System Manager™ Software Family Installation Notes

Version 4.0

02/2005

Retain for future use.

Use this instruction sheet when you install System Manager 4.0, whether you are installing SMS new or as an upgrade.

Before installing

Ensure that the prerequisites described in the Prerequisites section of the *SMS 4.0 Setup Guide* have been met. If all prerequisites are not met, the install program will notify you and will exit the installation.

Ensure that you have read the entire section "Administrative Concerns" in the Setup Guide. This section includes such topics as "Security Setup," "Communications Protocol Setup," and "SQL Considerations." This section gives you system setup information that will help ensure proper system operation.

Locating the Required Prerequisites

Internet Explorer and operating system service packs:

www.microsoft.com

NOTE: Microsoft no longer makes Internet Explorer 5.5, Service Pack 2 available. If you do not have Internet Explorer 5.5, Service Pack 2, you can download Internet Explorer version 6 from Microsoft.

IIS, ASP, and ASP.NET:

The *SMS 4.0 Setup Guide* has instructions for installing and enabling these Microsoft products.

Although each operating system has a different procedure for installing/enabling these products, you will install this software from your original operating system CDs. If you do not have the operating system CDs, please contact your IT department for assistance.

Note About Microsoft Access

NOTE: Microsoft Access is an application that is included in some versions of Microsoft Office. Access is used to create, modify, and view databases. In SMS, a version of Access 2000 is used to view PowerLogic System Reports.

If Microsoft Access 97 (or any version prior to Access 2000) is installed on the server computer, the SMS 4.0 install will detect it and stop the install.

We highly recommend that you upgrade to Access 2000 before you install SMS. If this is not possible, you can install the Access 2000 Runtime version on the same computer as Access 97. Access Runtime is a version of the Access application that allows you to view databases, but not create or modify them. When Access 2000 Runtime (a free download) is installed, you can install and use SMS 4.0.

Square D / Schneider Electric
295 Tech Park Dr, Suite 100
Lavergne, TN 37086 USA
1-888-SquareD (1-888-778-2733)
www.SquareD.com
www.PowerLogic.com

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.

© 2005 Schneider Electric All Rights Reserved

Schneider Electric

If, when you begin the SMS 4.0 install, you see a message about Microsoft Access 97, follow the instructions in the message to go to the downloads on the PowerLogic website (www.powerlogic.com/downloadlist.cfm). From there, you will download Access 2000 Runtime and install it on the SMS server computer. After that, you can install SMS 4.0.

Special steps need to be followed when installing two versions of Microsoft Access on one computer. By following these steps, the Microsoft Access database files can be opened, used, and saved properly. A .pdf file called "Dual Access Install" is available for download from the PowerLogic downloads site:

www.powerlogic.com/downloadlist.cfm

Read this .pdf file for assistance on this subject. If you have questions or need assistance, contact your PowerLogic technical support representative.

Install SMS Using a Dedicated Windows Administrator Account

The person who installs SMS 4.0 must be logged on to the server computer as a Windows Administrator on the local computer. Create this Administrator account before you begin the SMS install.

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

Changing the Password

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

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

Using a PowerUser 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 PowerUser-level account instead. If you are logged on with a PowerUser account when you launch SMS, consider the following:

SMS 4.0 includes a new feature called a monitoring application that runs as a service. The application performs several important functions including monitoring the SMS database and the PC hard drive and generating SMS alarms to warn you when they are becoming full. (See the SMS Setup Utility Help File for a complete description of the monitoring application). If you log on to the computer using a PowerUser account, the monitoring application will not start. To remedy this situation:

1. Click Start > Settings > Control Panels > Administrative Tools > Services.
2. In the list of Services, locate PowerLogicSystemMonitorService.
3. Right click on the service and choose Properties.
4. On the General tab of the Properties dialog, set Startup Type to Automatic.

Installation Instructions: SMS 4.0 as a New Product

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

1. **Follow all of the instruction**s in these Installation Notes.
2. **Close all Windows applications** on the SMS 4.0 server computer.
3. **Set up Prerequisites**. See chapter 1 of the SMS 4.0 Setup Guide for a complete discussion of the prerequisites.
4. **Follow the installation steps in the Setup Guide**. Chapter 2 of the SMS 4.0 Setup Guide provides a detailed installation procedure.
5. **Register your software**. Complete the registration form. Submit it online, or print and fax it to your local sales representative. Identify the entire product (e.g., SMS DL) and all serial numbers that you have installed. The serial number is on the license agreement card in your shipment (document # 63220-046-02).
6. **Install optional software**. If you have purchased optional software, such as GFX or WebXTR, install this software now.
7. **Begin using SMS 4.0**.

   If you need help using the SMS 4.0 interface, see the online *SMS 4.0 User's Guide*. This manual is presented as HTML pages. To view it from the browser interface, click the System tab, then click Documentation and Links. From the tree control, select SMS 4.0 User's Guide.

   If you need help using the SMS Setup Utility, see the SMS Setup Utility help file. From within the Setup Utility, click Help > Setup Utility Help.

Installation Instructions: SMS 4.0 as an Upgrade

NOTE: The time required to complete the System Manager 4.0 portion of the upgrade (initiated by the "System Manager Standard 4.0" or "System Manager DL 4.0" button on the install launchpad) can vary greatly. On simple systems, this portion of the upgrade can take several minutes. On more complicated systems, especially those with many complex GFX diagrams, this portion of the upgrade can take over an hour.

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

1. **Follow all of the instruction**s in these Installation Notes.
2. **Close all Windows applications** on the SMS 4.0 server computer.
3. **Set up Prerequisites**. See chapter 1 of the SMS 4.0 Setup Guide for a complete discussion of the prerequisites.
4. **Follow the installation steps in the Setup Guide**. Chapter 2 of the SMS 4.0 Setup Guide provides a detailed installation procedure.
5. **Register your software**. Complete the registration form. Submit it online, or print and fax it to your local sales representative. Identify the entire product (e.g., SMS DL) and all serial numbers that you have installed. The serial number is on the license agreement card in your shipment (document # 63220-046-02).
6. **Install optional software**. If you have purchased optional software, such as GFX or WebXTR
7. , install this software now.
8. **Begin using SMS 4.0**.

   If you need help using the SMS 4.0 interface, see the online *SMS 4.0 User's Guide.* This manual is presented as HTML pages. To view it from

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

If you need help using the SMS Setup Utility, see the SMS Setup Utility help file. From within the Setup Utility, click Help > Setup Utility Help.

Installing Optional Device Types

These paragraphs include installation instructions for these optional device types:

- DC150
- PM300
- PM500
- Sepam 2000
- Sepam Series 80
- PM9C
- Vigilohm System

If you have set the PowerLogic Network Server (PLNS) to run as a Windows service, follow the instructions under "PLNS Running as a Service." Because it is strongly recommended that you run the PLNS as a Windows service, you will probably follow this procedure. (For additional information on running the PLNS as a Windows service, see the installation instructions in the *SMS 4.0 User's Guide*, document number 63220-060-228B1.)

If you are not running the PLNS as a Windows service, follow the instructions under "PLNS Not Running as a Service."

PLNS Running as a Service

1. Insert the CD entitled *System Manager V4.0 Optional Device Driver* in the SMS server CD-ROM drive.
2. Stop the PLNS:
   a. Click Start > Settings > Control Panel.
   b. Double-click Administrative Tools, then double-click Services.
   c. In the right-hand pane, right-click PowerLogic Network Server, and select Stop.
3. Browse to the CD drive, then open the folder of the first device type you want to install.
4. Double-click the *Setup.exe* file.
5. Follow the on-screen instructions to install that device type.
6. When the installation is complete, restart the computer.
7. Repeat steps 2 through 6 for each additional device type.

PLNS Not Running as a Service

If the PLNS is not running as a Windows service, follow these instructions to install the device types:

1. Shut down SMS before you begin.
2. Insert the CD entitled *System Manager V4.0 Optional Device Driver* in the SMS server CD-ROM drive.
3. Browse to the CD drive, then open the folder of the first device type you want to install.
4. Double-click the *Setup.exe* file.
5. Follow the on-screen instructions to install that device type.
6. When the installation is complete, restart the computer.
7. Repeat steps 3 through 6 for each additional device type.
8. Restart SMS.