Tech Note 476 Installing Wonderware® Information Server 3.0

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Introduction

This Tech Note provides the key steps for a basic installation of Wonderware Information Server (WIS) 3.0 and and its licensing.

Other installation options provided in the Wonderware Information Server documentation, specifically **Installing Wonderware Information Server** in the *Wonderware Information Server Administration Guide* and the Wonderware Information Server 3.0 Readme. Both documents are available on the Wonderware Information Server 3.0 CD. Please read these documents first to become familiar with the documentation as well as the requirements and prerequisites.

Complete the basic installation steps in the following order:

- 1. Start with a clean Windows® 2003 Server SP1 or Windows 2003 R2 node. Both operating systems are supported.
- 2. Install Internet Information Services and ASP.NET.
- 3. Install Microsoft® SQL Server 2005 including Reporting Services.
- 4. Install SQL Server 2005 SP1.
- 5. Verify the Reporting Services Configuration.
- 6. Install SharePoint Services 2.0 with SP2.
- 7. Check the SQL Server Reporting Services Home Page.
- 8. If it does not open, then use SharePoint Central Administration to exclude paths.
- 9. Install WIS 3.0.
- 10. Install the License Server and the licenses.

Note: Installing SharePoint Services before installing SQL Server 2005 is also a valid installation order.

The following sections provide details of the above steps. Screen shots are provided for necessary key configuration options.

Start with a Clean Windows 2003 Server SP1 or Windows 2003 R2

Windows 2003 Server SP1 is a supported platform for Wonderware Information Server 3.0, even though it is not listed in the original WIS 3.0 documentation.

After installing Windows 2003 Server, install Internet Information Services (IIS) and ASP .NET.

- 1. Open the Control Panel and click Add-Remove Windows Components.
- 2. Select the Component Application Server.
- 3. Click the Details button. Check ASP.NET and Internet Information Services (IIS) as shown in Figure 1 (below).



Figure 1: Application Server Details

- 4. Highlight Internet Information Services (IIS) and click the Details button.
- 5. Uncheck FrontPage 2002 Server Extensions and check the following Subcomponents of Internet Information Services:
 - Common Files
 - Internet Information Services Manager
 - SMTP Service (this is a listed requirement for Sharepoint Services 2.0 SP2, but WIS 3.0 will work without this option installed)
 - World Wide Web Service

A partial list is shown in Figure 2 (below):

Internet Information Services (IIS)	×
To add or remove a component, click the check box. A shaded box m of the component will be installed. To see what's included in a compon	eans that only part ient, click Details.
Subcomponents of Internet Information Services (IIS):	
	14.1 MB 📥
🗹 🌇 Internet Information Services Manager	1.3 MB
🗆 🥁 Internet Printing	0.0 MB
🗆 🏟 NNTP Service	1.0 MB
☑ ﷺ SMTP Service	1.2 MB
🗹 🧶 World Wide Web Service	8.0 MB
	-
Description: Includes support for throttling and restarting data transfe management console extension.	ers, and a BITS
Total disk space required: 3.0 MB	Details
Space available on disk: 558.7 MB	
OK	Cancel

Figure 2: Internet Information Service Subcomponent Selections

6. Press **OK** to exit the dialogs and install the selected components.

Install Microsoft SQL Server 2005 and Report Server Services

- 1. After inserting the SQL Server 2005 CD, select Install/Server components, tools, Books Online, and samples. The items appear on the initial installation window.
- 2. Click **Next** to progress through the installation windows.
- 3. When the Components to Install window appears, select
 - SQL Server Database Services
 - Reporting Services
 - Workstation components, Books Online and development tools

as shown in Figure 3 (below).

Reporting Services is required for the Archestra Reporting feature. However, the other **Components to Install** options (Analysis Services, Notification Services, and Integration Services) are optional.

Hicrosoft SQL Server 2005 Setup	X
Components to Install Select the components to install or upgrade.	
SQL Server Database Services	
Create a SQL Server failover cluster	
Analysis Services	
Create an Analysis Server failover cluster	
Reporting Services	
Notification Services	
Integration Services	
Workstation components, Books Online and development tools	
For more options, click Advanced.	A <u>d</u> vanced
Help < Back Next >	Cancel

Figure 3: Components to Install

- 4. Click Next.
- 5. Select the **Default instance** (Figure 4 below).

📸 Microsoft SQL Server 2005 Setu	p		×
Instance Name You can install a default instance o instance.	or you can specify a na	med	
Provide a name for the instance. For a Next. To upgrade an existing default ir named instance select Named instance	a default installation, cl nstance, click Default i e and specify the insta	ick Default instan nstance. To upgr nce name.	ce and click ade an existing
Default instance Named instance		_	
Help	< <u>B</u> ack	<u>N</u> ext >	Cancel

Figure 4: Default Instance

- 6. Click **Next**, as indicated on the Instance Name window.
- 7. Use the Built-in System Account and select Local system (Figure 4 below).

🖟 Microsoft SQL Server 2005 Setu	р	×
Service Account Service accounts define which acco	ounts to log in.	
☐ <u>C</u> ustomize for each service acc S <u>e</u> rvice:	:ount	
Use the built-in System account	Local system	•
🔿 Use a domain user account		
Username:		
Password:		
Domain:		
└────────────────────────────────────		
SQL Server	SQL Browser	
SQL Server Agent		
Reporting Services		
Help	< <u>B</u> ack <u>N</u> ext >	Cancel

Figure 5: System Account and Local System Configuration

For more details about the Service Account options, click the following link to the SQL Server 2005 Books Online article Service Account.

- 8. Click Next.
- 9. Select Mixed Mode Authentication (Figure 6 below) and provide your sa-level password.

🔂 Microsoft SQL Server 2005 Setup	×
Authentication Mode The authentication mode specifies the security used when connecting to SQL Server.	
Select the authentication mode to use for this installation.	
<u>W</u> indows Authentication Mode <u>Mund Made (Windows Authentication and SOL Service Authentication) </u>	
Mixed Mode (Windows Auchencication and SQL Server Auchencication);	
Specify the sa logon password below:	
Enter password:	

Confirm password:	

Help < <u>B</u> ack <u>N</u> ext >	Iancel

Figure 6: Mixed Mode Authentication Settings

- 10. Click Next.
- 11. Select Install the default configuration for Report Server (Figure 7 below).

Hicrosoft SQL Server 2005 Setup
Report Server Installation Options Specify how to install a report server instance.
 Install the default configuration Details Install but do not configure the server Setup will install the report server and configure it to use the default values. The report server is usable as soon as Setup is finished.
A Secure Socket Layer (SSL) certificate is not installed on this computer. Microsoft recommends that you use SSL in most Reporting Services installations.
Help < <u>Back</u> Next > Cancel

Figure 7: Report Server Installation Options

12. Click **Next** and complete the SQL Server installation.

Install SQL Server 2005 SP1

Install SQL Server 2005 SP1 using this Microsoft Download Center link.

Verify the Reporting Services Configuration

After SQL Server 2005 SP1 is installed, verify the SQL Reporting Services Configuration.

Click Start/Programs/Microsoft SQL Server 2005/Configuration Tools/Reporting Services Configuration.

The configuration is correct when the MSSQLServer Service is Running and the components have a check mark next them (Figure 8 below).

Configure Report Server



🛃 Connect 👩 <u>R</u> efresh				
Server Status	Report Server St	atus		
Report Server Virtual Directory	Use the Reporting Services Configuration tool to configure a report server deployment. Click an item in the navigation pane to open a configuration page.			
🥝 Report Manager Virtual Directory	Use this page to start or stop the Report Server Windows service.			
🥝 Windows Service Identity	-Instance Properties			
🥝 Web Service Identity	Instance Name:	MSSQLSERVER		
🔗 Database Setun	Instance ID:	MSSQL.2		
	Initialized:	Yes		
Encryption Keys	Service Status:	Running		
Initialization		<u>Start</u> Stop		
Email Settings	Legend			
	Configured			
🚹 Execution Account	🔇 Not configured			
	Optional configurati	on		
	🛕 Recommended conf	iguration		

Figure 8: Correct Reporting Services Configuration

If the Report Server components are not configured as shown, refer to the **Wonderware Information Server Administration Guide** section **Installing Wonderware Information Server/Installing SQL Server Reporting Services**. This section provides details on correct configuration.

Install SharePoint Services 2.0 with SP2

1. Install SharePoint Services 2.0 with SP2 using the following Microsoft Download Center link.

SharePoint Services does not need to be installed using the Server Farm option, as indicated in the original WIS 3.0 documentation.

The basic installation is the Typical Installation option (Figure 9 below).

🖟 Microsoft Windows SharePoint Services 2.0	Setup
Microsoft Windows SharePoint Services 2.	D 111
Type of Installation	
Recommended Install	Description
Typical Installation	Install Windows SharePoint Services and
or choose another type	(IIS) default Web site as a SharePoint team
© <u>S</u> erver Farm	site. This option installs the Microsoft SQL Server Desktop Engine (Windows) (WMSDE) to store site content and configuration data.
	< Back Next > Cancel

Figure 9: SharePoint Services Typical Installation Option

• If the Server Farm option is necessary, select Server Farm, proceed with the installation, and refer to the section Installing SharePoint Services from the Wonderware Information Server Administration Guide.

2. After the SharePoint Services component is installed, verify the installation by typing **localhost** or the server name in the browser's URL field.

The **Team Web Site** page appears (Figure 10 below).



Figure 10: SharePoint Team Web Site Default Page

Check the SQL Server Reporting Services Home Page

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

• Open the browser and enter either http://localhost/reports or http://yourservername/reports (Figure 11 below).



Figure 11: SQL Server Reporting Services Home Page

SharePoint Central Administration Exclude Paths

If the SQL Server Reporting Services home page did not appear, the proper exclude paths must be entered using SharePoint Central Administration.

- 1. Open Open Administrative Tools/SharePoint Central Administration.
- 2. After the SharePoint Central Administration page appears, click **Configure virtual server settings** under **Virtual Server Configuration**.
- 3. Click Default Web Site.

- 4. Expand Virtual Server Management and click Define Managed Paths.
- 5. Add Excluded Paths for **reports** and **reportserver** (Figure 12 below).



Figure 12: Define Managed Paths

- 1. Follow the steps in the Installing Wonderware Information Server section of the Wonderware Information Server 3.0 Readme.
- 2. After installing WIS, verify that additional Excluded Paths were added (Figure 13 below).



Figure 13: Added Paths Included in the Excluded Paths Section

Install the License Server and Licenses.

Install License Server from the WIS 3.0 CD from the \LicenseServer folder.

By default the ArchestrA License Manager will start and ask for a license file to install.

1. Select the ArchestrAServer.lic License File and click OK. The Configure Named User/Device Licenses dialog box appears (Figure 14 below).



Figure 14: Configure Named User/Device Licenses Dialog Box

2. Click Copy to Clipboard then Edit Option File.

You will be asked to create the options file, which will be called **Wonderware.opt**.

- 3. Click Yes and paste the contents of the clipboard into **Wonderware.opt**.
- 4. Edit the Wonderware.opt file similar to Figure 15 (below).

📕 Wonderware.opt - Notepad	- O ×
Eile Edit Format View Help	
### ArchestrA License Server Options File	<u> </u>
### For information on how to use License Server Options files ### please refer to Macrovision FLEXnet Licensing End User Guide ### available at Start Menu => Programs => Wonderware => ArchestrA License Server	
License feature ActiveFactory_RWS_svrDev can include up to 1 hosts # Please change every generic host name to the real one in lowercase letters # and copy/paste the modified template to your License Server Options File INCLUDE ActiveFactory_RWS_svrDev HOST davidu7	
# License feature SVoyager_Portal_svrDev can include up to 1 hosts # Please change every generic host name to the real one in lowercase letters # and copy/paste the modified template to your License Server Options File INCLUDE SVoyager_Portal_svrDev HOST davidu2	
<pre># License feature ActiveFactory_svrDev can include up to 1 hosts # Please change every generic host name to the real one in lowercase letters # and copy/paste the modified template to your License Server Options File INCLUDE ActiveFactory_svrDev HOST davidu7</pre>	
<pre># License feature MEAClient_Sessions_svrDev can include up to 1000 hosts # Please change every generic host name to the real one in lowercase letters # and copy/paste the modified template to your License Server Options File INCLUDE MEAClient_Sessions_svrDev HOST host001 INCLUDE MEAClient_Sessions_svrDev HOST host002 INCLUDE MEAClient_Sessions_svrDev HOST host003</pre>	-
	► //.



- 5. Save the changes and Exit.
- 6. Answer **Yes**, **Yes** and **OK** to the dialog boxes shown in the following graphics.



Figure 16: Start the License Server Prompt



Figure 17: Add License Server Prompt

Ad	d License Server to Licens	e Search Path		×
	Please specify the name of the	computer running the ArchestrA License Server		
	License Server <u>C</u> omputer:	DAVIDU2	<u>T</u> est	
		Use Specific Server Port:		
		▼ Test Server on Close		
		OK]	Cancel	

Figure 18: Specify License Search Path

The completed License Installation appears (Figure 19 below).

🚰 ArchestrA License Manager							
Eile Search Components Options	Help						
🔓 🐹 🐹 昌 鶏 🖄	8						
Searched Machines	Count	Component Name	Туре	Domain	Computer	License Path	
	1	[License Server DAVIDU2]	Server	WOR	DAVIDU2	@DAVIDU2	
E-E DAVIDU2							
E-License Files							
Server							
	•						•
							_
Ready							_ //

Figure 19: Completed License Installation

7. Restart the Wonderware License Manager Service.

You can also reboot the server to ensure that all license changes are propagated to the License Server services. After the server reboots, type http:// localhost/Wonderware or http://servername/Wonderware to display the Information Server Portal (Figure 20 below).



Figure 20: Wonderware Information Server Portal

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