

System Manager™ Installation Notes

Version 4.3: New and Upgrade Installations of SMS PE

Use this instruction sheet for a new or upgrade installation of SMS version 4.3 for SMS PE.

What's New?

The SMS 4.3 release provides the following features:

- **New PM 210 device type:** The Power Meter 210 device type is fully functional as a standard PowerLogic-compatible device type. Using SMS, you can now reset accumulated value device topics.
- **WAGES additions to Advanced Reports:** The Advanced Reports have now added the ability to report on WAGES data. During setup of the report, you can now choose the type of data that you want to include.
- **Advanced Reports expanded device/topic option:** Most of the Advanced Reports now allow you to choose a much larger combination of devices and topics.
- **Use of Windows Authentication to enhance security:** Offering a higher level of security than mixed authentication, Windows Authentication will help prevent unintended access to your SQL server.
- **Windows Server 2008 support:** SMS PE will install and operate on this operating system.

Before installing

Read the *Software Policy* (document number 63220-060-210) that was included in your software shipment. This document contains warranty information and the software license agreement. Make sure you agree with the conditions of the license agreement before you open the seal on the software package.

Ensure that the prerequisites for SMS installation have been met. If all prerequisites are not met, the install program will notify you and will exit the installation. You can find prerequisites in one of two places:

- At the beginning of the installation, when you are viewing the splash screen, there is an option to "Review System Requirements." Click that link to view a page that lists the hardware and software requirements that you must meet before you begin the installation.
- See the *SMS Setup Guide* (document number 63220-060-228), page 5, for a table that lists hardware and software requirements.

NOTE: Please refer to the Setup Guide table for the requirement pertaining to Internet Information Services (IIS). The "Review System Requirements" page in the installation is not correct.

Also, read the entire section called "Administrative Concerns" in the Setup Guide. This section includes information on such topics as setting up SQL, Terminal Server, and communications protocols. Follow the guidelines in this section to be sure that your system operates properly.

Locating the Required Prerequisites

.NET Framework 3.5 SP1:

The installation file is located on the installation DVD:

For new installations, see ProfessionalEditionNew > Tools.

For upgrade installations, see SMSPEUpgrade > Tools.

Internet Explorer and operating system service packs:

Microsoft Internet Explorer, version 6, service update 1 or higher
www.microsoft.com

Microsoft Message Queuing component (MSMQ):

This component, used for internal communication within SMS, is located on the Windows install CD. Follow steps in Chapter 1 of the *SMS Setup Guide* to install it.

IIS, ASP, and ASP.NET:

The *SMS 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.

Windows 2008 Issues

Disabling Automatic Updates:

When any of the Windows 2008 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 2008, 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 Windows 2008 operating system sleep mode. To do this, follow these steps:

1. Before you install SMS, open the control panel on the SMS computer.
2. Click Power Options (it may be easier to locate Power Options if you switch to Classic view).
3. For the power 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 power plan, you must also change the display and sleep options to Never for the new plan.

Install SMS Using a Dedicated Windows Administrator Account

The person who installs SMS 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 or Windows Server 2008 as its operating system, you must use an Administrator account that also belongs to the IIS_WPG group. For Windows Server 2008, the IIS_WPG group is only available after the SMS installation has begun.

Changing the Windows Password

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

1. From the SMS Setup Utility toolbar, click Tools > Configuration Utility.
2. On the Diagnostics tab, click Setup to launch the PowerLogic Service Setup Utility.
3. On the Run Mode screen, select the Account Name; then enter and verify the new password.
4. 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 includes a 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.

NOTE: When running SMS on a Windows XP operating system, the Administrative Tools option may not display. If not, you need to set the computer on Classic view (right-click the desktop and choose Properties: click Start > Settings > Control Panel). In the left-hand pane, change Category View to Classic View.

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Getting technical support:

Contact your local Schneider Electric sales representative for assistance or go to the

www.powerlogic.com website.

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