Data Access Studio Install/Upgrade Guide for JDE World

ReportsNow®

Contents

System Requirements

To successfully install and run Data Access Studio, your system must meet the following minimum requirements.

Data Access Studio Server:

- Windows Server 2008 SP2, or greater
- 2 processor cores per 20 clients *(1 processor core per 20 users minimum)*
  - Automator requires at a minimum 2 processor cores per 20 clients
- 4 GB RAM per 20 clients *(2GB per 20 users minimum)*
  - Use of server side summarization requires at a minimum 4 GB RAM per 20 clients
- .NET Framework v4.6 or greater
- IIS 7.0+
- For JDE World:
  - IBM Client Access Versions V5R4M0 or higher and matching the JDE World server's version. The latest service pack must also be applied.
- For External Data sources:
  - Appropriate 32-bit or 64-bit drivers for the targeted databases
- For Automator:
  - Microsoft Excel 2010, 2013, or 2016 *(2007 minimum)*. Highest version of Excel for your organization.

Data Access Studio Client:

- Windows 7 or greater
- 4 GB RAM (2 GB Minimum)
- .NET Framework v4.6 or greater
- Microsoft Excel 2010, 2013, or 2016 (2007 minimum)
- Browser Support
  - Internet Explorer
  - Microsoft Edge
  Note: The following browsers are not supported, however have been known to work with appropriate Microsoft ClickOnce plug-ins:
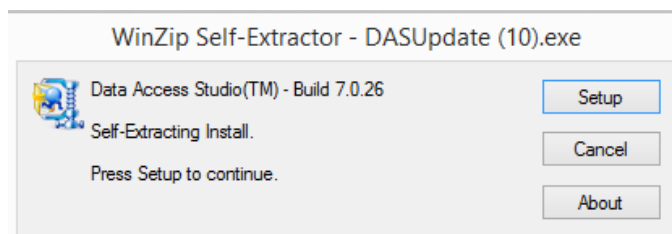 - Mozilla Firefox
  - Chrome

Downloading and Installing/Upgrading DAS

Follow these steps to download the latest version of Data Access Studio. **Please note DAS7 requires .NET Framework 4.6 or greater on the DAS server and all client machines.**
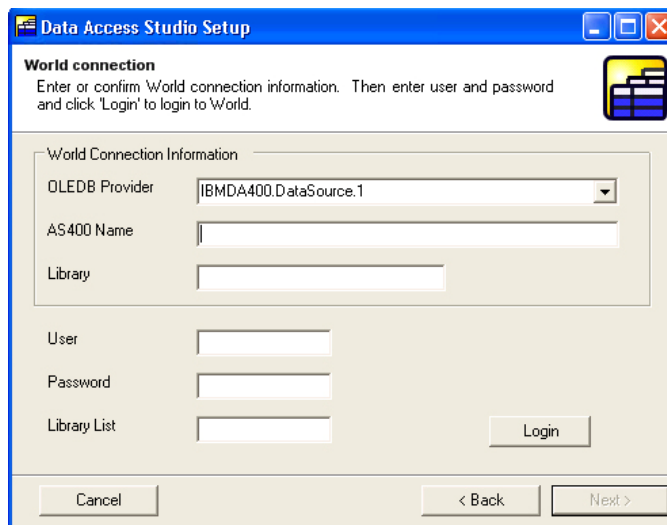
1. Download DASUpdate.exe from our [Download Center](#) to the DAS server.

   Note: If this is just an upgrade, and you have a Web deployment, please stop the DAS Automator and Data Access Studio services first. Kill any DASWorker.exe processes and continue. If you are a DAS mobie customer and have DAS mobie hosted on the same server as your DAS web server, please also download the MOBIEPortal.zip file to the same directory as the DASupdate.exe so that the installer can detect it during the installation.

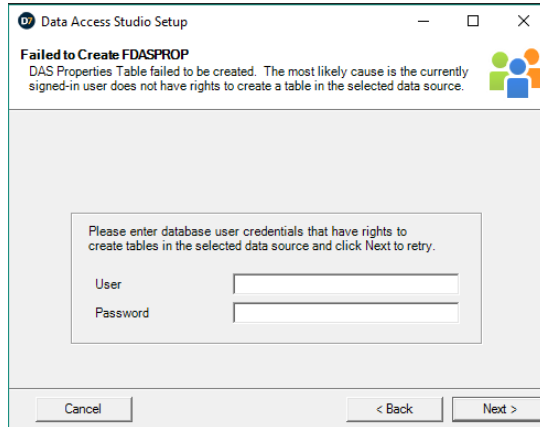2. Run the DASUpdate.exe you just downloaded from your DAS server and click Setup.

3. Fill in the required fields on the next screen. If this is an upgrade, AS400 Name and Library will automatically be populated.

- Select OLEDB Provider IBMDA400.DataSource.1. If you do not see this in the available list, then   you need to cancel this install and then install Client Access OLEDB Provider 10.00 or higher.
- Enter your AS400 Name
- Enter the library where to find the F0094 (Library list table).
- Enter your World account information: user, password and library list and click Login.

  If this is the first time you are installing Data Access Studio, you need to provide the database user and password to generate the "FDASPROP". This table is the main storage table for Data Access Studio. This is the table where DAS stores   layouts, published reports, user preferences etc
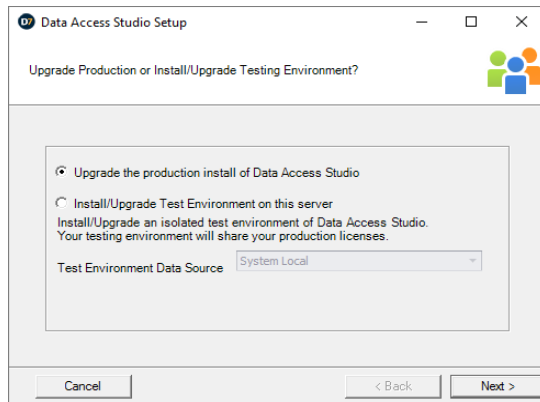
NOTE: In order to generate this table, you MUST have developer rights to CREATE TABLE. This would typically require a JDE Admin username and password for the database. If the entered username and password does not have permissions, you will be prompted with a new window to enter the database username and password as seen below:

- If the login or connection fails, the install will pop up text screens with error information. Use this information to trouble shoot the connection problem. If you cannot resolve the issue with the information provided, please send the error information to support@ReportsNow.com and we can assist you.

Note: If this is an upgrade, the following window will be displayed:

Please choose the first option (Upgrade the production install of DAS) and click Next. For more information on running it against a test environment, please review the following article:

https://support.reportsnow.com/hc/en-us/articles/218281578

4. Once the FDASPROP table is created and DAS has been installed successfully, you may deploy DAS in one or more of the following ways:

- **Web**- Your users are located in a Wide Area Network. Users run DAS from a web page link hosted by IIS. DAS consumed resources on the DAS Web server, the user's workstation and the database.

- **Citrix**- In Citrix deployment, your users do not have a JDE client and are typically located on WAN. Once installed and published on Citrix, your users dial in to the Citrix server and run DAS. DAS consumes resources from the Citrix server and database.
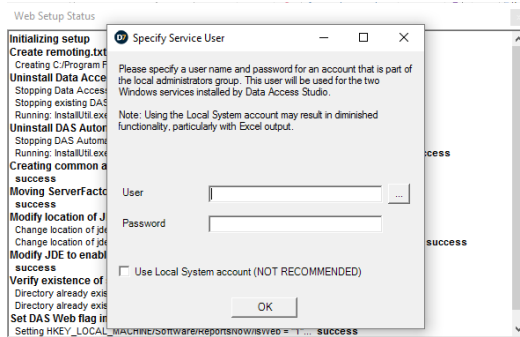
Web Install Procedure

1. When DAS is installed on your web server, you need run a script to convert it from a Workstation mode to a Web mode. Please go to the directory where DAS is installed and run websetup.exe. Please make sure IIS is installed on the DAS server. The script will automatically configure IIS.
   Note: If this is an upgrade, it will automatically prompt you to run the Web Setup. Click "Yes" to continue. **Warning:** Clicking Yes will disconnect any active users!

Fill in the fields as follows or accept the defaults and click **Setup Web.**

Field	Description
Channel	Select http.
Compress	This is checked by default and it helps if you are running over a slow network connection or WAN.
Encrypt	Check to encrypt the network traffic. Check this if you are running over an unsecured network

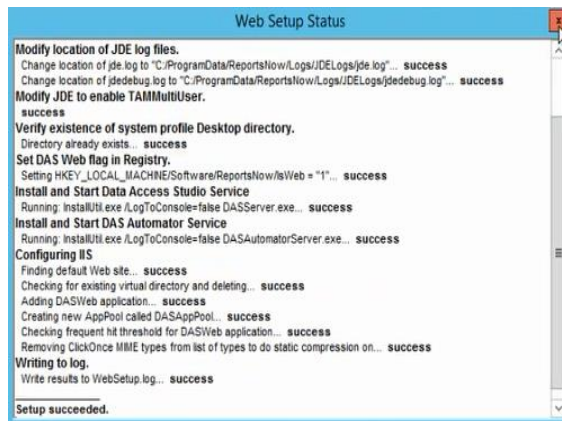|	
Listener Port	The port for the DAS Server service. **IMPORTANT!** If you run a firewall, make sure this port is open.
Start Port	The port that the DAS Server service will start with to assign client connections
Maximum Connections	The maximum number of allowed client connections. Use this setting to limit the number of users per server as you see fit. **IMPORTANT!** If you run a firewall, make sure the range of Start Port to Start Port + Maximum Connections is open. The default setting is 20. Please increase to the number of licenses you purchased.
Lease Timeout	The number of seconds a DASWorker will stay alive after a client session has disconnected. When the client session ends abnormally, this timeout ensures that the corresponding server executable gets cleaned up. Using the default timeout is recommended. **IMPORTANT!** If your clients experience timeouts when running DAS, try increasing the value of this parameter.
Signin Timeout	Once a user signs in, this is the number of seconds the server has to create a session for the user. If users have trouble signing in, try increasing this value. Otherwise, the default timeout is recommended.
Idle Timeout	Version 4.9 and higher. If set to a non-zero amount, this will set the number of minutes the software will allow the client to run before automatically shutting it down. For instance, if you set to 30 minutes, then if the web client is idle for 30 minutes, the software will issue a 20 second idle warning and then shutdown the client -- thereby freeing the concurrent license and any system resources the client held. This will not boot any users with unsaved work.
Firewall Machine Name	Leave blank. You can fill in this field with the name the server is known by from client machines only in cases where the server has multiple NICs that serve different IP's or if the IP address the machine is communicating over is different server name or IP than the client knows the server by.
URL	The IP or machine name of the DAS Server that is known by from client machines that will connect to it
Prompt before setup	When you press "Setup Web" on the menu bar and this field is checked, the setup program will display a message box that warns you that you are about to setup the Web Server. Any DAS client that is connected to the existing Web server will be disconnected.
Mixed-case password	Check this box if you are using LDAP security or other login authentication that accepts passwords that are not all uppercase.

2. You will be prompted with the following window. We recommend changing the service accounts from Local System to an account that is a member of the machine's built in Administrators group.
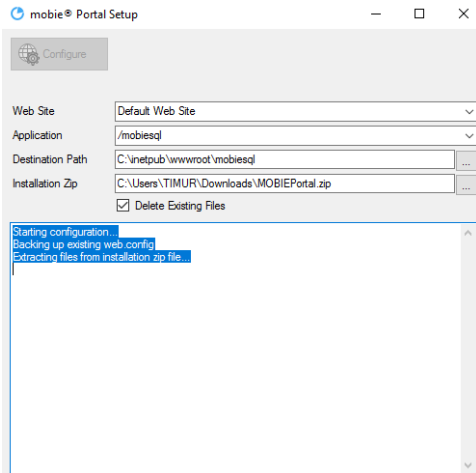
    Note: If this is an upgrade, you will not be prompted for this. It will continue to use the service account that it was running under.

3. When the install is complete you will see "Setup Succeeded".

NOTE (Upgrades only): If you are a DAS mobie customer and it is being hosted on the same DAS web server, if you initially downloaded the DASUpdate.exe and MOBIEPortal.zip file in the same directory, it will bring up the following window. The WebSetup and mobie configuration windows may both come up at the same time and it does not matter which order they are done in. If the MobiePortal.zip is not in the same directory as DASUpdate.exe then you will need to select it. Click the visual assist (...) for the installation zip file location and pick the MOBIEPortal.zip file you download and click Configure.

To run DAS from a browser, type: "http://<WebServerName>/DASWeb/ " . If you have a slow connection, DAS may take up to a minute to load. Once DAS is loaded, the browser will cache the downloaded information so that future sign-ons go faster.

Citrix Install Procedure

There are two primary variations on how to install DAS in a Citrix environment:
1. **Citrix-only approach**: Install DAS completely on the Citrix server with all of its necessary prerequisites (in particular, the JDE client install)
2. **Hybrid approach**: Install DAS on a web server (see Web Install Procedure), and then install the client on the Citrix server to connect to the DAS web server.

Citrix-only approach:

After you have installed Data Access Studio, publish DataAccessStudio.exe application to your Citrix users.
Executable location is:
C:\Program Files (x86)\ReportsNow\Data Access Studio\DataAccessStudio.exe

Hybrid approach procedure:

Installing DAS on Citrix using the hybrid approach assumes that you have already done a normal DAS Web client installation on another server. In this configuration, the Citrix server acts very much like a Web client with one important difference. The difference is that the DAS client should be installed and published on the Citrix server as opposed to publish the Web link that other Web client users would use when accessing the DAS Web server. Publishing the Web link on the Citrix server has numerous problems:

1. Citrix on Windows operating systems prior to Windows Server 2012 R2 do not support Microsoft .NET ClickOnce deployment, which is what is used by DAS when connecting via the Web URL.
2. Resource consumption is much higher, because each user has their own copy of the DAS application as opposed to using one shared installation.

To install the DAS client on the Citrix server, please copy the Data Access Studio folder located on the DAS Web server (C:\Program Files(x86)\ReportsNow\) to a location on your Citrix server.

At this point, you will want to publish the DataAccessStudio.exe application on the Citrix server to your Citrix users.

Maintenance Considerations for Hybrid approach:

To maintain this installation, the version of DAS installed on the Web server must be kept in sync with the version installed on the Citrix server. Any time an updated installation is performed on the DAS Web server, the Citrix server should also be updated using the mechanism described above.

Similarly, the Remoting.txt file should also be kept in sync. If any changes to configuration options in the DAS WebSetup utility are made on the DAS Web server, these will result in changes to the Remoting.txt file and the Remoting.txt file should again be copied to the Citrix server.
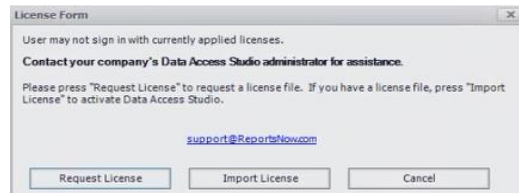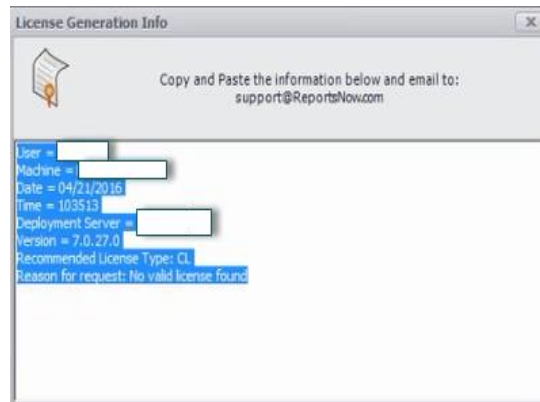
Requesting and Importing License Key

1. Sign in to Data Access Studio

2. You will be prompted to Request License, Import License, Cancel.

   a. Click on Request License.

   b. Copy and paste the information and email it to support@reportsnow.com
   Once we receive the request, ReportsNow will generate a 30 day key and email you the
   license file. Upon receipt, save the file to a local folder and click on Import License to
   import the file.

DAS Administrator

As of 7.0.52 and greater, for new installs, you no longer need to create a DASADMIN user in JDE to access the Data Access Studio as an Administrator. The JDE user ID that was used to install DAS will automatically be designated to be the new DAS administrator. You can now assign other users to be a DAS Administrator as well by giving them the "DAS Administrator" permission under Work With Security.

Setting up DAS Automator

DAS allows authorized users to schedule reports to run on defined Automator servers. The output of these reports can be emailed, saved to the file system, or even saved to a database (via our mobie® product). Please verify that Excel is installed on the DAS web server.

1. Sign into DAS as DAS Administrator
2. Click Admin | Email Providers
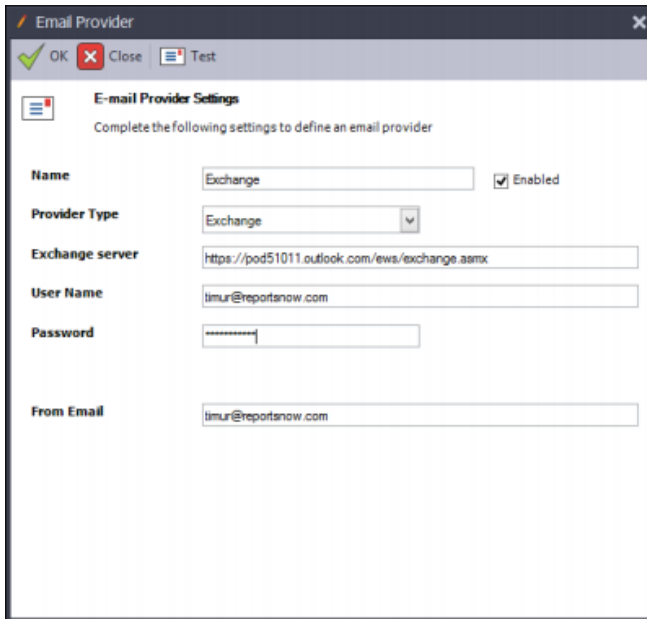3. Click **New Provider** and configure it to reference your email system.
   SMTP Example:

Exchange Example:

4. Click **Test Email**. This should send out a test email (to the email address listed in the 'From Email' field. If it is setup correct, it will bring up a dialog box saying it was successful sending the email.

5. Click OK | Save | Close

6. Click Admin | Automator to bring up the Automator Server control.

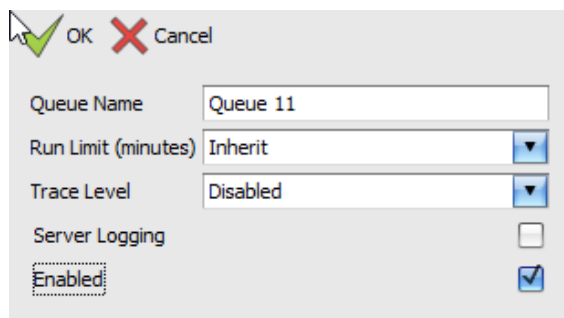7. Click 'Add Server'. This will bring up the Server Setup window.

    Server Name: Name of the server
    Network Address: Network identification of the server with the two '//' in front. Usually the same name as the server but can be an IP address.
    Run Limit: Inherit (uses the Run Limit specified in Global Settings).
    Check the **Enabled** box and click OK.

8. Click 'Add Queue' button.

9. Give a name for your Queue and check the Enabled box.

10. Click the 'Start' button under the Server section.

11. If you get any errors, try restarting the DAS Automator services in the Windows Services.

For more information on DAS administration, please review the Admin Guide on our support portal:

https://support.reportsnow.com/hc/en-us/articles