

PowerLogic™ SMS System Manager™ Software Setup Guide

Version 4.3 (SMS PE, new and upgrade)

Version 4.2 (SMS SE and DL, new)

Version 4.0 SU1 (SMS SE and DL, upgrade)

Instruction Bulletin

63220-060-228H1

HAZARD CATEGORIES AND SPECIAL SYMBOLS



Read these instructions carefully and look at the equipment to become familiar with the device before trying to install, operate, service or maintain it. The following special messages may appear throughout this bulletin or on the equipment to warn of potential hazards or to call attention to information that clarifies or simplifies a procedure.

The addition of either symbol to a “Danger” or “Warning” safety label indicates that an electrical hazard exists which will result in personal injury if the instructions are not followed.

This is the safety alert symbol. It is used to alert you to potential personal injury hazards. Obey all safety messages that follow this symbol to avoid possible injury or death.

DANGER

DANGER indicates an imminently hazardous situation which, if not avoided, **will result** in death or serious injury.

WARNING

WARNING indicates a potentially hazardous situation which, if not avoided, **can result** in death or serious injury.

CAUTION

CAUTION indicates a potentially hazardous situation which, if not avoided, **can result** in minor or moderate injury.

CAUTION

CAUTION, used without the safety alert symbol, indicates a potentially hazardous situation which, if not avoided, **can result** in property damage.

PLEASE NOTE

Electrical equipment should be installed, operated, serviced, and maintained only by qualified personnel. No responsibility is assumed by Schneider Electric for any consequences arising out of the use of this material.

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Introduction

What is SMS?

PowerLogic® System Manager™ Software (SMS) provides access to real-time and historical system data using a standard web browser format. With SMS, you can:

- view real-time data in meters, bar charts, tables, and trends
- view documents (in PDF and HTML format) and web links to certain Schneider Electric sites, as well as to your own favorite sites
- view “web-enabled” devices from SMS Setup (when adding the device to SMS Setup, you can set it to be web enabled)
- set user preferences for the SMS browser display
- store and view historical waveforms
- create and view historical reports
- configure and retrieve alarm information
- create and view interactive data diagrams

The SMS Setup client continues to be available. See *SMS Setup Client*, below for more information.

There are three SMS products: System Manager Device Limited (System Manager DL), System Manager Standard (System Manager SE), and System Manager Professional (System Manager PE). Throughout these instructions, all three products may also be called “SMS.” Not all of the SMS features are available in all three products. When a feature is limited to one or two of the SMS products, the instructions will explain the limitation.

SMS Web Client

You can view SMS information, as a “web client,” from any computer that has Microsoft Internet Explorer, version 6.0, service pack 1, or greater. As long as the browser can connect to the SMS server computer, users have full access to the SMS web client features.

For a description of all of the web client features, see the SMS online user’s guide, accessed from within the web client. See Table 2–1 on page 5 for hardware requirements. See “SMS Licensing Requirements” on page 13 for an explanation of licensing requirements.

SMS Setup Client

In addition to viewing information through a browser connection, you can access information through the SMS Setup client, which runs on the server computer (Start > Programs > POWERLOGIC > SMS Setup). With SMS PE, you can access SMS Setup remotely (see “What are Terminal Server/Terminal Services?” on page 2). You will use SMS Setup to set up your system devices: to add and configure devices and their network addresses. With SMS Setup, you can also set up historical logging and system alarms, and view real-time data (from the server computer).

For information about launching SMS Setup, see the *SMS User’s Guide* (from the SMS browser, click the System tab; then click “SMS User’s Guide” from the list in the left pane

of the window. For information about using SMS Setup, refer to SMS Setup online help file (from within SMS Setup, click Help > Setup Utility Help).

Part of SMS Setup is the PowerLogic Network Server (PLNS), which resides on the SMS server. To ensure that browser connections reflect correct device information, you must run the PLNS as a Windows service. You will set the "server as a service" status during SMS installation.

What are Terminal Server/Terminal Services?

Terminal Server and Terminal Services are Microsoft components that allow multiple users at remote computers to open simultaneous sessions on the server computer without any of them taking over the main desktop (SMS PE only). You install these components after you install SMS. After you install Terminal Server, you must purchase the applicable licensing components from Microsoft. For installation instructions, see "Installing Terminal Server" on page 23. If you have already installed Terminal Server, you must uninstall it during SMS installation.

Because System Manager DL and System Manager SE do not allow remote connections, you do not use Terminal Server or Terminal Services with these two SMS products.

You must own sufficient Microsoft® Windows® client access licenses (CAL) and Terminal Services client access licenses (TSCAL) for the number of users that will connect to the SMS server simultaneously. Contact Microsoft to purchase the necessary licenses.

Note

The browser must be Internet Explorer, version 6.0, service pack 1, or greater. You cannot use Netscape or other browsers to view SMS screens.

If you have SMS PE and you do not wish to use Terminal Server/Terminal Services, you can choose to run a remote SMS SE client on a virtual machine. See "Installing SMS on a Virtual Machine (SMS PE Only)" on page 19 for instructions on installing this virtual client.

Contents of this Package

In this package you will find:

- SMS installation DVD for SMS PE (new or upgrade) or SMS DL/SMS SE (new); or installation CDs for SMS DL and SMS SE (upgrade)
- PowerLogic Software Policy: containing license agreement; be sure you agree with the terms of this license agreement before you break the seal on your software
- SMS Installation Notes, containing last-minute instructions for installing and using SMS
- Product serial number to register your System Manager products; the serial number is found on a silver sticker on the software box, and on a card inside the software box.

User Documentation and Help Files

SMS includes a number of documents and online help files. The table below lists some typical topics, the product you will use, and where to find the related information.

What do you want to do?	Where do you go?	Where can you find help?
Review requirements and special settings for SMS installation	this Setup Guide	See the sections entitled "Prerequisites" on page 3 and "Administrative Concerns" on page 8 of this Setup Guide.
Installation	SMS Launchpad installation	SMS Setup Guide; see chapter 2 for new installations; see chapter 3 for upgrade installations.
Launch (access) SMS Setup client	Start Menu	SMS User's Guide (HTML help file, accessed from the browser); or see "Accessing the SMS Setup Client" on page 59 of this setup guide.
View Information via your browser	Start Menu	SMS User's Guide (HTML help file, accessed from the browser); or see "Accessing the Server Computer" on page 55 of this setup guide.
Set up system devices or user accounts	SMS Setup client	Setup Utility online help file
Set up reports	Advanced Reports (SMS PE only) Information Manager (SMS SE and SMS DL only)	Advanced Reports online help file Information Manager online help file
Set up historical logging and device alarms	SMS Setup client	Setup Utility online help file

Prerequisites

Before you install SMS, ensure that you have all of the prerequisites listed below:

1. **Windows Accounts that You Will Need.** You need two unique Windows accounts:
 - The person who installs SMS must be logged on to the server computer as a **Windows Administrator on the local computer.**

This account cannot be logged on to the domain during installation.

This account should be unique. It cannot have the same name as any other on the domain.
 - In addition, you will be asked for a Windows Administrator account during the installation procedure. This should be a unique account that is dedicated for use with SMS. It will be used to synchronize SMS components with Windows. Add this account before you begin the installation.

This account password cannot be blank, and it must be set to never expire. When creating the account, do not check "User must change password at next logon."
2. **IIS_WPG membership:** If you install SMS on a computer that has Windows Server 2003, Windows Server 2008, or Windows Vista as its operating system, you must use an Administrator account that also belongs to the IIS Worker Process Group (IIS_WPG group). To add an administrator to the IIS_WPG, follow these steps (Note: for Windows Server 2008 or Windows Vista, the IIS_WPG feature is not available until you are installing SMS):
 - a. From the Control Panel, double-click Administrative Tools; then double-click Computer Management.
 - b. Highlight Local Users and Groups, and double-click Groups; then double-click IIS_WPG.
 - c. At the IIS_WPG Properties screen, click Add to display the Select Users screen.
 - d. In the "Enter the object names to select box," type the administrator's ID.
 - e. Click OK, then click OK to close the IIS_WPG Properties screen. Close the Computer Management screen and the Administrative Tools window.

3. **Disk Space for Installation:** The SMS server computer must have a C drive. Disk space requirements vary, depending on the SMS product you have purchased. See Table 2–1 on page 5 for space requirements for logging historical data.
4. **Operating System:** The SMS server computer must have the appropriate operating system for the product you have purchased. See Table 2–1 on page 5 for operating system requirements.
5. **Internet Explorer:** Windows Server 2003, Windows Server 2008, or Windows XP: Internet Explorer version 6.0, service pack 1 or greater must be installed on the server computer. Windows Vista: Internet Explorer version 7.0 must be installed on the server computer. You may install more recent versions or service packs, but you cannot use Netscape or other browsers.
6. **(SMS 4.3 PE only) Microsoft .NET Framework 3.5, Service Pack 1:** For SMS 4.3, you must install .NET Framework 3.5, Service Pack 1. The installation file, *dotnetfx.exe*, is located on the installation DVD. For new installations, see ProfessionalEditionNew > Tools. For upgrade installations, see SMSPEUpgrade > Tools.

For SMS 4.2 and earlier, .NET Framework 2.0 is installed as part of the SMS installation.

7. **SQL 2000 MSDE Service Pack 3 (SMS SE and SMS DL only):** SMS requires that SQL Service Pack 3 be installed on the server computer. If you need to install SQL Service Pack 3, see “Installing SQL Service Pack 3 (SQL 2000 only)” on page 52. If SQL Service Pack 3 is already installed on the server computer, verify that the SQL agent is set to automatic:
 - a. Display the SQL Server Service Manager box: click Start > Programs > Startup > Service Manager.
 - b. In the Server box, enter <computer name>\smsxxxx (where “<computer name>” is the name of the server computer, and where smxxxx is the name of the SMS product: SMS3000, SMS1500, PMX1500, or SMS121).
 - c. From the Services pull-down box, select SQL Server Agent.
 - d. Check the box named “Auto-start service when OS starts.”
 - e. Close the SQL Server Service Manager box.
8. **Uninstalling Terminal Server:** If you are installing SMS PE on a computer that has Windows Server 2003 or Windows Server 2008 as its operating system, and if Terminal Server is already installed, you must uninstall Terminal Server before you begin the SMS installation (you will be able to re-install it after you follow the installation steps).

To uninstall Terminal Server on Windows Server 2003:

- a. From the Control Panel, click Add or Remove Programs.
- b. At the Add/Remove Components screen, click Add or Remove Windows Components.
- c. At the Windows Components window, uncheck Terminal Server.

To uninstall Terminal Server on Windows Server 2008:

- a. From the Control Panel, double-click Programs and Features.
- b. On the Programs and Features screen, click Turn Windows features on or off.
- c. On the left side of the page, open the Roles node. Right-click Terminal Services, and choose Remove Role Services.
- d. At the Select Role Services screen, uncheck Terminal Server, then click Next.

- e. At the Confirm Removal Selections, click Remove.
- f. After Terminal Services is removed, restart the computer.

If you are installing SMS DL or SE on a computer that has Windows 2000 Server as its operating system, and if Terminal Services is already installed, you must uninstall Terminal Services before you begin the Launchpad installation (you will be able to re-install it after you follow the launchpad steps). To uninstall Terminal Services:

- a. Click Start > Settings > Control Panel. Then double-click Add or Remove Programs.
 - b. At the Add or Remove Programs screen, click Add/Remove Windows Components.
 - c. At the Windows Components window, uncheck Terminal Services. Click Next.
9. **Upgrades:** If you are upgrading from a previous version of SMS, you must have installed SMS version 3.3.2.3 or SMS version 4.0 on the SMS server computer.
10. **Database Backup:** If you are upgrading from a previous version of SMS, be sure that you back up your SMS databases before you begin.

Table 2–1 lists the hardware/software requirements to run SMS. “SMS Licensing Requirements” on page 13 lists the minimum licensing requirements to provide SMS browser connections.

Table 2–1: SMS Hardware/Software Requirements

Requirement	SMS Product			
	System Manager DL	System Manager SE	System Manager PE Server	Remote Browser Computer
Processor Speed (recommended/minimum)	2.4 GHz/733 MHz ¹		2.8 GHz/1 GHz	N/A
RAM (recommended/minimum)	512 MB/256 MB ¹		1 GB/512 MB	256 MB/64 MB
Disk Space (recommended/minimum) Include space for logging; see “Calculating Space Requirements for Logging” on page 7.	10/5 GB free space ¹		20 GB/10 GB free space An additional 4 GB free space is necessary on the drive that contains Program Files (to install Crystal Enterprise in SMS PE)	N/A
CD/DVD Drive	All 4.2 and 4.3 releases			N/A
PC Monitor Resolution	800x600 minimum		1024x768 minimum	800x600 minimum
DEP Setting	Hardware DEP and software DEP settings are interrelated. See the DEP Notice included with your SMS shipment for help.			

1 You will not be able to install SMS unless the computer meets the minimum requirements.
 2 The following two issues are true for any non-server operating system:
SQL issue: The number of database connections is limited. Adding additional features, such as custom applications, could adversely affect performance. Contact your Schneider Electric representative for more information.
IIS issue: IIS has a hard-coded limit of 10 simultaneous browser connections. Each time you launch Internet Explorer on the same computer, two or more of these browser connections are used. Thus, you can quickly reach the limit. At that point, the web server will not allow additional connections.

Table 2–1: SMS Hardware/Software Requirements

Requirement	SMS Product			Remote Browser Computer
	System Manager DL	System Manager SE	System Manager PE Server	
Operating System and Service Pack (SP) All operating systems must be 32 bit.	Windows XP Professional, SP2 or higher Windows Server 2003 Standard Edition, SP1 or higher Windows Server 2003 Enterprise Edition, SP1 or higher Windows Server 2003 R2 Standard Edition Windows Server 2003 R2 Enterprise Edition Windows Vista Business (v. 4.2 only) Windows Vista Enterprise (v. 4.2 only) Windows Vista Ultimate (v. 4.2 only) Windows 2000 Professional, SP3: upgrades only Windows 2000 Server/Advanced Server, SP3 (SP4 for Advanced Reports): upgrades only	Windows XP Professional, SP3 ² or higher Windows Server 2003 Standard Edition, SP 2 or higher Windows Server 2003 Enterprise Edition, SP 2 or higher Windows Server 2003 R2 Standard Edition, SP2 or higher Windows Server 2003 R2 Enterprise Edition, SP 2 or higher Windows Server 2008 Enterprise Edition, SP1 or higher Windows Server 2008 Standard Edition, SP1 or higher	Any operating system listed in the left-hand columns	
Browser	Internet Explorer 6.0, SP 1 or greater. Netscape and earlier versions of Internet Explorer cannot be used.			
Internet Information Services (IIS)	Enables SMS to serve web pages to browser clients. All operating systems except Vista: Version 6.0 SP1 (or higher) required. Vista operating systems: Version 6.0 SP1 required AND several additional features must be enabled. See "Windows Vista" on page 15 for installation instructions.			N/A
Active Server Pages (ASP) and ASP.NET	Windows 2000 and XP: automatically installed and enabled with IIS. Windows Server 2003: installed with IIS, but is enabled separately. Windows Vista and Windows 2008: must be installed.			
Microsoft Message Queuing Component (MMSQ)	N/A	Required	N/A	
Terminal Server/Terminal Services	N/A	Used for accessing the SMS Setup client from a remote browser	N/A	
Microsoft .NET Framework	SMS 4.3 PE: .NET Framework 3.5, SP1 must be installed before you run the SMS installation. See "Prerequisites" on page 3 for the location of this installation file. SMS 4.2 and earlier: .NET Framework 2.0 is installed as part of the SMS installation.			N/A
Maximum Number of Simultaneous Browser Connections	1 (optional purchase: can be increased to 6)	10 (optional purchase: can be increased in increments of 5 to a maximum of 30)		N/A
Maximum Number of Simultaneous Device Connections	16 (can be increased to 32 with optional SMSDL32U product)	Unlimited		N/A

1 You will not be able to install SMS unless the computer meets the minimum requirements.

2 The following two issues are true for any non-server operating system:

SQL issue: The number of database connections is limited. Adding additional features, such as custom applications, could adversely affect performance. Contact your Schneider Electric representative for more information.

IIS issue: IIS has a hard-coded limit of 10 simultaneous browser connections. Each time you launch Internet Explorer on the same computer, two or more of these browser connections are used. Thus, you can quickly reach the limit. At that point, the web server will not allow additional connections.

Calculating Space Requirements for Logging

Before you log history data, you should ensure that you have sufficient hard disk space for the logging you want to do. Use the following formulas to estimate your disk space requirements for historical logging.

1. Estimate the disk space needed to log one template.

To determine the space used by any template:

$(\# \text{ of quantities logged} + 1) * 31 \text{ bytes/sample} * \# \text{ of samples logged/day} * \# \text{ of devices assigned to the template}$

For example, if you log 59 quantities for 25 devices at 15-minute intervals (96 samples/day/device), the formula is:

$(59 + 1) * 31 * 96 * 25 = 4,464,000 \text{ bytes} = 4.46 \text{ MB/day}$

2. Estimate the total disk space needed for historical logging.

Multiply the figure from Step 1 by the number of days of data retained in your history database (default is 400 days; see the SMS Setup online help file for instructions on changing the default).

In this example, the total disk space needed for historical logging would be:

$4.46 \text{ MB/day} * 400 \text{ days} = 1.78 \text{ GB}$

Note

You need to perform these calculations for every template that you are using.

Administrative Concerns

Security Setup

To access SMS, every user needs an SMS user name and password. You must understand SMS user account information before you create and assign these user names and IDs. For instructions on adding user accounts, see the SMS Setup help file.

Each SMS user who accesses SMS Setup through Terminal Services or Terminal Server (System Manager PE only) must have a *unique* SMS user name and password. (In SMS, a user name/password can be used by only one user at a time.) The level—1 through 10—that you give the user provides specific access rights to SMS. The access level table (in SMS Setup online help file) shows the level required for each SMS feature.

Although SMS Setup requires specific security levels in order to access its features, the SMS browser allows full access to any user ID level. You do not need unique user IDs for browser access; multiple users can use the same user name and password.

Windows Authentication Used for SQL 2005 Log-ins (SMS PE v 4.3 only)

Because of increased security requirements, we have changed how we manage software authentication. We now use Windows Authentication to control log-ins to SQL 2005. Windows Authentication introduces a higher level of security than Mixed Authentication (SQL Server Authentication or “sa”). With SQL Server Authentication, user names and passwords are stored in the SQL server. There are programs that can “guess” SQL server passwords, allowing control to your SQL server.

Using Windows Authentication minimizes this problem: users must authenticate at the domain level. Because there is no sa account or password, no one can guess the password.

Using Windows Authentication also ensures compliance with proper complex password policy for your system, which is defined by your system administrator.

Use of Encryption

Although we do encrypt user names and passwords at login, we do not support SSL (secure sockets layer) or TLS (transport layer security) protocols.

When Data Execution Prevention (DEP) is on the Computer

According to the Microsoft Help and Support site, “DEP is a set of hardware and software technologies that perform additional checks on memory to help prevent malicious code from running on a system.” When software DEP is on a computer, you may not be able to install or run SMS or Advanced Reports. If you see a message telling you that the install cannot continue because of Data Execution Protection, the install will stop. For a complete discussion of DEP, refer to the DEP *Notice* (document number 63220-060-263) that was included with your SMS shipment.

Microsoft Windows/SQL Updates

Periodic updates to such applications as Microsoft Windows and SQL can create issues in SMS. Before you install an upgrade to one of these applications, it is a good idea to check with your local Schneider Electric representative. The representative may have information about whether the upgrade could have a negative affect on your SMS system. This is also true of other third-party products, such as Crystal Enterprise.

Avoid Blank Passwords in Windows Accounts (SMS SE and DL only)

When setting up the PowerLogic Network Server to run as a Windows service (which you do during the SMS launchpad installation), you use an administrator or power user account. This account cannot have a blank password. Using a blank password will cause the PowerLogic Network Server service to be unable to start.

Communications Protocol Setup (Upgrades Only)

For the best performance of your SMS product, we highly recommend that you use TCP/IP for your communications protocol. The communications protocol is set in the SMS Configuration Utility (Start > Programs > POWERLOGIC > TOOLS > SMS Config Utility; or, from within SMS Setup, click Tools > Configuration Utility). If you need help when making changes in this utility, see the SMS Setup online help file.

SQL Considerations

SMS 4.3: The 4.3 release of SMS supports SQL 2005 Standard and Express editions. SQL Server 2005 Enterprise is not supported. SMS 4.3 uses Windows Authentication for SQL 2005 logins.

SMS 4.2 and earlier: Please verify the SQL configuration on the SMS server computer before you continue with the SMS installation. There are two possibilities:

- The SMS installs add a SQL instance named *powerlogic*, with mixed-mode authentication. If you change or delete this instance, you cannot log on to SMS.
- If you do not want to install the *powerlogic* instance via the Launchpad, you can use our own copy of SQL Server software to create your own instance. But the instance must be named *powerlogic*, and it must have mixed-mode authentication.

By default, SMS 4.2 new installations add SQL with the “sa” account and a “DBMaster” password (this password cannot be blank). You can change the DBMaster password to your own password during installation or later.

Windows 2008 and Vista Issues

Disabling Automatic Updates:

When any of the Windows Server 2008 or Vista operating systems are set to accept automatic updates, your computer will restart after every automatic update is processed. It is also possible that the PowerLogic Network Server will not restart automatically when the computer restarts, but will need to be restarted manually. To avoid automatic computer restarts (and potential data loss), you should set the Windows Update feature to prompt you to accept updates. To do this, click Start > All Programs. Double-click Windows Update. Then click Change Settings. From the Windows Update window, click the radio button for “Check for updates but let me choose whether to download and install them.”

Disabling Sleep Mode:

In Windows Server 2008 or Vista, when the computer is allowed to go into sleep mode, SMS cannot process scheduled tasks and reports. **Scheduled events will not run while the computer is in sleep mode.** This includes scheduled tasks, reports, and database maintenance. For this reason, we recommend that you disable your Vista operating system sleep mode. To do this, follow these steps:

1. Before you install SMS, open the control panel on the SMS computer.
2. Switch to Classic view; locate and click Power Options.
3. For the plan that is selected (Balanced, Power saver, or High performance), click “Change plan settings.”

4. Change the “Turn off the display” option to Never. This also changes the “Put the computer to sleep” option to Never.
5. Click Save Changes and close the windows.

Note

If you change the computer’s plan, you must also change the display and sleep options to Never for the new plan.

Terminal Server/Terminal Services Considerations

Both Terminal Server and Terminal Services use Remote Desktop Protocol (RDP), which uses a special port (3389). If port 3389 is blocked by a firewall on your server, you can do one of the following:

- RDP operates over TCP port 3389. You can open this port.
- To connect to a specific system on your LAN: Configure Port Forwarding on the firewall to send traffic from port 3389 to the computer with which you want to connect.

Cross-Language Installations

When SMS is installed on an operating system that does not use the same language (such as French SMS on an English operating system), it is a cross-language installation. If you will have a cross-language installation, you must ensure that the regional settings will display correctly for your language. To do this, log on to the SMS server computer *before you install SMS* with the administrator account that will be used to run the Windows services. Set the regional settings for that account. During installation, when you are prompted for an account to run SMS as Windows service, use this account.

Popup Blockers

If you are using certain popup blockers (such as from Google or Yahoo), certain SMS popup screens may not be able to display. Examples are the real-time trend screen and the screen notifying you that the maximum number of browser connections has been met. To ensure that these SMS popup windows display correctly, set the blocker to allow popup windows from the SMS server address to display.

Font Setting/Viewing from the Browser

Certain computers have a wide screen, or wide aspect ratio display, option. If these computers are set for “large fonts” (in the Display screen of the Control Panel), screens will not display correctly in the SMS browser. If SMS screens are cut off in the browser view, please check the font setting for that computer.

Alarm Log Size

Although you set a maximum number of alarms to be viewed in the SMS browser window, you also set a maximum in SMS Setup. If you set a limit in the browser (System tab > User Preferences) that is greater than the one in SMS Setup, the alarm log viewed in the browser will be smaller than expected. (There is a limit of 1,000 alarms in the browser.)

IIS Log File Size

You must install IIS (Internet Information Services) on the SMS server computer to be able to serve web pages to remote clients. IIS periodically writes log files to this location: c:\Windows\System32\Logfiles\W3SVC1. These files are not automatically deleted or FIFO'd, and over time, they can take up significant hard disk space. To ensure they do not cause problems, you could periodically delete or archive older files. For installation instructions, see "Installing IIS, ASP, ASP.Net, and MSMQ" on page 13.

Customizing SMS

You can replace the SMS banner and About box with your own graphics. See "Customizing the About Box Icon and Banner" on page 60.

You can add your own documents and web links to those that are already part of the SMS browser. For instructions, see "Storing Document Files and Web Links" on page 61.

Server Restarts

Whenever you restart your SMS server computer (for example, for SMS updates or Windows OS updates), you must follow these steps:

1. Notify all SMS remote users to shut down their SMS browser connections.
2. After all browser connections are shut down, restart the SMS server computer.
3. The remote users can reconnect to the server.

If the server computer restarts unexpectedly before clients can shut down their SMS sessions (for example, unexpected power outages), all clients must still shut down their browsers. You must manually restart the server computer after all clients have shut down.

New Installations

This chapter explains how to install the following Microsoft tools:

- Internet Information Services (IIS)
- Active Server Pages (ASP) and ASP.Net
- Microsoft Message Queuing component (MSMQ)

There are also instructions for installing Terminal Server/Terminal Services and SMS.

Before you begin, ensure that you have all of the prerequisites listed in “Prerequisites” on page 3, and that you have installed and activated IIS and ASP.Net; then follow the instructions to install SMS for the first time.

See the separate new installation instructions for each product:

- “Installing System Manager PE” on page 20
- “Installing System Manager DL or System Manager SE” on page 28

If you are upgrading from an earlier version, see “Upgrade Installations” on page 33.

SMS Licensing Requirements

Each SMS product provides an SMS client access license (SMS CAL). These licenses permit a specified number of simultaneous browser connections. You can purchase additional licenses, providing more simultaneous connections. The SMS CAL requirements are as follows:

System Manager DL and System Manager SE:

The SMS CAL permits only one browser connection. You can purchase an optional product, WebXTR, that offers five additional simultaneous browser connections.

System Manager PE:

The SMS CAL permits ten simultaneous remote browser connections. You can purchase additional licenses (each license adds five remote browser connections).

Installing IIS, ASP, ASP.Net, and MSMQ

Internet Information Services (IIS) enables SMS to serve web pages to its browser clients. You must install IIS on the SMS server computer before you install SMS.

Active Server Pages (ASP) and **Active Server Pages for .Net Framework (ASP.Net)** are two Microsoft products. They provide rich web-client data to system users when the SMS server is installed.

- In Windows 2000 Professional, Windows 2000 Server, and Windows XP: ASP is automatically installed and enabled when IIS is installed. ASP.Net is installed and enabled during the SMS Launchpad installation.
- In Windows Vista and Windows Server 2008: You enable ASP and ASP.NET simultaneously.
- In Windows Server 2003: You must install ASP, ASP.Net, and IIS simultaneously; you then enable ASP.Net separately.

Microsoft Message Queuing component (MSMQ) is used for internal communication within SMS. You will install MSMQ when you enable ASP, ASP.NET, and IIS.

Windows 2000 Professional (SMS SE and SMS DL upgrades to SMS 4.0, SU3 only)

1. Insert the Windows 2000 installation CD in the computer's CD-ROM drive.
2. Click Start > Settings > Control Panel > Add/Remove Programs. On the left side of the Add/Remove Programs window, click Add/Remove Windows Components.
3. When the Windows Components Wizard window displays, check:
 - Internet Information Services (IIS)
 - Message Queuing Services
4. Click Next.
Progress messages display while the updates are being made.
5. When the process is complete, click Finish; close the Add or Remove Programs screen.

Windows XP

1. Insert the Windows XP installation CD in the computer's CD-ROM drive.
2. Click Start > Control Panel > Add or Remove Programs. On the left side of the Add/Remove Programs window, click Add/Remove Windows Components.
3. When the Windows Components Wizard screen displays, check:
 - Internet Information Services (IIS)
 - Message Queuing Services
4. Click Next.
5. When the process is complete, click Finish; close the Add or Remove Programs screen.

Windows 2000 Server/Windows 2000 Advanced Server (SMS SE / DL upgrades to SMS 4.0, SU3 only)

1. Insert the Windows 2000 installation CD in the computer's CD-ROM drive.
2. Click Start > Settings > Control Panel. Double click Add/Remove Programs. On the left side of the Add/Remove Programs screen, click Add/Remove Windows Components.
3. When the Windows Components Wizard screen displays, check:
 - Internet Information Services (IIS)
 - Message Queuing Services
4. Click Next.
5. At the Terminal Services Setup screen, check "Application Server mode." Click Next.
6. At the next screen, check "Permissions compatible with Terminal Server 4.0 Users." Click Next.
7. If a screen displays with a list of applications that may not work after installation, make a note of these applications (you may need to reinstall them later). Click Next.
8. When the process is complete, click Finish; close the Add or Remove Programs screen.

Note

After Terminal Server is installed, you must activate its Microsoft license. Directions for purchasing licensing components are on the Microsoft website (www.Microsoft.com). During the trial period that begins at installation, you have a temporary Terminal Services Client Access License (TSCAL) that provides remote browser access to SMS Setup. If you do not activate the license server by the end of this period, remote clients will be unable to view SMS Setup.

Windows Vista

1. Add the computer to "Trusted Sites":
 - a. Click Tools > Internet Options > Security > Trusted Sites. Click the Sites button.
 - b. Uncheck "Require server verification (https:) for all sites in this zone."
 - c. In the "Add this Web site to the zone" field, type the name of the computer you are using. For example, if the computer name is "admin1," type "admin1" in this field. Click Add, then click OK. Close the Trusted Sites window.
2. Enable the ActiveX features:
 - a. While still viewing the Internet Options window, click "Custom Level."
 - b. Scroll down to the ActiveX controls and plug-ins.
 - c. Click Enable for every feature under the ActiveX controls and plug-ins node.
 - d. Click OK, then click Yes to verify and click Apply to save the changes.
3. Open the Control Panel and double-click User Accounts.
4. At the "Turn User Account On or Off" field: turn the account OFF.
5. Restart the computer. At the Windows login screen, **you must log in with a Windows Administrator password.**
6. To enable IIS and MSMQ, open the Control Panel and double-click Programs and Features. On the left-hand side of the screen, click "Turn Windows Features On or Off."

At the Windows Features screen, check the following features:

First, open the Internet Information Services node.

Under *IIS 6 Management Compatibility*, check all of the options:

- IIS 6 Management Console
- IIS 6 Scripting Tools
- IIS 6 WMI Compatibility
- IIS Metabase and IIS 6 configuration compatibility

Under *World Wide Web Services*, check:

- Application Development Features
 - .NET Extensibility
 - ASP
 - ASP.NET
 - ISAPI Extensions
 - ISAPI Filters
- Common Http Features
 - Default Document
 - Static Content
- Security
 - Request Filtering

Open the Microsoft Message Queue (MSMQ) Server node.

Under *Microsoft Message Queue (MSMQ) Server Core*, check:

- MSMQ Active Directory Domain Services Integration

7. Close the Windows Features window. If prompted to do so, restart the computer. At the Windows login screen, ***you must log in with a Windows Administrator password.***

Windows Server 2003

1. Add the computer to "Trusted Sites":
 - a. Click Tools > Internet Options > Security > Trusted Sites. Click the Sites button.
 - b. Uncheck "Require server verification (https:) for all sites in this zone."
 - c. In the "Add this Web site to the zone" field, type the name of the computer you are using. For example, if the computer name is "admin1," type "admin1" in this field. Click Add, then click OK. Close the Trusted Sites window.
2. Enable the ActiveX features:
 - a. While still viewing the Internet Options window, click "Custom Level."
 - b. Scroll down to the ActiveX controls and plug-ins.
 - c. Click Enable for every feature under the ActiveX controls and plug-ins node.
 - d. Click OK, then click Yes to verify and click Apply to save the changes.
3. Insert the Windows 2003 installation CD in the computer's CD-ROM drive.
4. Click Start > Settings > Control Panel. Double-click Add or Remove Programs. On the left side of the Add or Remove Programs window, click Add/Remove Windows Components.
5. When the Windows Components Wizard screen displays, check Application Server, then click Details.
6. When the Application Server screen displays, check the following items (do not change any other items):
 - Application Server Console
 - ASP.NET
 - Enable Network COM+ Access
 - Internet Information Services (IIS)
 - Message Queuing
7. Click OK, then click Next.
8. If you are prompted to insert the Windows CD to locate a file, insert the operating system CD for your Windows application. Then browse to locate the folder called I386. In that folder, choose the file that displays on the prompt screen. Click Open, then click Retry. After the install is complete, click Finish.
9. Close the Add or Remove Programs screen and the Control Panel.

ASP, ASP.Net, IIS, and MSMQ are installed. Follow the steps in the next section to enable ASP.Net.

Enabling ASP.Net on Windows Server 2003

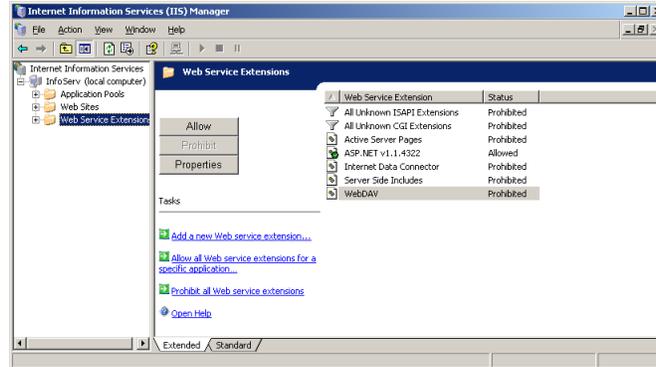
After you have installed ASP, ASP.Net, and IIS on the Windows 2003 Server, you must enable ASP.Net. Follow these steps:

1. Click Start > Settings > Control Panel. Double-click Administrative Tools. Double-click Internet Information Services (IIS) Manager.

The Internet Information Services (IIS) Manager screen displays.

2. From the left-hand pane of the screen, click the “+” next to the name of the local computer. Double-click Web Service Extensions in the right-hand pane.

The screen displays Web Service Extensions details:.



3. In the right-hand pane, check the status of Active Server Pages and ASP.NET. If either status is Prohibited, right-click the item name, and change the status to Allowed.
4. Close the Internet Information Services (IIS) Manager screen and the Administrative Tools window.

ASP.Net is now enabled. If you want to install Terminal Server or Terminal Services, do so after you install SMS. For instructions on installing Terminal Server/Terminal Services, see “Installing Terminal Server” on page 23.

Windows Server 2008

1. Add the computer to “Trusted Sites”:
 - a. From the Control panel, click Internet Options to open the Internet Properties window. From the Security tab, select Trusted sites. Click the Sites button.
 - b. On the Trusted sites screen, uncheck “Require server verification (https:) for all sites in this zone.”
 - c. In the “Add this Web site to the zone” field, type the name of the computer you are using. For example, if the computer name is “admin1,” type “admin1” in this field. Click Add, then close the Trusted Sites window.
2. Enable the ActiveX features:
 - a. While still viewing the Security tab, click “Custom level.”

*NOTE: This field is grayed out by default. To enable the field, you need to first disable the User Account Control feature:
From the Control Panel, open User Accounts. Click “Turn User Account Control on or off. Deselect “User Account Control (UAC) to help protect your computer.” When the action is complete, you will need to restart the computer.*
 - b. From the Security Settings window, scroll down to the ActiveX controls and plug-ins.
 - c. Click Enable for every feature under the ActiveX controls and plug-ins node.
 - d. Click OK, then click Yes to verify the changes. When the Security tab displays again, click OK.
3. Still viewing the Control Panel: Open Programs and Features.
4. On the left side of the page, click Turn Windows features on or off.

5. From the left side of the Server manager screen, highlight Roles.
6. On the right side of the page, under Roles Summary, click Add Roles.
7. At the Add Roles Wizard screen, click Next.
8. At the Select Server Roles screen, select:
 - Application Server
 - Web Server (IIS)Click Next at the next two prompts.
9. At the Select Role Services screen, select Message Queuing Activation. Click Next.
10. At the Web Server (IIS) screen, click Next.
11. At the next Select Role Services screen, make sure that at least the following options are checked, though you may check additional options (in some cases, you are prompted to confirm that you want to add required services; click Add Required Role Services):
 - Static Content
 - Default Document
 - ASP.NET
 - .NET Extensibility
 - ASP
 - ISAPI Extensions
 - ISAPI Filters
 - Request Filtering
 - IIS 6 Management Compatibility (allow it to auto-select options below it)
12. Click Next.
13. Click Install.

Run Windows Update

After IIS and ASP are installed and ASP is enabled, run the Microsoft Windows Update option on the Microsoft website. This ensures that the most recent updates are applied for your operating system.

When a Windows update is installed, certain SMS services may be stopped; thus you should not set your Windows Update feature to perform automatic updates. When setting the Automatic Updates Feature, check an option that allows you to choose when to install the updates. Then you can install them at a time that will not disrupt your use of SMS. After you install the updates, restart the SMS server computer to ensure that all of the services are running. If you are unsure how to perform these tasks, please contact your IT department for help.

Installing SMS on a Virtual Machine (SMS PE Only)

See the table below for additional hardware/software requirements that are specific to the computer that hosts the virtual machine.

Creation and use of virtual machines should be managed and deployed by the appropriate personnel in your organization. The person managing and deploying virtual machines must be familiar with VMWare and be able to use it to create and use the virtual environment.

Hardware/Software Requirements when Hosting a Virtual Machine

Option	Setting
Operating System	Microsoft Windows Server 2003 R2, Standard Edition
Processor(s)	Single Processor
RAM	1024 MB
Hard Drive Size	60 GB
Network Configuration	Bridged
VM Format	VMWare ESX Server 2.x
Virus Protection	To be installed by customer
Backup Software	To be installed by customer

Installing the Software

1. Prepare the computer:
 - a. Verify that the computer meets hardware and software requirements. This includes the requirements in the table above, as well as the requirements in "Prerequisites" on page 3.
 - b. Ensure that the computer has the VMWare environment installed.
2. To learn about specific settings you need to make, review the *SMS Installation Notes* and "Introduction" on page 1, in this *Setup Guide*.
3. Install SMSPE, following the instructions for new installations in "Installing System Manager PE" on page 20.
4. For instructions about launching and using SMS, see "Using SMS" on page 55.

Installing System Manager PE

Follow these instructions to install System Manager PE on Windows 2003 Server, Windows Server 2008, or Windows XP. When there are differences between the installs, you will see notes explaining the procedure for your operating system or SMS product.

The installation DVD includes installation files for the following products: System Manager PE, .NET Framework 3.5 SP1, Advanced Reports, and SQL 2005.

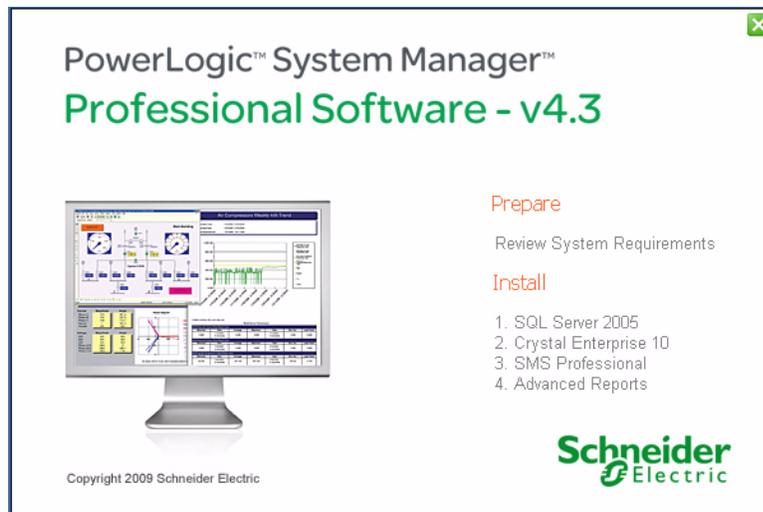
Notes

We support SQL 2005 Standard and Express editions, but not the Enterprise edition. All SQL licenses are issued for the CPU, not by device or user. We use Windows Authentication for SQL passwords.

1. Insert the *SMS Professional Edition v 4.3 (SMSPE_43)* disk in the DVD drive of the SMS server computer.

If you have disabled your computer's autorun feature, you will need to launch the installation manually. To do this, click Start > Run, then browse to locate the DVD named *SMSPE43*. Double-click *setup.hta*. At the Run screen, click OK.

The launchpad screen displays:



2. Click the link called *Review System Requirements*. A page displays listing the hardware and software pre-requisites. Please be sure that your computer meets these requirements before you continue the install.

Installing SQL Server 2005

3. Click SQL Server 2005.

NOTE: SMS supports SQL 2005 Standard and Express editions.

If you have not installed all of the requirements, the SMS Prerequisites screen displays. It lists the missing system requirements. Click Next to exit the installation; complete the requirements, then begin the installation again.

4. At the Welcome screen, click Next.

5. When the License Agreement screen displays, read the license agreement to be sure you accept its terms. If you want to print a copy of the text, click Print; the text prints at the default printer. Click "I accept the terms of the license agreement," then click Next.
6. At the Select a Drive screen, choose the drive on which you want to install SQL 2005, or accept the default of C. Click Next.
7. At the Start Copying Files screen, click Install
While SQL 2005 is installed, you see a series of progress messages. This will take several minutes.
8. When SQL 2005 installation is finished, click Finish.

Installing Crystal Enterprise 10

9. When the launchpad screen displays again, click Crystal Enterprise 10.
10. At the Welcome screen, click Next.
11. At the Ready to Install the Program screen, click Install.

Crystal Enterprise installation begins. It will take several minutes.

12. When installation is complete, click Finish.

Installing SMS Professional

13. When the launchpad screen displays again, click SMS Professional.
14. When the Welcome screen displays, click Next.
15. When the License Agreement screen displays, read the license agreement to be sure you accept its terms. If you want to print a copy of the text, click Print; the text prints at the default printer. To continue the installation, click Yes. To terminate the installation, click No.

The Customer Information screen displays.

16. Enter a user name and company name. This is simply to register the software. The user name does not need to match any other SMS or Windows information). Enter the serial number, which is found on the DVD case and on a card packed inside the software box. Click Next.

The Select a Drive screen displays.

17. Select the location for installing SMS. Click Next.
18. At the SMS Account Setup screen, you must add one level 1 (Administrator) account for SMS. You will use this user name and password when you log on to SMS, both SMS Setup and through the browser. This is not a Windows password.

Type the user name and the password, then confirm the password. Click Next.

19. At the Ready to Install the Program screen, click Install.

While SMS is being installed, several progress messages display. This will take several minutes.

Note

If a message displays telling you to add a Windows Administrator account to the IIS_WPG (IIS Worker Process Group), you need to do this before you continue the installation. Instructions are found in Step 1 of "Prerequisites" on page 3. You do not need to exit the SMS installation to add this account. After you have finished, continue with the steps below.

20. If the prompt about the IIS_WPG displayed, click OK.

21. At the Run Mode screen, you choose whether you will run SMS as a Windows service. When you run SMS as a service, the SMS server automatically restarts every time the server computer is restarted. *To ensure that data is always available to remote browsers, we strongly recommend that you run SMS as a service.*

To run SMS as a Windows service: Do not check the box at the top of the screen. Enter a Windows administrator account (or select an account from the list in the box). The account cannot have a blank password: enter the account's password, then retype the password to verify it. This account is used to synchronize the Windows account with SMS components.

For Cross-Language Installations: If you are running SMS on an operating system that does not use the same language (such as French SMS on an English operating system), you need to enter the administrator account that you have specified for this purpose (see "Cross-Language Installations" on page 10).

If you are installing SMS on a computer that has Windows Server 2003 or Windows Server 2008 as its operating system, you must enter a Windows Administrator account that is also a member of the IIS_WPG.

22. After you type the account and password, click Next.
23. When the install is finished, click *Finish*.
24. When the launchpad displays again, click *Advanced Reports*.
25. When the welcome screen displays, click *Next*.

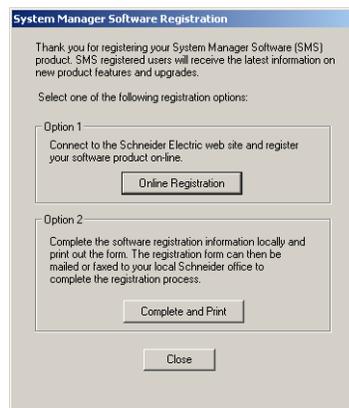
Installing Advanced Reports

26. When the License Agreement screen displays, read the license agreement to be sure you accept its terms. If you want to print a copy of the text, click Print; the text prints at the default printer. To continue the installation, click *Yes*. To terminate the installation, click *No*.
27. At the Ready to Install the Program screen, click *Install*.

Progress screens display while Advanced Reports is being installed.

28. When the Machine Reboot Required message displays, click OK. At the Windows login screen, ***you must log in with a Windows Administrator password.***

When the computer restarts, the System Manager Software Registration Form dialog displays:



29. Have your SMS product serial number available before you begin. The serial number, is printed on the DVD case and on a card that is in your software package.

30. To register your SMS software, click one of the option buttons:

- **Online Registration.** Click this button to launch your Internet browser and display the online registration form. Follow instructions to complete the form. Click *Next* to review the information that you enter. When the information is correct, click *Submit* to send it. Close your browser, and close the Registration window.
- **Complete and Print.** Click this button to display a copy of the registration form. Complete the fields online; then print the completed form. Close the registration form window and the Registration window. Fax or mail the completed form to your local Schneider Electric representative.
- **To register at a later time,** click Close. The software registration form will display when you restart your computer. If you close the dialog without registering, you can access the form on your computer at Start > Programs > POWERLOGIC > DOCS > Registration.

SMS is now installed. Remember to install any missing components.

For help in starting SMS, see “Accessing SMS” on page 55.

Remember to set the Windows Automatic Update feature to allow you to manually update. See “Run Windows Update” on page 18.

Installing Terminal Server

Terminal Server is a Microsoft component that is required for accessing the SMS Setup Utility, via the browser, from a remote computer. Only System Manager PE supports this remote browser connection. You will install Terminal Server on Windows Server 2003 and Windows Server 2008. After you install Terminal Server, you must contact Microsoft to purchase all applicable server and client licensing components.

Terminal Server on Windows Server 2003

Windows Server 2003: Reinstalling Terminal Server

If your SMS server is using Microsoft 2003 Server operating system AND Terminal Server was installed on the server computer before you installed SMS, you had to uninstall it. Now is the time to re-install Terminal Server:

1. Click Start > Settings > Control Panel > Add or Remove Programs.
2. At the Add or Remove Components screen, click Add/Remove Windows Components.
3. At the Windows Components window, check Terminal Server.
4. Close the Add/Remove Windows Components and the Control Panel.

Windows Server 2003: Installing Terminal Server

Follow these instructions to install Terminal Server on a Windows Server 2003 operation system:

Note

If prompted during the installation, insert the Windows 2003 installation CD in the computer's CD-ROM drive.

1. Click Start > Control Panel. Double-click Add or Remove Programs. On the left side of the Add or Remove Programs window, click Add/Remove Windows Components.
2. When the Windows Components Wizard screen displays, check Terminal Server, then click Next.

3. When the Terminal Server licensing screen displays, read the information on the screen, then click Next.
4. At the next screen, choose the appropriate option:
 - If you have purchased a Terminal Server client access license (TSCAL), check “Use these license servers.” Type the license server name or IP address.
 - If there is a licensed server set up, but you do not know its name or IP address, click “Use automatically discovered license servers.”
 - If you still need to purchase the TSCAL(s), you can still use Terminal Server for a limited time. To do this, click “I will specify a license server within 120 days.”Click Next.

Note

After Terminal Server is installed, you must activate its Microsoft license. Directions for purchasing licensing components are on the Microsoft website (www.Microsoft.com). During the trial period that begins at installation, you have a temporary Terminal Server Client Access License (TSCAL) that provides remote browser access to SMS Setup. If you have not activated the license server by the end of this period, no remote client will be able to view SMS Setup.

5. At the next screen, choose the correct option for your installation:
 - If the client access license is to apply to devices only, click “Per Device licensing mode.”
 - If the client access license is to apply to users, and not devices, click “Per User licensing mode.”Click Next. Click Finish.

Windows Server 2003: Special Terminal Services Settings

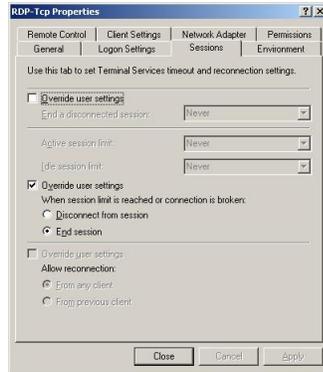
After you complete the SMS installation on any server operating system (Windows Server 2003), you must make some changes to the Terminal Services configuration. The following paragraphs describe the changes and the locations where they are to be made. All of these settings are made in Terminal Services Configuration.

1. To begin, open the Administrative Tools folder (from the Control Panel, click Administrative Tools), then double-click Terminal Services Configuration to display the Terminal Services Configuration\Connections screen.
2. Highlight the Connections folder in the left pane of the Terminal Services Configuration screen. From the right pane, right-click RDP/TCP and select Properties.

The RDP-TCP Properties screen displays.

Override User Settings

3. Click the **Sessions** tab:



4. Check the second “Override User Settings” box. Then select “End session.” Click Apply.

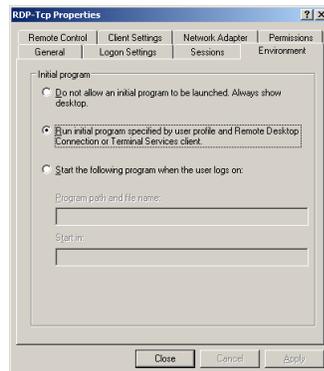
These settings are necessary; they ensure that the SMS Setup client connections are properly closed when the browser is closed.

Note

If you do not check these boxes, memory usage will continue to increase, which could result in severe performance problems.

Initial Program Settings

5. Click the **Environment** tab:



These settings cause remote computers to use the Terminal Services version of the SMS Setup client.

6. Make the following changes to this tab:
 - Check the box: “Start the following program when the user logs on.:
 - In the Program path and file name field, enter the SMS installation directory, followed by \Bin\SMSSetupTS.exe. For example, if the installation directory is on your C drive, it would read:

C:\POWERLOGIC\SMS\Bin\SMSSetupTS.exe

— In the Start in field, enter the SMS installation directory, followed by \Bin. Click Apply.

For example, if the installation directory is on your C drive, it would read:

C:\POWERLOGIC\SMS\bin

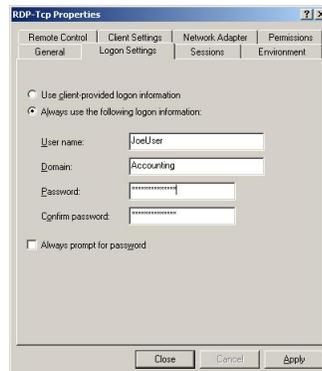
Click Apply.

Note

Do not use the full client version, (SMSSetupUtil.exe), which can result in severe performance problems.

Optional Windows Logon Bypass

7. Click the **Logon Settings** tab):



This option allows you to maintain one of two security levels, for users who are accessing the SMS Setup client via the browser:

- The default setting (“Use client-provided logon information”), offers greater security. It requires all users to log into Windows before they can establish a browser connection as a SMS Setup client.
- The alternate setting (“Always use the following logon information”) lets you establish a custom Windows account, which will be used as a default every time a user connects as SMS Setup client through the browser. Although users will not be prompted for a Windows user account when they access SMS, they will be prompted for their SMS user ID and password.

If you check the “Always prompt for password” box, users will not be prompted for a Windows user account; however, they must enter the associated password for the default account.

In order to bypass Windows logon, check the box “Always use the following logon information.” Enter a valid Windows user ID, domain, and password.

Click Apply if make any changes, then click Close to exit Terminal Server configuration.

Remember that you must contact Microsoft to purchase all applicable server and client licensing components for Terminal Server.

Installing Terminal Server on Windows Server 2008

If your SMS server is using a Windows Server 2008 operating system AND Terminal Server was installed on the server computer before you installed SMS, you had to uninstall it. Now is the time to re-install Terminal Server. Follow the steps below whether you are reinstalling Terminal Server or installing Terminal Server for the first time.

Note

If prompted during the installation, insert the Windows 2003 installation CD in the computer's CD-ROM drive.

1. Click Start > Control Panel. Then double-click Programs and Features.
2. On the left side of the page, click Turn Windows features on or off.
3. From the left side of the Server Manager screen, highlight Roles.
4. On the right side of the page, under Roles Summary, click Add Roles.
5. If prompted to verify that the Administrator account and other settings are correct, verify that you have followed the recommendations. If so, click Next.
6. From the Select Server Roles screen, highlight Terminal Services, then click Next.
7. At the next screen, read the introduction to Terminal Services; click Next.
8. At the Role Services screen, check Terminal Server, then click Next.
9. At the Application Compatibility screen, read the information, then click Next.
10. At the Authentication Method screen, check the authentication method that is appropriate for your installation. Click Next.
11. At the Licensing Mode screen, check the licensing mode that matches the TS CALs that have been purchased for your installation. (Note: If you choose Configure later, you must determine the licensing mode and return to this screen with 120 days. After 120 days, Terminal Services will no longer work without the correct licensing.) Click Next.
12. At the User Groups screen, add the user groups and users that will be allowed to access this terminal server. When the user groups and users are added, click Next.
13. At the Confirm Installation Selections screen, there may be warnings and informational messages (depending on your choices in the previous screens). Read the information and note any steps that may need to take. Click Install.
14. After Terminal Services is installed, click Close, then restart the computer.

Installing System Manager DL or System Manager SE

Note

Except for names at the top of screens, the System Manager DL and System Manager SE installs are the same. These instructions use screen captures for System Manager SE.

The installation DVD includes installation files for the following products: System Manager SE or System Manager DL, GFXWeb, optional installs, SQL 2005 Express, .NET Framework 1.1, and .NET Framework 1.1 SP1.

Note.

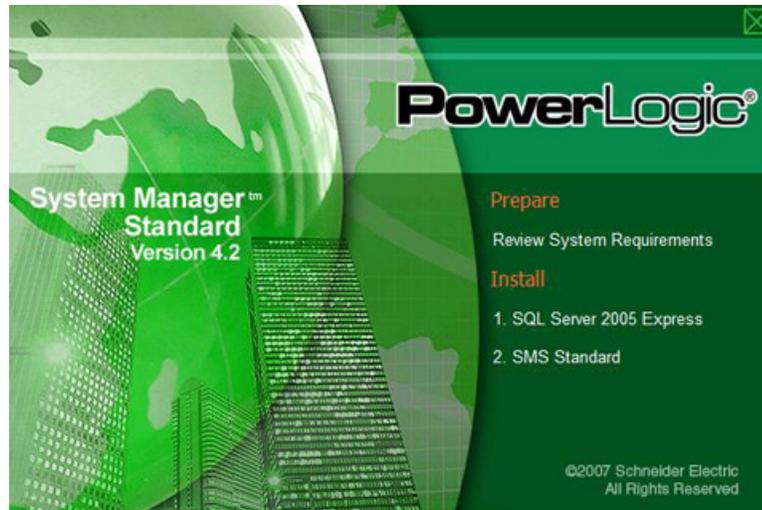
You may choose to run the .NET Framework installation separately. The installation file for .NET Framework is located in the *tools* folder in the SMS main folder (*StandardEditionNew* or *DeviceLimitedEditionNew*).

1. Insert the SMS installation disk in the DVD drive of the SMS computer.

If you have disabled your computer's autorun feature, you will need to launch the installation manually. To do this for Windows XP or Windows Server 2003, click Start > Run, then browse to locate the DVD named *SMSSE42* (for SMS SE) or *SMSDL42* (for SMS DL). For Windows Vista, click Start > All Programs > Accessories > Run. Browse to locate the DVD.

Double-click *setup.hta*. At the Run screen, click OK.

The launchpad screen displays:



2. Click the link called *Review System Requirements*. A page displays listing the hardware and software pre-requisites. Please be sure that your computer meets these requirements before you continue the install.

Installing SQL 2005 Express

3. Click SQL Server 2005 Express.

If you have not installed all of the requirements, the SMS Prerequisites screen displays. It lists the missing system requirements. Click Next to exit the installation; complete the requirements, then begin the installation again.

4. At the Welcome screen, click Next.
5. When the License Agreement screen displays, read the license agreement to be sure you accept its terms. If you want to print a copy of the text, click Print; the text prints at the default printer. Click "I accept the terms of the license agreement," then click Next.
6. At the Setup Type screen, specify the SA password to be used with SQL. Accept the default of DBMaster, or click No to enter a different password. Click Next.

If you click No, you are prompted to enter and confirm the new password.

7. At the Start Copying Files screen, click Next.

After several seconds, a setup progress box appears. It displays a series of messages. This will take several minutes.

8. When the SQL 2005 Express installation is complete, click Finish.

Installing SMS SE or SMS DL

9. When the launchpad screen displays again, click the SMS link for your product (SMS Standard or SMS Device Limited).

10. When the Welcome screen displays, click Next.

11. When the License Agreement screen displays, read the license agreement to be sure you accept its terms. If you want to print a copy of the text, click Print; the text prints at the default printer. To continue the installation, click Yes. To terminate the installation, click No.

The Customer Information screen displays.

12. Enter a user name and company name. This is simply to register the software. The user name does not need to match any other SMS or Windows information). Enter the serial number, which is found on the DVD case and on a card packed inside the software box. Click Next.

The Select a Drive screen displays.

13. Select the location for installing SMS. Click Next.

14. At the SMS Account Setup screen, you must add one level 1 (Administrator) account for SMS. You will use this user name and password when you log on to SMS, both SMS Setup and through the browser. This is not a Windows password.

Type the user name and the password, then confirm the password. Click Next.

15. At the Ready to Install the Program screen, click Install.

While SMS is being installed, several progress messages display. This could take several minutes.

The Windows Account information screen displays. This account will be used to schedule reports; make a note of the account and password that you enter for future use.

16. Enter a Windows Administrator account and password, and confirm the password; then click OK.

Note

If a message displays telling you to add a Windows Administrator account to the IIS_WPG (IIS Worker Process Group), you need to do this before you continue the installation. Instructions are found in Step 1 of “Prerequisites” on page 3. You do not need to exit the SMS installation to add this account. After you have finished, return to this installation and continue with the steps below.

17. If the prompt about the IIS_WPG displayed, ensure that this account has been added to the IIS_WPG, then return to this installation and click OK.
18. At the Run Mode screen, you choose whether you will run SMS as a Windows service. When you run SMS as a service, the SMS server automatically restarts every time the server computer is restarted. *To ensure that data is always available to remote browsers, we strongly recommend that you run SMS as a service.*

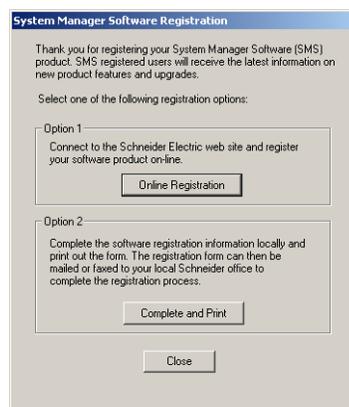
To run SMS as a Windows service: Do not check the box at the top of the screen. Enter a Windows administrator account (or select an account from the list in the box). The account cannot have a blank password: enter the account’s password, then retype the password to verify it. This account is used to synchronize the Windows account with SMS components.

For Cross-Language Installations: If you are running SMS on an operating system that does not use the same language (such as French SMS on an English operating system), you need to enter the administrator account that you have specified for this purpose (see “Cross-Language Installations” on page 10).

If you are installing SMS on a computer that has Server 2003 or Windows Vista as its operating system, you must enter a Windows Administrator account that is also a member of the IIS_WPG.

19. After you type the account and password, click Next.
20. When the Machine Reboot Required message displays, click OK. At the Windows login screen, **you must log in with a Windows Administrator password.**

When the computer restarts, the System Manager Software Registration Form dialog displays:



21. Have your SMS product serial number available before you begin. The serial number, is printed on the DVD case and on a card that is in your software package.

22. To register your SMS software, click one of the option buttons:

- **Online Registration.** Click this button to launch your Internet browser and display the online registration form. Follow instructions to complete the form. Click *Next* to review the information that you enter. When the information is correct, click *Submit* to send it. Close your browser, and close the Registration window.
- **Complete and Print.** Click this button to display a copy of the registration form. Complete the fields online; then print the completed form. Close the registration form window and the Registration window. Fax or mail the completed form to your local Schneider Electric representative.
- **To register at a later time,** click Close. The software registration form will display when you restart your computer. If you close the dialog without registering, you can access the form on your computer at Start > Programs > POWERLOGIC > DOCS > Registration.

SMS is now installed. Remember to install any missing components.

For help in starting SMS, see “Accessing SMS” on page 55.

Remember to set the Windows Automatic Update feature to allow you to manually update. See “Run Windows Update” on page 18.

Uninstalling and Reinstalling SMS

Never uninstall or reinstall MSDE or SQL. Doing so could destroy the data in your database.

Do not attempt to uninstall SMS through a Terminal Services or Terminal Server connection.

To uninstall SMS and its components, do the following:

1. Have all users close out of their browser sessions.
2. Disconnect the network cable from the server computer (to ensure that no one connects from a remote computer while you are uninstalling).
3. Shut down SMS Setup and the SMS Configuration Utility. If you are not running the PowerLogic Network Server as a Windows service, close it, too.
4. Browse to this location on the server computer’s hard drive:

SMS 4.2 or 4.3

c:\Program Files\Common Files\Square D Shared\SMS_Uninstall.

SMS 4.0 SU2 or SU3

c:\Program Files\Common Files\Square D Shared\Launchpad\Uninstall.

5. Double-click setup.exe.
6. (SMS 4.0 SU2, SU3, and 4.2 only): If you have changed the SQL password since SMS was installed, the SQL Account Request screen displays. Enter the new password, then click Next.
7. When the Uninstall screen displays, click Next.
8. When the Directories to Delete screen displays, click Next.
9. When the Begin Uninstall screen displays, click Next.
10. Several messages display while the SMS files are being uninstalled. Then the Reboot Required screen displays.

11. Before you restart the computer, close all running applications and Windows Explorer.
12. Click OK at the Reboot Required screen.
13. After you complete the uninstall procedure, reconnect the network cable to the server computer.

Reinstalling SMS

To reinstall all of SMS and its components, do the following:

1. Have all users close out of their browser sessions.
2. Disconnect the network cable from the server computer (to ensure that no one connects from a remote computer while you are reinstalling).
3. Shut down SMS Setup and the SMS Configuration Utility. If you are not running the PowerLogic Network Server as a Windows service, close it, too.
4. Insert the *SMSPE* DVD in the DVD drive of the SMS server computer.
5. Using the Launchpad, install the appropriate components (if .NET Framework was not uninstalled, skip the .NET Framework steps).
NOTE: Remember: Do NOT reinstall MSDE; the data in your database could be overwritten.
6. If you have purchased the GFX add-on software, reinstall it from the CD that was shipped with your GFX order.
7. Install the add-on:
 - Go to Add/Remove Programs; click Add New Programs.
 - Click CD or Floppy. Use the wizard to select and set up the product(s) you are adding.
8. Reconnect the network cable and restart the computer.

Upgrade Installations

This chapter explains how to upgrade your SMS product. If you are upgrading an SMS PE product, you will upgrade to SMS version 4.3 (SMS 4.3). If you are upgrading either an SMS SE or SMS DL product, you will upgrade to SMS version 4.0, Service Update 1 (SMS 4.0, SU1).

SMS PE can upgrade from any of these products:

- SMS 3.3.2.3 (requires a separate upgrade kit)
- SMS 4.0, SU1 (requires a download from the Powerlogic.com website)
- SMS 4.0, SU2/SU3
- SMS 4.2

SMS SE and SMS DL can upgrade from either of these products:

- SMS version 3.3.2.3
- SMS version 4.0

There are also instructions for installing additional products, such as SQL Service Pack 3, and instructions for uninstalling or reinstalling SMS.

Before you begin, ensure that you have all of the prerequisites listed in "Prerequisites" on page 3, and that you have installed and activated IIS and ASP.Net; then follow correct upgrade steps for your upgrade.

SMS DL to SMS SE Upgrade

There is an optional product that you can purchase to upgrade an SMS DL product to SMS SE (SMSDL2SE). If you are interested in purchasing this product, please contact your Schneider Electric representative.

Upgrading SMS PE

Upgrading from SMS PE 4.0 SU2, SMS PE 4.0 SU3, or SMS PE 4.2 to SMS PE 4.3

Use the following instructions to upgrade your installation of SMS Professional (SMS PE) to SMS 4.3.

Check Your Version of SMS

Before you can upgrade to SMS PE 4.3, you must have installed either SMS PE 4.0, SU2, SMS PE 4.0, SU3, or SMS PE 4.2. To verify the SMS version that you have installed on your computer, click Help > About ... at the upper-right hand corner of the SMS client (not the browser) screen.

Upgrading to SMS PE 4.0, SU2 & SU3

If you have version SMS 3.3.2.3 or earlier installed, please contact your local sales representative for an upgrade kit that will upgrade your installation to SMS 4.0, SU2.

If you have version SMS 4.0, SU1 installed, you must download and install SMS 4.0, SU2/SU3. The download file is on the Powerlogic.com website: On the Downloads page, scroll down to the System Manager Service Updates section; click *V4.0 SU2 & SU3*.

The next page includes four tabs:

- **PowerLogic System Manager V4.0 SU3**, which contains a description of the downloads
- **SU2 & SU3 Directions**, which includes an overview of the steps you will take
- **Data Execution Protection (DEP)**, which describes how DEP can affect your system
- **Files**, which lists the downloadable files for this upgrade

When you are ready to run the upgrade, click the Files tab; then click the first file, *SMS_V4_Installation_Notes.pdf*. If you have not yet logged into PowerLogic.com, you will be prompted to do so. Do this before you try to download the files.

To complete the upgrade, download the files; then follow the installation instructions that are included in the installation notes PDF.

After you have upgraded to SMS PE 4.0, SU2 or SU3, see the following instructions to upgrade to SMS PE 4.3.

Installing the SMS PE 4.3 Upgrade

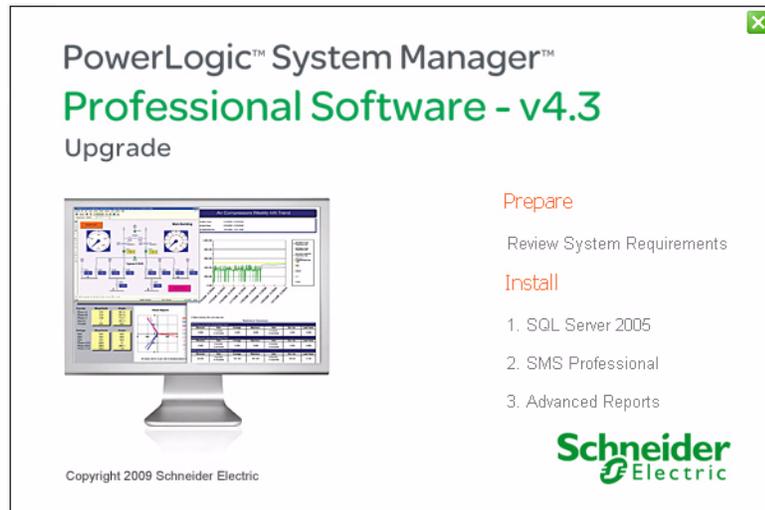
The SMS PE 4.3 upgrade uses a single DVD. This DVD will upgrade the following products:

- SQL 2005
- SMS PE
- Advanced Reports

When either SMS PE 4.0, SU2, SMS PE 4.0, SU3, or SMS PE 4.2 is installed, follow these steps to upgrade to SMS PE 4.3:

1. If you have not already done so, install the .NET Framework 3.5, SP1 (see "Prerequisites" on page 3).
2. Use the Database Services function in SMS to back up the SMS history database.

3. Shut down all SMS software.
4. Insert the DVD entitled "SMS Professional Edition Upgrade" in the computer's DVD drive.
5. If a security warning screen displays (Microsoft Server 2003), click Run.
The launchpad HTML page displays;



6. Click *1. SQL Server 2005*.
7. If a security warning screen displays (Microsoft Server 2003), click Run.
8. At the Welcome screen, click Next.
The Microsoft SQL Server 2005 license screen displays.
9. If you want to print a copy of the text, click Print; the text prints at the default printer. To continue with the install, click the "I accept the terms of the license agreement" radio button, then click Next.
10. At the Start Copying Files screen, click Install.
While SQL 2005 is installed, you see a series of progress messages. This will take several minutes.
11. When SQL 2005 installation is finished, click Finish.
12. When the launchpad screen displays again, click *2. SMS Professional*.
13. If a security warning screen displays (Microsoft Server 2003), click Run.
14. When the Welcome screen displays, click Next.
The Backup Recommendation screen displays.
15. If you have not yet backed up your SMS history data, click No to exit the install. Then use the SMS Database Services function to back up the history database. If you have backed up this database, click Yes.
The SMS license agreement screen displays.
16. Read the license agreement to be sure you accept its terms. If you want to print a copy of the text, click Print; the text prints at the default printer. To continue the installation,

click "I accept the terms of the license agreement," then click *Next*. To terminate the installation, click *Cancel*.

The Customer Information screen displays.

17. Enter a user name and company name. This is simply to register the software. The user name does not need to match any other SMS or Windows information). Click *Next*.

The Database Destination screen displays with a default destination for the SMS database.

18. To change the location, click *Browse*, then choose the desired location for the SMS database. When the correct location displays, click *Next*.

19. When the Ready to Install the Program screen displays, click *Install*.

After a series of messages, the Run Mode screen displays.

20. On this screen, you choose whether you will run SMS as a Windows service. When you run SMS as a service, the SMS server automatically restarts every time the server computer is restarted. *To ensure that data is always available to remote browsers, we strongly recommend that you run SMS as a service.*

To run SMS as a Windows service: Do not check the box at the top of the screen. Enter a Windows administrator account (or select an account from the list in the box). The account cannot have a blank password: enter the account's password, then retype the password to verify it. This account is used to synchronize the Windows account with SMS components.

For Cross-Language Installations: If you are running SMS on an operating system that does not use the same language (such as French SMS on an English operating system), you need to enter the administrator account that you have specified for this purpose (see "Cross-Language Installations" on page 10).

If you are installing SMS on a computer that has Windows Server 2003 or Windows Server 2008 as its operating system, you must enter a Windows Administrator account that is also a member of the IIS Worker Process Group (IIS_WPG group). For instructions on adding a user to the IIS_WPG, see "Prerequisites" on page 3. You do not need to exit the SMS install to add the account to the IIS_WPG.

21. After you type the account and password, click *Next*.
22. When the message displays telling you that SMS has successfully installed, click *OK*.
23. When the launchpad screen displays again, click *3. Advanced Reports*.
24. If a security warning screen displays (Microsoft Server 2003), click *Run*.

If no previous Advanced Reports software is installed on this computer, a message displays telling you that it will be installed. This will install first Crystal Enterprise and then the SMS Advanced Reports software.

25. Click *OK*.
26. At the Welcome screen, click *Next*.
27. At the Ready to Install screen, click *Install*.

Installation of Crystal Enterprise will take several minutes.

28. When the message displays telling you that the Crystal Enterprise installation is complete, click *Finish*.

A series of messages displays while Advanced Reports is prepared for installation.

29. At the Welcome screen, click Next.

The Schneider Electric license agreement displays.

30. Read the license agreement to be sure you accept its terms. If you want to print a copy of the text, click Print; the text prints at the default printer. To continue the installation, click Yes. To terminate the installation, click No.

31. At the Ready to Install the Program screen, click Install.

32. When the Machine Reboot Required message displays, click OK. At the Windows login screen, **you must log in with a Windows Administrator password.**

SMS 4.3 is now installed. For help in starting SMS, see “Accessing SMS” on page 55.

Upgrading From SMS PE 4.0 SU1 to SMS PE 4.0, SU2/SU3

If you have SMS PE 4.0, SU1 on your computer, you must download and install SMS PE 4.0, SU2/SU3 before you can run the SMS PE 4.3 upgrade. The SMS PE 4.0, SU2/SU3 upgrade is located on the Downloads section of the Powerlogic.com website. Follow these steps:

1. When you first access Powerlogic.com, select your country and click *Go*. On the next page, click *Popular Links > Downloads*.
2. On the Downloads page, scroll down to the System Manager Service Updates section; click *V4.0 SU2 & SU3*.

The next page includes four tabs:

- a. **PowerLogic System Manager V4.0 SU3**, which contains a description of the downloads
 - b. **SU2 & SU3 Directions**, which includes an overview of the steps you will take
 - c. **Data Execution Protection (DEP)**, which describes how DEP can affect your system
 - d. **Files**, which lists the downloadable files for this upgrade
3. When you are ready to run the upgrade, click the Files tab; then click the first file, *SMS_V4_Installation_Notes.pdf*. If you have not yet logged into PowerLogic.com, you will be prompted to do so. Do this before you try to download the files.
 4. To complete the upgrade, download the files; then follow the installation instructions that are included in the installation notes PDF.

Upgrading from SMS PE 3.3.2.3 or Earlier to SMS PE 4.3

If you have SMS PE version 3.3.2.3 or earlier on your computer, you need a separate upgrade kit. Please contact your local sales representative for assistance. For installation instructions, see “SMS 3.3.2.3 to SMS 4.0 SU1” on page 43.

Upgrading SMS DL or SMS SE

FROM SMS 4.0 to SMS 4.0 SU1

Note

Except for names at the top of screens, the System Manager DL and System Manager SE installs are exactly the same. These instructions use screen captures for System Manager SE.

SMS 4.0 to SMS 4.0 SU1

Follow these steps to upgrade SMS DL or SE, version 4.0 to SMS DL or SE, version 4.0.1.

1. Use the Database Services function in SMS to back up the SMS history database.
2. Shut down SMS.
3. Insert the *Install Launchpad* disk in the CD-ROM drive of the SMS 4.0 server computer.

If you have disabled your computer's autorun feature, you will need to launch the installation manually. To do this, click Start > Run, then browse to locate the CD named LP_SMSSEU40_1 or LP_SMSDLU40_1.

Double-click *setup.exe*. At the Run screen, click *OK*.

If you are installing on a computer that has Terminal Services or Terminal Server installed (typically Windows 2000 Server or Windows Server 2003), the Terminal Server Install Failure screen displays.

4. Open the Control Panel and click Add/Remove Programs
5. At the Add/Remove Programs screen, click Add New Programs.
6. At the next screen, check CD or Floppy, then click Next.
7. At the Run Installation Program screen, browse to the CD-ROM drive.
8. At the Browse screen, select *setup.exe*; then click Open.
9. When the Run Installation Program displays again, click Next.

If you have not yet installed required components, they will be listed on the Launchpad Prerequisites screen:

- The components that are listed must be installed before you can continue the installation. Make a note of these components, then click Next to exit the install. Install the prerequisites. See "Prerequisites" on page 3 for installation instructions.

If you see Windows Script Host (WSH) v 5.6 in the list, you need to download and install this component. Download the Windows Script Host 5.6 file from the Microsoft website. Double-click the .exe file to install it. Follow the on-screen instructions.

- After all prerequisites are installed, you can restart the installation. After you insert the installation CD, the Welcome screen displays. Click Next.

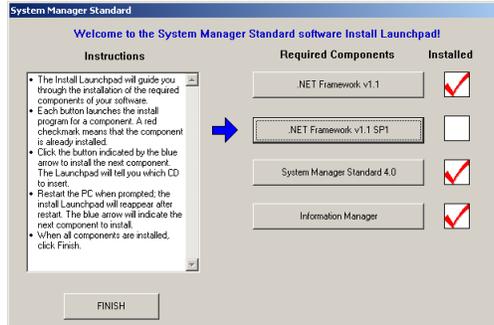
The System Manager Software License Agreement screen displays.

10. Before you continue, read the license agreement to be sure you accept its terms. If you want to print a copy of the text, click Print; the text prints at the default printer.

To continue the installation, click *Yes*. To terminate the installation, click *No*.

11. When the Machine Reboot Required message displays, click OK. At the Windows login screen, **you must log in with a Windows Administrator password.**

After the computer restarts, the Launchpad screen displays:



All components have a red check (are installed) except for .NET Framework v1.1 SP1.

Installing .NET Framework V1.1 SP1

12. Click the .NET Framework v1.1 SP1 button.
13. When prompted to insert the Components CD, remove *Launchpad Disk* and insert *Components* disk in the CD-ROM drive.
14. Click OK.
15. When prompted whether you would like to install .NET Framework, click Yes.

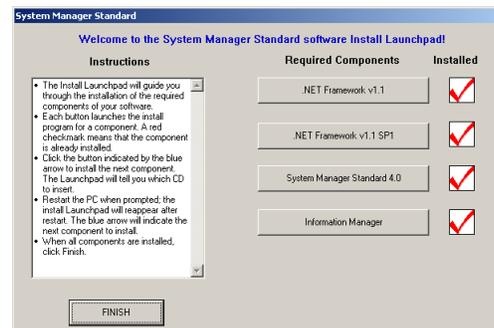
A progress bar displays, followed by the .NET Framework License Agreement screen.

16. If you want to print a copy of the text, click Print; the text prints at the default printer. Click the "I agree" radio button, then click Install.

A progress bar displays, followed by a message telling you that .NET Framework installation is complete.

17. Click OK.

After a series of verification screens, the Launchpad displays again.



18. Click FINISH.

Running SMS as a Windows Service

After several update messages, the About the SMS Account Selection Dialog screen displays. This screen describes the procedure for determining whether SMS will run as a Windows service.

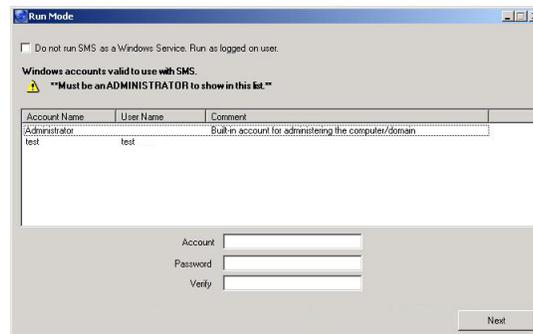
19. Read this information; then click Next.

A message displays asking if you have added the account to the IIS_WPG group. This is done in the Computer Management directory.

20. If the account you will use is not in the IIS_WPG group, click No, and add the account to IIS_WPG; then return to this screen; you do not need to stop the install procedure. For instructions on adding a user to the IIS_WPG, see "Prerequisites" on page 3.

If the account is in the IIS_WPG, click Yes.

The Run Mode screen displays:



21. On this screen, you choose whether you will run SMS as a Windows service. To ensure that data is always available to remote browsers, we strongly recommend that you run SMS as a service. When you run SMS as a service, the SMS server automatically restarts every time the server computer is restarted.

To run SMS as a Windows service: Do not check the box at the top of the screen. Enter a Windows administrator account (or select the account from the list in the box). The account cannot have a blank password: enter the account's password, then retype the password to verify it. This account is used to synchronize the Windows account with SMS components.

For Cross-Language Installations: If you are running SMS on an operating system that does not use the same language (such as French SMS on an English operating system), you need to enter the administrator account that you have specified for this purpose (see "Cross-Language Installations" on page 10).

. If you are installing SMS on a computer that has Windows Server 2003 or Windows Vista as its operating system, you must enter a Windows Administrator account that is also a member of the IIS Worker Process Group (IIS_WPG group). For instructions on adding a user to the IIS_WPG, see "Prerequisites" on page 3. You do not need to exit the SMS installation to add the account to the IIS_WPG.

22. After you type the account and password, click Next.

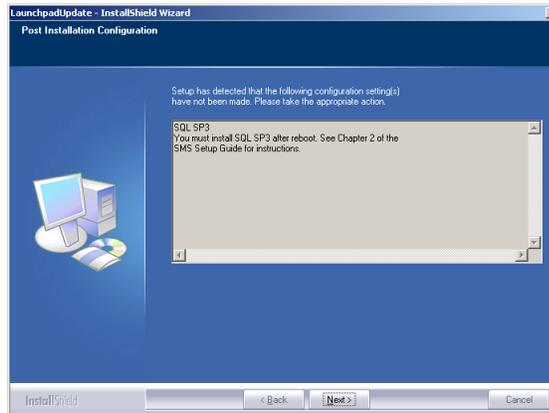
A series of update messages display, which can take several minutes.

A screen may display with a question about the SQL Administration account:



23. This screen displays if your SQL administrator account has a blank password. SMS can change the password to "DBMaster." If you want the blank password changed to DBMaster, click Yes. If you do not want DBMaster as the password, click No (to change the password later, see the Microsoft website for help).

If there are missing components (such as Terminal Services or SQL Service Pack 3), the Post Installation Configuration screen displays:



24. Note the missing items. After you finish installation, be sure to install any missing items. Click Next.

the System Manager Software Registration Form dialog displays:



25. Have your SMS product serial number available before you begin. The serial number, which registers one SMS client access license (browser access), is printed on the CD case and on a card that is in your software package.

Note

To increase the number of simultaneous browser connections, you can purchase an optional product called WebXTR. See your Schneider Electric representative for assistance.

26. To register your SMS software, click one of the option buttons:
- **Online Registration.** Click this button to launch your Internet browser and display the online registration form. Follow instructions to complete the form. Click *Next* to review the information that you enter. When the information is correct, click *Submit* to send it. Close your browser, close the Registration window.
 - **Complete and Print.** Click this button to display a copy of the registration form. Complete the fields online; then print the completed form. Close the registration form window and the Registration window. Fax or mail the completed form to your local Schneider Electric representative.
 - **To register at a later time,** click Close. The software registration form will display when you restart your computer. If you close that dialog without registering, locate the form on your computer at Start > Programs > POWERLOGIC > DOCS. > Registration.
27. When the Machine Reboot Required message displays, click OK. At the Windows login screen, ***you must log in with a Windows Administrator password.***

SMS is now installed. Remember to install any missing components. See “Installing SQL Service Pack 3 (SQL 2000 only)” on page 52 for instructions on installing SQL Service Pack 3.

If you need to install optional products, such as GFX, see the instruction sheet that you received with the installation CD.

SMS 3.3.2.3 to SMS 4.0 SU1

Follow the steps below to upgrade one of the following scenarios:

SMS 3.3.2.3 or Web3000, Phase 2 to SMS 4.0.1, PE

SMS1500 or PMX1500 to SMS 4.0.1, SE.

SMS121 to SMS 4.0.1, DL

All screen examples are for SMS SE.

1. Use the Database Services function in SMS to back up the SMS history database.
2. Shut down SMS.
3. Insert the *Install Launchpad* disk in the CD-ROM drive of the SMS server computer.

If you have disabled your computer's autorun feature, you will need to launch the installation manually. To do this, click Start > Run, then browse to locate the CD named LP_SMSSEU40_1 (or LP_SMSDLU40_1 or LP_SMSPEU40_1).

Double-click *setup.exe*. At the Run screen, click *OK*.

If you are installing on a computer that has Terminal Services or Terminal Server installed (typically Windows 2000 Server or Windows Server 2003), the Terminal Server Install Failure screen displays.

4. Open the Control Panel and click Add/Remove Programs
5. At the Add/Remove Programs screen, click Add New Programs.
6. At the next screen, check CD or Floppy, then click Next.
7. At the Run Installation Program screen, browse to the CD-ROM drive.
8. At the Browse screen, select *setup.exe*; then click Open.
9. When the Run Installation Program displays again, click Next.

If you have not yet installed required components, they will be listed on the Launchpad Prerequisites screen:

- The components that are listed must be installed before you can continue the installation. Make a note of these components, then click Next to exit the install. Install the prerequisites. See "Prerequisites" on page 3 for installation instructions.

If you see Windows Script Host (WSH) v 5.6 in the list, you need to download and install this component. Download the Windows Script Host 5.6 file from the Microsoft website. Double-click the .exe file to install it. Follow the on-screen instructions.

After all prerequisites are installed, you can restart the installation. After you insert the installation CD, the Welcome screen displays. Click Next.

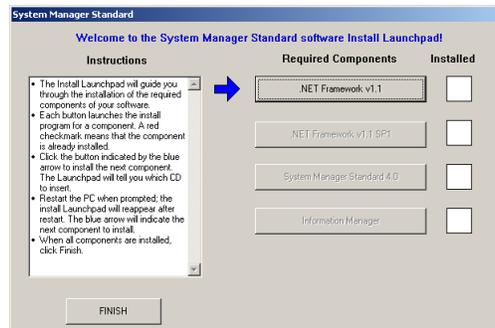
The System Manager Software License Agreement screen displays.

10. Before you continue, read the license agreement to be sure you accept its terms. If you want to print a copy of the text, click Print; the text prints at the default printer.

To continue the installation, click *Yes*. To terminate the installation, click *No*.

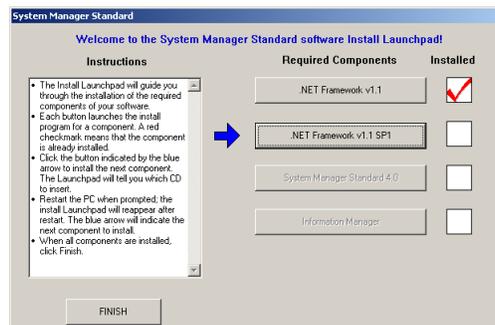
- When the Machine Reboot Required message displays, click OK. At the Windows login screen, **you must log in with a Windows Administrator password.**

After the computer restarts, the Launchpad screen displays:



- If .NET Framework v1.1 has a red check next to it, see “Installing .NET Framework v1.1 SP1” on page 44. Otherwise, click .NET Framework v1.1.
- When prompted to insert the Components CD, remove the *Install Launchpad* CD and insert the *Components* CD. Browse to E:\DotNet Framework v1.1\dotnetfx1_1.exe (where E is the name of your CD drive).
- When prompted whether you want to install the Microsoft .NET Framework 1.1 package, click Yes.
- When the license agreement screen displays, read the license text to ensure that you agree with its terms; then click “I agree” if you wish to continue.
- When installation is complete, click OK.

After a series of verification screens, the Launchpad screen displays:



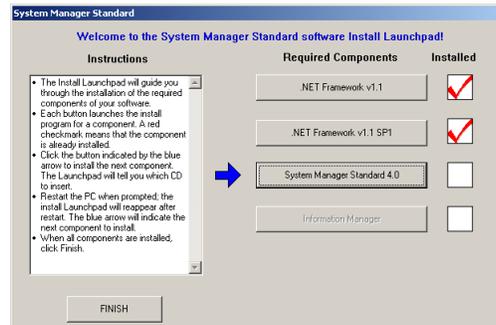
Installing .NET Framework v1.1 SP1

- Click .NET Framework v1.1 SP1.
- Browse to E:\DotNet Framework v1.1\dotnetfx1_1.exe (where E is the name of your CD drive). Double-click dotnetfx1_1.exe.
- When prompted whether you want to install .NET Framework v1.1 SP1, click OK.
The license agreement screen displays.
- If you want to print a copy of the text, click *View EULA for printing*; the text prints at the default printer. Click the “I accept” radio button.

21. When installation is complete, click OK.

If you are prompted to restart, do so now. At the Windows login screen, **you must log in with a Windows Administrator password.**

The Launchpad screen displays:



22. Click the System Manager button.

23. When prompted to insert the System Manager CD, remove the *Components* disk and insert the *System Manager SE* (or *System Manager DL* or *System Manager PE*) disk in the CD-ROM drive.

24. Allow the CD to completely load, then click OK.

25. When the Welcome screen displays, click Next.

The SMS License Agreement dialog displays.

26. Read the license agreement to be sure you accept its terms. If you want to print a copy of the text, click Print; the text prints at the default printer. To continue the installation, click Yes. To terminate the installation, click No.

The Destination Location screen displays.

27. Select the location for installing SMS. It is recommended that you accept the default: C:\POWERLOGIC\SMS. Click Next.

If you have SMS IDs that have blank passwords, a message displays. All of the SMS usernames listed on this screen have blank passwords, which SMS no longer allows. For each username, the password will be changed to match the username. For example, if an ID of JohnDoe has a blank password, the password will be changed to JohnDoe.

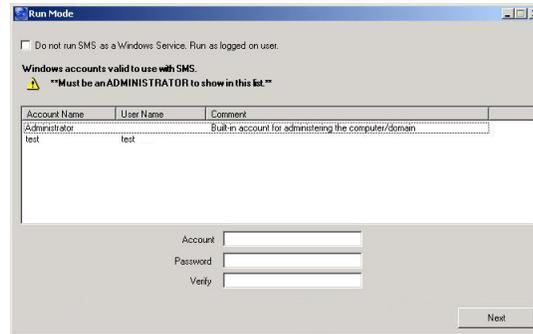
28. Click Next. After installation, you can change the passwords in SMS Setup.

Running SMS as a Windows Service

The About the SMS Account Selection screen displays.

29. This screen describes the procedure for determining whether SMS will run as a Windows service. Read this information; then click Next.

The Run Mode screen displays:



30. On this screen, you choose whether you will run SMS as a Windows service. When you run SMS as a service, the SMS server automatically restarts every time the server computer is restarted. *To ensure that data is always available to remote browsers, we strongly recommend that you run SMS as a service.*

To run SMS as a Windows service: Do not check the box at the top of the screen. Enter a Windows administrator account (or select an account from the list in the box). The account cannot have a blank password: enter the account's password, then retype the password to verify it. This account is used to synchronize the Windows account with SMS components.

For Cross-Language Installations: If you are running SMS on an operating system that does not use the same language (such as French SMS on an English operating system), you need to enter the administrator account that you have specified for this purpose (see "Cross-Language Installations" on page 10).

If you are installing SMS on a computer that has Windows Server 2003, Windows Server 2008, or Windows Vista as its operating system, you must enter a Windows Administrator account that is also a member of the IIS Worker Process Group (IIS_WPG group). For instructions on adding a user to the IIS_WPG, see "Prerequisites" on page 3. You do not need to exit the SMS installation to add the account to the IIS_WPG.

31. After you type the account and password, click Next.

32. When the Start Copying screen displays, click Next.

Several progress messages display, which can take several minutes.

When setup is complete, the System Manager Software Registration Form dialog displays:



33. Have your SMS product serial number available before you begin. The serial number, which registers one SMS client access license (browser access), is printed on the CD case and on a card that is in your software package.

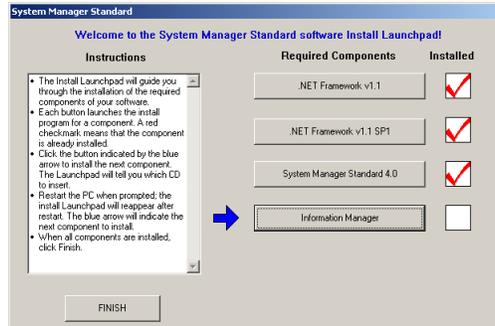
To increase the number of simultaneous browser connections, you can purchase an optional product called WebXTR. See your Schneider Electric representative for assistance.

34. To register your SMS software, click one of the option buttons:

- **Online Registration.** Click this button to launch your Internet browser and display the online registration form. Follow instructions to complete the form. Click *Next* to review the information that you enter. When the information is correct, click *Submit* to send it. Close your browser, close the Registration window.
- **Complete and Print.** Click this button to display a copy of the registration form. Complete the fields online; then print the completed form. Close the registration form window and the Registration window. Fax or mail the completed form to your local Schneider Electric representative.
- **To register at a later time,** click Close. The software registration form will display when you restart your computer. If you close that dialog without registering, locate the form on your computer at Start > Programs > POWERLOGIC > DOCS. > Registration.

35. When the Machine Reboot Required message displays, click OK. At the Windows login screen, ***you must log in with a Windows Administrator password.***

After the computer restarts, the Launchpad screen displays:



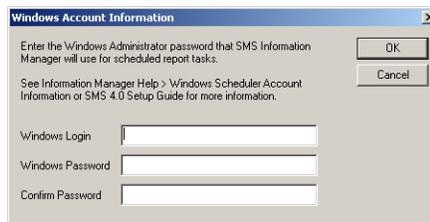
Installing Information Manager

36. Click the Information Manager button.
37. When prompted to insert the Information Manager CD, remove the *System Manager* disk and insert the *Information Manager* disk in the CD-ROM drive.
38. Allow the CD to completely load, then click OK.

The Information Manager License Agreement dialog displays.

39. Before you continue, read the license agreement to be sure you accept its terms. To continue the installation, click *Yes*. To terminate the installation, click *No*.

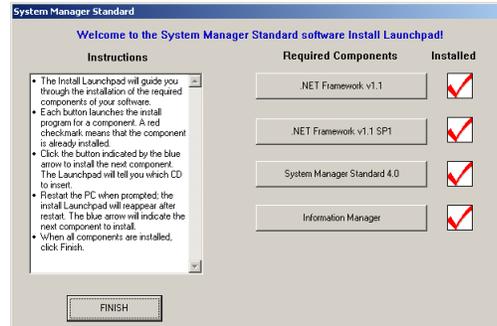
Some installation messages display, followed by the Windows Account Information screen. This account will be used to schedule reports; make a note of the account and password that you enter for future use.



40. Enter a Windows Administrator account and password, and confirm the password; then click OK.

41. When the Machine Reboot Required message displays, click OK. At the Windows login screen, **you must log in with a Windows Administrator password.**

After the computer restarts, the Launchpad screen displays:



42. Click FINISH.

The About the SMS Account Selection screen displays. This screen describes the procedure for determining whether SMS will run as a Windows service.

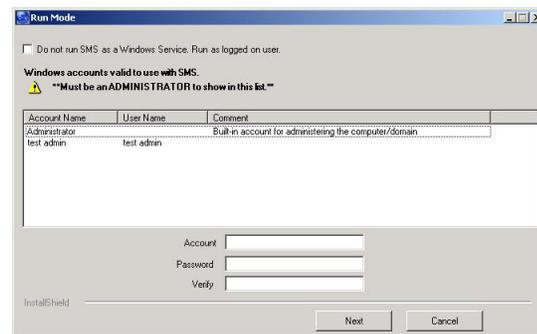
43. Read this information; then click Next.

A message may display, asking if you have added the account to the IIS_WPG group.

44. If the account you will use is not in the IIS_WPG group, click No, and add the account to IIS_WPG; then return to this screen. For instructions on adding a user to the IIS_WPG, see "Prerequisites" on page 3. You do not need to exit the SMS installation to add the account to the IIS_WPG.

If the account is in the IIS_WPG, click Yes.

The Run Mode screen displays:



45. On this screen, you choose whether you will run SMS as a Windows service. To ensure that data is always available to remote browsers, we strongly recommend that you run SMS as a service. When you run SMS as a service, the SMS server automatically restarts every time the server computer is restarted.

To run SMS as a Windows service: Do not check the box at the top of the screen. Enter a Windows administrator or power user account (or select the account from the list in the box). The account cannot have a blank password: enter the account's password, then retype the password to verify it. This account is used to synchronize the Windows account with SMS components.

If you are installing SMS on a computer that has Windows Server 2003, Windows Server 2008, or Windows Vista as its operating system, you must enter a Windows

Administrator account that is also a member of the IIS Worker Process Group (IIS_WPG group). For instructions on adding a user to the IIS_WPG, see “Prerequisites” on page 3. You do not need to exit the SMS installation to add the account to the IIS_WPG.

46. After you type the account and password, click Next.

Several progress messages display, which can take several minutes.

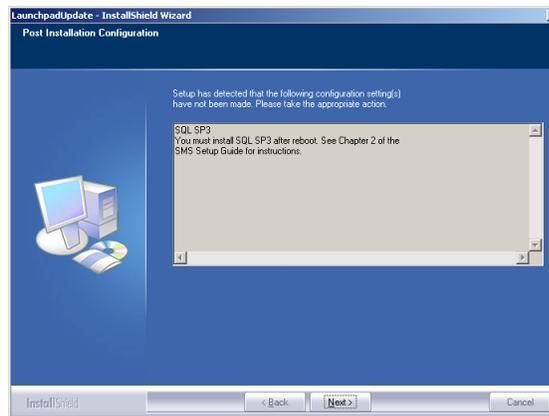
A screen may display with a question about the SQL Administration account:



47. This screen displays if your SQL administrator account has a blank password. SMS can change the password to “DBMaster.” If you want the blank password changed to DBMaster, click Yes. If you do not want DBMaster as the password, click No (to change the password later in System Manager PE, use SQL Enterprise Manager; in System Manager SE and DL, see the Microsoft website).

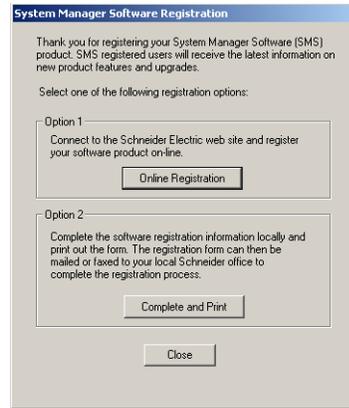
NOTE: When you run an SMS 4.3 upgrade, this will no longer be an issue. With that upgrade, we use Windows Authentication instead of mixed mode authentication; you will not be asked for a SQL password.

If there are missing components (such as Terminal Services or SQL Service Pack 3), the Post Installation Configuration screen displays:



48. Note the missing items. After you finish installation, be sure to install any missing items. Click Next.

The System Manager Software Registration Form dialog displays:



49. Have your SMS product serial number available before you begin. The serial number, which registers one SMS client access license (browser access), is printed on the CD case and on a card that is in your software package.

To increase the number of simultaneous browser connections, you can purchase an optional product called WebXTR. See your Schneider Electric representative for assistance.

50. To register your SMS software, click one of the option buttons:

- **Online Registration.** Click this button to launch your Internet browser and display the online registration form. Follow instructions to complete the form. Click *Next* to review the information that you enter. When the information is correct, click *Submit* to send it. Close your browser, close the Registration window.
- **Complete and Print.** Click this button to display a copy of the registration form. Complete the fields online; then print the completed form. Close the registration form window and the Registration window. Fax or mail the completed form to your local Schneider Electric representative.
- **To register at a later time,** click Close. The software registration form will display when you restart your computer. If you close that dialog without registering, locate the form on your computer at Start > Programs > POWERLOGIC > DOCS. > Registration.

51. When the Machine Reboot Required message displays, click OK. At the Windows login screen, **you must log in with a Windows Administrator password.**

SMS is now installed. Remember to install any missing components. If you need to install SQL Service Pack 3, see "Installing SQL Service Pack 3 (SQL 2000 only)" on page 52.

Optional Device Type Installation (SMS SE and DL, version 4.2 only)

If you have purchased optional add-on software (for example, Sepam or WebXTR), install it now. Follow the steps below.

You may have previously installed optional devices—such as a Sepam device, PM500, or PM9C—before you began the SMS upgrade. If any of these devices were installed, you should re-run the optional install for each device type. This will ensure that all of the device type updates are properly installed.

1. Insert the Optional Device Installs disk in the CD-ROM/DVD drive of the SMS computer.
2. Browse to the CD-ROM/DVD drive and open the Optional folder.
Each add-on product is in its own folder.
3. Open the folder for the first optional device you want to install, then double-click *setup.exe*.
4. Follow the on-screen installation instructions.
5. After the first installation is complete, you are prompted to restart the computer. If you want to install additional add-on products, you can bypass the restart until you have installed all add-on products. After the final installation, restart the computer.
6. After the computer restarts, launch SMS. The add-on products will be available.

Ethernet Gateway

If you are using an Ethernet Gateway and you are moving SMS to a different computer, you need to reinstall the Ethernet Gateway before you install SMS. The installation for the Ethernet Gateway is in your SMS 3.3 installation set.

Installing SQL Service Pack 3 (SQL 2000 only)

Microsoft issued SQL 2000 Service Pack 3 to defend against the “Slammer” virus. You need to install SQL Service Pack 3 on any computer at which a SQL database is installed. There are separate instructions for:

- SQL Standard or SQL Personal
- MSDE

Service Pack 3A Prerequisites

1. If you are running SMS on a Windows XP operating system, you need to upgrade the operating system to Windows XP Service Pack 1 before running the SQL/MSDE Service Pack 3. You can download the Windows XP Service Pack 1 from Microsoft’s website at:
<http://www.microsoft.com/WindowsXP/SP1>
2. Make sure that you have enough free space to run this install. You need at least 400 MB of free space for this service pack installation.

If you have already installed SQL Service Pack 3 on the server computer, you can skip these instructions, and go to “Optional Device Type Installation (SMS SE and DL, version 4.2 only)” on page 52. If you have not yet installed SQL Service Pack 3 on your SMS server computer, choose the correct instructions for your operating system.

SQL Service Pack 3 for MSDE

Use this install for all System Manager DL and System Manager SE.

1. Insert the *Components* disk in the SMS Server computer's CD-ROM drive.
2. From the *MSSQL2000_SP3* folder on the *Components* disk, copy the folder called *sql2ksp3_msde*. Place *sql2ksp3_msde* on the computer's C drive.
3. Copy the file called *Install_MSDE_SP3.exe* from the CD (*MSSQL2000_SP3* folder). Place *Install_MSDE_SP3* in *sql2ksp3_msde* on the computer's hard drive.
4. From the computer's hard drive, launch *Install_MSDE_SP3.exe*.
5. When prompted, choose the SQL instance that is installed on the computer. Enter the user and password for that instance. Follow the remaining instructions to complete the Service Pack 3 installation

If there are multiple SQL instances, repeat this step for each of them.

6. After you finish the SQL Service Pack 3 installation, go back to Database Services to back up your entire database (Database Services is in the SMS Setup Utility: Setup > Administrative > Database Services).

You are now ready to begin using SMS.

Additional SMS Client Licenses

When you purchase System Manager DL or System Manager SE, you receive one SMS client access license. This license permits one browser connection to SMS. You can purchase an additional five licenses for a total of six simultaneous browser connections.

When you purchase System Manager PE, you receive 10 client access licenses. You can purchase additional licenses (in increments of five) to give you a total of 30 simultaneous browser connections.

To order the extra licenses, go to www.powerlogic.com; or contact your Schneider Electric representative.

When you receive the additional licenses, you must register them. To begin registration, click Start > Programs > POWERLOGIC > DOCS. Follow the same registration process that you followed when you installed SMS.

Using SMS

This chapter provides information on accessing SMS, using a browser and launching SMS Setup, and using reports.

Accessing SMS

This section describes how to access the SMS server from the server computer, and how to deploy SMS (provide SMS access) to remote users.

Using a Power User Account when Running SMS

We recommend that you are logged on the server with an Administrator-level account when running SMS, but you may use a Power User-level account instead.

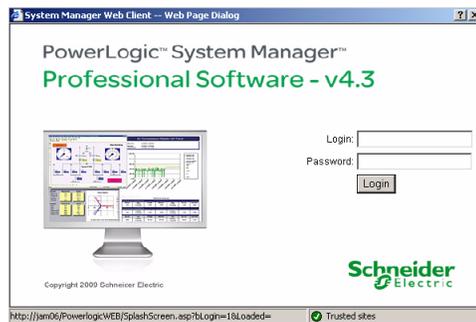
Accessing the Server Computer

To access the SMS server computer, follow these steps:

1. At any computer that will access SMS, ensure that you do not have your computer set for “large fonts.” This setting is found in the Control Panel.
2. Be sure that IIS is running. If it is not running, you cannot access the SMS browser.
3. Launch the SMS browser: From the server computer, click Start > Programs > POWERLOGIC > System Manager Software.

If your user account does not provide high enough security, you see a message telling you that Internet Explorer’s Enhanced Security Configuration is enabled. This prevents you from viewing the SMS browser page. To enable viewing of the browser, add it to the Intranet or Trusted Sites for your user account. Do this in Internet Explorer (click Tools < Internet Options. Then go the Security tab.)

The POWERLOGIC Web Client login screen displays:



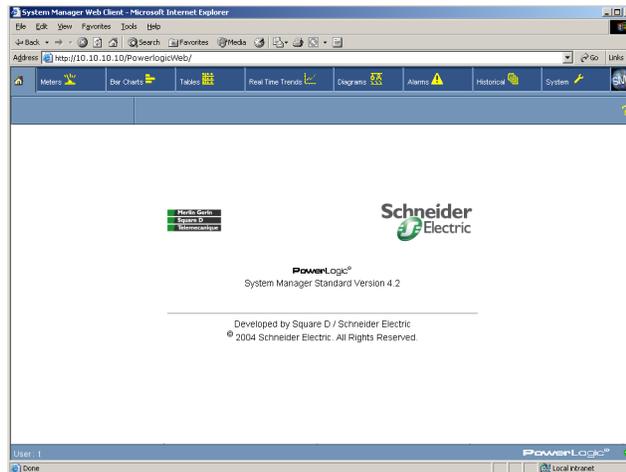
SMS 4.3



SMS 4.2

4. Enter a valid login ID and password for the SMS software installed on the host computer. This is the user account that is created in SMS Setup. The user account that you use must have both ID and password (blanks not acceptable). You receive this ID and password from your POWERLOGIC system administrator.

The SMS home page displays (version 4.2 shown below):



Delivering SMS to System Users

Establishing User Names and Passwords

Before users can access and use SMS, you must establish user names and passwords in the SMS Setup Utility. SMS users will enter their name and ID when accessing SMS from SMS Setup or the browser. All user names and passwords give access to every feature in the browser. However, users can be given different levels of access to SMS Setup. See the SMS Setup online help file for a table that illustrates user access levels.

To add SMS user names and passwords, open SMS Setup from the SMS server, then access the user accounts feature (Setup > Administrative > User Accounts). For instructions, see SMS Setup online help file.

Notifying Users

After you set up user names and passwords, give each user the following information:

- the user ID and password they are to use when accessing SMS
- the URL link to the SMS server computer

Opening an SMS Browser Session as a Remote User

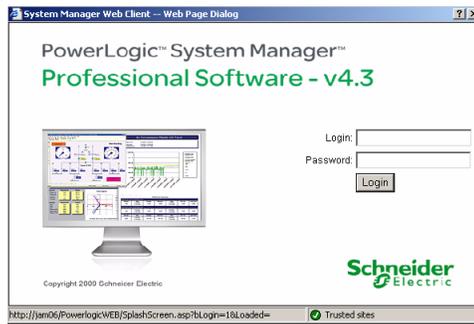
To open an SMS session from a remote computer, follow these steps.

1. The SMS server must be accessible. If it is not, follow instructions in “Accessing the Server Computer” on page 55 to launch the browser.
2. At the remote computer, open Internet Explorer.
3. Enter the computer name or IP address for the SMS server computer, followed by “/powerlogicweb.” Your system administrator can give you the name or address of the server computer.

For example, if the computer name is “webserver,” the name to be entered at the remote computer would be:

`http://webserver/powerlogicweb`

The POWERLOGIC Web Client login screen displays:



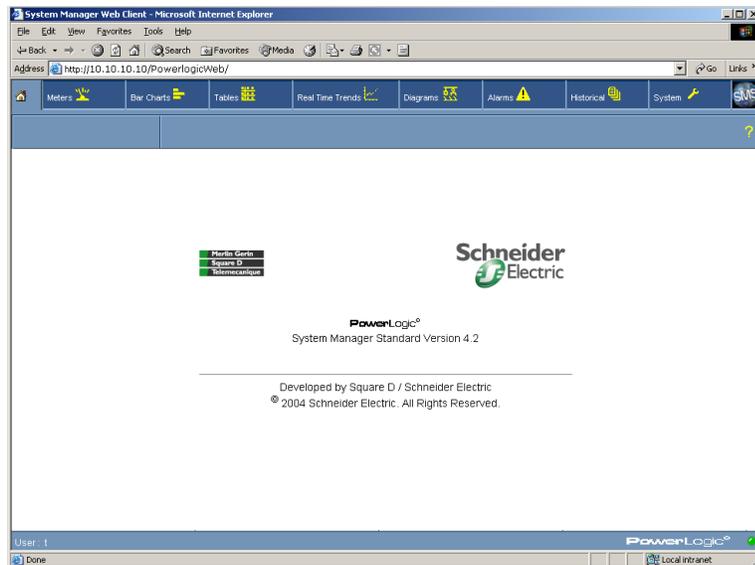
SMS 4.3



SMS 4.2

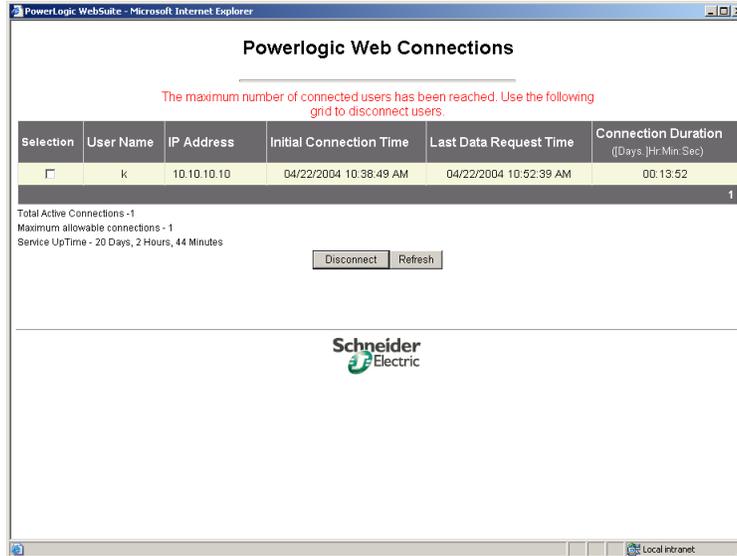
4. Enter a valid login ID and password for the SMS software installed on the host computer. This is the user account that is created in SMS Setup. The user account that you use must have both ID and password (blanks not acceptable). You receive this ID and password from your POWERLOGIC system administrator.

The SMS home page displays (version 4.2 shown below):



When Maximum Number of Connections is Met

When the maximum number of allowable browser sessions has been reached, you see the following screen when you try to log into the SMS browser:



All of the users who have a browser session open are listed. If you have entered an administrator-level SMS account (level 1), you can disconnect another user.

To disconnect the user, check the Selection box, then click Disconnect. Your browser session will begin immediately.

Accessing the SMS Advanced Reports Add-on Application (SMS PE only)

To launch Advanced Reports, follow these steps:

- From the server computer, click Start > Programs > PowerLogic > Advanced Report.
Or, from the SMS browser, select the History tab; then click Advanced Reports
- When you are prompted for a password, enter your SMS ID and password.

When the Advanced Reports window opens, refer to the Advanced Reports online help file for instructions on using Advanced Reports.

If Advanced Reports does not Open Correctly

If Advanced Reports does not open correctly, consider these possibilities:

- Windows Server 2003 only: If the Advanced Reports browser window does not display, add the website to your trusted sites. The website address to add is:
<http://pcaddress/Powerlogic/AdvancedReports/Default.aspx>
where "pcaddress" is the name of the server computer.
For help in adding the browser to your trusted sites, contact your system administrator.
- If you launch Advanced Reports from the Start menu, it should always be with a new instance of Internet Explorer. If, however, the Advanced Reports browser window opens in the existing browser window (closing the SMS browser window), do the following:
With Internet Explorer open, click Tools > Internet Options. On the Advanced tab, uncheck "Reuse windows for launching shortcuts." Click OK.

Restarting the Crystal Management Server

If the browser does not open and the following message displays, you will need to restart the Crystal Management Server.

“Unable to retrieve cluster members. CMS host 'yourpc' can be contacted, but there is no CMS running at port 6400.”

To restart the browser, click Start > Programs > Crystal Enterprise 10 > Crystal Management Server.

Note the icons to the left of each server name. For any server with a red icon (server is stopped), right-click the server name and choose Start. Close the Crystal Configuration Manager. You should now be able to launch Advanced Reports.

Accessing the SMS Setup Client

To access SMS Setup, follow these steps:

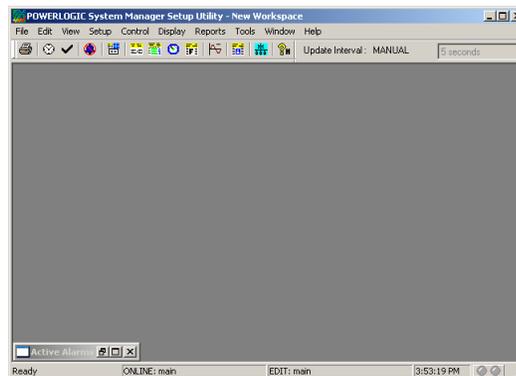
1. From the server computer, click Start > Programs > POWERLOGIC > SMS Setup.

The SMS Setup Login screen displays:



2. Enter the SMS User ID and password that have been assigned to you. Click OK.

SMS splash screen displays, followed by the SMS Setup Utility main window:



3. For help using SMS Setup, click Help > Setup Utility Help.

If there are already devices in your SMS Setup Utility, and any of them have lost communication with SMS, the System Device Status screen displays. For help in bringing devices back into service, click Help on this screen.

Customizing the SMS Interface

The SMS browser is designed with a default appearance. You may wish to make some changes to customize this appearance. For example, you might want to use your company logo as part of the SMS browser main window. However, you cannot make any changes to the SMS functionality. If you have questions about customizing SMS, contact your local Schneider Electric representative.

Customizing the About Box Icon and Banner

The SMS icon at the upper right of the browser screen and the blank banner space indicated in Figure 1–1 are default graphics. You can replace either or both of these graphics with your own graphics.

To replace one of these graphics, follow these steps:

1. From the server computer, locate the two graphic files:
 - defaultLogo.JPG (the About box)
 - DefaultBanner.jpg (the banner)These files are in the POWERLOGIC\SMS\Web\Logos folder.
2. You can replace one or both of these graphics with your own graphics. Be sure to use replacement graphics that are the same size and type (for example, .jpg) as the defaults.
3. After you replace the graphic(s), delete the temporary Internet Explorer files that reference the old graphics. Follow these steps:
 - On the SMS server computer and on each remote computer that will open SMS browser sessions, launch Internet Explorer. Click Tools > Internet Options. The General tab displays.
 - In the Temporary Internet Files box, click Delete Files. When the Delete Files screen displays, check the “Delete all offline content box” and click OK.
 - Click OK to close the Internet Options screen.

The new graphic(s) will display in the browser screen. In Figure 1–1 below, both graphics are replaced. The banner will only display on the SMS browser home page. When you click on a tab to display information, the banner disappears.

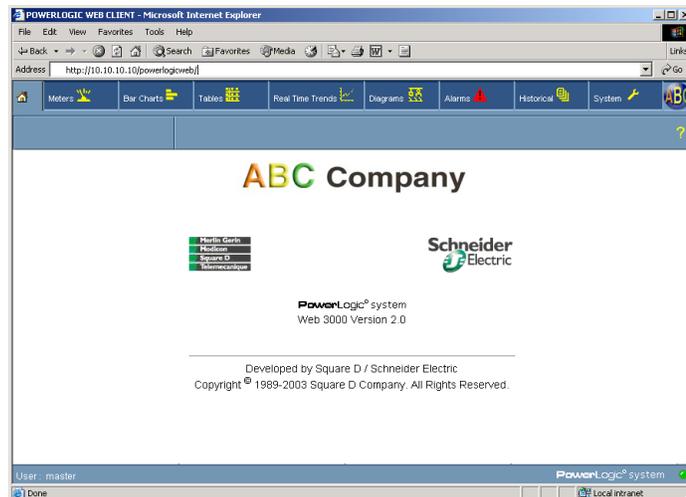


Figure 1–1: Home page with customized About box and banner

For information about using features in the SMS browser, see the SMS online user’s guide: Click System > Documentation and Links; from the tree control, select SMS User’s Guide.

For information about using the SMS Setup Utility, see the SMS Setup Utility help file: From within SMS Setup, click Help > Setup Utility Help.

Storing Document Files and Web Links

You can store document files and links to web sites on the server computer in the POWERLOGIC\SMS\Web\Maintenance folder. Once they are stored, you can view them using the Documents and Links option on the System tab.

Files from Earlier Versions of SMS

When upgrading from an earlier version of SMS, only documents with these extensions will display in the Documentation list:

- .htm
- .html
- .asp
- .pdf

Files with other extensions are also moved to the Maintenance folder, but they do not display in the Documentation list. If you want to view these other files in the SMS browser, you must do one of the following:

- convert each file to one of the extensions listed above
- create a file, such as an .html file, to link to each document

Viewing and Adding Links

When you view a PDF document, the Adobe Acrobat Reader plug-in is launched within the browser window. If you want to view a PDF document from a computer that does not have Acrobat Reader installed, you can download it from the Adobe website, www.adobe.com.

Several links are already loaded on the server computer: Internet links to Square D and Schneider Electric web pages, and an HTML version of this manual. Additional documents and HTML links that you might want to add are: power equipment drawings, additional user guides, or links to your own web site.

To add a document or web link, place it in the POWERLOGIC\SMS\Web\Maintenance folder on the SMS server computer. As soon as the document or web link is added to the Maintenance folder, it is available for use; click the home icon to refresh the view and display the link.

Information Manager Considerations

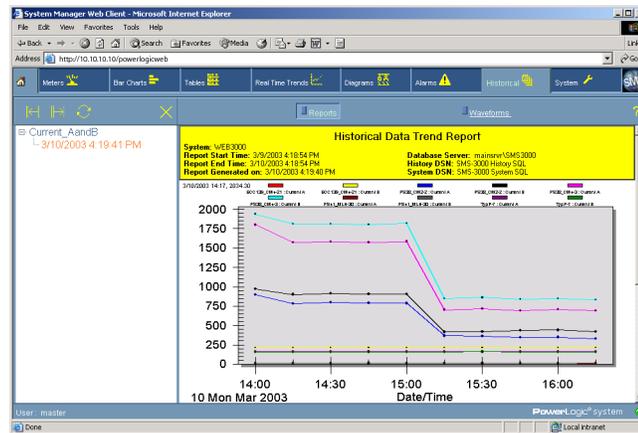
Information Manager is the reports feature in System Manager DL and System Manager Standard. (SMS PE uses the Advanced Reports feature to create and view reports.)

Information Manager allows you to create, schedule, print, and view reports containing historical data from PowerLogic System devices. If you need help creating and using reports, see the online help file that is in Information Manager. To access the help file, open Information Manager, then click Help > Contents.

You can add, edit, and schedule Information Manager only from the server computer. However, you can use the browser to view reports from any remote computer.

Once you create a report, its name displays in the left pane of the Historical tab of the SMS main window.

You can view the report from any remote computer that accesses SMS, without launching SMS Setup on the server computer. To view a report, click its name; it displays in the right pane of the SMS window. The following is an example of a historical data trend report.



Printing Information Manager Reports (SMS SE and SMS DL only)

You can automatically print reports from Information Manager on the SMS server computer. (The Information Manager help file describes how to schedule each type of report.) Although remote users cannot schedule reports, they can print reports manually:

1. Display the report (to open it, click the report name that displays in the left pane of the SMS browser window).
2. With the report displayed, click the right pane of the SMS window. This selects that pane for printing.
3. From the browser toolbar, select File > Print.
4. When the Print screen displays, select the printer and click Print.

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SMS Setup Guide

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63220-060-228H1 06/2009 Replaces 63220-060-228G1, dated 4/2008
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