Wonderware System Platform Getting Started Guide

Invensys Systems, Inc.

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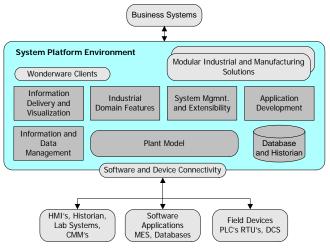
Welcome to System Platform

The Wonderware System Platform is an industrial software platform built on Wonderware's ArchestrA technology for Supervisory HMI, SCADA, and Production and Performance Management. System Platform contains an integrated set of services and an extensible data model to manage plant control and information management systems. System Platform supports both the supervisory control layer and the manufacturing execution system (MES) layer, presenting them as a single information source.

Modular applications sit on top of the System Platform. Wonderware and other third-party integrators are delivering a growing inventory of application components that use System Platform services.

Introducing System Platform Services

The following figure shows the core set of services provided by System Platform.



Industrial Domain Services

System Platform offers industrial domain services that are not provided by commercial operating systems or generic IT products. System Platform's industrial domain services include the following:

- Real-time, peer-to-peer communications and messaging.
- Centralized alarm and event monitoring.
- Data-level security.
- Single global namespace to access data elements anywhere without tag limitations.
- Plant information and supervisory functions.

Software and Device Connectivity Services

System Platform provides cost-effective communication between almost all plant information sources. Diverse systems can be integrated to improve operations and information management.

System Platform's software and device connectivity services include the following:

- Integration of business and manufacturing systems.
- Import and migrate data from legacy systems and external systems.
- Connectors and communication servers for device control and applications.
- Integration with databases, .NET, XML, and other open IT data sources.

Information and Data Management Services

System Platform manages real-time and historical information, including data transformation and storage. Managers and operators have immediate access to key performance indicators (KPIs), event and alarm notifications, and historical data. System Platform also enhances batch management, real-time production monitoring, and access to MES data.

System Platform's information and data management services include the following:

- Content management tools.
- Streaming real-time data.
- A high-performance process historian and production database.

Information Delivery and Visualization Services

You can build applications that rely on System Platform's delivery and visualization services to show manufacturing and business information. System Platform provides the tools to create solutions based on open standards that integrate easily with legacy and new plant systems.

You can use System Platform's information delivery and visualization services to create applications that support:

- Multiple client interfaces, including, thick, Terminal Services Edition (TSE), or a Web client.
- Complex graphical user interfaces developed with standard industry tools.
- Application security to protect data and plant operations.
- Alarm troubleshooting tools.
- Information analysis and reporting tools.
- Multiple-language client support.
- Open access to historical data using SQL queries.

Application Development Services

You can use System Platform and its underlying ArchestrA technology to build modular industrial software solutions based on open standards. A modular development method gives you the flexibility to build applications from common components that can be reused with minimal rework.

You can use System Platform's application development services to create applications that include:

- ArchestrA components created from standard templates.
- Component-based ArchestrA symbols.
- A large set of functions for a wide variety of scripts.
- Different development views that show how the application models the actual plant environment, its distribution across a network, and the relationship between application components.

System Management and Extensibility Services

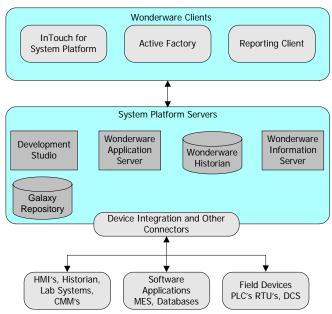
The flexibility of System Platform services gives you the ability to deploy, manage, and extend applications on a range of host computing architectures and network topologies.

You can use the following system management and extensibility services to manage your applications:

- An online database that centrally stores configuration data.
- Flexible architecture to deploy applications on different system topologies.
- Remote application installation and administration.
- Dynamic redistribution of server loading.
- Centralized computer diagnostics and network management tools.

System Platform Functional Components

The following figure shows a functional representation of System Platform, which incorporates the ArchestrA framework.



The ArchestrA Framework consists of server-side configuration and deployment related components. In System Platform, these components include a centralized object repository called Galaxy Repository, an integrated development environment, a data repository, and a Web server for Internet visualization and content management.

Wonderware Development Studio is your development environment to build applications. It includes the ArchestrA IDE and InTouch HMI. Both products include graphic tools, an extensive set of industrial symbols, and functions that can be included in application scripts.

Wonderware Historian is a time-series data optimized plant data historian. It stores plant data from Wonderware I/O Servers, DAServers, and industrial HMI applications. The Historian also contains event, summary, configuration, and system monitoring information. The Historian is tightly coupled to a Microsoft SQL Server database.

Wonderware Information Server is a Web content server to factory information. Wonderware Information Server shows plant floor information from HMI applications, I/O Servers, and Wonderware Historian. Wonderware Information Server delivers interactive HTML pages by converting existing InTouch graphic windows and associated animation to XML, applying an XSL (Extensible Style Language) translation and dynamically rendering VML (Vector Mark-up Language) graphics on the client computer.

The Wonderware System Platform can connect to a diverse set of data sources to integrate all plant and industrial data. Data sources include OPC Servers, databases, and any application that exposes data from an API such as XML, SQL, HTTP, or .Net. In addition, Wonderware provides a library of device integration tools that provide data from the factory floor

- An I/O Server acts as a communication protocol server providing data from PLC's and other factory devices to HMI applications. An I/O Server can be used with any Microsoft Windows program or supervisory application capable of acting as a DDE, FastDDE, OPC, or SuiteLink client.
- A DAServer acts as a communication protocol server providing data from a specific vendor's PLC's and other factory devices. Wonderware offers an extensive family of DAServers for a wide variety of PLC manufacturers.
- A Device Integration (DI) object encapsulates the functionality of a DAServer in the ArchestrA environment. DIObjects are models of the network and devices associated with a specific HMI application. The hierarchy of the actual devices is the same as the hierarchy of the DIObjects.

Wonderware clients include run-time client computers running ArchestrA components, which include a core infrastructure called Platforms, key software applications (Engines), and objects (Framework Objects) that expose framework related functionality. These components are centrally deployed and administered from System Platform's server-side products.

InTouch for System Platform is the visualization client that shows Human Machine Interface (HMI) applications developed with InTouch.

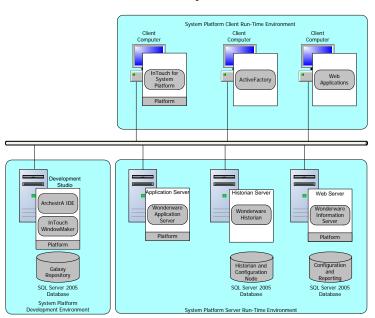
Active Factory shows trending and analysis data obtained from running applications.

The Reporting Client shows Web-based trends and reports obtained from Wonderware Information Server.

Getting Started

This booklet gets you started with System Platform. It explains the basic procedures to install and initially configure the Wonderware products that make up System Platform. This booklet also includes recommendations and best practices to set up Wonderware products.

The following figure shows a common configuration for System Platform consisting of four separate servers. This booklet explains how to install Wonderware products on these servers and create a System Platform environment.



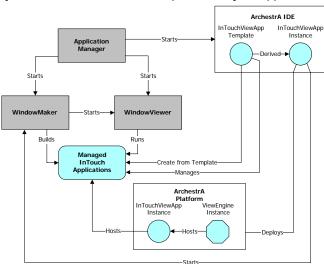
After you set up these servers, you can begin creating an application from Automation objects. If you want a quick summary of the key procedures to set up an application, see Creating an Application on page 51.

The last section of this booklet includes a set of tables that list typical System Platform tasks and a reference for more information. After you install and initially configure your System Platform environment, refer to these tables to get the details you need to begin building your applications.

Setting Up the System Platform Development Studio

InTouch and the ArchestrA IDE are typically installed together on the System Platform Development Studio. You use the Development Studio to build ArchestrA application objects and InTouch visual applications.

The following figure shows the interaction between the ArchestrA IDE and traditional InTouch components. The figure also shows how an InTouch managed application can be can created from the Development Studio. The Development Studio fully integrates InTouch with ArchestrA symbols to build the visual components of your applications.



This booklet emphasizes developing applications with automation objects, which only require the ArchestrA IDE. Refer to the *InTouch Getting Started Guide* for the basics of creating visualization applications with InTouch.

Planning the Installation of the Development Studio

During the installation procedure, you must enter information and make a series of decisions that determine how InTouch HMI and Wonderware Application Server are installed. The following list describes the information you must have ready before setting up the Development Studio.

- ArchestrA user account for node-to-node communication. The ArchestrA user account is used internally by ArchestrA-enabled software. This single account is used to communicate between Application Server, associated utilities, deployed components of your Galaxy application, and other Wonderware software, such as the InTouch HMI.
 - The user account must have administrator privileges.
 - The user account must have a permanent password.
- User account information for the SOL Server 2005 database, which serves as the ArchestrA Galaxy Repository. You must have the following database information:
 - Node name of the computer where the SQL Server database is installed
 - SOL Server 2005 account name.
 - SQL Server 2005 account password.

Note The SQL Server 2005 database must be configured with mixed-mode authentication.

 Make sure the computer that serves as the Development Studio meets the hardware requirements listed in the Wonderware Application Server Readme.

Installing InTouch

Before you begin installing InTouch HMI, gather all materials and information you need based on your planning decisions. Because this is the Wonderware Development Studio, both InTouch WindowMaker and WindowViewer are installed.

To install InTouch HMI

- 1 Log on to the computer as an administrator.
- Insert the InTouch CD into the computer's CD or DVD drive.
- 3 Start the installation procedure.
- 4 Follow the steps in the procedure to install InTouch HMI according to your planning decisions.
 - The last step in the InTouch HMI installation procedure includes a check box to specify whether to install the ArchestrA IDF or not.
- 5 Select the check box and click Finish. You see a dialog box to specify the location of the Wonderware Application Server CD.

Note You may be required to reboot the computer after installing InTouch HMI. If so, you must manually start the ArchestrA IDE installation after the reboot.

Continue with the next procedure to install Wonderware Application Server.

Installing Wonderware Application Server

Before you start installing the Wonderware Application Server, gather all materials and information you need to complete the procedure.

To install the Wonderware Application Server

- If necessary, log on to the computer as an administrator.
- Insert the Wonderware Application Server CD into the computer's CD or DVD drive.
- Start the installation program.
- Follow the steps in the procedure to install Wonderware Application Server.
- 5 Accept the default to install all Wonderware Application Server features, which includes the Archestra IDE. Bootstrap, Galaxy Repository, and product documentation.
- 6 Click Finish after all files are copied to your computer.

Installing Wonderware Licenses

Wonderware enforces the usage of its products with a software license. After you install a Wonderware product, you must install a single license file. WWSUITE.LIC, which contains your customer information, product data, and software features. Until you apply your Wonderware license, you can run InTouch HMI only in demonstration mode.

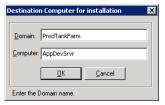
You use the License Utility to install the contents of the WWSUITE.LIC file to the computer where InTouch HMI is installed. The License Utility is included as a common ArchestrA component when you install InTouch.

The next section describes how to install components from the Wonderware Application Server to the node designated as the System Platform Application Server. In addition to the Development Studio license, you must install the Wonderware Application Server run-time license on the Development Studio. The run-time license includes

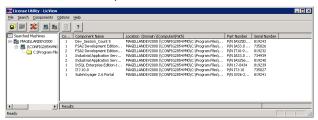
licensing components for Galaxy I/O and Platform counts. Then, a Platform can be deployed from the Development Studio to the Application Server node to enable its functionality.

To install your Wonderware product license

- 1 Log on to the computer as an administrator.
- Insert the Wonderware Development Studio license CD into the computer's CD-ROM or DVD drive.
- 3 Start the License Utility by doing the following:
 - a Click Start, and then Programs to show the Wonderware folder.
 - b Click the Wonderware folder, and then click the Common folder to show the list of common utilities.
 - c Click License Utility.
- 4 On the File, menu, click Install License File. The Choose a License File to install dialog box appears.
- 5 Browse the Wonderware license CD.
- 6 Select the WWSUITE.LIC file and click Open. The Destination Computer for installation dialog box appears.



Type the domain and computer names and click **OK**. The License Utility copies the WWSUITE.LIC file to the C:\Program Files\Common Files\ArchestrA\License folder on the selected computer.



Repeat steps 1-7 to install the Wonderware Application Server run-time license on the Development Studio node. Now you can start creating applications. The next section explains how to start the ArchestrA IDE and create a Galaxy.

Using the ArchestrA IDE

The ArchestrA IDE is the Integrated Development Environment provided by the Wonderware Application Server. You use the ArchestrA IDE to build your applications.

Starting the ArchestrA IDE

You can start the ArchestrA IDE from the Windows Start menu or from InTouch Application Manager.

The following procedures show several ways to start the ArchestrA IDE. The procedures vary slightly based on the Windows operating system installed on the Development studio server.

To start the ArchestrA IDE from the Windows Start Menu

Click the Windows Start button.



Click the ArchestrA IDE icon from the list.

The Connect to Galaxy dialog box appears.

If ArchestrA IDE is installed on the same computer as InTouch HMI, you can start the ArchestrA IDE from the Application Manager.

To start the ArchestrA IDE from Application Manager After starting InTouch Application Manager, do one of the following:



- Click the ArchestrA IDE icon on the toolbar.
- On the File menu, click ArchestrA IDE.
- Press CTRL + L

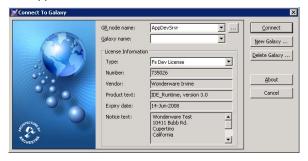
The Connect to Galaxy dialog box appears.

Creating a Galaxy

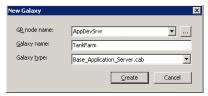
The first time you start the ArchestrA IDE you need to create a Galaxy. After that, you can select the Galaxy in which you are developing applications each time you start the ArchestrA IDF.

To create a Galaxy

Start the ArchestrA IDE. The Connect to Galaxy dialog box appears.

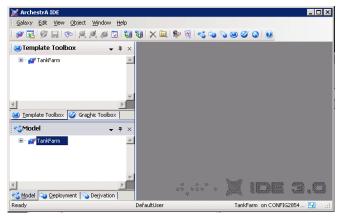


Click New Galaxy. The New Galaxy dialog box appears.



- 3 Complete the fields of the New Galaxy dialog box by doing the following:
 - Type the node name of the computer that hosts the Galaxy Repository (GR). The System Platform configuration described in this booklet places the Galaxy Repository on the computer that serves as the Development Studio.
 - Type the name of the Galaxy that you are creating.
 - Select Base_Application_Server.cab as the type of Galaxy from the drop-down list of the Galaxy Type box.
- Click Create. The New Galaxy dialog box shows the progress of creating a new Galaxy.
- Click Close after the new Galaxy is created. 5
- 6 Click Connect to connect to the Galaxy you created.

The ArchestrA IDE dialog box appears.



The Template Toolbox shows the name of the Galaxy you created.

The next several sections of this booklet explain how to set up the other servers that make up System Platform. After you have set up these servers, Creating an Application on page 51 explains how to use the ArchestrA IDE to create an application with automation objects.

Setting Up the System Platform Application Server

This section explains how to set up the Application Server, which serves as the platform to run your ArchestrA applications in a System Platform environment.

Setting up an Application Server consists of a subset of the tasks to set up the Development Studio. You only have to install the Bootstrap feature from Wonderware Application Server.

Planning Your Application Server Installation

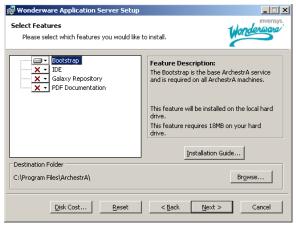
During the installation procedure, you must enter information and make a series of decisions that determine how Wonderware Application Server is installed. The Application Server must meet the same requirements specified for the Development Studio. For more information about these requirements, see Planning the Installation of the Development Studio on page 14.

Installing the Wonderware **Application Server Bootstrap**

Before you start the installation procedure, gather all materials and information you need to complete the procedure.

To set up the Application Server

- If necessary, log on to the computer as an administrator.
- Insert the Wonderware Application Server installation CD into the computer's CD-ROM drive.
- Follow the steps in the procedure to install Wonderware Application Server.
- Install only the Bootstrap feature from the Wonderware Application Server.



Click Finish after all files are copied to your computer.

Installing the Wonderware License

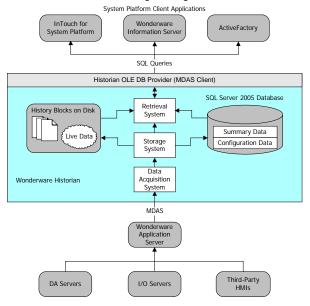
You should have installed the Wonderware Application Server run-time license when you installed the Development Studio license in the previous section. After you deploy a Platform to the Application Server, its licensed functionality should be enabled.

Follow the procedure described in Installing Wonderware Licenses on page 16 for the steps to install the license on the Application Server.

Setting Up the System Platform Historian Server

The Wonderware Historian is the System Platform's high-speed data acquisition and storage system. It stores historical and real-time data. Summary and configuration data are stored in the embedded SQL Server 2005 database. Time-series historical data is stored in optimized file structures on disk called History Blocks.

The following figure shows a high-level functional view of the Historian's data storage design.



Wonderware Application Server pushes data to the Historian through a service called Manual Data Acquisition Service (MDAS). Client applications use the MDAS service to retrieve historical and real-time data from the Historian.

Setting Up the Historian Server

The following list shows the key steps to build the System Platform Historian server.

Complete these steps in the following order:

- Verify hardware and software requirements to install the Wonderware Historian.
- Install Microsoft® SQL Server 2005, including Reporting Services.
- Install Wonderware Historian.
- 4 Install the License Server and product licenses.

Planning Considerations

You should carefully consider how you expect to save your plant data before installing the Historian server. This plan should include the type of network architecture for the historian system, considerations for how much disk space is required for data storage, and the amount of space required for the historian database files and log files.

Historian Server Hardware and Software Requirements

Follow these recommendations to prepare the computer designated as the Wonderware Historian:

- The minimum hardware and software requirements for the Wonderware Historian are based on the anticipated application tag count and data throughput. Refer to the Wonderware Historian Readme file for the requirements for the different levels of Historian servers.
- Install Wonderware Historian as the only application on a dedicated computer in your production environment. Do not host any other application on the Historian server.
- If possible, the Historian server should use SCSI drives using hardware RAID. The required disk storage capacity is a function of the anticipated source data throughput and the length of time you want to retain data before archiving it.

Microsoft SOL Server Database Requirements

Follow these recommendations to configure the SQL Server database for use with the Wonderware Historian:

- The SOL Server 2005 database must be installed and running before installing Wonderware Historian. Apply all Microsoft Service Packs and updates.
- Install the SOL Server 2005 database on the Historian server. Remote instances of a SQL Server 2005 database. are not supported.
- The database used by the Historian must be the primary instance.
- Install only a single instance of Microsoft SQL Server database on the Historian server.
- The Microsoft SOL Server Default instance must be selected. Named instances of a SQL Server 2005 database are not supported by the Historian.
- Configure SQL Server 2005 to use any case-insensitive dictionary sort order.
- Configure SQL Server 2005 to use TCP/IP as its network protocol.

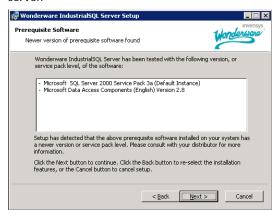
Installing Wonderware Historian

Before installing Wonderware Historian, make sure the computer meets all hardware and software requirements.

To install Wonderware Historian

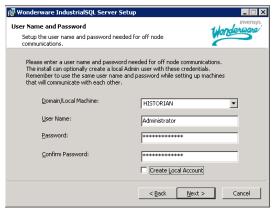
- Log on to the Historian server with an account with Windows administrator privileges.
- Insert the Wonderware Historian Server installation CD and start the installation program.
- Proceed through the installation steps.
- At the Select Features dialog box, select all Historian features.

Continue until you reach the Prerequisite Software dialog box, which contains a message that newer versions of prerequisite software are installed on the Historian server.



- Click Next to continue with the installation.
- At the User Name and Password dialog box, clear the Create Local Account check box.

Use the same ArchestrA user account that you specified when you set up the Development Studio server.



- Enter the name and password of your ArchestrA user account that you created earlier.
- Click Next to continue. The Ready to Install the Application dialog box appears.
- 10 If necessary, select the Launch OSConfiguration Utility check box and click Next to start installing files.
 - The Updating System dialog box shows the progress of the installation. The installer halts and shows the OS Configuration Utility dialog box if it detects that Historian software is being installed on a computer that belongs to an Active Directory domain.
- 11 Click OK to finish the installation.
 - After the Historian installation program finishes, the database Configuration automatically starts. This utility creates the required databases and makes any required changes to the Microsoft SQL Server databases.
- 12 Click Finish. You may be required to reboot the computer.

Applying the Wonderware Historian License

The Wonderware Historian requires a valid license to run. The Historian checks that a valid license file exists at the expected location and one or more feature lines relevant to the product are contained in the license file. A feature line defines specific behavior that is allowed for the product. Typically, feature lines are bundled together according to pre-defined licensing schemes.

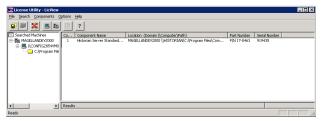
To install the Wonderware Historian license

- Log on to the Historian server as an administrator.
- 2 Insert the Wonderware Historian license CD into the computer's CD-ROM or DVD drive.
- Start the License Utility by doing the following:
 - a Click Start, and then Programs to show the Wonderware folder.

- b Click the Wonderware folder, and then click the Common folder to show the list of common utilities.
- c Click License Utility.
- On the File menu, click Install License File. The Choose a License File to install dialog box appears.
- Browse the Wonderware license CD.
- Select the WWSUITE.LIC file and click Open. The Destination Computer for installation dialog box appears.



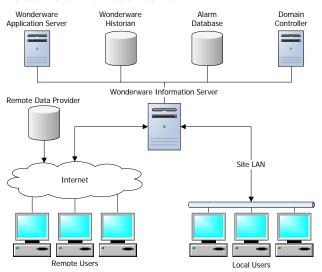
Type the domain and computer names and click **OK**. The License Utility copies the WWSUITE.LIC file to the C:\Program Files\Common Files\ArchestrA\License folder on the selected computer.



Click File, and then Exit to close the License Utility. You have set up the Historian Server. Now, you need to configure your Galaxy to save data from your running processes as historical data. Refer to Saving Historical Data from Application Objects on page 54 for instructions to configure your Galaxy to save process data to the Historian after you have created application objects.

Setting Up the System Platform Web Server

Wonderware Information Server is the System Platform's Web Content Server for factory information. Wonderware Information Server shows plant floor information obtained from HMI applications, alarm databases, I/O Servers, and the Wonderware Historian. The following figure summarizes the typical data sources for information presented by Wonderware Information Server.



Users access information from Wonderware Information Server using Internet Explorer 6.0 or higher without additional hardware and software requirements.

Wonderware Information Server works with several technologies including Wonderware Historian, Microsoft SQL Server, Internet Information Services (IIS), .NET Framework, SharePoint Services, and Internet Explorer.

Setting Up a Web Server

The following list shows the key steps to build the System Platform Web server. The steps include installing required third-party software. Wonderware Information Server, and applying Wonderware licensing.

Complete the basic steps in the following order:

- Start with a clean Windows® Server 2003 SP1 or Windows Server 2003 R2 computer connected to the network.
- Install Internet Information Services and ASP.NET.
- Install Microsoft® SQL Server 2005, including Reporting Services.
- If necessary, apply SP2 to SQL Server 2005.
- Verify the Reporting Services Configuration.
- Install SharePoint Services 2.0 with SP2. You can also install SharePoint Services before installing SOL Server 2005.
- Check the SQL Server Reporting Services Home Page.
- If the SQL Report Services Home Page does not open, then use SharePoint Central Administration to exclude paths.
- Install WIS 3.0.
- 10 Install the License Server and product licenses.

Verify Hardware and Software Requirements

The following table lists the minimum and recommended hardware requirements for the server that hosts Wonderware Information Server 3.0.

Hardware	Required Minimum	Recommended
CPU	2.5 GHz Pentium 4	3.0 GHz Pentium 4
Memory	1 GB RAM	2 GB RAM
Disk space	5 GB	10 GB
File System	NTFS	

Before you install Wonderware Information Server, install and configure the software shown in the following table.

Software	Recommended Version
Windows Server 2003 R2	SP1, SP2, or R2
Windows SharePoint Services	2.0 SP2
SQL Server Reporting Services	2005 SP1
Microsoft Excel	2000, XP, 2003, or 2007
Microsoft XML Parser	4.20.9818.0
Microsoft Capicom module	2.0.0.3
Microsoft ASP.NET	2.0
Microsoft .NET Framework	2.0
Internet Information Services (IIS)	6.0 or later
Microsoft Internet Explorer	6.01 SP1 or later

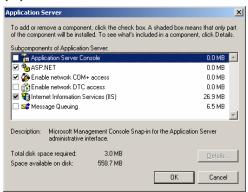
Install Internet Information Services and ASP NET

After setting up Windows Server 2003 on your designated System Platform Web server, install Internet Information Services (IIS) and ASP.NET.

To install IIS and ASP.NET

- 1 Log on to the computer as an administrator.
- 2 Open the Control Panel, and then click on Add or Remove Programs.
- 3 Click Add/Remove Window Components. The Windows Components Wizard dialog box appears.
- 4 Select the Application Server, and then click Details.

Verify that ASP.NET and Internet Information Services (IIS) are selected.



- Select Internet Information Services (IIS) and click Details.
- Clear FrontPage 2002 Server Extensions and select 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 Information Server 3.0 can also work without this option installed)
 - World Wide Web Service
- Click OK to return to the Windows Components Wizard dialog box.
- Click Next to begin installing the subcomponents you selected. If requested, insert your Windows Server 2003 installation CD to complete the installation.

Install Microsoft SQL Server 2005 and Report Server Services

To use the ArchestrA Reporting feature, you must install and configure SQL Server Reporting Services and set up a reporting database before installing Wonderware Information Server.

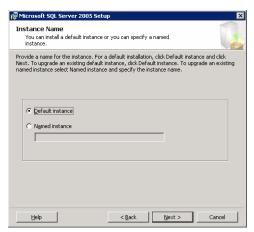
To install Microsoft SQL Server and Report Server

- 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.
- 3 When the Components to Install dialog box appears, select:
 - SQL Server Database Services
 - Reporting Services
 - Workstation components, Books Online and development tools



Reporting Services is required for the ArchestrA Reporting feature. However, the other options (Analysis Services, Notification Services, and Integration Services) are optional.

- Click Next. 4
- Select the Default instance and click Next.



Click Built-in System Account and select Local system.



Click Next.

8 Select Mixed Mode authentication and provide your system administrator-level password.



- 9 Click Next.
- 10 Select Install the default configuration for Report Server.



11 Click Next and complete the SQL Server installation.

Verify the Reporting Services Configuration

After SQL Server 2005 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 MSSQL Server Service is Running and the components have a check mark next them.



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.

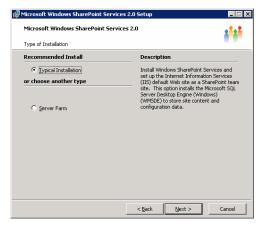
Install SharePoint Services 2.0 with SP2

To use the MultiView feature, you must install and configure Windows SharePoint Services 2.0 SP2 before installing Wonderware Information Server, Also, install any WSS Language Packs for languages you want Wonderware Information Server to support.

To install SharePoint Services

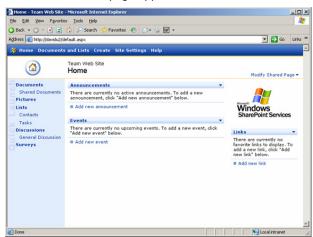
Install SharePoint Services 2.0 with SP2 using the Typical Installation option.

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.



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.



Check the SQL Server Reporting Services Home Page

After installing SharePoint Services, verify that the SQL Server Reporting Services home page appears. Open your Web browser and type either:

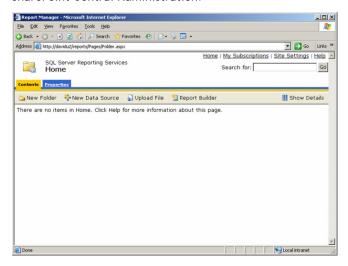
http://localhost/reports

or

http://yourservername/reports.

Set SharePoint Central Administration **Exclude Paths**

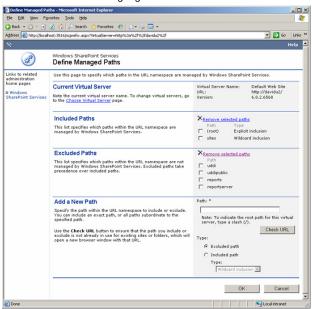
If the SQL Server Reporting Services home page does not appear, the proper exclude paths must be specified using SharePoint Central Administration.



To set exclude paths from SharePoint

- Open Administrative Tools/SharePoint Central Administration.
- 2 After the SharePoint Central Administration page appears, click Configure virtual server settings under Virtual Server Configuration.
- Click Default Web Site.
- Expand Virtual Server Management and click Define Managed Paths.

Add Excluded Paths for reports and reportserver as shown in the following figure.



Install Information Server 3.0

Close any open Windows applications before installing Wonderware Information Server. If you are using a remote computer to host the repository database, the account must have administrator privileges on that computer as well.

To install Wonderware Information Server

- Log on with an account that has Windows administrator privileges.
- Insert the Wonderware Information Server 3.0 CD into the computer's CD-ROM drive. The Welcome dialog box appears.
- Click Next. The License Agreement dialog box appears.

- 4 Accept the agreement and click Next. The Wonderware Information Server Preinstallation Information dialog box appears.
- 5 Make sure that all installation requirements are met, then click Next. The Select Features dialog box appears.
- 6 Select the features you want to install. All features are selected by default. Click Next. The System Information dialog box appears.
 - This dialog box shows information regarding the local computer, such as the current version of IIS and the IIS scripts folder.
- 7 Click Next. The User Information dialog box appears.
- 8 Type the registration information for the installation. Enter the name of the person, group, or company licensed to use Wonderware Information Server.
- 9 Click Next. The Wonderware Information Server Portal Account dialog box appears.

Provide the user account information used by 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.

Log on to

Valid Windows domain in which the user account is validated.

User Name

Valid logon name in the specified domain.

Password and Confirm Password

Valid logon password for Windows.

The installation program validates the specified user account information.

10 Click Next. The Destination Folders and Virtual Directory dialog box appears.

The destination folder contains all files related to the Wonderware Information Server. Click **Browse** to change the destination folder.

The Virtual Directory Name is the IIS Virtual Directory name by which you access Wonderware Information Server. You can use the default name ("Wonderware") or type a new name.

11 Click Next. The Repository Authentication dialog box appears.

The repository is the SQL Server database that Wonderware Information Server uses to store administration and configuration information.

- 12 In the Server Name box, enter the name of the SQL Server host on which you want to create the repository.
- 13 Click Use Windows authentication to log on to SQL Server using your current Windows account, or click Use SOL Server authentication and enter the SOL Server authentication information.

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

The installation program validates the specified authentication information. It checks that you are running the required version of SQL Server and that you have administrative rights for the SQL Server.

- 14 Click Next. If you selected to install the ArchestrA Reporting feature, the Alarm Data Source dialog box appears. Specify a data source name and connection information for the alarm database that you want to use for the sample reports. The setup program creates a default alarm data source.
- 15 Click Next. If you selected to install the ArchestrA Reporting feature, the Historian Data Source dialog box appears. Specify a data source name and connection

information for the IndustrialSQL Server historian database that you want to use for the sample reports. The setup program creates a default historian data source.

- 16 Click Next. If you selected to install the ActiveFactory Reporting feature, the ActiveFactory Reporting Setup dialog box appears. Specify a virtual directory name for the Reporting Web site data. Also, specify a SQL Server administrator account for the Historian data source that you specified in the previous step.
- 17 Click Next. The Ready to Install the Application dialog box appears. Click Next again.

The setup program starts upgrading your system. When it is done, click Finish. If you selected to install the ActiveFactory Reporting feature, the ActiveFactory language packs are now installed.

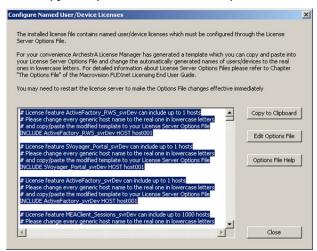
You may be prompted to reboot the computer. After the reboot, log on to the computer with administrative permissions

Install the License Server and Licenses

To install the License Server and licenses

- 1 Install License Server from the \LicenseServer folder of the Information Server CD.
 - After installing the License Server, the ArchestrA License Manager starts and ask for a license file to install.
- 2 Select the ArchestrAServer.lic license file and click OK. The Configure Named User/Device Licenses dialog box appears.

Click Copy to Clipboard then click Edit Option File.



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

- Click Yes and paste the contents of the clipboard into the Wonderware.opt file.
- Edit the Wonderware.opt file similar to the figure below.

```
Wonderware.opt - Notepad
 File Edit Format View Help
           Archestra License Server Options File
*** 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_syrDev can include up to 1 hosts
Please change every generic host name to the real one in lowercase letters
and copy/paite the modified template to your License Server options File
INCLUDE ActiveFactory_RWS_syrDev HoST davidu7
# License feature Svoyager_Portal_svrbev 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
License feature ActiveFactory_svrbev 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_svrbev MoST davidu7
License Feature MEACITENT_SESSIONS_SYPDEV can include up to 1000 hosts

*Please change every generic nost name to the real one in lowercase letter

* and copy/paste the modified template to your License Server options File

INCLUDE MEACITENT_SESSIONS_SYPDEV HOST host002

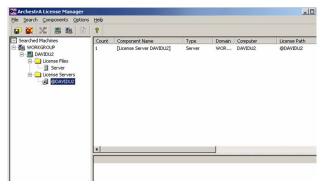
INCLUDE MEACITENT_SESSIONS_SYPDEV HOST host002

INCLUDE MEACITENT_SESSIONS_SYPDEV HOST host003
```

- Save the changes and Exit after making your changes.
- Click Yes to start the license server on the computer.

- 8 Click Yes to add the license server to the license search path.
- 9 Click OK.

The completed License Installation appears.



- 10 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.
- 11 After the server reboots, type http://localhost/ Wonderware or http://servername/Wonderware to display the Information Server Portal.

Creating an Application

This section explains how to create an application with the ArchestrA IDE located on the System Platform Development Studio. You can create both visualization applications with InTouch or object applications with the ArchestrA IDE.

This booklet explains how to create a production application with application objects. If you want to learn more about creating visualization applications, see the *InTouch Getting Started Guide* included in your InTouch distribution case.

Here are the major tasks to create an ArchestrA application with objects:

- Create a plant model that represents your actual production processes.
- Build your deployment infrastructure with ArchestrA system objects.
- Create your plant process by adding Application objects to your Model view.
- Configure your system and application objects to save historical data to the Wonderware Historian.
- Deploy the Galaxy containing your application objects.

The remainder of this section explains how to complete these tasks to create an ArchestrA application with automation objects.

Creating a Plant Model

With the System Platform Development Studio you can create a working model of your plant manufacturing environment. A plant model consists of objects that represent your actual plant. You configure these objects to your own specifications and create templates from them that you can propagate from one area to another. After you create your plant model, applications can be easily extended or replicated based on the model you created.

Here are the basic steps to create a plant model:

- Create a template toolset to store your derived templates.
- Derive a template from the \$Area object.
- Derive instances from your derived Area template.
- Arrange the area instances to model your plant layout.
- Create application object templates and instances.
- Arrange the application object instances within the model view to match your plant layout.

To create a template toolset

- Open the ArchestrA IDE on your Development Studio server.
- Click Template Toolbox tab.
- Right-click on the Galaxy you created earlier and select New Template Toolset from the action menu to create a toolset.
- Assign a name to your template toolset.

To derive a template from the \$Area object and create Area instances

- In the Template Toolbox, right-click on the \$Area template and select New, and then Derived Template.
- Right-click on the derived template and select Rename to assign a name to it.
- Move your derived Area template to the template toolset 3 you created earlier.

- Click the Model tab to show the Model view.
- 5 Create a new instance of your derived Area template by dragging it from your template toolset and dropping it in the Model view.
 - The new Area instance appears beneath your Galaxy in the Model view.
- Assign a new name to the derived Area instance you created.
- Repeat steps 2 through 6 to create other instances of your Area template needed to represent all areas of your plant model.
- From the Model view, drag those instances you want to be sub-areas by dropping them on the area instances that will contain them.

Creating Application objects

Application objects represent actual objects in your production environment. There are different types of Application objects based on the types of data associated with their attributes. Also, you assign application objects to specific areas within your model that represents your actual production process.

Follow the same general procedural steps you used to create your areas within your plant model.

- Derive a template from a base application template.
- 2 Rename your derived application object template and place it in your template toolset.
- Move the application template to the Model view. 3 The instance appears in the Unassigned Area of the Model view.
- Edit the application object instance and assign values to the object's attributes.
 - The next section explains how to configure your application instances to save historical data to the Historian.

Saving Historical Data from **Application Objects**

Your Galaxy can be configured to store history data to one or more System Platform Historians that are part of the same network. Each application engine in the Galaxy is configured with the node name of the Historian server stored as an attribute of the application engine.

Wonderware Historian requires a Historian tag to be configured in its database for each attribute whose values will saved as historical data by an Automation object. There is a one-to-one relationship between an object's attribute and a tag in Wonderware Historian.

Here is a summary of the main steps to save historical data from ArchestrA automation objects:

- Configure a WinPlatform object to use a Store & Forward folder.
- Configure an AppEngine object to save data to the Historian.
- Configure an automation object to save attribute values to the Historian.

The following procedures explain how to complete these steps.

To configure a WinPlatform Object Store & Forward folder

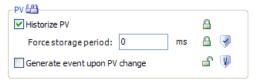
- Double-click on an instance of a WinPlatform object to open the configuration editor.
- In the Network address box, type the node name of the computer containing the Store & Forward folder.
- In the History Storeforward directory box, type the folder path and name of the Store & Forward folder.
- Click Save and then Close.
- Check in the WinPlatform object.

To configure an AppEngine object to save historical data

- Double-click on the AppEngine instance to open the configuration editor.
- Select the Enable storage to historian check box.
- In the Historian box, type the node name of the Historian server.
- 4 Click Save and then Close.
- Check in the AppEngine instance. 5

To configure an automation object to save historical data

- Select an automation object whose attribute values you want to save to the Historian. The configuration editor appears.
- 2 Click the configuration editor tab containing the Historize area.
- Set values to the historical attributes of your automation object.



- Click Save and then Close.
- 5 Check in the automation object.

Deploying your Galaxy

Deploying your Galaxy copies the objects you created from the ArchestrA IDE to your System Platform run-time environment.

You deploy object instances to place an application into production, to process your plant data, or update an existing application.

Here are the major tasks to deploy your Galaxy:

- Create an instance of the \$WinPlatform system object.
- Create an instance of the \$AppEngine system object.
- Assign the System objects to areas in the Model view.
- Create a deployment model by assigning your areas to their respective AppEngine instances in the Deployment
- Deploy your Galaxy.

To create a \$WinPlatform object

- In the Template Toolbox, derive a template by right-clicking on the \$WinPlatform system object and select New, and then Derived Template.
 - A new derived WinPlatform object appears in the Template Toolbox.
- Right-click on your derived WinPlatform template, select Rename, and then type a new name for it.
- Move your derived template to your template toolset that you created earlier.
- Derive a new instance from the derived WinPlatform object. The new instance appears in the Unassigned Area of the Model view.
 - The instance appears in the Unassigned Area of the Model view.
- 5 Assign a new name to the WinPlatform instance in the Model view.
- Drag the WinPlatform instance to the area of your plant model that contains all other areas you created.
- Edit the WinPlatform instance and assign any instance-specific information like the node name.

To create an \$AppEngine object

- In the Template Toolbox, derive a template by right-clicking on the \$AppEngine system object and select New, and then Derived Template.
 - A new derived AppEngine object appears in the Template Toolbox.
- Edit the derived template and specify any standard template information.
- Right-click on your derived AppEngine template, select 3 Rename, and then type a new name for it.
- Derive a new instance from the derived AppEngine object.
 - The new instance appears in the **Unassigned Area** of the Model view.
- Edit the AppEngine instance within any instance-specific 5 information, such as the name of the Wonderware Historian node.

The system objects instances you created need to be assigned to their areas within the Model View. The next procedure explains the step to assign WinPlatform and AppEngine objects to your deployment model.

To create the Deployment model

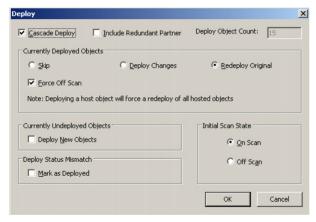
- Select the **Deployment** tab to show the Deployment view
 - The Deployment view shows the areas, system objects, and application objects you created earlier.
- Drag the AppEngine instance to the area that you placed 2 the WinPlatform instance earlier.
- Drag your areas to their respective AppEngine instances. You should see a hierarchy.
- Drag your AppEngine instance and drop it on the area that represents your platform.

Select all other areas and assign them to the AppEngine instance.

You should see a hierarchy of the AppEngine instance beneath your platform object. All other areas should be indented beneath the AppEngine instance.

To deploy your Galaxy

On the Deployment view, right-click your platform instance, and then select Deploy. The Deploy dialog box appears.



The Cascade Deploy check box should be selected by default.

- Keep the default values of the Deploy dialog box and click OK. The dialog box shows the progress of the deployment.
- Click Close when the Galaxy has been deployed. After you deploy your application, the Model and Deployment views show your instances in their deployed state.

Getting More Information

The System Platform library consists of a set of online books and help. Each Wonderware product that is part of System Platform includes individual documentation about using the product.

System Platform documentation is offered in two different media:

- Portable Document File (PDF), which can be viewed with Adobe[®] Reader[®]. Each book is included on the product installation CD as a PDF file.
- Online help, which can be viewed while an application is running.

The PDF books and online help include a table of contents, an index, and a search function to find information quickly.

Wonderware product information uses a task-based approach. This means that books and help are organized by the typical tasks to install, configure, and use a Wonderware product.

The remainder of this section includes a table for each Wonderware product that is part of System Platform. Each table lists the typical tasks to use this product with System Platform and a reference to a book for more information.

Getting More Information About Wonderware Application Server

If you want more information about	See	
Creating a managed application with the ArchestrA IDE	Chapter 2 of the <i>InTouch HMI and ArchestrA Integration Guide</i>	
Managing applications with the ArchestrA IDE	Chapter 2 of the <i>InTouch HMI and ArchestrA Integration Guide</i>	
Working with ArchestrA Objects	Chapters 2, 3, and 4 of the Wonderware Application Server User's Guide	
Using ArchestrA symbols in InTouch applications	Chapter 3 of the <i>InTouch HMI and ArchestrA Integration Guide</i>	
Creating ArchestrA symbols	Chapter 1 of the <i>Creating and Managing ArchestrA Graphics User's Guide</i>	
Managing ArchestrA symbols	Chapter 3 of the <i>Creating and Managing ArchestrA Graphics User's Guide</i>	
Using the Symbol Editor tools	Chapters 4 and 5 of the <i>Creating</i> and <i>Managing ArchestrA Graphics</i> User's Guide	
Editing the properties of ArchestrA symbols	Chapters 6 and 7 of the <i>Creating</i> and <i>Managing ArchestrA Graphics</i> <i>User's Guide</i>	
Assigning custom properties and animations to ArchestrA symbols	Chapter 8 and 9 of the <i>Creating</i> and Managing ArchestrA Graphics User's Guide	
Adding scripts to ArchestrA symbols	Chapter 10 of the <i>Creating and Managing ArchestrA Graphics User's Guide</i>	
Embedding ArchestrA symbols	Chapter 12 of the <i>Creating and Managing ArchestrA Graphics User's Guide</i>	
Deploying and managing Galaxies	Chapters 6 and 11 of the Wonderware Application Server User's Guide	
Working with alarms and history data	Chapters 7 and 8 of the <i>Wonderware Application Server User's Guide</i>	
Running a managed application in WindowViewer	Chapter 4 of the <i>InTouch HMI and ArchestrA Integration Guide</i>	

Getting More Information About InTouch

If you want more information about	See	
Creating stand-alone applications	See Chapter 2 of the <i>InTouch</i> Application Management and Extension Guide	
Managing InTouch applications	Chapter 1 of the <i>InTouch HMI</i> Application Management and Extension Guide	
Creating tags	Chapter 2 of the <i>InTouch HMI Data Management Guide</i>	
Using SuperTags and indirect tags in an application	Chapters 6 and 7 of the <i>InTouch</i> <i>HMI Data Management Guide</i>	
Creating window elements for an application	Chapter 3 of the <i>InTouch HMI</i> Visualization Guide	
Animating window elements for an application	Chapter 4 of the <i>InTouch HMI</i> <i>Visualization Guide</i>	
Using wizards to create window objects	Chapter 5 of the <i>InTouch HMI</i> Visualization Guide	
Setting alarms and events for an application	Chapter 2 of the <i>InTouch HMI</i> Alarms and Events Guide	
Viewing and acknowledging alarms	Chapters 4 and 5 of the <i>InTouch</i> <i>HMI Alarms and Events Guide</i>	
Logging data from an application	Chapter 9 of the <i>InTouch HMI Data Management Guide</i>	
Creating scripts in applications	Chapters 1-5 of the <i>InTouch HMI</i> Scripting and Logic Guide	
Securing an InTouch application	Chapter 5 of the <i>InTouch HMI</i> Application Management and Extension Guide	
Setting up remote data sources for an application	Chapter 5 of the <i>InTouch HMI Data Management Guide</i>	
Using InTouch supplementary components	Chapters 1-5 of the <i>InTouch HMI</i> Supplementary Components Guide	
Using SmartSymbols in an application	Chapters 1-4 of the <i>InTouch HMI</i> SmartSymbols Guide	
Distributing applications across multiple computers	Chapter 2 of the InTouch HMI Application Management and Extension Guide	

Getting More Information About Wonderware Historian

If you want more information about	See	
Understanding Historian concepts	Chapters 1 to 7 of the IndustrialSQL Server Historian Concepts Guide	
Understanding the Historian database schema	Chapters 1 to 6 of the IndustrialSQL Server Historian Database Reference	
Using Historian tools	Chapter 1 of the <i>IndustrialSQL</i> Server Historian Administration Guide	
Configuring tags	Chapter 2 of the <i>IndustrialSQL</i> Server Historian Administration Guide	
Configuring events	Chapter 10 of the <i>IndustrialSOL</i> Server Historian Administration Guide	
Configuring data acquisition	Chapter 4 of the <i>IndustrialSQL</i> Server Historian Administration Guide	
Importing and exporting configuration information	Chapter 3 of the <i>IndustrialSQL</i> Server Historian Administration Guide	
Migrating information to the Historian database	Chapter 3 of the IndustrialSQL Server Historian Installation Guide and Chapter 6 of the IndustrialSQL Server Historian Administration Guide	
Managing database security	Chapter 7 of the <i>IndustrialSQL</i> Server Historian Administration Guide	
Monitoring the Historian	Chapter 9 of the <i>IndustrialSQL</i> Server Historian Administration Guide	
Changing Historian properties	Chapter 8 of the <i>IndustrialSQL</i> Server Historian Administration Guide	
Setting up Historian failover clustering	Chapters 1 to 3 of the IndustrialSQL Server Historian Enterprise Edition User's Guide.	

Getting More Information About Wonderware Information Server

If you want more information	
about	See
Planning a WIS deployment	Chapter 2 of the <i>Wonderware Information</i> Server Administration Guide
Installing WIS	Chapter 2 of the <i>Wonderware Information</i> Server Administration Guide
Managing security	Chapter 2 of the <i>Wonderware Information</i> Server Administration Guide
Configuring data source	Chapter 5 of the <i>Wonderware Information</i> Server Administration Guide
Configuring factory alarms	Chapter 6 of the <i>Wonderware Information</i> Server Administration Guide
Configuring access panels	Chapter 7 of the <i>Wonderware Information</i> Server Administration Guide
Customizing WIS	Chapter 9 of the <i>Wonderware Information</i> Server Administration Guide
Using TableWeaver	Chapter 12 of the <i>Wonderware Information</i> Server Administration Guide
Converting InTouch windows to WIS web pages	Chapter 2 of the <i>Wonderware Information</i> Server Win-XML Exporter User's Guide
Defining content units	Chapter 13 of the <i>Wonderware Information</i> Server Win-XML Exporter User's Guide
Defining queries	Chapter 14 of the <i>Wonderware Information</i> Server Win-XML Exporter User's Guide
Creating displays	Chapter 15 of the <i>Wonderware Information</i> Server Win-XML Exporter User's Guide
Defining links	Chapter 16 of the <i>Wonderware Information</i> Server Win-XML Exporter User's Guide
Publishing reports	Chapter 18 of the <i>Wonderware Information</i> Server Win-XML Exporter User's Guide
Using ArchestrA reporting	Chapter 19 of the <i>Wonderware Information</i> Server Win-XML Exporter User's Guide
Creating and restoring backups	Chapter 11 of the <i>Wonderware Information</i> Server Administration Guide
Maintaining WIS	Chapter 5 of the <i>Wonderware Information</i> Server Administration Guide

Getting Technical Support

Wonderware Technical Support consists of a global team of qualified Certified Support Providers. If you have questions or concerns about System Platform, contact Wonderware Technical Support.

Telephone: U.S. and Canada

800-966-3371

7 a.m. to 5 p.m Pacific Time Outside the U.S. and Canada

949-639-8500

For local support in your language, contact a

Wonderware-certified support provider in your area or

country.

Refer to the following web address for a local

distributor or sales office in your area:

http://us.wonderware.com/aboutus/contactsales

Fax. 949-639-1545

F-mail: Customer Support Subscribers, send an e-mail

message to our priority address:

compsupp@wonderware.com

Customers without a support agreement, send an

e-mail message to:

support@wonderware.com

Web: Registered customers, submit your questions to our

Support web site.

Refer to the following web site for instructions to register for Wonderware technical support:

http://www.wonderware.com/support/web

Getting Product Training

Wonderware offers a training course for System Platform and individual courses for the products that make up System Platform. Training courses are held at our training facilities in Lake Forest, California as well as regional offices worldwide. On-site customer training programs are also available at your site.

Telephone: U.S. and Canada

866-998-7246

7 a.m. to 5 p.m Pacific Time Outside the U.S. and Canada

949-639-8508

Mail: Wonderware/Invensys Systems

26561 Rancho Parkway South Lake Forest, CA 92630 Attn: Training Department

F-mail: training@wonderware.com

Web: North America

http://us.wonderware.com/training

Latin America

http://la.wonderware.com/training

For training in your language, contact a

Wonderware-Certified Training Provider in your area or country. Refer to the following web address that lists Certified Training Providers in various countries: http://us.wonderware.com/training/instructor/

ctps others.htm

You can view Wonderware's current training schedule and register for classes at:

www.wonderware.com/training

You can also send an e-mail message or contact us by phone (949-639-8508) for more information about training fees, class length, materials, and logistics.

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