

WhereScape®

# WhereScape® Product Suite

## Installation and Configuration Manual

Version 8.3.1.1 | March 2019

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## About this Document

The purpose of this document is to provide user level instructions on how to install and configure WhereScape Metdata Server and WhereScape 3D.

## Audience

This document is aimed at WhereScape clients, WhereScape Sales Team, WhereScape Consultants and WhereScape Internal Staff.

## Assumptions

It is assumed the reader is familiar with the following:

- Is computer literate and familiar with Microsoft Windows and Mac operating system.
- WhereScape 3D will be used by experienced data warehouse designers and implementers.

## Disclaimer

### Note

The software described in this guide is furnished under a license agreement and may be used only in accordance with the terms of the agreement.

### Note

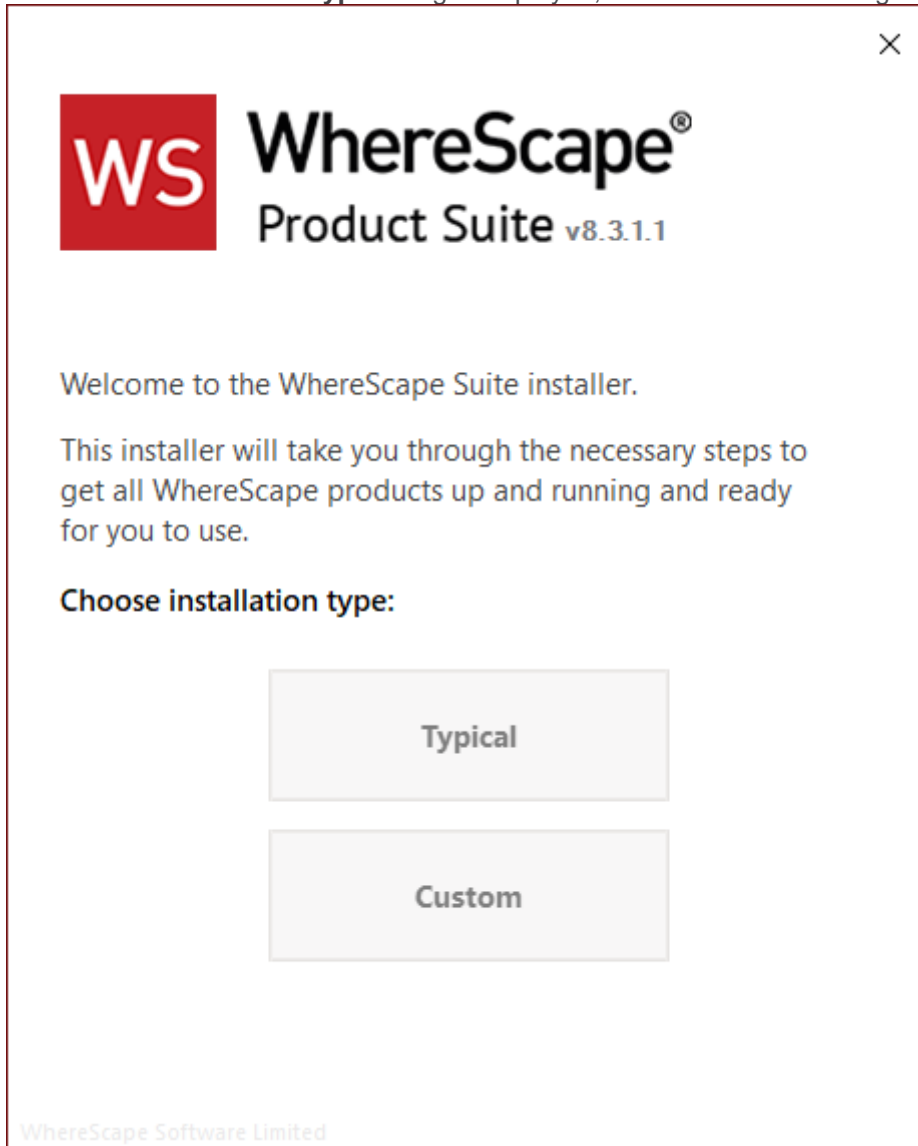
The screenshots and presentations shown are intended as examples only, and may differ from the actual screenshots and presentations generated by the released product in commercial production.

## Installing WhereScape Product Suite

To install WhereScape 3D and the WhereScape Metadata Server:

1. Download **3D\_8311.exe** from the WhereScape website.
2. Run the installer.

The **Choose installation type** dialog is displayed, as show in the following screenshot:



- **Typical** – If you select the **Typical** option, WhereScape Product Suite will be installed with all mandatory, and recommended configurations supplied with the installer.
- **Custom** - If you select the **Custom** option, you will be provided with screens where you specify all configuration information.

## WhereScape Product Suite Typical Installation

1. Select the **Typical** installation type button.  
The **Select product to install** dialog is displayed, as show in the following screenshot:

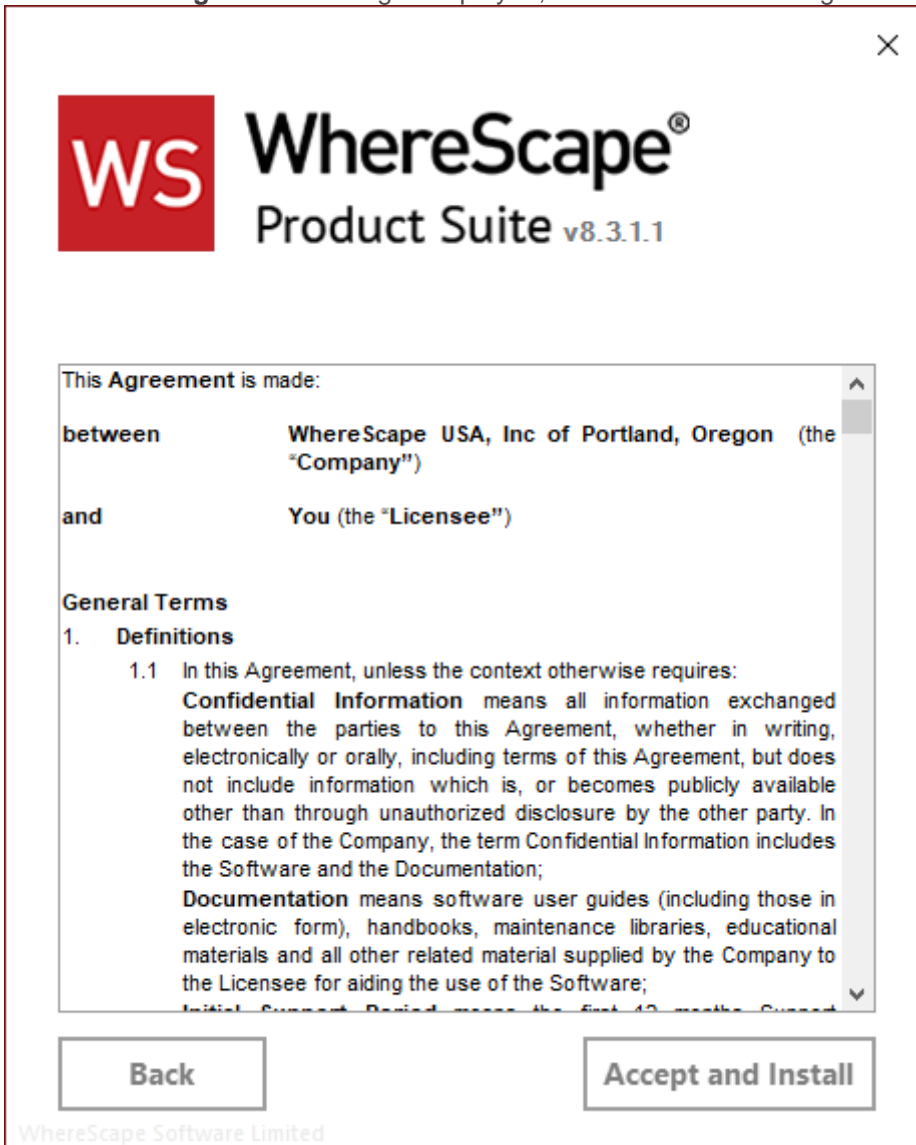


2. Select checkboxes for the products you want to install.

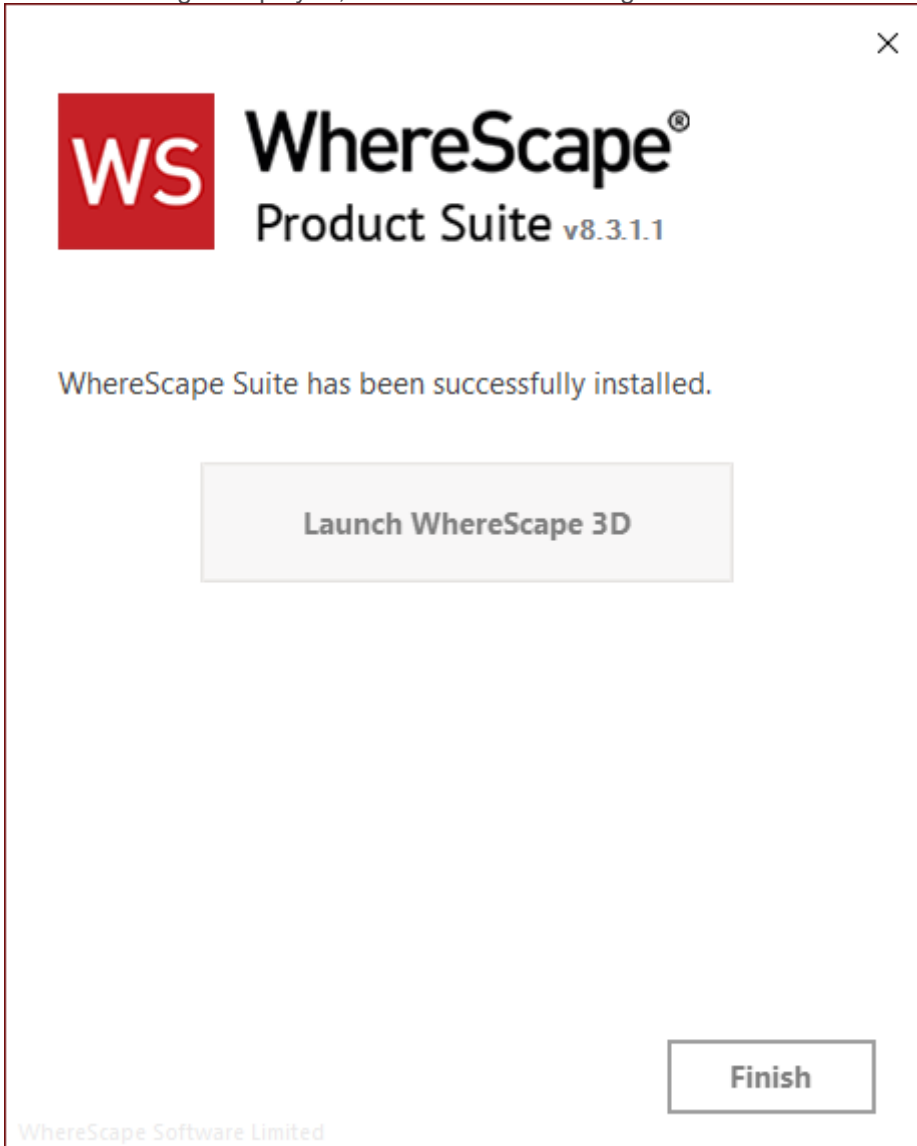
### Note

WhereScape Metadata Server is required to run WhereScape 3D.

3. Click the **Next** button.  
The **License-Agreement** dialog is displayed, as show in the following screenshot:



4. Read the license information and click the **Accept and Install** button. The **Setup** dialog is displayed. The installation process will take several minutes. Once the installation is complete, the **Successfully installed** dialog is displayed, as show in the following screenshot:



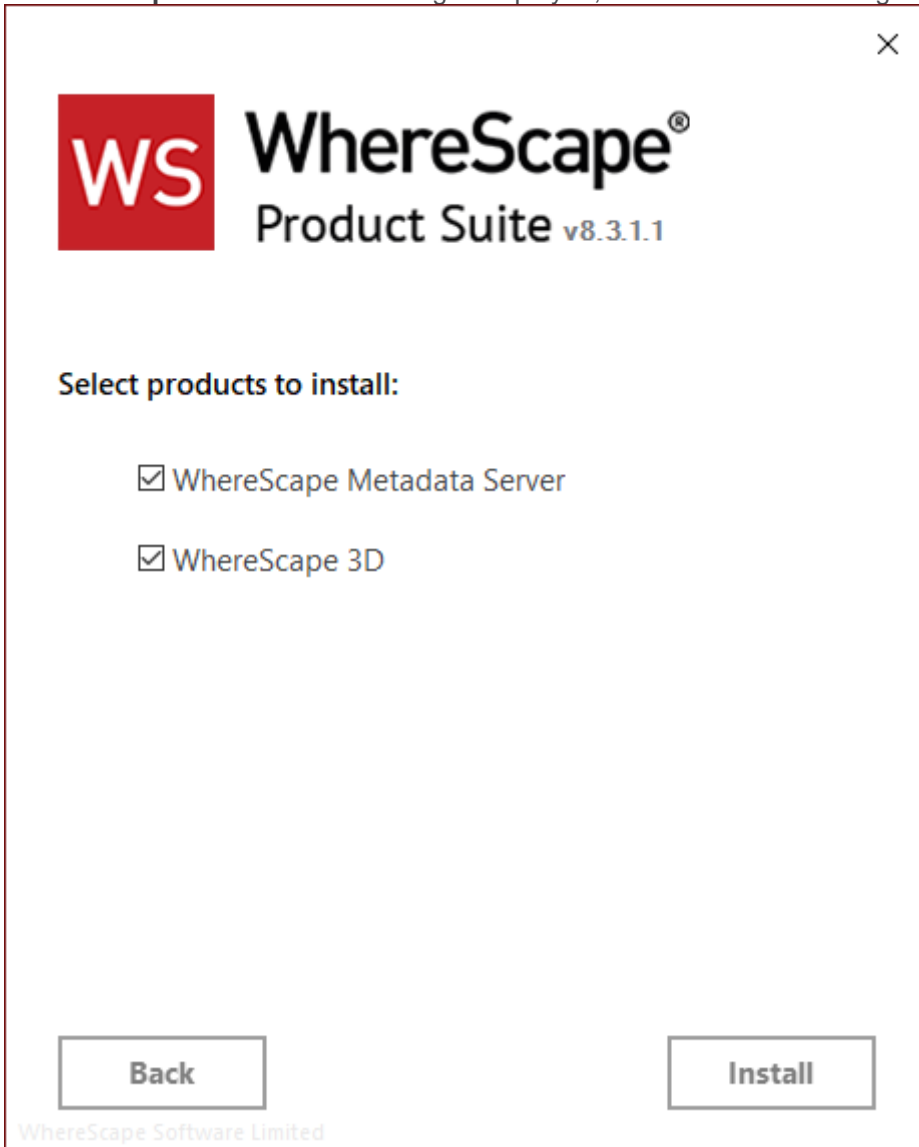
5. Complete one of the following...
- Click the **Launch WhereScape 3D** button to launch 3D.
  - Click the **Finish** button to exit the Wizard.

## WhereScape Product Suite Custom Installation

To install WhereScape 3D and the WhereScape Metadata Server:

1. Select the **Custom** installation type button.

The **Select product to install** dialog is displayed, as show in the following screenshot:



2. Select the checkboxes for the products you want to install.

### Note

WhereScape Metadata Server is required to run WhereScape 3D.

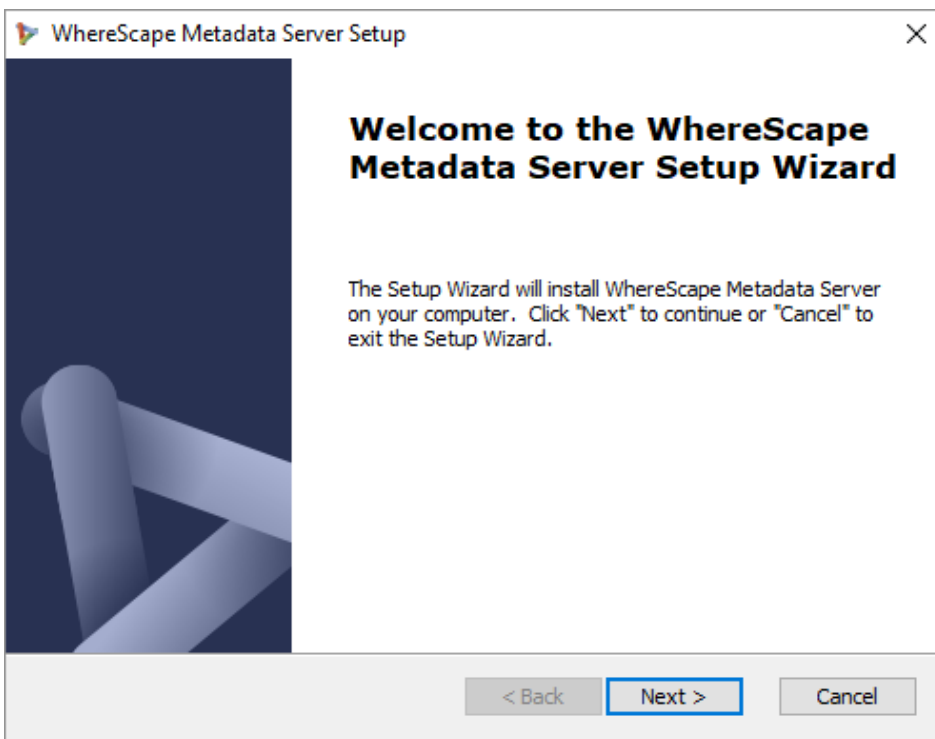
3. Click the **Install** button.  
The **Setup** dialog is displayed.

After the extraction process is completed, the next step is to install and configure the products you selected.

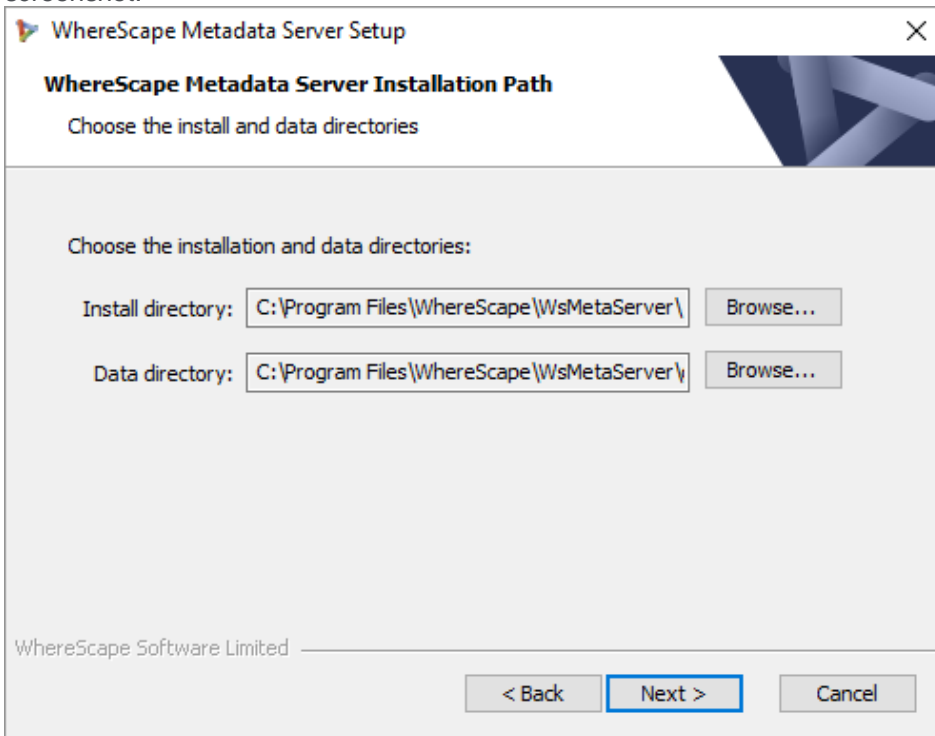


## Installing and Configuring WhereScape Metadata Server

1. At the end of the extraction process, the **WhereScape Metadata Server Setup** wizard is displayed, as shown in the following screenshot:



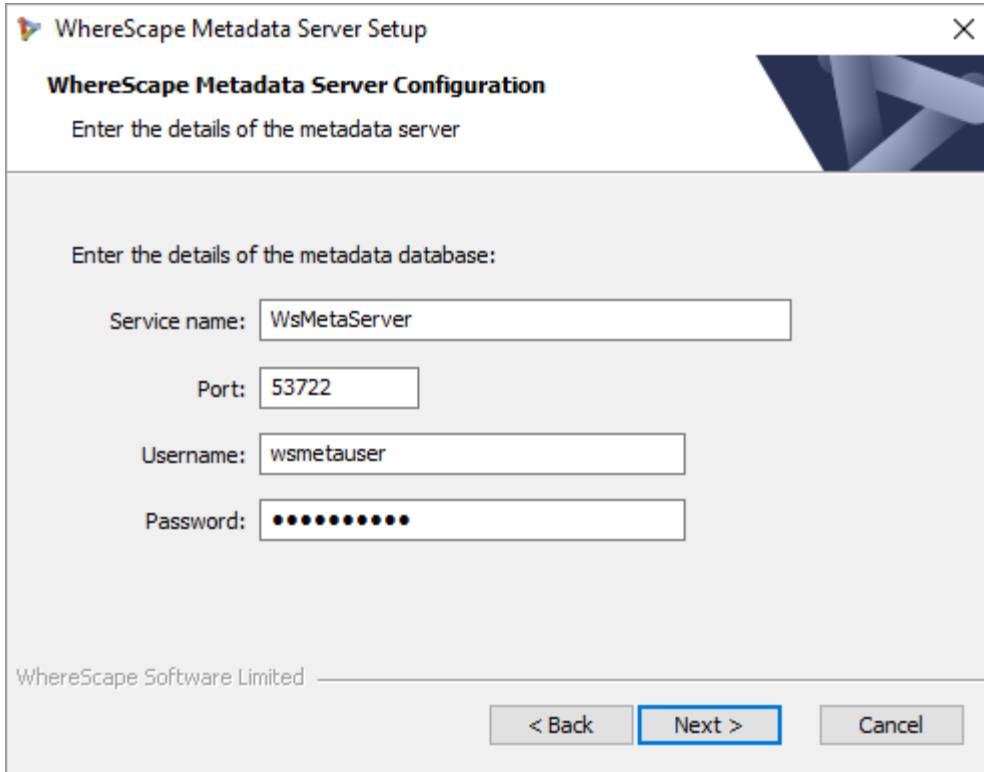
2. Click **Next**.  
The **WhereScape Metadata Server Installation Path** screen is displayed, as shown in the following screenshot:



3. On the **Installation Path** screen...

- Confirm the **Install directory** and **Data directory** for the WhereScape Metadata Server.
- Click **Next**.

The **WhereScape Metadata Server Configuration** screen is displayed, as shown in the following screenshot:



The screenshot shows a window titled "WhereScape Metadata Server Setup" with a close button (X) in the top right corner. The main heading is "WhereScape Metadata Server Configuration" followed by the instruction "Enter the details of the metadata server". Below this, there is a section titled "Enter the details of the metadata database:" with four input fields: "Service name:" containing "WsMetaServer", "Port:" containing "53722", "Username:" containing "wsmetauser", and "Password:" containing ten black dots. At the bottom left, it says "WhereScape Software Limited". At the bottom right, there are three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel".

4. On the **WhereScape Metadata Server Configuration** screen, complete the following...

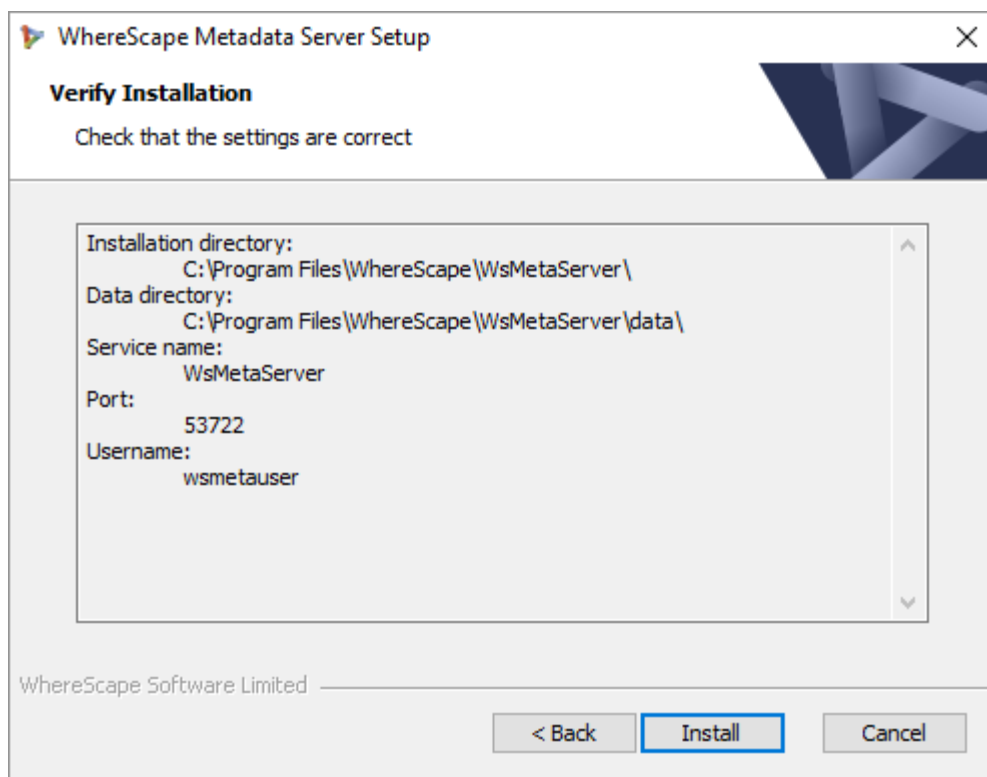
- Enter a **Service name** for the metadata database. Default is **WsMetaServer**.
- Enter a **Port** number. Default is **53722**.
- Enter a **Username** of the metadata database. Default is **wsmetauser**.

**Tip**

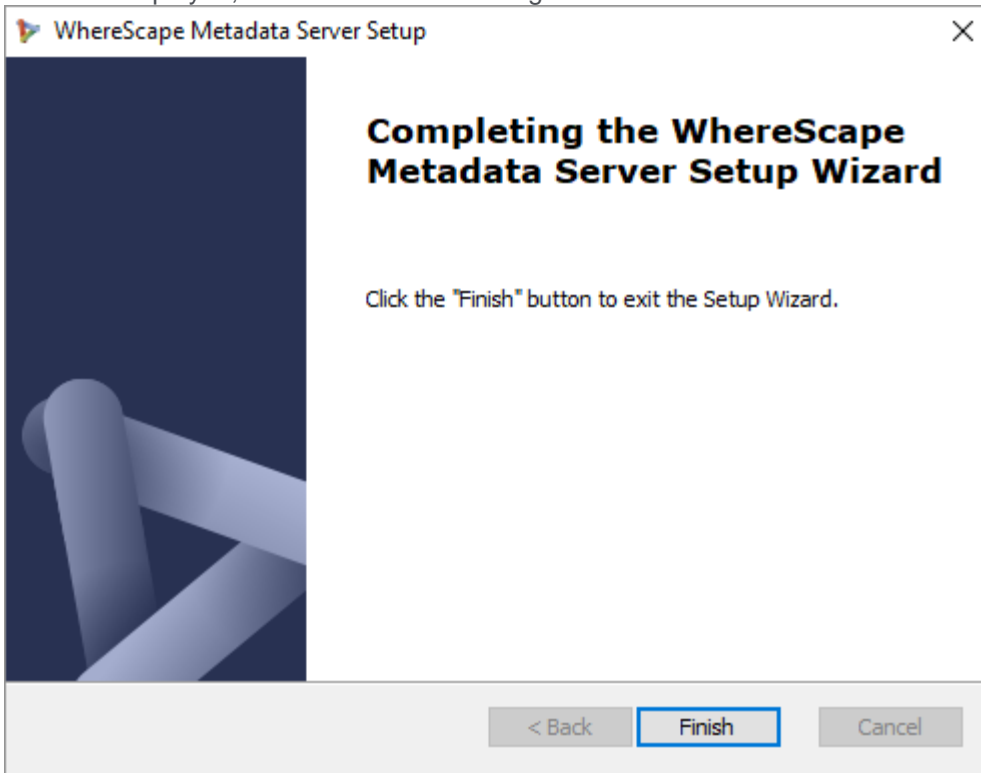
The **Username** specified is referred to as the superuser details in WhereScape products .

- Enter a **Password** of the metadata database. Default is **wsmetauser**.
- Click **Next**.

The **Verify Installation** screen is displayed, as shown in the following screenshot:



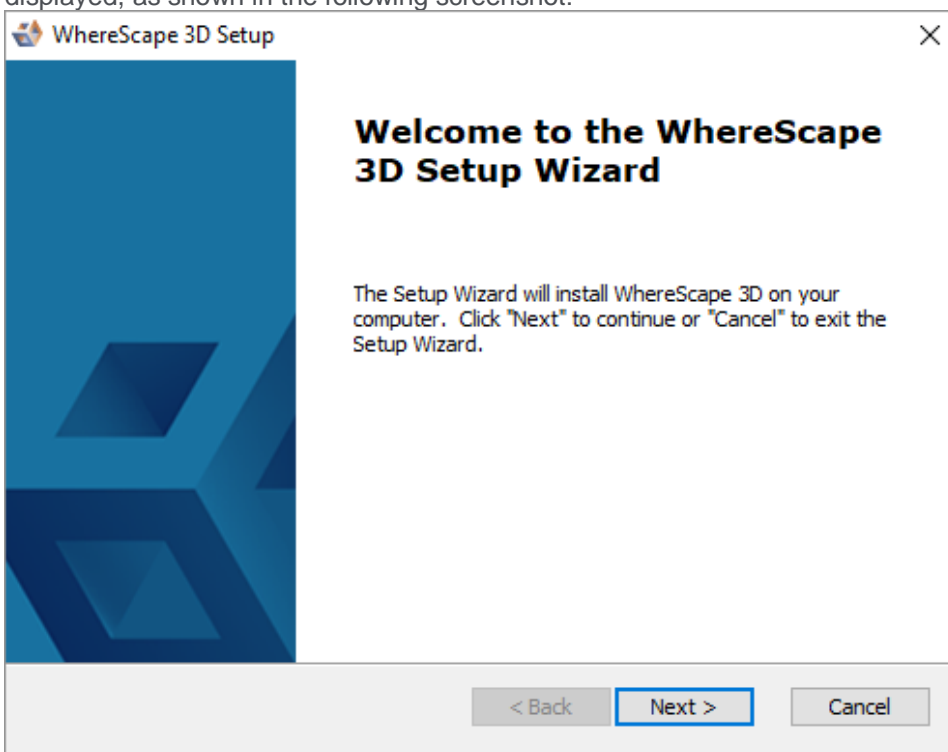
- Click **Install**. The installation may take several minutes. Once the installation is complete, the **Completing the WhereScape Metadata Server Setup Wizard** screen is displayed, as shown in the following screenshot:



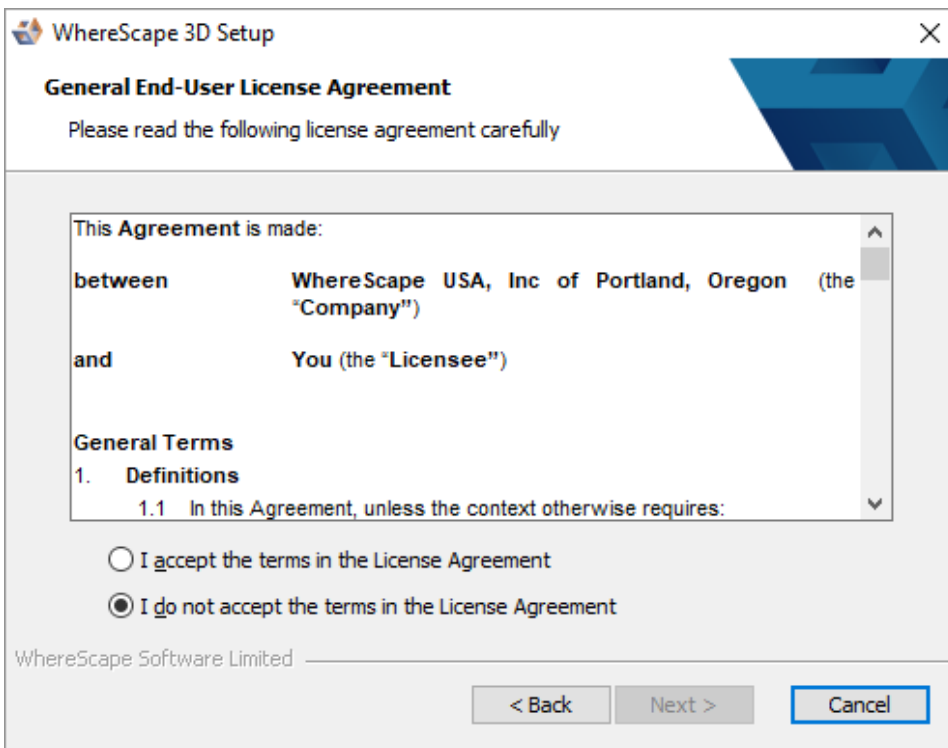
- Click **Finish**.

## Installing and Configuring WhereScape 3D

1. After installing and configuring WhereScape Metadata Server, the **WhereScape 3D Setup** wizard is displayed, as shown in the following screenshot:

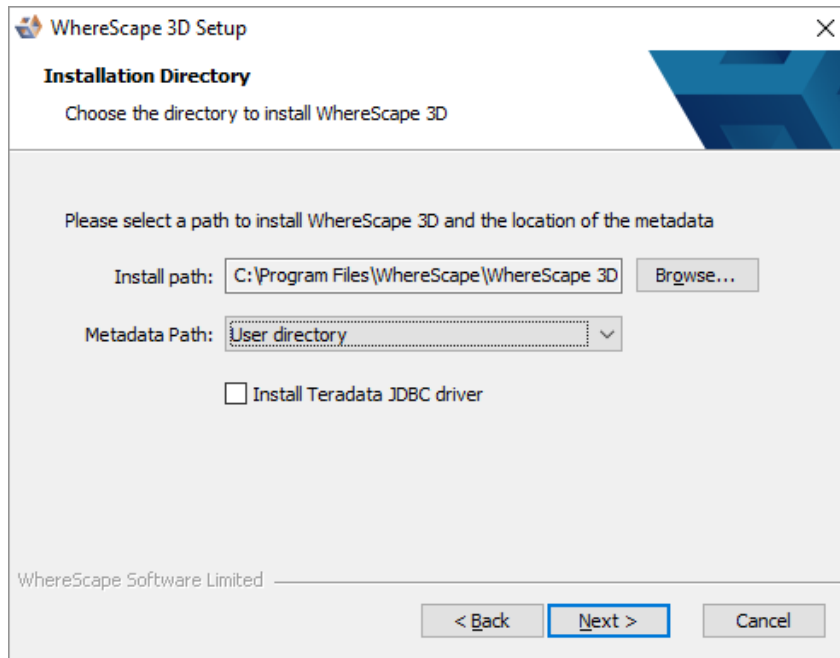


2. On the welcome screen, click **Next** to continue. The **General End-User License Agreement** screen is displayed, as shown in the following screenshot:



3. Read the license agreement, select the **I accept the terms in the License Agreement** radio button and click **Next**.

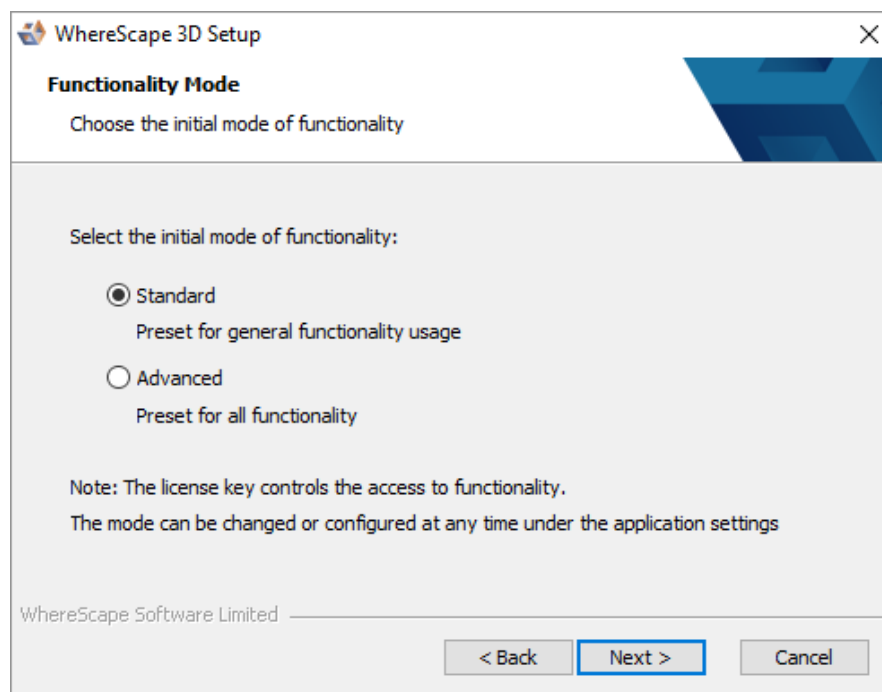
The **Installation Directory** screen is displayed, as shown in the following screenshot:



4. On the **Installation Directory** screen...

- Confirm the directory to install 3D.
- Select a **Metadata Path** from the drop-down list
- Select the **Install Teradata JDBC driver** checkbox if you want to install it.
- Click **Next**.

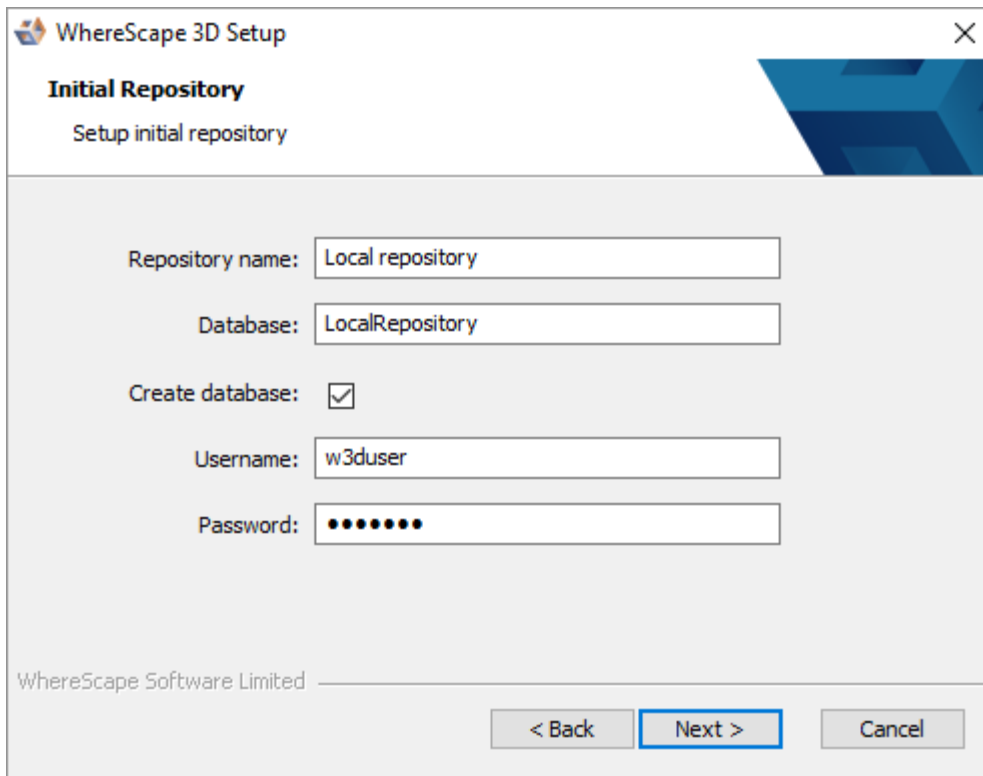
The **Functionality Mode** screen is displayed, as shown in the following screenshot:



5. On the **Functionality Mode** screen, select the initial mode of functionality and click **Next**. The **Initial Repository** screen is displayed, as shown in the following screenshot...

**Note**

The **Initial Repository** screen is only displayed if the WhereScape Metadata Server has been installed on the same machine.



The screenshot shows a window titled "WhereScape 3D Setup" with a close button (X) in the top right corner. The window content is as follows:

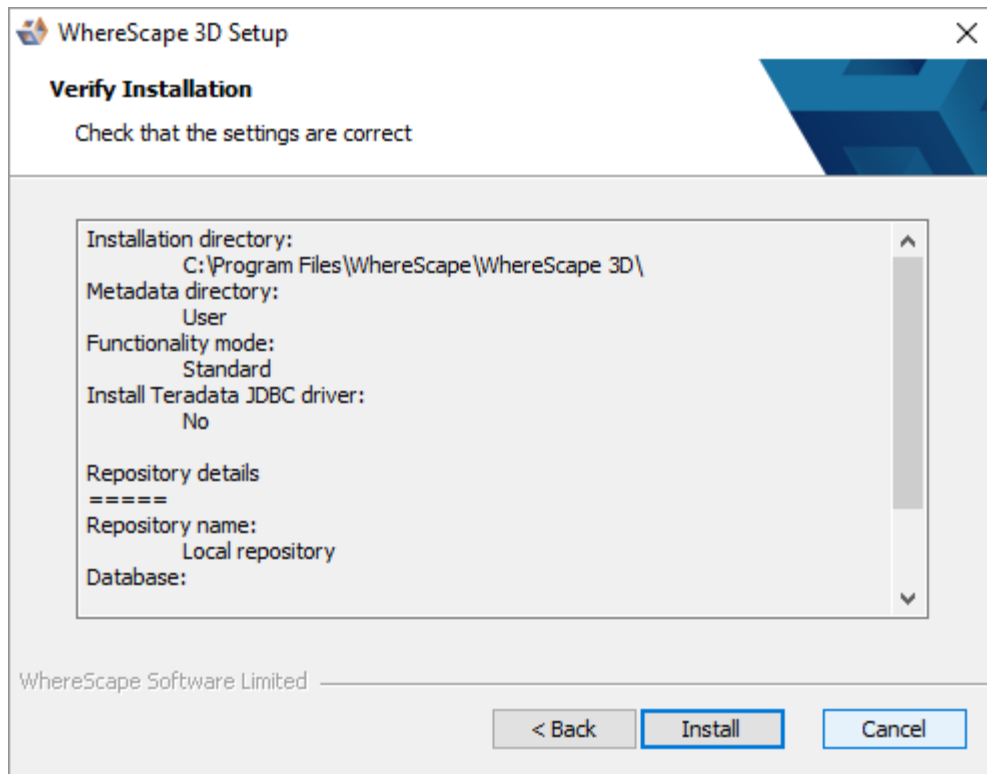
- Initial Repository**  
Setup initial repository
- Repository name:
- Database:
- Create database:
- Username:
- Password:

At the bottom left, it says "WhereScape Software Limited". At the bottom right, there are three buttons: "< Back", "Next >" (highlighted with a blue border), and "Cancel".

6. On the **Initial Repository** screen...

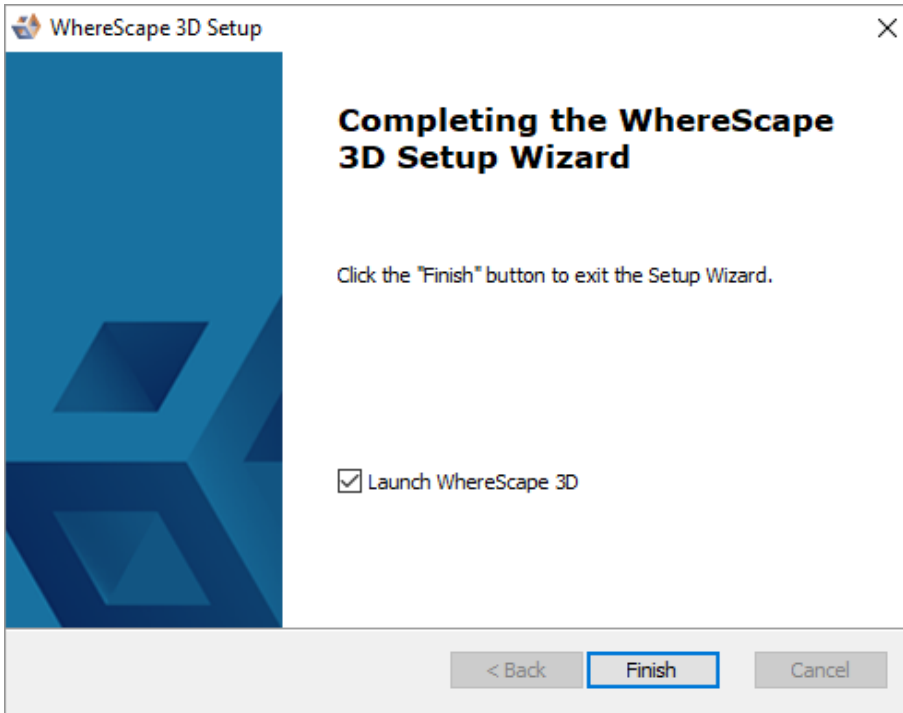
- Enter a **Repository** name.
- Enter the name of the **Database**.
- Select the **Create database** checkbox to create a new database or use the existing database.
- Enter a **Username** to access the database. Default is **w3duser**. A new username will be created if it does not already exist when creating a database.
- Enter a **Password** to access the database. Default is **w3duser**.
- Click **Next**.

The Verify Installation screen is displayed, as shown in the following screenshot:

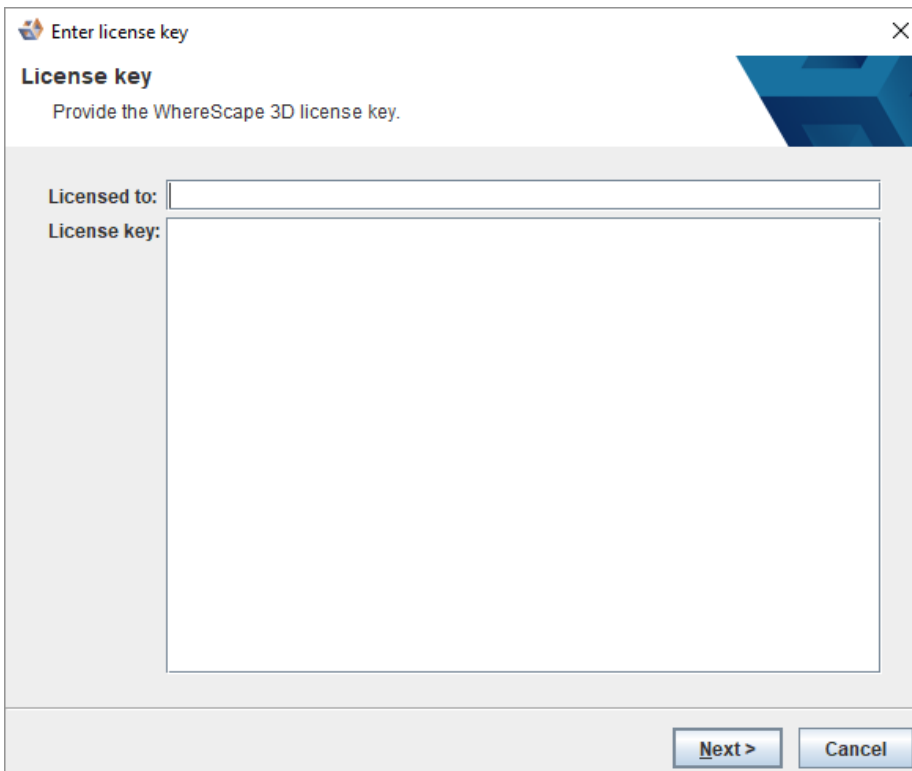




- Click **Install**. The installation may take several minutes. Once the installation is complete, the **Completing the WhereScape 3D Setup Wizard** screen is displayed, as shown in the following screenshot:



- Click **Finish**. The **WhereScape 3D** application is displayed (only if the Launch WhereScape 3D checkbox is selected in the previous screen) and you will be asked to enter your **License key** information.



9. Enter the **Licensed to** user name, the **License key** and click **Next**.  
The **License Agreement** screen is displayed, as shown in the following screenshot:

**Enter license key** [Close]

### License Agreement

The WhereScape 3D License Agreement.

Please read the following license agreement. You must accept the terms of this agreement before continuing the wizard.

Licensed to: Hetal Shah  
Components: Basic, Conversions, Collaboration, Generation, RED integration  
Expiry date: Unrestricted  
Licensed users: 1  
Restriction: WhereScape staff use only

This Agreement is made:  
between **WhereScape USA, Inc of Portland, Oregon (the Company)**  
and **You (the Licensee)**

1. **Definitions**

I accept the agreement Open in external application

I do not accept the agreement

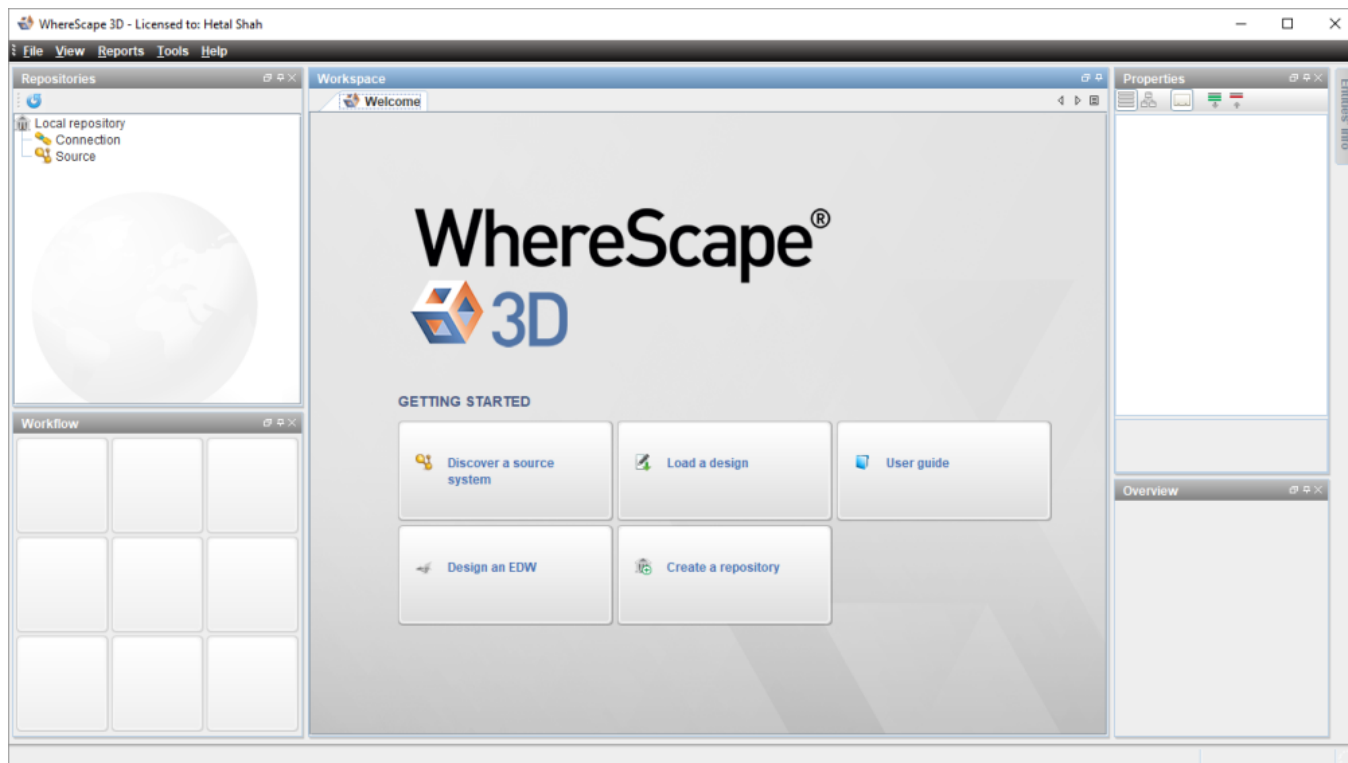
Finish Cancel

10. Read the License Agreement, select the **I accept the agreement** radio button and click **Next** or **Finish**.

#### Tip

- You can also click **Open in external application** to view the license agreement for Teradata JDBC Driver. Read the License Agreement and complete one of the following:
  - Select the **I accept the agreement** radio button and click **Next**.
  - OR
  - Select the **I reject the agreement and do not wish to install the driver** radio button and click **Next**.

The **WhereScape 3D Welcome** screen is displayed.



## Installing WhereScape Product Suite using Command Line Options

WhereScape Product Suite can be installed using the command line:

```
3D_8311.exe /quiet
```

The installation can be controlled by providing parameters to the installer:

```
3D_8311.exe /quiet META_DB_SERVICE="MyWsMetaServer"
```

The installation can also be provided with a file of all the parameters:

```
3D_8311.exe /quiet OPTIONS=<path\to\file>
```

## Options:

```

; =====
; WhereScape Software Limited
; Suite installer options file
; =====
; Any enabled values found in this file will override any specified values over the command
line arguments
;
; Remove ';' to uncomment
;
; Note:
; Key and value must all be on the same line
; Environment variables must be system wide
;
; Examples:
; > 3D_8311.exe /quiet /L*vx ws.log OPTIONS="<absolute\path\to\options\file>"
;
; > SET pwinstaller="META_DB_PASS=<pass1> MDDB_PASS=<pass2>"
; > 3D_8311.exe /quiet /L*vx ws.log OPTIONS="<absolute\path\to\options\file>" %pwinstaller%
; =====
; Metadata Server options
; =====
; MDDB_ENABLE="YES"
; META_DB_INSTALL_DIR="C:\Program Files\WhereScape\WsMetaServer"
; META_DB_DATA_DIR="C:\Program Files\WhereScape\WsMetaServer\data"
; META_DB_SERVICE="WsMetaServer"
; META_DB_PORT=53722
; META_DB_USER="wsmetauser"
; META_DB_PASS="wsmetauser"
; META_LOG="%TEMP%\ws_mddb.log"
; =====
; ODBC options
; =====
; ODBC_ENABLE="YES"
; LOGODBC="%TEMP%\ws_odbc.log"
; =====
; WhereScape 3D options
; =====
; W3D_ENABLE="YES"
; DIR3D="C:\Program Files\WhereScape\WhereScape 3D"
; KEY3D="<key>"
; DRIVE="C:\"
; TERADATA="FALSE"
; ADVANCED="FALSE"
; MDDB_REPO="Local repository"
; MDDB_DATABASE="LocalRepository"
; MDDB_CREATE_DB="YES"
; MDDB_USER="w3duser"
; MDDB_PASS="w3duser"
; LOG3D="%TEMP%\ws_w3d.log"

```

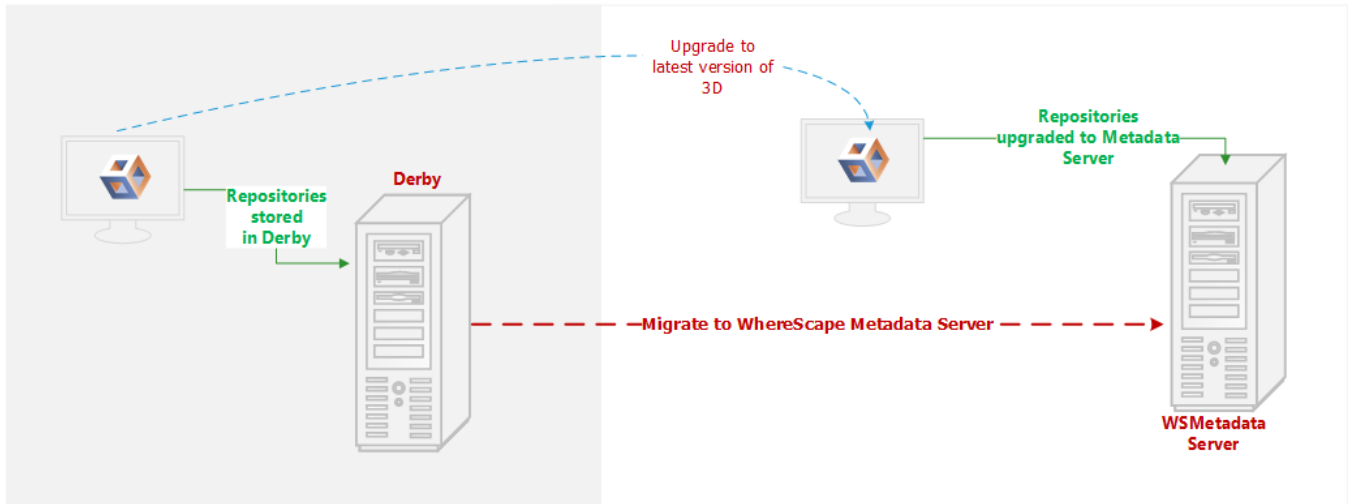
## Upgrading to the Latest Version of 3D

### Overview

Following is an overview of upgrading local repositories...

#### WhereScape 3D 8.2.1.1 and below

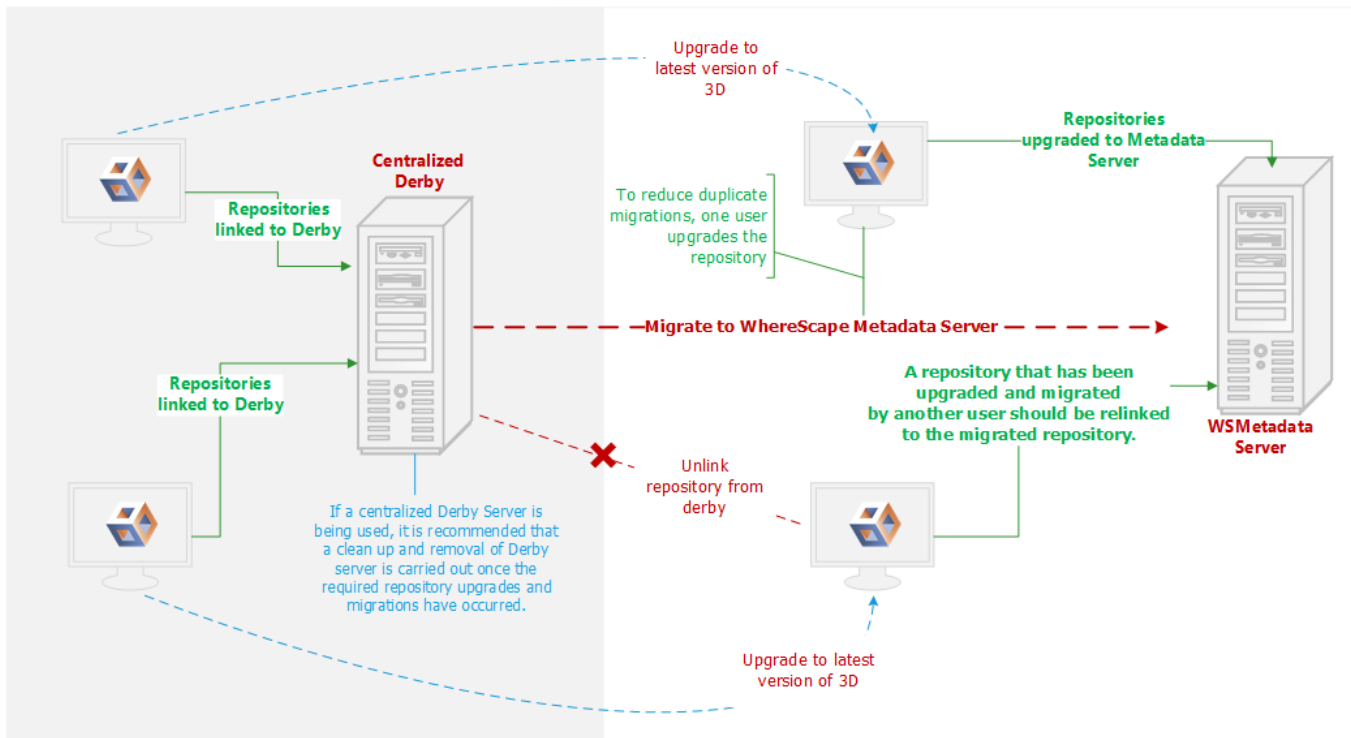
#### WhereScape 3D 8.3.1.0 and onwards



Following is an overview upgrading centralized repositories...

#### WhereScape 3D 8.2.1.1 and below

#### WhereScape 3D 8.3.1.0 and onwards



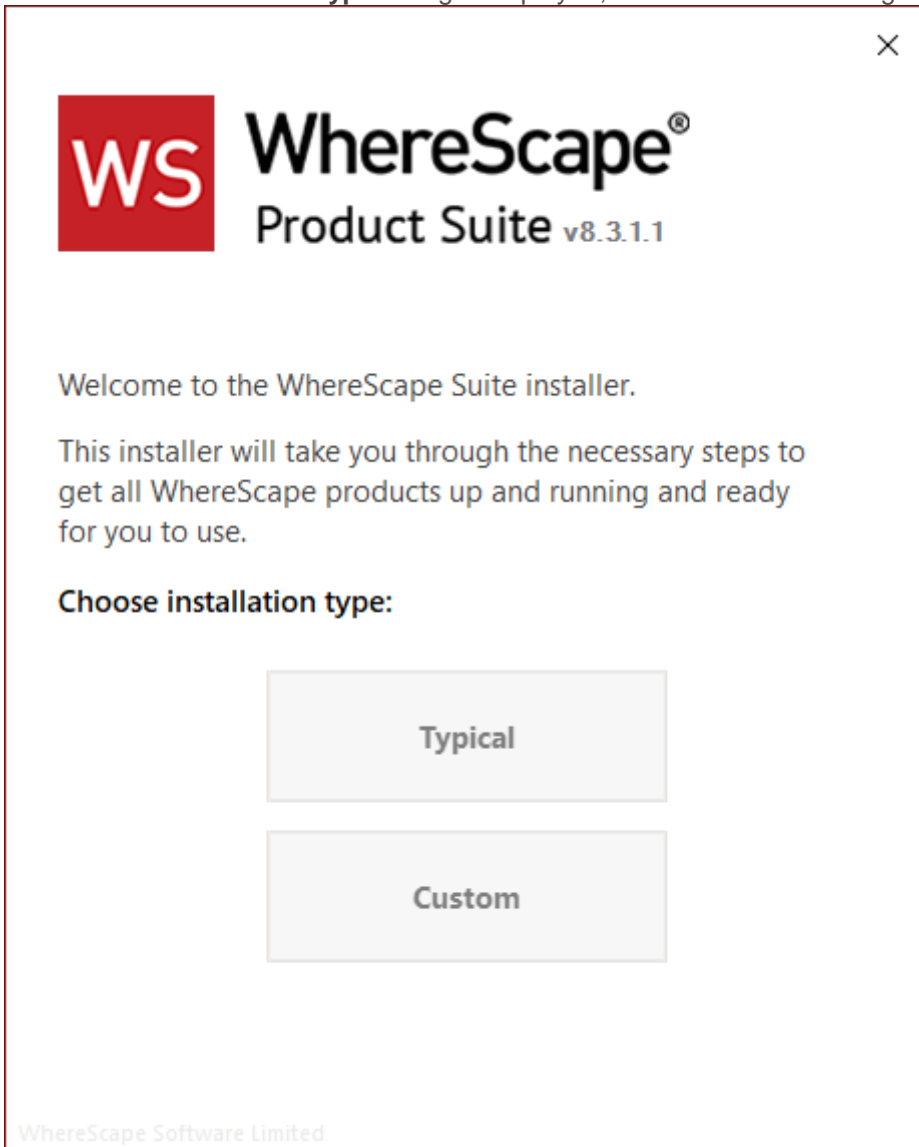
## Upgrade Process

To upgrade to the latest WhereScape 3D:

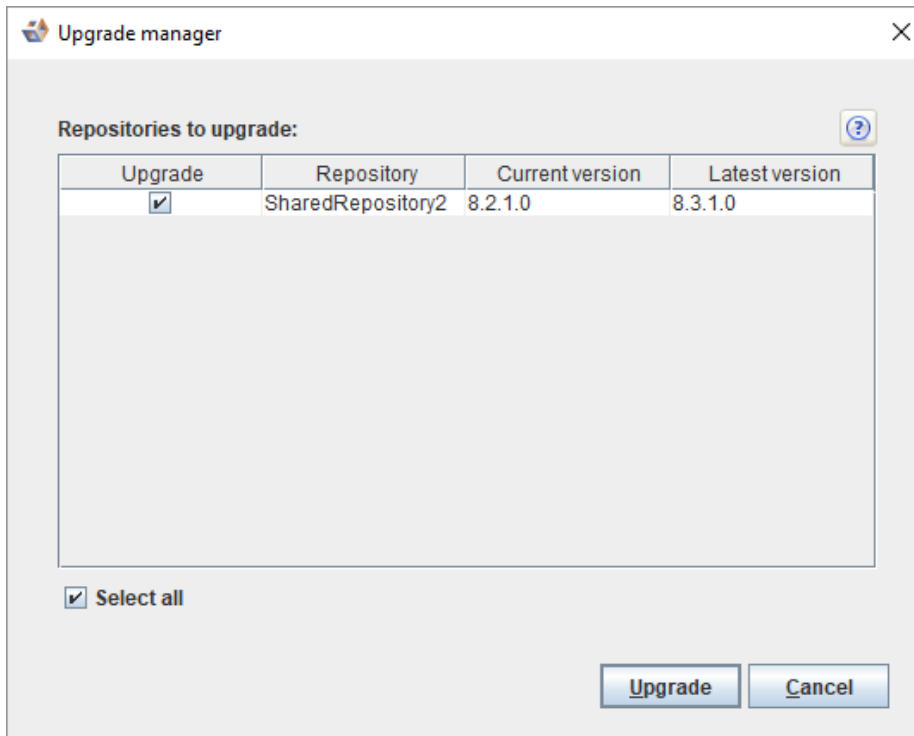
### Note

Before upgrading WhereScape 3D, it is recommended you back up any repositories as part of our standard upgrade procedure. Upgrading any repositories older than 8.3.1.0 will display the **Migration Wizard**.

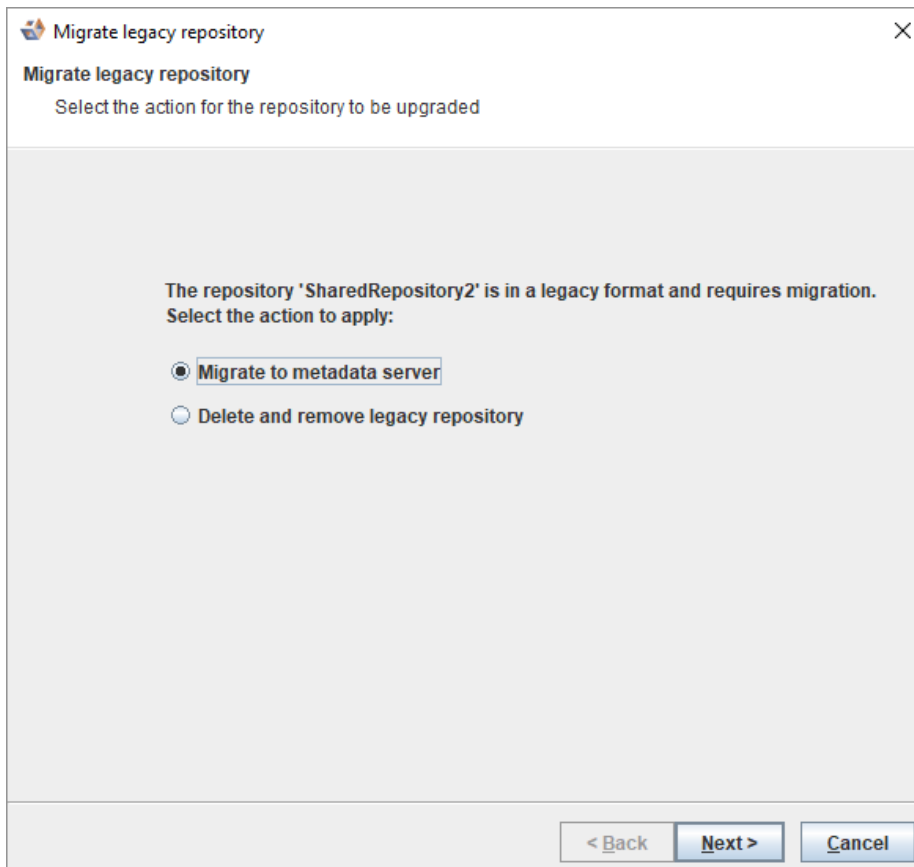
1. Download **3D\_8311.exe** from the WhereScape website.
2. Run the installer.  
The **Choose installation type** dialog is displayed, as show in the following screenshot:



- **Typical** – If you select the **Typical** option, WhereScape Product Suite will be installed with all mandatory, and recommended configurations supplied with the installer.
  - **Custom** - If you select the **Custom** option, you will be provided with screens where you specify all configuration information.
3. After running either **Typical** or **Custom** installation type, launch 3D. The **Upgrade manager** dialog displays all repositories older than the current installed version of 3D.
  4. Select the checkbox for the repositories you want to upgrade and click **Upgrade**.



5. Click **Upgrade**. The **Migrate legacy repository** dialog is displayed.



6. Select the **Migrate to metadata server** radio button and click **Next>**. The **Migrate legacy repository settings** dialog is displayed.

**Migrate legacy repository**

Define settings to new repository for migration

Repository name: Sales Analysis Repository2

Host: localhost

Port: 53722

Create database:

Database name: Enter database name

Database username: Enter database username ?

Password: Enter password

Retype password: Enter password again

Metadata server username: Default is "wsmetauser" ?

Password: Default is "wsmetauser"

Advanced

Validate

< Back Finish Cancel

**Note**

Step 5 and 6 are ONLY displayed if a repository is 8.2.1.1 or below.

- Enter the necessary information and click **Finish**. The **Upgrade manager** dialog is displayed.
  - An **In progress** status is displayed during the migration.

**Upgrade manager**

Upgrading selected repositories:

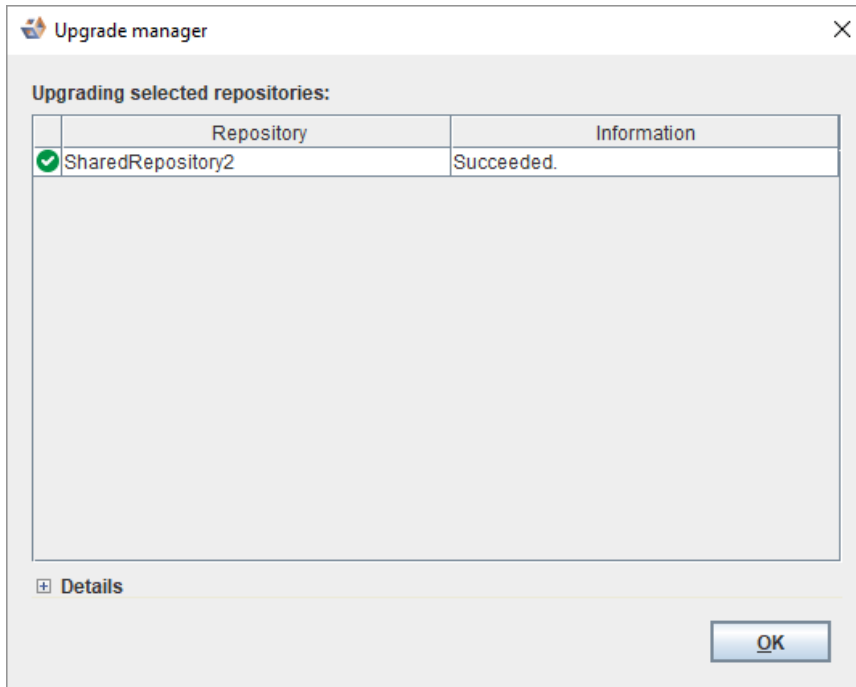
Repository	Information
SharedRepository2	In progress...

Details

OK

- A **Succeeded** status is displayed upon successful completion of the upgrade.





- An error message is displayed in the **Details** section in the event of a failure.
8. Click **OK**.

## Managing Repositories

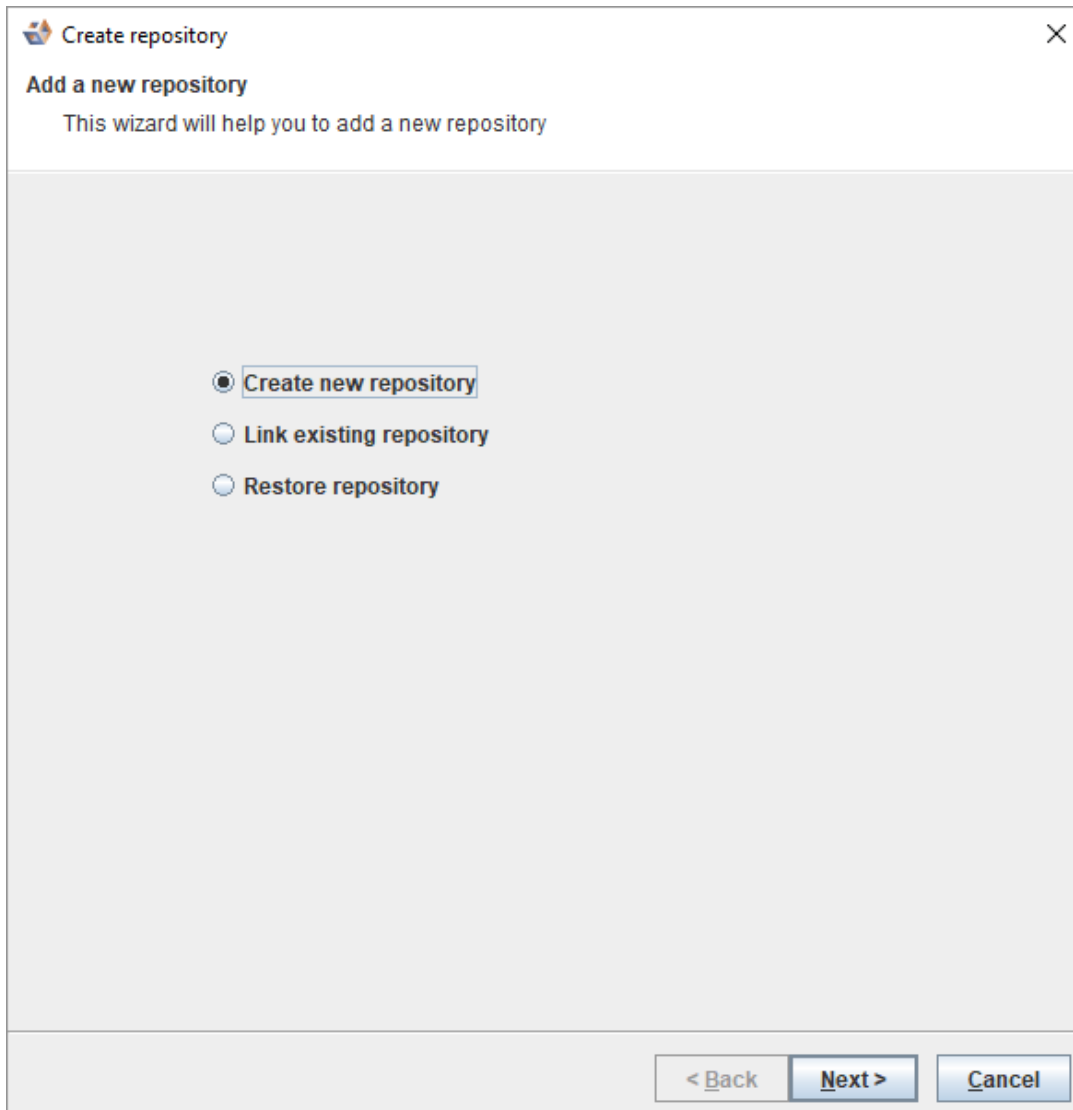
### Creating a New Repository

A repository is normally created during the installation of WhereScape 3D.

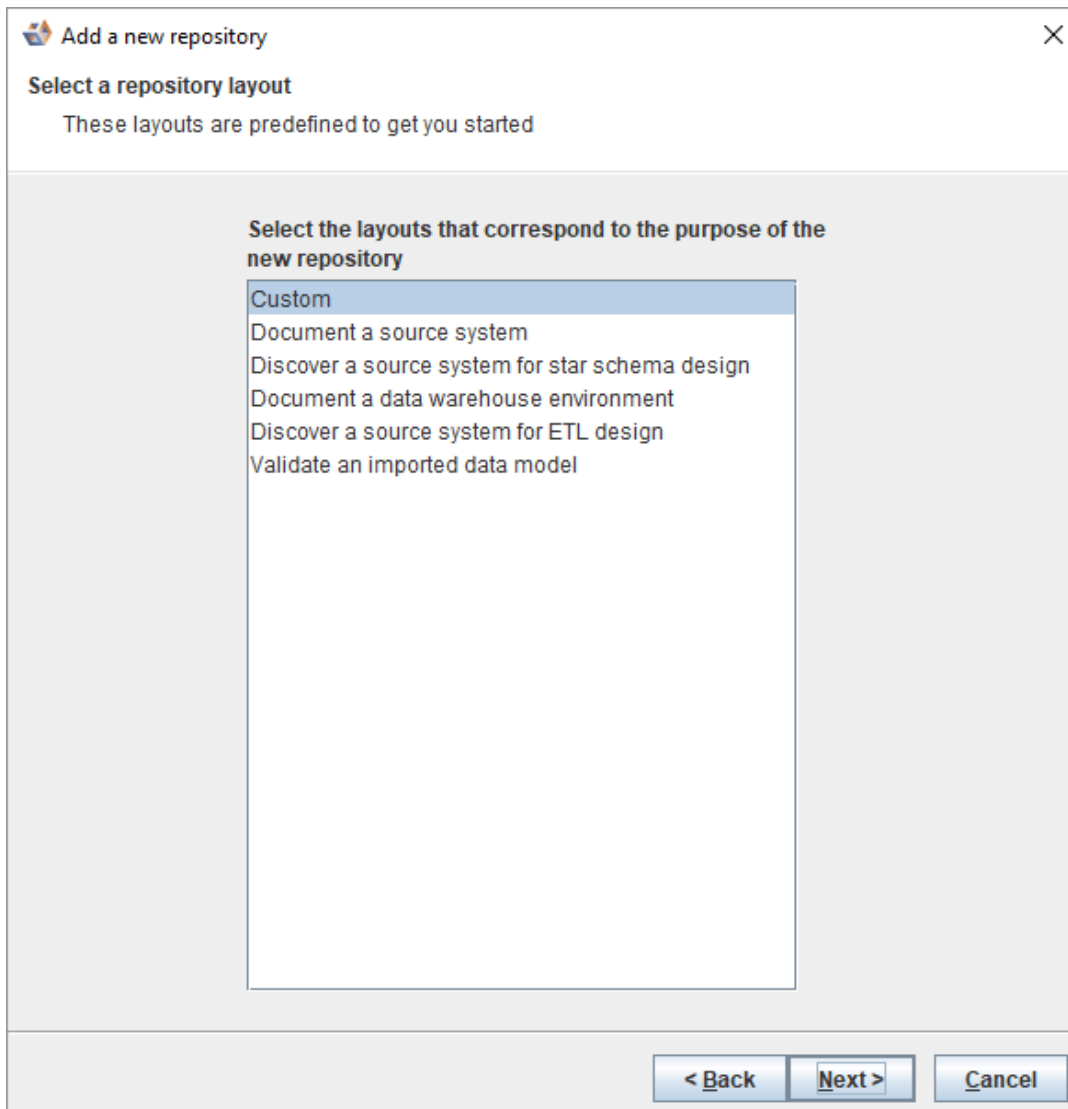
You can add a new repository for a new project, to separate different purposes and designs, or to keep things simple for sharing.



To add a new repository...

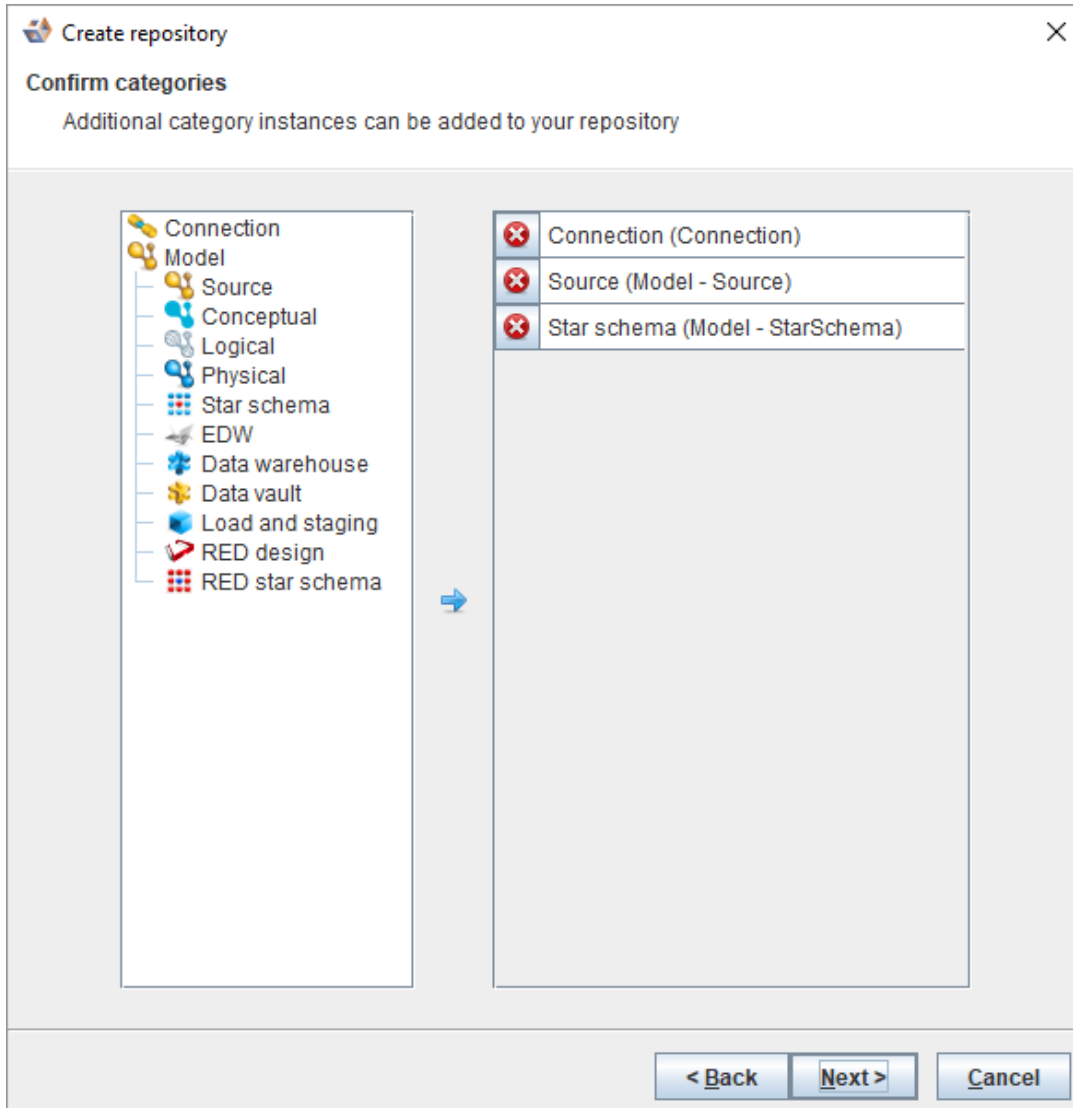
1. Select the **Create new repository** radio button and click **Next** to continue.



2. Select one of the predefined repository layouts or Custom for an empty layout. Click **Next** to continue.



3. You can customize the categories to be created in your new repository.
  - To add categories, select them in the list on the left side and drag them into the list on the right side or select the categories and click .
    - Enter a **Name** and **Description** for the new category and click **OK**.
- To remove an added category, select a category and click . Click **Next** to continue.

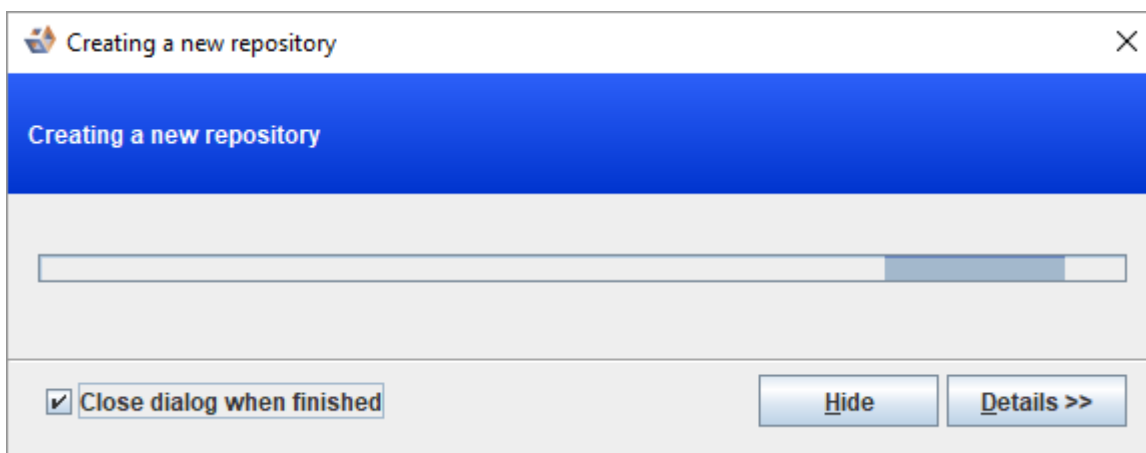


4. On the **Create repository** dialog, as shown in the following screenshot, enter information in the required fields.

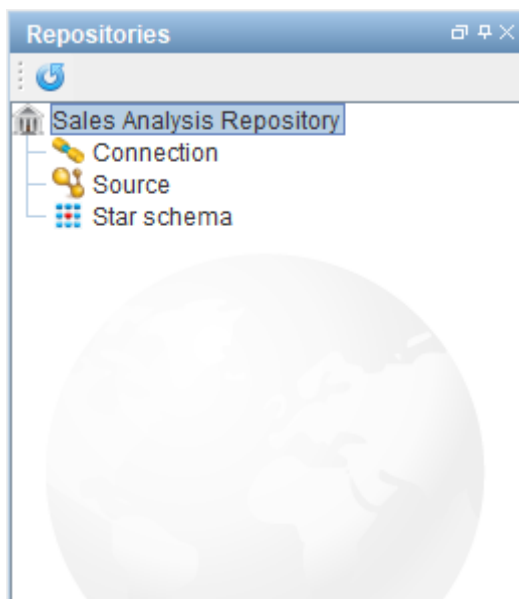
Fields	Description
<b>Repository name</b>	The name of the repository you are creating.
<b>Description</b>	A short description of the repository you are creating.
<b>Purpose</b>	The reason for creating the repository.
<b>Host</b>	Default is <b>localhost</b> but you can enter a new host.
<b>Port</b>	Default is <b>53722</b> but you can enter a new port.
<b>Create database</b>	By default this checkbox is selected. Clear the checkbox if you do not want to create a new database.
<b>Database name</b>	The name of the database.
<b>Database username</b>	The username to access the database.
	<p><b>Note</b></p> <p>If the <b>Create database</b> checkbox is selected, a new username will be created if it does not already exist when creating a database.</p>

Fields	Description
Password	The password to access the database.
Reype password	Re-enter the password that you entered above to access the database.
Metadata server username	A user that has permissions to create database and create roles. Default is wsmetauser.
Password	The password to access meradata server. Default is wsmetauser.
<b>Advanced</b>	
Maintenance database	The database to connect to for creating a database. If left empty the default template1 will be used.
SSL enabled	Select the checkbox to enable SSL.
Validate	Click to validate repository details.

5. Click **Finish**. The **Creating a new repository** dialog is displayed while the new repository is being created.



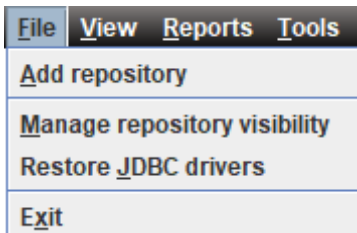
6. The repository can now be seen in the left pane.



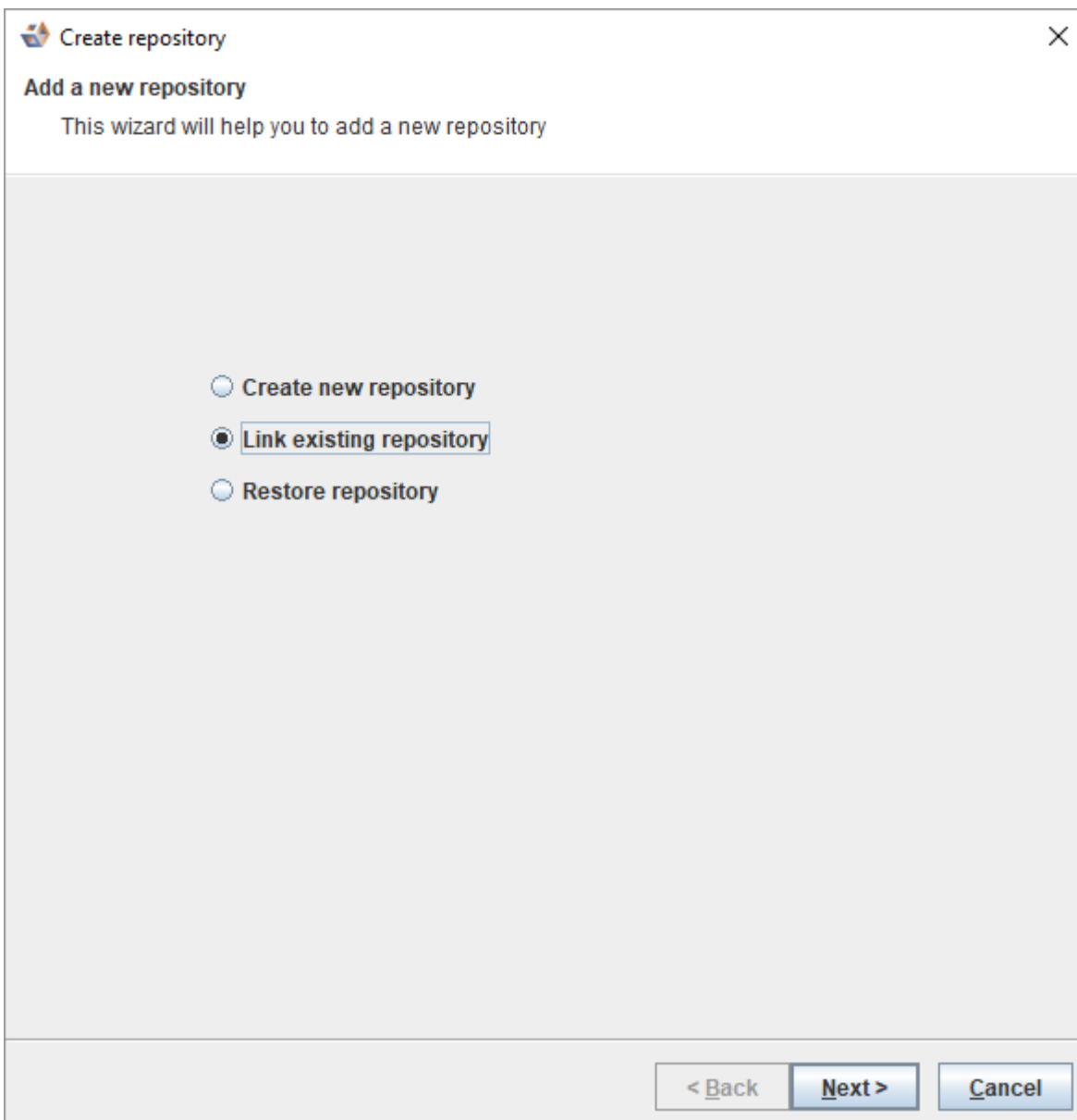
## Linking an Existing Repository

To link to an existing repository:

1. Click on the **File** and select **Add repository**.



2. Select the option to **Link existing repository** and click **Next** to continue.



3. Enter the relevant details to connect to the existing repository and click **Finish**.

**Create repository** [X]

Link existing repository  
Add repository

Repository name:

Host:

Port:

Database name:

User:

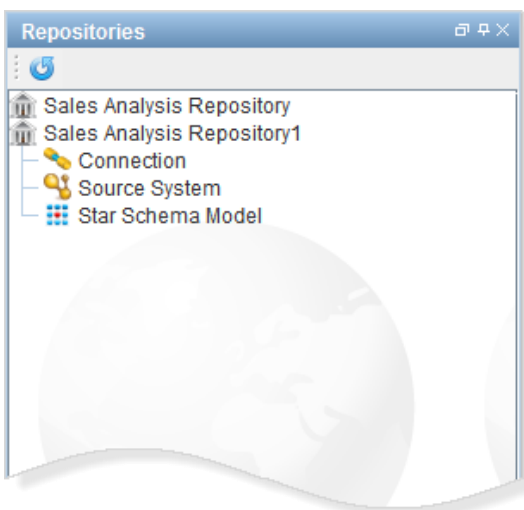
Password:

**Advanced** [collapse icon]

**Validate**

< Back   Finish   Cancel

4. The repository is displayed in the left pane.





## Enabling Remote Access to the WhereScape Metadata Server

To enable remote access to the WhereScape Metadata Server:

1. Open Firewall Port. Default is **53722**.
2. Navigate to `C:\Program Files\WhereScape\WsMetaServer\data`.
3. Right click on **pg\_hba.conf** and open the config file in Notepad.
4. Amend the address values. (Default values shown in the following screenshot)

# Type	DATABASE	USER	ADDRESS	METHOD
#IPv4 local connections:host	all	all	127.0.0.1/32	md5
#IPv6 local connections:host	all	all	:::1/128	md5
#Allow replication connections from localhost, by a user with the # replication privilege				
host	all	all	127.0.0.1/32	md5
host	all	all	:::1/128	md5

- Remove # for an entry you want to edit and update the address. The address can be a host name, or is made up of an IP address and a CIDR mask (as shown in the following example).

# Type	DATABASE	USER	ADDRESS	METHOD
host	all	all	192.168.1.2	md5 # Allow connection from 192.168.1.2 only
host	all	all	192.168.1.0/8	md5 # Allow connection from 192.168.1.x subnet
#host	all	all	192.168.0.0/16	md5 # Allow connection from 192.168.x.x subnet
#host	all	all	192.0.0.0/24	md5 # Allow connection from 192.x.x.x subnet
#host	all	all	0.0.0.0/32	md5 # Allow connection from anywhere

5. Save your changes.
6. Restart the WsMetaServer service once all the settings have been updated.

## Adding a New User and Connecting to a Repository

To add a new user and connect to a repository...

### Tip

Before you add a new user and connect to a repository, log into the repository database you want to connect to using a SQL editing tool and using a user who has createrole permissions and can connect to the database.

1. Run the following script to create a user...

```
CREATE USER "testuser" WITH LOGIN PASSWORD 'testpass';
```

2. Run the following script to grant database access to the user...

```
GRANT CONNECT ON DATABASE "databaseName" TO "testuser";
```

3. Run the following script to grant permissions to the above created user to access all the metadata tables....

```
GRANT ALL ON SCHEMA "wsmeta" TO "testuser";  
GRANT ALL ON ALL TABLES IN SCHEMA "wsmeta" TO "testuser"
```

### Note

If a repository has been upgraded, it is recommended to log back into the database and reapply the above queries for all users that can connect to the database. This is required to ensure there are no permission issues that will block the general usage of WhereScape3D.

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### **WhereScape USA, Inc**

1915 NW AmberGlen Parkway  
Suite 400, Beaverton  
Oregon 97006  
United States  
T: 503-466-3979  
F: 503-466-3978

### **WhereScape Europe**

45 Brook Drive  
Green Park  
Reading RG2 6UU  
United Kingdom  
T: +44-118-914-4509  
F: +44-118-914-4508

### **WhereScape Asia Pte. Ltd**

300 Tampines Avenue 5  
#09-02 Singapore 529653  
T: +65-6679-5728

### **WhereScape Software Ltd**

P.O. Box 56569, Auckland  
1446  
12-16 Tapora Street  
Quay Park  
Auckland 1010, New Zealand  
T: +64-9-358-5678  
F: +64-9-358-5679

[www.wherescape.com](http://www.wherescape.com)