

# Wonderware® Information Server Installation Guide

Invensys Systems, Inc.

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# Welcome

This guide describes how to install Wonderware Information Server.

The Wonderware Information Server builds on the existing Wonderware Internet functionality, and provides even more power and configurability. Wonderware Information Server is tightly integrated with Microsoft Internet Information Server.

The Wonderware Information Server uses the latest rendering technologies so that application windows developed in InTouch can be viewed over the Internet with better performance using only a browser. Working knowledge of Microsoft Internet Information Services, Microsoft SQL Server, and Windows operating systems is required.

This administrator's guide assumes that you are familiar with administering an Internet Information Server and using the administrative tools provided with the Microsoft Windows Server 2003, Windows Server 2008, or Windows Vista operating system.

For more information on Internet Information Server, Microsoft SQL Server, Microsoft Windows Server operating system, or Microsoft Windows Vista Business operating system, see your Microsoft documentation.

## Documentation Set

The Wonderware Information Server documentation set includes the following guides:

**Wonderware Information Server Installation Guide.**

This guide describes how to install Wonderware Information Server.

**Wonderware Information Server Administration**

**Guide.** This guide describes how to install Wonderware Information Server, administer and maintain an installed Wonderware Information Server, and how to access factory information over the Internet/intranet via the Wonderware Information Server 4.0 Wonderware Information Server. The installation section includes hardware and software requirements and migration instructions. The administration section includes information on configuring data sources, managing security, and performing customizations, accessing factory information over the Internet/intranet via the Wonderware Information Server, and using the TableWeaver and reporting features.

**Wonderware Information Server Win-XML Exporter**

**Guide.** This guide describes how to use the Wonderware Information Server Win-XML Exporter to convert InTouch application windows to web pages and publish them to the Wonderware Information Server software. This guide also describes how to best design InTouch windows so that they can be successfully converted.

**ArchestrA Web Exporter Guide.** This guide describes how to use the ArchestrA Web Exporter to publish ArchestrA Symbols and InTouch Windows to Wonderware Information Server. This guide also describes how to add, delete and modify WindowSets and TableWeaverSets of the project and preview them in the preview window of the ArchestrA Web Exporter.

All of these guides are provided in PDF form and can be printed. Also, information included in in the Administration and Win-XML guides is provided in browser-based online Help, which can be accessed from the Wonderware Information Server software.



## Documentation Conventions

This documentation uses the following conventions:

Convention	Used for
Initial Capitals	Paths and filenames.
<b>Bold</b>	Menus, commands, dialog box names, and dialog box options.
Monospace	Code samples and display text.

## Technical Support

Wonderware Technical Support offers a variety of support options to answer any questions on Wonderware products and their implementation.

Before you contact Technical Support, refer to the relevant section(s) in this documentation for a possible solution to the problem. If you need to contact technical support for help, have the following information ready:

- The type and version of the operating system you are using.
- Details of how to recreate the problem.
- The exact wording of the error messages you saw.
- Any relevant output listing from the Log Viewer or any other diagnostic applications.
- Details of what you did to try to solve the problem(s) and your results.
- If known, the Wonderware Technical Support case number assigned to your problem, if this is an ongoing problem.



# Chapter 1

## Getting Started

Installing Wonderware Information Server is a three-part process:

- 1 Installing and configuring pre-requisite software, such as the operating system, Microsoft SQL Server, Internet Information Services (IIS), and so on.
- 2 Installing the Wonderware Information Server product files.
- 3 Configuring the Wonderware Information Server so that it is ready for use.

## About the Wonderware Information Server

Wonderware Information Server provides enterprise-wide viewing of all information from the plant floor over the Internet or company intranet. You can use Wonderware Information Server together with Internet Explorer to view reports from a variety of data sources, including reports, documents, alarms, and historical and real-time information.

You can also use Wonderware Information Server to view and interact with InTouch application windows that have been converted with the Win-XML Exporter or ArcestrA Web Exporter. These windows show all graphics and animation with real-time links to the factory floor, just as they do in InTouch WindowViewer™, but they do not require InTouch installed on the client computer.

Other features of Wonderware Information Server include:

- MultiViews, which are web displays that contain web-based content, such as HTML pages or Extensible Markup Language (XML) code. This content is stored in reusable components called Web Parts.
- Access panels, a logical grouping of navigation nodes (folders) and links that is only accessible to particular users assigned to it.
- The ActiveFactory Reporting Website, a collection of features that provide a wide array of reporting capabilities from the Wonderware Historian (formally known as IndustrialSQL Server).
- A reporting capability based on the Microsoft SQL Server Reporting Services (SSRS). This feature lets you create, deploy, and execute SSRS reports within the Wonderware Information Server. There are also interface options available to trigger those reports from Wonderware Application Server and the Wonderware Historian.

## Web Server Requirements and Recommendations

Your first step in deploying Wonderware Information Server is to install and configure the web server computer that hosts the Wonderware Information Server web site. In general, use a fast server-class computer with sufficient power to handle the expected load on the web site.

Do not install Wonderware Information Server on a domain controller computer. This is not supported.

## Hardware Requirements

The following web server hardware requirements are recommended to handle a load of 50 concurrent users:

Minimum	Suggested
2.5 GHz Pentium IV	3 GHz Pentium IV
2 GB RAM	Greater than 2 GB RAM
10 GB of disk space (NTFS required)	20 GB or more of disk space, depending on the number of InTouch windows, and the number of ActiveFactory, ArcestrA Symbols and ArcestrA Reports published to the site.

## Operating System Requirements

You can install Wonderware Information Server 4.0 on a server computer running one of the following operating systems:

- Microsoft Windows Vista SP2 (32-bit and 64-bit), Ultimate, Business, and Enterprise Editions
- Microsoft Windows 2003 R2 (32-bit only), Standard and Enterprise Editions

For more information, see Guidelines for Installing Microsoft Operating Systems on page 17.

**Note** The Multiviews feature is not supported on the 32-bit version of Windows Vista and the 64-bit versions of Windows Server 2008 and Windows Vista.

## Software Requirements

You must install the following software on the web server computer before installing Wonderware Information Server:

- Microsoft Internet Information Services (IIS) 6.0 or IIS 7.0. For more information, see Guidelines for Installing Microsoft Internet Information Services (IIS) and ASP.NET on page 25.
- ASP.NET 2.0 or later. For more information, see Guidelines for Installing Microsoft Internet Information Services (IIS) and ASP.NET on page 25.
- Microsoft SQL Server 2005 SP3 or SQL Server 2008 SP1 (32-bit Express, Standard, and Enterprise). For more information, see Guidelines for Installing Microsoft SQL Server on page 20. ArcestrA Reports are not supported on SQL Server 2008 Express Edition.
- To use Windows SharePoint 3.0, you must install Microsoft .NET Framework 3.5 SP1 or later.

You may need to install the following additional software on the web server computer depending on the Wonderware Information Server features you install:

- To install MultiViews feature, you must first install and configure Windows SharePoint Services 3.0 SP2. For more information, see Guidelines for Installing and Uninstalling SharePoint Services on page 36.
- To install the ArcestrA Reports feature, you must install and configure Microsoft SQL Server Reporting Services on the same node as Wonderware Information Server. For more information, see Guidelines for Installing Microsoft Reporting Services on page 28.
- To use ActiveFactory Reporting, you must install Microsoft Excel 2003 or 2007.

For all software, apply the latest service packs and patches.

In addition, client users must be members of the same Windows domain, or a trusted domain, as the web server.

## Using a Domain Controller with Wonderware Information Server

The purpose of a domain controller is simply to authenticate users in a Windows domain for security reasons.

Wonderware Information Server is designed to take advantage of a domain controller for the following security functions:

- **Grant/deny users access to the site.** If a user logged on to the company network and is authenticated by the domain controller, the Wonderware Information Server handles that user as an authenticated login and then proceed to authorize the user according to the security role to which the user has been assigned. However, if a user attempts to access Wonderware Information Server from a computer that is not logged onto the network, a dialog box appears in which the user must provide a valid user name and password for the domain. After entering the appropriate information, the user is authenticated on the network by the domain controller and is granted or denied access. The use of domain logins to provide access is made possible by the use of integrated Windows security by Wonderware Information Server.
- **Assign user privileges within Wonderware Information Server.** Because Wonderware Information Server uses integrated Windows security, the product automatically connects to all the domains that it is a member of and returns a list of users already configured in that domain. This allows you to save time and effort when assigning role-based privileges for Wonderware Information Server. In addition, users are able to have one account and password to access the company network and Wonderware Information Server, instead of multiple names and passwords.

Also, if you do not use a domain controller, Wonderware Information Server uses CPU resources to authenticate users instead of serving them web pages.

Because of these benefits, it is recommended that you use an existing domain controller or install a new domain controller. This allows you to manage users in the company domain separately.

For more information on domain controllers, see your Microsoft documentation or visit the Microsoft web site at [www.microsoft.com](http://www.microsoft.com).

### Using an Existing Domain Controller

If you already have a domain controller in place, you need to add the Wonderware Information Server computer to the domain as a resource. You can add the Wonderware Information Server computer to the domain in advance of deployment.

When you deploy the Wonderware Information Server, the domain resource administrator should be present to verify proper connections to other domain resources, such as SQL Server, the Wonderware Historian, Wonderware Application Server, and InTouch computers.

### Using Wonderware Information Server without a Domain Controller

If your company does not have a domain controller and does not have plans to upgrade and install a domain controller, you can still use Wonderware Information Server. However, the web server that Wonderware Information Server is installed on has to perform user authentication, and all users need to be created in the local user store on the web server. For information on adding local user accounts, see your Windows documentation. For more information on security, see the Wonderware Information Server Administration Guide.



# Chapter 2

## Installing and Configuring Pre-Requisite Software

Before you install Wonderware Information Server, you must first install and configure pre-requisite software, such as the operating system, Microsoft SQL Server, Internet Information Services (IIS), and so on.

### Guidelines for Installing Microsoft Operating Systems

The following sections provide guidelines for installing the supported Microsoft operating systems. For the list of supported operating systems, see Operating System Requirements on page 13.

## Guidelines for Installing Microsoft Windows Server 2003

You can install Wonderware Information Server 4.0 on a server computer running Windows Server 2003 SP2 or Windows Server 2003 SP2 R2 32-bit, Standard and Enterprise Editions. This operating system incorporates Internet Information Services (IIS) 6.0 as part of the default installation.

The following instructions are provided as a guide and do not constitute the entire Windows Server 2003 setup that your company guidelines may require, or that you may encounter while installing the operating system software. These instructions only document specific options you need to configure during the installation.

- Install the operating system on an NTFS partition.
- Install the defaults for Windows Server 2003 components. Select the following IIS components:
  - Common Files
  - Documentation
  - Internet Information Services
  - Internet Services Manager (HTML)
  - SMTP Service
  - World Wide Web Service
- If you have decided not to use a domain controller (not recommended), set up the local computer with users and passwords at this time. For more information, see Using Wonderware Information Server without a Domain Controller on page 16.
- Check the Microsoft web site for updates and patches that you may need to install.

## Guidelines for Installing Microsoft Windows Server 2008

You can install Wonderware Information Server 4.0 on a server computer running Windows 2008 Server R2 (64-bit only) Standard and Enterprise. This operating system does not incorporate Internet Information Services 7.0 as part of the default installation.

The following instructions are provided as a guide and do not constitute the entire Windows Server 2008 setup that your company guidelines may require, or that you may encounter while installing the operating system software. These instructions only document specific options you need to configure during the installation.

- Install the operating system on an NTFS partition.
- Install the defaults for Windows Server 2008 components. If you have decided not to use a domain controller (not recommended), set up the local computer with users and passwords at this time. For more information, see *Using Wonderware Information Server without a Domain Controller* on page 16.
- Check the Microsoft web site for updates and patches that you may need to install.

## Guidelines for Installing Microsoft Windows Vista

Wonderware Information Server 4.0 can be installed on a server computer running the Windows Vista SP2 (32-bit and 64-bit), Ultimate, Business, and Enterprise Edition operating system. This operating system does not include Internet Information Services (IIS) 7.0 as part of the default installation.

There are some limitations for using Wonderware Information Server on Windows Vista:

- The Wonderware Information Server MultiViews feature is not supported on the Vista because SharePoint is not supported on Vista.
- Using Wonderware Information Server on Windows Vista is only appropriate for smaller applications, because of the Vista-imposed limits on the number of users.

The following instructions are provided as a guide and do not constitute the entire Windows Vista setup that your company guidelines may require, or that you may encounter while installing the operating system software. These instructions only document specific options you need to configure during the installation.

- Install the operating system on an NTFS partition.
- Install the Windows Vista components. If you have decided not to use a domain controller (not recommended), set up the local computer with users and passwords at this time. For more information, see *Using Wonderware Information Server without a Domain Controller* on page 16.
- Check the Microsoft web site for updates and patches that you may need to install.

## Guidelines for Installing Microsoft SQL Server

Wonderware Information Server uses Microsoft SQL Server to store vital configuration information, such as administrative passwords. Wonderware Information Server needs continuous access to the SQL Server to run properly.

For the list of supported SQL Server versions, see *Software Requirements* on page 14.

You can use a SQL Server located anywhere on the same network. If you choose to use a SQL Server that is on a computer other than the one you will install the Wonderware Information Server on, you must:

- Install the Microsoft SQL Server Client Tools on the Wonderware Information Server computer and configure client-side TCP/IP connectivity to the remote SQL Server.
- Exclude TCP Port 1433 and Port 80 from the Windows firewall on the remote SQL Server computer.

Wonderware Information Server can be used with a case-sensitive or case-insensitive SQL Server database.

If you want to use the ArchestrA Reporting Services feature of Wonderware Information Server, you must install SQL Server Reporting Services on the SQL Server computer. It is best to select Reporting Services as part of the original SQL Server installation, rather than to try to add it later.

## Guidelines for Installing Microsoft SQL Server 2005

After you install the original release version of SQL Server 2005, you must apply SQL Server 2005 Service Pack 3 to obtain support from Microsoft.

SQL Server 2005 Enterprise Edition is not supported on Windows Vista.

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**Important** During the Microsoft SQL Server installation, be sure that you select mixed mode as the authentication mode.

---

### To install SQL Server 2005

- 1 Insert the SQL Server Installation CD into the CD-ROM drive. The installation window appears.
- 2 Click **Install/Server components, tools, Books Online, and samples**.
- 3 Click **Next** to progress through the installation windows.
- 4 When the **Components to Install** window appears, select the following:
  - **SQL Server Database Services**
  - **Reporting Services**
  - **Workstation components, Books Online and development tools**
- 5 Click **Next**. The **Instance Name** window appears.
- 6 Configure the instance. Do the following:
  - a Select **Default instance**. The **Service Account** window appears.
  - b Click **Use the Built-in System Account** and select **Local system**.
- 7 Click **Next**. The **Authentication Mode** window appears.
- 8 Configure the authentication details. Do the following:
  - a Select **Mixed Mode**.
  - b Enter your system administration username and password.
- 9 Click **Next**. The **Collation Settings** window appears.
- 10 Configure the collation settings.

- 11 Click **Next**. The **Report Server Installation Options** window appears.
- 12 Select **Install the default configuration**.
- 13 Click **Next** to complete the SQL Server installation.

## Guidelines for Installing Microsoft SQL Server 2008

These instructions are for installing a new SQL Server as a stand-alone installation.

Archestra Reports are not supported on SQL Server 2008 Express Edition.

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**Important** During the Microsoft SQL Server installation, be sure that you select mixed mode as the authentication mode.

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### To install SQL Server 2008

- 1 Insert the SQL Server installation CD into the CD-ROM drive. The **SQL Server Installation Center** window appears.
- 2 In the left pane, click **Installation**.
- 3 In the right pane, click to start the new SQL Server stand-alone installation wizard.
- 4 Click **Next** to progress through the installation windows.
- 5 When the **Feature Selection** window appears, select the following features, at a minimum:
  - **Database Engine Services**
  - **Reporting Services**
  - **Client tools**
- 6 Click **Next**. The **Instance Configuration** window appears.
- 7 Click **Default instance**.

- 8 Click **Next**. Continue with the installation until the **Server Configuration** window appears.

Service Accounts | Collation

Microsoft recommends that you use a separate account for each SQL Server service.

Service	Account Name	Password	Startup Type
SQL Server Agent			Manual
SQL Server Database Engine			Automatic
SQL Server Reporting Services			Automatic
SQL Server Integration Services 10.0	NT AUTHORITY\Network...		Automatic

Use the same account for all SQL Server services

These services will be configured automatically where possible to use a low privilege account. On some older Windows versions the user will need to specify a low privilege account. For more information, click Help.

Service	Account Name	Password	Startup Type
SQL Server Browser	NT AUTHORITY\LOCAL S...		Disabled

- 9 For the service accounts, specify the network account unless otherwise required by your environment. If the SQL Server is installed on the same computer as the Wonderware Information Server, then you can use the localsystem account. However, you will need to be sure to specify a network account when you use the Wonderware Information Server Backup and Restore utility.

- 10 Click **Next**. The **Database Engine Configuration** window appears.

- 11 Configure the authentication details. Do the following:
- a Click **Mixed Mode**.
  - b Enter your system administration username and password.
- 12 Click **Next**. The **Report Server Installation Options** window appears.

- 13 Click **Install the native mode default configuration**.
- 14 Click **Next** to continue installing the SQL Server per your requirements.



## Guidelines for Installing Microsoft Internet Information Services (IIS) and ASP.NET

Wonderware Information Server requires Microsoft Internet Information Services (IIS) and ASP.NET.

If you did not include these options as part of the operating system installation, you will need to add them.

### Guidelines for Installing IIS and ASP.NET on Windows Server 2003

The Windows Server 2003 operating system incorporates Internet Information Services (IIS) v6.0 as part of the default installation.

#### To install Internet Information Services and ASP.NET

- 1 On the Windows **Start** menu, point to **Settings**, and then click **Control Panel**. The Control Panel appears.
- 2 Double-click **Add or Remove Programs**. The **Add or Remove Programs** window appears.
- 3 Click **Add/Remove Windows Components**. The Windows Components Wizard appears.
- 4 Select **Application Server**.
- 5 Click **Details**. A list of subcomponents of the application server appears.
- 6 Check **ASP.NET** and **Internet Information Services (IIS)**.
- 7 Highlight Internet Information Services (IIS) and click **Details**.
- 8 Check the following subcomponents of Internet Information Services (IIS):
  - Common Files
  - Internet Information Services Manager
  - SMTP Service
  - World Wide Web Service

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**Note** SMTP Service is a requirement for Sharepoint Services.

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- 9 Click **OK** twice. The Windows Component Wizard appears.
- 10 Click **Next** to begin installing the selected components.

## Guidelines for Installing IIS and ASP.NET on Windows Server 2008 and Windows Vista

The Windows Server 2008 and Windows Vista operating systems do not incorporate IIS as part of the default installation.

### To configure ASP.NET and IIS

- 1 On the Windows **Start** menu, click **Control Panel**. The Control Panel appears.
- 2 Click **Programs**, and then double-click **Programs and Features**.
- 3 Click **Continue** in the **User Account Control** dialog box.
- 4 Click **Turn Windows features on or off**.
- 5 In the **Windows Features** dialog box, expand **Internet Information Services**, expand **Web Management Tools**, expand **IIS6 Management Compatibility**, and then select the following check boxes:
  - **IIS 6 WMI Compatibility**
  - **IIS Metabase and IIS 6 configuration compatibility**Also select the following check boxes:
  - **IIS Management Console**
  - **IIS Management Scripts and Tools**
  - **IIS Management Service**
- 6 Expand **World Wide Web Services**, expand **Application Development Features**, and then select the following check boxes:
  - **.NET Extensibility**
  - **ASP**
  - **ASP.NET**
  - **ISAPI Extensions**
  - **ISAPI Filters**

- 7 Expand **Common HTTP Features**, and then select the following check boxes:
  - **Default Document**
  - **Directory Browsing**
  - **HTTP Errors**
  - **HTTP Redirection**
  - **Static Content**
- 8 Expand **Health and Diagnostics**, and then select the following check boxes:
  - **HTTP Logging**
  - **Request Monitor**
- 9 Expand **Performance Features**, and then select the **Static Content Compression** check box.
- 10 Expand **Security**, and then select the following check boxes:
  - **Request Filtering**
  - **Windows Authentication**
- 11 After you enable the required features, start the World Wide Publishing service if you want to install the default configuration of Reporting Services. Otherwise, the SQL Server Setup program only installs Reporting Services and does not configure Reporting Services.
- 12 Install the Microsoft WebDAV extension for IIS 7.0.

There are two versions, one for 32-bit operating systems and one for 64-bit. You can download the extension from <http://www.iis.net>. You only need to install the extension files. The Wonderware Information Server Configurator utility will enable and set up authoring rules for the winroot folder during the core Information Server configuration.

## Guidelines for Installing Microsoft Reporting Services

You must have the SQL Server Reporting Services installed to use the ArchestrA Reporting Services features of Wonderware Information Server.

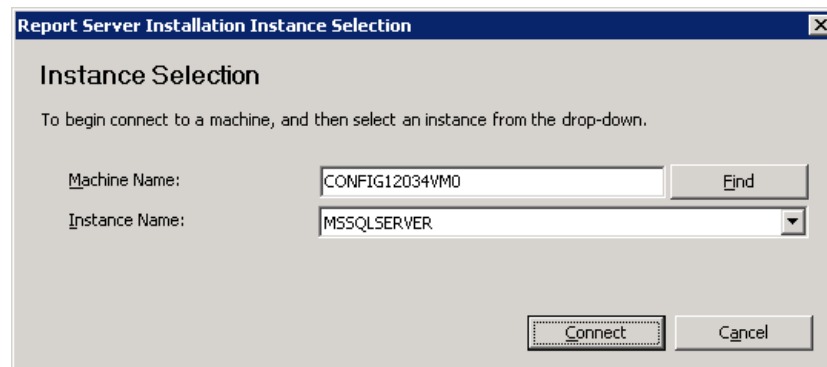
## Guidelines for Configuring SQL Server 2005 Reporting Services on Windows Server 2003

You can use the default settings for SQL Server 2005 Reporting Services. Check the settings and if they are already set by default, do not try to reset them as an error will occur.

You must have IIS and ASP.NET installed before configuring SQL Server Reporting Services. For more information, see Guidelines for Installing IIS and ASP.NET on Windows Server 2003 on page 25.

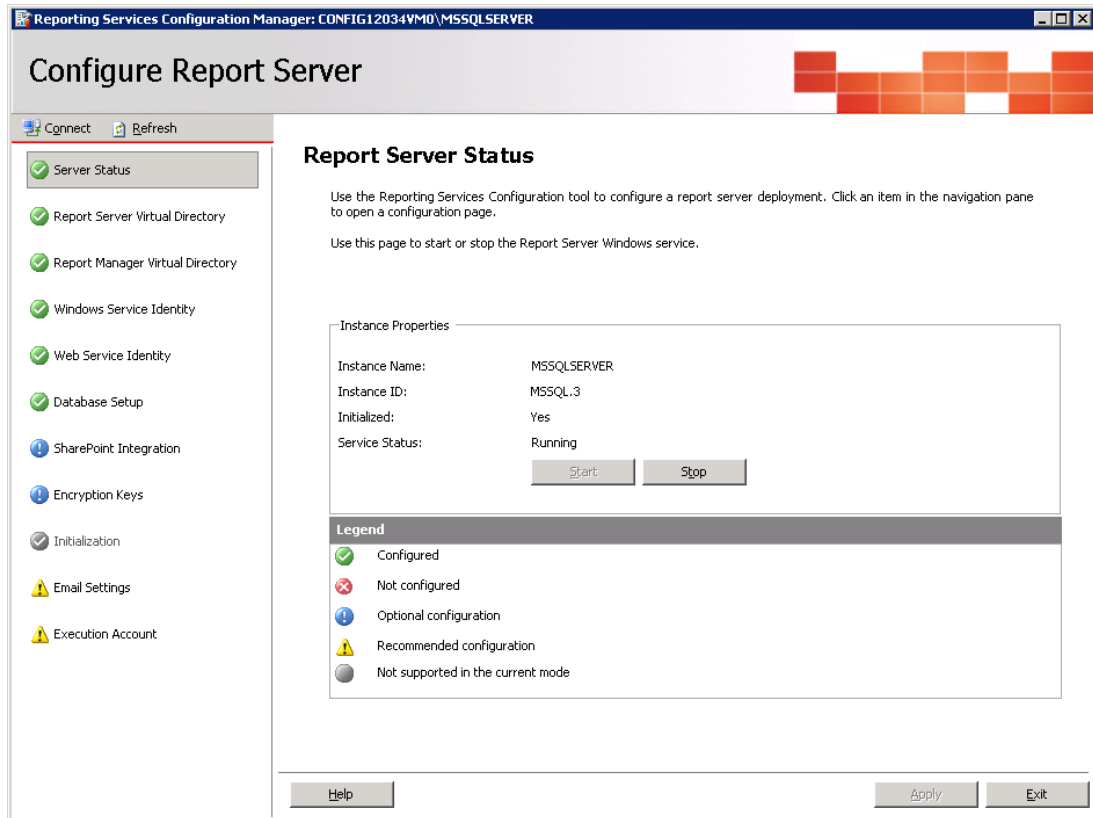
### To configure the SQL Server Reporting Services

- 1 On the Windows **Start** menu, point to **Programs, Microsoft SQL Server 2005, Configuration Tools**, and then click **Report Server Configuration**. The **Instance Selection** page appears.



- 2 Configure the instance. Do the following:
  - a In the **Machine Name** box, enter the name of the local report server node.
  - b In the **Instance Name** box, enter **MSSQLSERVER**.

- c Click **Connect**. After the connection has been established, the Report Server Status page appears. The Server Status should appear as **Running**.



- 3 A checkmark should appear next to the following components:
  - Report Service
  - Report Server Virtual Directory
  - Report Manager Virtual Directory
  - Windows Service Identity
  - Web Service Identity
  - Database Setup
- 4 Click **Exit**.

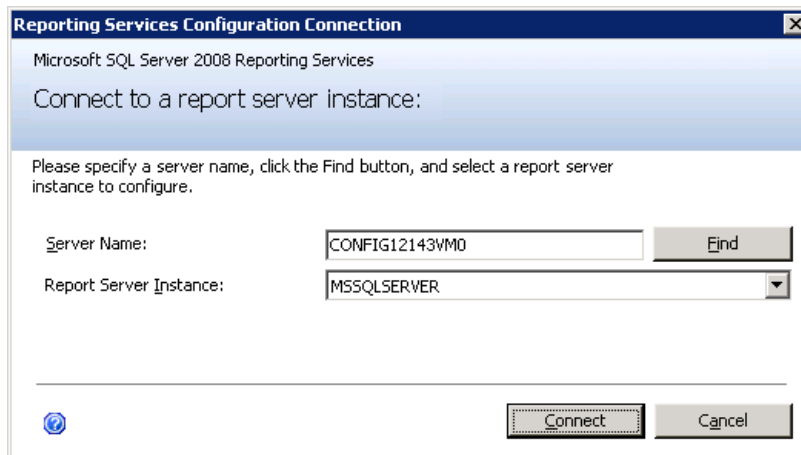
## Guidelines for Configuring SQL Server 2008 Reporting Services

You can use the default settings for SQL Server 2008 Reporting Services. Check the settings and if they are already set by default, do not try to reset them as an error will occur.

You must have IIS and ASP.NET installed before configuring SQL Server Reporting Services. For more information, see Guidelines for Installing IIS and ASP.NET on Windows Server 2008 and Windows Vista on page 26.

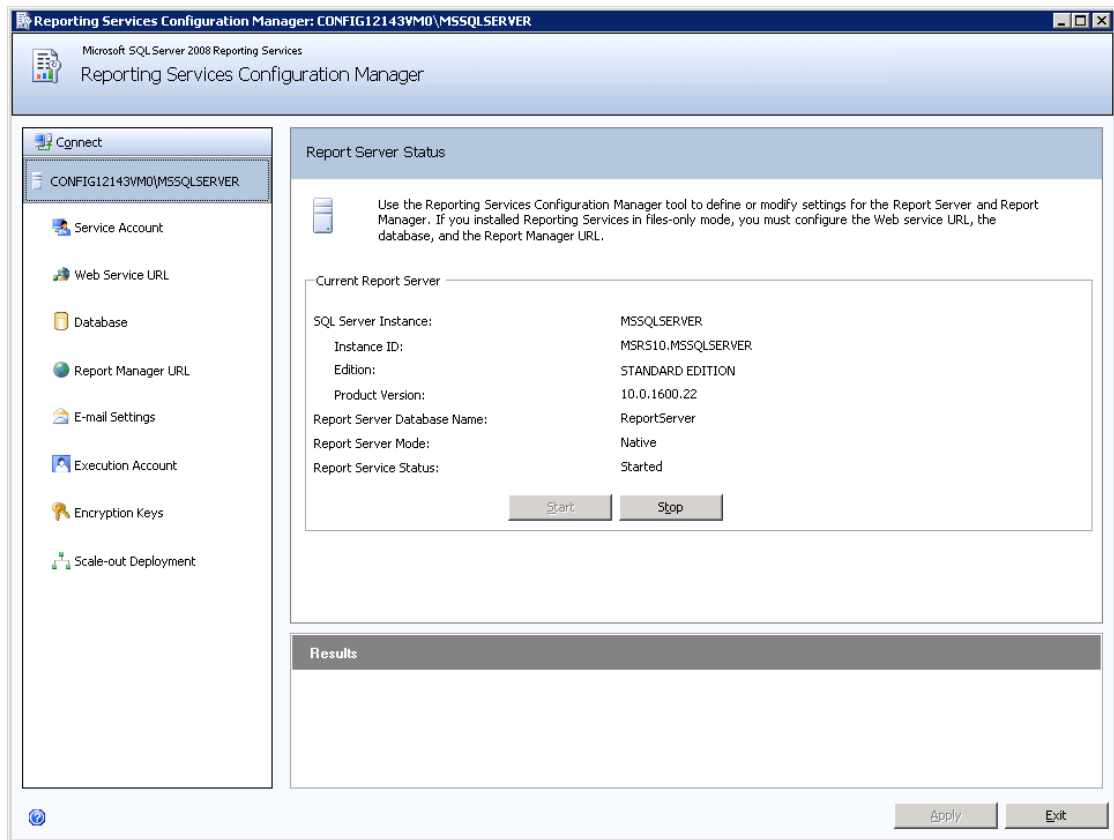
### To configure the SQL Server Reporting Services

- 1 On the Windows **Start** menu, point to **Programs, Microsoft SQL Server 2008, Configuration Tools**, and then click **Report Server Configuration Manager**. The **Reporting Services Configuration Connection** dialog box appears.



- 2 Configure the instance. Do the following:
  - a In the **Server Name** box, enter the name of the local report server node.
  - b In the **Report Server Instance** box, enter **MSSQLSERVER**.

- c Click **Connect**. After the connection has been established, the Report Server Status page appears. The Server Status appears as **Started**.



- 3 Make sure that the following components are configured with no errors:
  - **Service Account**
  - **Web Service URL**
  - **Database**
  - **Report Manager URL**
- 4 Click **Exit**.

## Guidelines for Configuring SQL Server 2005 Reporting Services on Windows Server 2008 or Windows Vista

You must enable ASP.NET and IIS before configuring SQL Server 2005 Reporting Services on Windows Server 2008 or Windows Vista. For more information, see Guidelines for Installing IIS and ASP.NET on Windows Server 2008 and Windows Vista on page 26.

### To install SQL Server 2005 Reporting Services

- 1 Verify that the World Wide Web Publishing service is started. If the World Wide Web Publishing service is not started, configure the service to start automatically by doing following:
  - a Click **System and Maintenance** in **Control Panel**.
  - b Click **Administrative Tools**.
  - c Double-click **Services**.
  - d Click **Continue** in the **User Account Control** dialog box.
  - e Right-click **World Wide Web Publishing Service** and then click **Properties**.
  - f In the **World Wide Web Publishing Service Properties** dialog box, click **Automatic** from the **Startup Type** list.
  - g Click **Apply**, click **Start**, and then click **OK**.
- 2 Install SQL Server 2005 or SQL Server 2005 Express Edition with Advanced Services SP3.

---

**Note** When you install the original release version of SQL Server 2005, a warning message shows that this program has known compatibility issues. Click **Run Program** to continue the installation.

---

- In the **Feature Selection** dialog box, make sure that Reporting Services is selected.
- In the **Report Server Installation Options** dialog box, select any one of the following options:
  - Install the default configuration**
  - Install but do not configure the server**



- 3 If you installed SQL Server 2005 Express Edition with Advanced Services SP2, skip to step 5 because SQL Server 2005 SP2 is already installed.
- 4 Install SQL Server 2005 SP3.
  - Make sure that the SQL Server service is running. The SQL Server service must be running to perform an authentication check during the SP3 installation.
  - After you finish with the **Authentication Mode** dialog box, you can stop the SQL Server service to avoid a system restart. To stop the SQL Server service, click **Administrative Tools** in Control Panel, double-click **Services**, right-click the **SQL Server service**, and then click **Stop**.
  - If the SQL Server 2005 User Provisioning Tool for Vista starts, start the SQL Server service before you grant administrative rights to a user. You can use the SQL Server 2005 User Provisioning Tool for Vista to add Windows user accounts to the SYSADMIN fixed server role easily.
- 5 Start the SQL Server service if the service is not started.
- 6 If you installed SQL Server Express Edition with Advanced Services SP2, reset IIS by doing the following:
  - a Open a command prompt by using the **Run as administrator** option.
  - b Type **IISRESET**, and then press **Enter**.
- 7 If you selected the **Install but do not configure the server** option in the **Report Server Installation Options** dialog box, configure the report server by doing the following:
  - a Start the Reporting Services Configuration tool. To start the tool, click **Start**, point to **All Programs**, point to **SQL Server 2005**, point to **Configuration Tools**, and then click **Reporting Services Configuration**.
  - b In the **User Account Control** dialog box, click **Continue**.
  - c In the **Report Server Installation Instance Selection** dialog box, type the name of the computer in the **Machine Name** box.
  - d Click the instance of SQL Server 2005 Reporting Services in the **Instance Name** list, and then click **Connect**.
  - e Configure the server for operation. Make sure that the application pool settings are correct. For more information, see IIS Application Pool Settings for Windows Vista on page 35.

- 8 Configure the report server for local administration. This allows you to start Internet Explorer and open either the local host or the network computer name of the server for both the Report Server application and the Report Manager application. Do the following:
  - a Start Windows Internet Explorer.
  - b On the **Tools** menu, click **Internet Options**.
  - c Click **Security**.
  - d Click **Trusted Sites**.
  - e Click **Sites**.
  - f Under **Add this Web site to the zone**, type **http://ServerName**. If you are not using HTTPS for the default site, clear the **Require server certification (https:) for all sites in this zone** check box.
  - g Click **Add**.
  - h Repeat steps f through g to add the **http://localhost** URL, and then click **Close**.
- 9 Create role assignments that explicitly grant you access together with full permissions. Do the following:
  - a Start Internet Explorer with the **Run as administrator** option. To do this click **Start**, click **All Programs**, right-click **Internet Explorer**, and then click **Run as administrator**.
  - b Open Report Manager.

By default, the Report Manager URL is:  
`http://ServerName/reports`

If you use SQL Server Express with Advanced Services SP2, the Report Manager URL is:  
`http://ServerName/reports$sqlexpress`

If you use a named instance of Reporting Services, the Report Manager URL is:  
`http://ServerName/reports$InstanceName`
  - c In the **Home** dialog box, click **Properties**.
  - d Click **New Role Assignment**.
  - e Type a Windows user account name in the following format: `<Domainname>\<Username>`.

- f Select the **Content Manager** check box.
  - g Click **OK**.
  - h In the **Home** dialog box, click **Site Settings**.
  - i Click **Configure site-wide security**.
  - j Click **New Role Assignment**.
  - k Type a Windows user account by using the following format: *Domain \ User*.
  - l Click **System Administrator**.
  - m Click **OK**.
  - n Close Report Manager.
- 10 Use Internet Explorer without the **Run as administrator** option to reopen Report Manager.

### IIS Application Pool Settings for Windows Vista

Reporting Services runs as a legacy application on IIS 7.0. If you configure the application pool for the Report Server virtual directory on a new Reporting Services installation, do one of the following:

- Select **Classic .NET AppPool** for the report server.

-OR-

- Create a new application pool. Then, set the **Managed Pipeline Mode** option to **Classic**.

If you installed Reporting Services by using the default configuration, the report server runs in its own application pool under the NetworkService account. If you use the default configuration, the report server is fully operational on Windows Vista. However, you should avoid running the report server in the default application pool on IIS 7.0. The default application pool has the **Managed Pipeline Mode** option set to **Integrated**. You will receive an "HTTP 500" error message if you run the report server in the default application pool.

## Guidelines for Installing and Uninstalling SharePoint Services

Microsoft Windows SharePoint Services 3.0 or later must be installed before you can install the MultiViews feature. SharePoint Services 3.0 is also known as SharePoint Services 2007.

After installing SharePoint Services, verify that the SQL Server Reporting Services home page appears.

Open your browser and enter one of the following:

- <http://localhost/reports>
- <http://yourservername/reports>

If the home page does not appear, exclude Reports and ReportServer from the SharePoint virtual directory using the SharePoint Administration web site.

Make sure that SharePoint allows applications to be created on the default site.

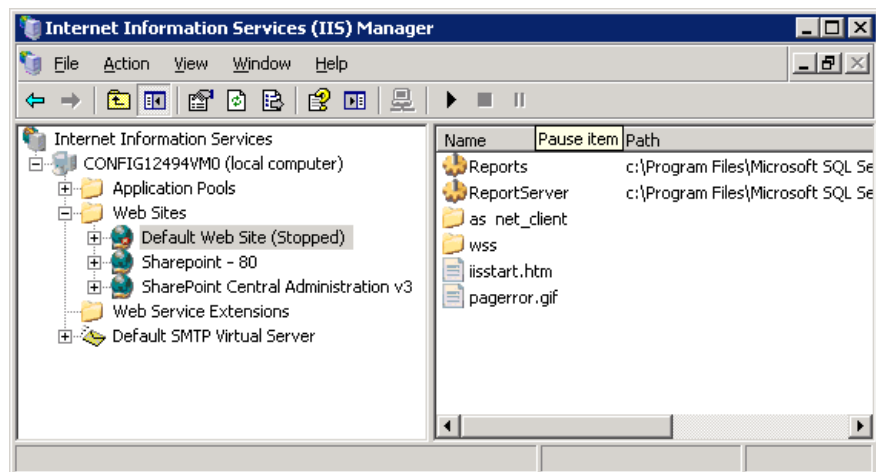
---

**Important** If you uninstall SharePoint Services 3.0, the default website is deleted, which will make the Wonderware Information Server portal inaccessible. Back up the portal before uninstalling SharePoint Services 3.0.

---

## Configuring Windows SharePoint Services 3.0

After you install Windows SharePoint Services 3.0, a default web site named "Sharepoint - 80" is created in IIS so that Sharepoint Services gets the default port of 80. The Default Web Site that is using port 80 is stopped.



You must delete the "Sharepoint - 80" web site that is using the default port.

**To delete the default web site**

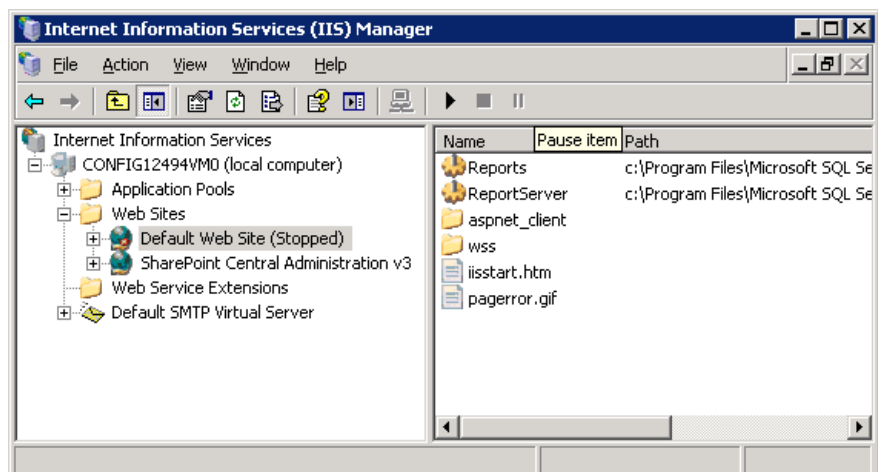
- 1 On the Windows **Start** menu, point to **Programs**, point to **Administrative Tools**, and then click **SharePoint 3.0 Central Administration**. The web site appears.
- 2 Click the **Application Management** tab.
- 3 Under **SharePoint Web Application Management**, click **Delete Web Application**. The **Delete Web Application** page appears.
- 4 Do the following:
  - a In the **Web Application** list, click **Change Web Application**. The **Select Web Application** page appears.
  - b Select the Windows SharePoint Services 3.0 default Web site "SharePoint - 80" (<http://ServerName>).

---

**Note** Make sure that you delete the default web site: <http://ServerName:80>

---

- c Under **Delete content databases**, click **Yes**.
  - d Under **Delete IIS Web sites**, click **Yes**.
  - e Click **Delete**. When a warning message box appears, click **OK**.
- 5 Wait for the **Application Management** tab to appear, and then close the Windows SharePoint Services Central Administration site.
- 6 Open Internet Information Services (IIS) Manager and check that the "Sharepoint - 80" default website created by Sharepoint has been deleted.



- 7 Right-click **Default Web Site** and then click **Start** to start the services.

To run Sharepoint Services 3.0, you must create a new website.

#### To create a new web site and site collection

- 1 On the Windows **Start** menu, point to **All Programs**, point to **Administrative Tools**, and then click **SharePoint 3.0 Central Administration**.
- 2 Click the **Application Management** tab.
- 3 Under **SharePoint Web Application Management**, click **Create or extend web application**. The **Create or Extend Web Application** page appears.
- 4 Create a new web application. Do the following:
  - a Click **Create a new Web application**. The **Create New Web Application** page appears.
  - a In the **IIS Web Site** section, click **Use an Existing IIS Web site** and make sure that **Default web site** is selected in the list.
  - b In the **Application Pool** section, click **Predefined** and make sure that **Network Service** is selected as the security account for the application pool.
  - c In the **Database Name and Authentication** section, make sure that **Windows authentication** is selected.
  - d Click **OK** and wait while your changes are processed. The **Application Management** page appears.
- 5 In the **Application Management** page, click on **Create Site Collection**. The **Create Site Collection** page appears.
- 6 Do the following:
  - a In the **Web Application** section, click **Change Web Application** in the **Web Application** list. The **Select Web Application** page appears.
  - b Select the new web application that you created in step 4.
  - c In the **Title** and **Description** section, type the title and description.
  - d In the **Template** section, click **Blank Site**.
  - e In the **Primary Site Collection Administrator** section, specify the user name of the person administering this site (for example, svadmin1).
  - f Click **OK** and wait while your changes are processed. The **Top Level Site Successfully Created** page appears.
  - g Click **OK** button.
- 7 Make sure that you can access the web site.

## Installing SQLXML for HTTP Access to Data Sources

If you want to access data sources over HTTP, you must install SQLXML on the Wonderware Information Server computer.

When you use the installation Configurator utility to set up an initial data source, you select to use HTTP access and then provide a name for the virtual directory. The Configurator utility takes care of setting up the virtual directory for you and configuring the HTTP access.

### To install SQLXML software

- 1 Locate the \SQLXML folder on the Wonderware Information Server installation CD.
- 2 Run the SQLXML.msi file.

## Installing Language Packs for Multilingual Systems

If you want to use Wonderware Information Server on a multilingual system, you must manually install the Microsoft .NET language packs for any language that is in addition to the default language of the system. Wonderware Information Server supports French, German, Chinese, and Japanese. You can download the language packs from the Microsoft website.





# Chapter 3

## Installing and Configuring Wonderware Information Server

Wonderware Information Server consists of a set of services, a COM+ package of components, and a customizable web server of ASP and HTML pages.

You do not need to be familiar with web building software to set up Wonderware Information Server. The Wonderware Information Server installation program and Configurator utility builds and configures the entire web server for you.

You use the Wonderware Information Server installation program to copy the required resources, such as files, from the setup CD to the target computer.

You then use the Configurator utility to finish the setup.

For information on installing or upgrading the Win-XML Exporter, see the *Wonderware Information Server Win-XML Exporter Guide*. For information on installing the ArcestrA Web Exporter, see the *ArcestrA Web Exporter Guide*.

## Installable Features

You can select from the following features during the Wonderware Information Server install:

- **Information Server.** Consists of core Wonderware Information Server system, which manages security, licensing, data sources, process graphics, factory alarms, customizing the portal, access panels, and Table Weaver contents.
- **MultiViews.** Supports SharePoint Web Part Pages that can combine several distinct types of information together in the same web page, which is arranged in a specific layout.
- **ActiveFactory Reporting.** Allows you to generate reports from published ActiveFactory workbooks and trends using data from the Wonderware Historian.
- **ArchestrA Reporting.** Provides infrastructure and tools that extend SQL Server Reporting Services to better support report development and deployment.
- **Sample Content.** Includes sample configurations and reports to show the system's capabilities and accelerate application development. The sample content includes a process graphics demo, a SmartSymbol display, content unit samples, and ArchestrA report samples. You must configure valid alarm and Wonderware Historian data sources to use the sample content.
- **ArchestrA License Server.** Provides support for licensing infrastructure on the Wonderware Information Server computer. An alternative is not to install this feature and use the License Server from a network location. You use the ArchestrA License Manager to set up a license server for Wonderware Information Server. For more information, see the ArchestrA License Manager documentation.

## Installation Pre-Requisites

The installation program checks for the following basic system pre-requisites:

- One of the required operating systems. For more information, see Operating System Requirements on page 13.
- Microsoft .NET Framework 3.5 SP1. If this is not found, the installation program installs it.
- A file system partitioned with NTFS.
- You are a member of the local computer's administrator group.
- Internet Information Services (IIS) version 6.0 or 7.0 is installed. If IIS is not installed, you must install it yourself. For more information, see Guidelines for Installing Microsoft Internet Information Services (IIS) and ASP.NET on page 25.

All other product pre-requisites are part of configuration and are not checked during the Wonderware Information Server install. For example, the installation does not check for:

- Windows SharePoint Services, if you select the MultiViews feature during installation.
- Microsoft Excel, if you select the ActiveFactory Reporting Website feature during installation.
- SQL Server Reporting Services, if you select the ArchestrA Reporting feature during installation.

## Installing Wonderware Information Server

You must be a member of the local computer's administrator group to install Wonderware Information Server.

The person who logs onto the computer as administrator and installs Wonderware Information Server is designated as the first administrator for the Wonderware Information Server. This person is the only one who has access to the administrative pages inside Wonderware Information Server and is responsible for adding additional users to roles, assigning access privileges, customizing the product, configuring data sources, and deploying the licenses.

As administrator, you must know the names and passwords for the Wonderware Historian and InTouch Alarm System databases from which Wonderware Information Server retrieves data.

If you are using the Windows Vista 64-bit operating system, either with or without UAC enabled, disable any antivirus scanners before you start the installation. You can enable them again when the Wonderware Information Server installation and configuration is complete.

---

**WARNING!** If you currently have ActiveFactory 9.0/9.1 Reporting Web Services on your system, do not uninstall it. The Wonderware Information Server installation program uses this for migrating ActiveFactory 9.0/9.1 reports to the ActiveFactory Reporting Web Services in Wonderware Information Server. If you uninstall ActiveFactory 9.0/9.1 Reporting Web Services before installing Wonderware Information Server, it will not migrate and you lose all your ActiveFactory 9.0/9.1 reports!

---

### To install the Wonderware Information Server files

- 1 Insert the Wonderware Information Server 4.0 CD into your CD-ROM drive. The **Welcome** dialog box appears.
- 2 Click **Next**. The **License Agreement** dialog box appears.
- 3 Read the license agreement and then click **I accept the License Agreement**.
- 4 Click **Next**. If the software pre-requisites are already installed, the feature list dialog box appears.

- 5 Select the Wonderware Information Server features to install. The default is to install all features on the hard disk. The path must be a valid path to which the currently logged in user has write permissions.
- 6 Optionally browse to select a different destination folder for the source files.
- 7 Click **Next**. The **Ready to Install the Application** dialog box appears.
- 8 To install the software with the options you've selected, click **Install**. The **Updating the system** dialog box appears. The installation program installs the software on the computer. This may take a few minutes.
- 9 When the installation is done, the final installation dialog box appears. Click **Configure** to continue with the configuration steps required for Wonderware Information Server. For more information, see About Wonderware Information Server Configuration on page 46.

---

**Important** If you exit the installation program without clicking **Configure**, required files, such as the ActiveFactory language packs, are not installed. To install ActiveFactory language packs, run the Wonderware Information Server installation program, select to modify the install, and then remove the ActiveFactory Reporting Website feature. Then run the installation program again and add the ActiveFactory Reporting Website feature. The language packs will be installed.

---

## About Wonderware Information Server Configuration

You use the Configurator to set up the product, such as creating the databases and configuring the pre-requisite software. The Configurator provides detailed feedback on the status of the configuration process.

If you make changes to your operating environment, you can use the Configurator to re-configure Wonderware Information Server. However, always use the Wonderware Information Server portal to make changes to portal configuration. For example, if you want to change the settings for a Historian data source, use the Data Source Manager within the portal, not the Configurator utility.

### Windows Firewall Exceptions

You can leave the Windows firewall on during configuration. The Configurator makes the appropriate firewall exceptions for TCP Port 1433 and Port 80. However, you may need to manually adjust the Windows firewall settings for the following scenarios:

- If you are using a remote SQL Server, you must enable “File and Printer Sharing” in the Windows firewall configuration to permit the Wonderware Information Server Backup and Restore utility to work.
- If you are using a remote SQL Server, Port 1433 and port 80 must be open in the Windows firewall on the remote node to access the Reporting Service web pages.
- If the TCP Port on the local computer is configured to use a port other than Port 1433, you must manually add this other port to the Windows firewall exceptions list.

## Using Windows Authentication with Microsoft SQL Server 2008

If you are using Microsoft SQL Server 2008 and want to use Windows authentication, you must add the BUILTIN\Administrators security group to the sysadmin server role before you use the Configurator utility.

### To add the security group

- 1 Execute the SYS.SP\_GrantLogin stored procedure as follows:

```
EXEC SYS.SP_GrantLogin  
'BUILTIN\Administrators'
```

- 2 Open the "BUILTIN\Administrators" login properties and add it to the sysadmin security role.

## Configuring the Wonderware Information Server

Before you start the configuration, be sure that:

- You know the administrative login for the Microsoft SQL Server you are using.
- During the Wonderware Information Server configuration, no one accesses the web server, or any of its services, using a browser. The Configurator needs to be able to shut down services appropriately.

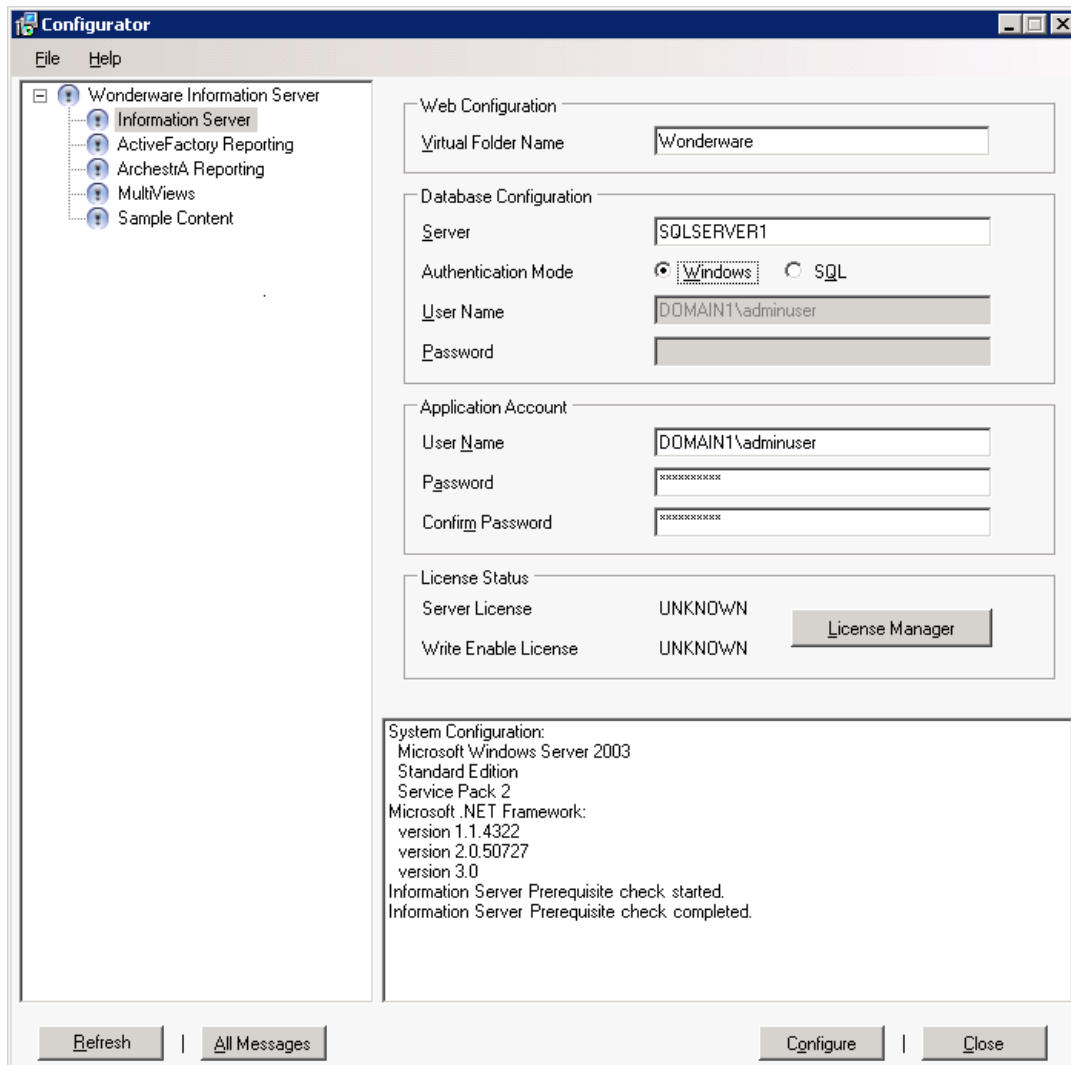
The SQL Server services must be configured to execute using a network account.

## Starting the Configurator Utility

You can start the Configurator utility at the end of the installation program. If Wonderware Information Server is already installed, you can start the utility from the Windows **Start** menu.

### To start the Configurator utility

- 1 On the **Start** menu on the Windows Taskbar, point to **Programs, Wonderware**, then to **Common**, and then select **Configurator**. The Configurator main window appears.
- 2 In the left pane, expand **Wonderware Information Server**. A list of Wonderware Information Server features appears. The icon to the left of the feature name shows the feature's configuration status.





When you click a feature name, configuration options appear in the right pane.

Status and error messages appear in the window in the bottom right of the dialog box. For more information about a message, including possible actions you need to take, simply double-click the message text in the window.

- 3 Click on each installed feature and configure the options.
  - For more information on configuring Information Server, see *Configuring the Core Wonderware Information Server* on page 49.
  - For more information on configuring ActiveFactory Reporting, see *Configuring ActiveFactory Reporting* on page 52.
  - For more information on configuring ArcestrA Reporting, see *Configuring ArcestrA Reporting* on page 55.
  - For more information on configuring MultiViews, see *Configuring MultiViews* on page 58.
  - For more information on configuring sample content, see *Configuring Sample Content* on page 59.
- 4 When you are done, click **Close**.

## Configuring the Core Wonderware Information Server

The Configurator checks for the following pre-requisites before configuring the core Wonderware Information Server:

- A supported operating system is installed.
- A supported version of IIS is installed.
- ASP.NET 2.0 or later is enabled
- SQL Server Client Components are installed on the local computer
- A supported version of SQL Server is installed.

The Configurator:

- For IIS, creates the required virtual directories, configures web server extensions, disables the static file cache, and creates the appropriate application pools.
- Creates the SuiteVoyager database in SQL Server. The SuiteVoyager database is the administration and configuration database for Wonderware Information Server.

- Creates login IDs used exclusively by the Wonderware Information Server software to access the SuiteVoyager database: svAdmin, svSysAdmin, svSuper and svUser.
- Sets up Windows registry entries.
- Creates the required exceptions in the Windows firewall on the local computer.
- Creates and configures COM+ files and packages.
- Configures the Wonderware Information Server Alarm Consumer, Wonderware License Manager and RDBHandler services.
- Excludes the appropriate virtual directories for SharePoint.

### To configure the core Wonderware Information Server

- 1 Open the Configurator utility.
- 2 In the left pane, click **Information Server**. The configuration options appear in the right pane.

The screenshot shows the configuration utility with the following sections and fields:

- Web Configuration:**
  - Virtual Folder Name: w/onderware
- Database Configuration:**
  - Server: SQLSERVER1
  - Authentication Mode:  Windows  SQL
  - User Name: DOMAIN1\adminuser
  - Password: [Redacted]
- Application Account:**
  - User Name: DOMAIN1\adminuser
  - Password: [Redacted]
  - Confirm Password: [Redacted]
- License Status:**
  - Server License: UNKNOWN
  - Write Enable License: UNKNOWN
  - License Manager: [Button]

- 3 In the **Virtual Folder Name** box, type the virtual folder name. The virtual folder name is the address you enter in Internet Explorer to access Wonderware Information Server. The virtual folder name is case-insensitive, can be any characters other than /, \*, ?, and \. The maximum length is 240 characters. For example, if you specified MyInfoServer, run-time users would type `http://<computername>\MyInfoServer` to access Wonderware Information Server.

- 4 In the **Database Configuration** area, specify the SQL Server host on which you want to create the Wonderware Information Server database that is used to store administration and configuration information. Do the following:
  - a In the **Server** box, type the name of the SQL Server host.
  - b Select the authentication mode you want to use. Click **Windows** to log on to SQL Server using your current Windows login account, or click **SQL** and type your SQL Server username and password. The account you specify must be an administrative SQL Server account.

---

**Note** This account information is only used by the installation to create the administration database. It is not stored on the computer in any way or used by the Wonderware Information Server at any later time.

---

- 5 In the **Application Account** area, type the user account information used by portal components to log on and run as Windows services. The account you specify must have sufficient rights on the domain to retrieve a list of domain users. Otherwise, domain users do not appear in the User Manager page of Wonderware Information Server.
- 6 In the **License Status** area, verify the licensing status. If no valid license is found, click **License Manager** to install the license. For more information, see *Installing the Product License* on page 64.
- 7 Click **Configure**. A green check appears in the left pane when Wonderware Information Server is successfully configured.

## Configuring ActiveFactory Reporting

The Configurator checks for the following pre-requisite before configuring ActiveFactory Reporting:

- Microsoft Excel 2003 or later

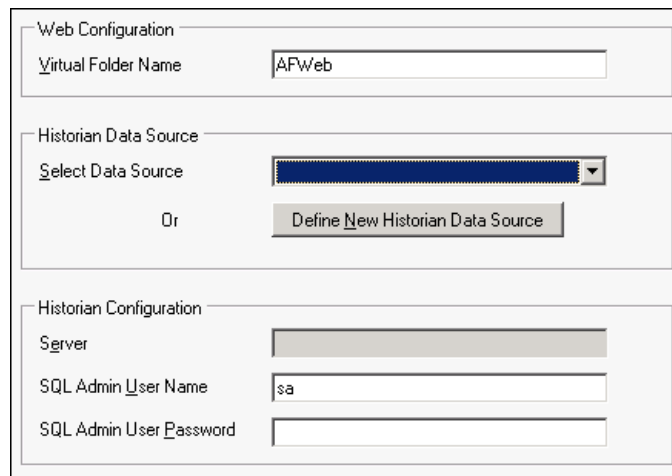
The Configurator:

- Creates and configures the ActiveFactory Reporting WebSite virtual directory.
- Excludes the virtual directory from SharePoint.
- Configures the Wonderware Historian database to support ActiveFactory Reporting.
- Generates and configures various ActiveFactory Reporting support files (.xml, .xsl, and so on).
- Configures the Windows service for reporting.

Be sure that Microsoft Excel is not running while you configure ActiveFactory Reporting.

### To configure ActiveFactory Reporting

- 1 Open the Configurator utility.
- 2 In the left pane, click **ActiveFactory Reporting**. The configuration options appear in the right pane.



The screenshot shows the configuration interface for ActiveFactory Reporting. It is organized into three main sections:

- Web Configuration:** Contains a text box for 'Virtual Folder Name' with the value 'AFWeb' entered.
- Historian Data Source:** Features a dropdown menu labeled 'Select Data Source' and a button labeled 'Define New Historian Data Source'.
- Historian Configuration:** Contains three text boxes: 'Server' (empty), 'SQL Admin User Name' (containing 'sa'), and 'SQL Admin User Password' (empty).

The pre-requisites are checked.

- 3 In the **Virtual Folder Name** box, type the report web site name.

- 4 In the **Historian Data Source** area, specify the name of the Wonderware Historian to use as the source of report data. You can either select an existing data source from the list or click **Define New Historian Data Source** to define a new one. For more information, see *Defining a New Historian Data Source* on page 53.

ActiveFactory Reporting does not support a data source that uses Windows authentication.

- 5 In the **Historian Configuration** area, provide an administrative SQL Server account that the Configurator will use to log on to the Wonderware Historian and configure the database to support ActiveFactory Reporting.
- 6 Click **Configure**. A green check appears in the left pane when ActiveFactory Reporting is successfully configured.

## Defining a New Historian Data Source

You can define a new Historian data source using the Configurator.

If you want to configure a data source to use Windows authentication, you must set up delegation between the middle server and the back end Historian server. This is done on the domain controller. For more information, see <http://msdn2.microsoft.com/en-us/library/ms189580.aspx>.

### To define a new Historian data source

- 1 In the configuration pane, click **Define New Historian Data Source**. The **New Historian DataSource Form** page appears.

The screenshot shows a dialog box titled "New Historian DataSource Form". It contains a "Data Source Details" section with the following fields and values:

- Data Source Name: Historian1
- Database Server Name: MyHistorian
- Database Name: Runtime
- Integrated Security:
- Historian User Name: (empty)
- Historian User Password: (empty)
- Connection Timeout: 0
- Query Timeout: 0
- Provider: SQLNCLI
- Has HTTP mode:
- URL Connection: (empty)

At the bottom of the dialog are "OK" and "Cancel" buttons.

- 2 Specify the Historian data source. Do the following:
  - a In the **Data Source Name** box, type name of the Wonderware Historian as you would like it to appear for Wonderware Information Server users.
  - b In the **Database Server Name** box, type the name of the Wonderware Historian.
  - c In the **Database Name** box, type `Runtime`.
- 3 Configure the account used to connect to the Historian. Do any of the following:
  - To use Windows authentication, select the **Integrated Security** check box.
  - To use SQL Server authentication, provide the user name and password in the **Historian User Name** and **Historian User Password** boxes.
- 4 Configure the data source timeouts. Do the following:
  - a In the **Connection Timeout** box, type the time, in seconds, that Wonderware Information Server should wait for the connection to the Historian to be established, before returning an error message.
  - b In the **Query Timeout** box, type the time, in seconds, that the Wonderware Information Server should wait for the results of a database query to the Historian to be returned, before returning an error message.
- 5 In the **Provider** box, type the provider name for SQL Server. For SQL Server 2005, type `SQLNCLI`. For SQL Server 2008, type `SQLNCLI10`.
- 6 If you want to access the Historian using HTTP instead of TCP/IP, do the following:
  - a Select the **Has HTTP mode** check box.
  - b In the **URL Connection** box, type the web service URL.
- 7 Click **OK**.

## Configuring ArcestrA Reporting

The Configurator checks for the following pre-requisite before configuring ArcestrA Reporting:

- SQL Server Reporting Services is configured and working on the local computer

The Configurator:

- For IIS, creates and configures the ArcestrAReports virtual directory and sets up folder security.
- Creates and configures the aaReports database in SQL Server.
- Creates Windows security groups. The aaReportsUser login ID is also created.
- Creates any necessary Windows registry keys.
- Configures the aaReports data source for Wonderware Information Server.
- Creates the ArcestrA Reports folder under the root of the SQL Server Reporting Services web site.
- Deploys sample history and alarm reports.

### To configure ArcestrA Reporting

- 1 Open the Configurator utility.
- 2 In the left pane, click **ArcestrA Reporting**. The configuration options appear in the right pane.

The screenshot shows a configuration window with two sections. The top section is titled "Historian Data Source for Sample Reports" and contains a "Select Data Source" dropdown menu, the text "Or", and a button labeled "Define New Historian Data Source". The bottom section is titled "Alarm Data Source for Sample Reports" and contains a "Select Data Source" dropdown menu, the text "Or", and a button labeled "Define New Alarm Data Source".

The pre-requisites are checked.

- 3 Select the **Deploy Sample Reports** to use the sample reports with a historian or alarm data source. If you do not select his check box, you can use ArcestrA Reporting for products that do not use a historian or alarm data source, such as the InBatch software.

- 4 In the **Historian Data Source for Sample Reports** area, specify the name of the data source for the report data. You can either select an existing data source from the list or click **Define New Historian Data Source** to define a new one. For more information, see *Defining a New Historian Data Source* on page 53.
- 5 In the **Alarm Data Source for Sample Reports** area, specify the name of the InTouch alarm database to use as the source of alarm data. You can either select an existing data source from the list or click **Define New Alarm Data Source** to define a new one. For more information, see *Defining a New Alarm Data Source* on page 56.
- 6 Click **Configure**. A green check appears in the left pane when ArchestrA Reporting is successfully configured.

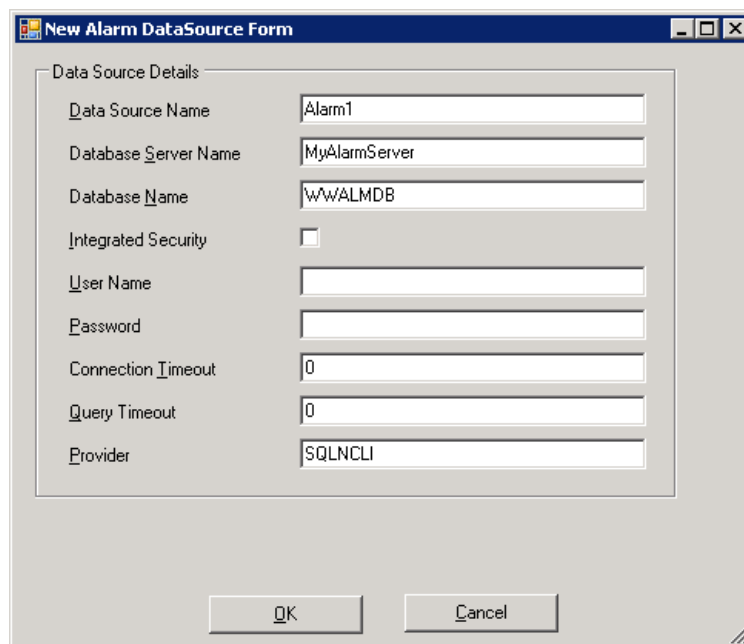
## Defining a New Alarm Data Source

You can define a new alarm data source using the Configurator.

If you want to configure a data source to use Windows authentication, you must set up delegation between the middle server and the back end alarm server. This is done on the domain controller. For more information, see <http://msdn2.microsoft.com/en-us/library/ms189580.aspx>.

### To define a new alarm data source

- 1 In the configuration pane, click **Define New Alarm Data Source**. The **New Alarm DataSource Form** page appears.



The screenshot shows a dialog box titled "New Alarm DataSource Form". It contains a "Data Source Details" section with the following fields and values:

Field	Value
Data Source Name	Alarm1
Database Server Name	MyAlarmServer
Database Name	wWALMDB
Integrated Security	<input type="checkbox"/>
User Name	
Password	
Connection Timeout	0
Query Timeout	0
Provider	SQLNCLI

At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".



- 2 Specify the alarm data source. Do the following:
  - a In the **Data Source Type** list, click **Alarm**.
  - b In the **Data Source Name** list, type name of the alarm data source as you would like it to appear for Wonderware Information Server users.
  - c In the **Description** box, type a description for the data source that is shown to Wonderware Information Server users.
  - d In the **ServerName** box, type the name of the computer that hosts the alarm database.
  - e In the **Database** box, type `WWALMDB`.
- 3 Configure the account used to connect to the alarm database. Do any of the following:
  - To use Windows authentication, select the **Integrated Security** check box.
  - To use SQL Server authentication, provide the user name and password in the **User Name** and **Password** boxes.
- 4 Select the **Default for this Data Source type** check box to make this defined data source the default alarm data source used by ArchestrA Reports.
- 5 Configure the data source timeouts. Do the following:
  - a In the **Connection Timeout** box, type the time, in seconds, that Wonderware Information Server should wait for the connection to the alarm database to be established, before returning an error message.
  - b In the **Query Timeout** box, type the time, in seconds, that the Wonderware Information Server should wait for the results of an alarm query to be returned, before returning an error message.
- 6 In the **Provider** box, type the provider name for SQL Server. For SQL Server 2005, type `SQLNCLI`. For SQL Server 2008, type `SQLNCLI10`.
- 7 Click **OK**.

## Configuring MultiViews

The Configurator checks for the following pre-requisite before configuring MultiViews:

- A supported version of SharePoint is installed

The Configurator:

- Includes MultiViews navigation in the hierarchy.
- Deploys Web Parts.
- Creates sites and document libraries.

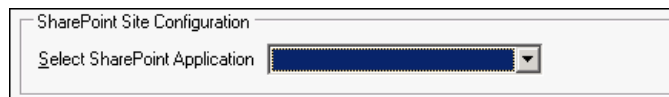
---

**Note** The Multiviews feature is not supported on the 32-bit version of Windows Vista and the 64-bit versions of Windows Server 2008 and Windows Vista.

---

### To configure MultiViews

- 1 Open the Configurator utility.
- 2 In the left pane, click **MultiViews**. The configuration option appears in the right pane.



The pre-requisites are checked.

- 3 In the **Select SharePoint Application** list, click the name of the SharePoint application to use for MultiViews.
- 4 Click **Configure**. A green check appears in the left pane when MultiViews is successfully configured.

## Configuring Sample Content

For the Process Graphics sample to update the live data, you must run InTouch WindowViewer on the Wonderware Information Server computer.

For the Trend Content Units to work, ActiveFactory Reporting feature must be installed and configured.

The Configurator:

- Creates the FactorySuiteSample database in SQL Server.
- Creates and configures Wonderware Information Server data sources for the samples.
- Creates and configures the sample, such as the InTouch applications, TableWeaver content units, Symbol Weaver content, and so on.

### To configure sample content

- 1 Open the Configurator utility.
- 2 In the left pane, click **Sample Content**. There are no configuration options.
- 3 Click **Configure**. A green check appears in the left pane when the sample content is successfully configured.

## Re-Installing Wonderware Information Server

You can modify or repair an Wonderware Information Server installation.

### Modifying Wonderware Information Server

When you modify the Wonderware Information Server installation, you add new features or remove existing features.

If you add a feature, the condition of all pre-requisite software is checked. If the checks pass, all the resources associated with that feature are copied to the Wonderware Information Server computer. You then use the Configurator to configure the feature.

If you remove a feature, all the configuration for that feature is returned to the original state.

#### To modify Wonderware Information Server

- 1 Run the Wonderware Information Server installation program. The **Wonderware Information Server** wizard appears.
- 2 Click **Modify**.
- 3 Click **Next**. The feature list dialog box appears.
- 4 Select the appropriate check boxes to add or remove features.
- 5 Click **Next** and follow the prompts to complete the modification.

### Repairing Wonderware Information Server

If you repair the Wonderware Information Server, any files that were part of the original installation are replaced if they are corrupt.

The configuration for any of the features is not changed. To change the configuration, you need to use the Configurator utility.

#### To repair Wonderware Information Server

- 1 Run the Wonderware Information Server installation program. The **Wonderware Information Server** wizard appears.
- 2 Click **Repair**.
- 3 Click **Next** and follow the prompts to complete the repair.

## Uninstalling Wonderware Information Server

If you uninstall Wonderware Information Server, the entire product is removed, including feature-related files and folders, COM+ packages, ASP files, and so on. However, the uninstall does not remove any user-created content, such as the user database, process graphics, content units, report files, and so on.

You use the standard Windows Add/Remove Programs feature from the Control Panel to remove the Wonderware Information Server.

Uninstalling Wonderware Information Server does not require you to restart the computer after the uninstall is complete.

After you uninstall Wonderware Information Server, use the Windows Add/Remove Programs feature to uninstall each language pack. Language packs are named **Wonderware ActiveFactory <lang> Language**, where <lang> is French, German, Japanese, or Simplified Chinese.

You should not uninstall language packs if either Wonderware Information Server or ActiveFactory are still installed on the computer.

## Upgrading from a Previous Version

You can upgrade the following versions to Wonderware Information Server 4.0:

- Wonderware SuiteVoyager 3.0, including any patches and Service Packs
- Wonderware Information Server 3.1, including any patches and Service Packs

The upgrade program automatically backs up the product files, configuration, and user content before the upgrade occurs.

After the upgrade is completed each feature has to be configured using the Configurator tool. Features that are not configured will not be available until the configuration is completed.

The following table provides a summary of the upgrade support

Base release	Upgrade Support
ActiveFactory Reporting Website 8.5 or earlier only	Not supported. You must upgrade the ActiveFactory Reporting WebSite to version 9.0/9.1 first if you want to migrate your existing reports.
ActiveFactory Reporting Website 9.0 or 9.1	Direct upgrade to Wonderware Information Server 4.0.
Wonderware Information Server 3.0 or 3.1 (all combinations of features)	Direct upgrade

If you are upgrading from Wonderware Information Server 3.1 to Wonderware Information Server 4.0, all of the features that you currently have installed are selected by default in the feature selection dialog box and the feature tree is unavailable. If you want to install additional features, you must run the setup program again after the upgrade and select to modify the installation.

When you upgrade from Wonderware Information Server 3.0 to Wonderware Information Server 4.0, if any optional feature is already installed, the feature selection for that feature will be unavailable. Features that were not installed in Wonderware Information Server 3.0 will be available for you to select to install as part of the upgrade.

For example, if the Multiview feature was previously installed for Wonderware Information Server 3.0, but other features such as ActiveFactory Reporting and ArcestrA Reporting were not installed, then you cannot change the Multiview feature selection during the upgrade. However, you can select additional features to install, such as ActiveFactory Reporting and ArcestrA Reporting.

Existing ArcestrA Reports and sample content are migrated to Wonderware Information Server 4.0.

For detailed information on upgrading ActiveFactory components, see *Upgrading ActiveFactory Components* on page 63.

For information on installing or upgrading the Win-XML Exporter, see the *Wonderware Information Server Win-XML Exporter Guide*. For information on installing the ArcestrA Web Exporter, see the *ArcestrA Web Exporter Guide*.

## Upgrading ActiveFactory Components

The ActiveFactory Reporting WebSite 8.5 Migration Utility is not supported by Wonderware Information Server 4.0. You cannot upgrade directly from the ActiveFactory 8.5 Reporting WebSite to Wonderware Information Server 4.0.

If you are using the ActiveFactory 8.5 Reporting WebSite with SuiteVoyager 2.6, you must manually uninstall it before you install Wonderware Information Server 4.0. If you want to migrate the ActiveFactory 8.5 reports, you must first upgrade to the ActiveFactory 9.0/9.1 Reporting WebSite and then upgrade from ActiveFactory 9.0/9.1 Reporting WebSite to Wonderware Information Server 4.0.

If you are using the ActiveFactory 9.0 or 9.1 Reporting WebSite, the Wonderware Information Server upgrade program upgrades the ActiveFactory Reporting to the current version.

---

**WARNING!** Leave ActiveFactory 9.0/9.1 Reporting Web Services on your system. The Wonderware Information Server installation program uses this for migrating ActiveFactory 9.0/9.1 reports to the ActiveFactory Reporting Web Services in Wonderware Information Server. If you uninstall ActiveFactory 9.0/9.1 Reporting Web Services before installing Wonderware Information Server, it will not migrate and you lose all your ActiveFactory 9.0/9.1 reports!

---

If the ActiveFactory desktop applications (any version) are installed on the Wonderware Information Server computer, you must manually uninstall them before upgrading Wonderware Information Server.

## Upgrading the Server from Wonderware Information Server 3.0 or 3.1

If the ActiveFactory desktop applications are installed on the Wonderware Information Server computer, you must manually uninstall them before upgrading Wonderware Information Server.

### To upgrade the server from Wonderware Information Server 3.0 or 3.1

- 1 Insert the Wonderware Information Server 4.0 Server CD into your CD-ROM drive. When the installation detects the correct previous version, you may be prompted to remove prior version components before continuing.
- 2 Follow the prompts to complete the upgrade.

## Installing the Product License

Wonderware Information Server requires you to set up a license server using the ArcestrA License Manager. The license server can be set up on the same computer as the Wonderware Information Server software or on a different computer.

For information on licensing and how to install licenses, including how to read license files and set up license servers, see the ArcestrA License Manager Guide and the online help. For additional information about specific licensing issues for Wonderware Information Server, see the Wonderware Information Server Administration Guide.

### To start the ArcestrA License Manager

- ◆ On the **Start** menu on the Windows Taskbar, point to **Programs, Wonderware**, then to **Common**, and then select **ArcestrA License Manager**. The ArcestrA License Manager main window appears.



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