

Data Access Studio Install/Upgrade Guide for JDE EnterpriseOne

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Supported Versions

This Data Access Studio Manual provides comprehensive information for installing and licensing DAS. This manual describes downloading DAS from the [Download Center](#) of the ReportsNow website and installing it to your dedicated DAS server. These instructions apply to the following JDE E1 releases:

- XE
- ERP8
- E1 8.9
- E1 8.10
- E1 8.11
- E1 8.12
- E1 9.0
- E1 9.1
- E1 9.2+



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 EnterpriseOne:
 - Full EnterpriseOne client install Xe or higher
- 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



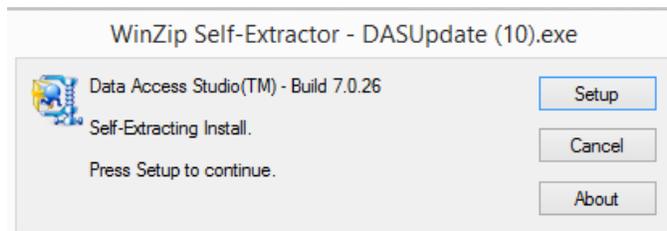
Downloading and Installing/Upgrading DAS

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.**

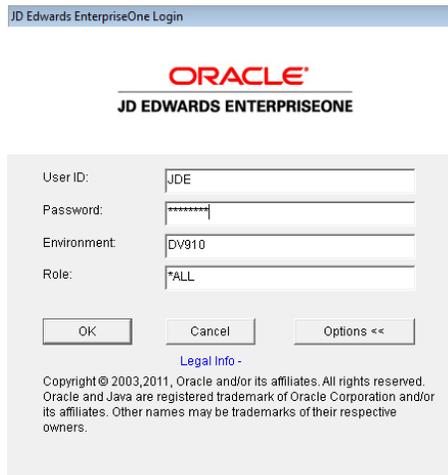
1. Download DASUpdate.exe from our [Download Center](#) to the DAS server.

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 mobile customer and have DAS mobile hosted on the same server as your DAS web server, please also download the MOBIPortal.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. Sign into JDE EnterpriseOne into a valid environment (e.g. DV910 or PD910).

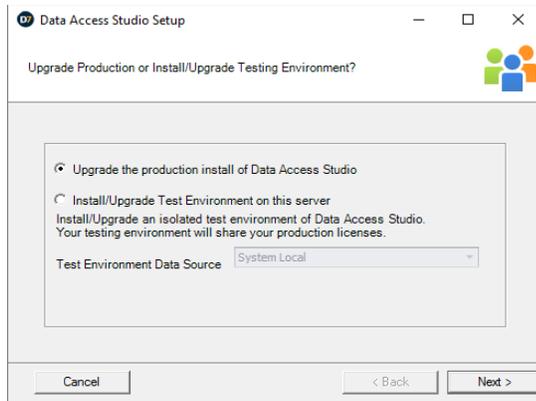


If you do not see the EnterpriseOne sign in, you either do not have the JDE E1 client installed or you are a World customer. Please refer to the Data Access Studio install guide for World customers.

4. Once you have signed in, you will see the welcome screen, click Next.



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

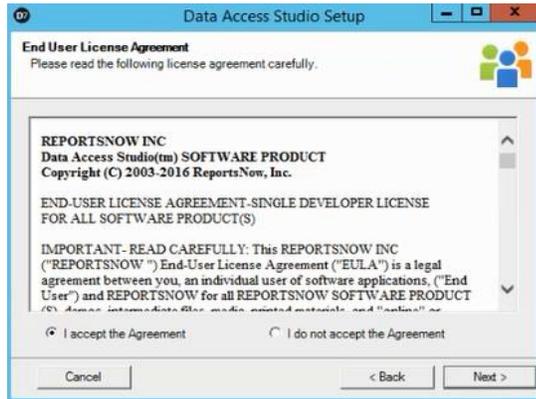


Please choose the first option (Upgrade the production install of DAS) and click Next. For more information on running it against a test environment, please review the following article:

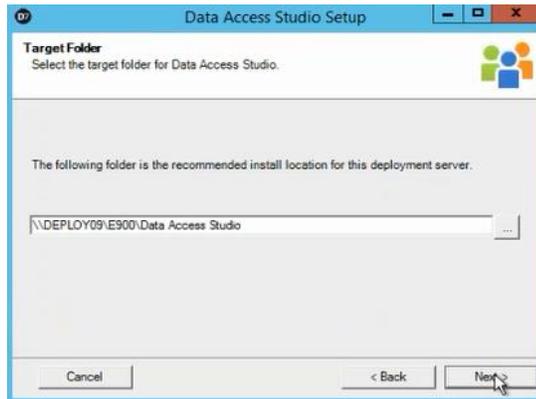
<https://support.reportsnow.com/hc/en-us/articles/218281578>



5. You should now see the license agreements screen. Please read the agreement, and if you accept the terms please click the “I Accept the Agreement” option and click Next.



6. The installer will automatically find the recommended target folder to copy the installation files to. This folder is the “Data Access Studio” located on your deployment server: e.g. (\\DEPLOY09\900\Data Access Studio). If you do not wish for Data Access Studio client installation files to be available on your deployment server, it is possible to simply point this to a directory on the server where you are installing DAS. Click Next to accept the default target folder.





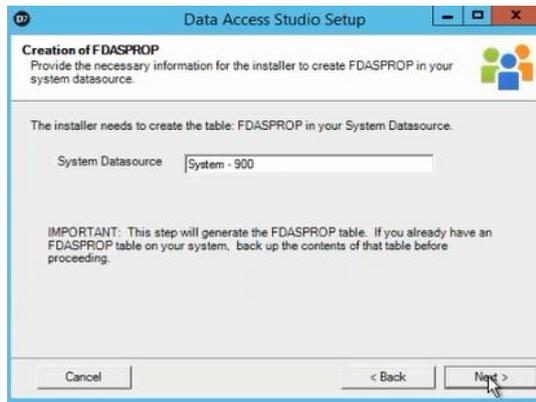
7. If this is the first time you are installing Data Access Studio, you need to provide the database user and password to generate the “FDASPROP” table in your system data source. The installer populates the data source field with the recommend data source.

If you are applying an update/upgrade, the installer will skip this screen as it will detect that this table already exists.

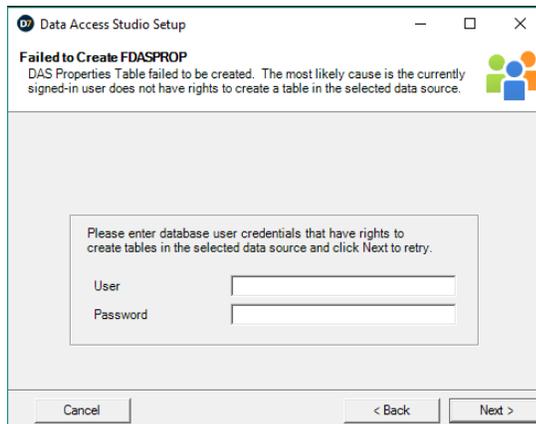
This table is the main storage table for Data Access Studio. This is the table where DAS stores layouts, published reports, user preferences etc. DASUpdate.exe creates this table in your system data source to ensure that DAS users have access to FDASPROP no matter which environment they sign in to.

Because there is only one FDASPROP table for your entire enterprise, you do not have to worry about environments promotion (e.g. DV->PY->PD). After the DASUpdate.exe creates FDASPROP, it then creates an OCM mapping for FDASPROP. This way DAS will always know where FDASPROP is located regardless of the signed-in environment.

Once you have filled in all the fields, press Next and review the install summary.



NOTE: In order to generate this table in your system data source, you MUST have developer rights to create tables in the data source. This would typically require a CNC 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:





8. Once you have created the FDASPROP table, 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 E1 Full 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.
 - **JDE E1 Workstation** - Your users already have a JDE E1 Full client install. The user will install the DAS client to their workstation. Once installed, DAS runs entirely from the user's workstation consuming resources only from the workstation and the database



Please pick your deployment option and go to that section.

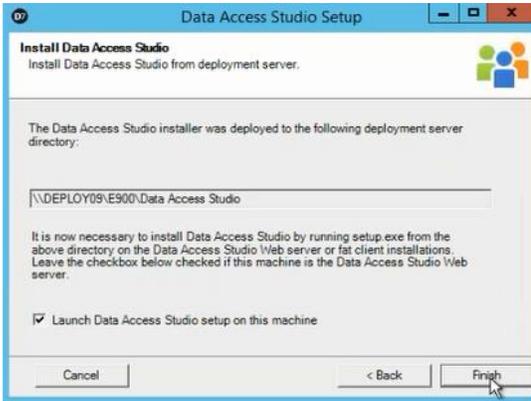


Web Install Procedure

Use Web Server configuration to deploy Data Access Studio across a Wide Area Network. This configuration is most generic way to deploy DAS as it will work within your LAN and in your WAN. ReportsNow recommends that you use a dedicated machine to host Data Access Studio.

IMPORTANT! Do not use your deployment server as the DAS Web server. The DAS Web Server should be in close network proximity to the E1 database.

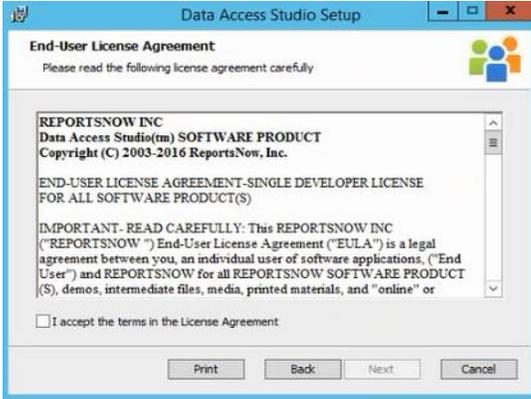
1. Once you click on Next at the install summary window, you will see this window. Click Finish.



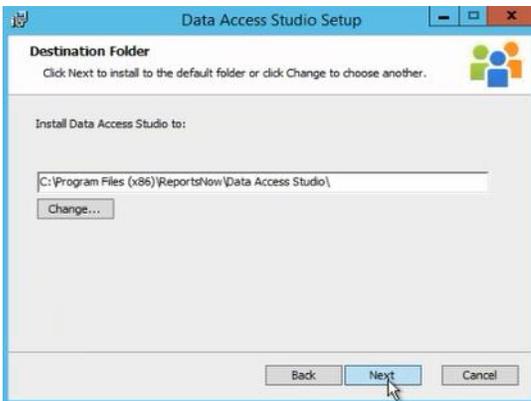
2. After you click Finish, setup will present the installer welcome screen. Click Next.



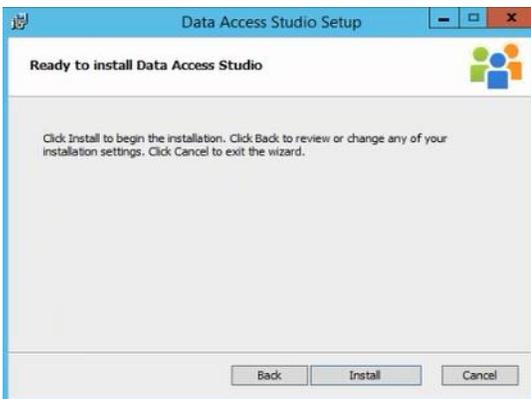
3. Accept the license agreement term and click Next.



4. Pick the default location the installer provides and click Next.



5. Click "Install" to begin the installation.





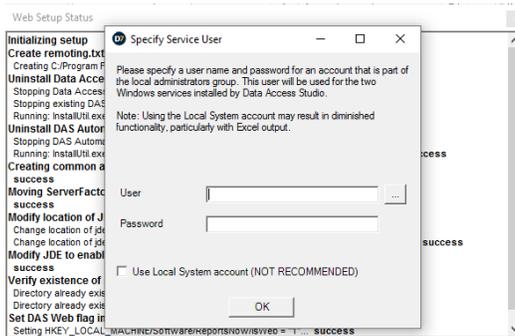
Fill in the fields as follows or accept the defaults and click **Setup Web**.

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 <u>this port is open.</u>
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 <u>sure the range of Start Port to Start Port + Maximum Connections is open.</u> The <u>default setting is 20.</u> Please increase to the <u>number of licenses you purchased.</u>
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 <u>the corresponding server executable gets cleaned up.</u> Using the default timeout is <u>recommended.</u> IMPORTANT! If your clients <u>experience timeouts when running DAS,</u> <u>try increasing the value of this parameter.</u>
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 <u>default timeout is recommended.</u>
Idle Timeout	Version 4.9 and higher. If set to a non-zero amount, this will set the number of <u>minutes</u> 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 <u>Web Server.</u> Any DAS client that is connected to the existing Web server will be <u>disconnected.</u>
Mixed-case password	Check this box if you are using LDAP security or other login authentication that <u>accepts passwords that are not all uppercase.</u>

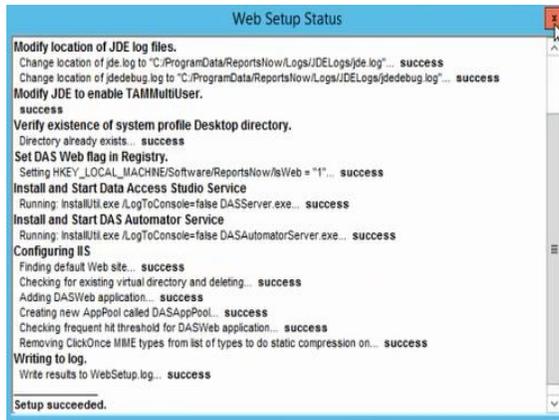


- You will be prompted with the following window. We recommend changing the service accounts from Local System to an account that is a member of the machine's built in Administrators group.

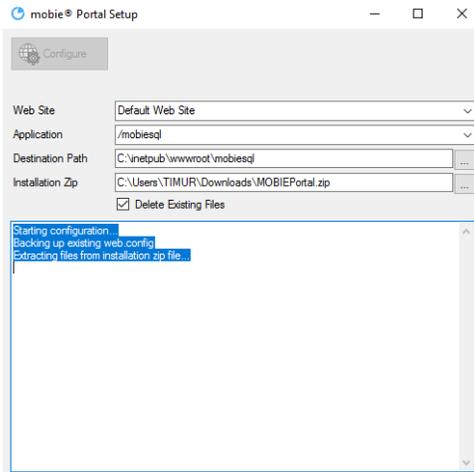
Note: If this is an upgrade, you will not be prompted for this. It will continue to use the service account that it was running under.



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



NOTE (Upgrades only): If you are a DAS mobile 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 mobile 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

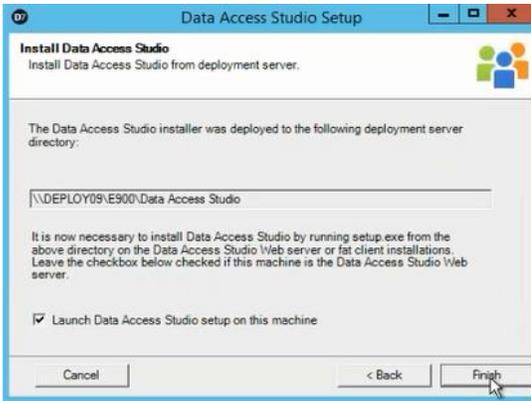
There are two primary variations on how to install DAS in a Citrix environment:

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 procedure:

Perform the Citrix install for each server that you want DAS. The Citrix server must have a full JDE E1 client install.

1. Once you click on Next at the install summary window, you will see this window. Uncheck the Launch Data Access Studio setup on this machine option.



2. From your Citrix server, copy the contents of the Data Access Studio folder on your deployment server to a local folder on the Citrix server. In the example above, you would copy the contents of \\JDEPLOY09\E900\Data Access Studio to a local folder. To install DAS, go to Add | Remove Programs and select the setup.exe in the local folder you copied the contents to. If you are on Windows Server 2008, you can go to the command prompt and type chguser /install and then go directly to the local folder and double click on setup.exe without having to do it from Add | Remove Programs.



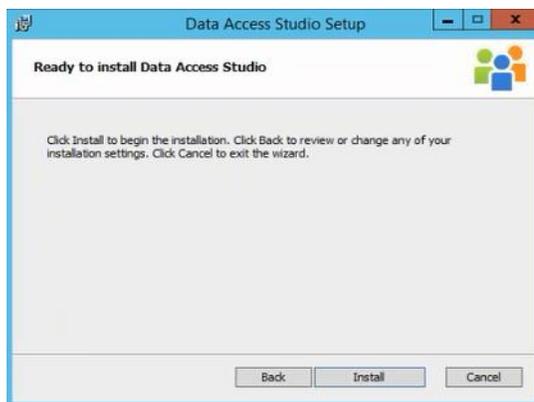
3. Accept the license agreement term and click Next.

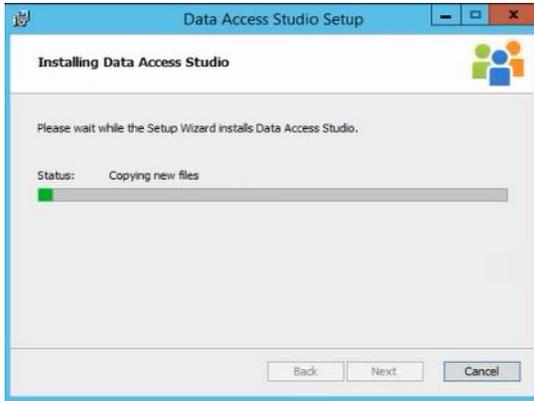


4. Pick the default location the installer provides and click Next.



5. Click "Install" to begin the installation.





6. Once the installation is complete, click “Finish”.



You can now publish Data Access Studio to your 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 use the installation files that by default would have been copied to your deployment server during the installation on the DAS Web server. The default location for these installation



files would typically be something like \\<Deployment Server>\E920\Data Access Studio and the files are called setup.exe and DAS.msi. Copy these files to a location on your Citrix server.

Use standard Citrix installation mechanisms to install the DAS client using setup.exe (using “chguser /install” or the Add/Remove Programs dialog).

Lastly, copy the file called Remoting.txt that can be found in the DAS installation directory on your DAS Web server (typically C:\Program Files (x86)\ReportsNow\Data Access Studio\Remoting.txt) and copy it to the DAS installation directory 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.

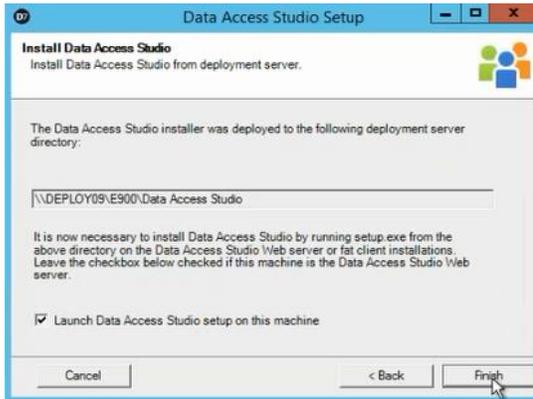
Note: that some users opt to simply copy the complete DAS Web server’s installation directory to a known, stable location on the Citrix server rather than use the setup.exe installer. This mechanism also works fine, though DAS will then not appear with its current version number as an installed application on the Citrix server.



JDE E1 Workstation Install Procedure

Perform this installation if you use JDE E1 in the full client mode -- i.e. you have a full JDE E1 client install on your workstation.

1. Once you click on Next at the install summary window, you will see this window. Click Finish.



2. After you click Finish, setup will present the installer welcome screen. Click Next.



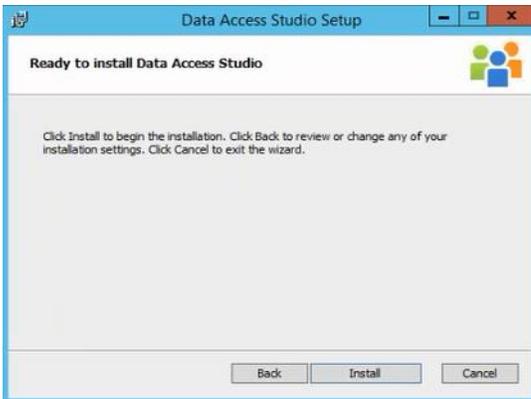
3. Accept the license agreement term and click Next.

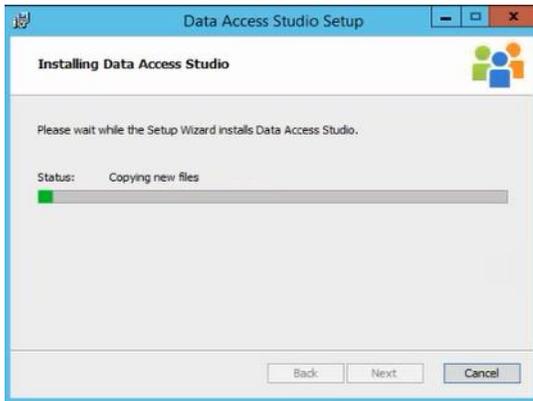


4. Pick the default location the installer provides and click Next.



5. Click "Install" to begin the installation.





6. Once the installation is complete, click "Finish".



7. To run DAS, double click on the Data Access Studio icon on your desktop and use your JDE credentials to sign in.



Requesting and Importing License Key

1. Sign in to Data Access Studio

EnterpriseOne Log In

ReportsNow

ReportsNow Server EVORA-PC

User: JDEUSERID

Password: *****

Environment: JPD900

Role: *ALL

OK Cancel

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

License Form

User may not sign in with currently applied licenses.
Contact your company's Data Access Studio administrator for assistance.

Please press "Request License" to request a license file. If you have a license file, press "Import License" to activate Data Access Studio.

support@ReportsNow.com

Request License Import License Cancel

- a. Click on Request License.

License Generation Info

Copy and Paste the information below and email to:
support@ReportsNow.com

User = [redacted]
Machine = [redacted]
Date = 04/21/2016
Time = 103513
Deployment Server = [redacted]
Version = 7.0.27.0
Recommended License Type: CL
Reason for request: No valid license found

- 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 *mobile*® product). Please verify that Excel is installed on the DAS web server.

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

SMTP Example:

The screenshot shows the 'Email Provider' dialog box with the following settings:

- Name: Office365 Enabled
- Provider Type: Mail
- Outgoing mail address (SMTP): pod1234567@outlook.com
- User Name: me@myDomain.com
- Password: [masked]
- Port: 25
- From Email: me@myDomain.com
- Enable SSL
- SSL Mode: Implicit
- SSL Port: 587

Exchange Example:

The screenshot shows the 'Email Provider' dialog box with the following settings:

- Name: Exchange Enabled
- Provider Type: Exchange
- Exchange server: https://pod51011.outlook.com/ews/exchange.asmx
- User Name: timur@reportsnow.com
- Password: [masked]
- From Email: timur@reportsnow.com



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.

The screenshot shows a dialog box with the following fields and controls:

- Buttons: OK (with a green checkmark icon), Cancel (with a red X icon)
- Queue Name: Text input field containing "Queue 11"
- Run Limit (minutes): Dropdown menu set to "Inherit"
- Trace Level: Dropdown menu set to "Disabled"
- Server Logging: Unchecked checkbox
- Enabled: Checked checkbox

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>