Syniti

Syniti Data Workbench

Manual Install Guide

Version 10.0

Software Release Date: 10/9/20

Syniti

https://support.quadrate.com

Syniti Data Workbench

Document History

Version	Author	Date	Reviewer	Date	Comments
1	J. Lorenzin	10/7/20	PConrad	10/2/20	New install guide for setup.exe only

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Overview

This document provides instructions only for installations using the Syniti DataWorkbenchSetup.exe available for download in **SynitiDataWorkbench_10.0.x_Manual_Install.zip**. When installing using the **DataWorkbenchSetup.exe**, you will probably need to manually configure Data Workbench and/or SQL Server.

Most users should instead choose one of the following installation options.

- For new users, read the *Syniti Data Workbench Install Guide* available in the **SynitiDataWorkbench_10.0.x_Automatic_Install_Upgrade.zip** download package or in the Help Center. This guide describes how to install using the self-extracting setup which takes care of configuring both Data Workbench and SQL Server.

- For existing users wishing to upgrade, read the *Syniti Data Workbench Upgrade Guide* available in the **SynitiDataWorkbench_10.0.x_Automatic_Install_Upgrade.zip** download package or in the Help Center. This guide describes how to upgrade using the self-extracting setup which takes care of configuring both Data Workbench and SQL Server.

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

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.
- Microsoft SQL Server Express or Microsoft SQL Server 2014 or later with Windows Authentication enabled. (SQL Server Express 2017 will be installed on 64-bit systems and SQL Server Express 2014 will be installed on 32-bit systems, unless a different version is indicated.)
- .NET Framework 4.5 or later

.NET Framework Versions

Data Workbench requires .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), the DataWorkbenchSetup.exe will install .NET Framework 4.5.

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SQL Server Versions

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

The installation process:

- Requires that Windows Authentication is enabled in SQL Server
- Creates a QAS database in the designated SQL Server instance, with a default user **qasUser** and password **Qu@dr8q@s.**
- Creates a SQL Server **sa** user with the password **$D@t@W0rkb3nch.**

SAP Authorization Requirements

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

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

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

Authorization object:	S_ADMI_FCD
Value:	MEMO

Authorization object:	S_GUI
Activity:	61

Syniti Data Workbench Download/Query Feature Requirements

The Data Workbench download feature allows you to create 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

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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.

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.
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

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	Professional 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 <u>User Details tab</u> of <u>Manage User/Group Page.</u>

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	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.
	An enterprise installation is best suited for multiple users within an organization and provides the following features:
	Centralized security
	Easy sharing of templates and upload mappings

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Enterprise Client	Installs the client application on each of the user's machine. This installation option requires the name of the server where the Enterprise Server Installation was performed. (Only install this if the Enterprise Server was installed).
Custom	Installs selected components according to need. This installation option also allows you to set port numbers for the different Data Workbench components.

Data Workbench Architecture

Data Workbench consists of 3 main components:

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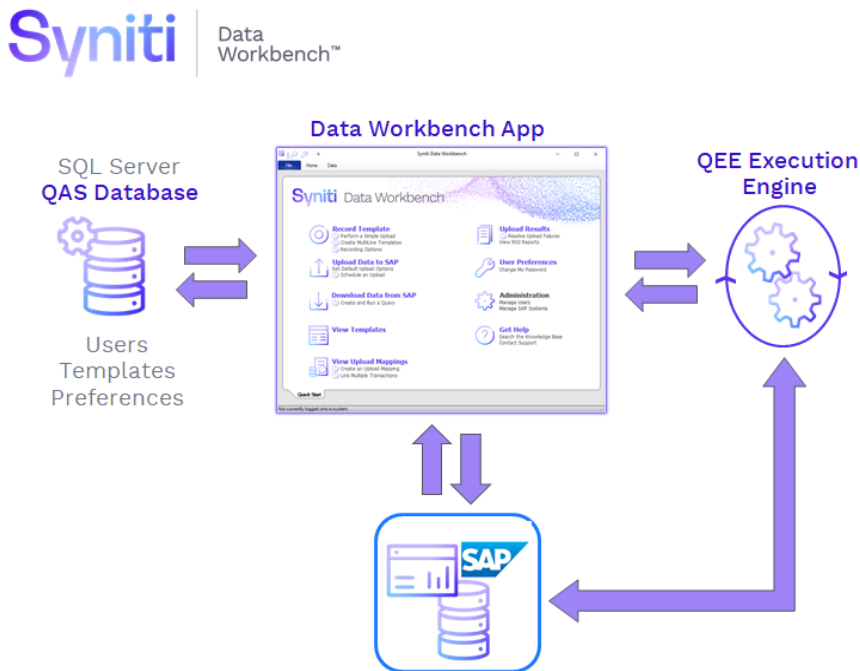
Download Data Workbench

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.

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

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

Installation Options

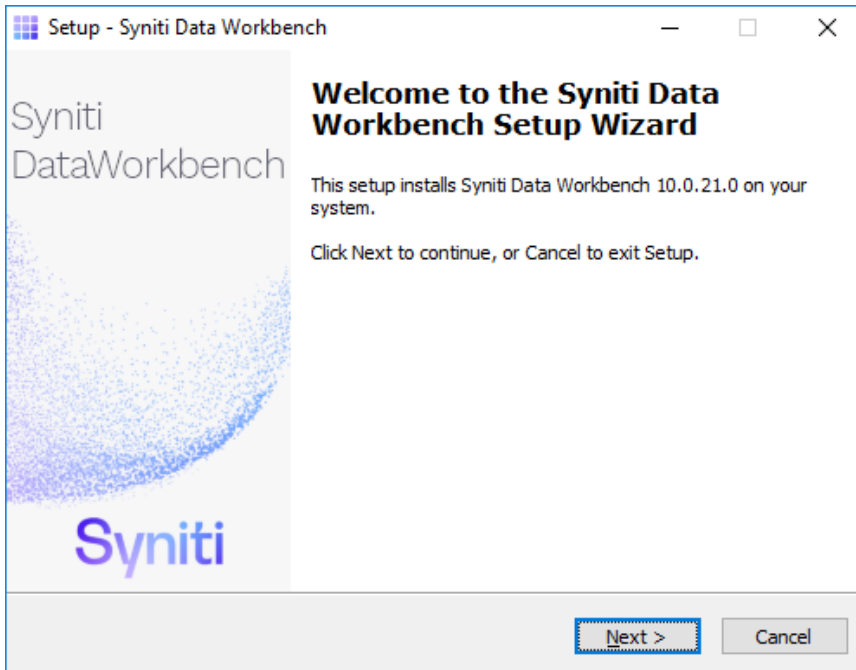Select one of the following sections in the guide to upgrade from your current Data Workbench version to Data Workbench 10.

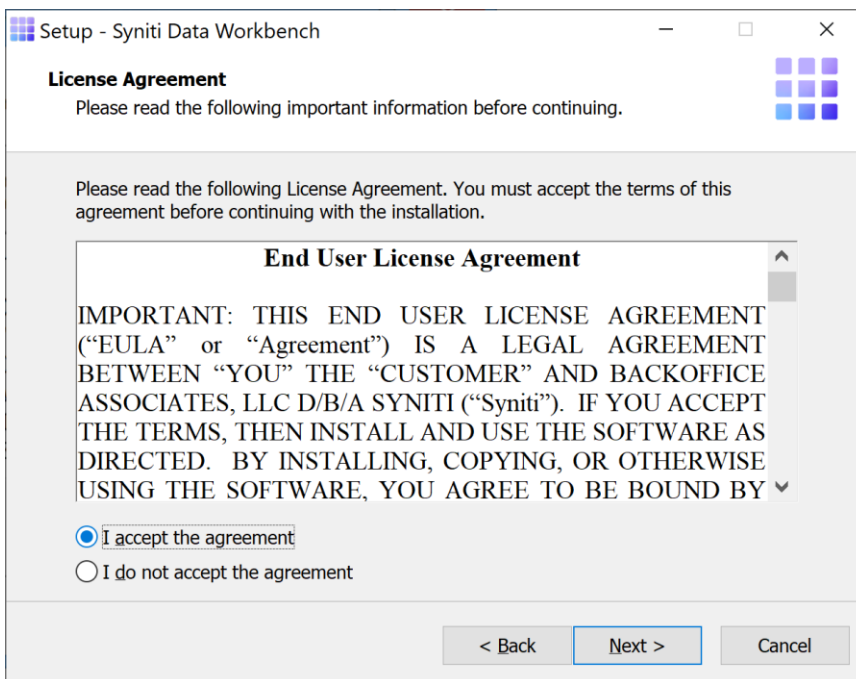| Install Data Workbench Standalone	For Standalone installations where the SQL Server QAS database is installed on the same system as Data Workbench. Also installs SQL Server.
Install Data Workbench Enterprise Server	For Enterprise Server installations where the SQL Server QAS database is installed on the same system as Data Workbench. Also installs SQL Server.
Install Data Workbench Enterprise Client	For Enterprise Client installations.
Install Data Workbench with Existing SQL Server	For Enterprise Server installations where there is an existing SQL Server installation to be used for the Data Workbench QAS database. These instructions assume that you want to keep your current version of SQL Server. After making sure that your SQL Server is set up correctly, follow steps for Install Data Workbench Standalone or Install Data Workbench Enterprise Server.
Install Data Workbench and a custom SQL Server	For Enterprise Server installations where you would like to use a different version of SQL Server from the default provided with the Data Workbench installation package. After making sure that your SQL Server is set up correctly, follow steps for Install Data Workbench Standalone or Install Data Workbench Enterprise Server

Install Data Workbench Standalone

This section also includes SQL Server installation during setup.

1. Double-click on the DataWorkbenchSetup.exe file.
   The Syniti Data Workbench Setup launches automatically.

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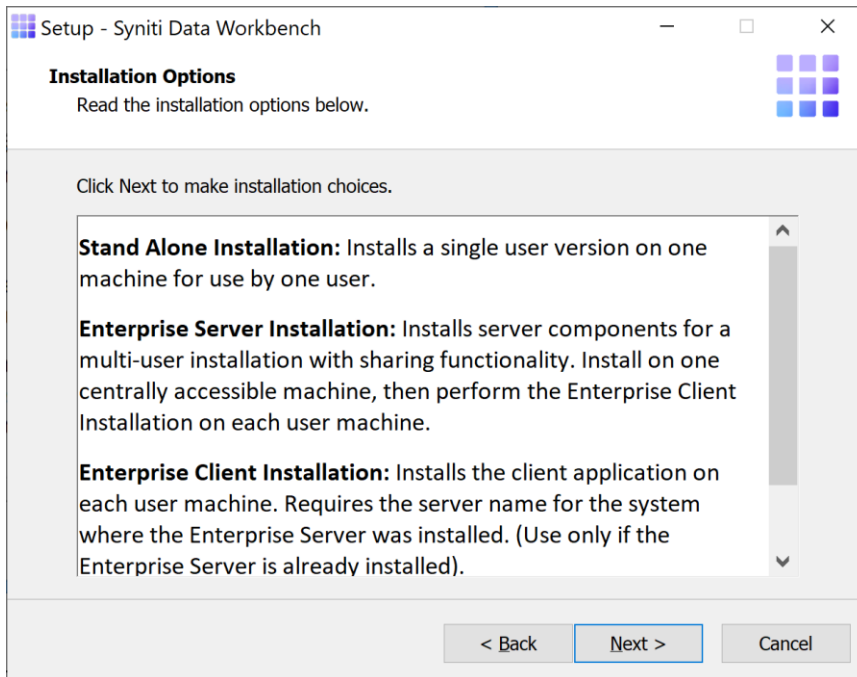2. Click **Next** to display the license agreement.

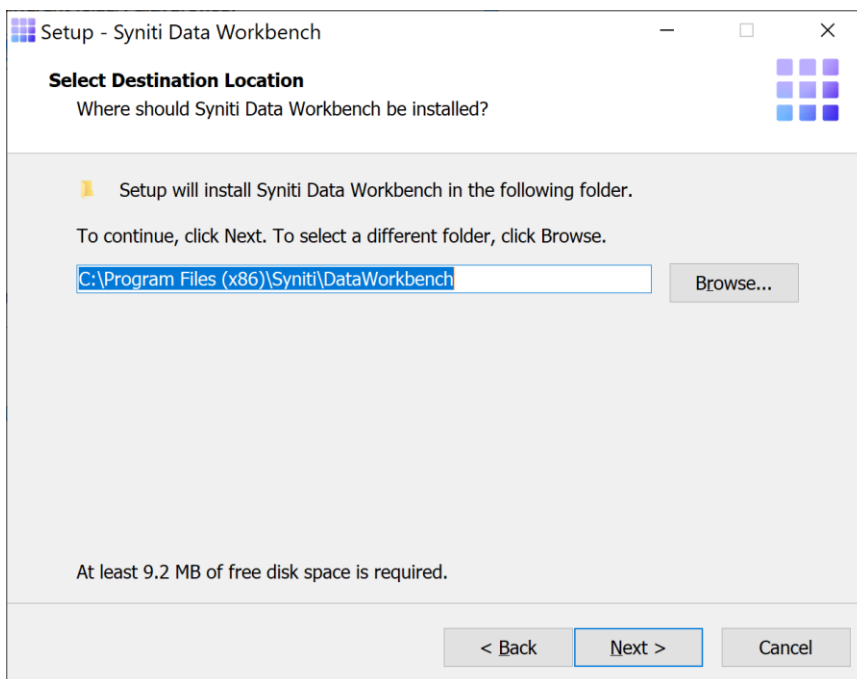3. Review the agreement and click **I accept the agreement**.

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

5. Review the installation options.

Setup - Syniti Data Workbench

Installation Options
Read the installation options below.

Click Next to make installation choices.

Stand Alone Installation: Installs a single user version on one machine for use by one user.

Enterprise Server Installation: Installs server components for a multi-user installation with sharing functionality. Install on one centrally accessible machine, then perform the Enterprise Client Installation on each user machine.

Enterprise Client Installation: Installs the client application on each user machine. Requires the server name for the system where the Enterprise Server was installed. (Use only if the Enterprise Server is already installed).

< Back   Next >   Cancel

6. Click **Next** to continue.

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

Setup - Syniti Data Workbench

Select Destination Location
Where should Syniti Data Workbench be installed?

Setup will install Syniti Data Workbench in the following folder.

To continue, click Next. To select a different folder, click Browse.

C:\Program Files (x86)\Syniti\DataWorkbench   Browse...

At least 9.2 MB of free disk space is required.

< Back   Next >   Cancel

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8. Click **Next** to continue. On the *Select Components* page, choose **Stand Alone Installation.**
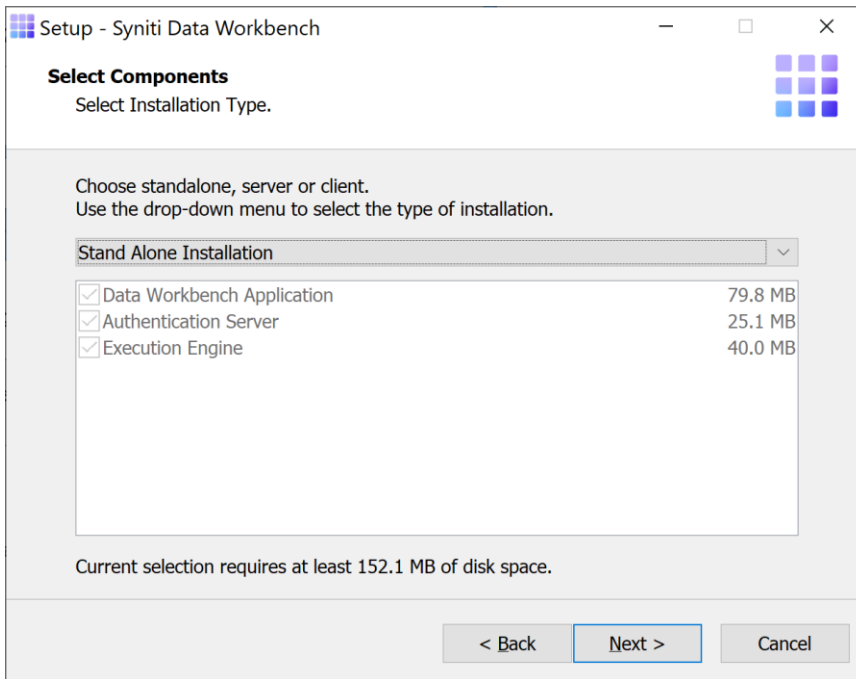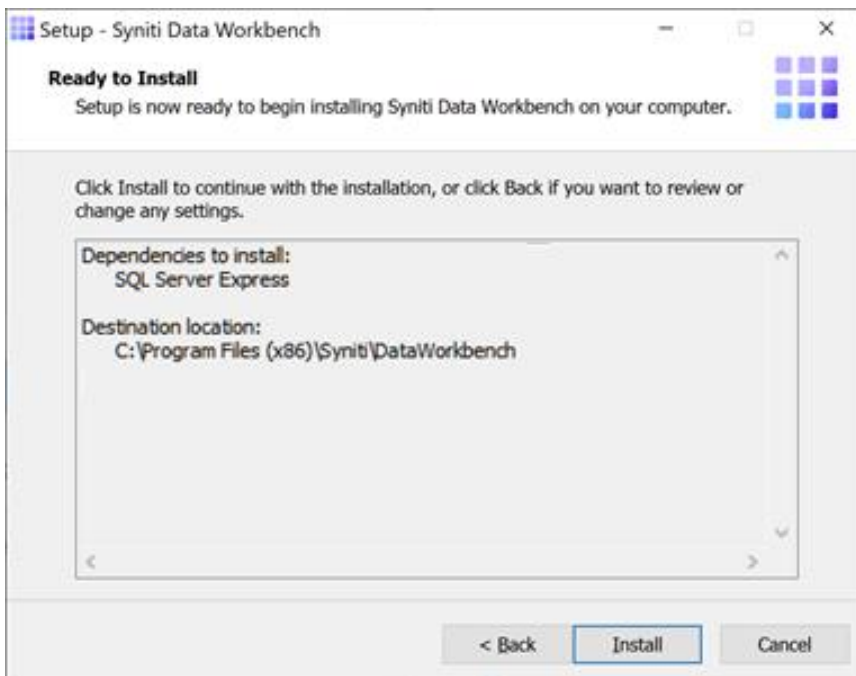
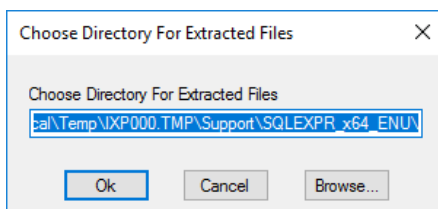9. Click **Next**.

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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.
SQL Server Express 2017 (SQL Server Express 2017 will be installed on 64-bit systems and SQL Server Express 2014 will be installed on 32-bit systems.)	SQL Server Express is a Microsoft database engine used for storage of templates, upload mappings, logs and other system information. Installed for Standalone and Enterprise Server versions. Note that the SQL Server setup file is large (at least 168MB) and the Data Workbench setup downloads the required file using ftp. Be sure that you have an adequate internet connection to download a file of this size, and avoid a timeout during the process. The installation of SQL Server typically takes at least 20 minutes.

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

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

12. If SQL Server is required, select a temporary folder for the SQL Server downloaded files or click **OK** to accept the default folder.

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

> **NOTE**: If an error occurs during the SQL Server Express installation, cancel the Data WorkBench setup. If the error is due to an internet issue, try the installation again when you have access to a fast, reliable internet connection. Contact the Data Workbench support team via the Help Center for further assistance.

13. Click **Finish** to complete the setup.
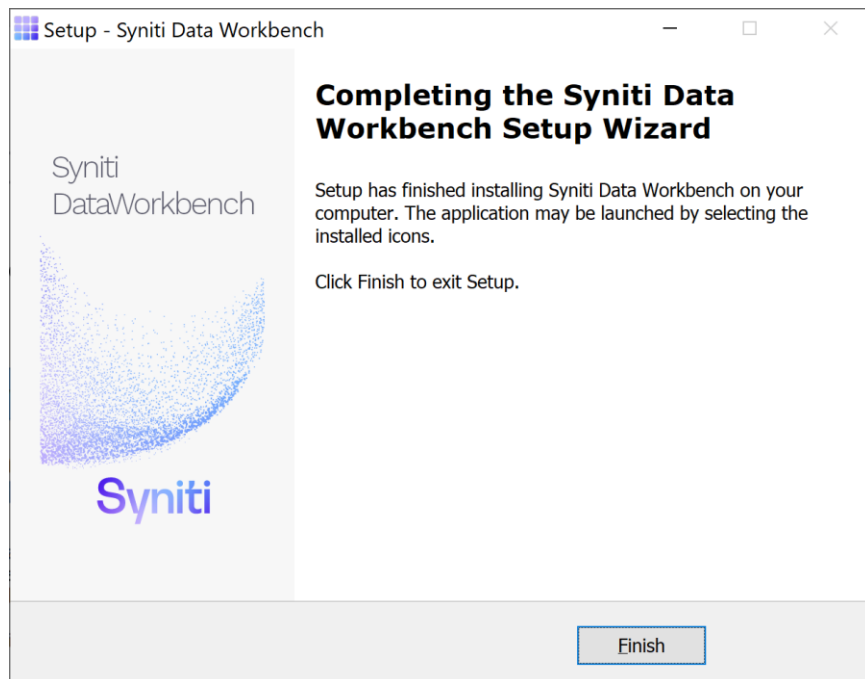
14. The next step is to Activate Data Workbench.

Install Data Workbench Enterprise Server

This section assumes that you will install SQL Server during setup. This is often the case for new installations, but if you have an existing SQL Server that you want to use, go to the section Use a Different Microsoft SQL Server Version.

1. Double-click on the DataWorkbenchSetup.exe file.
   The Syniti Data Workbench Setup launches automatically.

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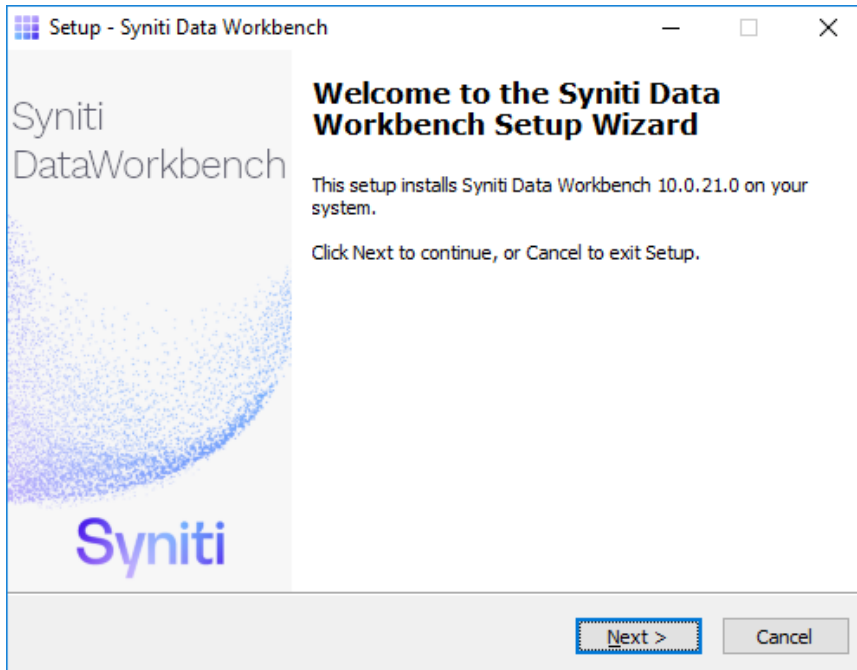
15. Click **Next** to display the license agreement.

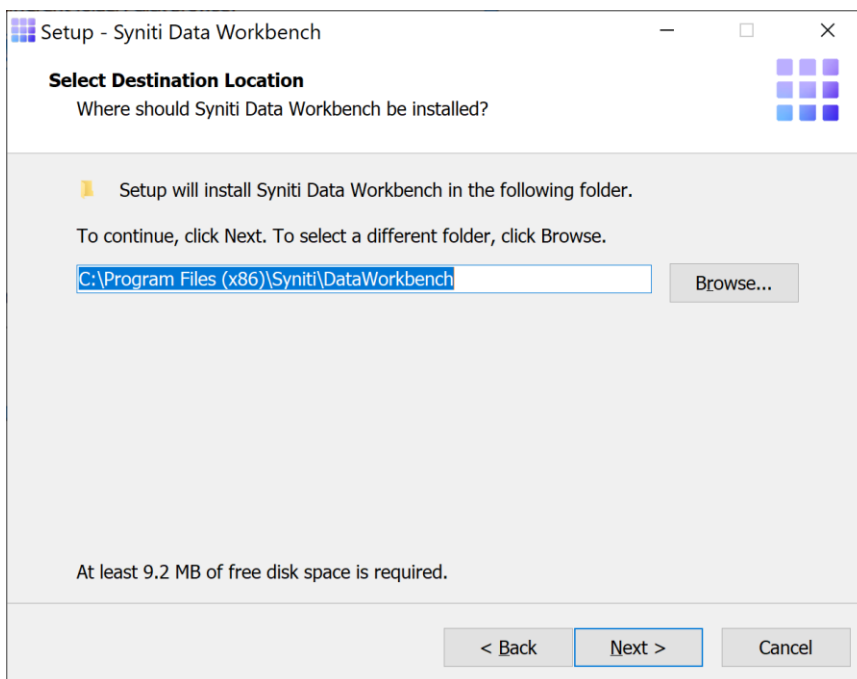16. Review the agreement and click **I accept the agreement**.

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

18. Review the installation options.

19. Click **Next** to continue.

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

21. Click **Next** to continue.

22. 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
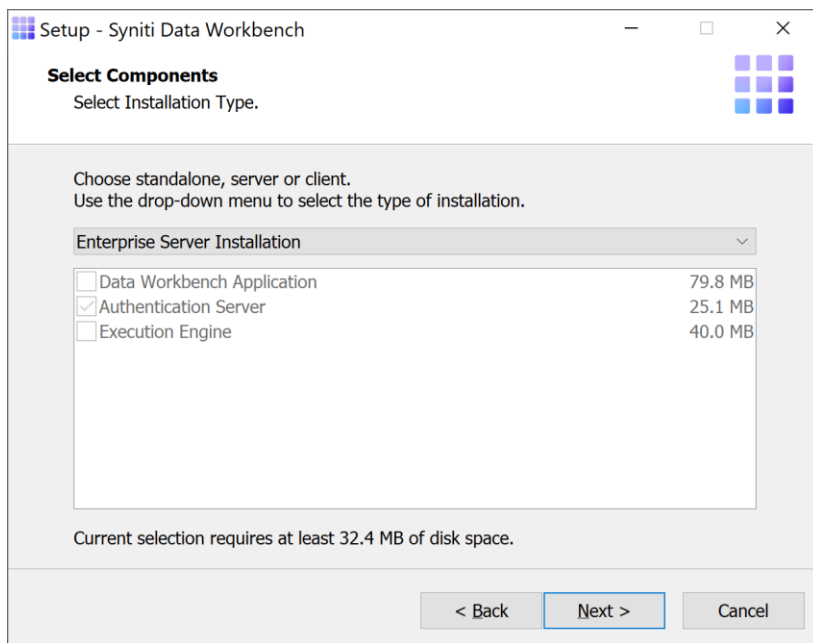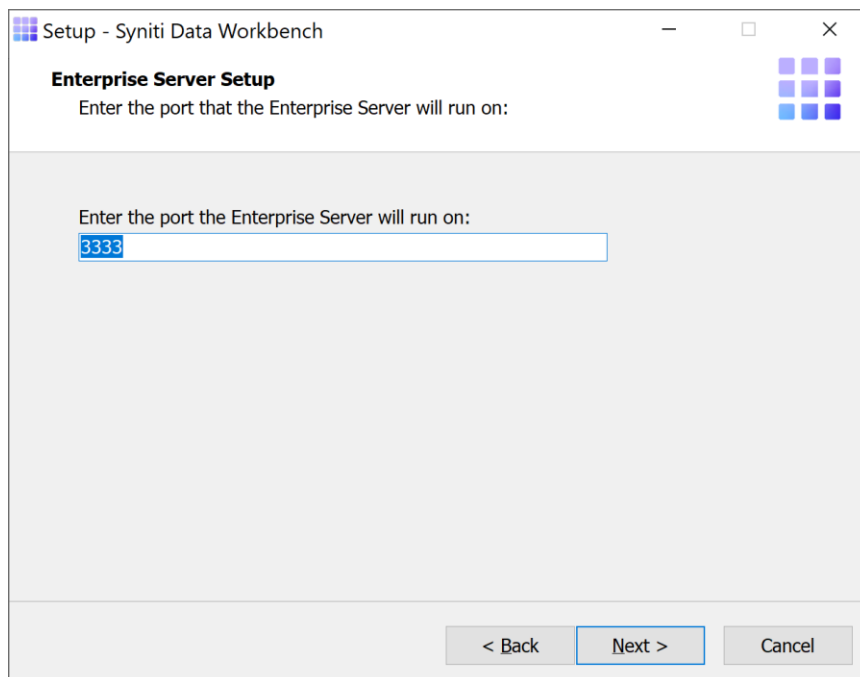

- Or, **Custom Installation** if you are planning to run the Data Workbench GUI and uploads/downloads on the server.

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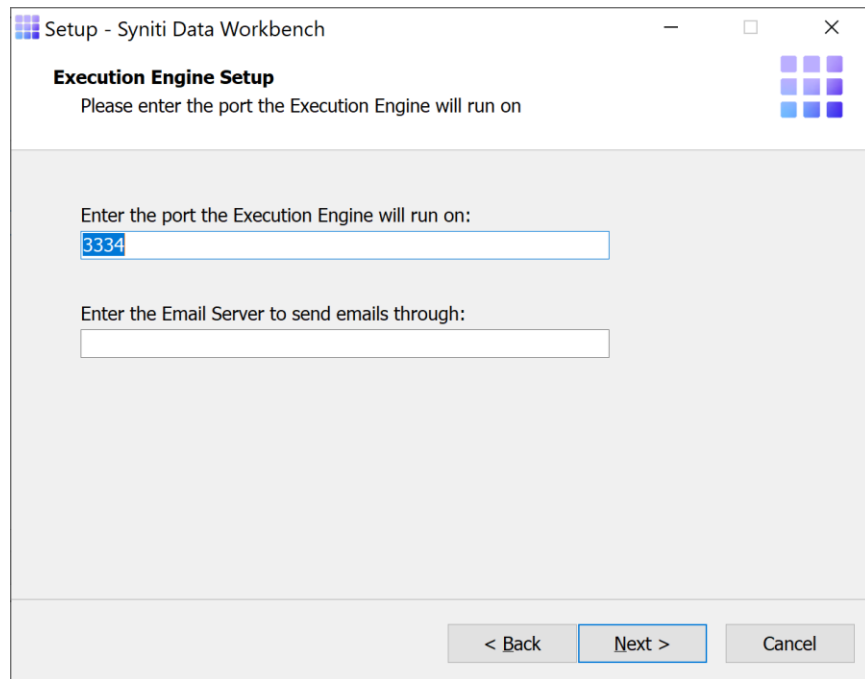o Click to check all three components for installation.

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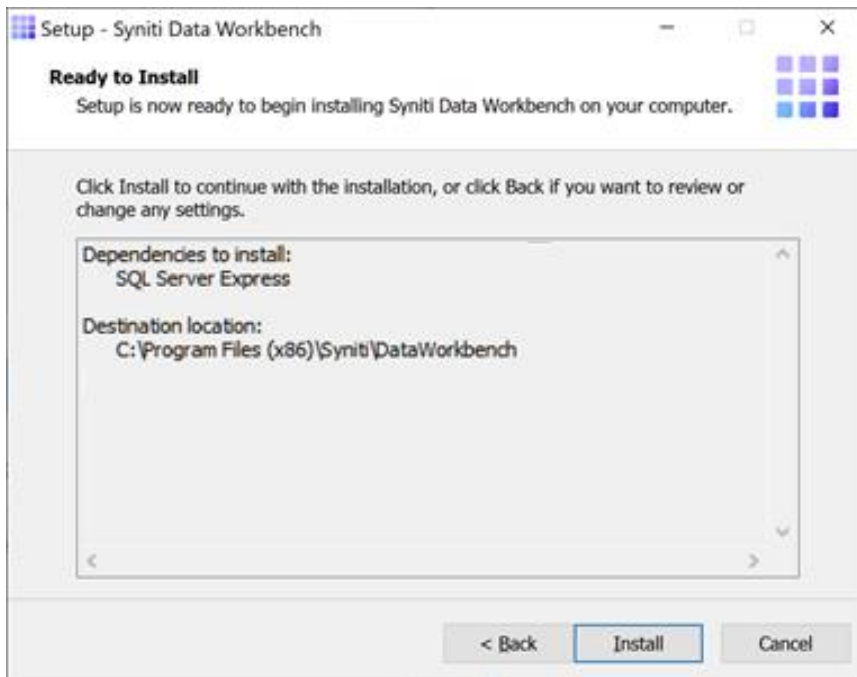

o (Optional) Set a server name or IP address for the Email Server field. It is used when scheduling uploads to receive status emails. The value can also be set in the User Preferences Services tab after installation.

23. Click **Next**.


The Ready to Install page displays the required components that will also be installed. The components that may be installed are:
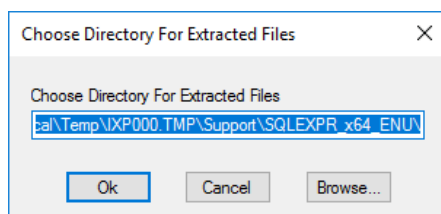
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.NET Frameworks 4.5	Installed if your system is running a version of .NET Framework earlier than 4.5.
SQL Server Express 2017 (SQL Server Express 2017 will be installed on 64-bit systems and SQL Server Express 2014 will be installed on 32-bit systems.)	SQL Server Express is a Microsoft database engine used for storage of templates, upload mappings, logs and other system information. Installed for Standalone and Enterprise Server versions. Note that the SQL Server setup file is large (at least 168MB) and the Data Workbench setup downloads the required file using ftp. Be sure that you have an adequate internet connection to download a file of this size, and avoid a timeout during the process. The installation of SQL Server typically takes at least 20 minutes.

24. Click **Install**; to install required components and the Data Workbench application. Dependencies are downloaded.
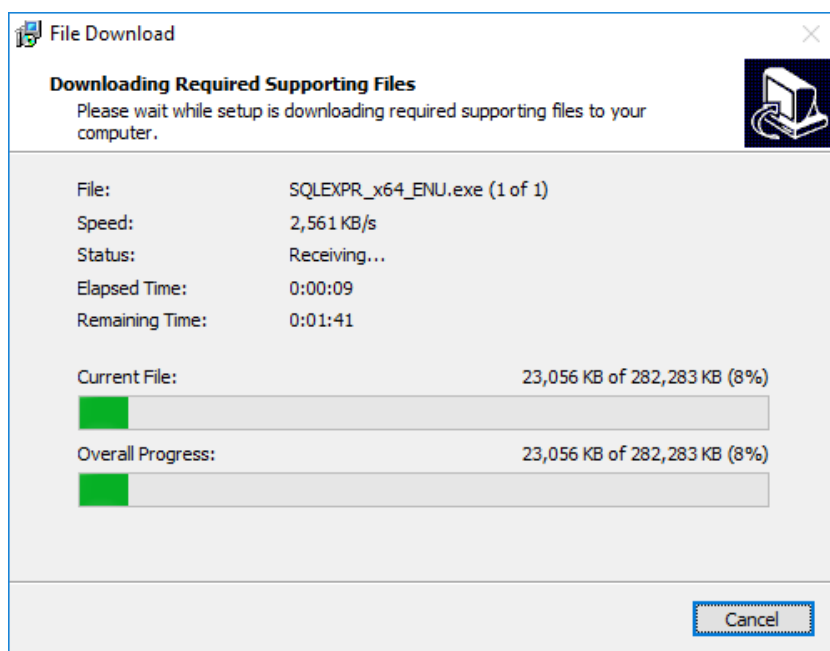
25. If .NET Framework is required, you may be asked to confirm download and installation. Do not skip this step.

26. If SQL Server is required, select a temporary folder for the SQL Server downloaded files or click **OK** to accept the default folder.


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

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NOTE: If an error occurs during the SQL Server Express installation, cancel the Data WorkBench setup. If the error is due to an internet issue, try the installation again when you have access to a fast, reliable internet connection. Contact the Data Workbench support team via the Help Center for further assistance.

27. Click **Finish** to complete the setup.
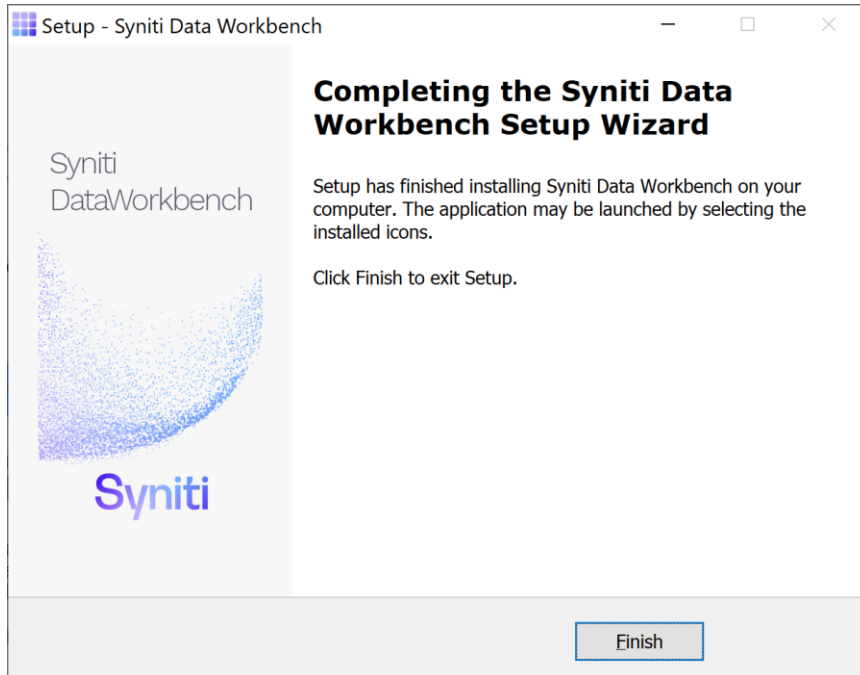
28. On the system running SQL Server, check that the SQL Server Browser service is running.

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

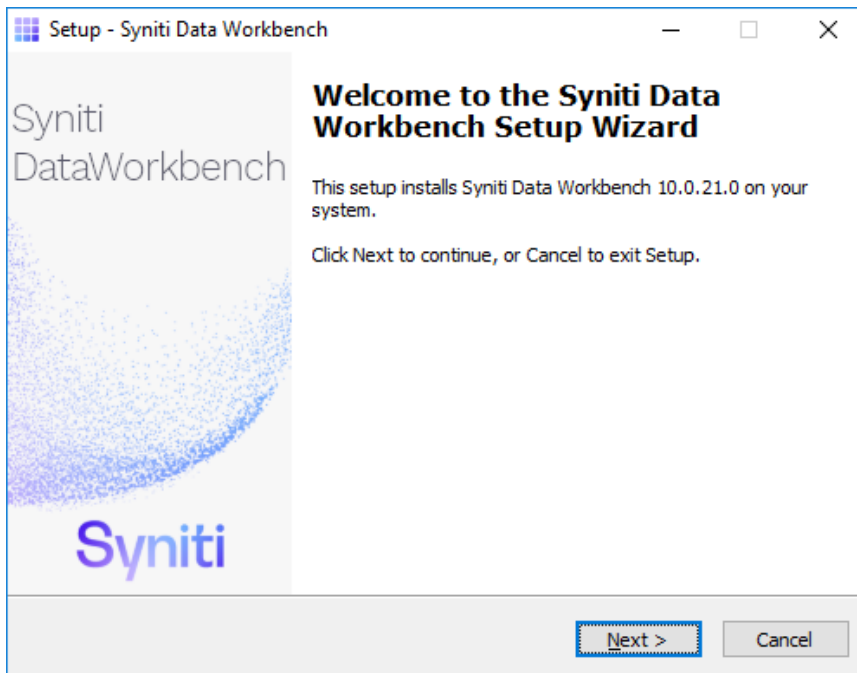30. The next step is to Activate Data Workbench.

Install Data Workbench Enterprise Client

Use the DataWorkbenchSetup.exe interactively or from the command line. You can also 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 a Client Install Package for more information.
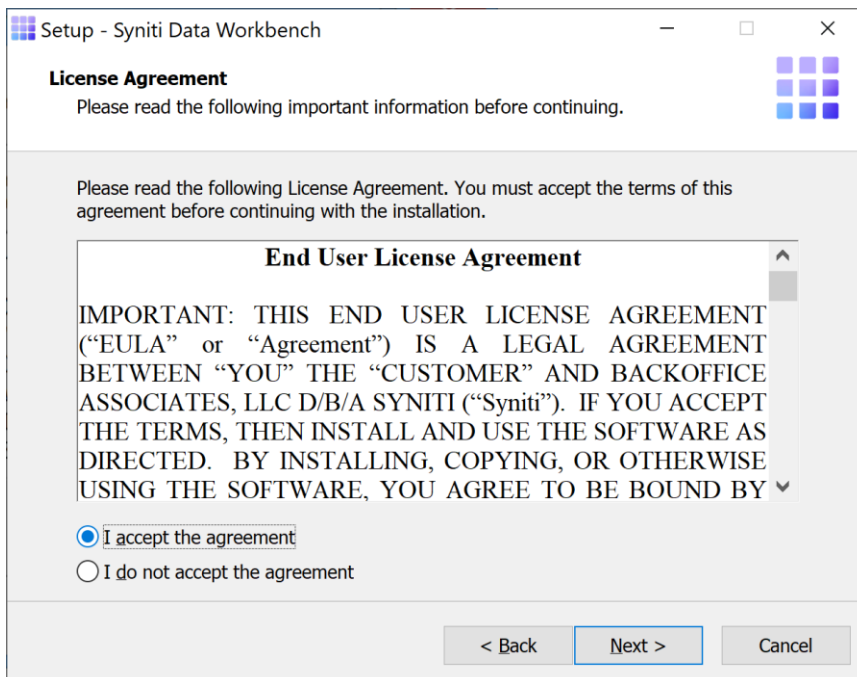
Run the DataWorkbenchSetup.exe file for each client as follows.

1. Double-click on the DataWorkbenchSetup.exe file.
   The Syniti Data Workbench Setup launches automatically.

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

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

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

5. Review the installation options.

6. Click **Next** to continue.

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

8. Click **Next** to continue.

9. On the *Select Components* page, select **Enterprise Client Installation** from the drop-down menu**.**
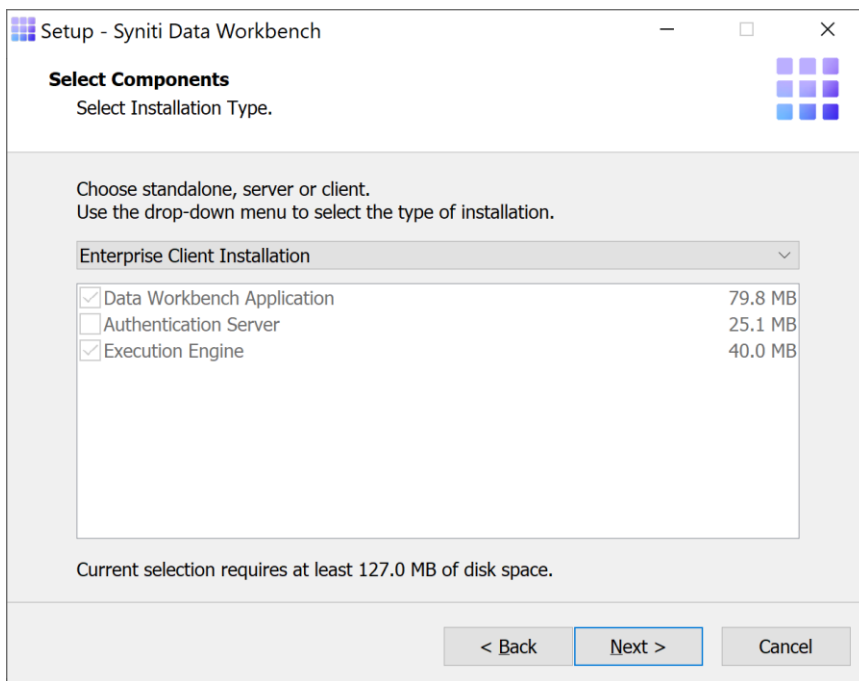
10. Click **Next**.

11. On the *Server Location* page, replace the default "localhost" value with the name or IP address of the Windows server where the Data Workbench server component was installed. Your system administrator should provide this value.

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12. Type the port number for the Data Workbench server. Your system administrator should provide this value.

13. Click **Next**.
    The Ready to Install page displays the required components that will also be installed. The .NET Framework 4.5 may be Installed if your system is running a version of .NET Framework earlier than 4.5.

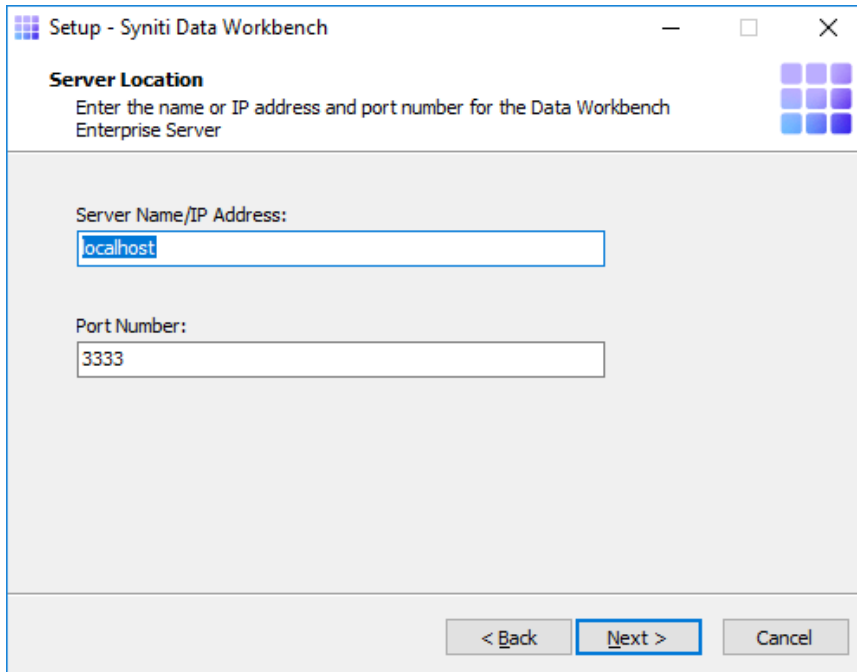14. Click **Install**; to install required components and the Data Workbench application.

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

16. Click **Finish** to complete the setup.

Install/Upgrade Data Workbench without Microsoft SQL Server

DataWorkbenchSetup.exe installs SQL Server Express 2017 on 64-bit systems and SQL Server Express 2014 on 32-bit systems. The Data Workbench installation of SQL Server Express takes care of all configuration and prepares the SQL Server for use with Data Workbench.

If you prefer to use an existing installation of SQL Server in your environment, or download a different version of SQL Server, follow the steps below to ensure that SQL Server is set up correctly for the Data Workbench installation. 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.

IMPORTANT: **SQL Server must be installed prior to installing Data Workbench** (unless you are planning to use the version installed with Data Workbench.)

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Use an Existing SQL Server Installation

When installing a Stand Alone or Enterprise Server version of Data Workbench, you may already have a version of SQL Server installed in your environment where you would like to create the QAS database used by Data Workbench.

Before proceeding with the Data Workbench installation, check that the following settings are in place for SQL Server.

- The Named Instance and Instance ID should match.
- The server should be configured for Mixed Mode (SQL Server authentication and Windows authentication).
- The SQL Server login ID used during Data Workbench installation should have authorization to create users, databases and tables.

Install Data Workbench

Proceed with installation of Data Workbench as follows:

1. Open a Windows command prompt.
2. Change to the directory containing the Data Workbench setup
3. Run DataWorkbenchSetup.exe from the Windows command line using the /CUSTOMDB option.
   DataWorkbenchSetup.exe /CUSTOMDB

   The Syniti Data Workbench Setup launches automatically.
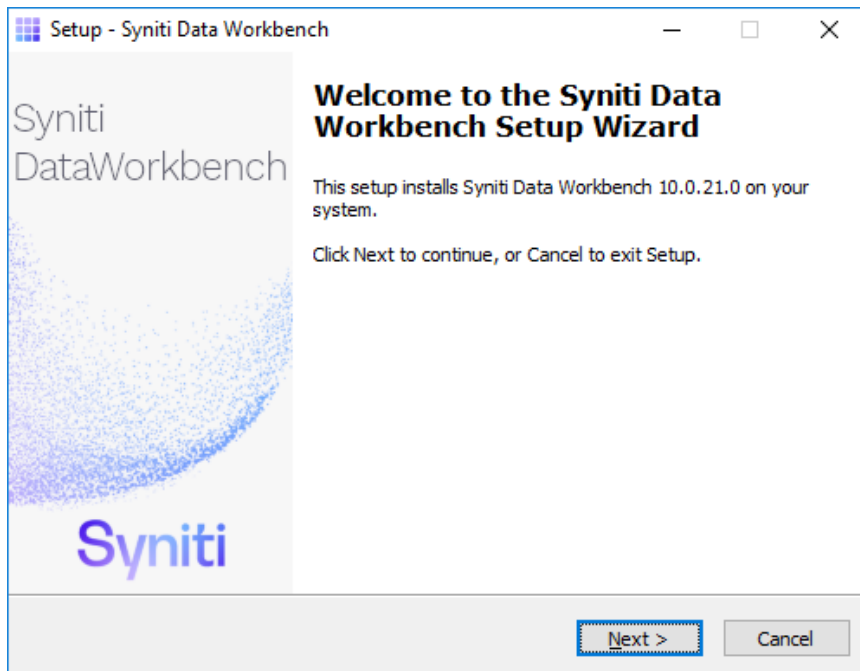
4. Click **Next** to display the license agreement.

Syniti Data Workbench
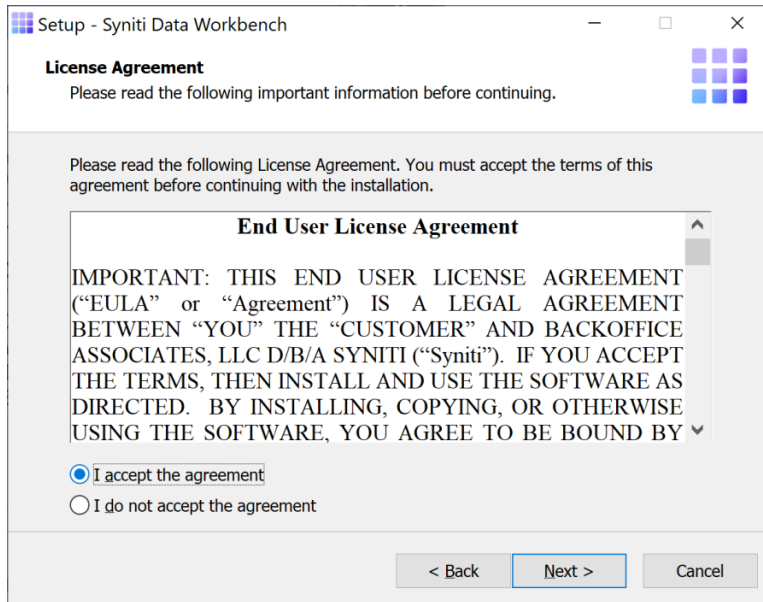
5. Review the agreement and click **I accept the agreement**.

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

7. Review the installation options.
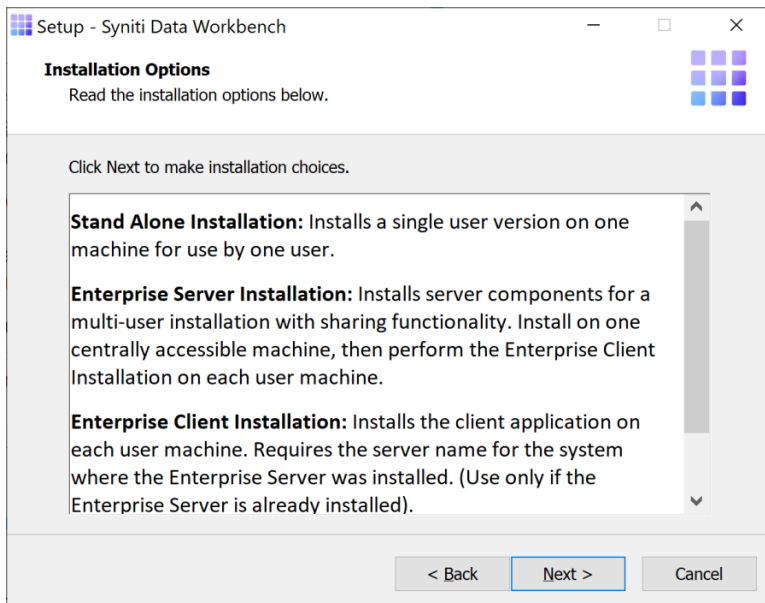
8. Click **Next** to continue.

9. Choose a location to install the Data Workbench files, or leave the default.
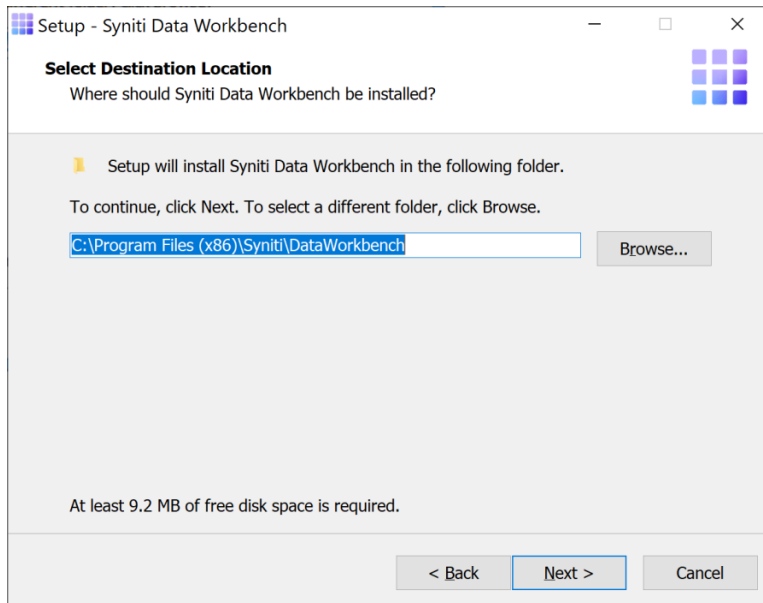
10. Click **Next** to continue.

11. 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

- Or, **Custom Installation** if you are planning to run the Data Workbench GUI and uploads/downloads on the server.

  o Click to check all three components for installation.

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

o   (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.

12. Click **Next** to continue.

The Ready to Install page displays any 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.

13. Click **Install**; to install required components and the Data Workbench application.
Dependencies are downloaded.
If .NET Framework is required, you may be asked to confirm download and installation. Do not skip this step.

14. Click **Finish** to complete the setup.
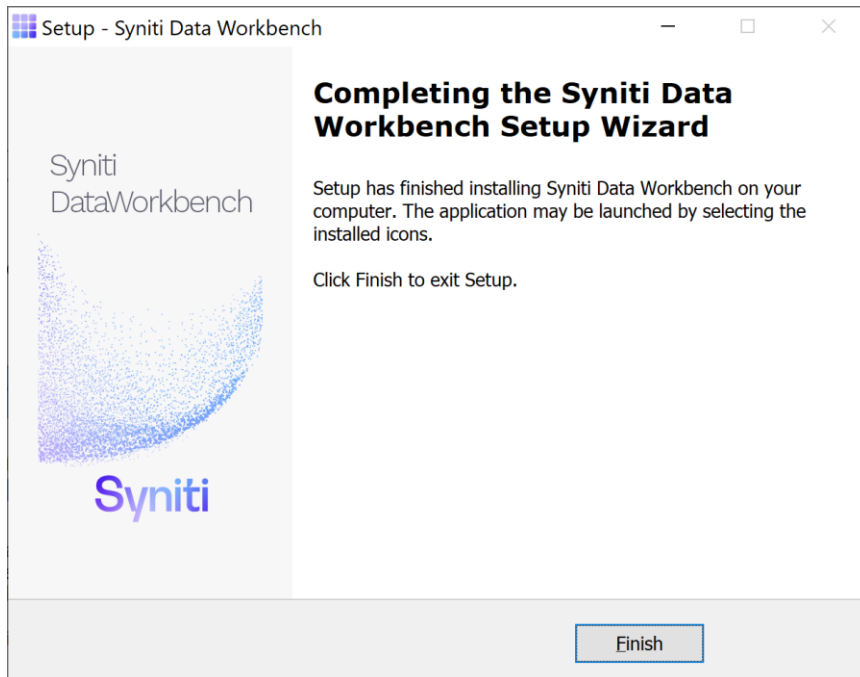
15. Set up the QAS database in SQL Server. It is highly recommended that a SQL Server Administrator perform these steps.

• Contact the Data Workbench support team in the Help Center to request the SQL scripts to create and configure the QAS database.

• Run the scripts as requested by the support team.

16. Configure Data Workbench to use your SQL Server version. To complete this step, you need to know the host and instance name for your SQL Server installation.

• Open the Windows Services tool.

• Locate the **QAS** service.

• Right click on the service name and select **Stop**.

• In the C:\Program Files (x86)\Quadrate\QAS folder, make a backup copy of **QuadrateAuthenticationServer.Service.exe.config**.

• Edit **QuadrateAuthenticationServer.Service.exe.config**.

• Delete the portion of the file starting with <connectionStrings> ending with </connectionStrings>.

• In the same location in **QuadrateAuthenticationServer.Service.exe.config**, copy the following code.

```
<connectionStrings>
<add
name="QuadrateAuthenticationServer.DataLayer.Properties.Settings.QuadrateAuthenticati
onServerConnectionString"
connectionString="Data Source=localhost\QUADRATE;Initial Catalog=QAS;Persist Security
```

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```
Info=True; User ID=qasUser;Password=Qu@dr8q@s" providerName="System.Data.SqlClient"/>
</connectionStrings>
```

17. Replace **localhost\QUADRATE** with the server name or IP address and instance name of your SQL Server installation.

18. The code above uses a default user ID and password for the QAS database. If your system administrator has provided you with a different user ID and password, edit the User ID and Password values.

19. Start the **QAS** Service.

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

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

22. The next step is to Activate Data Workbench.

Install a Different Version of Microsoft SQL Server

1. Download the appropriate SQL Server version from the Microsoft website.

2. Run the installer.

3. Click New SQL Server stand-alone installation or add features to an existing installation.

4. Choose the option Perform a new installation of SQL Server.

5. During the installation process, choose the following options:

- SQL Server installations for use with Data Workbench must include **Database Engine Services**.

Syniti Data Workbench
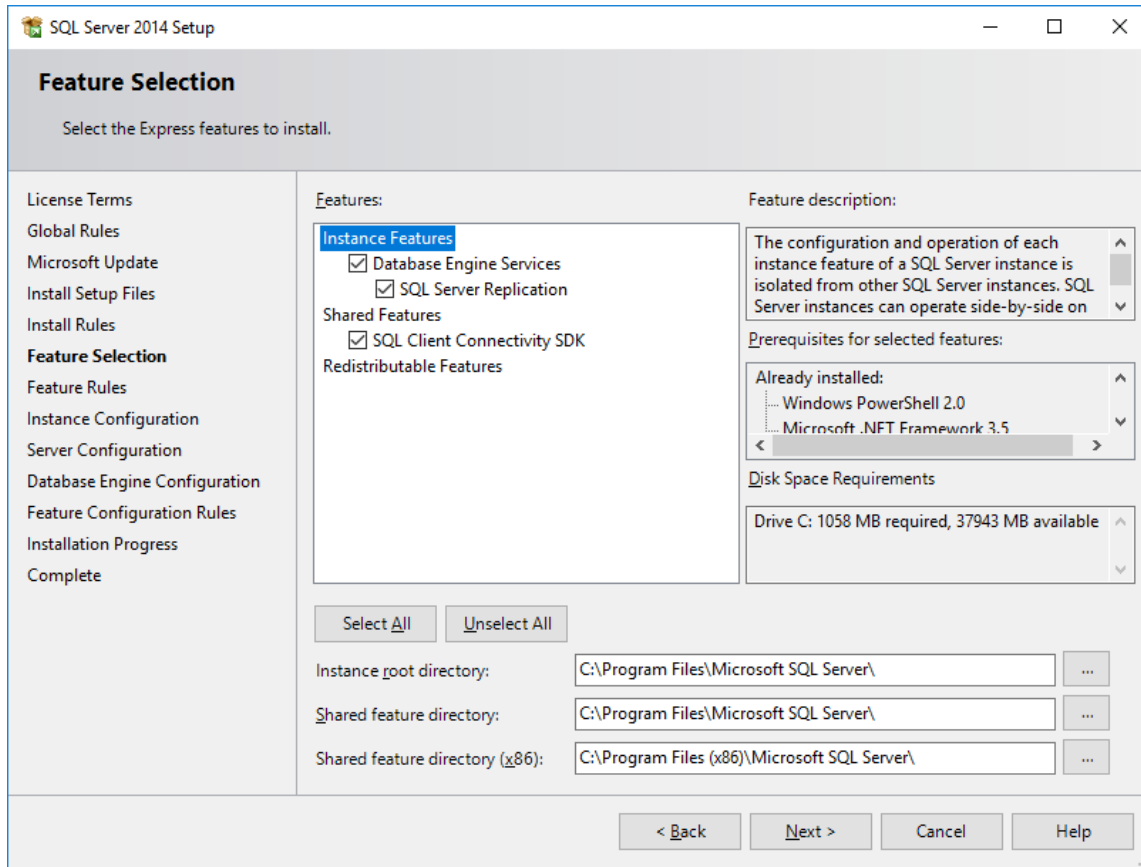
- Click the **Named Instance** option and enter **QUADRATE** into the text box for Named Instance **and** Instance ID.
  NOTE: Both **the named instance and the instance ID must match**. QUADRATE is the name used during a standard installation, but you can also use a different name.

Syniti Data Workbench
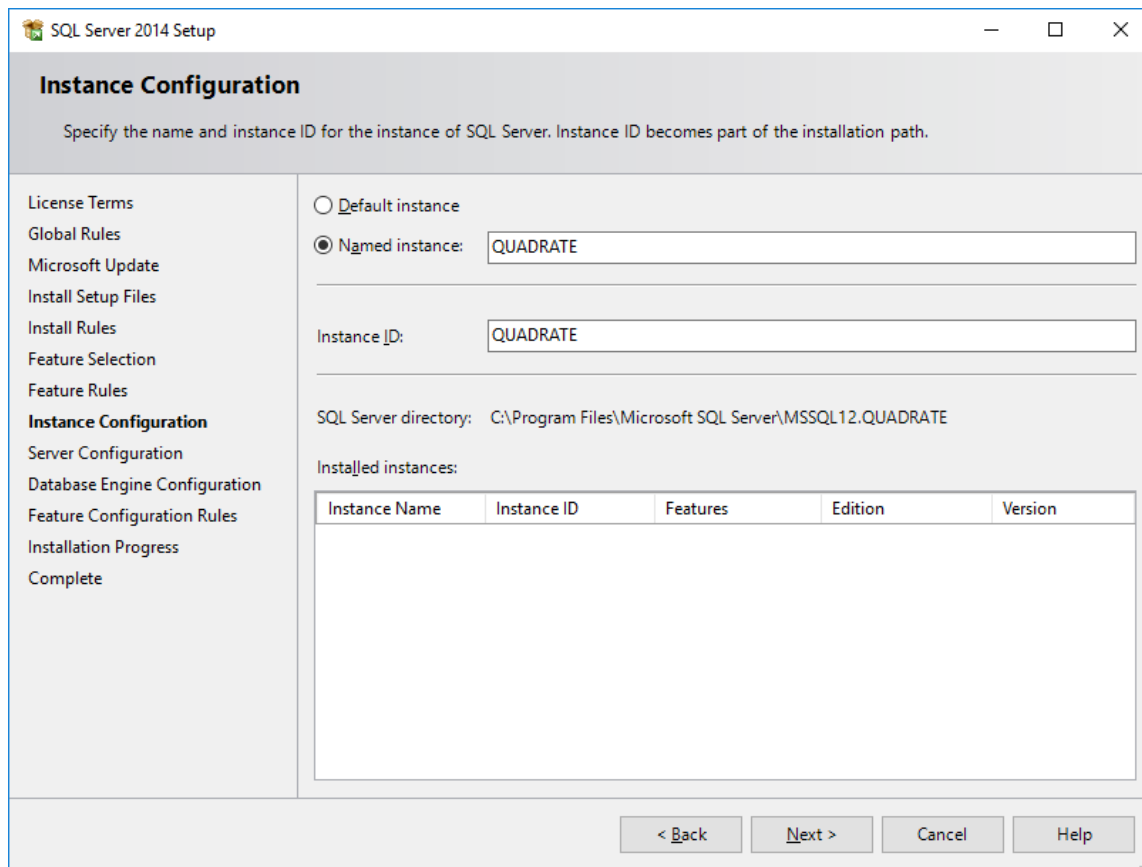
- On the Server Configuration tab, use the **Mixed Mode (SQL Server authentication and Windows authentication)** option and create a strong password for the SQL Server Administrator (sa) account. Be sure to note the sa password. It will be used in the Data Workbench installation.
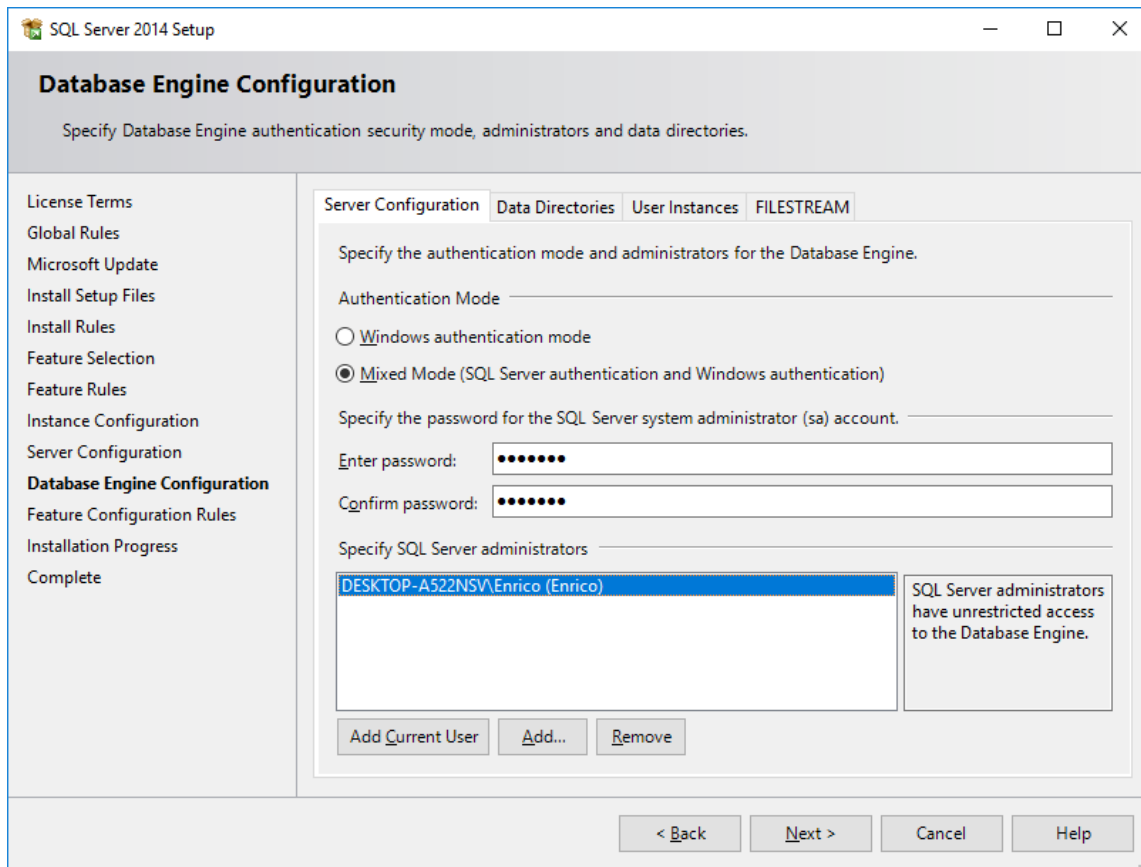
- Other options can be left as default.

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

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

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

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

10. Once these steps have been completed, you can proceed with Install 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.

- Online Activation
- Offline License File Activation

Syniti Data Workbench

Online Activation

1. Enter the product key in the text box on the first page of the Activation Wizard.
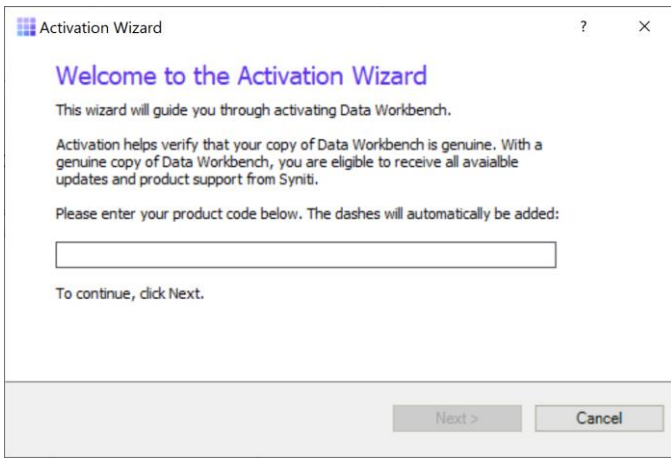
2. Click **Next**.

3. Select **Activate Data Workbench Online**.
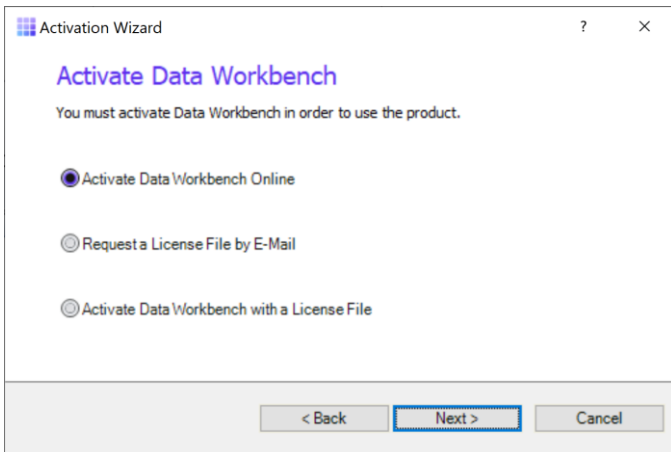
4. Click **Next**.

   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.

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

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

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

Offline License File Activation

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

2. Click **Next**.

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

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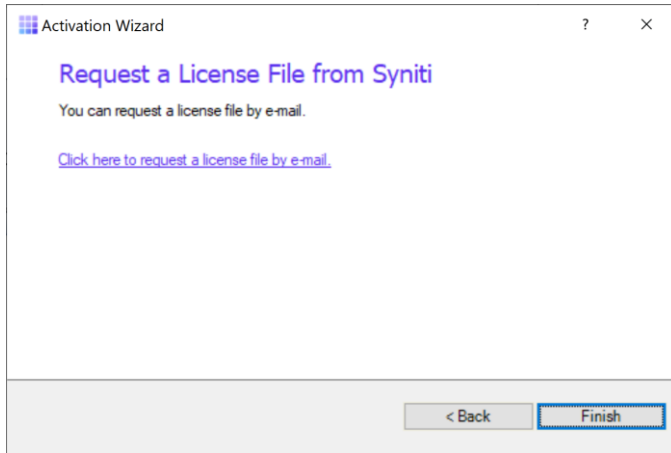
5. Choose the **Click here to request a license file by e-mail** option to open an email client with a message to send to the Syniti licensing team.

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

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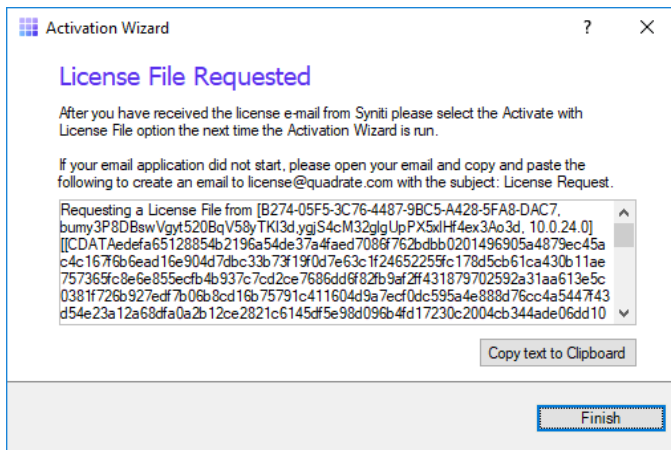
7. Click **Finish**.

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

9. Start Data Workbench.

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

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

12. Click **Next** to continue.

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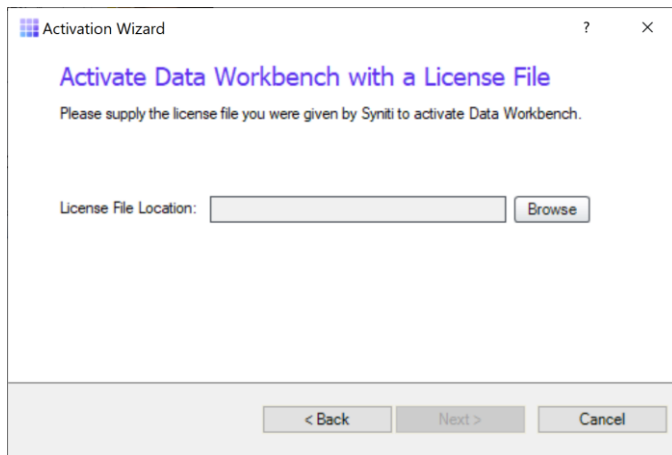
14. Click **Next** to continue.

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

16. You should now be able to log in to Data Workbench using 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.

Configure Data Workbench

Logging on for the first time (Enterprise Installation Only)

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

User name	admin
Password	admin

Add SAP Systems

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

To add system instances:

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

2. Click the **Administration** tab.

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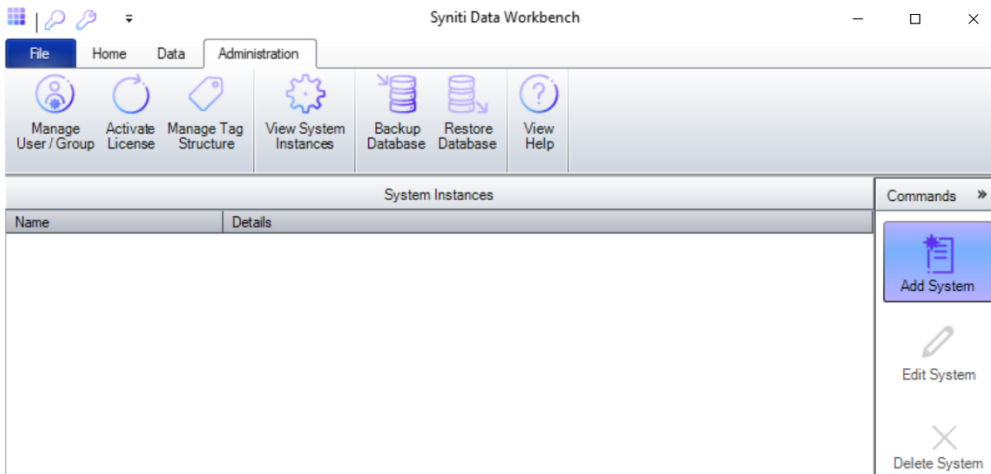
4. Click **Add System**.

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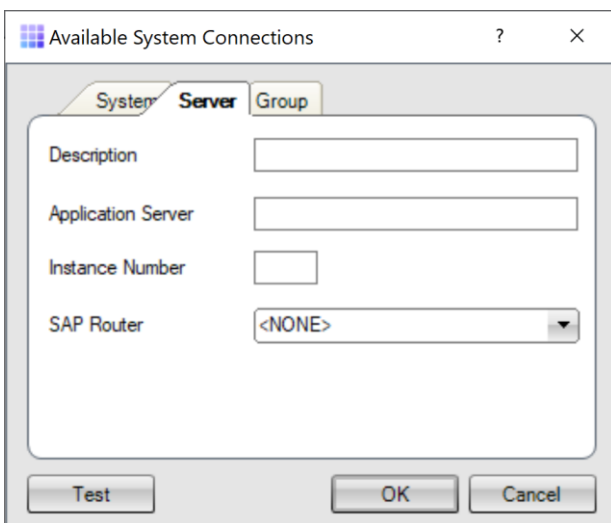
6. Click **OK.**

To grant access to a system:

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

2. Select the relevant user.

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3. Select the **Permissions** tab.
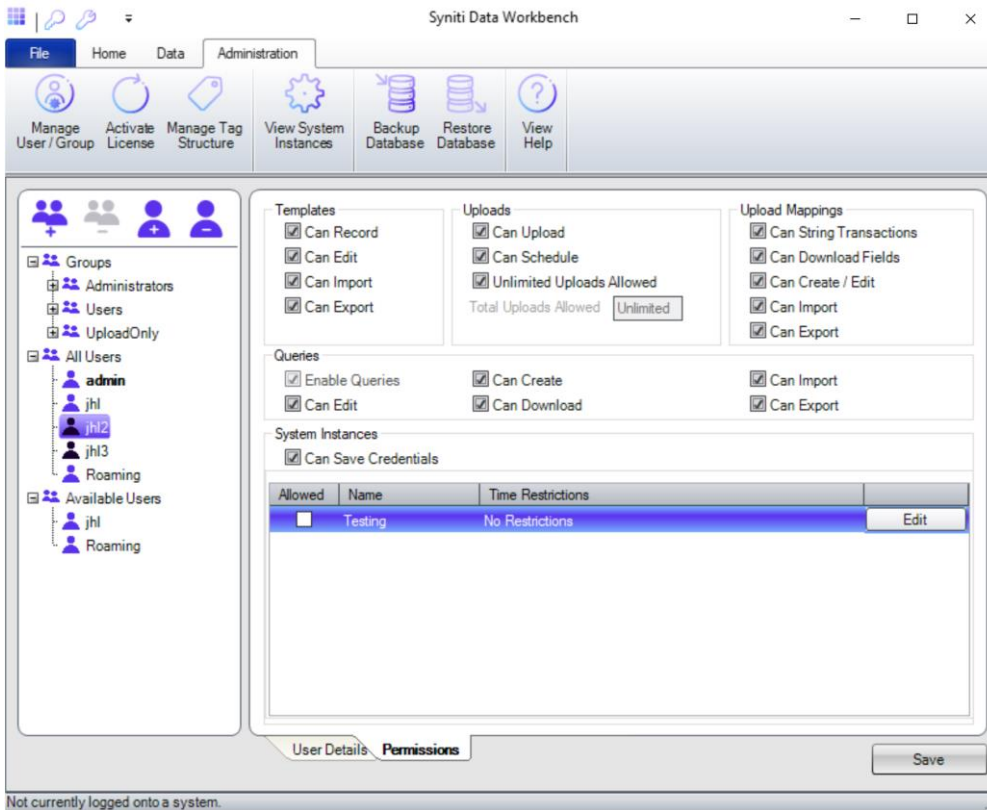
4. Click the **Allowed** checkbox to grant or deny access to each system.

5. Click **Save**.

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

Set up Local Help

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

Syniti Data Workbench
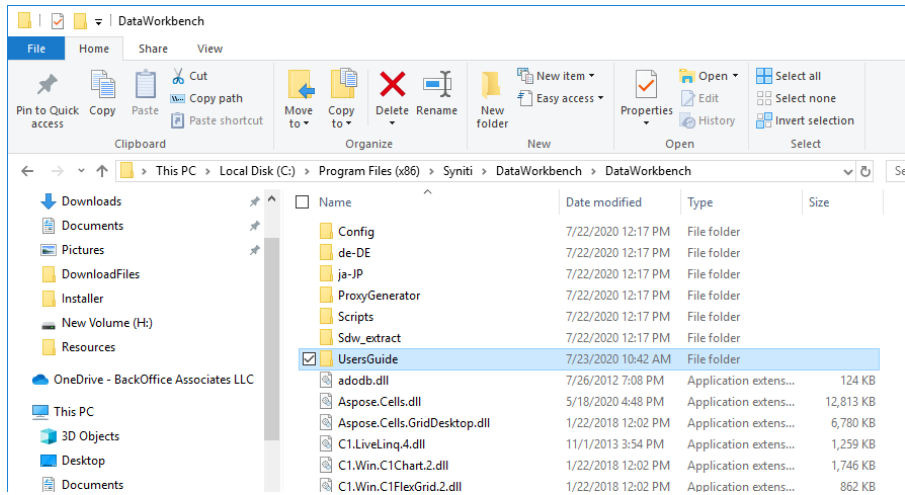
3. Open the **User Preferences** from the icon at the top of the Data Workbench window.
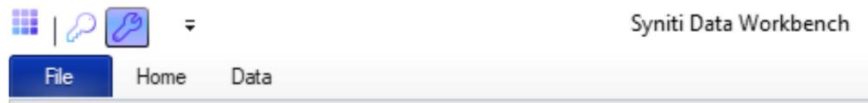
4. Check the **Use Local Help** option.

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

Customize Installation

Set an IP Address to Access SQL Server

After installation of Data Workbench and SQL Server, you can use the Install Upgrade Tool to modify the configuration to use an IP address instead of the machine name when accessing the QAS database.

1. Complete installation of Data Workbench and SQL Server.

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

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

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

5. 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.

6. 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.

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7. Double-click on the self-extracting installation package **SynitiDataWorkbench_SelfExtractingSetup.exe**.
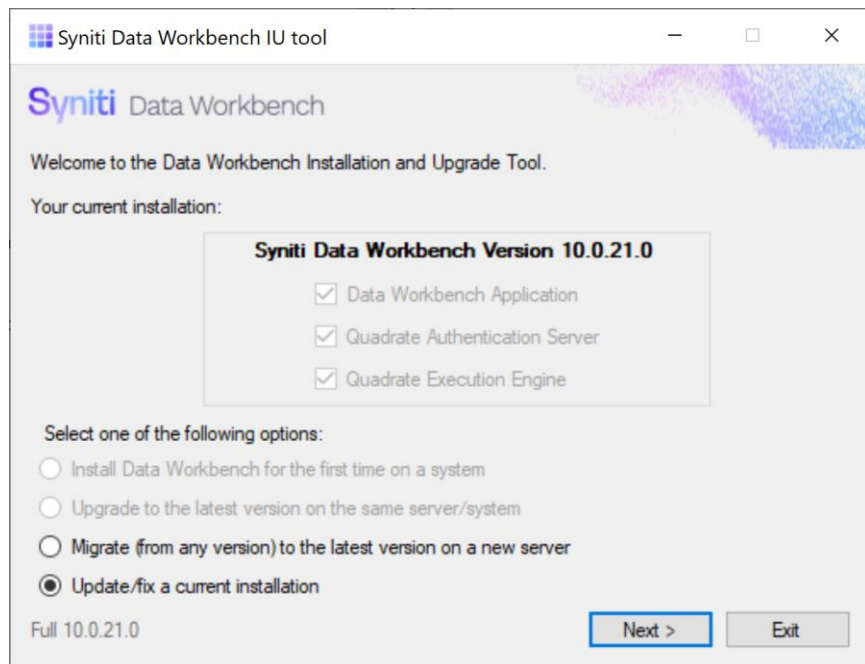
8. Choose the option **Update/Fix a current installation**.

9. Click **Next**.

10. Check the **Use IP Address** option.

Syniti Data Workbench
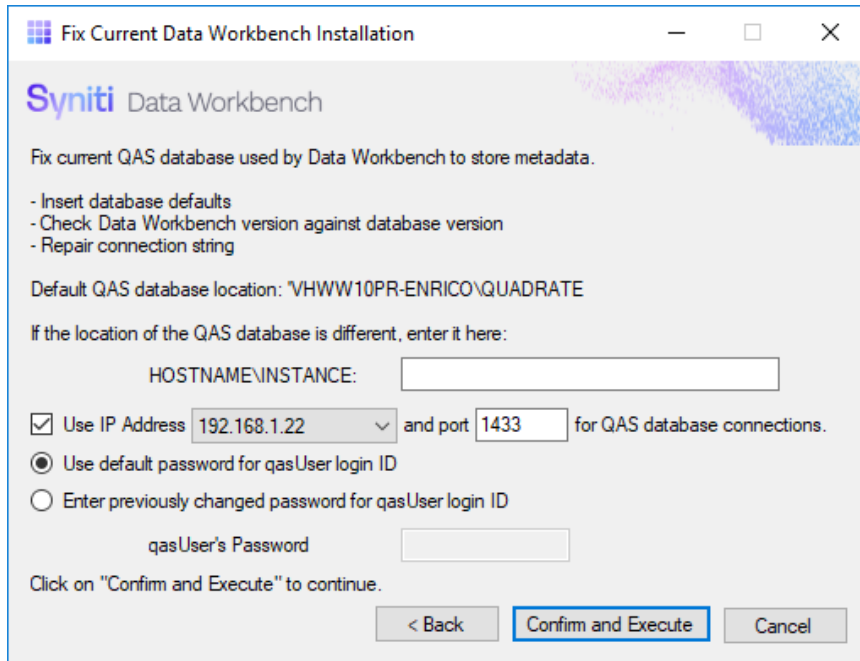
11. Enter the IP address for SQL Server.

12. Change the default port number 1433 only if you know that the port number has been modified during or after SQL Server installation.

13. Click Confirm and Execute.

Complete steps to update the IP address and port number.

Create a Client Install Package

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

1. Open a Windows command prompt as Administrator.

2. Change directory to the folder containing the DataWorkbenchSetup.exe.

3. 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.

4. Complete the installation as normal, selecting Enterprise Client as the installation type.

5. Copy the `DataWorkbenchSetup.exe` and the `unattended.inf` file to the same folder on the next (and all subsequent) clients.

6. Open a Windows command prompt.

7. 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.

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8. 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.
/QEEPORT=ee_port	Specifies the port that the Execution Engine is running on. Default is port 3334.
/EMAILSERVER=smtp_svr	Specifies the SMTP server that the Execution Engine will use for scheduled upload emails.
/SP-	Disables the *This will install... Do you wish to continue?* prompt at the beginning of setup. Has no effect if the DisableStartupPrompt [Setup] section directive was set to yes.
/SILENT, /VERYSILENT	SILENT: wizard and background window are not displayed but installation progress window is. If a restart is necessary and the '/NORESTART' command is not used, a *Reboot now?* message is displayed. VERY SILENT: wizard, background window, installation progress window, Reboot now message are not displayed. Always displayed: error messages during installation, startup prompt (if not disabled with DisableStartupPrompt or the '/SP-' command line option).
/SUPPRESSMSGBOXES	Suppresses message boxes. Only has an effect when combined with '/SILENT' and '/VERYSILENT'. Default response when a choice is offered: Yes in a 'Keep newer file?' situation. No in a 'File exists, confirm overwrite.' situation. Abort in Abort/Retry situations. Cancel in Retry/Cancel situations. Yes (=continue) in a DiskSpaceWarning/DirExists/DirDoesntExist/NoUninstallWarning/ExitSetupMessage/ConfirmUninstall situation. Yes (=restart) in a FinishedRestartMessage/UninstalledAndNeedsRestart situation.

| | 5 message boxes are not suppressible: |
	The About Setup message box.
	The Exit Setup? message box.
	Any (error) message box displayed before Setup (or Uninstall) could read the command line parameters.
	Any message box displayed by [Code] support function MsgBox.
/LOG	Creates a log file in the user's TEMP directory detailing file installation and [Run] actions taken during the installation process. Helpful if you suspect a file is not being replaced when it should be.
	The log file is created with a unique name based on the current date. (It will not overwrite or append to existing files.)
	Log file information is intended for use by administrators and Data Workbench support team. The format of the file is subject to change without notice.
/LOG="filename"	Same as /LOG, except it allows you to specify a fixed path/filename to use for the log file. If a file with the specified name already exists it will be overwritten. If the file cannot be created, setup will abort with an error message.
/NOCANCEL	Prevents the user from cancelling during the installation process, by disabling the Cancel button and ignoring clicks on the Close button. Useful along with '/SILENT' or '/VERYSILENT'.
/NORESTART	Setup does not reboot even when necessary.
/LOADINF="filename"	Loads settings from the specified file after checkingthe command line. This file can be prepared using '/SAVEINF='.
	NOTE: Use quotes if the filename contains spaces.
/SAVEINF="filename"	Saves installation settings to the specified file.
	NOTE: Use quotes if the filename contains spaces.
/LANG=language	Specifies the language to use. *language* specifies the internal name of the language as specified in a [Languages] section entry.
	When a valid /LANG parameter is used, the *Select Language* dialog will be suppressed.
/DIR="x:\dirname"	Overrides the default directory name displayed on the *Select Destination Location* wizard page. A fully qualified pathname must be specified.
/GROUP="folder name"	Overrides the default folder name displayed on the *Select Start Menu Folder* wizard page. If the [Setup] section directive DisableProgramGroupPage was set to yes, this command line parameter is ignored.

Change Execution Engine Privileges

The Execution Engine service is automatically configured to run under the Local System account. This account does not have sufficient privileges to access files external to the current computer. To allow the service to read

and write from network shares and other external locations, the service must be configured to run as a user with the correct privileges. If the current user can access these locations then the current user details can be used.

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

To change the user credentials of the service:

1. Open **Control Panel.**

2. Open **Administrative Tools.**

3. Open **Services**.

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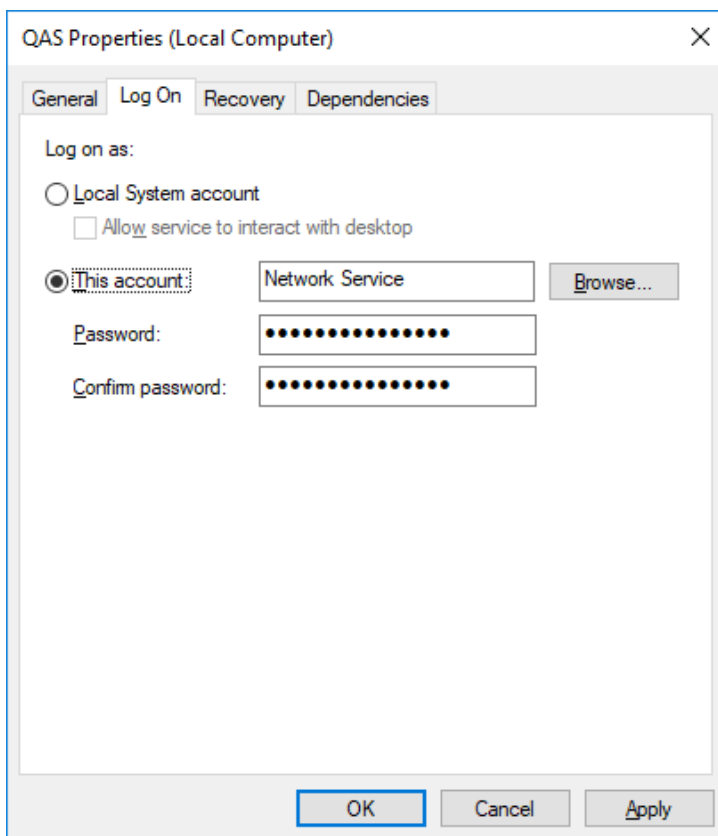
5. Click the **Log On** tab.

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

7. Enter the new username.

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

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

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

Syniti Data Workbench

Troubleshooting

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.
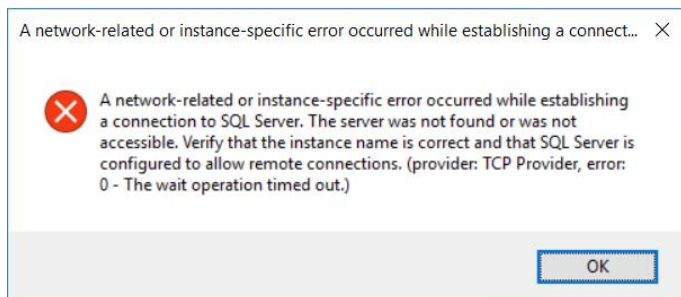
After checking to see that the correct IP address has been defined for the client in the User Preferences dialog, if the error still occurs, the most likely cause is that the QAS database has stored the machine name instead of the IP address. The recommended way to fix this issue is to run the Install Upgrade Tool.

SQL Server Does Not Allow Remote Connections

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

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

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

Create Exceptions in Windows Firewall

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

1. Find the SQL Server Instance ID

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**.

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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.
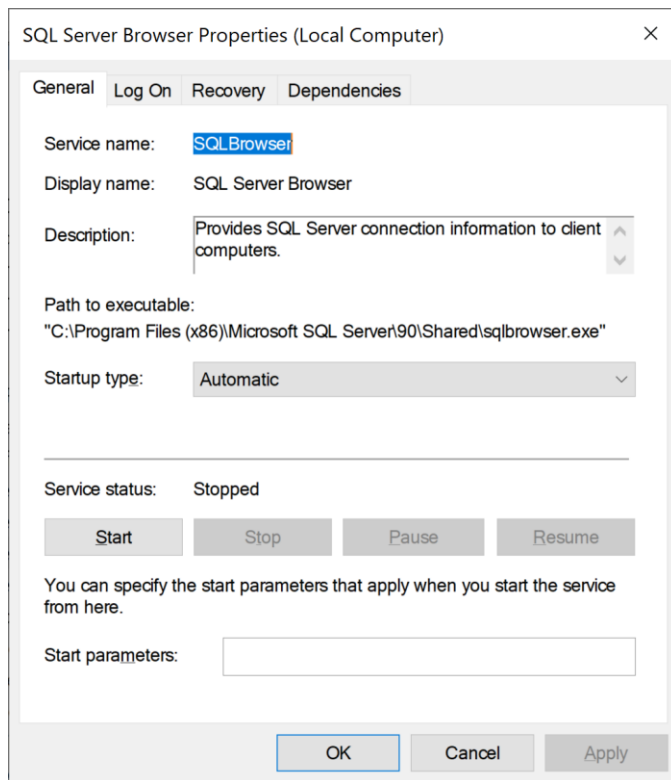
Clients Unable to Connect – SQL Server Browser Service

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**.

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

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

Last Updated: October 7, 2020