

POWERLOGIC® SMS 4.0

System Manager Software Setup Guide

Instruction Bulletin
Retain for future use.



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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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CHAPTER 1 — INTRODUCTION

WHAT IS SMS 4.0?

PowerLogic® System Manager Software 4.0 (SMS 4.0) provides access to real-time and historical system data using a standard web browser format. With SMS 4.0, you can:

- view real-time data in meters, bar charts, and tables
- view real-time trends
- view documents (in PDF and HTML format) and web links to certain Schneider sites, as well as to your own favorite sites
- view certain “web-enabled” devices from the SMS Setup Utility (when adding the device to the Setup Utility, you can set it to be web enabled)
- set user preferences for the SMS 4.0 browser display
- store and view historical waveforms and reports
- configure and retrieve alarm information
- create and view data diagrams (if you also have installed the GFX interactive graphics software)

There are three SMS 4.0 products: System Manager DL, System Manager Standard, and System Manager Professional. Throughout these instructions, all three products will be called “SMS 4.0” or “SMS.” Not all of the SMS 4.0 features are available in all three products. When a feature is limited to one or two of the SMS 4.0 products, the instructions will explain the limitation.

SMS 4.0 Browser Access

You can view SMS information from any computer that has Microsoft Internet Explorer, version 5.5 (service pack 2) or greater. As long as the browser can connect to the SMS server computer, users have full access to the browser features.

For a description of all of the browser features, see the SMS 4.0 online user’s guide, accessed from within the browser. See Table 1–1 on page 4 for hardware requirements. See “SMS Licensing Requirements” on page 7 for an explanation of licensing requirements.

SMS Setup Utility

In addition to viewing information through a browser connection, you can access information through the SMS Setup Utility, which runs on the server computer. Use the Setup Utility to add and configure devices and their network addresses. With the Setup Utility, you also set up historical logging and system alarms. You can view real-time data in the Setup Utility also (from the server computer).

For information about launching the Setup Utility, see the SMS 4.0 User’s Guide (from the SMS browser, click the System tab; then click “SMS 4.0 User’s Guide” from the list in the left pane of the window. For help using the Setup Utility, refer to the Setup Utility online help file.

Part of the Setup Utility is the PowerLogic Network server (PLNS), which resides on the SMS 4.0 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 4.0 installation.

In System Manager DL or System Manager Standard, you must access the Setup Utility from the server computer; thus, only one connection to the Setup Utility can be made at a time. If you have System Manager Professional, you can connect to the Setup Utility from the server and from remote browsers. For remote access, 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 4.0 server simultaneously. Contact Microsoft to purchase the necessary licenses.

NOTE: The browser must be Internet Explorer, version 5.5, service pack 2, or greater. You cannot use Netscape to view SMS 4.0 screens. If you do not have service pack 2 installed, you can download a copy from Microsoft.com. (If you prefer, you can download and install Internet Explorer 6.0.)

CONTENTS OF THIS PACKAGE

In this package you will find:

- **SMS 4.0 installation CDs** (includes five CDs)
- **SMS 4.0 Installation Notes**, containing last-minute instructions for installing and using SMS 4.0
- **Product serial number** to register your System Manager products; the serial number is found on a card inside the software box, as well as on the box itself.

User Documentation and Help Files

SMS 4.0 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?
Installation: SMS 4.0 (including GFX and Information Manager)	SMS 4.0 Launchpad installation	SMS 4.0 Setup Guide; see "New Installation, System Manager DL and System Manager Standard" on page 9.
Launching (accessing) SMS Setup Utility	Start Menu	SMS 4.0 User's Guide (HTML help file, accessed from the browser); or see "Accessing the SMS Setup Utility" on page 25.
Viewing Information via your browser	Start Menu	SMS 4.0 User's Guide (HTML help file, accessed from the browser); or see "Accessing the Server Computer" on page 21.
Setting up system devices	SMS Setup Utility	Setup Utility online help file
Setting up reports	System Manager DL and Standard: Information Manager	Information Manager online help file
Setting up historical logging and device alarms	SMS Setup Utility	Setup Utility online help file

PREREQUISITES

Before you install SMS 4.0, ensure that you have all of the prerequisites listed below:

1. The person who is installing SMS 4.0 must be logged on to the server computer as a Windows Administrator on the local computer. This person cannot be logged on to the domain during installation. Be sure that you create this Administrator account before you begin the SMS Launchpad install.

You will be asked to restart the computer during the installation process. Each time you restart, you must sign back on to the computer with an Administrator's Windows login ID and password.

If you are installing 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_WPG group.

2. There must be at least 150 MB of free space on the computer hard drive (typically, the C: drive).
3. For System Manager DL and Standard: ensure that one of the following operating systems is installed on the SMS 4.0 server computer:
 - Windows XP Professional (Service Pack 1)
 - Windows 2000 Professional (Service Pack 3)
 - Windows 2000 Server (Service Pack 3)
 - Windows Server 2003 (Service Pack 3)

For System Manager Professional: ensure that one of the following operating systems is installed on the SMS 4.0 server computer:

- Windows 2000 Server (Service Pack 3)
- Windows Server 2003 (Service Pack 3)

Service packs can be obtained from Microsoft (www.microsoft.com).

4. Ensure that Internet Explorer version 5.5, service pack 2, is installed on the server computer. You may install more recent versions or service packs, but you cannot use Netscape.

Table 1–1 lists the minimum hardware/software requirements to run SMS 4.0 on the server computer. “SMS Licensing Requirements” on page 7 lists the minimum licensing requirements to provide SMS 4.0 browser connections.

Table 1–1: SMS 4.0 Minimum Hardware/Software Requirements

Requirement	SMS 4.0 Product			
	System Manager DL	System Manager Standard	System Manager Professional Server	Remote Browser Computer
Processor Speed	733 GHz ¹		1 GHz	N/A
RAM	256 MB ¹		512 MB	64 MB
Disk Space	3 GB free space (includes space for historical logging) ¹		1 GB free space PLUS space for logging (see “Calculating Space Requirements for Logging” below.)	N/A
PC Monitor Resolution	800x600 minimum			
Operating System	Windows 2000 Professional (Service Pack 3) or Advanced Server (Service Pack 3) Windows XP Professional (Service Pack 1) Windows 2000 Server (Service Pack 3) Windows 2000 Server Advanced Service Edition or Windows Server 2003 (Service Pack 3)		Windows 2000 Server (Service Pack 4) Windows Advanced Server (Service Pack 3) Windows Server 2003 (Service Pack 3)	Any operating system that supports Internet Explorer version 5.5, service pack 2, or higher
Browser	Internet Explorer 5.5, service pack 2 or greater. Service Pack 2 must be obtained from Microsoft (www.microsoft.com). Netscape and earlier versions of Internet Explorer cannot be used.			
Internet Information Services (IIS)	Version 5.0 (or greater) required; enables SMS 4.0 to serve web pages to browser clients			N/A
Terminal Services	N/A		Required for accessing the SMS Setup Utility from a remote browser	N/A
.NET Framework, SP 2	Install from the Launchpad CD.			N/A
SOAP Toolkit, version 3	Install from the Launchpad CD.			N/A
GFX	Required to use the Diagrams feature in SMS, and to view GFX drawings.			N/A
Maximum Number of Simultaneous Browser Connections	1 (can be increased to 6 with optional WebXTR product)		10 (upgradable 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 If the user may wish to add the “Advanced Reports Add-On for System Manager Standard, use the processor speed, RAM, and disk space requirements for System Manager Professional.

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 Utility 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

As you prepare to install SMS 4.0, please keep in mind the following points.

To access SMS 4.0, 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. Instructions for adding user accounts are found in the SMS Setup Utility online help file.

Each SMS 4.0 user who accesses the SMS Setup Utility through Terminal Services (System Manager Professional 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 the Setup Utility online help file) shows the level required for each SMS feature.

Although the Setup Utility requires specific security levels in order to access its features, the SMS 4.0 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.

Communications Protocol Setup

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 the Setup Utility, click Tools > Configuration Utility). If you need help when making changes in this utility, see the Setup Utility online help file.

NOTE: The default protocol is Named Pipes. Before you can change the protocol to TCP/IP, you must completely install SMS, including the final restart.

SQL Considerations

Please verify the SQL configuration on the SMS 4.0 server computer before you continue with the SMS 4.0 installation. There are two possibilities:

- The SMS 4.0 Launchpad installs will add a SQL instance named "SMS3000," with mixed-mode authentication. If you change or delete this instance, you will not be able to log on to SMS.
- If you do not want to install the SMS3000 instance via the Launchpad, you can use your own copy of SQL Server software to create your own instance. But the instance must be named SMS3000, and it must have mixed-mode authentication.

By default, the SMS installation installs SQL with the "sa" account and a blank password. If you want greater database security, you can change the password to a non-blank.

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

Customizing SMS 4.0

You can replace the SMS 4.0 banner and About box with your own graphics. See “Customizing the About Box Icon and Banner” on page 25.

You can also add your own documents and web links to those that are already part of the SMS 4.0 browser. For instructions, see “Storing Document Files and Web Links” on page 27.

Server Restarts

Whenever you restart your SMS 4.0 server computer (for example, for SMS updates or Windows OS updates), you must follow these steps:

1. Notify all SMS 4.0 remote users to shut down their SMS 4.0 browser connections.
2. After all browser connections are shut down, restart the SMS 4.0 server computer.
3. The remote users can reconnect to the server.

If the server computer restarts unexpectedly before clients can shut down their SMS 4.0 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.

CHAPTER 2—INSTALLATION

This chapter explains how to install the following Microsoft tools:

- Internet Information Services (IIS)
- Active Server Pages (ASP) and ASP.Net

There are also instructions for using the Launchpad to install SMS 4.0 and add-on products.

SMS LICENSING REQUIREMENTS

Each SMS 4.0 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 Standard:

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

System Manager Professional:

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

INSTALLING AND ENABLING IIS AND ASP.NET

Internet Information Services (IIS) enables SMS 4.0 to serve web pages to its browser clients. ***You must install IIS on the SMS 4.0 server computer BEFORE you run the SMS 4.0 installation.*** This section tells how to install and enable IIS. To install SMS, see the instructions beginning on page 9.

Active Server Pages (ASP) and ASP.Net (Active Server Pages for .Net Framework) 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 Server 2003:

You install ASP, ASP.Net, and IIS simultaneously; however, you must enable ASP.Net separately.

Windows 2000 Professional

Before you begin, locate the Windows 2000 Professional installation CD; you will use it during the install.

Click Start > Settings > Control Panel > Add/Remove Programs. On the left side of the Add/Remove Programs window, click Add/Remove Windows Components.

When the Windows Components window displays, check Internet Information Services (IIS). Click Next.

A wizard guides you through the rest of the process.

Windows XP

Before you begin, locate the Windows XP installation CD; you will use it during the install.

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.

When the Windows Components window displays, check Internet Information Services (IIS). Click Next.

A wizard guides you through the rest of the process.

Windows 2000 Server

Before you begin, locate the Windows 2000 Server installation CD; you will use it during the install. Follow these steps:

1. Click Start > Settings > Control Panel. Double-click Add/Remove Programs.
2. On the left side of the Add/Remove Programs window, click Add/Remove Windows Components. Click the Components button.
3. When the Windows Components Wizard window displays, check Internet Information Services (IIS). Click Next.

A wizard guides you through the rest of the process.

Installing IIS and ASP on Windows Server 2003

Follow these steps to install IIS, ASP, and ASP.Net on a computer that is running Server 2003 software:

1. Click Start > Settings > Control Panel. Double-click Add or Remove Programs.
2. When the Add/Remove Components screen displays, click the Windows Components button.
3. When the wizard screen displays, check Application Server, then click Details.
4. When the Application Server screen displays, check the following items:
 - Application Server Console
 - ASP.NET
 - Enable Network COM+ Access
 - Internet Information Services (IIS)
5. Click OK.
6. At the Windows Components screen, click Next.

Progress bars display while the components are installed and configured.

7. When the Windows Components Wizard screen displays, click Finish. Close the Add or Remove screen and the Control Panel.

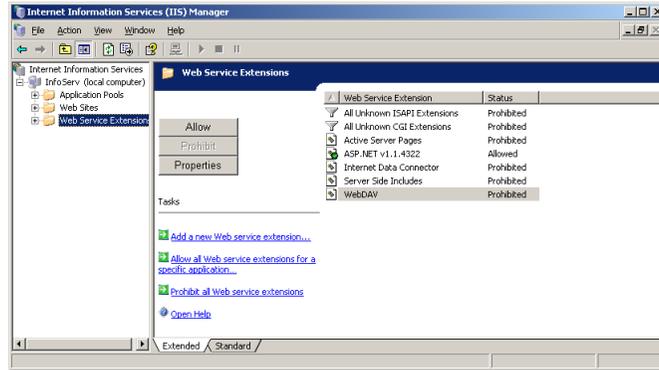
ASP, ASP.Net, and IIS are all installed. Follow the steps in the next section to enable ASP.Net.

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 > Programs > Administrative Tools > Internet Information Server (IIS) Manager.

The Internet Information Services (IIS) Manager screen displays:



2. From the tree view (left-hand pane of the screen), click the "+" next to the name of the local computer. Highlight Web Service Extensions.
3. In the right-hand pane, check the status of Active Server Pages. If it is prohibited, highlight the item name, and click Allow.

The status changes to Allowed.

4. Close the Internet Information Services (IIS) Manager screen.

NOTE: Verify that the ASP.NET status is also Allowed. If not, follow steps 3 and 4 for ASP.NET.

ASP.Net is now enabled.

NEW INSTALLATION, SYSTEM MANAGER DL AND SYSTEM MANAGER STANDARD

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 steps below to install SMS 4.0 for the first time.

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

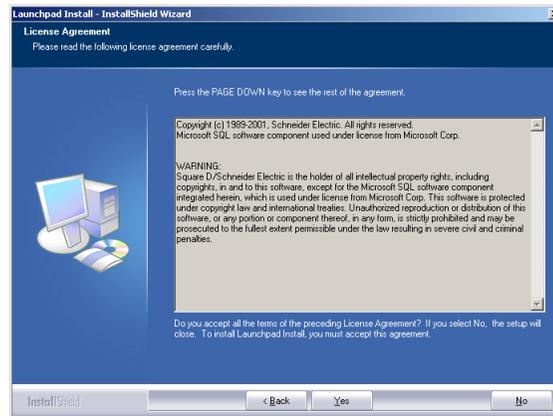
1. Insert *Disk 1* in the CD-ROM drive of the SMS 4.0 server computer.

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_SMSSE (LP_SMSDL for System Manager DL).

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

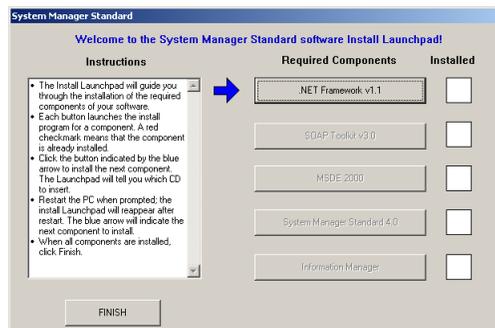
2. When the Welcome screen displays, click *Next*.

The Launchpad License Agreement dialog displays:



3. 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**.
4. 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 a component is already installed, a red check appears in the Installed column; you do not need to re-install this component. These instructions assume that none of the components are installed, and that you will install them in the order given.

.NET Framework Installation

5. Click the .NET Framework v 1.1 button.
6. When prompted to insert the .NET Framework CD, remove *Disk 1* and insert *Disk 2* in the CD-ROM drive.
7. Click **OK**.
8. When prompted whether you would like to install .NET Framework, click **Yes**.

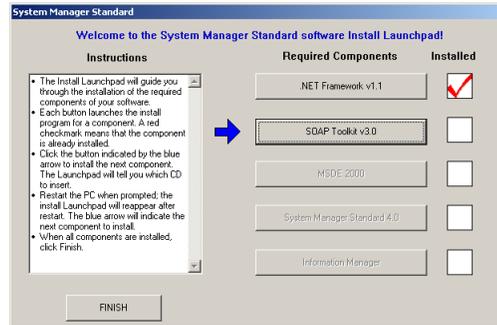
A progress bar displays, followed by the .NET Framework License Agreement screen.

9. 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.

10. Click OK.

After a series of verification screens, the Launchpad displays again (note that a red check appears next to .NET Framework v1.1, indicating that it was successfully installed).



SOAP Toolkit Installation

11. Click the SOAP Toolkit v 3.0 button.

The SOAP Toolkit 3.0 screen displays.

12. Click Yes to begin the install.

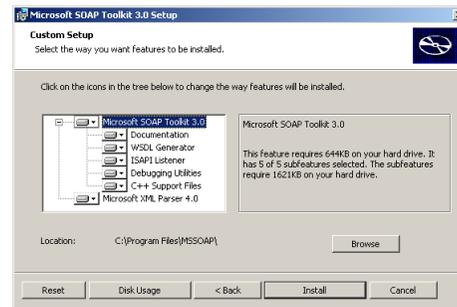
13. When the Welcome screen displays, click Next.

14. When the SOAP Toolkit license agreement screen displays, click the “I accept the terms in the License Agreement” radio button, then click Next.

The Customer Information screen displays.

15. Enter a user name and organization, or accept the default (from the Windows operating system registry). This user name is used only for SOAP toolkit; it does not need to match any other login information (Windows or SMS).

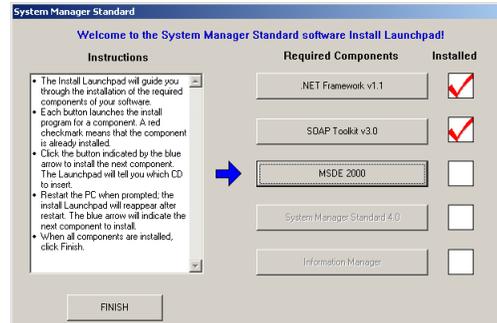
The Custom Setup screen displays:



16. You can accept the defaults that are listed in the box. Click Install.

17. When the install is complete, click Finish.

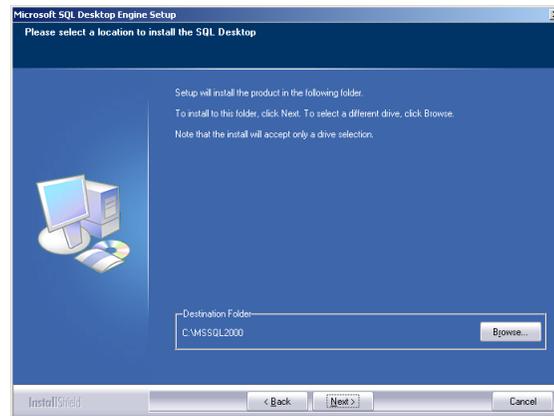
After a series of verification screens, the Launchpad displays again (note that a red check appears next to SOAP Toolkit, indicating that it was successfully installed).



MSDE 2000 (SQL) Installation

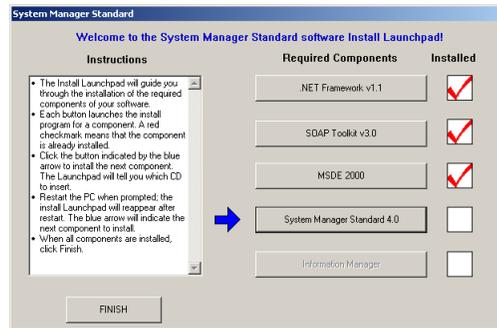
18. Click the MSDE 2000 button.
19. When prompted to insert the MSDE 2000 CD, remove *Disk 2* and insert *Disk 3* in the CD-ROM drive.
20. Allow the CD to completely load, then click OK.
21. When the Microsoft SQL Desktop license agreement screen displays, click the "I accept the terms of the license agreement" radio button; then click Next.

The SQL Desktop Destination Folder screen displays:



22. Browse to choose a location for SQL desktop, or accept the default. Click Next.
23. When the Start Copying Files screen displays, click Next.
24. When the Machine Reboot Required message displays, click OK. At the Windows login screen, you must log in with a Windows Administrator password.

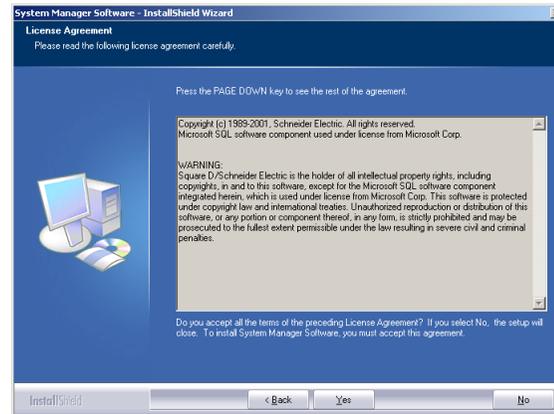
After the computer restarts, the Launchpad screen displays (note that MSDE 2000 has a red check beside it, indicating successful installation).



System Manager 4.0 Installation

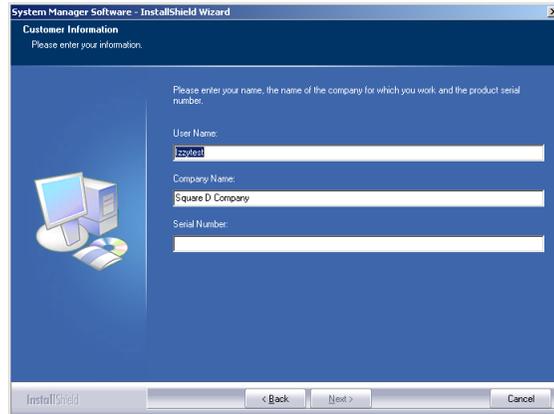
25. Click the System Manager Standard 4.0 (or System Manager DL 4.0) button.
26. When prompted to insert the System Manager 4.0 CD, remove *Disk 3* and insert *Disk 4* in the CD-ROM drive.
27. Allow the CD to completely load, then click OK.
28. When the Welcome screen displays, click Next.

The SMS License Agreement dialog displays:



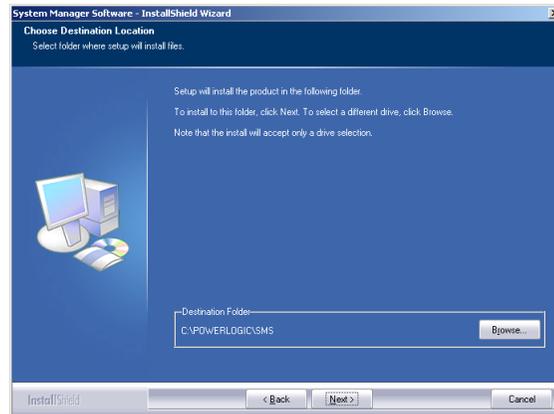
29. Before you continue, read the license agreement to be sure you accept its terms. To continue the installation, click *Yes*. To terminate the installation, click *No*.

The Customer Information screen displays:



30. Enter a user name and company name (these do not have to match any other SMS or Windows information). Enter the serial number, which is found on the CD case and on a card packed inside the software box. Click Next.

The Destination Location screen displays:



31. It is recommended that you accept the default drive: C:\POWERLOGIC\SMS. Click Next.

The SMS Account Setup screen displays:

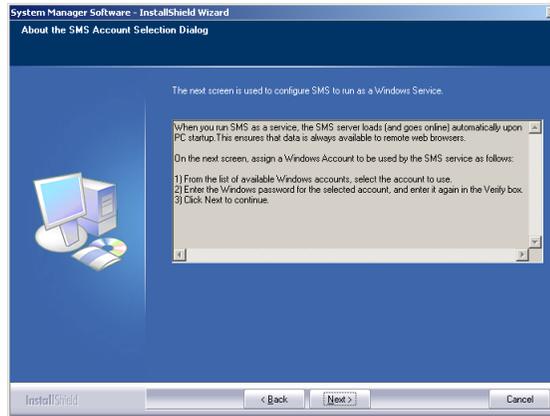


32. You must add one level 1 (administrator) account for SMS. The user name and password will be entered when you log on to SMS, both at the Setup Utility and through the browser. This is NOT a Windows password.

For information about adding additional SMS user accounts, and for the system features that are available at each level, see the SMS Setup Utility online help file.

After you type the user account information, click *Next*.

The About the SMS Account Selection screen displays:



33. 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:



34. 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.

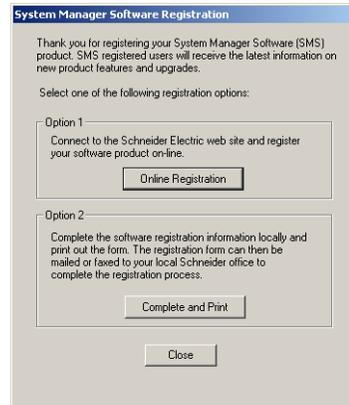
To run SMS as a Windows service: Do not check the box at the top of the screen. Enter a Windows administrator or power user account (or select the account from the list in the box). Enter the account's password, then retype the password to verify it. This account is used to synchronize the Windows account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

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

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

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

When setup is complete, the Registration Form dialog displays:



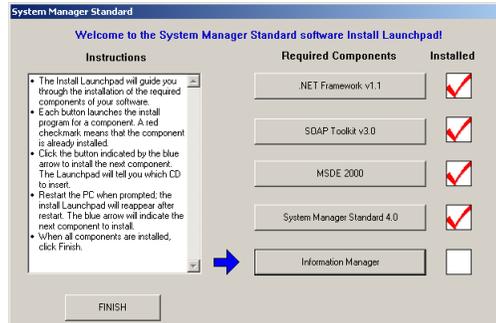
37. Have your SMS 4.0 product serial number available before you begin. The serial number, which registers ten SMS 4.0 client access licenses, is printed on the CD case and on a card that is in your software package. To register your SMS 4.0 software, click one of the option buttons:

- **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, and continue with step 38.
- **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.

If you wish 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.

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

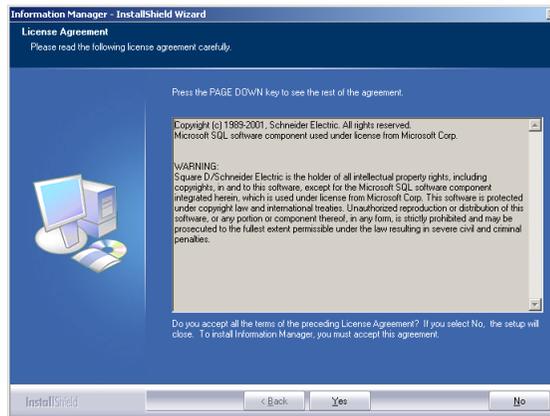
After the computer restarts, the Launchpad screen displays (note that the System Manager 4.0 button has a red check beside it, indicating successful installation).



Information Manager Installation

39. Click the Information Manager button.
40. When prompted to insert the Information Manager CD, remove *Disk 4* and insert *Disk 5* in the CD-ROM drive.
41. Allow the CD to completely load, then click OK.

The Information Manager License Agreement dialog displays:



42. 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*.

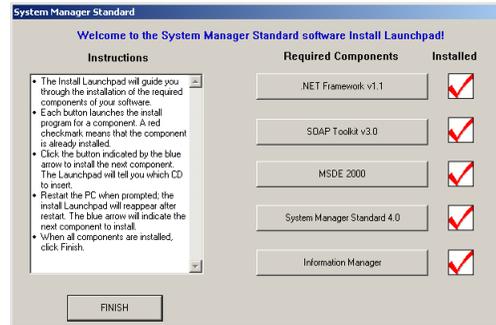
Some installation messages display, followed by the Windows Account Information screen (this account will be used to schedule reports; make a note of the account and password that you enter for future use):



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

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

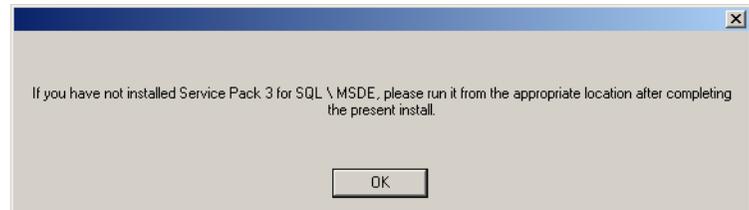
After the computer restarts, the Launchpad screen displays (note that the Information Manager button has a red check beside it, indicating successful installation).



45. Click Finish.
46. When prompted to insert the Launchpad CD, remove *Disk 5* and insert *Disk 1* in the CD-ROM drive.
47. Allow the CD to completely load, then click OK.

SQL Service Pack 3 Installation

The following message displays:



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

If you have not already installed SQL Service Pack 3 on the server computer, you should do so now.

Microsoft issued this service pack to defend against the “Slammer” virus. The service pack should be installed on any PC on which a SQL database is installed.

SQL Service Pack 3 Prerequisites

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>

Installation

To install the service pack, follow these steps:

1. Remove *Disk 1* and insert *Disk 2* in the CD-ROM drive.
2. Click Start > Run.
3. When the Run dialog displays, enter the following:

[CD drive]:\MSDE2000\setup.exe

NOTE: Replace [CD drive] with the letter of your CD drive.

4. Follow the on-screen instructions to install the service pack. The installation will cause an automatic reboot of the PC when it is finished.

You are now ready to begin using SMS.

NOTE: If the Service Pack fails to install, we recommend that you download and install the most recent MSDE service pack from the Microsoft website.

Optional Installs

If you have purchased optional add-on software (for example, GFX or WebXTR), you can install them now. Use the CD and installation instructions provided with the add-on product.

UNINSTALLING AND REINSTALLING SMS 4.0

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

Uninstalling SMS 4.0

To uninstall SMS 4.0 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 the Setup Utility and the SMS Configuration Utility. If you are not running the PowerLogic Network Server as a Windows service, close it, too.
4. Use the Add/Remove Programs feature (Start > Settings > Control Panel) to remove these two programs, in order:

Information Manager
SMS 4.0.

5. After you complete the remove procedure, reconnect the network cable to the server computer.

Reinstalling SMS 4.0

To reinstall SMS 4.0 and its components, do the following:

1. Insert *Disk 1* (Install Launchpad) CD-ROM drive of the server computer.
2. Using the Launchpad, install the appropriate components (if .NET Framework and SOAP Toolkit were not uninstalled, skip these steps).

NOTE: Remember: Do NOT reinstall MSDE.

3. If you have purchased the GFX add-on software, reinstall it from the CD that was shipped with your GFX order.

ADDITIONAL SMS 4.0 CLIENT LICENSES

When you purchase System Manager DL or System Manager Standard, you receive one SMS 4.0 client access license. This license permits one browser connection to SMS 4.0. You can purchase a product called WebXTR, which provides an additional five simultaneous browser connections. To order WebXTR, contact your Schneider Electric representative.

When you receive the additional client 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 4.0. For registration instructions, see the installation instructions on page 16 of this chapter.

INSTALLING ADD-ON PRODUCTS AFTER SMS 4.0 IS INSTALLED

When SMS 4.0 is already installed, follow the procedure below to install any add-on products (for example, GFX or a Sepam device type) that you are using:

1. Disconnect the network cable to the SMS 4.0 server.
2. Reboot the computer.
3. 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.
4. Reconnect the network cable.
5. Reboot again.

CHAPTER 3 — USING SMS 4.0

This chapter provides information on accessing SMS 4.0, using a browser and launching the Setup Utility, and using reports.

ACCESSING SMS 4.0

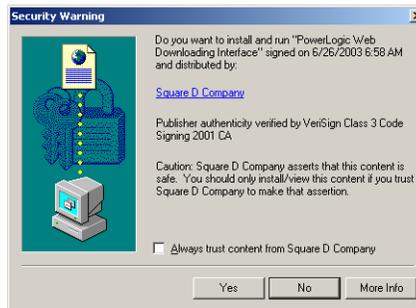
This section describes how to access the SMS 4.0 server from the server computer, and how to deploy SMS 4.0 (provide SMS 4.0 access) to remote users.

Accessing the Server Computer

To access the SMS 4.0 server computer, follow these steps:

1. At any computer that will access SMS 4.0, 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 will not be able to access the SMS 4.0 browser main window.
3. Launch the SMS 4.0 browser: From the server computer, click Start > Programs > POWERLOGIC > System Manager Software.

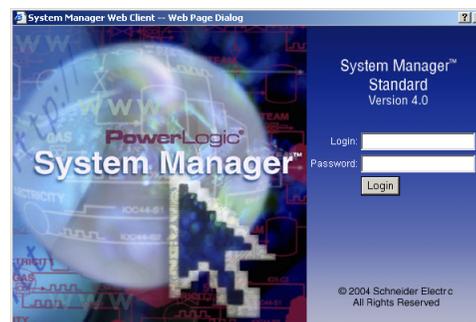
The first time you access the SMS 4.0 server, the following Security Warning screen displays:



4. To ensure that the tree control in the left pane displays, you must install these POWERLOGIC ActiveX controls. Click Yes.

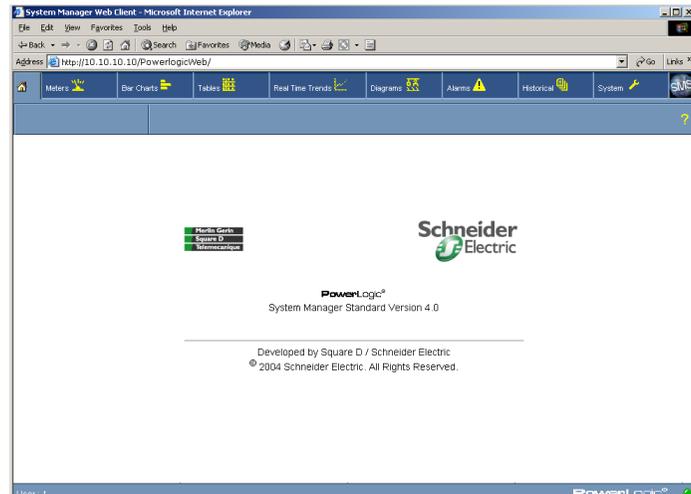
NOTE: If errors display after you click Yes at the Security Warning, your Windows account security may not permit installation of the user interface controls. To install them, you must be a power user or administrator on the remote computer. Contact your system administrator for help.

The POWERLOGIC Web Client login screen displays:



5. 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 the Setup Utility. 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 4.0 home page displays:



Delivering SMS 4.0 to System Users

Establishing User Names and Passwords

Before users will be able to access and use SMS 4.0, you must establish user names and passwords in the SMS Setup Utility. SMS users will enter their name and ID when accessing SMS from the Setup Utility 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 the Setup Utility. See the Setup Utility online help file for a table that illustrates user access levels.

NOTE: When System Manager DL or System Manager Standard is installed on a computer that has the Windows Server 2003 operating system, access to the Setup Utility is limited. You must sign on to the server computer as a Windows Administrator to be able to access the Setup Utility. However, users of any level can access SMS data through the browser.

To add SMS user names and passwords, open the Setup Utility from the SMS 4.0 server, then access the user accounts feature (Setup > Administrative > User Accounts). For instructions, see the Setup Utility online help file.

Notifying Users

Once you have set up user names and passwords, you must give each user the following information:

- the user ID and password they are to use when accessing SMS 4.0
- the URL link to the SMS 4.0 server computer

Opening an SMS 4.0 Browser Session as a Remote User

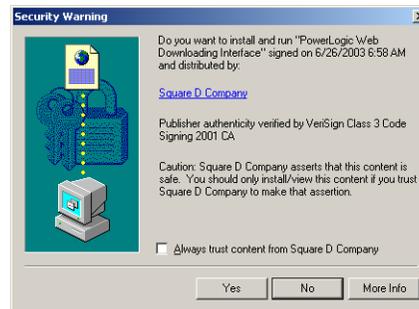
To open an SMS 4.0 session from a remote computer, follow these steps.

1. The SMS 4.0 server must be accessible. If it is not, follow instructions in “Accessing the Server Computer” on page 21 to launch the browser.
2. At the remote computer, open Internet Explorer.
3. Enter the computer name or IP address for the SMS 4.0 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

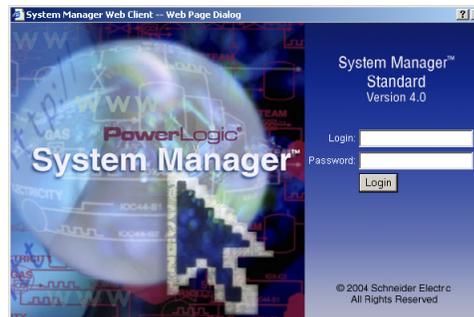
The first time you open an SMS 4.0 session at a remote computer, the following Security Warning screen displays:



4. To ensure that the tree control in the left pane displays, you must install these POWERLOGIC ActiveX controls. Click Yes.

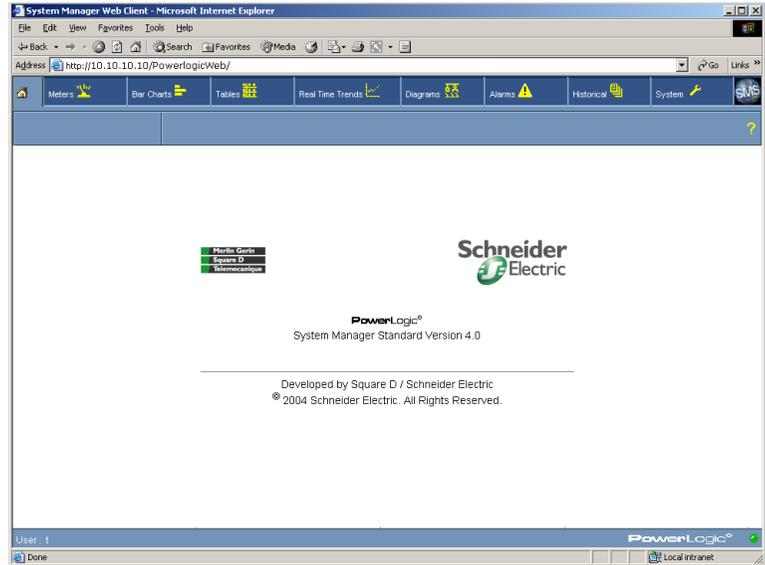
NOTE: The tree control displays when you click a tab—such as Meters or Bar Charts—on the SMS browser main window. If the left pane does not display the tree control, your Windows account security did not permit installation of ActiveX controls. To install ActiveX controls, you must be a power user or administrator. Contact your system administrator to remedy the situation.

The POWERLOGIC Web Client login screen displays:



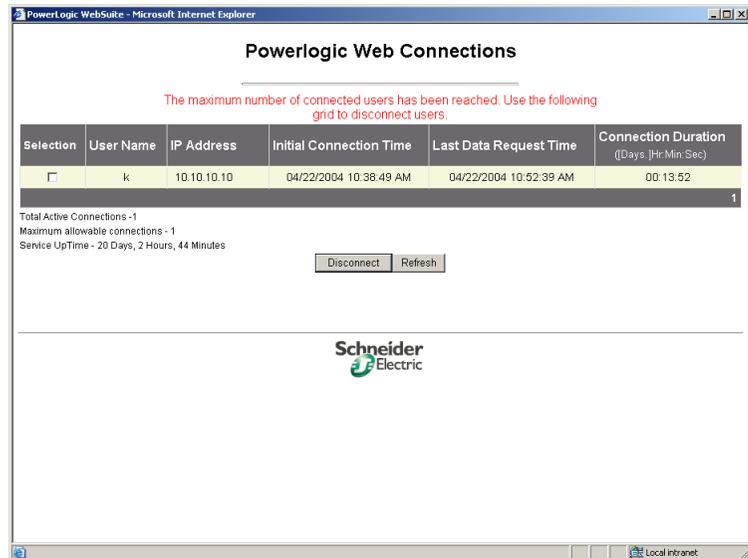
5. Enter a valid login ID and password for the SMS software installed on the host computer. This is the user account that is created in the Setup Utility. The user account that you use must have both ID and password (blanks not acceptable). You receive this ID and password from your POWERLOGIC system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

The SMS 4.0 home page displays:



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 Setup Utility

To access the Setup Utility, follow these steps:

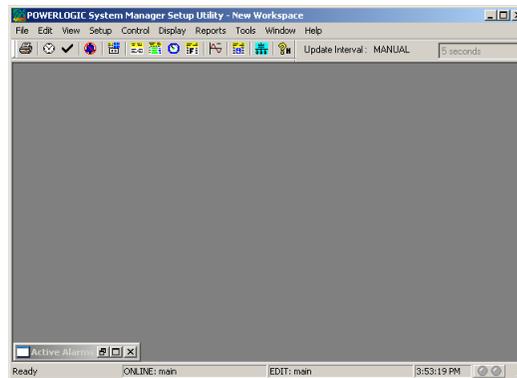
1. From the server computer, click Start > Programs > POWERLOGIC > SMS Setup.

The SMS Setup Login screen displays:



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

SMS 4.0 splash screen displays briefly, followed by the SMS Setup Utility main window:



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

NOTE: 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 3–1 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 4.0 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 3–1 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.

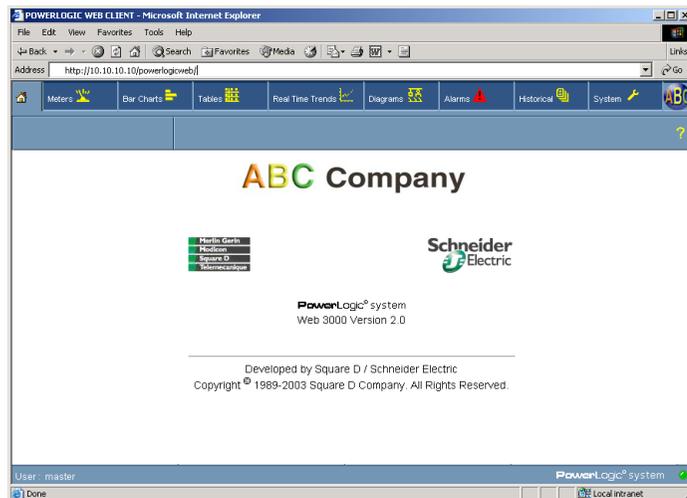


Figure 3–1: Home page with customized About box and banner

For information about using features in the SMS 4.0 browser, see the SMS 4.0 online user’s guide: Click System > Documentation and Links; from the tree control, select SMS 4.0 User’s Guide.

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

NOTE: 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

When you view a PDF document, the Adobe Acrobat Reader plug-in is launched within the browser window. If you 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 4.0 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.

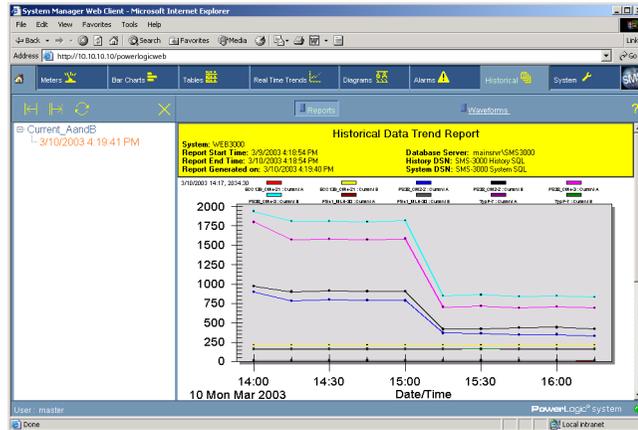
Information Manager allows you to create, schedule, print, and view reports containing historical data from PowerLogic System devices. If you need help creating and using reports, see the online help file that is in Information Manager. To access the help file, open Information Manager, then click Help > 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 4.0 main window.

You can view the report from any remote computer that accesses SMS 4.0, without launching the Setup Utility on the server computer. To view a report,

click its name; it displays in the right pane of the SMS 4.0 window. The following is an example of a historical data trend report.



Printing Information Manager Reports

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 4.0 Setup Guide

Square D / Schneider Electric
295 Tech Park Dr, Suite 100
LaVergne, TN, 37086 USA
1-615-287-3400
1-888-SquareD (1-888-778-2733)
www.PowerLogic.com

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