Install Guide - Setup Wizard - Teradata - RED 10.4

WhereScape Enablement Pack for Teradata - RED 10.4

This is a guide to installing the WhereScape Enablement Pack for Teradata for WhereScape RED10

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Prerequisites For PostgreSQL Metadata

Before you begin the following prerequisites must be met:

- Create Database and ODBC DSN :
 - Supported* version of PostgreSQL (PostgreSQL 12 or higher)
 - A database to house the RED Metadata Repository.
 - A database to house scheduler (Optional)
- Software Installations
 - WhereScape RED10.1.x.x with valid license key entered and EULA accepted
 WhereScape Enablement Pack for target database version RED10.1.x.x
- Windows Powershell (64 bit) version 4 or higher
 - To check Windows Powershell Version:
 - Run below command in Windows Powershell

Get-Host | Select-Object Version

Run below command in Command Prompt

powershell \$psversiontable

Run the following command using PowerShell

The security protocol TLS 1.0 and 1.1 used by PowerShell to communicate with PowerShell gallery has deprecated and TLS 1.2 has been made mandatory

```
[Net.ServicePointManager]::SecurityProtocol = [Net.ServicePointManager]::
SecurityProtocol -bor [Net.SecurityProtocolType]::Tls12
Register-PSRepository -Default -Verbose
Set-PSRepository -Name "PSGallery" -InstallationPolicy Trusted
```

Progress bar placeholder info line

Install-Module -Name PoshProgressBar -SkipPublisherCheck -Force

*: RED supports the following versions for the metadata repository: PostgreSQL 12 or higher

Prerequisites Target Database

Before you begin the following prerequisites must be met:

• Access to an Teradata (Target Environment), with the following connectivity information :

- 1. Server Name
- 2. Database Name
- 3. User Name
- 4. Password
- 5. At least one database available to use as a RED Data Warehouse Target with permissions CREATE, EXECUTE, DROP, SELECT PROCEDURE.
- Create Database and ODBC DSN Teradata ODBC driver (64-bit)
 - 1. Add ODBC DSN for Teradata Target Database
 - 2. The 'Return Output Parameters As ResultSet' option is to be checked in the driver options setting.
- Software installation
 - Install the necessary Teradata Tools and Utilities (TTU) (TBuild CLI Tool) as per Teradata's documentation.
- Python 3.8 or higher

 Select "Add Python 3.8 to PATH" from installation Window
 - Pip Manager Install with command : python -m pip install --upgrade pip

Installation Through Setup Wizard

Run Setup Wizard as administrator

| \triangleright | Red Setup Wizard | × |
|------------------|---|-------|
| | WhereScape [®] RED | |
| | Metadata and Enablement Pack Installer This installer will take you through the steps to configure RED and enable your source and target platforms. This installer can be used for creating a new RED metadata repository or to configure an existing metadata repository by installing or upgrading WhereScape Enablement Packs. | |
| | Cancel | Start |

Create new repository or upgrade already existing repository.

| \triangleright | Red Setup Wizard | × | ł |
|------------------|---|---|---|
| | | | 1 |
| | Metadata Repository | | |
| | WhereScape RED requires a PostgreSQL database repository to store its metadata. | | |
| | Create a new metadata repository or select an existing metadata repository to continue: | | |
| | Create new repository | | |
| | Install the RED metadata, configure connections and install Enablement Packs | | |
| | ○ Use existing repository | | |
| | Validate/upgrade your RED metadata and install/upgrade Enablement Packs | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | Cancel | | |

Select the created ODBC DSN, input login details, Connection String and then select "Validate". Press Next

| Configure Metadata Datab | ase |
|--|--|
| RED will need a database to store information ab metadata and connect to it here. | out your data warehouse. Create a database for the RED |
| Data Source Name REQUIRED | |
| install_guide_tera (64-bit) | ✓ □ |
| A Data Source Name created with the ODBC admin tool | |
| User Name | |
| postgres | |
| Password | |
| ••• | |
| Connection String | |
| dsn=\$DSN\$;uid=\$USER\$;pwd=\$PASSWORD\$; | |
| Validate SValidated OK | |

Select the directory that contains unzipped Enablement Pack for installation. Press Next

| ed Setup Wizard | | |
|--|--------------|---|
| WhereScape Enablement Pack | | |
| Enablement Packs contain complete RED configurations for working with a wide range of data sources and your licensed RED data warehouse platform. In order to use RED you must at least install the Target Enablement Pack that matches your data warehouse database platform. Additional Enablement Packs can also be installed or upgraded with this installer. Download a <u>WhereScape Enablement Pack</u> from our Support portal and unzip the file to | | |
| a local directory. Select a directory that contains an unzipped Enablement Pack for installation: | | |
| G:\Work Related\targeteps\ | | |
| The directory that contains required enablement pack sub-directories of items | | |
| | | |
| Cancel | revious Next | t |

Using the check boxed list, include or exclude the components that are to be installed. Press Next.

| 🎾 Red Set | up Wizard | | × |
|-----------|--|------|------|
| | G:\Work Related\targeteps \ | | |
| | Configure Enablement Pack Choose to enable only certain components of the database enablement pack or click Next to enable them | all. | |
| | ✓ Database Function Set | ~ | |
| | ☑ Data Type Mappings Set | ~ | |
| | ✓ UI Configurations | ~ | |
| | ☑ Extended Properties | ~ | |
| | Host Script Languages | ~ | |
| | ✓ Python Modules | ~ | |
| | ✓ Templates | ~ | |
| Car | Previous | | Next |

Configure a target connection (example, Data Warehouse) and its target locations. set Target Database type. Validate and press ADD.

| Add Targets | |
|--|---------------------|
| | |
| Configure the connection where your data warehouse will live. | Added Targets |
| Connection Name REQUIRED | |
| Data Warehouse | |
| A unique name that identifies this connection Data Source Name REQUIRED | |
| | |
| epteammetaRS (64-bit) V | |
| A Data Source Name created with the ODBC admin tool | |
| Database Type REQUIRED | |
| Teradata 🗸 | |
| The target platform type for this connection | |
| Database Name REQUIRED | |
| ag/hoamonialial* | |
| User Name | |
| - Marcine Contract of Contract | |
| Password | |
| | |
| | Previous Next |
| etup Wizard | Previous Next |
| | Previous Next |
| tup Wizard Database Type REQUIRED Teradata | Previous Next |
| etup Wizard Database Type REQUIRED Teradata | Previous Next |
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| etup Wizard Database Type REQUIRED Teradata The target platform type for this connection Database Name REQUIRED epteammetaRS | Previous Next |
| etup Wizard Database Type REQUIRED Teradata The target platform type for this connection Database Name REQUIRED | Previous Next |
| etup Wizard Database Type REQUIRED Teradata The target platform type for this connection Database Name REQUIRED epteammetaRS User Name | Previous Next |
| etup Wizard Database Type REQUIRED Teradata The target platform type for this connection Database Name REQUIRED epteammetaRS | Previous Next |
| etup Wizard Database Type REQUIRED Teradata The target platform type for this connection Database Name REQUIRED epteammetaRS User Name | Previous Next |
| etup Wizard Database Type REQUIRED Teradata The target platform type for this connection Database Name REQUIRED epteammetaRS User Name Password | Previous Next |
| etup Wizard Database Type REQUIRED Teradata The target platform type for this connection Database Name REQUIRED epteammetaRS User Name Password | Previous Next |
| etup Wizard Database Type REQUIRED Teradata The target platform type for this connection Database Name REQUIRED epteammetaRS User Name Password Connection String | Previous Next |
| tup Wizard Database Type REQUIRED Teradata The target platform type for this connection Database Name REQUIRED epteammetaRS User Name Password Connection String dsn=\$DSN\$;uid=\$USER\$;pwd=\$PASSWORD\$; Target Storage Locations REQUIRED | Previous Next |
| etup Wizard Database Type REQUIRED Teradata The target platform type for this connection Database Name REQUIRED epteammetaRS User Name Password Sonnection String dsn=\$DSN\$;uid=\$USER\$;pwd=\$PASSWORD\$; Carget Storage Locations REQUIRED Existing schema (or database names depending on platform) for object storage epteammetaRS | Previous Next |
| etup Wizard Database Type REQUIRED Teradata The target platform type for this connection Database Name REQUIRED epteammetaRS User Name User Name Bassword Connection String dsn=\$DSN\$;uid=\$USER\$;pwd=\$PASSWORD\$; Target Storage Locations REQUIRED Existing schema (or database names depending on platform) for object storage | Previous Next |
| etup Wizard Database Type REQUIRED Teradata The target platform type for this connection Database Name REQUIRED epteammetaRS User Name Password Sonnection String dsn=\$DSN\$;uid=\$USER\$;pwd=\$PASSWORD\$; Target Storage Locations REQUIRED Existing schema (or database names depending on platform) for object storage epteammetaRS | Previous Next |
| etup Wizard Database Type REQUIRED Teradata The target platform type for this connection Database Name REQUIRED epteammetaRS User Name Password Connection String dsn=\$DSN\$;uid=\$USER\$;pwd=\$PASSWORD\$; Target Storage Locations REQUIRED Existing schema (or database names depending on platform) for object storage epteammetaRS Add another Location | Previous Next |

When done, press ADD and then Press Next to advance.

| V Red S | Setup Wizard | | × |
|---------|---|--------------------------------|------|
| | Add Targets | | |
| | Configure the connection where your data warehouse will live. | Added Targets | |
| | | Data Warehouse epteammetaRS | ж |
| | Add another target | | |
| С | ancel | Previous | Next |

Configure a data source connection (optional) and its target locations. Validate and press ADD. Press Next to advance.

| Add ODBC data sources now your sources later in RED | or click 'Next' to skip this step an | d configure | Added Source | S |
|--|--------------------------------------|-------------|--------------|---|
| Connection Name | | | | |
| A unique name that identifies this | connection | | | |
| Data Source Name | | | | |
| | | × 2 | | |
| A Data Source Name created with | the ODBC admin tool | | | |
| 11 N | | | | |
| User Name | | | | |
| User Name | | | | |
| Password | | | | |
| | | | | |
| | | | | |
| Password | | | | |

Review the installation summary and click Install

| Setup Wizard | | |
|---|----------|------|
| Summary | | |
| Metadata Location | ^ | |
| ODBC Data Source: install_guide_tera ODBC Database: (empty) ODBC User Name: postgres Connection String: dsn=\$DSN\$;uid=\$USER\$;pwd=\$PASSWORD\$; RDBMS Type: PostgreSQL | | |
| Enablement Pack Directory "G:\Work Related\targeteps | ^ | |
| Database Functions Set Database Function Sets/Teradata Function Set.xml (16 KB) | | |
| Data Type Mappings Set Data Type Mappings/Teradata from File.xml (6 KB) Data Type Mappings/Teradata from SQL Server.xml (6 KB) Data Type Mappings/Teradata from Teradata.xml (8 KB) Extended Properties | | |
| ancel | Previous | tall |

Clicking on the View Logs will take to the installation log. Click on Finish once the installation is completed successfully.

| Red Setup Wizard | × |
|--|--------|
| WhereScape [®] RED | |
| Your WhereScape RED repository was successfully configured! | |
| Note: Some Enablement Pack installations require further configuration steps once in RED. When required this additional configuration will start automatically within RED after log in. | |
| | |
| | |
| ☑ Launch RED | |
| | |
| View Logs | Finish |

Login to WhereScape RED.

| | x |
|---|---|
| | REPOSITORY LOGIN |
| | DATABASE |
| | Data Sources: edw_td_release (64-bit) |
| WhereScape® | Profile: edw_td_release V |
| | Database Login ID: |
| RED | Password: ***** |
| • | Connection String: dsn=\$DSN\$;uid=\$USER\$;pwd=\$F |
| | METADATA REPOSITORY |
| Version 10.4.0.0 by WhereScape, Inc. Copyright © 2025 Licensed to Data Entrega Partner License Expires 31 DEC 20/ | RED User Name: |

Note: There is a post-install script that will run at the first login to RED10 to complete the post setup wizard installation process. You will be directed to below PowerShell window which will give brief explanation about post installation process.

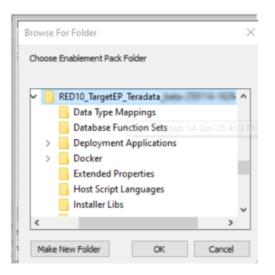
| Post Inst | allation Setup for Enablement Pack | × |
|-----------|---|---|
| i | The installation process will set up and configure the enablement pack, install necessary Python and PowerShell modules and libraries. | |
| | During installation you will be prompted to select the Enablement pack folder location and set either Python or PowerShell default template set. Additionally, you will have the option to choose the target location for deploying applications. | |
| | Select the appropriate options when prompted to ensure a successful installation. | |
| | Click 'OK' to continue with the installation process. Click 'Cancel' to cancel the installation process and redirect to RED. | |
| | OK Cancel | |

Press OK to start the post installation. If pressed Cancel installation will stop and user will be directed to RED.

The user will be directed to the window below, where they have to select the target connection to be configured. Additionally, by deselecting the provided options, the user can choose not to install a particular option. "Reset Extended Properties" is deselected by default.

| Target Connection – X | | | |
|---|--|--|--|
| Select the target connection to configure | | | |
| | | | |
| Select suitable boxes to install selected options | | | |
| ✓ Options Configuration | | | |
| I ✓ Deployment Applications | | | |
| I Python Libraries | | | |
| V Powershell Modules | | | |
| Reset Extended Properties | | | |
| OK Cancel | | | |

You will be directed to below PowerShell window. Provide the directory that contains unzipped Enablement Pack.

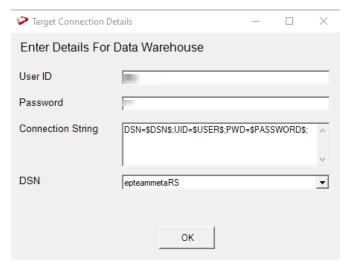


Press OK

The user will be directed to the window below, where they have to select if the user wants to create a new profile.

| Please Select Required Field | _ | \times |
|-------------------------------------|-------|----------|
| Do you want to create a new profile | file? | |
| Yes, Create new one | | |
| C No, Use existing one | | |
| ОК | | |

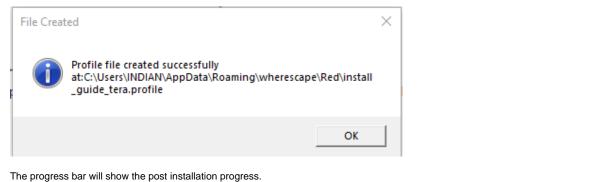
If the user selects 'Yes,' they must enter the data warehouse details. If the user selects 'No,' they must choose an existing profile file to use.



Enter profile file name

| 🎾 Profile File Name | _ | × |
|----------------------------|-----------|----|
| Please enter the profile f | ile name: | |
| had put on | | |
| | ок | // |

profile file gets created successfully



| Post-Installation Steps | _ | \times |
|--|---|----------|
| | | |
| 25% | | |
| Enablement Pack Setup | | |
| Setting extended properties and windows connection | | |

User will have to choose the database for the target setting that were provided. One pop up will come for setting default target for Date Dimension.

| \triangleright | Select Target Name 🗧 | | × |
|------------------|---|--------|---------|
| Ple | ease select target name to install Date | Dime | ension: |
| | _ | | |
| ept | teammetaRS | | - |
| | ОК С | Cancel | |
| | | | |

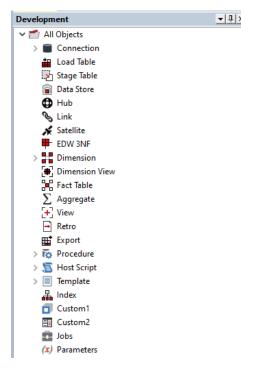
After selecting the target progress bar will show the progress for the installation and once it's completed, you will get the below pop up.



After pressing OK RED10 will open automatically.

| Developm | sent • 1 × | Obj | ject R | esults | |
|------------|----------------|------|--------|----------|--|
| 🗸 🗂 All | Objects | | | | |
| > | Connection | | | | |
| ** | Load Table | | | | |
| | Stage Table | | | | |
| 1 | Data Store | | | | |
| • | Hub | | | | |
| 0 | Link | | | | |
| * | Satellite | | | | |
| | EDW 3NF | | | | |
| <u>i</u> ∎ | Dimension | | | | |
| - F | Dimension View | | | | |
| X | Fact Table | - | | | |
| | Aggregate | Resu | | | - (1)× |
| | View | 0 | bject | | Message |
| | | 0 | F. | wsl_post | . owner "dim_date_td" |
| B | Export | ۲ | ┝ | | . 603 Success object:generate-routine The routine "unix_action_dim_date_td" was generated for the routine owner |
| | Procedure | 0 | L | wsl post | . "dim_date_td" |
| | | 0 | | | 700 Success Execute-SQL-Block {Execute SQL Queries from ODBC connection to: install guide tera} |
| | Template | | Г | wsl_post | |
| | | 0 | - | | |
| 0 | | 0 | F | wsl_post | |
| 21 | | 0 | + | | . Installer log saved to file: C:\Users\INDIAN\AppData\Locaf\Temp\WsEnablementPackinstall_0114042616.log |
| | | 0 | L | wsl_post | . Post installation steps are completed. Please restart RED once to continue |
| | | | | | |

User will need to restart RED once.



Upgrade Of Existing Repository

For upgrade of existing repository

• From host script set script type of wsl_post_install_enablement_pack as Auto Execute - PowerShell Script

| operties | Name: | wsl_post_install_enablement_pack | T | ype: Auto Execute - PowerShell : |
|----------|-------------------------------------|--|--------|----------------------------------|
| otes | Purpose: | This script was inserted by WhereScape RED CLI | | |
| | | | | |
| | Owner: | WhereScape RED CLI | Delete | Lock |
| | Last Update By: | | | |
| | Connection Name: | | ~ | |
| | Edit Lock | | | |
| | Locked For Edit By: | | | |
| | Edit Lock Reason or Last Update: | New Script | | ~ |

Important Upgrade Notes

If RED upgrade the repository option is chosen.

This enablement pack will overwrite any existing Source Enablement Pack UI Configs:

| Connection UI Config | Load UI Config |
|------------------------------|--|
| Amazon S3 | Load From Amazon S3 |
| Azure Data Lake Storage Gen2 | Load From Azure Data Lake Storage Gen2 |
| Google Cloud | Load From Google Cloud |

To ensure existing Source Enablement Pack connections and associated Load Tables continue to browse and load:

Go into UI Configuration Maintenance in RED prior to installing this Enablement Pack and rename the affected UI Configurations. While the updated Load Template will work with previous Source Enablement Pack's we recommend moving these previous versions of Load Tables to newly created Parser based connections following this install. The earlier versions of the Source Enablement Pack will be deprecated following this release.

Post Install Steps – Optional

If you used the script Setup Wizard for installation then the following optional post install steps are available.

Configure Connections

There were two connections added that will optionally require your attention :

- 1. Connection: 'Database Source System' this connection was setup as an example source connection,
 - · open it's properties and set it up for a source DB in your environment
 - or you can remove it if not required
- 2. Execute Update Procedure for dim_date_td to Initialize Date Dimension for Target

| | | Re-create an Existing Table | | | × | | | |
|---|---|-------------------------------------|--|----|--|--|--|--|
| Dimension epteammetaRS.dim_date_td Procedures associated with this table wil | Dimension epteammetaRS.dim_date_td already exists. All data will be lost! Procedures associated with this table will be invalidated. | | | | | | | |
| Drop and Re-Create it? | | | | | | | | |
| (Right click on an item, other than the fin | st item, for cont | ext menu options.) | | | | | | |
| Object | Action | Note | | | | | | |
| _dim_date_td table | Recreate | | | | | | | |
| update_dim_date_td stored procedure | Recompile | *** Procedure has been modified *** | | | | | | |
| update_dim_date_td stored procedure | Execute | | | | | | | |
| dim_date_td table | Display Data | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| ✓ Save these choices as the Defaults | ✓ Save these choices as the Defaults | | | | | | | |
| Count the Rows in the Table Note: | A row count m | ay take some time for large tables. | | ОК | Count the Rows in the Table Note: A row count may take some time for large tables. OK Cancel | | | |

NOTE: Please avoid regenerating the procedure update_dim_date_td as it is a custom procedure.

Source Enablement Pack Support

| Source Pack Name | Supported By Teradata | Supported Features | Prerequisites |
|---------------------------------------|-----------------------------|---|--|
| Amazon S3 | Yes | | Teradata Access Module for S3 (CSV) - Create a credential file by following the documentation linked below, and paste the directory location of the credential file into the 'Amazon S3 Config Directory' Extended Property: |
| | | Load Template, Source Properties will have following file load routine options: | https://docs.teradata.com/r/Enterprise_IntelliFlex_Lake_VMware/Teradata-Tools-and-Utilities- Access-Module-Reference-20.00/Teradata-Access-Module-for-S3/The-config-and-credentials- Files |
| Azure Data Lake Storage Gen2 | Yes | MultiLoad FastLoad Load TPT UpdateTPT StreamTPT | Teradata Access Module for Azure Blob (CSV) - Create a credential file by following the documentation linked below, and paste the directory location of the credential file into the 'Azure Config Directory' Extended Property: https://docs.teradata.com/r/Enterprise_IntelliFlex_Lake_VMware/Teradata-Tools-and-Utilities-Access-Module-Reference-20.00/Teradata-Access-Module-for-Azure-Blob/The-Credentials-File |
| Google Cloud Storage | Yes | - | None |
| Windows Parser | Yes | _ | Refer to Windows Parser Guide |
| Database | Yes | Load Template, using TPT Load Type, Source Properties will have following types: • Load TPT • UpdateTPT • StreamTPT Load Template with Script based load type. | None |

Troubleshooting and Tips

Run As Administrator

Press the Windows Key on your keyboard and start typing cmd.exe, when the cmd.exe icon shows up in the search list right click it to bring up the context menu, select "Run As Administrator"

Now you have an admin prompt navigate to to the folder where you have unpacked your WhereScape Red Enablement Pack to using the 'cd' command:

C:\Windows\system32> cd <full path to the unpacked folder>

Run Powershell (.ps1) scripts from the administrator prompt by typing the Powershell run script command, for example:

C:\temp\EnablementPack>Powershell -ExecutionPolicy Bypass -File .\Setup_Enablement_Pack.ps1

Notes: In the event you can not bypass the Powershell execution policy due to group policies you can instead try "-ExecutionPolicy RemoteSigned" which should allow unsigned local scripts.

Windows Powershell Script Execution

On some systems Windows PowerShell script execution is disabled by default. There are a number of workarounds for this which can be found by searching the term "PowerShell Execution Policy".

Here is the most common workaround which WhereScape suggests, which does not permanently change the execution rights:

Start a Windows CMD prompt as Administrator, change directory to your script directory and run the WhereScape Powershell scripts with this command:

cmd:>Powershell -ExecutionPolicy Bypass -File .\<script_file_name.ps1>

Restarting failed scripts

Some of the setup scripts will track each step and output the step number when there is a failure. To restart from the failed step (or to skip the step) provide the parameter "-startAtStep <step number>" to the script.

Example:

Powershell -ExecutionPolicy Bypass -File .\<script_file_name.ps1> -startAtStep 123

Tip: to avoid having to provide all the parameters again you can copy the full command line with parameters from the first "INFO" message from the beginning of the console output.

Python requirements for offline install

Additionally to the base Python installation being required, the WhereScape Python Template set also requires certain additional Python libraries. The install scripts uses the PIP (package manager) to download these libraries, however for offline installs you will need to install the required libraries yourself.

Required Python libraries/add-ons:

- pywin32-ctypes
- python-tds
- pywin32
- glob2
- gzip-reader
- regex
- pyodbc

To create view with cross database reference

For cross database reference view creation user needs to run this command "GRANT ALL ON DATABASE1 TO DATABASE2 WITH GRANT OPTION"

If a valid RED installation can not be found

If you have RED 10.x or higher installed but the script (Setup_Enablement_Pack.ps1) fails to find it on you system then you are most likely running PowerShell (x86) version which does not show installed 64 bit apps by default. Please open a 64 bit version of PowerShell instead and re-run the script.