

Retain for future use.

Use this instruction sheet when you install the System Manager 4.0.1, Advanced Reports add-on.

What's New?

If you are upgrading from an earlier version of SMS, here are the new features that have been added since SMS 4.0.1:

- **Advanced Reports add-on:** standard with SMS Professional, an optional purchase with SMS Standard. This feature runs on Crystal Enterprise, and it includes several new reports, such as energy cost summary and shift energy. An additional tool helps you transfer your old Information Manager reports into the Advanced Reports tool.

Note: Information Manager is still used for reports in SMS DL and SMS SE without the Advanced Reports option.

Using the Advanced Reports add-on gives you the ability to create reports remotely, from web clients. You can export reports in common formats, such as pdf, xls, doc, and rtf.

- **Time of Use Tool:** This new feature allows you to set up time-of-use (TOU) schedules to be used with the new advanced reports.
- **New Database Import tool:** Import/convert your old database to be used in Advanced Reports. You have the option of doing a fast import (which requires SMS to be offline) or an online import (which allows you to keep using SMS during the import).
- **New Database Management tool:** This tool replaces the old Database Services. Use it to import, export, and back up history data.

Before installing

Read the *Power Monitoring & Control System Software Policy*, included in your software shipment. This document contains warranty information and the software license agreement. Make sure you agree with the conditions of the agreement before you open the seal on the software package.

Ensure that the prerequisites described in the Prerequisites section of the *SMS Setup Guide* have been met. If all prerequisites are not met, the install program will notify you and will exit the installation.

Read the "Administrative Concerns" sections in chapters 2 and 4 of the *SMS Setup Guide*. These sections include information on such topics as setting up third-party products. Follow the guidelines in this section to be sure that your system operates properly.

Install SMS Using a Dedicated Windows Administrator Account

The person who installs the Advanced Report add-on must be logged on to the server computer as a Windows Administrator on the local computer. Create this Administrator account before you begin the SMS install.

- This account cannot be logged on to the domain during installation.
- This account should be dedicated. It cannot have the same name as any other account on the domain.
- The account's password cannot be blank, and it must be set to never expire. When creating this account, do not check the box "User must change password at next logon."
- If you install SMS on a computer that has Windows Server 2003 as its operating system, you must use an Administrator account that also belongs to the IIS Worker Process Group (IIS_WPG group).

Changing the Windows Password

If you must change the Windows password at a later time, you also need to re-set it in SMS:

From the SMS Setup Utility toolbar, click Tools > Configuration Utility. On the Diagnostics tab, click Setup to launch the PowerLogic Service Setup Utility. On the Run Mode screen, select the Account Name; then enter and verify the new password. You will need to restart the computer to make the change take effect.

Installation Instructions

Have your installation CDs ready. You will be guided through a "Launchpad" procedure to ensure that all SMS features are correctly installed. Follow these steps:

1. **Follow all of the instructions** in these Installation Notes.
2. **Back up the SMS database.** Use Database Services in the SMS Setup Utility to make a backup copy of the SMS database.
3. **Close all Windows applications** on the SMS 4.0 server computer.
4. **Follow the installation steps in the Setup Guide.** Chapter 4 contains instructions for installing the Advanced Reports add-on.
5. **Register your software.** Complete the registration form. Submit it online, or print and fax it to your local sales representative. Identify the entire product (for example, *SMS DL*) and all serial numbers that you have installed. The serial number is on the license agreement card in your shipment (document # 63220-046-02).
6. **Begin using SMS 4.0.1, Advanced Reports add-on.**

Use these paths to launch the various SMS features:

SMS browser (from the SMS server): Click Start > Programs > POWERLOGIC > System Manager Software.

SMS browser (from a remote computer): At the client, open Internet Explorer and enter the computer name or IP address for the SMS 4.0 server computer, followed by "/powerlogicweb."

For help, click the System tab, then click Documentation and Links. From the tree control, select SMS 4.0 User's Guide.

SMS Setup Utility: At the server computer, click Start > Programs > POWERLOGIC > SMS Setup. From a remote computer, launch the SMS browser, then click the System tab. View the browser help for instructions on opening the SMS Setup utility. For help, click Help > Setup Utility Help.

Advanced Reports application: Click Start > Programs > POWERLOGIC > Advanced Reports. For help, see the Advanced

Reports help file. With Advanced Reports displayed, click *AR Help* in the upper right corner of the screen.

Advanced Reports Database Management (ARDM) tool: Open the SMS Setup Utility client. Click Setup > Administrative > Advanced Reports > Database Maintenance. For help, launch the utility, and then click Help to access its online help file.

Information Manager Report Configuration Utility (IMRCU): Open the SMS Setup Utility client. Click Tools > Report Configuration. For help, click Help.

History data importers: Click Start > Programs > POWERLOGIC > Tools; then choose Fast Import Utility to begin the fast (offline) importer, or choose Online Import Utility to launch the slower (online) importer. For help, see the chapter entitled *Advanced Reports Add-On Installations* in the *SMS Setup Guide*. There is a section called "Importing History Data from the Previous Version of SMS."

Time of Use (TOU) Schedules: From the SMS Setup Utility, click Setup > Define Time of Use Schedules. For help, read the on-screen instructions or click Help.

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