WhereScape® Product Suite

Installation and Configuration Manual

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About this Document

The purpose of this document is to provide user level instructions on how to install and configure the WhereScape Metadata 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, Linux/Unix or Mac operating systems.
- 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.

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Installing WhereScape Product Suite

To install WhereScape 3D and the WhereScape Metadata Server:

1. Download the latest executable file 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. If upgrading from version 8.5.1.3 or below, an upgraded version of the WhereScape metadata server can be installed. If the metadata server is to be upgraded please follow the steps in the section upgrading the WhereScape metadata server. If the metadata server will not be upgraded, select to install only WhereScape 3D when prompted.

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.

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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:

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** for 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:

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

6. Click **Finish**.

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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.

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:

7. 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:

8. 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.

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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:

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_9066.exe /quiet
```

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

```
3D_9066.exe /quiet META_DB_SERVICE="MyWsMetaServer"
```

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

```
3D_9066.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_9066.exe /quiet /L*vx ws.log OPTIONS="<absolute\path\to\options\file>"
;
; > SET pwinstaller="META_DB_PASS=<pass1> MDDB_PASS=<pass2>"
; > 3D_9066.exe /quiet /L*vx ws.log OPTIONS="<absolute\path\to\options\file>" %pwinstaller%
; ======================
; Metadata Server options
```

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```
; ======================
; 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"
```

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Upgrading to the Latest Version of 3D

Overview

Following is an overview of upgrading local repositories...

Following is an overview upgrading centralized repositories...

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**. The WhereScapemetadata server was upgraded in version 8.6.2.0. Upgrading the metadata server is not a requirement for using WhereScape 3D 9.0.6.6

1. Download the latest executable file 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. If upgrading from version 8.5.1.3 or below, an upgraded version of the WhereScape metadata server can be installed. If the metadata server is to be upgraded please follow the steps in the section upgrading the WhereScape metadata server. If the metadata server will not be upgraded, select to install only WhereScape 3D when prompted.
4. 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.
5. Select the checkbox for the repositories you want to upgrade and click **Upgrade**.
6. Click **Upgrade**. The **Migrate legacy repository** dialog is displayed.
7. Select the **Migrate to metadata server** radio button and click **Next >**. The **Migrate legacy repository settings** dialog is displayed.

Note

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

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

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- 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.

9. Click **OK**.

Upgrade the WhereScape Metadata server

The version of PostgreSQL used by the WhereScape Metadata server was upgraded from version 10.3 to version 12.4 in 3D 8.6.2.0, however, upgrading the WhereScape Metadata server is not a requirement for using more recent versions of WhereScape·3D.

PostgreSQL 12.4 offers a number of improvements, including some relating to security. Full details available **here.**

To upgrade the metadata server, you must also upgrade all repositories. Follow the steps below:

- Backup all repositories via the Backup repository option in WhereScape 3D

  .

  - Right-click on the repository name in 3D
  - Select backup repository.
  - Select a location to store the backups and optionally change the name of the backup file.
- Unlink all repositories via the Unlink repository option in WhereScape 3D

  .

  - Right-click on the repository name in 3D.
  - Select Unlink repository.
- Uninstall the WhereScape Metadata Server via the Windows Control Panel.
- Manually remove the WhereScape Metadata Server database directory.
  - In Windows File Explorer delete the following directory: C:\Program Files\WhereScape\WsMetaServer\data
  - Reboot the Windows machine.
- Install WhereScape 3D and the WhereScape Metadata Server using the installer found at: https://www1.wherescape.com/support/software-downloads-documentation/wherescape-3d/release-version/
- When the upgraded version of WhereScape 3D is first opened you will be prompted to add a repository. Select 'Restore' repository, then browse to the location where your backup is saved. If there are multiple repositories to be upgraded, they can be restored via the File > Add Repository option in WhereScape 3D.

- When asked whether you want to upgrade your repository select: Yes.

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

Fields	Description
Repository name	The name of the repository you are creating.
Description	A short description of the repository you are creating.
Purpose	The reason for creating the repository.
Host	Default is **localhost** but you can enter a new host.
Port	Default is **53722** but you can enter a new port.
Create database	By default this checkbox is selected. Clear the checkbox if you do not want to create a new database.
Database name	The name of the database.
Database username	The username to access the database. **Note** If the **Create database** checkbox is selected, a new username will be created if it does not already exist when creating a database.
Password	The password to access the database.
Retype password	Re-enter the password that you entered above to access the database.
Metadata server username	A user that has permissions to create databases and create roles. Default is wsmetauser.
Password	The password to access the metadata server. Default is wsmetauser.
Advanced	
Maintenance database	The database to connect to for creating a database. If left empty the default template will be used.
SSL enabled	Select the checkbox to enable SSL.
Validate	Click to validate repository details.

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

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

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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**.
4. The repository is displayed in the left pane.

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Enabling Remote Access to the WhereScape Metadata Server

WsMetaServer is installed and configured such that it can ONLY be connected locally.

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)

    - 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).

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

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Using WhereScape3D With Multiple Users

Configure 3D for concurrent users on a terminal server

The setup for 3D prompts for a "storage location" which by default is a non-user-specific location like "C:\WhereScape\3D\". This configuration is intended for a single user PC and in this configuration you will not be able to start a second concurrent session of 3D on the same computer because the first session will have locked the files in this location. The second session of 3D started will detect this and automatically shut down.

Configure 3D for concurrent users during Installation

To enable multiple users to run 3D concurrently on the same computer (e.g. when the computer is being used as a Terminal Server), you need to select a user-specific storage location during the installation process so that each user has a separate profile, i.e. when installing 3D for each user select the "C:\Users\<user name>\3D" option for the "Store files in:" location.

Configure 3D for concurrent users after Installation

If you have already installed 3D and chose the "C:\WhereScape\3D\" option (or another non-user-specific location) to store files in, then you can manually change it by following these steps:

1. Copy the content of C:\WhereScape\3D\ to a new folder of C:\Users\<user name>\3D *for each user that will log on to the computer and use 3D*
2. Delete the original C:\WhereScape\3D\ folder

This will set up each user with their own repository and settings and they will be able to work concurrently.

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"
GRANT ALL ON ALL SEQUENCES 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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