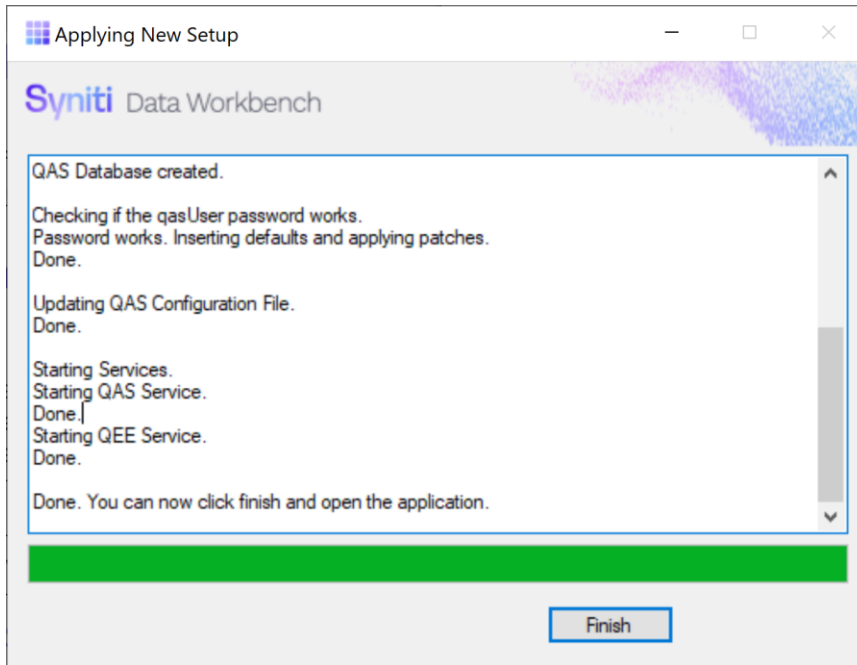
.NET Frameworks 4.5	Installed if your system is running a version of .NET Framework earlier than 4.5.
----------------------------	---

58. Click **Install**; to install required components and the Data Workbench application.
59. If .NET Framework is required, you may be asked to confirm download and installation. Do not skip this step.
60. Click **Finish** to complete the setup and return to the Install and Upgrade tool.



The Install and Upgrade tool applies final configuration settings:

Syniti Data Workbench



61. Click **Finish** to complete the installation.
62. The next step is to [Activate Data Workbench](#).

Upgrade Data Workbench and SQL Server

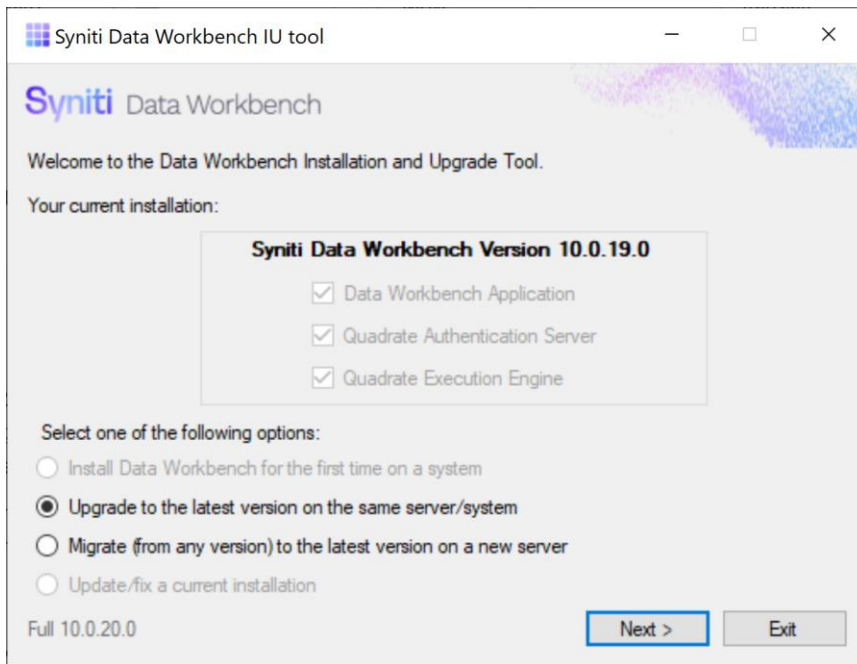
The steps below describe how to upgrade both your installation of SQL Server and Data Workbench. Here is a summary of the process:

1. Prepare for the new SQL Server installation by locating and downloading the SQL Server version you want to use. Do not proceed with installation at this time.
2. Run the Data Workbench Install Upgrade Tool.
3. Choose the Upgrade option.
4. Save the Data Workbench QAS backup database to an accessible location.
5. Close the Install Upgrade Tool.
6. Uninstall/install or upgrade the SQL Server instance using the process recommended by SQL Server and following guidelines in this guide.
7. Open the Data Workbench Install Upgrade Tool.
8. Run the second part of the Upgrade process to perform the Data Workbench installation.

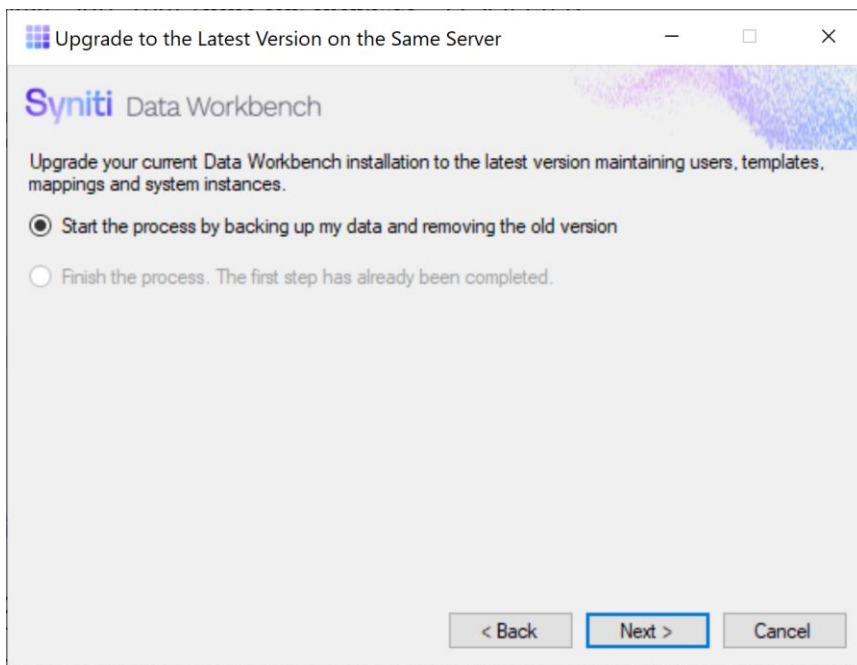
Once you have identified which SQL Server you plan to install:

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

Syniti Data Workbench



2. Make sure that **Upgrade to the latest version on the same server/system** is selected.
3. Click **Next**.

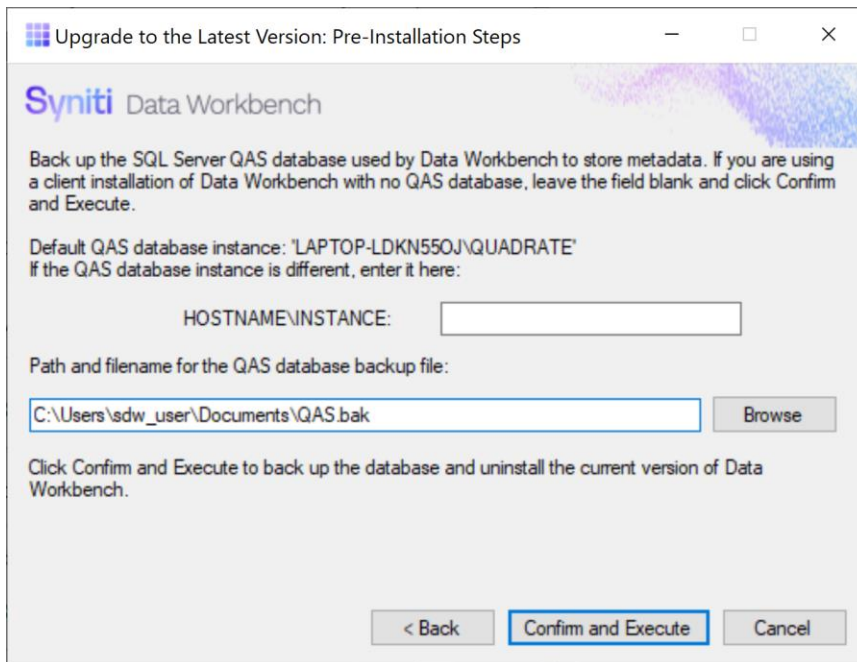


4. Make sure that **Start the process...** is selected.
5. Click **Next**.
The first step is to back up the QAS database used by Data Workbench to store user and template details.

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The default database instance is QUADRATE on the local system, but you may be using a different database instance, locally or on a remote server.



6. To use the default location and login details for the SQL Server QUADRATE instance, leave the HOSTNAME/INSTANCE field blank.

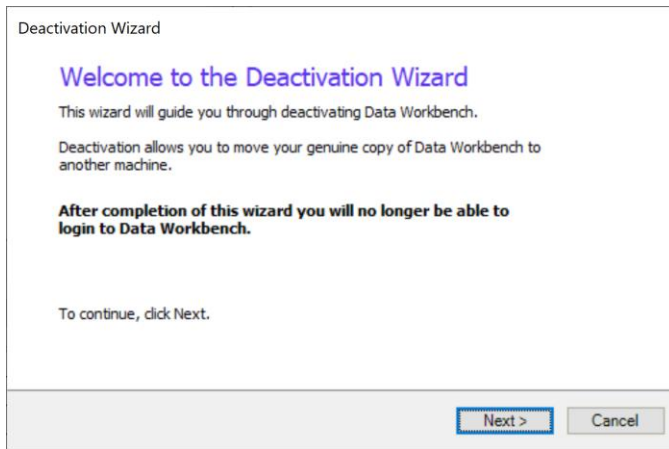
To back up the QAS database in a different SQL Server instance, type the server name and the instance name.

7. Type a location to save a backup of the QAS database. You will later restore the database from this location.
8. Click **Confirm and Execute**. The Install Upgrade Tool creates a backup of the database.
9. Click **Yes** to confirm that you want to proceed with an uninstall of the current version of Data Workbench.

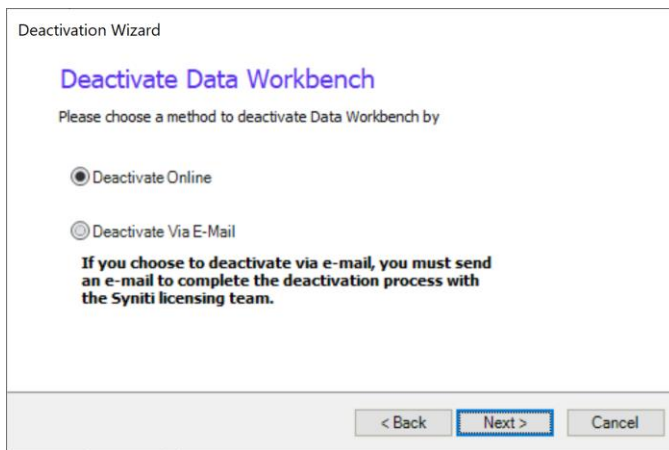
NOTE: Depending on your Windows security settings, you may need to explicitly allow the uninstall application to run.

Syniti Data Workbench

10. If the Data Workbench license has not been deactivated, the Deactivation wizard is launched.



11. Click **Next**.

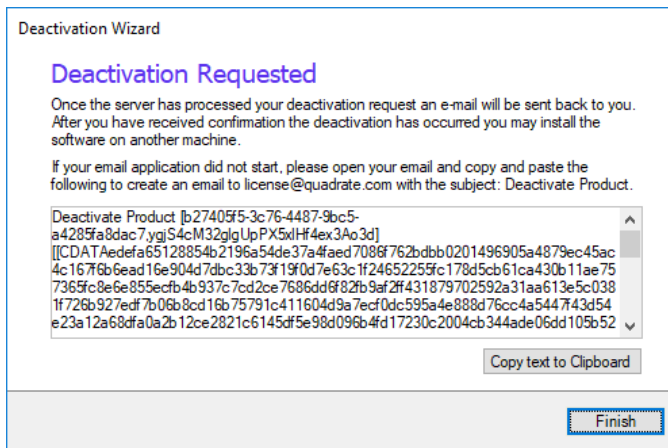


12. Choose either **Deactivate Online** or **Deactivate Via E-Mail**. Deactivating online is preferable because it is instant and does not require confirmation from the Syniti licensing team. If you choose to deactivate via email, be sure to send the email as requested in the wizard to complete deactivation.

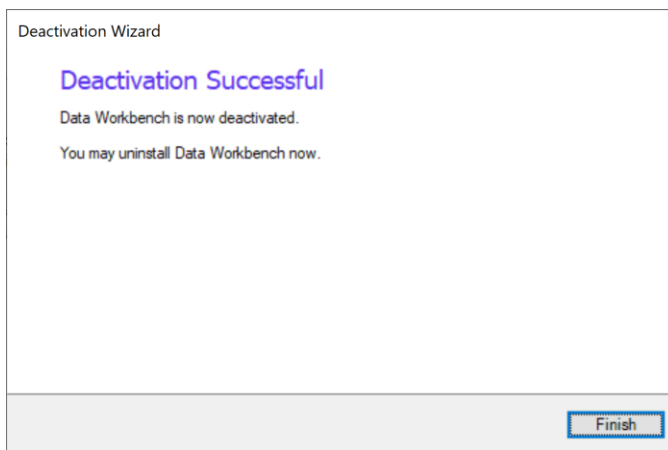
13. Click **Next** to start the deactivation process.

For email deactivation, either send an email using the default client displayed by the wizard or follow instructions in the wizard to manually create an email with the correct information.

Syniti Data Workbench

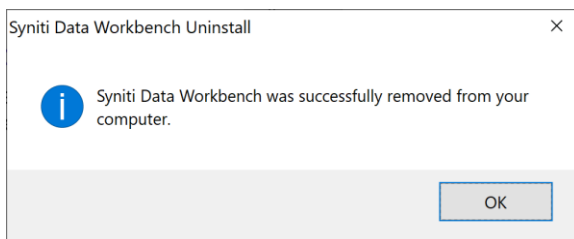


14. Click **Finish** to complete the deactivation process.



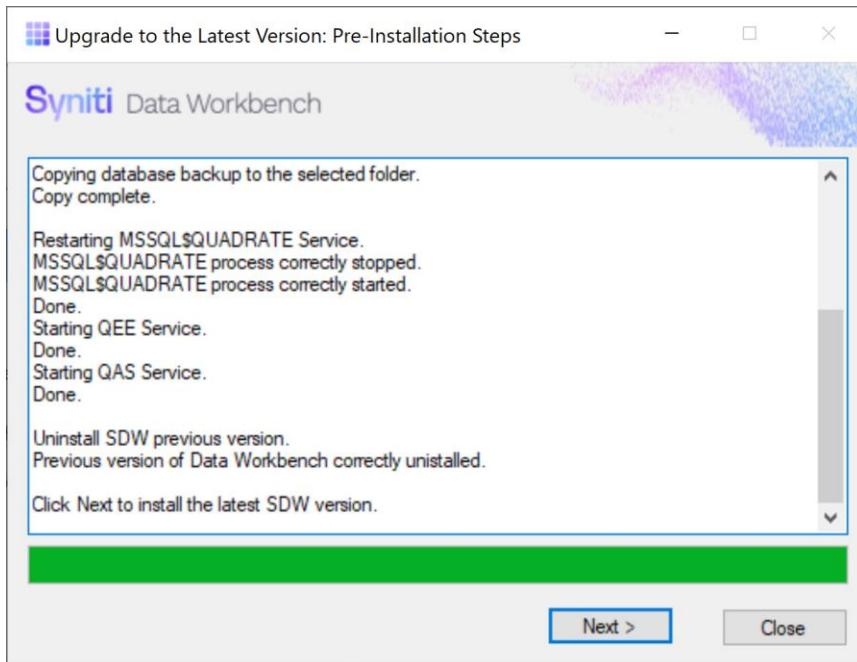
15. Click **Finish** to close the wizard and continue with the uninstall process.

16. Click **OK** when the uninstall process is complete.



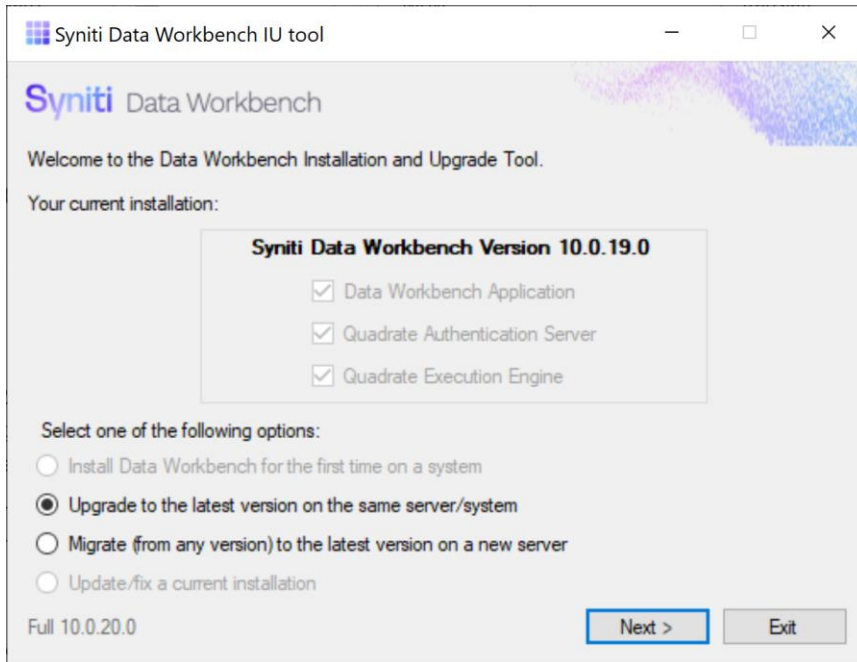
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17. In the Install Upgrade Tool, click **Close** to exit the tool so you can install a new SQL Server version.

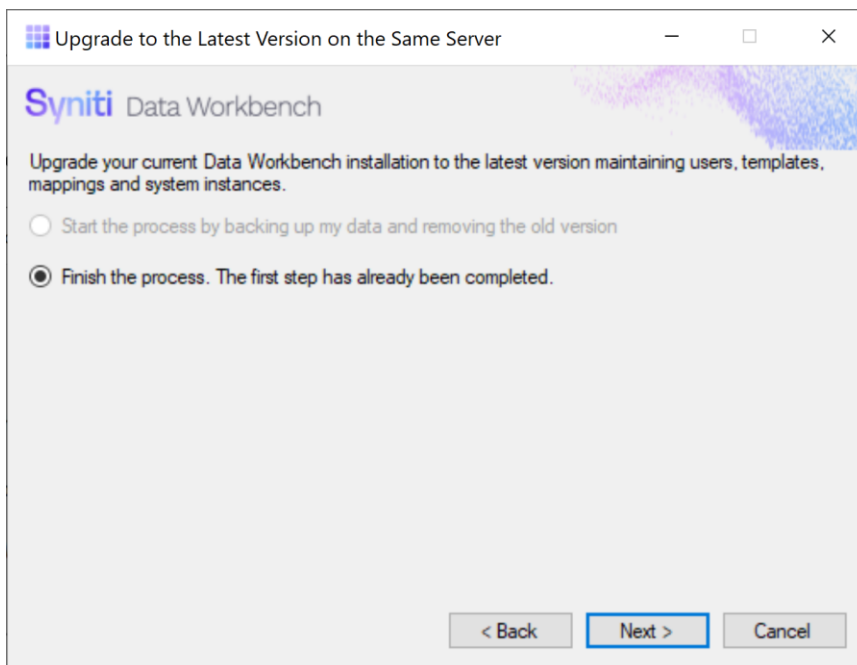


18. Install SQL Server according to instructions provided by Microsoft. It is highly recommended that a database administrator performs the installation and configures SQL Server. These steps involve running the SQL Server installer program to create a new instance.
19. Follow the steps below to ensure that SQL Server is set up correctly for the Data Workbench installation.
- 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.
20. Double-click on the self-extracting installation package **SynitiDataWorkbench_SelfExtractingSetup.exe**. The Syniti Data Workbench Install and Upgrade tool launches automatically.

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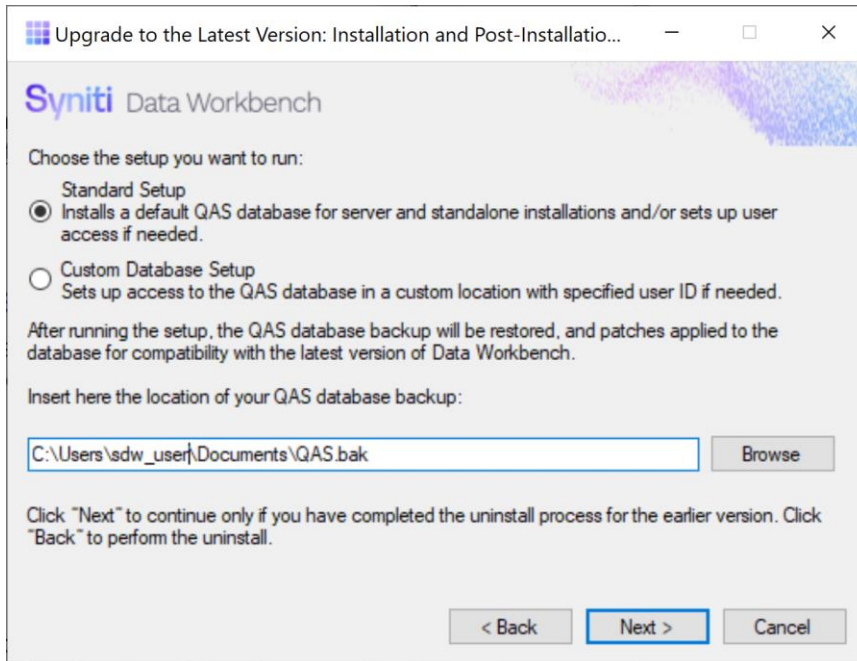
21. Make sure that **Upgrade to the latest version on the same server/system** is selected.
22. Choose the option **Finish the process...**



23. Choose either **Standard Setup** or **Custom Database Setup**, depending on the location of your QAS database.

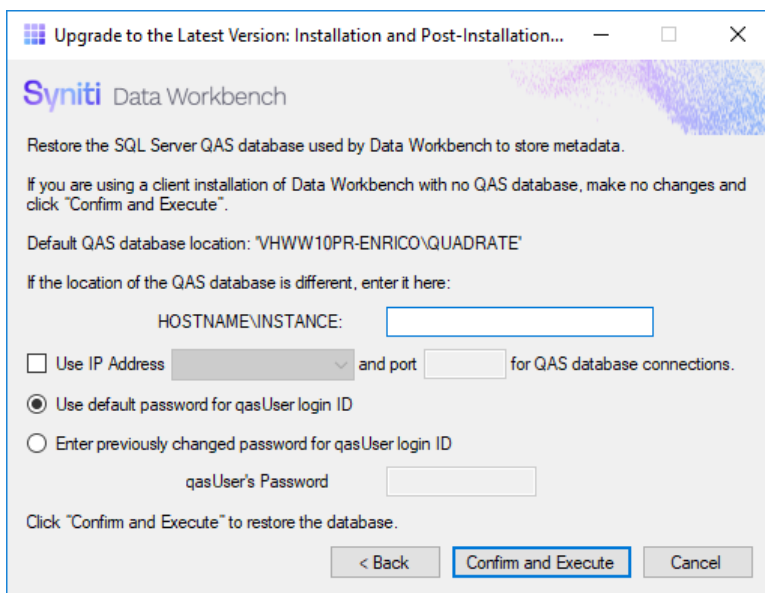
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24. If other than the default, enter the location of the Data Workbench QAS database backup file saved earlier.
25. Click **Next**.
26. If your SQL Server instance is named QUADRATE and it is installed locally with the default user name and password, click **Confirm and Execute**.

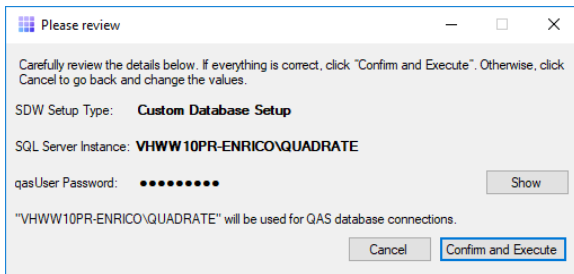
Otherwise, enter details for accessing the SQL Server instance where you want to restore the backed up QAS database.



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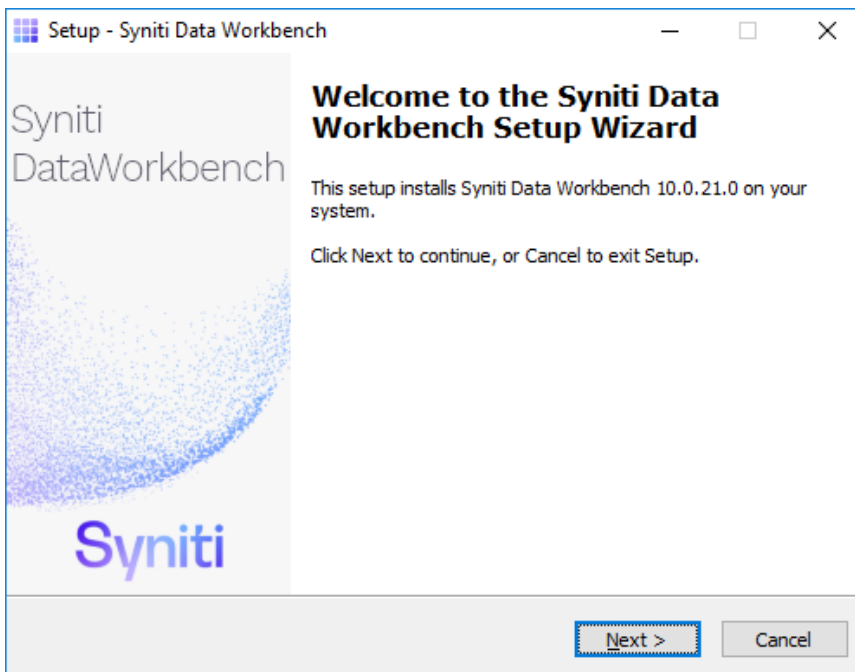
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27. In the “Please review” dialog, click **Confirm and Execute** to proceed with restoring the backup, or go back and make changes by clicking **Cancel**.

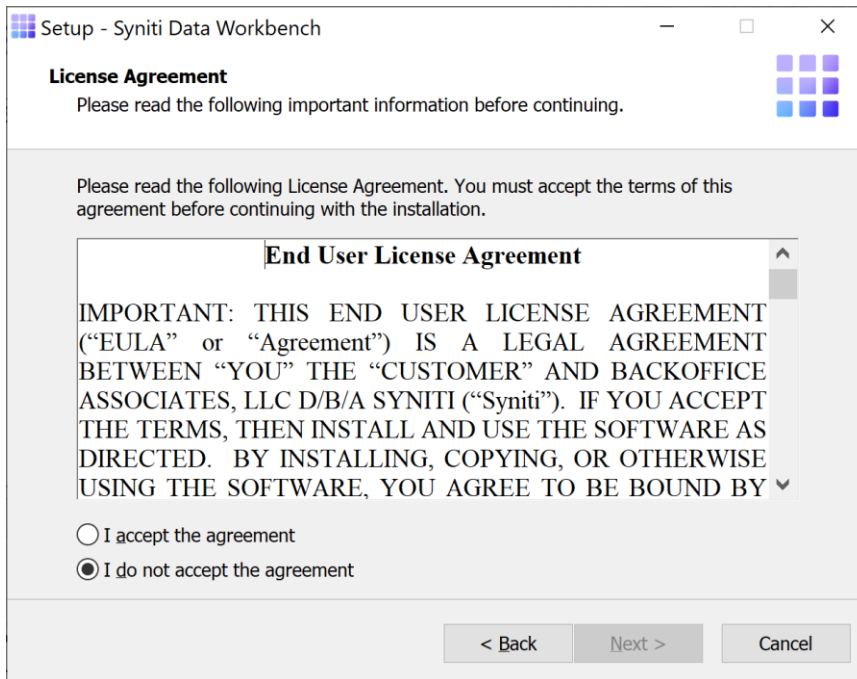


28. When you click **Confirm and Execute**, the Install Upgrade Tool checks the SQL Server instance. If the instance details are not correct, you are asked to reinsert them.

29. In Data Workbench Setup wizard, click **Next**.

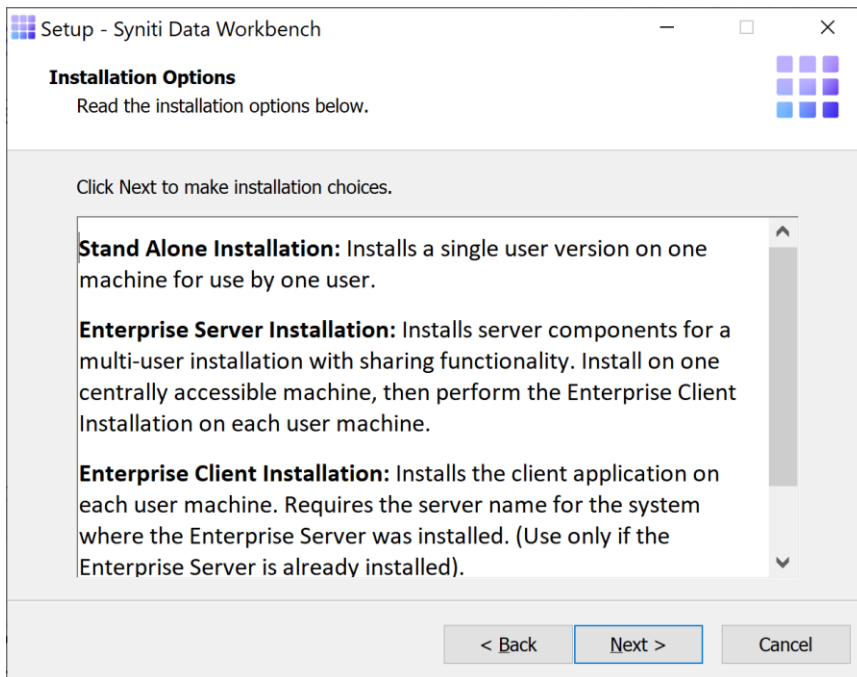


30. Review the agreement and click **I accept the agreement**.



31. Click **Next** to accept the agreement. If you do not accept the agreement, click **Cancel** to exit the installation procedure.

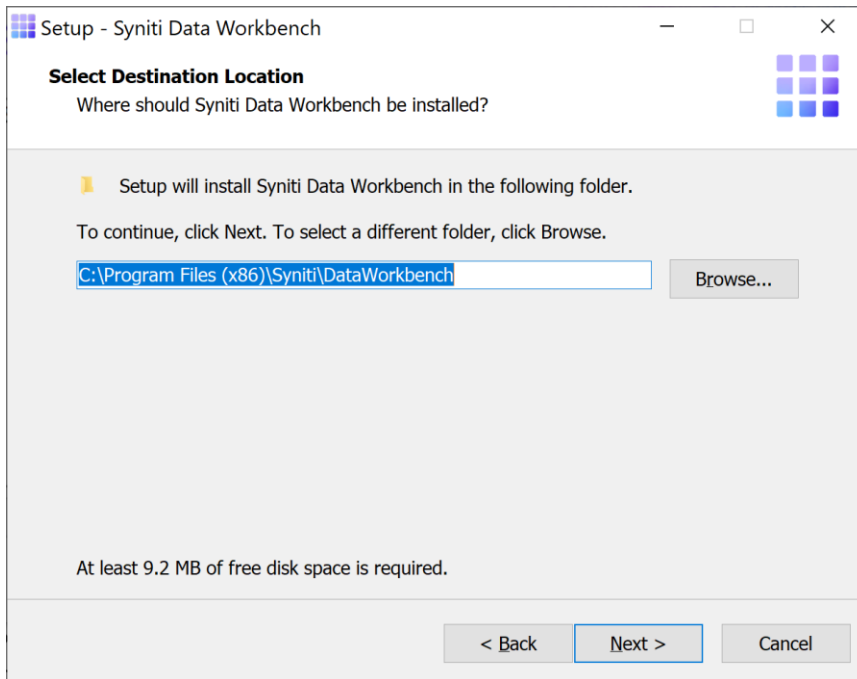
32. Review the installation options.



33. Click **Next** to continue.

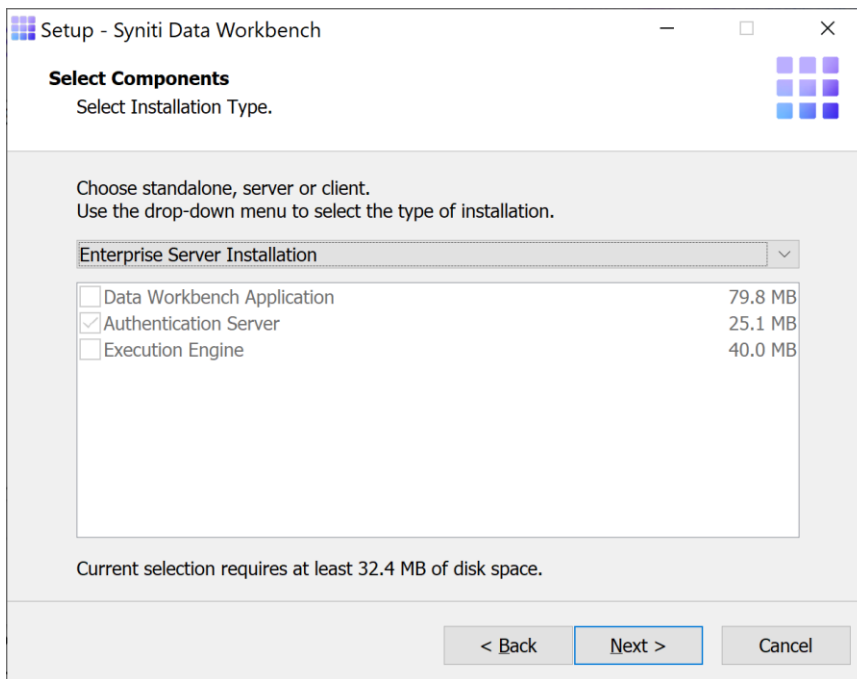
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34. Choose a location to install the Data Workbench files, or leave the default.



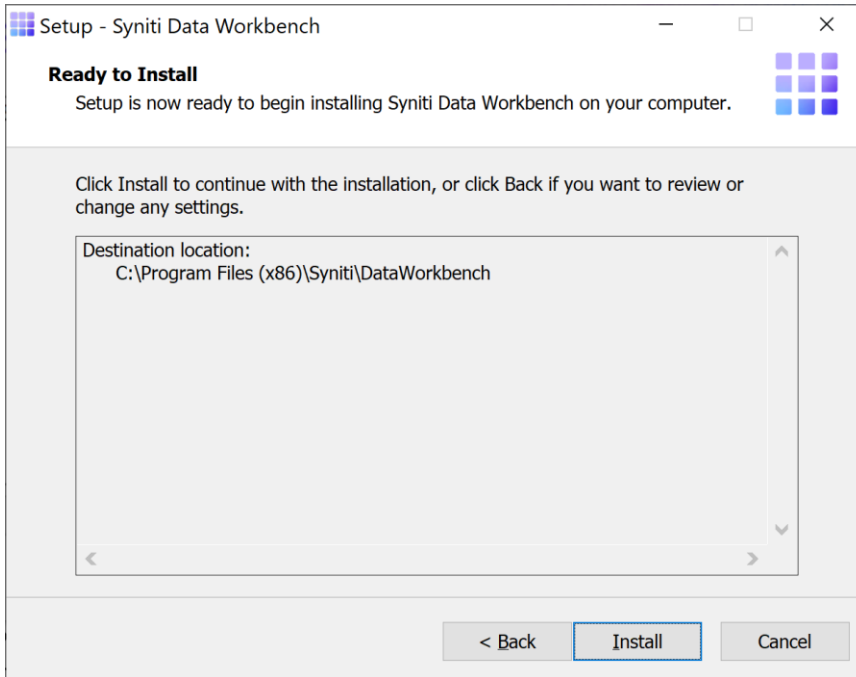
35. Click **Next** to continue.

36. On the Select Components page, select the appropriate option from the drop-down list.



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37. Click **Next**.



The Ready to Install page displays the required components that will also be installed. The components that may be installed are:

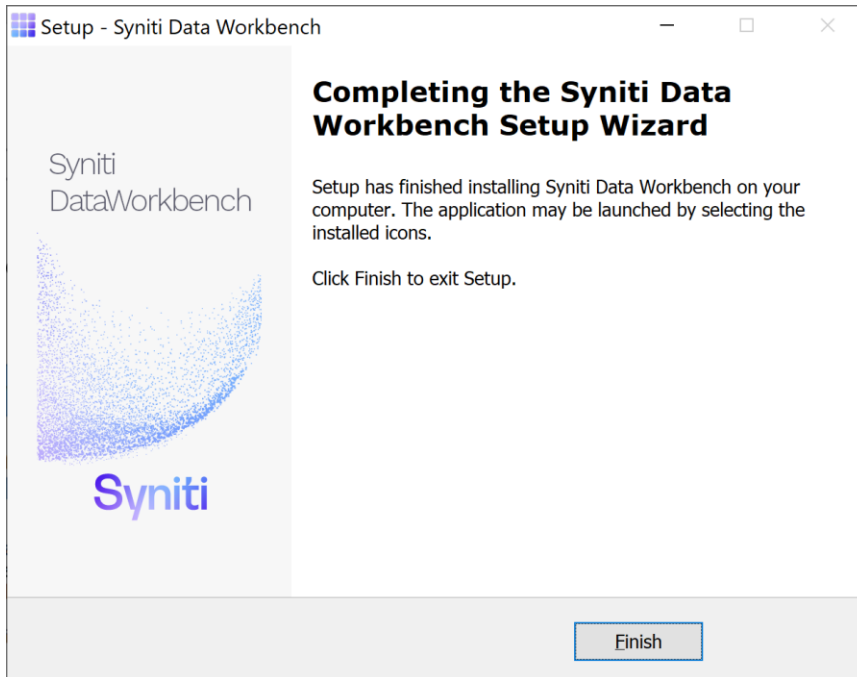
.NET Frameworks 4.5	Installed if your system is running a version of .NET Framework earlier than 4.5.
----------------------------	---

38. Click **Install**; to install required components and the Data Workbench application. Dependencies are downloaded.

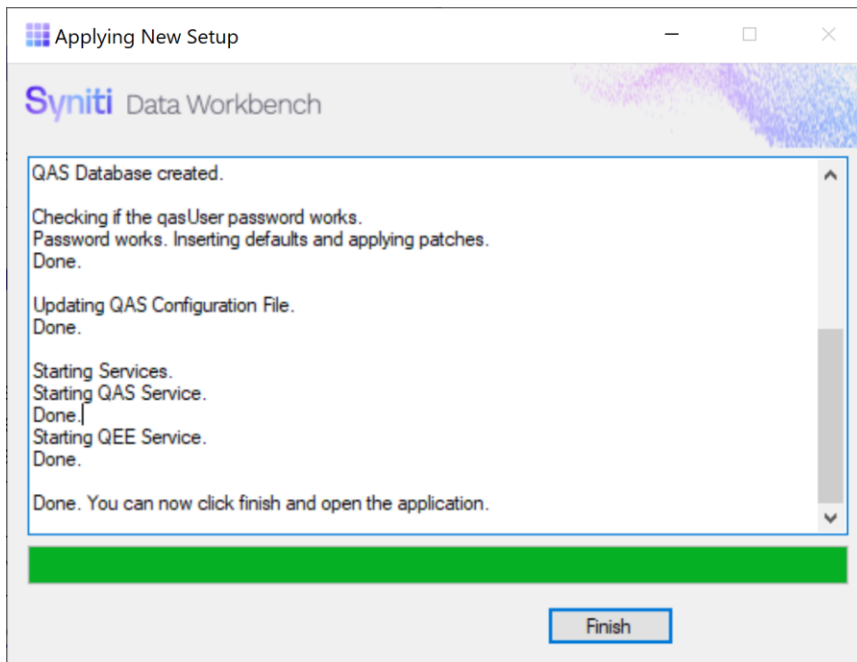
39. If .NET Framework is required, you may be asked to confirm download and installation. Do not skip this step.

40. Click **Finish** to complete the setup and return to the Install and Upgrade tool.

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The Install and Upgrade tool applies final configuration settings:



41. Click **Finish** to complete the installation.
42. On the system running SQL Server, check that the SQL Server Browser service is running.
43. If using Windows firewall, check that exceptions have been set up to allow connections for Data Workbench.

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44. The next step is to [Activate Data Workbench](#).

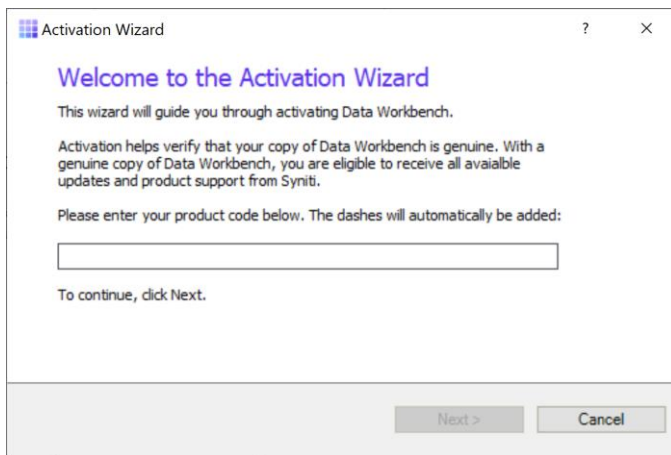
Activate Data Workbench

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.

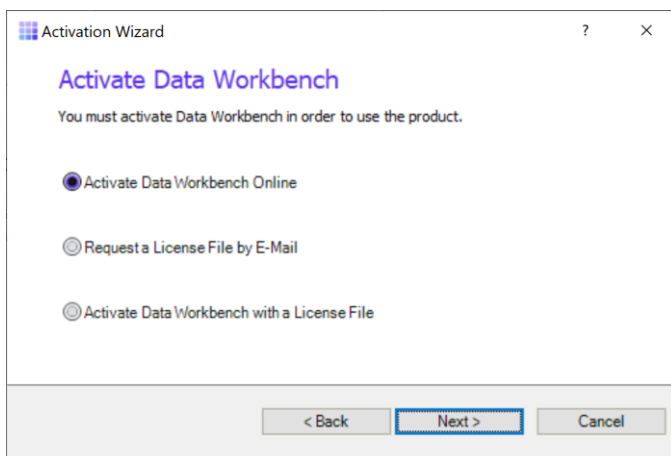
1. Online Activation
2. Offline License File Activation

Online Activation

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



2. Click **Next**.
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.

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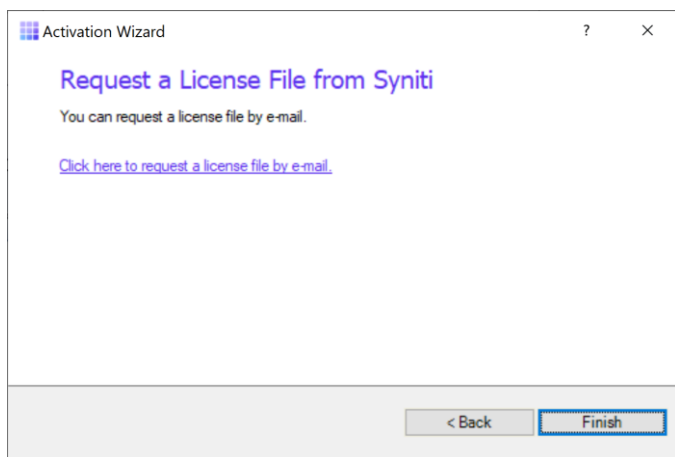
Syniti Data Workbench

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

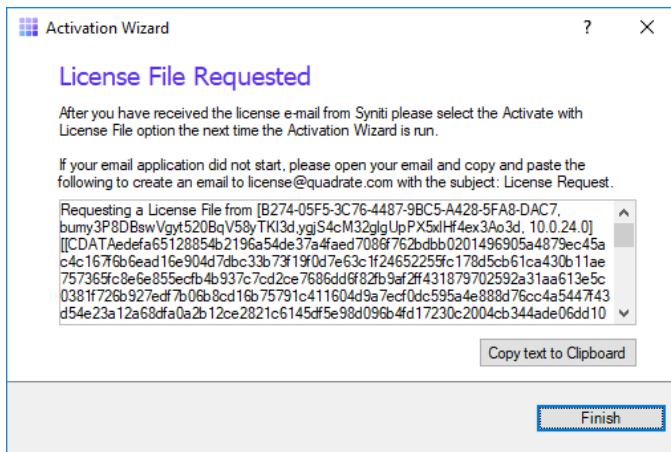
1. Enter the product key in the text box on the first page of the Activation Wizard.
2. Click **Next**.
3. Select the option: **Request a License File by E-Mail**.
4. Click **Next** to continue.



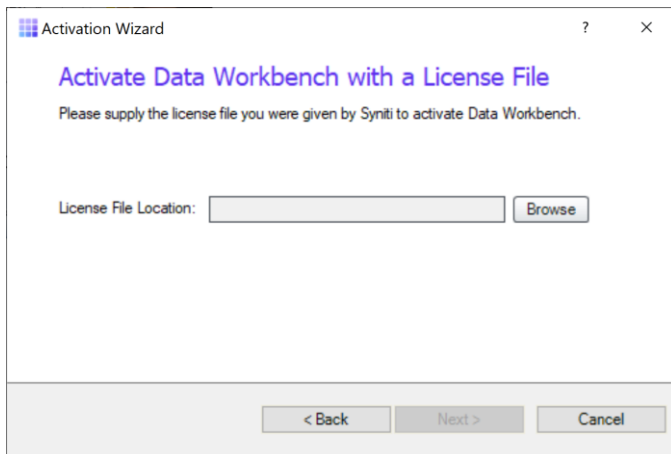
5. Choose the **Click here to request a license file by e-mail** option to open an email client with a message to send to the Syniti licensing team.
6. Click **Send** to send the email.

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](#).

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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 one of the IDs that was stored in the QAS database from your previous installation.

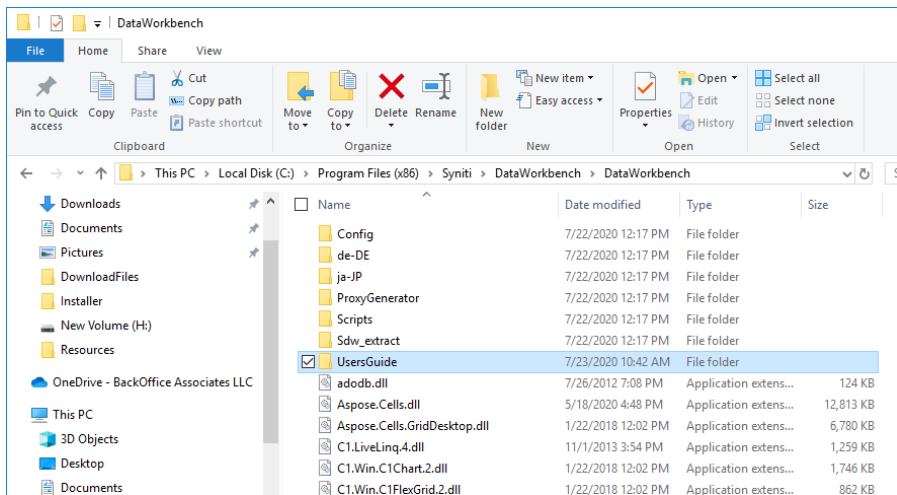
If you encounter issues or have questions about running this version of Data Workbench, check the [user's guide](#) or contact the support team via the [Help Center](#).

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Set up Local Help

The default User's Guide is located on a central server (<https://sdwhelp.syniti.com/100/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.

Customize Installation

It is possible to install and uninstall Data Workbench from the Windows command prompt, or from within a .bat script. This approach is most typically used for managing client installations.

Create an Uninstall Package

NOTE: If you plan to uninstall a non-client version from the command line, you need to deactivate the license for the current version first, using the Deactivate License wizard in the Syniti Configuration and Diagnostic Utility available from the Windows **Start** menu.

To uninstall Data Workbench version 9.x silently, run:

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```
"C:\Program Files (x86)\Quadrant\unins000.exe" /verysilent
```

Check that the pathname to unins000.exe matches the pathname on your system.

Create an Install Package

Use the following steps to create a silent install package, particularly useful for client installations.

1. In a web browser, go to: <https://www.syniti.com/sdw-download-links/>.
2. Enter your Data Workbench product 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 link **SynitiDataWorkbench_10.0.x_Manual_Install.zip** to download the client setup zip file containing **DataWorkbenchSetup.exe**.
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.
6. Copy the **DataWorkbenchSetup.exe** to the first client PC.
7. Open a Windows command prompt.
8. Change directory to the folder containing the **DataWorkbenchSetup.exe**.
9. Run the setup with the /SAVEINF option:
`DataWorkbenchSetup.exe /SAVEINF="unattended.inf"`
where `unattended.inf` is the name of a file that will contain the setup choices.
10. Complete the installation as normal, selecting Enterprise Client as the installation type.
11. Copy the `DataWorkbenchSetup.exe` and the `unattended.inf` file to the same folder on the next (and all subsequent) clients.
12. Open a Windows command prompt.
13. Change directory to the directory containing the `DataWorkbenchSetup.exe` and the `unattended.inf` files.
NOTE: You might want to create a .bat file with the following command.
14. Run the setup silently as follows, updating the items in *Italics*:
`DataWorkbenchSetup.exe /VERYSILENT /LOADINF="unattended.inf" /QASSERVER=qasservername /SUPPRESSMSGBOXES /LOG="path/filename" /NORESTART`

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.

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.

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/QEEPOR=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 <i>This will install... Do you wish to continue?</i> prompt at the beginning of setup. Has no effect if the DisableStartupPrompt [Setup] section directive was set to yes.
/SILENT, /VERYSILENT	<p>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 <i>Reboot now?</i> message is displayed.</p> <p>VERY SILENT: wizard, background window, installation progress window, Reboot now message are not displayed.</p> <p>Always displayed: error messages during installation, startup prompt (if not disabled with DisableStartupPrompt or the '/SP-' command line option).</p>
/SUPPRESSMSGBOXES	<p>Suppresses message boxes. Only has an effect when combined with '/SILENT' and '/VERYSILENT'.</p> <p>Default response when a choice is offered:</p> <p>Yes in a 'Keep newer file?' situation.</p> <p>No in a 'File exists, confirm overwrite.' situation.</p> <p>Abort in Abort/Retry situations.</p> <p>Cancel in Retry/Cancel situations.</p> <p>Yes (=continue) in a DiskSpaceWarning/DirExists/DirDoesntExist/NoUninstallWarning/ExitSetupMessage/ConfirmUninstall situation.</p> <p>Yes (=restart) in a FinishedRestartMessage/UninstalledAndNeedsRestart situation.</p> <p>5 message boxes are not suppressible:</p> <p>The About Setup message box.</p> <p>The Exit Setup? message box.</p> <p>Any (error) message box displayed before Setup (or Uninstall) could read the command line parameters.</p> <p>Any message box displayed by [Code] support function MsgBox.</p>
/LOG	<p>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.</p> <p>The log file is created with a unique name based on the current date. (It will not overwrite or append to existing files.)</p> <p>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.</p>

/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 checking the 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. <i>language</i> specifies the internal name of the language as specified in a [Languages] section entry. When a valid /LANG parameter is used, the <i>Select Language</i> dialog will be suppressed.
/DIR="x:\dirname"	Overrides the default directory name displayed on the <i>Select Destination Location</i> wizard page. A fully qualified pathname must be specified.
/GROUP="folder name"	Overrides the default folder name displayed on the <i>Select Start Menu Folder</i> wizard page. If the [Setup] section directive DisableProgramGroupPage was set to yes, this command line parameter is ignored.

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.

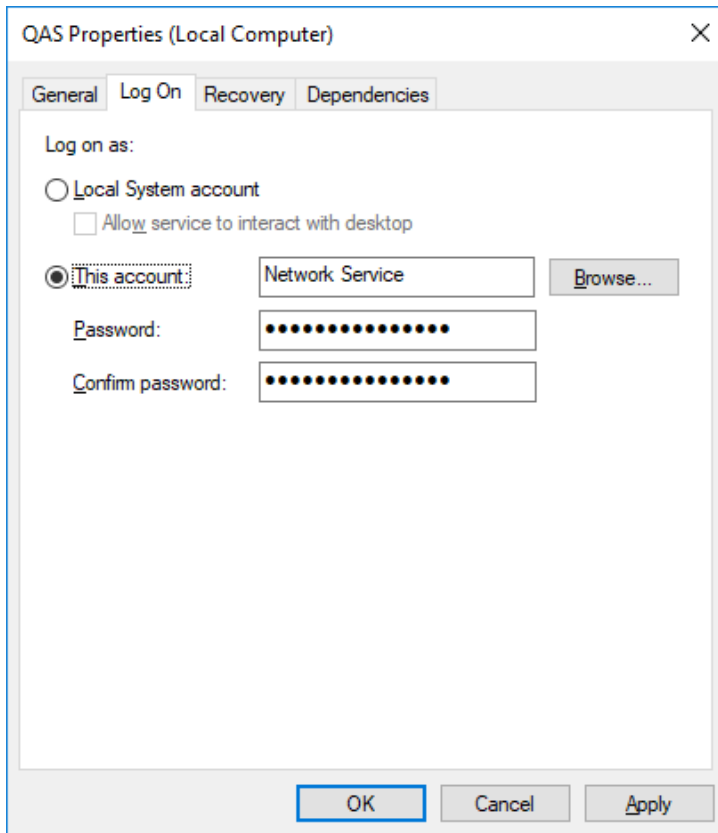
Communication to the SMTP (Email) server is also performed under the Local System account. This could cause problems where anonymous users do not have permission to send emails outside the company domain. If external email addresses will be used for notification emails, the account for the Execution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

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4. Double-click the **Quadrate Execution Engine** entry.



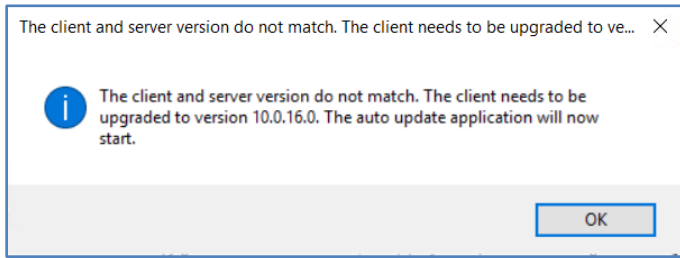
5. Click the **Log On** tab.
6. Select the **This account** option.
7. Enter the new username.
8. Enter and re-enter the password in the **Password** and **Confirm password** text boxes.
9. Click **OK** to close the dialog.
10. In the Services window, right-click the **Quadrate Execution Engine** entry and select **Restart**.

Troubleshooting

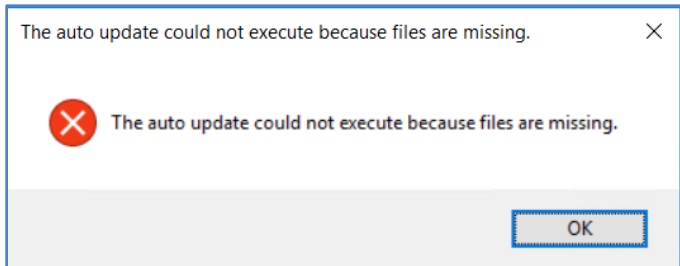
Client and Server Version do not Match

For enterprise server and client installations, the following message may appear if you have upgraded either the client or server, but not both, and you try to start Data Workbench:

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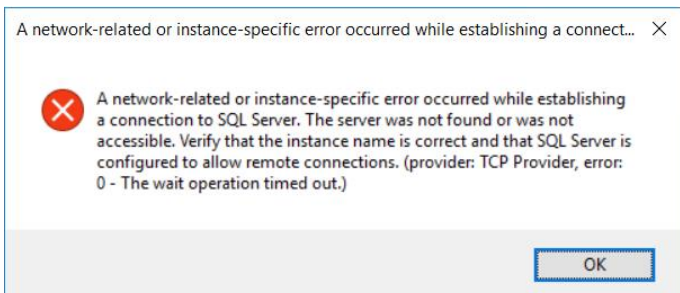


At this time, the auto update application is not available, so you will see the following message when you click **OK**.



Unable to Connect to Enterprise Server

Data Workbench Clients have been set up to connect to the server using an IP address, but when they try to connect, the following error occurs.



After checking to see that the correct IP address has been defined for the client in the User Preferences dialog, if the error still occurs, the most likely cause is that the QAS database has stored the machine name instead of the IP address. The recommended way to fix this issue is to run the Install Upgrade Tool using the self-extracting installation package **SynitiDataWorkbench_SelfExtractingSetup.exe**. Choose the Update/Fix option and check the IP Address option. Enter your IP address and port number.

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.

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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

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.

1. Open the **SQL Server Configuration Manager**.
2. Right-click **SQL Server Browser**, and choose **Properties**.
3. On the *SQL Server Browser Properties* page, click the **Advanced** tab.
4. Locate and make a note of the instance ID in the property list.
5. Click **OK**.

2. Create an Exception for SQL Server in Windows Firewall

To 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

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

1. Click **Allow an app or feature through Windows firewall**.
2. If needed, click **Change settings** in the next page.
3. Click **Allow another app...** in the bottom right corner.
4. Click **Browse** to navigate to **C:\Program Files\Microsoft SQL Server\90\Shared\sqlbrowser.exe**.
5. Click **Open**.
6. Click **OK**.

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

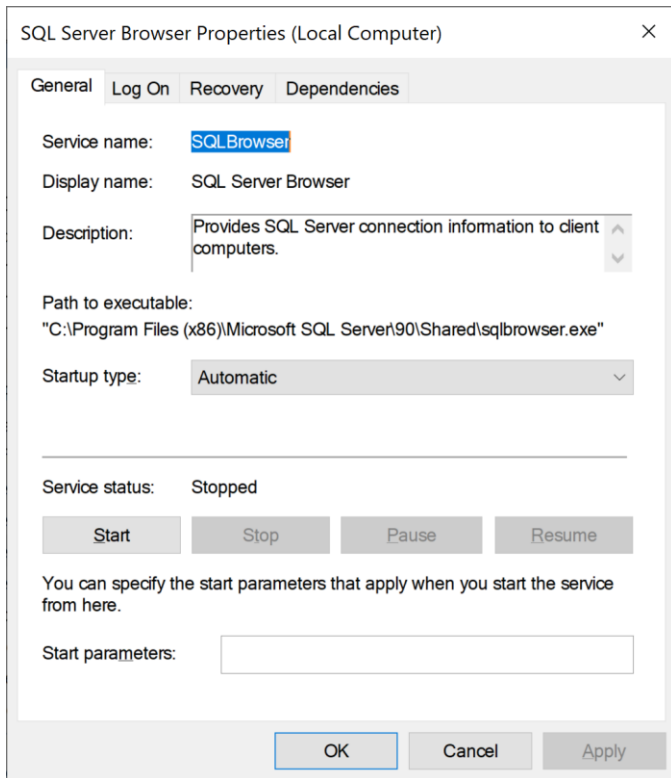
Clients Unable to Connect – SQL Server Browser Service

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**.

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3. Change **Startup Type** from **Disabled** to **Automatic**.



4. Click **Apply**.
5. Click **Start**.
6. Click **OK**.

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Specified qasUser Password Does Not Work

During upgrade, if you have entered a password in the Install Upgrade Tool screen:

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Fix current QAS database used by Data Workbench to store metadata.

- Insert database defaults
- Check Data Workbench version against database version
- Repair connection string

Default QAS database location: 'DESKTOP-VPK2I11\QUADRATE

If the location of the QAS database is different, enter it here:

HOSTNAME\INSTANCE:

Use IP Address and port for QAS database connections.

Use default password for qasUser login ID

Enter previously changed password for qasUser login ID

qasUser's Password

Click on "Confirm and Execute" to continue.

The following message can appear:

“qasUser password does not work. qasUser password has been restored to the default. Check the Installation/Upgrade Guide for details”

The default password is **Qu@dr8q@s**.

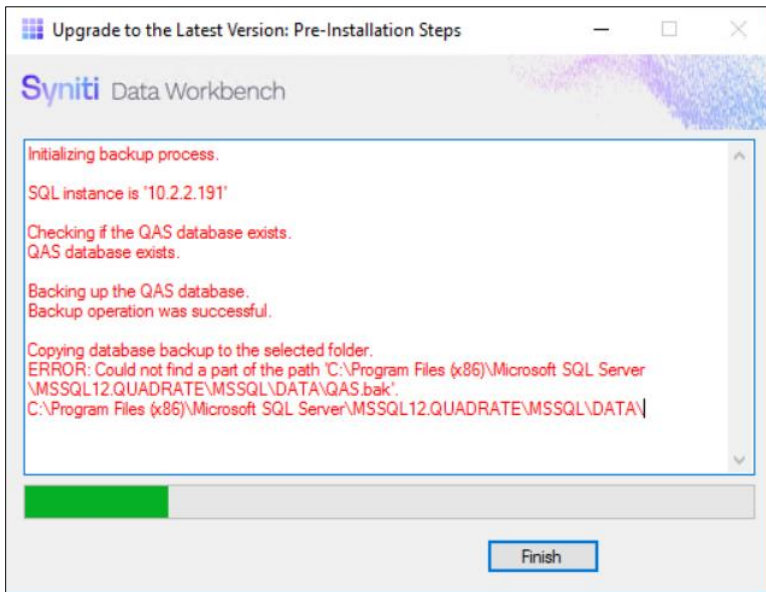
You can change this password after installation using the SQL Server Management Studio, or by executing the following SQL:

```
ALTER LOGIN [qasUser] WITH PASSWORD=N'Qu@dr8q@s'
```

Issue Upgrading with a Remote SQL Server

To upgrade from earlier versions to Data Workbench 10.0 with a remote SQL Server QAS database, you need to perform the uninstall using unins000.exe from Add/Remove Programs, then run the Install Upgrade Tool to install the new version. (See [Upgrade Data Workbench with Remote SQL Server](#).) If you accidentally start the uninstall using the Install Upgrade tool, you will eventually receive the following error:

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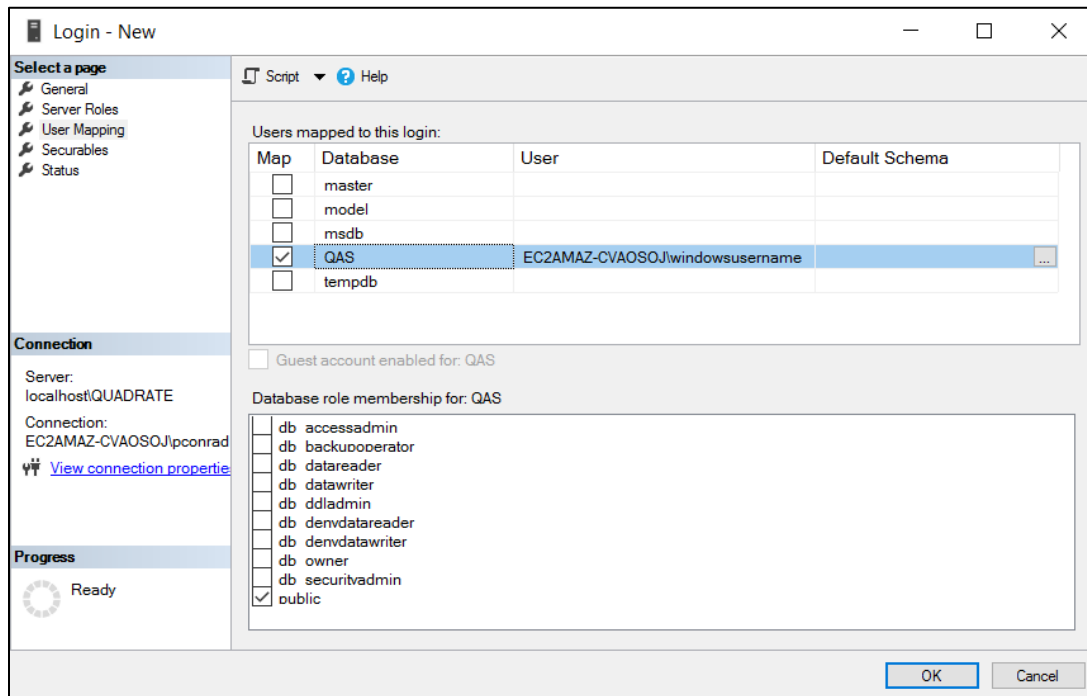
Click Finish to exit the Install Upgrade Tool, and follow the instructions described in [Upgrade Data Workbench with Remote SQL Server](#).

Error Accessing SQL Server while Backing Up QAS Database

When using the Install and Upgrade tool to upgrade to Data Workbench 10.0, the first step is to create a backup for the QAS database using Windows authentication for SQL Server. If your Windows login ID is not enabled as a login ID for the QAS database, this step fails and you cannot continue the upgrade process. To change the SQL Server permissions on QAS for your Windows login:

1. Open SQL Server Management Studio.
2. In the Login Name field, type the Windows login ID.
3. On the Server Roles tab, make sure that the **public** option is checked.

4. On the User Mapping tab, check **QAS**.



5. Click **OK** to make the changes.

Last Updated: October 7, 2020