DATAWATCH | GET THE WHOLE STORY™

Designer

13.0

[Installation & Troubleshooting Guide]

This document describes how to install Datawatch Designer and use it for the first time.

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Overview

Installation Packages

Datawatch includes several separate installation packages:

- Datawatch Designer 32-bit
- Datawatch Designer 64-bit
- Datawatch Server – Visualization Edition, .NET Server 32-bit
- Datawatch Server – Visualization Edition, .NET Server 64-bit
- Datawatch Server – Visualization Edition, Java

The Datawatch Designer program can be used on its own without being connected to the Datawatch Server component. Designer allows users to design and use new Designer Workbooks and Dashboards and also publish to the server, for distributed web access.

Datawatch Server – Visualization Edition is the best way make Designer Workbooks and Dashboards available to large numbers of users.

Both components are licensed to provide data connectivity and visualization options.

A typical installation scenario is to provide authors with copies of Designer. They develop new Workbooks and Dashboards based on user requirements and then publish them to Datawatch Server – Visualization Edition. Most business users then access the system over the web with no local software installation needed.

Downloading Datawatch Designer

You can download Datawatch Designer directly from our support website.

If you have received this document without the software package itself, if you need to acquire a new version of Designer, or if you wish us to deliver an add-on, please contact Datawatch directly using the information listed on the cover pages of this document.

Our standard installation consists of:

- 32-bit: DatawatchDesignerx86wInstaller.exe
- 64-bit: DatawatchDesignerx64wInstaller.exe

Licensing

Licensing within Designer supports three modes of operation:

- Stand alone with an associated license key. (requires a Nalpeiron licensing service to be running on the machine)
- Stand alone with a valid license file.
- Connected to a Datawatch Server – Visualization Edition, with a valid license file.

Both the license key and license file are delivered separately from the installation packages.

Note that if you install Designer for stand-alone use, it will request activation through entering the license key during first use. If you install Designer for use with the Server component, the Designer software will retrieve its license automatically from the Server. Datawatch Server - Visualization Edition allows the systems administrator to upload the license file.

System Requirements

The Designer is supported on Microsoft Windows operating systems, including:

- Windows XP (Without the LocalDB option),
- Windows Vista
- Windows 7
- Windows 8
- Windows 8.1
- Windows Server 2008
- Windows Server 2012

These can be physical or virtualized systems. Further information on minimum configurations is listed in the Designer Reference Guide.

To support R data transforms & connectivity it also requires:

- R
- R Serve
- Additional libraries as required for specific capabilities

To support Python data transforms & connectivity it also requires:

- CPython
- Pyro 4.24 / 4.25 (Python Remote Data Objects)
- Additional modules such as Numpy, Scipy and Pandas, as required for specific capabilities

IMPORTANT Designer requires Microsoft .NET Framework 4 or above.

Additionally it requires Microsoft .NET 4.5 or above to support LocalDB as a caching option. Refer to *Setting Up LocalDB as the Caching Option* for more information.

Designer also requires administrative privileges during installation. Administrative privileges are not required after installation is complete.

Installing Datawatch Designer

Designer is a Windows program for use in a desktop environment. The install file consists of a single executable:

- 32-bit: DatawatchDesignerx86wInstaller.exe
- 64-bit: DatawatchDesignerx64wInstaller.exe

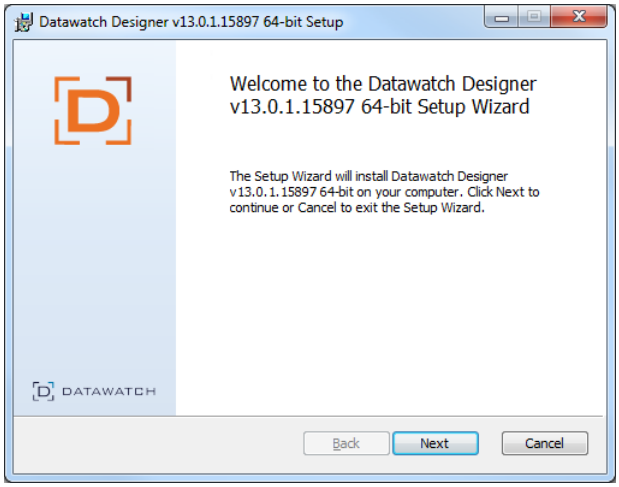
  A separate MSI and **setup.exe** is available on request for integration into corporate delivery mechanisms.

Steps:

1. Run **setup.exe** as an administrator (Right-click and **Run as Administrator**).

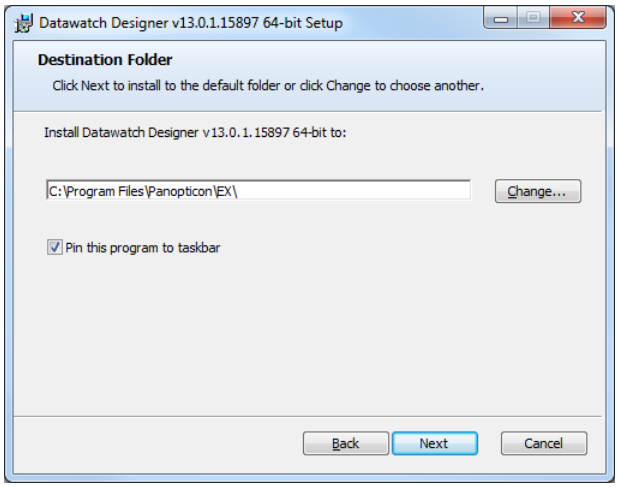
   The License Agreement dialog displays.
2. Read the license agreement and check **I agree...**
3. Click **Install**.

   The *Setup Wizard* displays:



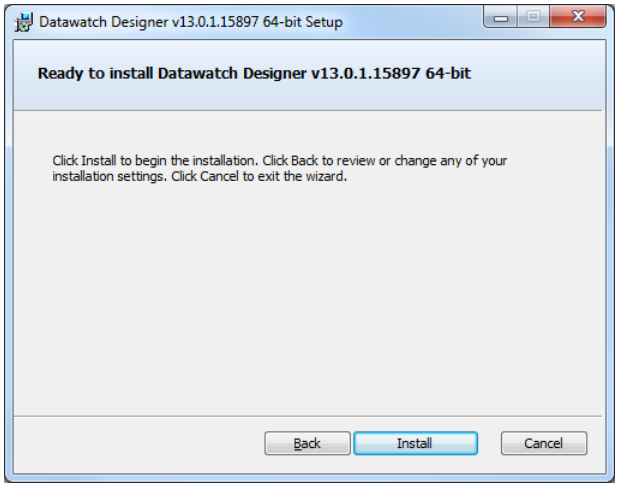
4. Click **Next**.

   The *Select Installation Folder* dialog displays:

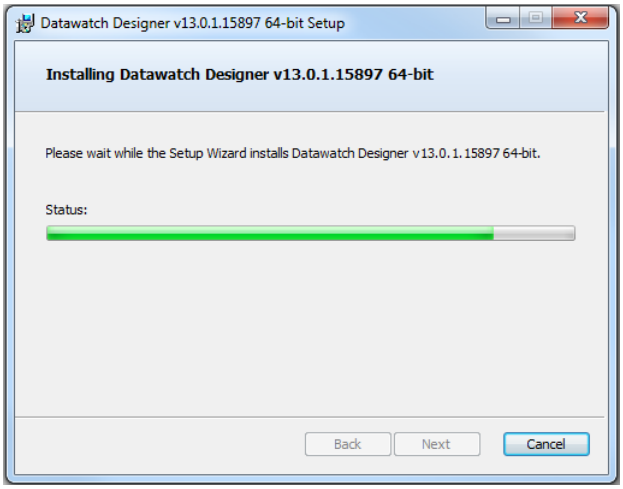


5. Confirm the installation folder.
6. Select if you want to pin the application to the taskbar.
7. Click **Next**.

   The *Confirm Installation* dialog displays:

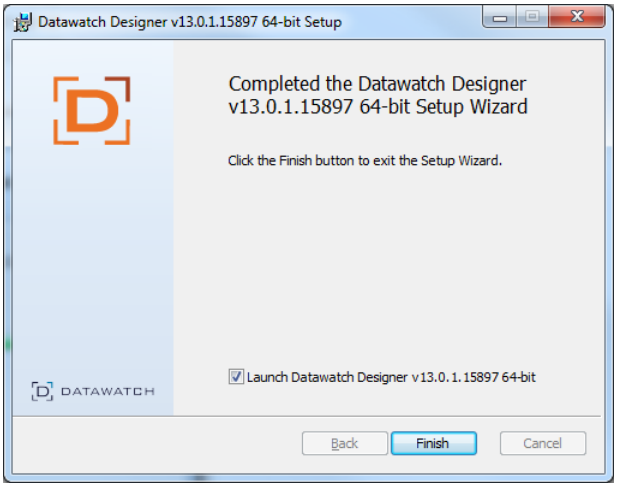


8. Click **Install** to confirm the installation. You will be informed about the progress of the installation process:



Installation typically takes less than 30 seconds.

You will be notified once the installation is complete:



9. And finaly click **Finish**.

   The installation creates a *Datawatch Desktop* folder under the user's *My Documents* folder. Within this folder you will find several sub-folders:

   - Data
   - DataPrep
   - Datatables
   - Example Datatable Templates
   - Example Workbooks
   - Workbooks
   - Bookmarks
   - Cached Data
   - Global Caches

These folders are the default locations for Workbooks and Data Tables created with the Designer software; plus storage for any data files retrieved from the Datawatch Server - Visualization Edition.

The installation program also creates a log file under the user's profile within the Application Data folder in Windows XP (the `AppData\Roaming` folder in Vista & Windows 7/8) using this folder structure:

`\Panopticon\EX\Log.txt`

This log file can also easily be retrieved by using the *Help – Export Log File…* menu option within the Designer.

Silent Install of Datawatch Designer

Silent installation is also supported for Designer. There are two ways to do this:

- Running a command line
- Running a batch file

Refer to the steps below.

SILENT INSTALL THROUGH RUNNING A COMMAND LINE

Steps:

1. Run the following command line on the Command prompt as an Administrator:

   ```
   msiexec.exe /q /l* {logfile.txt} /i {setup.msi}
   ```

   Where:

   - `/l* {logfile.txt}`
   - This tells the installer to log everything into the file found at `logfile.txt`. The user can opt to define a full path in the `logfile.txt`. Since this is a silent install, the data in this log file often only contains clues on what the installation has encountered.
   - `/i {setup.msi}`

     This points Windows installer to the MSI file that contains the program you want to install. The contents of `{setup.msi}` can either be located on the local the machine or remote via a UNC path.

     The UNC path enables the user to store the software installation files on a file server and invoke them over the network.

2. However, if the default configurations will not be used for the silent installation, the desired configuration details (i.e., custom name and value pairs) are required and are added at the end of the command mentioned above:

   ```
   msiexec.exe /q /l* {logfile.txt} /i {setup.msi} {NAME=Value}
   ```

SILENT INSTALL THROUGH RUNNING A BATCH FILE

Running the silent installation through a batch (.bat) file is highly recommended for large scale deployment as the batch file can be easily executed on all machines.

NOTE

Make sure the Designer MSI file location mentioned in the command line is accessible.

Steps:

1. Create a new text file and copy the preferred command line mentioned in the previous section:
   - `msiexec.exe /q /l* {logfile.txt} /i {setup.msi}`
   - `msiexec.exe /q /l* {logfile.txt} /i {setup.msi} {NAME=Value}`
2. Save this as a batch (*.bat) file.
3. Double-click this batch file as an Administrator.

Data Connectors Third Party Software Installation

A number of data connectors require additional third party software installation to be enabled and listed in the *Connect to Data* dialog. These include:

- StreamBase 7.1
- StreamBase LiveView 1.5
- SAP Sybase ESP
- Thomson Reuters TREP-RT
- Thomson Reuters Velocity Analytics (ODBC Drivers)
- One Market Data OneTick & OneTick CEP
- IBM Cognos TM1
- Perfmon
- JMX

SAP Sybase ESP, and JMS

For SAP Sybase ESP, and JMS message buses, copy the appropriate (32/64-bit) .NET PubSub Libraries to the Datawatch Designer Plugins folder.

This is available by default at either:

Designer & OS	Path
32-bit on 32-bit	`C:\Program Files\Panopticon\EX\Plugins`
64-bit on 64-bit	`C:\Program Files\Panopticon\EX\Plugins`
32-bit on 64-bit	`C:\Program Files (x86)\Panopticon\EX\Plugins`

Thomson Reuters TREP–RT

For Thomson Reuters TREP-RT, retrieve the .NET RFA libraries and follow the instructions of copying the files to the Datawatch Designer installation folders.

StreamBase 7.1

For StreamBase 7.1, either install the full StreamBase CEP 7.1 client or the StreamBase 7.1 .NET Client Redistributable. If no StreamBase model development is to occur on the machine, install the .NET client redistributable, that is appropriate for the Designer installed (32-bit or 64-bit).

Example:

- Streamabse-.NET-client-redist-7.1.12.1_1211191613.msi (32-bit)
- StreamBase-.NET-Win64-client-redist-7.1.12.1_1211191613.msi (64-bit)

Streambase software can be downloaded from: http://download.streambase.com/

StreamBase LiveView 1.5

For StreamBase LiveView 1.5, two files are required:

- Streambase 7.3 .NET Client
- Streambase LiveView 1.5 API

Manually copy the required version of: `StreamBase.SB.Client.dll`

Which is found in the Streambase bin or bin64 folders.

Example:

`C:\Program Files (x86)\StreamBase Systems\StreamBase.7.3\bin` (32-bit)

`C:\Program Files (x86)\StreamBase Systems\StreamBase.7.3\bin64` (64-bit)

To the appropriate Datawatch Designer Plugins folder, which is available by default at either:

Designer & OS	Path
32-bit on 32-bit	C:\Program Files\Panopticon\EX\Plugins
64-bit on 64-bit	C:\Program Files\Panopticon\EX\Plugins
32-bit on 64-bit	C:\Program Files (x86)\Panopticon\EX\Plugins

Then manually copy: `StreamBase.LiveView.API.dll`

Which is found in the LiveView 1.5 SDK Bin folder.

Example:

`C:\Program Files (x86)\StreamBase Systems\StreamBase.7.3\liveview\sdk\bin`

To the appropriate Datawatch Designer Plugins folder.

OneTick

Connectivity to OneTick has changed in the Designer & .NET Server since 6.3.1 to be through the C# API, rather than through ODBC.

As a consequence the ODBC driver is no longer required, but the installations of the OneTick client published after 17th June 2013 plus the following are prerequisites.

For OneTick, manually copy specific dependency files from the OneTick installation. (e.g., `C:\omd\one_market_data\one_tick\bin`) to the Datawatch Desktop Plugins folder.

This is available by default at either:

Designer & OS	Path
32-bit on 32-bit	C:\Program Files\Panopticon\EX\Plugins
64-bit on 64-bit	C:\Program Files\Panopticon\EX\Plugins
32-bit on 64-bit	C:\Program Files (x86)\Panopticon\EX\Plugins

The specific files to be copied are:

- Csomd.dll
- Csomd_native.dll
- Libonetick.dll

Additionally the following files are required for streaming continuous query support:

- msvcp100.dll
- msvcr100.dll

The OneTick connector also requires that the environment variable: **ONE_TICK_CONFIG**

Has been configured with the path to the required config file.

Example:

`C:\omd\client_data\config\one_tick_config.txt`

And that the OneTick configuration file has entries for Windows OS time zone mapping and information.

Example:

```
WINDOWS_TZ_MAPPING_FILE="C:/OMD/one_market_data/one_tick/config/windows_tz_
mapping.dat"
WINDOWS_ZONEINFO_PATH="C:/OMD/one_market_data/one_tick/config/zoneinfo"
```

IBM Cognos TM1

For IBM Cognos TM1, copy the following (32/64-bit) .NET Libraries

- Applix.TM1.API.dll
- Applix.TM1.AIP.SSPI.dll

To the Datawatch Designer Plugins folder. This is available by default at either:

Designer & OS	Path
32-bit on 32-bit	`C:\Program Files\Panopticon\EX\Plugins`
64-bit on 64-bit	`C:\Program Files\Panopticon\EX\Plugins`
32-bit on 64-bit	`C:\Program Files (x86)\Panopticon\EX\Plugins`

These TM1 libraries are found within the TM1 installation under Program Files.

PERFMON

To access performance counters in the network, the domain user, who is running Designer, must be added to the *Performance Monitor Users* group on these computers.

Go to **Control Panel > All Control Panel Items > Administrative Tools > Computer Management** then under *System Tools*, select **Local Users and Groups > Groups**.

Find Performance Monitor Users group and open its properties.

Click **Add** and add the domain user who will need to access the performance counters.

To make the local performance counters accessible from the IIS server, add the IIS AppPool user (IIS APPPOOL\[ApplicationPoolName] by default) to Performance Monitor Users.

JMX

Use the following java options to enable JMX monitoring for JMX plugin:

Enable JMX remote connection: (`-Dcom.sun.management.jmxremote`)

Disable JMX authentication: (`- Dcom.sun.management.jmxremote.authenticate=false`)
Note: This is not supported for now.

Set remote port for jmx: (`-Dcom.sun.management.jmxremote.port=number`)

Other Connectors

Additionally the following connectors will only be available for use if the appropriate ODBC/OLEDB drivers and client have been installed:

- Thomson Reuters Velocity Analytics (Firebird ODBC Driver)

R & Python Transform Support

R and Python connectivity and transforms occur over TCP/IP network links.

- For R, R Serve is used.
- For Python, Pyro (Python Remote Data Objects) is used.

R Integration

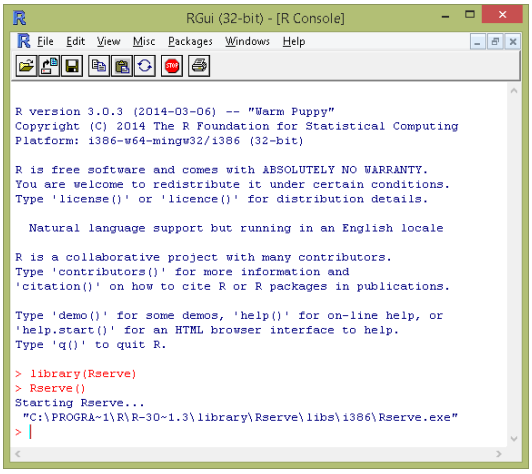
Follow the steps below to enable R connectivity.

Steps:

1. Download R, install it, and the R Console (http://cran.rstudio.com/)
2. Open the R Console.
3. Install Rserve using the following command from within the R Console:
   `install.packages("Rserve")`
4. Initiatiate the R Serve library using the following command:
   `library(Rserve)`
5. Run R Serve by executing the following command:
   `Rserve()`

Only 2, 4 & 5 need to be repeated when R connectivity is required.

Example:



NOTE Connectivity by default is over Port **6311**

To enable authentication across the R Serve TCP/IP link

- create a password file (pwdfile.pwd)

  Each line of the file should have the user and then the password.

  Example:

  ```
  user1 password1
  user2 password2
  ```

- Create a configuration file with following parameters (rconfig.conf)

  ```
  auth required
  pwdfile [path of password file]
  ```

  Example:

  ```
  remote enable
  auth required
  port 6311
  pwdfile C:\\RIntegration\\pwdfile.pwd
  ```

- load the created configuration file (the default R Serve configuration file is still loaded, but its settings have lower priority) and run Rserve:

  ```
  Rserve(args="--RS-conf [path of configuration file]")
  ```

  Example:

  ```
  Rserve(args="--RS-conf C:\\RIntegration\\rconfig.conf")
  ```

Python Integration

Follow the steps below to enable Python connectivity.

Steps:

1. Download and install Python 2.7

   (https://www.python.org/downloads/release/python-278/)
2. Add Python installation folder to your PATH environment variable.
3. Download Pyro 4.25 (NOT any later version).
4. From the command prompt, navigate to the Pyro install, and run:

   ```
   python setup.py install
   ```
5. Pyro is now installed into the Python site packages, typically at: `C:\Python27\Lib\site-packages\Pyro4`
6. Overwrite configuration.py with that supplied, or alternatively edit the file changing the lines:

   From: `self.SERIALIZER = "serpent"`
   To `self.SERIALIZER = "pickle"`

   From: `self.SERIALIZERS_ACCEPTED = "serpent,marshal,json"`
   To: `self.SERIALIZERS_ACCEPTED = "pickle,marshal,json"`

   From: `self.HMAC_KEY = None`
   To: `self.HMAC_KEY = "[Your Password]"`

   In the shipped example workbook, and the supplied configuration.py the self.HMAC_KEY is set to **password**
7. Run the supplied Batch File. **start_Python_connectivity.bat**

   This includes the following commands:

   ```
   @echo on
   start python -m Pyro4.naming
   ping localhost
   cd "%~dp0"
   python pyro.py
   ```

   Only 7, needs to be repeated when Python connectivity is required.

NOTE

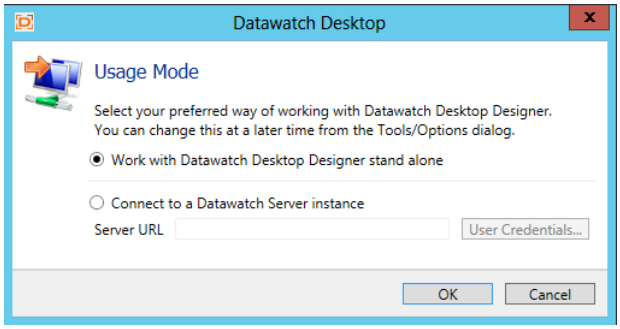
Connectivity by default is over Port **9090**, and requires a password as entered in the Pyro **configuration**.py

Running Datawatch Designer for the First Time

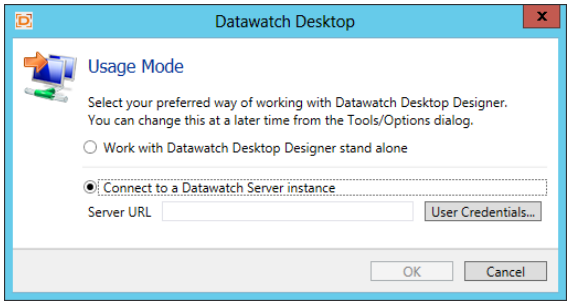
Steps:

1. You can select either, depending on your Desktop Environment, from the Start Menu in Windows:
   - 32-bit: Datawatch Desktop > Designer 32-bit > Designer x86
   - 64-bit: Datawatch Desktop > Designer 64-bit > Designer x64

   The *Usage Mode* dialog will appear:



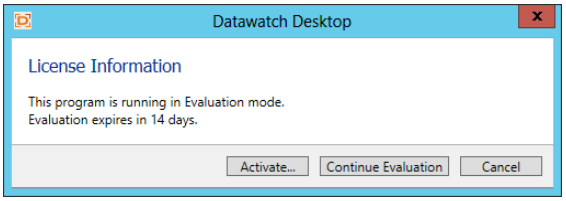
   If you are running the Designer against a pre-installed Datawatch Server - Visualization Edition, just enter the server URL and click **OK**.



2. If you plan to run Designer without the Server component:

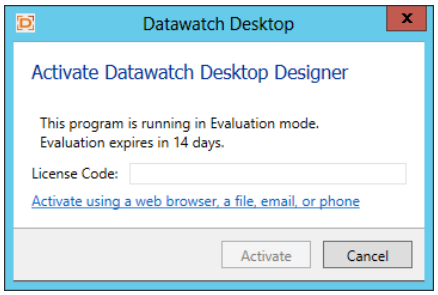
   2.1 Select **Work with Designer stand alone**

   The License Information dialog is displayed.



   2.2 If during the evaluation period click **Continue Evaluation** to continue.

   2.3 Alternatively to add the license, click **Activate.**

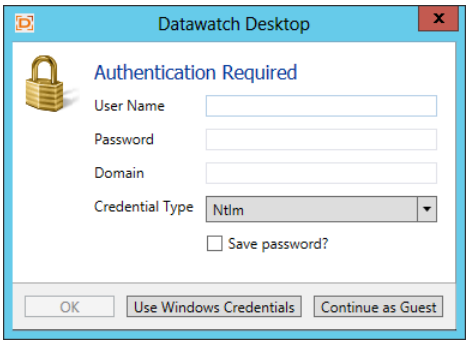


2.4 Enter the provided license code, and ensure you have an enabled Internet connection, as the license is validated against a central license server.

2.5 Click **Activate**, to confirm the entered license code.

Click **OK** to Start the Designer.

3. If you choose to **Connect to a Datawatch Server Instance**, the following dialog may be displayed:



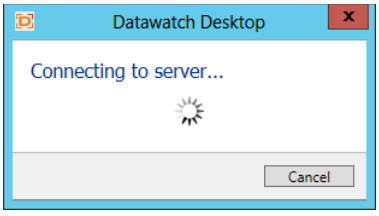
Enter the *Username*, *Password* and *Domain* of the Server you are connecting to. Check the *Save Password* box if you want to save the password.

For connectivity to a Server for Java instance, the Credential Type should be set to **Basic**.

For connectivity to a Server for .NET instance, the Credential Type should be set to **Ntlm**, or the **Use Windows Credentials** button should be clicked.

Click **Continue as Guest** if you want to use Designer as a guest.

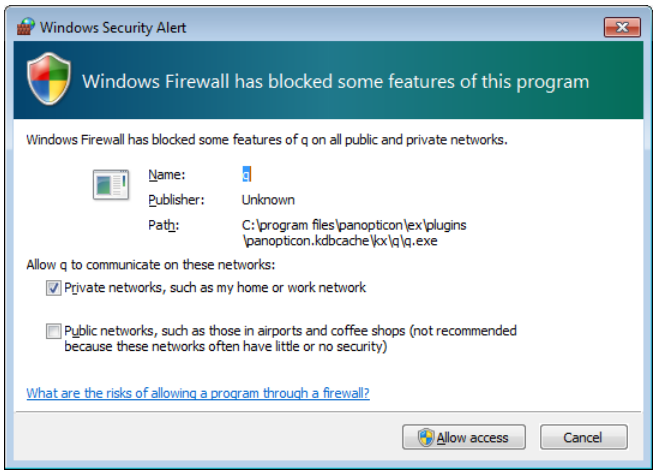
The *Connecting to Server* dialog displays.

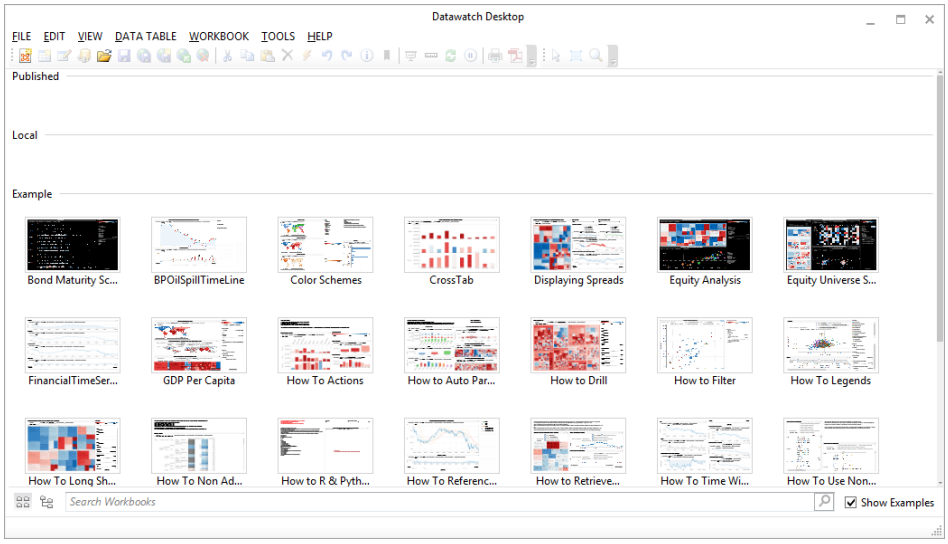


The Designer is displayed with the list of available workbooks.

4. If you are using the kdb+ cache option, the kdb+ cache will be initialized, and communication between the Designer and kdb+ cache will occur over TCP/IP via a pre-defined port, normally 10501.

When prompted by your firewall, **Allow access** to q.exe; the kdb+ cache process.





Starting with version 12.5, the Designer will only initially display the following sections:

- Menu Bar
- Toolbar icons
- List of available workbooks (Published, Local, and Examples)

Refer to the *Designer Reference Guide* for more information.

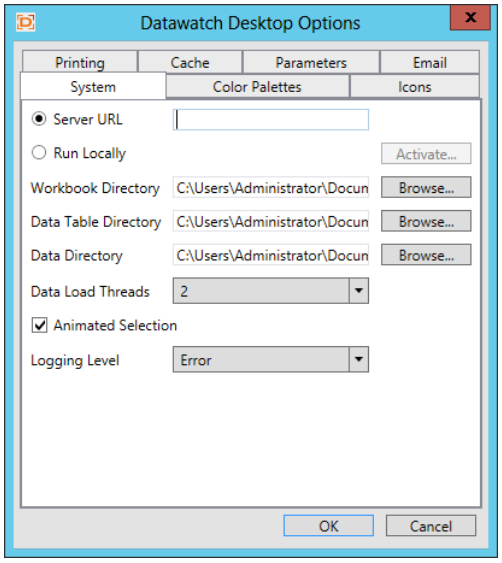
CHANGING THE USAGE MODE

To change from Standalone usage mode to connecting to a Datawatch Server – Visualization Edition instance, or vice versa, you can do this from the **Tools > Options**.

Steps:

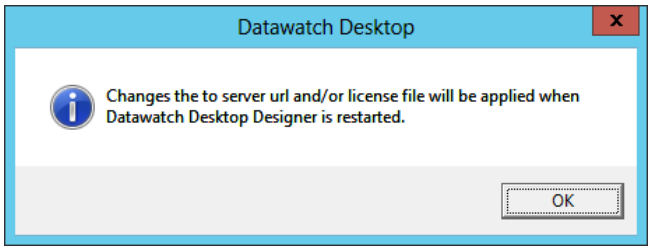
1. Select **Tools >Options** on the menu bar.

   The *Datawatch Desktop Options* dialog box displays.



2. You can select either:
   - **Server URL** and enter the URL of the Datawatch Server – Visualization Edition that you will connect to, or
   - **Run Locally** then perform steps 2.3 to 2.5 in *Running Datawatch Designer For the First Time* if you want to activate, otherwise just proceed to step 3.
3. Click **OK**.

   A message box displays.



4. Click **OK**.
5. Select **File > Exit** to close Designer and apply the changes.

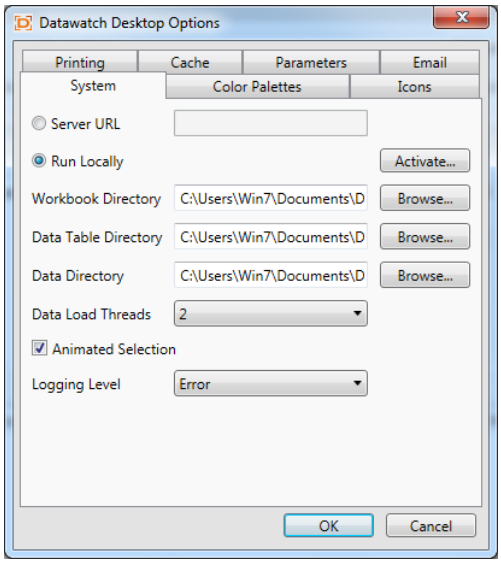
Setting up LocalDB as the Caching Option

Starting with Designer 12.4.2, local installation of LocalDB is no longer done automatically. Instead, KDB+ cache option has now become the default as it is the preferred option for performance and simpler deployments. However, for those who prefer to run the LocalDB as a caching option, it can be downloaded free from Microsoft.

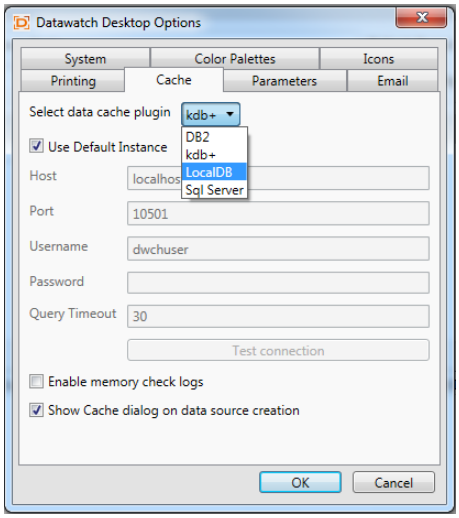
Steps:

1. Register and download LocalDB (SqlLocalDB) from the Microsoft site:

   http://msdn.microsoft.com/en-us/evalcenter/dn434042.aspx
2. Install SQLLocalDB.
3. Run Designer and go to **Tools > Options** to open the Options dialog.



4. Click the **Cache** tab and select **LocalDB** as the data cache plugin.


Datawatch Desktop Options
System
Color Palettes
Icons
Printing
Cache
Parameters
Email
Select data cache plugin
kdb+
DB2
kdb+
LocalDB
Sql Server
Use Default Instance
Host
localhos
Port
10501
Username
dwchuser
Password
Query Timeout
30
Test connection
Enable memory check logs
Show Cache dialog on data source creation
OK
Cancel

5. Click **OK**.

Upgrading Datawatch Designer

A previously installed Designer can be upgraded to the latest version through any of the following options:

- Upgrading
- Uninstalling and Re-Installing
- Silent Uninstalling and Re-Installing

UPGRADING

Simply install the latest release as defined earlier. This will update the existing software installation.

This capability is only available when the version number changes, and consequently may not be available for customer specific builds.

IMPORTANT A new major release of Designer may require a new license key to be activated when used on a stand-alone basis.

UNINSTALLING AND RE-INSTALLING

Steps:

1. Select **Control Panel > Programs & Features**.
2. Select the **Datawatch Designer** from the listing of installed programs and select **Uninstall**.
3. Then install the latest release as defined previously.

SILENT UNINSTALLING AND RE-INSTALLING

Steps:

1. Run the following command line on the command prompt:

   ```
   msiexec /x c:\temp\DatawatchDesignerx86.msi /qb /L*
   c:\temp\Designerx86install.log
   ```

   Where:

   - /x

     This option uninstalls the program.

   - /qb

     This option displays the uninstall progress bar. To suppress displaying the uninstall progress bar, replace **/qb** with **/qn**.

2. Then install the latest release as defined previously.

Resolving Installation Issues

Issues are investigated and resolved through investigation and controlled reproduction. A number of known issues are included in the next section and predominately relate to problematic installations of the MS .NET Framework and incorrect permissioning.

If you experience an unknown issue, send complete details to: support@datawatch.com

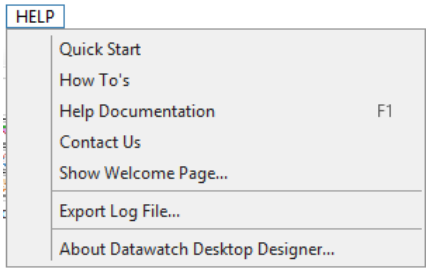
Be sure to send this important information to Datawatch Support in the event of a problem:

DATAWATCH DESIGNER LOG

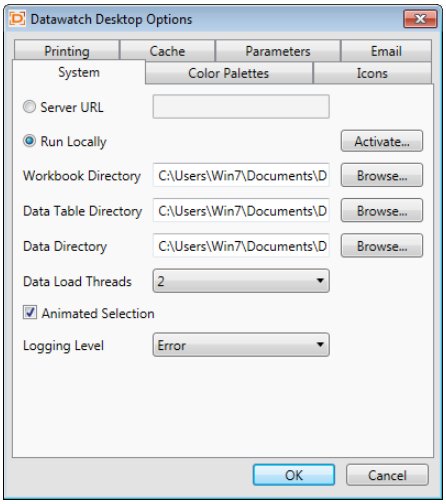
This is created under the user's profile within the Application Data folder (the `AppData\Roaming` folder in Vista & Windows 7/8) using this folder structure:

`%APPDATA%\Panopticon\EX\Log.txt`

Access this log file through the Designer menu using the **Help/Export Log File** menu item:



The level of detail for this log can be specified using the Designer menu **Tools – Options.**



By default it is set to **Error**, while the most verbose is **Info**.

Include your Designer Workbook & associated data sources if the issue is specific to a particular Workbook.

[Known Issues]

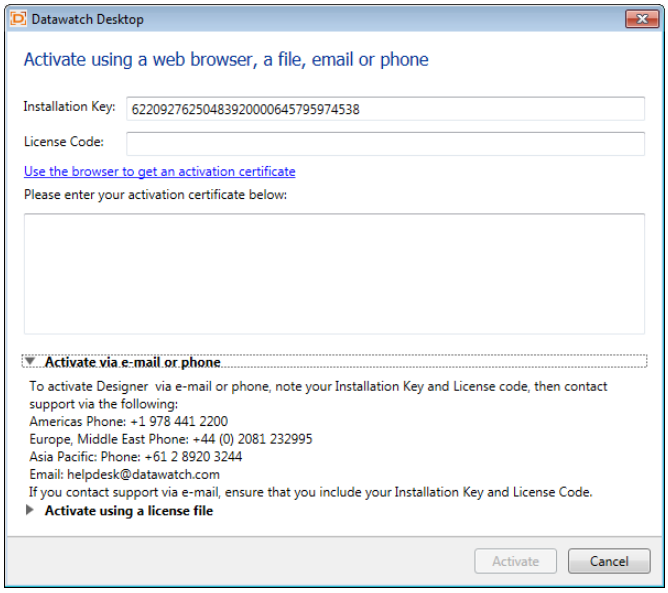
Activation Failed – Unknown Error [–77]

This is typically because direct access to the Internet based license server is blocked.

Click on the link **Activate using a web browser, a file, email or phone**.

Then either Activate via phone or email, or:

1. Click on the link Use the browser to get an activation certificate.



2. Enter the installation key and license code into the web page, and click **Generate Unlock Code Certificate.**

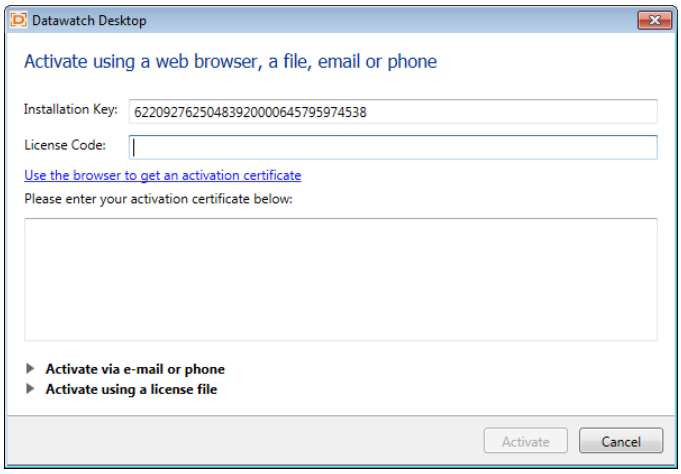
3. Paste this certificate back into the open section, and click **Activate.**

Activation Failed – Insufficient Privileges to start the service

The licensing service used by Designer has failed to start.

To activate the product without this service:

1. Click on the link **Activate using a web browser, a file, email or phone**.
2. Click on the option **Activate using a license file**



3. Click **Browse...,** and select the supplied license XML file.
4. Click **Activate.**

Authorized Using a Standalone License File. License File Invalid

This typically occurs where authorization was previously set to use a standalone license file, and the file has since been moved, so that it is no longer available.

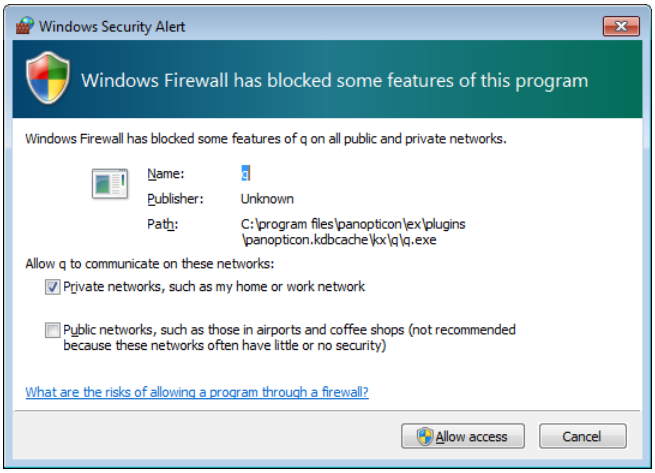
Steps:

1. Click on the link **Activate using a web browser, a file, email or phone**.
2. Click on the option **Activate using a license file.**
3. Click **Browse...,** and select the supplied license XML file.
4. Click **Activate.**

Windows Firewall has blocked some features of this program

If you are using the kdb+ cache option, the kdb+ cache will be initialized, and communication between the Designer and kdb+ cache will occur over TCP/IP via a pre-defined port, normally 10501.

If prompted by your firewall, **Allow access** to q.exe; the kdb+ cache process.



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