

DataFlux Web Studio Installation and Configuration Guide



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DataFlux Web Studio

Installation and Configuration Guide

Version 2.2

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Java Toolkit

This product includes the Web Services Description Language for Java Toolkit 1.5.1 (WSDL4J). The WSDL4J binary code is located in the file `wsdl4j.jar`.

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Introduction

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Accessibility Features

DataFlux Web Studio (Web Studio) includes features that improve usability of the product for users with disabilities. These features are related to accessibility standards for electronic information technology that were adopted by the United States (U.S.) Government under Section 508 of the U.S. Rehabilitation Act of 1973, as amended.

If you have questions or concerns about the accessibility of DataFlux products, send an e-mail to techsupport@dataflux.com.

Audience for this Guide

This guide is intended for those who are responsible for installing and configuring Dashboard Viewer, Monitor Viewer, Business Data Network, or Reference Data Manager.

Conventions Used In This Document

This document uses several conventions for special terms and actions.

Typographical Conventions

The following typographical conventions may be used in this document:

Bold	Text in bold signifies a button or action
<i>italic</i>	Identifies document and topic titles
monospace	Typeface used to indicate examples of code

Syntax Conventions

The following syntax conventions may be used in this document:

- [] Brackets [] are used to indicate variable text, such as version numbers
- # The pound # sign at the beginning of example code indicates a comment that is not part of the code

DataFlux Reference Publications

This document might reference other DataFlux® publications including:

- *DataFlux Web Studio User's Guide*
- *DataFlux Data Management Studio User's Guide*
- *DataFlux Data Management Studio Installation and Configuration Guide*
- *DataFlux Authentication Server Administrator's Guide*
- *DataFlux Authentication Server User's Guide*
- *DataFlux Data Management Server Administrator's Guide*
- *DataFlux Data Management Server User's Guide*
- *DataFlux Expression Language Reference Guide for Data Management Studio*
- *DataFlux Federation Server Administrator's Guide*
- *DataFlux Federation Server User's Guide*
- *DataFlux Migration Guide*
- DataFlux Quality Knowledge Base Online Help

Introduction to Web Studio

[Overview of Web Studio](#)

[Prerequisites for Web Studio](#)

Overview of Web Studio

DataFlux Web Studio (Web Studio) is a web client that can include all of the following modules or a combination of them:

DataFlux Dashboard Viewer - Executives and other key decision-makers can use Dashboard Viewer to get a high-level summary of data stewardship efforts. Exceptions to monitored business rules are generated by data monitoring jobs that are created in Data Management Studio. The output of these jobs can be monitored in Web Studio, using Monitor Viewer and Dashboard Viewer.

DataFlux Monitor Viewer - Data stewards can use Monitor Viewer to get a detailed view of the exceptions to monitored business rules. They can drill deeper into the exceptions that are displayed in the Dashboard Viewer. Data stewards can also evaluate exceptions and assign related work to the appropriate technical personnel. Technical personnel will typically have access to Data Management Studio, and they can see and respond to the assignments made from Monitor Viewer in Web Studio.

DataFlux Business Data Network - Business Data Network enables you to discover, document, and manage a glossary of business terms. The record for a term can include a definition of the term; the relationship of the term to other terms; and the relationship of the term to other content such as documents, web pages, tables, and business rules. After the glossary is complete, you can use the discovery capabilities of the Data Management Platform to diagnose problems that are related to these terms. Depending on the nature of the problems detected, other Data Management Platform capabilities such as standardization, matching, and enrichment can be used to solve data problems on an ongoing basis. The monitoring and reporting capabilities of the Platform offer a way to verify the results of your effort to manage the terms and their related assets.

DataFlux Reference Data Manager - Reference Data Manager enables you to manage a central repository of reference information that can be used by technical, business, and IT users. Examples of reference information include a list of NASDAQ stock symbols with their associated company names, or a list of valid zip codes with their associated cities and states. The Reference Data Manager repository can be centrally managed and versioned; it can be based on business terms defined in Business Data Network; it can be exported to external systems; and it can be used to manage hierarchies in the DataFlux Quality Master Data Management Solution (qMDM) and other DataFlux software.



Note: In order to use the Web Studio modules that are described above, Web Studio and the separate modules must be licensed on the relevant server. For more information about licensing, contact your DataFlux representative.

Prerequisites for Web Studio

Web Studio Software

The following software is included with DataFlux Web Studio:

DataFlux Web Studio Server 2.2. This is a DataFlux Data Management Server that is configured to support the Web Studio client. The Web Studio Server runs the jobs that support all of the modules in the Web Studio client.

DataFlux Web Studio 2.2. You will install the Web Studio client on the Web Studio Server. This ensures that the appropriate jobs will be installed on the Web Studio Server. Then you will deploy the Web Studio client to a computer where an Apache Tomcat web server or JBoss web server is installed. This would typically be a separate computer. You will also install the Web Studio client on any Data Management Servers that you want to monitor with Monitor Viewer or Dashboard Viewer, to ensure the appropriate jobs are also on those servers.

Software Required by Web Studio

The following software is required by Web Studio. If you do not already have this software, you will need to install and configure this software as described in this guide.

Web server software (Apache Tomcat 6.0.33 or higher. Or JBoss 5.1x and 6.0x). The Web Studio client will run on the computer where the Apache or JBoss web server is installed. For best performance, the web server software should run on a separate computer from the Web Studio Server.

DataFlux Authentication Server 2.1. You cannot log in to Web Studio unless you are registered on the Authentication Server.

DataFlux Data Management Studio 2.2. All Web Studio modules require a Data Management Platform repository. Only Data Management Studio can create the repository definition file (.RCF file) and create a new repository in the location that is specified in the definition file. Also, Dashboard Viewer, Monitor Viewer, and Business Data Network depend on components in Data Management Studio.

Database Management System Software (for repository storage). The Data Management Platform repository for Web Studio must use an ODBC DSN connection, and it must be in one of the following database formats:

- Oracle 11g R1, R2 (11.1, 11.2)
- Oracle 10g R1, R2 (10.1, 10.2)
- Microsoft SQL Server 2008 R1, R2
- Microsoft SQL Server 2005
- DB2 V9.1, V9.5, V9.7 for Linux, UNIX, Windows

Java 1.6 or higher. Must be specified in the PATH environment variable on the computer where the web server (Apache or JBoss) and the Web Studio client are running.

Web browser (for Web Studio users). Microsoft Internet Explorer versions 7 or 8. Mozilla Firefox versions 3.6x or 6.0x. Google Chrome.

Adobe Flash 10.1 (for Web Studio users). If Adobe Flash is not already installed, you will be prompted to install it onto any web browser that attempts to run Web Studio.

Web Studio Licensing

Web Studio and the separate modules (Business Data Network, etc.) must be licensed on the relevant server. For more information about licensing, contact your DataFlux representative.

Installing and Configuring Web Studio

[Installing Web Studio and Related Software](#)
[Configuring Business Data Network](#)
[Configuring Reference Data Manager](#)
[Configuring Dashboard Viewer and Monitor Viewer](#)
[Updating Web Studio Configuration Files](#)

Installing Web Studio and Related Software

Overview

This topic lists the servers that are required to support Web Studio and refers you to the appropriate installation instructions. It also describes how to run the Web Studio installation wizard on the Web Studio Server. It is assumed that you have access to all of the software that is described in [Prerequisites for Web Studio](#).

Install an Authentication Server

Install **DataFlux Authentication Server 2.1** if you do not already have an instance of this server that is available to support Web Studio. For information about installing this server, see the *DataFlux Authentication Server Administrator's Guide*.

Install Data Management Studio

Install **DataFlux Data Management Studio 2.2** if you do not already have an instance of this application that is available to support Web Studio. For information about installing this application, see the *DataFlux Data Management Studio Installation and Configuration Guide*.

Install a Web Server (Apache Tomcat or JBoss)

Install a web server, either Apache Tomcat 6.0.33 or higher; or JBoss 5.1x and 6.0x. For best performance, the web server software (Apache Tomcat or JBoss) should run on a separate computer from the Web Studio Server. For information about downloading and installing these servers, see their respective web sites (tomcat.apache.org or jboss.org).

Install the Web Studio Server

The Web Studio Server is a DataFlux Data Management Server 2.2 that is configured to support the Web Studio client. Accordingly, for information about installing this server, see the *DataFlux Data Management Server Administrator's Guide*.

Secure the Web Studio Server

You should secure the Web Studio Server before installing the Web Studio client, so that the installation process can set the location of the Authentication Server for Web Studio.

In order to secure the Web Studio Server, update the `dmserver.cfg` file, which is located in the `DM_SERVER_HOME/etc/` folder. Add the following lines to that file, replacing the variable with your Authentication Server domain:

```
dmserver/secure = yes
dmserver/secure/grp_admin = DMS_ADMINS
base/auth_server_loc = iom://auth_srvr_location.domain.com:21030
```

Stop and start the Web Studio Server to apply changes to that server.

Install Web Studio on the Web Studio Server

The Web Studio installation wizard installs a web application archive file (WAR file) to a folder in the Web Studio Server home directory. It also installs a set of job files for the Web Studio modules that you select in the wizard. The modules rely on these jobs. They will not work without them.

Perform the following steps on the computer where the Web Studio Server is installed.

1. Go to the downloads section of MyDataFlux Portal on the DataFlux® website.
2. Find the DataFlux Data Management Server section and download the Web Studio installation wizard.
3. Run the installation wizard on the Web Studio Server.
4. On the first page of the wizard, verify that the installation path to the Web Studio Server is correct. Then click **Next**.
5. On the second page of the wizard, select the checkboxes for all modules that you will license. Click **Next**. The Web Studio WAR file and the job files are copied to the appropriate folders.

The `webstudio.war` file is installed in the `share\web` folder of the Web Studio Server directory.

A set of job files for the modules that you selected are installed in the following folders in the Web Studio Server home directory. Depending on which modules that you install, you will see some combination of the following folders:

- the `var\Batch_jobs` folder contains the `BusinessData` and/or `ReferenceData` folders
- the `var\Data_services` folder contains the `BusinessData`, `Lineage`, `Monitor`, and/or `ReferenceData` folders
- the `var\Process_services` folder contains jobs in the `BusinessData` and/or `Monitor` folders

- the `share\web` folder contains backup copies of the original jobs and services
- the `share\web\sample_data` folder contains a set of sample import files for Reference Data Manager

Business Data Network installs jobs in the `BusinessData` and `Lineage` folders. Reference Data Manager installs jobs in the `ReferenceData` folders. Monitor Viewer and Dashboard Viewer install jobs in the `Monitor` folder.

The wizard also installs an update tool in the Web Studio Server home directory. For more information, see [Updating Web Studio Configuration Files](#).

Next Tasks

After you have installed Web Studio, the next task is to configure the servers and modules that you selected to install. For more information, see the following topics:

- [Configuring Business Data Network](#)
- [Configuring Reference Data Manager](#)
- [Configuring Dashboard Viewer and Monitor Viewer](#)

Configuring Business Data Network

Overview

After you complete the tasks that are described in [Installing Web Studio and Related Software](#), then you are ready to configure the Web Studio modules that you selected to install. This topic describes how to configure Business Data Network.

Perform the following tasks in the order presented.

- [Create the Web Studio Repository](#)
- [Enable the Web Studio Server to Access the Repository](#)
- [Add Required Users and Groups on the Authentication Server](#)
- [Grant Access to Business Data Network Jobs](#)
- [Register the Web Studio Server as a Business Data Server](#)
- [Add Users on the Business Data Server](#)
- [Verify the Web Studio Configuration File](#)
- [Deploy Web Studio to the Apache Tomcat or JBoss Web Server](#)
- [Access Web Studio](#)

Create the Web Studio Repository

A repository is a collection of metadata about DataFlux objects and related resources. All Web Studio modules require a repository. In general, you will do the following:

- Review the storage requirements for repositories as described in [Database Management System Software \(for repository storage\)](#).
- Identify the appropriate database and schema for the Business Data Network repository.
- Use Data Management Studio to create a system DSN connection for the repository. Be sure to save credentials with the connection. For more information, see the "Data Connections" chapter in the *DataFlux Data Management Studio User's Guide*.
- Use Data Management Studio to create a repository definition file (.RCF file) and to create a new repository in the location that is specified in the definition file.
- Copy the repository definition file from the Data Management Studio location to the appropriate folder on the Web Studio Server.

After you create a DSN connection for the repository, the steps for creating the repository and copying the repository definition file to the appropriate folder on the Web Studio Server are as follows:

1. Start Data Management Studio.
2. Click on the **Administration** riser bar.
3. In the **Repository Definitions** pane, click on the **New** button to create the new repository definition file.
4. The New Repository Definition dialog appears. Enter the name of your repository in the **Name** field.
5. In the **Data storage** section of the dialog, typically you will specify a **Database connection** (DSN connection) for your new repository. The DSN connection must have been created earlier. It should be a system DSN, and you should have saved credentials with the connection. For more information, see the "Data Connections" chapter in the *DataFlux Data Management Studio User's Guide*.
6. If you want to have multiple repositories defined in the same database, consider adding a unique prefix in the **Table prefix** field. A unique table prefix would enable you to identify the tables that are associated with a particular repository.




Note: If the DBMS for your repository is in Oracle format, then you must use an upper case prefix. In general, use only a-z, A-Z, 0-9, and the underscore as characters for a table prefix. A period is also acceptable if it is used as a separator between a schema name and the table prefix.

7. Skip the **File storage** location. It is not used on a server.
8. Leave the defaults for the **Connect to repository at startup** checkbox and the **Private** checkbox.

9. Click on the **OK** button. A new repository definition file (.RCF file) will be created in a subfolder called `DataFlux\DataManagement\2.2\repositories`. This folder is in the user settings area, such as `C:\Users\user_name\AppData\Roaming` under Windows 7. A new repository will be created in the location that is specified in the **Data storage** field of the definition file. You will be connected to the new repository.
10. To verify that you are connected to the repository, select the repository in the **Administration** riser bar. The Status pane should indicate that you are connected to the repository.

At this point, a repository definition file (.RCF file) has been created in the user settings area or in the `etc/repositories` folder in the Data Management Studio home directory. In order for Web Studio to find the repository that is specified in this repository definition file, you must copy the repository definition file from the Data Management Studio location to the appropriate folder on the Web Studio Server that runs Business Data Network jobs.

 **Note:** A Data Management Server, such as a Web Studio Server, should have only one repository definition file (.RCF file) in its repository folder. Accordingly, before copying the repository definition file from Data Management Studio to the server, you should rename any existing repository definition files on the server so that they do not have an .RCF extension.

A Data Management Server stores .RCF files in the program files area:

```
SERVER_HOME\etc\repositories\Repository_Name.RCF
```

Go to this folder on the Web Studio Server and rename any existing repository definition files so that they do not have an .RCF extension. Then perform the following steps.

1. Copy the repository configuration file (.RCF file) from Data Management Studio. Data Management Studio stores .RCF files in the user settings area or in the `etc/repositories` folder in the home directory.
2. Upload the repository configuration file to the Web Studio Server, in the program files area:

```
SERVER_HOME\etc\repositories\Repository_Name.RCF
```

The next task is to enable the Web Studio Server to access the repository that is specified in the definition file.

Enable the Web Studio Server to Access the Repository

Verify That You Have a Local DSN for the Repository

After you complete the tasks in the previous section, you will have a repository definition file in a folder in the Web Server's home directory. This file uses an ODBC system DSN to point to a storage location for the repository. Here is an example of the connection line from a repository definition file:

```
<UnifiedRepositoryConnect>DSN=DataFlux Web  
Studio;DFXTYPE=ODBC</UnifiedRepositoryConnect>
```

In order for the Web Studio Server to use this definition, it must have a local DSN with the same name and database location as the DSN that is specified in the repository definition file. Perform the following steps to verify that the Web Studio Server has an appropriate local DSN in the ODBC Data Source Administrator.

These steps are appropriate for a Windows-based Web Studio Server. For details about adding data connections under UNIX, see the *DataFlux Data Management Server User's Guide*.

1. Inspect the repository configuration file that you uploaded to the Web Studio Server, in the program files area:

```
[SERVER_HOME]\etc\repositories\Repository_Name.RCF
```

2. Note the DSN that is specified in this file.
3. Display the ODBC Data Source Administrator. Under Windows, one way to do this is to select the **Start** menu and search for "odbc."
4. Verify that the Web Studio Server has an ODBC DSN with the same name and points to the same database location as the DSN that is specified in the repository definition file. If so, skip to [Specify the Repository DSN for the Web Studio Server](#). If not, then you must add a new DSN as described in Step 5.
5. Use the ODBC Data Source Administrator to add a DSN that uses the same DSN name and points to the same database location as the DSN that is specified in the repository definition file.



Note: If the Web Studio Server is a 64-bit Data Management Server, then you might have some additional steps, as described below.

In general, a 32-bit ODBC driver can access a database running in 64-bit mode, and a 64-bit ODBC driver can access a database running in 32-bit mode. Not all ODBC drivers are this versatile, however. In some cases, you might encounter the following scenario with Windows-based systems.

Data Management Studio is a 32-bit application. Accordingly, when you create an ODBC DSN connection in Data Management Studio, you will specify a 32-bit driver. (The Data Management Studio interface for ODBC connections always calls the 32-bit ODBC Data Source Administrator, even on a computer with a 64-bit version of Windows.)

The 32-bit driver will work if you use the connection in Data Management Studio. However, if the Web Studio Server is a 64-bit Data Management Server, the 32-bit DSN might fail to resolve when it is accessed by the server, because of an architecture mismatch between the 32-bit connection and the 64-bit server.

The remedy is to define a 64-bit connection on the Web Studio Server that uses the same DSN name and the same connection attributes as the 32-bit connection. Then, when you access the DSN on the Web Studio Server, the DSN name will reference the 64-bit connection, and the connection will succeed.

Register the Web Studio Server as a Data Management Server

The Web Studio Server is a Data Management Server that is configured to support Web Studio. In order to specify the repository DSN on the **Data Connections** tab for the Web Studio Server, you will go to the **Data Management Server** riser in Data Management Studio and add a connection for the Web Studio Server. This enables you to use the Data Management Server interface to perform certain kinds of maintenance on the Web Studio Server.

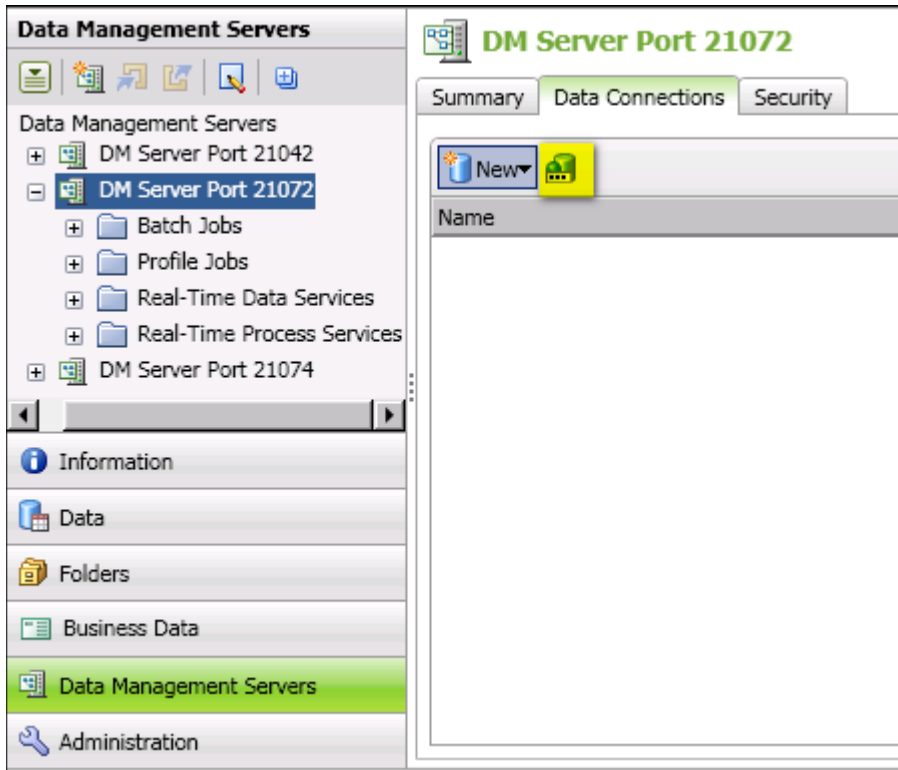
Perform the following steps:

1. In Data Management Studio, click the **Data Management Servers** riser. The Data Management Server panel displays.
2. In the server information pane on the right, click the **New Data Management Server** icon in the tool bar. The Data Management Server dialog displays.
3. Specify a **Name** (display name), **Server** (server name or IP address), and **Port** for the Web Studio Server.
4. Click **Test Connection** to verify your connection. Enter any required credentials.
5. If the connection is successful, click **OK** to save your changes.

Specify the Repository DSN for the Web Studio Server

The next task is to specify the repository DSN on the **Data Connections** tab for the Web Studio Server. The following steps assume that the Web Studio Server is available from the **Data Management Servers** riser in Data Management Studio.

1. Click the **Data Management Servers** riser in Data Management Studio.
2. In the server tree on the left, select the Web Studio Server, such as **DM Server Port 21072** in the next figure.

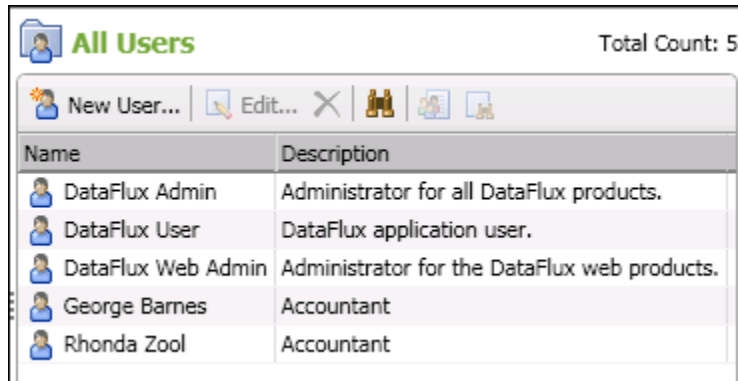


3. Click the **Data Connections** tab on the right.
4. Click the Manage ODBC Credentials icon, which is highlighted in the previous figure. The Manage ODBC Credentials dialog is displayed.
5. Click the New ODBC Credentials icon in the dialog. This icon is above the **Name** field in the dialog.
6. Add the DSN name from Steps 2 or 3 above, and add user credentials, if required.
7. Click OK twice to save the connection and close the credentials dialogs.
8. Stop and start the Web Studio Server to apply changes to that server. The Web Studio repository will now be available on the Web Studio Server.

Add Required Users and Groups on the Authentication Server

This section describes the Authentication Server users and groups that are required by Business Data Network. For an introduction to adding users on the Authentication Server, see the "Adding Authentication Server Domains and Users" topic in the *DataFlux Data Management Studio User's Guide*. For complete information about Authentication Server users and groups, see the *DataFlux Authentication Server User's Guide*.

A person must be a registered user on the Authentication Server in order to log on to Web Studio. Accordingly, a server administrator must add user definitions for all Web Studio users. The next figure shows some example users who have been registered on the Authentication Server.



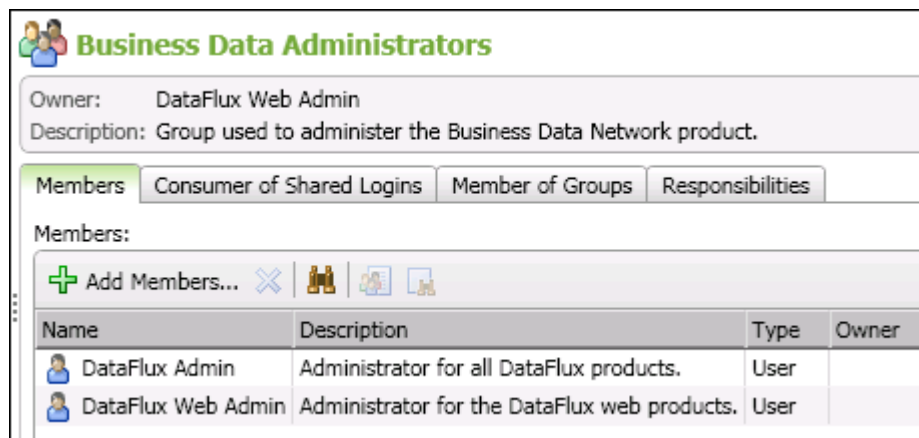
A server administrator must set up the following groups on the Authentication Server:

DMS_ADMINS - A group for Data Management Platform server administrators. The name of this group must match the name specified for the `grp_admin` group that is described in [Secure the Web Studio Server](#). Add at least one person to this group.

Business Data Administrators - A group for Business Data Network administrators, people who will access the Business Data Server in Data Management Studio and control various aspects of a Business Data Network glossary. The name of this group must be "Business Data Administrators." Add at least one person to this group.

(Optional) **Business Data Users** - A group for Business Data Network users, people who will use Business Data Network to add and maintain terms. The name for this optional group can be any convenient name. Eventually, regular users who maintain terms in the glossary could be added to this group.

The next figure shows an example Business Data Administrators group on the Authentication Server.



The next task is to select the Business Data Network jobs that were installed by the Web Studio wizard and enable the appropriate Authentication Server users or groups to access these jobs.

Grant Access to Business Data Network Jobs

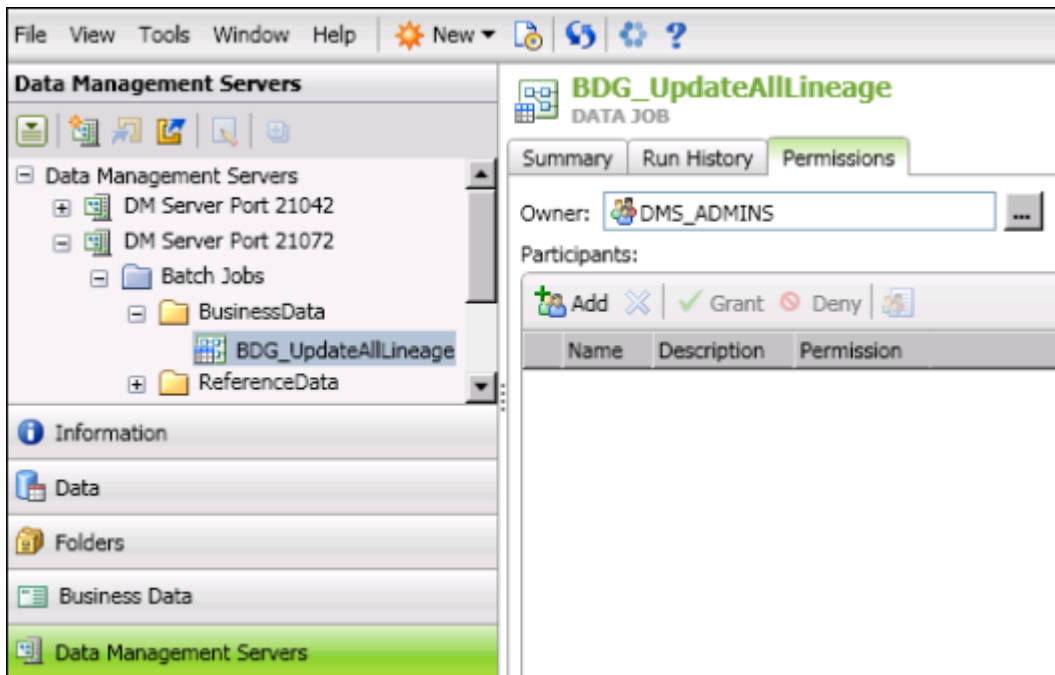
When you installed Business Data Network, you installed jobs in the following folders of the Web Studio Server:

- var\Batch_jobs\BusinessData folder
- the var\Data_services folder contains the BusinessData and Lineage folders
- var\Process_services\BusinessData folder

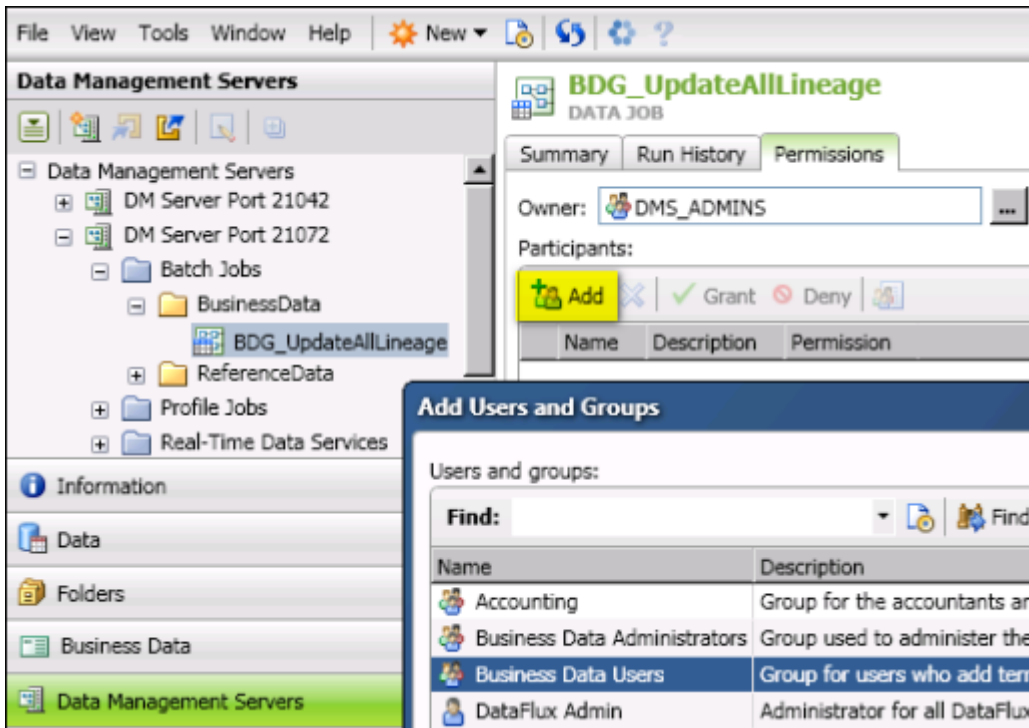
Anyone who uses Business Data Network must have access to run these jobs. Accordingly, after you have defined users and groups on the Authentication Server, you must enable them to access the jobs in the folders above. In general, you will access the Web Studio Server from the **Data Management Servers** riser in Data Management Studio. Then you will expand the folders above, select the jobs in the folder, and grant appropriate privileges to selected users and groups on the Authentication Server.

The following steps assume that the Web Studio Server is available from the **Data Management Servers** riser in Data Management Studio.

1. Click the **Data Management Servers** riser in Data Management Studio.
2. In the server tree on the left, select the Web Studio Server.
3. Expand a folder where you expect to find a Business Data Network job, based on the list above.
4. Select a job in the folder. The **Permissions** tab for that job displays, as shown in the next figure.



- Click **Add** in the **Permissions** tab. The **Add Users and Groups** dialog displays all of the users and groups that have been defined on the Authentication Server, as shown in the next figure.



- Select an appropriate user or group, such as the **Business Data Users** group in the previous figure.
- Click Add in the **Add Users and Groups** dialog to add the selected user or group. The user or group is added to the Permissions tab for the selected job.
- Repeat for all Business Data Network jobs.

The next task is to register the Web Studio Server as a Business Data Server in Data Management Studio.

Register the Web Studio Server as a Business Data Server

A Business Data Server is a Web Studio Server that is configured to support Business Data Network. Business Data Network users must connect to a Business Data Server in order to add or view terms. In Data Management Studio, server administrators will open the Business Data Server connections on the **Administration** riser to maintain roles, users, and term attributes. To support these tasks, you will go to the **Administration** riser in Data Management Studio, open the **Business Data Servers** folder and add a connection for the Web Studio Server. This enables you to use the Business Data Server interface to perform certain kinds of maintenance on the Web Studio Server.

Perform the following steps:

- In Data Management Studio, click the **Administration** riser.
- Select the **Business Data Servers** folder.

3. In the server information pane on the right, click the **New Business Data Server Connection** icon in the tool bar. The New Business Data Server Definition dialog displays.
4. Specify a **Name** (display name), **Server** (server name or IP address), and **Port** for the Web Studio Server.
5. If the current server will be your default Business Data Server, select **Set as default**. Otherwise, when you click the **Business Data** riser, you will get an error about a default server not being defined.
6. Click **Test Connection** to verify your connection. Enter any required credentials.
7. If the connection is successful, click **OK** to save your changes.

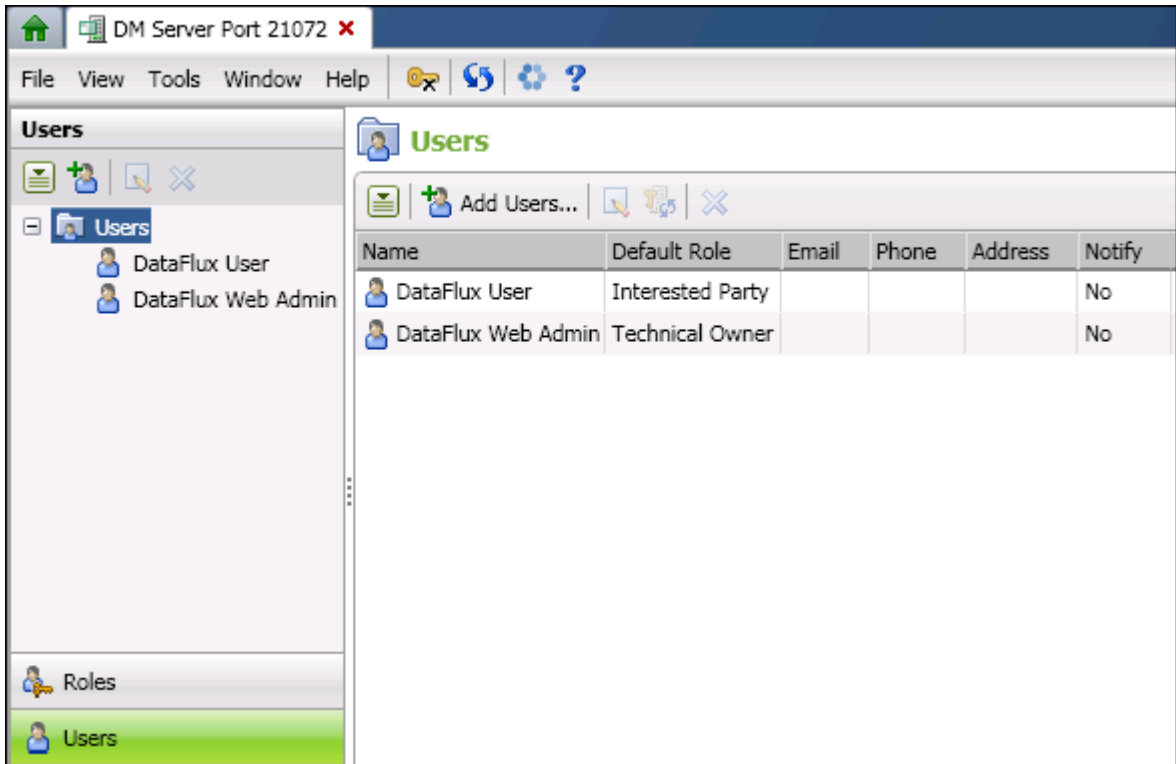
Add Required Users on the Business Data Server

In order to enable someone to add or update terms in a Business Data Network glossary:

- the person must be registered with the Authentication Server that is associated with the Business Data Server; this task is performed by the Authentication Server administrator, as described in [Add Required Users and Groups on the Authentication Server](#)
- the person must be listed in the **Users** panel of the **Business Data Server Administration** window, as described in this section.

If a person does not meet these criteria, they will at most have read-only access to a Business Data Network glossary. For the initial configuration of Business Data Network, you will add one or more users who should be given the ability to add and update terms in a glossary. It is assumed that you have already registered the Web Studio Server as a Business Data Server.

1. In Data Management Studio, click the **Administration** riser.
2. Expand the **Business Data Servers** folder.
3. Right-click the Business Data Server that corresponds to the Web Studio Server. Then select **Open**.
4. Click the **Users** riser. The **Users** tree and panel will display. The next figure shows two example user definitions.



5. Click the **Add User** icon in the right panel. The **Add Users** dialog displays a list of users who are registered with the Authentication Server.
6. Select one or more users who should be given the ability to add and update terms. Then click **Add**. The selected users will be added to the **Users** tree and panel.

To edit or delete a user, right-click the user in the Users tree on the left, then select **Edit** or **Delete**.

Verify the Web Studio Configuration File

Before you deploy Web Studio to the computer where it will run, verify that the following entries in its `web.xml` configuration file are correct. This file can be found in the following location on the Web Studio Server:

`WEB_STUDIO_SERVER_HOME/etc/web/WEB-INF/web.xml`

Confirm that the entry for **Web Studio Auth Server Address** points to the correct Authentication Server and that the port is correct. This should be the same Authentication Server that is referenced in the `dmserver.cfg` file for the Web Studio Server. (For more information about the `dmserver.cfg` file, see [Install and Secure the Web Studio Server.](#))

Confirm that the entry for **BDN DMS Server Address** points to the correct Web Studio server and that the port is correct.

If you need to make any updates to the `web.xml` file, make the updates, then run the Web Studio Update Tool to apply your changes. For more information, see [Updating Web Studio Configuration Files.](#)

Deploy Web Studio to the Apache Tomcat or JBoss Web Server

The Web Studio installation wizard installs a web application archive file (WAR file) to a folder in the Web Studio Server home directory. It also installs a set of job files for the Web Studio modules that you selected to install. You will now deploy the Web Studio client to the platform where an Apache Tomcat web server or JBoss web server is installed. This is the computer where Web Studio will run.

Navigate to the `share\web` folder for the Web Studio Server. You should see the `webstudio.war` file:

```
WEB_STUDIO_SERVER_HOME\share\web\webstudio.war
```

If the Apache Tomcat web server or JBoss web server is running on the web server computer, stop it.

Copy the `webstudio.war` file to the web application folder of the web server directory, such as the `webapps` folder for the Apache Tomcat server.

Start the Apache Tomcat web server or JBoss web server.

Access Web Studio

To access Web Studio, open the following URL in a web browser:

```
http://web_server_hostname:8080/webstudio/index.html
```

For more information about Business Data Network, see the "Business Data Network" chapter in the *DataFlux Web Studio User's Guide*.

Configuring Reference Data Manager

Overview

After you complete the tasks that are described in [Installing Web Studio and Related Software](#), then you are ready to configure the Web Studio modules that you selected to install. This topic describes how to configure Reference Data Manager.

If you have not installed Business Data Network, then you should still perform most of the configuration tasks that are described in [Configuring Business Data Network](#), with exceptions as noted below (*).

- [Create the Web Studio Repository](#). Same for Reference Data Manager.
- [Enable the Web Studio Server to Access the Repository](#). Same for Reference Data Manager.

- * [Add Required Users and Groups on the Authentication Server](#). Define Reference Data Manager users and groups instead of Business Data Network users and groups. There are no required names for Reference Data Manager users and groups.
- * [Grant Access to Business Data Network Jobs](#). Grant access to Reference Data Manager jobs instead of Business Data Network jobs. See [Install Web Studio on the Web Studio Server](#) for a description of the folders where Reference Data Manager jobs are installed.
- * [Register the Web Studio Server as a Business Data Server](#). Ignore for Reference Data Manager.
- * [Add Users on the Business Data Server](#). Ignore for Reference Data Manager.
- * [Verify the Web Studio Configuration File](#). Confirm that the entry for **RDM DMS Server Address** points to the correct Web Studio server and that the port is correct. If you need to make any updates to the `web.xml` file, make the updates, then run the Web Studio Update Tool to apply your changes. For more information, see [Updating Web Studio Configuration Files](#).
- [Deploy Web Studio to the Apache Tomcat or JBoss Web Server](#). Same for Reference Data Manager.
- [Access Web Studio](#). Same for Reference Data Manager.

If you installed Monitor Viewer and Dashboard Viewer, and/or Business Data Network, then you must perform all of the configuration tasks that are described in [Configuring Business Data Network](#) and/or [Configuring Monitor and Dashboard Viewer](#).

Configuring Monitor Viewer and Dashboard Viewer

Overview

Exceptions to monitored business rules are generated by data monitoring jobs that are created in Data Management Studio and are then deployed to a Data Management Server. The output of these jobs can be monitored in Web Studio, using Monitor Viewer and Dashboard Viewer.

When you install Web Studio with Monitor Viewer and Dashboard Viewer, the default configuration file `monitor-servers.xml` will specify the Web Studio Server as the monitored server. Typically, however, you will want to monitor other Data Management Servers at your site, not the Web Studio Server. In general, you will perform the following tasks:

- Install Web Studio on the Web Studio Server, as described in [Installing Web Studio and Related Software](#).
- Configure Monitor Viewer and Dashboard Viewer on the Web Studio Server, as described below. You might not monitor the Web Studio Server, but this server is the hub for Web Studio maintenance, so it must be installed and configured.

- Run the Web Studio installation wizard on any Data Management Server that you want to monitor. The goal is to install the jobs for Monitor Viewer and Dashboard Viewer on the servers that you want to monitor. These local jobs are required in order to return information to Monitor Viewer and Dashboard Viewer in Web Studio. For more information, see [Configure Existing Data Management Servers for Data Monitoring](#).

Configure Monitor Viewer and Dashboard Viewer on the Web Studio Server

After you complete the tasks that are described in [Installing Web Studio and Related Software](#), then you are ready to configure the Web Studio modules that you selected to install. This topic describes how to configure Monitor Viewer and Dashboard Viewer on the Web Studio Server.

If you have not installed Business Data Network, then you should still perform many of the configuration tasks that are described in [Configuring Business Data Network](#), with exceptions as noted below (*).

- [Create the Web Studio Repository](#). Same for Monitor Viewer and Dashboard Viewer.
- [Enable the Web Studio Server to Access the Repository](#). Same for Monitor Viewer and Dashboard Viewer.
- * [Add Required Users and Groups on the Authentication Server](#). Add Monitor Viewer and Dashboard Viewer users and groups.
- * [Grant Access to Business Data Network Jobs](#). Ignore this task for Monitor Viewer and Dashboard Viewer on the Web Studio Server. However, you must enable Monitor Viewer users and Dashboard Viewer users to run the Monitor Viewer jobs on any secure Data Management Servers that you want to monitor. For more information, see [Configure Existing Data Management Servers for Data Monitoring](#).
- * [Register the Web Studio Server as a Business Data Server](#). Ignore for Monitor Viewer and Dashboard Viewer.
- * [Add Users on the Business Data Server](#). Ignore for Monitor Viewer and Dashboard Viewer.
- * [Verify the Web Studio Configuration File](#). Same for Monitor Viewer and Dashboard Viewer.
- [Deploy Web Studio to the Apache Tomcat or JBoss Web Server](#). Same for Monitor Viewer and Dashboard Viewer.
- [Access Web Studio](#). Same for Monitor Viewer and Dashboard Viewer.

If you installed Business Data Network and/or Reference Data Manager, then you must perform all of the configuration tasks that are described in [Configuring Business Data Network](#) and/or [Configuring Reference Data Network](#).

Configure Existing Data Management Servers for Data Monitoring

Dashboard Viewer and Monitor Viewer can monitor any DataFlux Data Management Server version 2.2 or later on which data monitoring jobs are running. By default, the Web Studio Server will be monitored. However, many sites would rather monitor production servers or other Data Management Servers. If you want to monitor existing Data Management Servers at your site, then you must perform the following configuration tasks.

Run the Web Studio Installation Wizard on Each Server to Be Monitored

Run the Web Studio installation wizard on each additional Data Management Server that you want to monitor. This will install the jobs that are required by Dashboard Viewer and Monitor Viewer.

Perform the following steps:

1. Stop the Data Management Server.
2. Run the Web Studio installation wizard on the Data Management Server.
3. Select Dashboard Viewer and Monitor Viewer. This will install the jobs that are required by these modules. For more information about this wizard, see [Install Web Studio on the Web Studio Server](#).
4. Restart the Data Management Server.

Grant Access to Monitor Viewer/Dashboard Jobs (for Secure Servers Only)

When you installed Monitor Viewer and Dashboard Viewer on a Data Management Server, you installed jobs in the following folders:

- `var\Data_services\Monitor` folder
- `var\Process_services\Monitor` folder
- the `share\web` folder contains backup copies of the original jobs and services

A secure Data Management Server is a server to which access is controlled by an Authentication Server. If you have installed the jobs that are required by Dashboard Viewer and Monitor Viewer on a secure server, then you must enable the appropriate users and groups to run these jobs. The steps are similar to those that are described in [Grant Access to Business Data Network Jobs](#).

Update the monitor-servers.xml file on the Web Studio Server

The next task is to update the configuration file `monitor-servers.xml` on the Web Studio Server so that it specifies all of the Data Management Servers that you want to monitor. You make these updates on the Web Studio Server first, because this server is the hub for Web Studio maintenance. After you update the `monitor-servers.xml` file, you will update the local image of Web Studio, then deploy the updated WAR file to the server where Web Studio is actually running.

Update the `monitor-servers.xml` file in the following location on the Web Studio Server:

```
WEB_STUDIO_SERVER_HOME/etc/web/WEB-INF/conf/monitor-servers.xml
```

Update the `monitor-servers.xml` file so that it specifies all of the Data Management Servers that you want to monitor. Here is an example `monitor-servers.xml` file.

```
<?xml version="1.0" encoding="UTF-8" standalone="no" ?>
<DMServers>
  <DMServer name="Monitor DM Server"
    description="Data Management Server with Monitor results"
    hostname="my_host.com"
    port="21042"
    ssl="false"/>
</DMServers>
```

You could copy a `<DMServers>` block, paste the block under the current block, and replace the server information in the second block so that an additional Data Management Server is specified in the file. Note that the display name that you specify in the `DMServer name` attribute is the server name that is displayed in Web Studio. After updating this file, run the Web Studio Update Tool to apply your changes. For more information, see [Updating Web Studio Configuration Files](#).

Finally, you will deploy the Web Studio WAR file to the computer where Apache Tomcat or JBoss are installed. For more information about this step, see [Deploy Web Studio to the Apache Tomcat or JBoss Web Server](#).

Updating Web Studio Configuration Files

At some point, you will update Web Studio in one or more the following ways:

- apply a DataFlux patch for Web Studio
- update server locations
- change the order of the module tabs in the main Web Studio window
- change which module has focus when you first log in to Web Studio
- update the list of Data Management Servers to be monitored by Dashboard Viewer and Monitor Viewer

In order to make changes like this, you must do the following tasks:

1. Update the `web.xml` and/or the `monitor_servers.xml` files in the `etc/web` folder for the Web Studio Server (the server where Web Studio was first installed).
2. Run the Web Studio update tool to apply the changes to the Web Studio WAR file. To run the update tool, do one of the following:

On UNIX, run `./bin/update_web` from the Web Studio Server home directory.

On Windows, click on the **Update Web Studio** shortcut in the Web Studio Server home directory.

3. Redeploy the Web Studio WAR file to the computer where Apache Tomcat or JBoss are installed (the computer where Web Studio is running). For more information about this step, see [Deploy Web Studio to the Apache Tomcat or JBoss Web Server](#).

You would update the `monitor_servers.xml` to add or update the list of Data Management Servers to be monitored by Dashboard Viewer and Monitor Viewer. For more information, see [Configure Existing Data Management Servers for Data Monitoring](#).

You would update the `web.xml` file in order to update server locations, change the order of the module tabs in the main Web Studio window, and to perform other tasks. For example, the following block in the `web.xml` file specifies the active Web Studio modules. You can edit this list to display only those modules that you want to display. The order of the modules in this block specifies the order of the module tabs in the main Web Studio window.

```
<env-entry>
<description>Web Studio Active Modules</description>
<env-entry-name>activeWebStudioModules</env-entry-name>
<env-entry-type>java.lang.String</env-entry-type>
<env-entry-value>BusinessData,Dashboard,Monitor,ReferenceData</env-entry-value>
</env-entry>
```

The following block specifies which module has focus when you first log in to Web Studio:

```
<env-entry>
<description>Web Studio Default Module</description>
<env-entry-name>defaultWebStudioModule</env-entry-name>
<env-entry-type>java.lang.String</env-entry-type>
<env-entry-value>BusinessData</env-entry-value>
</env-entry>
```

Technical Support

This section addresses questions and issues related to DataFlux Web Studio.

[Frequently Asked Questions](#)

If you do not find your answer, please contact [DataFlux Technical Support](#).

Frequently Asked Questions (FAQ)

The following questions and answers are designed to assist you when working with DataFlux Web Studio.

What is the Difference Between a Data Management Server, a Web Studio Server, and a Business Data Server?

A Data Management Server is one of the main servers in the DataFlux Data Management Platform. The Web Studio Server and the Business Data Server are specially-configured Data Management Servers.

Data Management Servers provide a scalable server environment for large Data Management Studio jobs. Jobs can be uploaded from Data Management Studio to a Data Management Server, where the jobs are executed. The main administrative interface for Data Management Servers is the **Data Management Servers** riser in Data Management Studio. For more information about these servers, see the *DataFlux Data Management Server Administrator's Guide* and the *DataFlux Data Management Server User's Guide*.

A Web Studio Server is a Data Management Server that is configured for Web Studio. This guide (the *DataFlux Web Studio Installation and Configuration Guide*) is the main reference for Web Studio Servers.

A Business Data Server is a Data Management Server that is configured for the Web Studio module, Business Data Network. The main administrative interface for Business Data Servers is the **Business Data Servers** folder in the **Administration** riser in Data Management Studio. This guide (the *DataFlux Web Studio Installation and Configuration Guide*) and the *DataFlux Data Management Studio User's Guide* are the main references for Business Data Servers.