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Data Workbench

Installation Guide Version 2

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Overview

This document describes in detail how to install Quadrate's Data Workbench software. Both installation types, Stand Alone and Enterprise Server, are described in this document.

System Requirements

- x86 Processor: 1.0 GHz or x64 Processor: 1.4 GHz; 2.0 GHz or faster recommended
- 512 megabytes (MB) of RAM or more; 1 gigabyte (GB) or more recommended
- Approximately 811 MB of available hard-disk space for the recommended installation
- 50 MB or more per user for template storage
- Super-VGA (800x600) or higher resolution monitor
- Keyboard and Microsoft Mouse or compatible pointing device
- Supported Operating Systems (64 and 32 bit):
 - o Microsoft Windows 8 and 8.1
 - o Microsoft Windows 10
 - Microsoft Windows Server 2012 R2
- SAP GUI installed locally
- Components installed (where required):
 - o Microsoft .NET Framework 3.5 (Enabled in Windows features)
 - o Windows Installer Version 3.1 or later
 - o MDAC Components 2.8 SP1 or later
 - o Microsoft SQL Server 2014 Express (Optionally can use your own SQL Database Server)

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 Stand Alone 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 enables 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 (DataWorkbenchSetup.exe).
- 2. Click **Next** on the *Welcome* page (see Figure 1).



Figure 1

3. Read through the end-user license agreement and click the **I accept the agreement** option and then the **Next** button if you accept the agreement. If you do not accept the agreement, click the **Cancel** button to exit the installation procedure (see Figure 2).

🕜 Setup - Data Workbench —		×
License Agreement Please read the following important information before continuing.		
Please read the following License Agreement. You must accept the terms of t agreement before continuing with the installation.	his	_
ERP ²		^
End-user license agreement		
IMPORTANT: THIS END USER LICENSE AGREEM ("EULA" or "Agreement") IS A LEGAL AGREEM BETWEEN "YOU" THE "CUSTOMER" AND QUADR/ OWNED AND OPERATED BY BACKOFF	ENT ENT ATE FICE	Ŷ
 I accept the agreement I do not accept the agreement 		
< <u>B</u> ack <u>N</u> ext >	Ca	incel

Figure 2

NOTE: If you select **Cancel**, ERP² will <u>not</u> be installed or usable.

4. Read through the *Installation Type Information* page. Click the **Next** button to continue (see Figure 3).

🛷 Setup - Data Workbench — 🛛	×
Information Please read the following important information before continuing.	
When you are ready to continue with Setup, click Next.	
Important Information regarding Installation Options	^
Stand Alone Installation Installs a single user version of the Data Workbench on one machine for use by one user.	
Enterprise Server Installation 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.	
	~
< <u>B</u> ack <u>N</u> ext >	Cancel

Figure 3

5. On the *Select Components* page (see Figure 4), accept the default value of **Stand Alone Installation** and click the **Next** button.

🛷 Setup - Data Workbench	_		×
Select Components Which components should be installed?			
Select the components you want to install; clear the components install. Click Next when you are ready to continue.	you do not	want to	
Stand Alone Installation		~	
Data Workbench Application		100.6 MB	3
Quadrate Authentication Server		22.1 MB	
Quadrate Execution Engine		31.0 MB	}
Current selection requires at least 160.0 MB of disk space.			
< Back	<u>l</u> ext >	Can	cel

Figure 4

The final page of the installation (see Figure 5) displays which required components will also be installed. The components that may be installed are listed below.

🟈 Setup - Data Workbench	-		×
Ready to Install Setup is now ready to begin installing Data Workbe	nch on your computer.		
Click Install to continue with the installation, or click change any settings.	(Back if you want to re	view or	
Dependencies to install: .NET Framework 2.0 SQL Express Destination location:			^
C:\Program Files (x86)\Quadrate			
<		>	~
<	<u>B</u> ack <u>I</u> nstall		ancel

Figure 5

.NET Framework

The .NET Framework is a Microsoft component that provides the development platform upon which the Data Workbench has been developed. If required, Windows will detect that .NET Framework 3.5 (includes .NET 2.0 and .NET 3.0) needs to be installed and will download it. This feature must be enabled to run the Data Workbench application (see Figure 6).

		\times
÷	📷 Windows Features	
	An app on your PC needs the following Windows feature:	
	.NET Framework 3.5 (includes .NET 2.0 and 3.0)	
	Download and install this feature	
	Windows will get the files that it needs from Windows Update and complete the installation.	
	→ Skip this installation Your apps might not work correctly without this feature.	
	Tell me more about this feature	
	Cance	

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. Browse to a temporary directory for extracted files or click **Ok** button to accept the default (see Figure 7).

🟈 Setup - Data Workbench		- 🗆 X
Installing Required Depe Please wait while the req minutes.	endencies uired dependencies are installed. 1	'his may take a few
Installing Supporting Files SQL Express Choose Dir	: ectory For Extracted Files	×
Choose D	lirectory For Extracted Files	
	Ok Cancel Bro	wse



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- 8. Once the installation is completed, click the **Finish** button to exit the installer.
- **NOTE**: If an error is received during the SQL server installation, cancel the Data WorkBench install, and refer to the section *SQL Server Installation* for the steps on how to manually install the SQL Server.





Performing an Enterprise Installation

Server Installation

The following steps must be followed if a dedicated machine will be used to host the server components of the Data Workbench.

- **NOTE**: If one of the users will host the server components, refer to *Performing a Stand Alone Installation* for more information. All other users must follow the instructions in *Client Installation*.
- 1. Run the installation application (DataWorkbenchSetup.exe).
- 2. Click **Next** on the *Welcome* page.
- 3. Read through the end-user license agreement and click the **I accept the agreement** option and then the **Next** button if you accept the agreement. If you do not accept the agreement, click the **Cancel** button to exit the installation procedure.

NOTE: If you select Cancel, ERP² will <u>not</u> be installed or usable.

- 4. Read through the *Installation Type Information* page. Click the **Next** button to continue.
- 5. On the *Select Components* page (see Figure 9), select **Enterprise Server Installation** from the drop down list and click the **Next** button.

🟈 Setup - Data Workbench	—		\times
Select Components Which components should be installed?			
Select the components you want to install; clear the components you install. Click Next when you are ready to continue.	ou do not	: want to	_
Enterprise Server Installation		~	
Data Workbench Application		97.5 MB	1
Quadrate Authentication Server		19.1 MB	
Quadrate Execution Engine		28.0 MB	
Current selection requires at least 25.4 MB of disk space.			
< Back Net	<t></t>	Cano	el

Figure 9

The final page of the installation (see Figure 10) displays which required components will also be installed. The components that may be installed are listed below.

💣 Setup - Data Workbench —		×
Ready to Install Setup is now ready to begin installing Data Workbench on your computer.		
Click Install to continue with the installation, or click Back if you want to rev change any settings.	view or	
Dependencies to install: .NET Framework 2.0 SQL Express Destination location: C:\Program Files (x86)\Quadrate		^
<	>	~
< <u>B</u> ack Install] (ancel

Figure 10

.NET Framework

The .NET Framework is a Microsoft component that provides the development platform upon which the Data Workbench has been developed. If required, Windows will detect that .NET Framework 3.5 (includes .NET 2.0 and .NET 3.0) needs to be installed and will download it. It is required that this feature is enabled in order to run the Data Workbench application (see Figure 11).

		×
÷	Windows Features	
	An app on your PC needs the following Windows feature:	
	.NET Framework 3.5 (includes .NET 2.0 and 3.0)	
	Download and install this feature Windows will get the files that it needs from Windows Update and complete the installation.	
	→ Skip this installation Your apps might not work correctly without this feature.	
	Tell me more about this feature	
	Cance	

Figure 11

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. Browse to a temporary directory for extracted files or click **Ok** to accept the default (see Figure 12).





8. Once the installation is complete, click the **Finish** button to exit the installer.

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Figure 15

9.

Client Installation

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

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

NOTE: If you select **Cancel**, ERP² will <u>not</u> be installed or usable.

- 4. Read through the Installation Type Information page. Click the Next button to continue.
- 5. On the *Select Components* page (see Figure 14), select **Enterprise Client Installation** from the drop down list and click the **Next** button.

elect Compone	nte		-
Which compone	nts should be installed?		i
Select the comp install. Click Nex	onents you want to install; clear t t when you are ready to continue	:he components yo ».	u do not want to
Enterprise Clier	t Installation		
🖌 Data Workb	ench Application		100.6 M
Quadrate A	uthentication Server		22.1 M
	xecution Engine		31.0 M
Current selectio	n requires at least 137.9 MB of di	sk space.	
		< Back Nex	t> Car

The *Enterprise Server Setup* page (see Figure 15) 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 complete.

7	Setup - E	ata Workbench	- 🗆 🗙
Enterprise Se Enter the po	r ver Setup ort that the enterprise serv	er service will run on	
Enter the se localhost	rver name that the Enterp	rise Server is running on:	
Enter the po 3333	rt that the Enterprise Serv	er is running on:	
		< <u>B</u> ack <u>N</u> ext	: > Cancel

Figure 15

The final page of the installation (see Figure 16) displays the required component that will also be installed.

.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.

🟈 Setup - Data Workbench	_		×
Ready to Install Setup is now ready to begin installing Data Workbench on your co	mputer.		
Click Install to continue with the installation, or click Back if you wa change any settings.	int to revie	w or	
Dependencies to install: .NET Framework 2.0		^	
Destination location: C:\Program Files (x86)\Quadrate			
<		>	
< <u>B</u> ack	nstall	Car	ncel

Figure 16

8. Once the installation is complete, click the **Finish** button to exit the installer.

Activating Data Workbench

When Data Workbench requires activation, an Activation Wizard displays when the Data Workbench Client runs. 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 Code into the text box on the first page of the Activation Wizard (see Figure 17) then click **Next**.

Activation Wizard	?	×
Welcome to the Activation Wizard		
This wizard will guide you through activating Data Workbench.		
Activation helps verify that your copy of Data Workbench is genuine. With a genuine copy of Data Workbench, you are eligible to receive all avaialble updates and product support from Quadrate.		
Please enter your product code below. The dashes will automatically be added:		
To continue, click Next.		
Next >	Car	ncel

Figure 17

2. Select the Activate Online option and click the Next button (see Figure 18).

Letivation Wizard	?	×
Activate Data Workbench		
You must activate Data Workbench in order to use the product.		
Activate Data Workbench Online		
Request a License File by E-Mail or Telephone		
Activate Data Workbench with a License File		
< Back Next >	Cano	cel

Figure 18

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 License File Activation

- 1. Enter the **Product Code** into the text box on the first page of the Activation Wizard (see Figure 17) and click **Next**.
- 2. Select the second option: **Request a License File by E-Mail or Telephone**. Click the **Next** button to continue (see Figure 18).
- 3. Click the Click here to request a license file by e-mail link.
- **NOTE**: 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* page 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 page (see Figure 19).



Figure 19

- 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 page of the Activation Wizard (see Figure 17).
- 7. Select the Activate Data Workbench with a License File option. Click the Next button to continue.
- 8. Select the **Browse** button shown in Figure 20 to locate the file that was saved in step 5. Click the **Next** button to continue.



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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 logging in. The default username and password is:

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 log on to any system in the system instance list. The administrator must grant user access to each system in the User Security section.

To add system instances:

- 1. Open ERP² and log on using default username and password.
- 2. Click the **Administration** tab.
- 3. Click the **Systems** button.
- 4. Click the **Add System** command (See Figure 21).
- 5. Select from your list of SAP connections.
- 6. Click OK.



Figure 21

To grant access to a system:

- 1. From the Administration tab, click the User/Group Management icon.
- 2. Drill down and select the relevant user.
- 3. Select the Administration tab.
- 4. Click the Allowed checkbox to grant or deny access to each system (See Figure 22).
- 5. Click the **Save** button.



Figure 22

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 must be changed to a user that has sufficient privileges to send external emails.

To change the user credentials of the service:

- 1. Open Control Panel.
- 2. Open Administrative Tools.
- 3. Open Services.
- 4. Double-click the Quadrate Execution Engine entry.
- 5. Click the **Log On** tab. (See Figure 23).

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- 6. Select the This account option.
- 7. Enter the new username in the first text box adjacent to the **This account** option.
- 8. Enter and re-enter the password in the **Password** and **Confirm password** text boxes.
- 9. Click the **OK** button.
- 10. Right-click the Quadrate Execution Engine entry and select the Restart option.

Quadrate Authentic	ation Serv	er Properties (L	ocal Compu	ıter)	×
General Log On	Recovery	Dependencies			
Log on as:					
Local System a Allow service	ccount e to interac	t with desktop			
This account:	Net	work Service		Browse	
Password:	••	•••••	••		
<u>C</u> onfirm passwo	ord: ••	•••••	••		
Help me configure	user accou	unt log on options	<u>.</u>		
		ОК	Cancel		ly

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 2014, 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 8.1. If you are using a different firewall system, see your firewall documentation for more information.

NOTE: If you are running a firewall on the computer that is running SQL Server 2014, external connections to SQL Server 2014 will be blocked unless SQL Server 2014 and the SQL Server Browser service can communicate through the firewall. You must create an exception for each instance of SQL Server 2014 that you want to accept remote connections and an exception for the SQL Server Browser service.

SQL Server 2014 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. On the Windows *Start* menu, select **Programs**> **Microsoft SQL Server 2014** > **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 2014 in Windows Firewall

To create an exception for SQL Server 2014 in Windows Firewall, follow these steps:

- 1. Search for "firewall" in the Windows 8 Start menu. Click Windows Firewall.
- 2. Click Allow an app or feature through Windows firewall in the Windows Firewall page.
- 3. Click **Change settings** in the next page.
- 4. Click **Allow another app...** in the bottom right corner.
- 5. Select an app to add in the window that pops up, and then click **Add** to add the exception to the list. In this case, navigate to C:**Program Files (x86)****Microsoft SQL Server****MSSQL12.QUADRATE****MSSQL\Binn**\ sqlservr.exe or whatever location SQL Server executable resides.

NOTE: The path may be different depending on where SQL Server 2014 is installed. MSSQL12.QUADRATE is a placeholder for the instance ID that you obtained in step 3 of the previous procedure.

6. Repeat steps 1 through 5 for each instance of SQL Server 2014 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 2014 is installed.

Windows Server 2012 Install

Adding .NET Framework Features

For Windows Server 2012, enabling the .NET Framework features cannot be automated so it must be done manually. .NET Framework 3.5 and 4.0 are required in order for the Data Workbench application to work correctly. Follow these steps for adding the .NET Framework features on Windows Server 2012.

1. From Server manager select Add Roles and features (See Figure 24).

1		Server Manager			_ O X
Server Ma	anager • Dashboard		• @ ሾ ⊮	lanage <u>T</u> ools	<u>V</u> iew <u>H</u> elp
Dashboard Local Server All Servers		configure this local server			
File and Storage Services P	QUICK START 2 3 WHAT'S NEW 4	Add roles and features Add other servers to manage Create a server group			
	LEARN MORE	Connect this server to cloud services			Hide
	File and Storage Services Manageability Events Performance BPA results	1 Local Server 1 Manageability Events Services Performance	All Servers Manageability Events Services Performance	1	v

Figure 24

2. If "Before you begin" section is available, click Next (see Figure 25).

6	Add Roles and Features Wizard
Before you begin	DESTINATION SERVER VM-QuadWin12R2
Before You Begin Installation Type Server Selection Server Roles Features Confirmation Results	This wizard helps you install roles, role services, or features. You determine which roles, role services, or features to install based on the computing needs of your organization, such as sharing documents, or hosting a website. To remove roles, role services, or features: Start the Remove Roles and Features Wizard Before you continue, verify that the following tasks have been completed: The Administrator account has a strong password Network settings, such as static IP addresses, are configured The most current security updates from Windows Update are installed If you must verify that any of the preceding prerequisites have been completed, close the wizard, complete the steps, and then run the wizard again. To continue, click Next.
	< Previous Next > Install Cancel

3. Select the Role-based or feature-based installation option and click Next (see Figure 26).

	Add Roles and Features Wizard	
Select installation	n type	DESTINATION SERVER VM-QuadWin12R2
Before You Begin Installation Type Server Selection Server Roles Features Confirmation Results	 Select the installation type. You can install roles and features on a running provide machine, or on an offline virtual hard disk (VHD). Role-based or feature-based installation Configure a single server by adding roles, role services, and features. Remote Desktop Services installation Install required role services for Virtual Desktop Infrastructure (VDI) to create or session-based desktop deployment. 	nysical computer or virtual
	< Previous Next >	Install Cancel

Figure 26

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- 4. Click the Select a server from the server pool option.
- 5. From the Server pool list, select the server where you want to install the Data Workbench application. Click Next button (see Figure 27).
- 6. The Data Workbench application does not require new Server Roles. Click Next.

L	Add Roles and Features Wizard
Select destinati	ON SETVER VM-QuadWin12R2
Before You Begin Installation Type Server Selection	 Select a server or a virtual hard disk on which to install roles and features. Select a server from the server pool Select a virtual hard disk
Server Roles Features Confirmation Results	Server Pool Filter: Name IP Address Operating System VM-QuadWin12R2 10.40.50.199 Microsoft Windows Server 2012 R2 Standard Image: Standard Server(s) found This page shows servers that are running Windows Server 2012, and that have been added by using the Add Servers command in Server Manager. Offline servers and newly-added servers from which data collection is still incomplete are not shown.
	< Previous Next > Install Cancel

Figure 27

L	Add Roles and Features Wizard	
Select server roles		DESTINATION SERVER VM-QuadWin12R2
Before You Begin	Select one or more roles to install on the selected server.	
Installation Type	Roles	Description
Server Selection		Active Directory Certificate Services
Server Roles	Active Directory Certificate Services	(AD CS) is used to create certification
Features	Active Directory Domain Services	authorities and related role services
Confirmation	Active Directory Federation Services	certificates used in a variety of
Results	Active Directory Rights Management Services	applications.
Results	Application Server	
	DHCP Server	E
	DNS Server	
	Fax Server	
	File and Storage Services (1 of 12 installed)	
	Hyper-V	
	Network Policy and Access Services	
	Print and Document Services	
	Remote Access	
	Remote Desktop Services	
		_
		ext > Install Cancel

- 7. From the features list, select the following options (see Figure 29).
- .NET Framework 3.5 Features
- .NET Framework 3.5 (includes .NET 2.0 and 3.0)
- .Net Framework 4.5 Features
- .NET Framework 4.5 (usually installed by default on Server).
- 8. Click **Next** button



9. Click Install button (see Figure 30).

L	Add Roles and Features Wizard	_ 🗆 X
Confirm installatio	on selections	DESTINATION SERVER VM-QuadWin12R2
Before You Begin	To install the following roles, role services, or features on selected server, click Ir	nstall.
Installation Type	Restart the destination server automatically if required	
Server Selection	Optional features (such as administration tools) might be displayed on this page	e because they have
Server Roles	their check boxes.	s, CIICK Previous to clear
Features		
Confirmation Results	.NET Framework 3.5 Features .NET Framework 3.5 (includes .NET 2.0 and 3.0)	
	Export configuration settings Specify an alternate source path	
	< Previous Next >	nstall Cancel

10. When the installation process is completed, click Close (see Figure 31).



SQL Server Installation

For Windows Server 2012, SQL Server 2014 must be installed manually.

NOTE: These steps can also be used if during the Quadrate Data WorkBench install, the SQL Server Installation fails.

If you wish to use your own version of SQL Server, please contact Quadrate support for instructions.

- 1. Download the SQL Server 2014 Express from the Microsoft website or contact support for a download link.
- 2. Once downloaded, click the installer executable.
- 3. On the initial page of the installer, select **New SQL Server stand-alone installation or add features to an existing installation** (see Figure 32).

1	SQL Server Installation Center	x
Planning Installation Maintenance Tools Resources Options	 New SQL Server stand-alone installation or add features to an existing installation Launch a wizard to install SQL Server 2014 in a non-clustered environment or to add features to an existing SQL Server 2014 instance. Upgrade from SQL Server 2005, SQL Server 2008, SQL Server 2008 R2 or SQL Server 2012 Launch a wizard to upgrade SQL Server 2005, SQL Server 2008, SQL Server 2008 R2 or SQL Server 2012 to SQL Server 2014. 	L
Microsoft SQL Server 2014		
Elauna 20		

4. Click the **I accept the license terms** check box. Then click **Next** button (see Figure 33).

1	SQL Server 2014 Setup	_ 🗆 X
License Terms To install SQL Server 2014, y	ou must accept the Microsoft Software License Terms.	
License Terms Global Rules Microsoft Update Product Updates Install Setup Files Install Rules Feature Selection Feature Rules Feature Configuration Rules Installation Progress Complete	MICROSOFT SOFTWARE LICENSE TERMS MICROSOFT SQL SERVER 2014 EXPRESS These license terms are an agreement between Microsoft Corporation (or based of live, one of its affiliates) and you. Please read them. They apply to the software not which includes the media on which you received it, if any. The terms also apply to • updates, • supplements, • Internet-based services, and • support services	on where you amed above, any Microsoft
	 I accept the license terms. Turn on Customer Experience Improvement Program ("CEIP") and Error Reporting to P quality, reliability and performance of Microsoft SQL Server 2014. See the Microsoft SQL Server 2014 Privacy Statement for more information. * Microsoft SQL Server 2014 also includes a Visual Studio component that will have CEIP off by default. If Visual Studio is installed, this component will use the CEIP settings for V 	Copy Print
	< Back Next >	Cancel

Figure 33

5. The Global Rules page identifies any issues that may occur during the install. If there are any failures, correct them before Setup can continue (see Figure 34).

1	SQL Server 2014 Setup	_ 🗆 X
Global Rules Setup Global Rules identify pro corrected before Setup can cor	oblems that might occur when you install SQL Server Setup support files. Failures must be ntinue.	
License Terms Global Rules Microsoft Update Product Updates Install Setup Files Install Rules Feature Selection Feature Rules Feature Configuration Rules Installation Progress Complete	Rule check in progress Show details >>	Re-run
	< Back Next >	Cancel

- 6. Click the Use Microsoft Update to check for updates (Recommended) check box.
- **NOTE**: This step is not technically required for use of the Data Workbench application but is recommended by Microsoft (see Figure 35).
 - 7. Click Next.

1	SQL Server 2014 Setup	
Microsoft Update Use Microsoft Update to chec License Terms Global Rules Microsoft Update Product Updates Install Setup Files Install Rules	SQL Server 2014 Setup :k for important updates Microsoft Update offers security and other important updates for Win- software, including SQL Server 2014. Updates are delivered using Auto the Microsoft Update website. Use Microsoft Update to check for updates (recommended) Microsoft Update FAQ	dows and other Microsoft omatic Updates, or you can visit
Install Rules Feature Selection Feature Rules Feature Configuration Rules Installation Progress Complete	Microsoft Update Privacy Statement	
	< <u>B</u> ack	Next > Cancel

8. If the option to check for updates was chosen, it will search for updates from Microsoft updates. Click **Next** when it is finished (see Figure 36).

1	SQL Server 201	14 Setup	_ 🗆 X
Install Setup Files	up is found and specified to be included,	the update will be installed.	
License Terms Global Rules Microsoft Update Product Updates Install Setup Files Install Rules Feature Selection Feature Rules Feature Configuration Rules Installation Progress Complete	Task Scan for product updates Download Setup files Extract Setup files Install Setup files	Status Completed Skipped Skipped Skipped	
		< Back Next	> Cancel

- 9. Choose **Database Engine Services** which is required by Data Workbench.
- **NOTE**: Other features are optional. It is recommended to leave the default directories but these can be changed if required.
 - 10. Click Next (see Figure 37).

1

SQL Server 2014 Setup

_ 🗆

X

Feature Selection

Select the Express features to install.

License Terms	Eeatures:		Feature descrip	ption:	
Global Rules Microsoft Update Product Updates Install Setup Files Install Rules Feature Selection Feature Rules Instance Configuration Server Configuration Database Engine Configuration Feature Configuration Rules Installation Progress Complete	Instance Features Database Engine Services SQL Server Replication Shared Features SQL Client Connectivity SDK Redistributable Features		The configuration and operation of each instance feature of a SQL Server instance is isolated from other SQL Server instances. SQL Server instances can operate side-by-side on the same computer. Prerequisites for selected features: Already installed: Windows PowerShell 2.0 Microsoft .NET Framework 3.5 Microsoft .NET Framework 4.0 Image: Space Requirements		
	Select <u>All</u> Unselect All Instance <u>r</u> oot directory: Shared feature directory: Shared feature directory (<u>x</u> 86):	C:\Program Files (x8 C:\Program Files\M C:\Program Files (x8	36)\Microsoft SQL licrosoft SQL Serve 36)\Microsoft SQL	. Server\ er\ . Server\	
		< <u>B</u> ack	<u>N</u> ext >	Cancel	Help

Figure 37

- 11. Click the **Named Instance** option and enter **QUADRATE** into the text box for Named Instance **and** Instance ID (see Figure 38) and click **Next** button.
- **NOTE: Both the named instance and the instance ID must be QUADRATE**. If the installation environment or process does not allow this, please contact support for instruction on how to do a custom SQL Installation.

1		SQL Server 201	4 Setup		_ _ ×
Instance Configuratio	n e ID for the instance of S0	QL Server, Instance	ID becomes part of t	the installation path.	
License Terms Global Rules Microsoft Update	 Default instance Named instance: 	QUADRATE			
Product Updates Install Setup Files Install Rules	Instance ID:	QUADRATE			
Feature Selection Feature Rules Instance Configuration Server Configuration Database Engine Configuration Feature Configuration Rules Installation Progress Complete	SQL Server directory: Installed instances:	C:\Program Files	(x86)\Microsoft SQL	Server\MSS <mark>QL12.QUAI</mark>	DRATE
	Instance Name	Instance ID	Features	Edition	Version
			< Back	Next > Car	ncel Help

12. Click **Next** (see Figure 39).

1	SQL Server a	2014 Setup		_ □	x
Server Configuration					
Specify the service accounts and	l collation configuration.				
License Terms Global Rules	Service Accounts Collation				
Microsoft Update Product Updates	Microsoft recommends that you Service	use a separate account for each Account Name	SQL Server serv Password	ice. Startup Type	
Install Setup Files Install Rules	SQL Server Database Engine SQL Server Browser	NT Service\MSSQL\$QUA NT AUTHORITY\LOCAL		Automatic Disabled	~
Feature Selection Feature Rules					
Instance Configuration Server Configuration					
Database Engine Configuration Feature Configuration Rules					
Installation Progress Complete					
		< <u>B</u> ack <u>N</u> ext	> Car	ncel He	lp

Figure 39

13. On the Server Configuration tab, click the **Mixed Mode (SQL Server authentication and Windows authentication)** option and create a strong password for the SQL Server Administrator (sa) account (see Figure 40). Then click **Next**.

NOTE: Be sure to note the sa password. If forgotten, it is not easily recreated.

NOTE: Consult with your Windows System Administrator to determine the rules for a strong password if needed.

1	SQL Server 2014 Setup	_ 🗆 X
Database Engine Confi Specify Database Engine authe	iguration Intication security mode, administrators and data directories.	
License Terms Global Rules Microsoft Update Product Updates Install Setup Files Install Rules Feature Selection Feature Rules Instance Configuration Server Configuration Database Engine Configuration Feature Configuration Rules Installation Progress Complete	Server Configuration Data Directories User Instances Specify the authentication mode and administrators for the Database Engine. Authentication Mode Windows authentication mode Mixed Mode (SQL Server authentication and Windows authentication) Specify the password for the SQL Server system administrator (sa) account. Enter password: Confirm password: Specify SQL Server administrators Specify SQL Server administrators VM-QUADWIN12R2\Administrator (Administrator) SQL Server to the server administrator (Administrator) Add Current User Add	Server administrators unrestricted access e Database Engine.
	< Back Next > Cano	cel Help

Figure 40

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1	SQL Server 2014 Setup	_ 🗆 X
Installation Progress		
License Terms Global Rules Microsoft Update Product Updates Install Setup Files Install Rules Feature Selection Feature Rules Instance Configuration Server Configuration Database Engine Configuration Feature Configuration Rules Installation Progress Complete	Install_VC10Redist_Cpu64_Action	
	Next > Cancel	Help

Figure 41

15. Finally, ensure all the tasks have succeeded. Follow any recommendations for next steps if there are any failures. Then click Close (see Figure 42).

1	SQL Server 2014 S	etup 📃 🗖	X
Complete Your SQL Server 2014 installat	ion completed successfully with product update	15.	
License Terms	Information about the Setup operation or pr	ossible next steps:	
Global Rules	Feature	Status	
Microsoft Update	Database Engine Services	Succeeded	
Product Updates	SQL Server Replication	Succeeded	
Install Setup Files	SQL Browser	Succeeded	
Install Rules	SQL Writer	Succeeded	
Feature Selection	SQL Client Connectivity	Succeeded	
Easture Puller	SQL Client Connectivity SDK	Succeeded	
	Setup Support Files	Succeeded	
Instance Configuration			
Server Configuration			
Database Engine Configuration	Details		
Feature Configuration Rules			
Installation Progress	Viewing Product Documentation for	SQL Server	^
Complete	Only the components that you use to vi	we and manage the decumentation for SOL Server hour	=
complete	been installed. By default, the Help View SQL Server, you can use the Help Libra your local computer. For more informatic (< <u>http://go.microsoft.com/fwlink/?LinkID</u> Microsoft Update	ver component uses the online library. After installing ry Manager component to download documentation to on, see Use Microsoft Books Online for SQL Server =299578>).	
			V
	Summary log file has been saved to the following location:		
	QuadWin12R2 20160901 060712.txt	, ,,, _,	
		Close Help	

Enable TCP/IP for SQL Server

TCP/IP will need to be enabled for the SQL Server.

- 1. Run the SQL Server 2014 Manager.
- 2. Click SQL Server Network Configuration (32Bit) (see Figure 43).



3. Expand the **SQL Server Network Configuration (32bit)** (see Figure 44).

🚡 Sql Server Configuration Manager 📃 🗖 🗖					x
File Action View Help					
 SQL Server Configuration Manager (Local) SQL Server Services J. SQL Server Network Configuration (32bit) Protocols for QUADRATE SQL Native Client 11.0 Configuration (32bit) 	Protocol Name Shared Memory Topy TCP/IP	Status Enabled Disabled Disabled			

Figure 44

4. Right-click **TCP/IP** in the right pane and select **Enable** on the drop down menu (see Figure 45).



5. A Warning box displays; click **OK** (see Figure 46).



NOTE: TCP/IP is now enabled (see Figure 47).



Figure 47

6. To restart the SQL Server services, click **SQL Server Services** (see Figure 48)

	Sql Server Configuration Manager			D X
File Action View Help				
🗢 🔿 🙍 💀 🛛				
 SQL Server Configuration Manager (Local) SQL Server Services SQL Server Network Configuration (32bit) Protocols for QUADRATE SQL Native Client 11.0 Configuration (32bit) 	Name SQL Server Browser SQL Server (QUADRATE) SQL Server Agent (QUADRATE)	State Stopped Running Stopped	Start Mode Other (Boot, Syste Automatic Other (Boot, Syste	Log On As NT AUTHOF NT Service\P NT AUTHOF

Figure 48

7. Right-click SQL Server (QUADRATE) in the right pane (see Figure 49).



8. Click **Restart** on the drop down.

Start SQL Server Browser Service

1. Click in the **Start Search** box, type **services.msc**, and then press the **Enter** key (see Figure 50).



Figure 50

2. Right-click the SQL Server Browser service and choose Properties (See Figure 51).

Q		Services					_ □	x
File Action View	Help							
♦ ➡	à 🗟 🛛 🖬 🕨 🔳 🕪 🕨							
🎑 Services (Local)	Services (Local)							
	SOL Server Browser	Name	Description	Status	Startup Type	Log On As		~
	SQL SCIVEI BIOMSCI	Remote Desktop Services	Allows user	Running	Manual	Network S		
	Stop the service	🤹 Remote Desktop Services U	Allows the r	Running	Manual	Local Syste		
	Pause the service	🔍 Remote Procedure Call (RPC) The RPCSS	Running	Automatic	Network S		
	Restart the service	🔍 Remote Procedure Call (RP	In Windows	-	Manual	Network S		
		Remote Registry	Enables rem		Automatic (T	Local Service		
	Description:	Resultant Set of Policy Provi.	Provides a n		Manual	Local Syste		
	Provides SQL Server connection	Routing and Remote Access	Offers routi		Disabled	Local Syste		
	information to client computers.	🤹 RPC Endpoint Mapper	Resolves RP	Running	Automatic	Network S		
		🔍 Secondary Logon	Enables star		Manual	Local Syste		
		🔍 Secure Socket Tunneling Pr	. Provides su		Manual	Local Service		
		🔍 Security Accounts Manager	The startup	Running	Automatic	Local Syste		
		i Server	Supports fil	Running	Automatic	Local Syste		
		🔍 Shell Hardware Detection	Provides no	Running	Automatic	Local Syste		
		🔍 Smart Card	Manages ac		Disabled	Local Service		
		鵒 Smart Card Device Enumera.	Creates soft	Running	Manual (Trig	Local Syste		
		🔍 Smart Card Removal Policy	Allows the s		Manual	Local Syste		
		🔍 SNMP Trap	Receives tra		Manual	Local Service		
		🔍 Software Protection	Enables the		Automatic (D	Network S		
		🔍 Special Administration Con	. Allows adm		Manual	Local Syste		
		🔍 Spot Verifier	Verifies pot		Manual (Trig	Local Syste		
		🔍 SQL Server (QUADRATE)	Provides sto	Running	Automatic	NT Service		≡
		🔍 SQL Server Agent (QUADRA	Executes jo		Disabled	Network S		
		SQL Server Browner	<u> </u>	Running	Disabled	Local Service		
		SQL Server VS Start	h	Running	Automatic	Local Syste		
		Stop Stop	h		Disabled	Local Service		
		🔍 Storage Tiers 🔋 🛛 Pause	t		Manual	Local Syste		
		Superfetch Resume	a		Manual	Local Syste		
		System Event Restart	y	Running	Automatic	Local Syste		
		System Event:	es	Running	Automatic (T	Local Syste		
		Task Schedule All Task:	s t 15	Running	Automatic	Local Syste		
		😪 TCP/IP NetBl 🛛 🛛 Refresh	4	Running	Automatic (T	Local Service		
	Landed (Deadard)	Carlenhony Propert	ies el		Manual	Network S		<u> </u>
	Lextended / Standard /							
		Help						

3. Change **Startup Type** from **Disabled** to **Automatic and** click **Apply** button then **OK** button (see Figure 52).



- 4. Close the Windows Services screen.
- 5. Run the SQL Server 2014 Manager (see figure 53).

File Action View Help Image: Second Sec	State Running Stopped er Stopped	Start Mode Automatic Other (Boot, Syste Automatic	Log On As NT Service\MSSQL NT AUTHORITY\NE	Process ID 1292
◆ ◆ ▲ ▲ Image: Sol Server Configuration Manager (Local) Image: Sol Server Configuration (32bit) Image: Sol Server QUAA Image: Sol Server Network Configuration (32bit) Image: Sol Server Agent Image: Sol Server Brows: Image: Sol Server Client 11.0 Configuration (32bit) Image: Sol Server Brows: Image: Sol Server Brows:	State Running Stopped er Stopped	Start Mode Automatic Other (Boot, Syste Automatic	Log On As NT Service\MSSQL NT AUTHORITY\NE	Process ID 1292
SQL Server Configuration Manager (Local) SQL Server Services SQL Server Network Configuration (32bit) Name SQL Server (QUA SQL Server Address SQL Server Address SQL Server Address SQL Server Address SQL Server Brow: SQL Serve	State Running Stopped er Stopped	Start Mode Automatic Other (Boot, Syste Automatic	Log On As NT Service\MSSQL NT AUTHORITY\NE	Process ID 1292
			NT AUTHORITY(LO	0
<		Ш		>

6. Click **SQL Server Services** in the left pane and right-click the **SQL Server Browser** in the right pane and click **Start** (see Figure 54).

a	Sql Server Confi	guration Manager			_ D X
File Action View Help					
◆ ⇒ 2 🗟 ≽ 2 0 0 0 0					
🕵 SQL Server Configuration Manager (Local)	Name	State	Start Mode	Log On As	Process ID
SQL Server Services	SQL Server (QUA	Running	Automatic	NT Service\MSSQL	1292
▶ <u>↓</u> SQL Server Network Configuration (32bit)	🚡 SQL Server Agent	Stopped	Other (Boot, Syste	NT AUTHORITY\NE	0
▷ , ♣, SQL Native Client 11.0 Configuration (32bit)	📠 SQL Server Browser	Stannad	Automatic	NT AUTHORITY\LO	0
		Start			
		Stop			
		Pause			
		Resume			
		Restart			
		Properties			
		Help			
	<				>
Start selected service.					

NOTE: A window stating that the service is starting displays and closes.

7. Close the SQL Server Configuration Manager.

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.

Command Line Parameter	Description
/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 <i>This will install Do you wish to continue?</i> 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 display and the startup prompt is visible (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 <i>Reboot now?</i> 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. • Cancel in Retry/Cancel situations. • Yes (=continue) in a DiskSpaceWarning/DirExists/DirDoesntExist/NoUninstallWarning/ExitSetupMessage/ConfirmUni nstall situation. • Yes (=restart) in a FinishedRestartMessage/UninstalledAndNeedsRestart situation. 5 message boxes are not suppressible: • The About Setup message box. • The FileNotInDir2 message box. • The FileNotInDir2 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. NOTE: Use quotes if the filename contains spaces.		

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/SAVEINF="filename"	Instructs Setup to save installation settings to the specified file. NOTE: Use quotes if the filename contains spaces.
/LANG= <i>language</i>	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.

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:

- 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 the View Trace Files button.

NOTE: The drop down list labeled **Trace Files** allows you to select any of the trace files that have been generated. The text box labeled **Trace File Location** shows the path where the trace file is located.

3. 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

Last Updated: March 16, 2017