

## 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 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.

## Install Internet Information Services and ASP.NET

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).

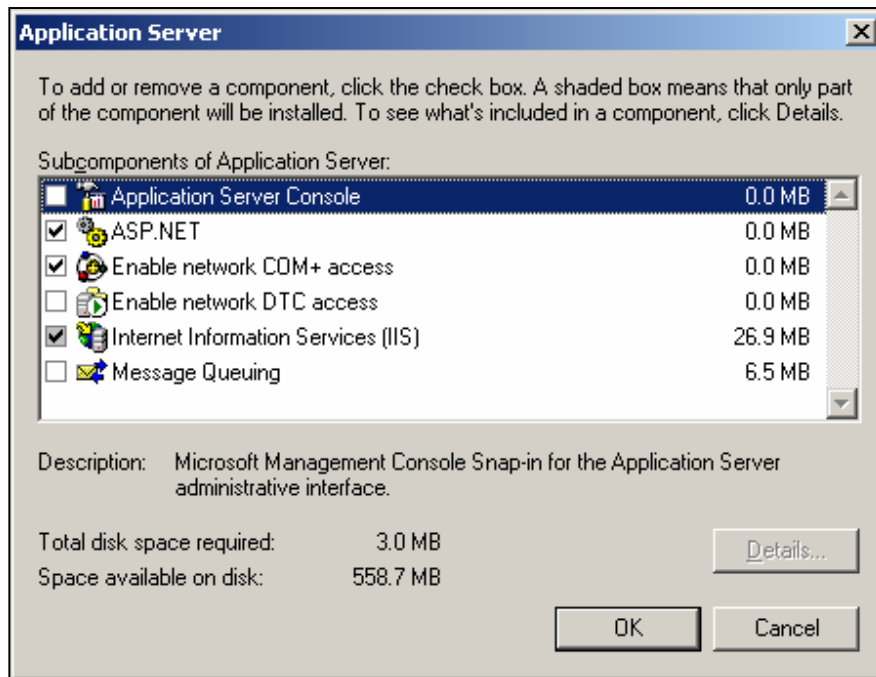


Figure 1: Application Server Details

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):

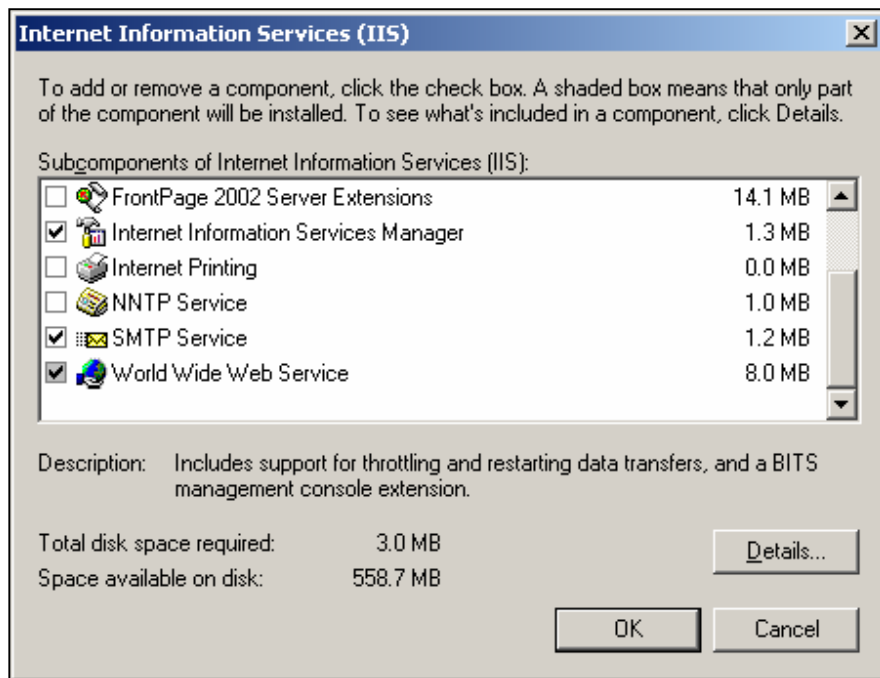


Figure 2: Internet Information Service Subcomponent Selections

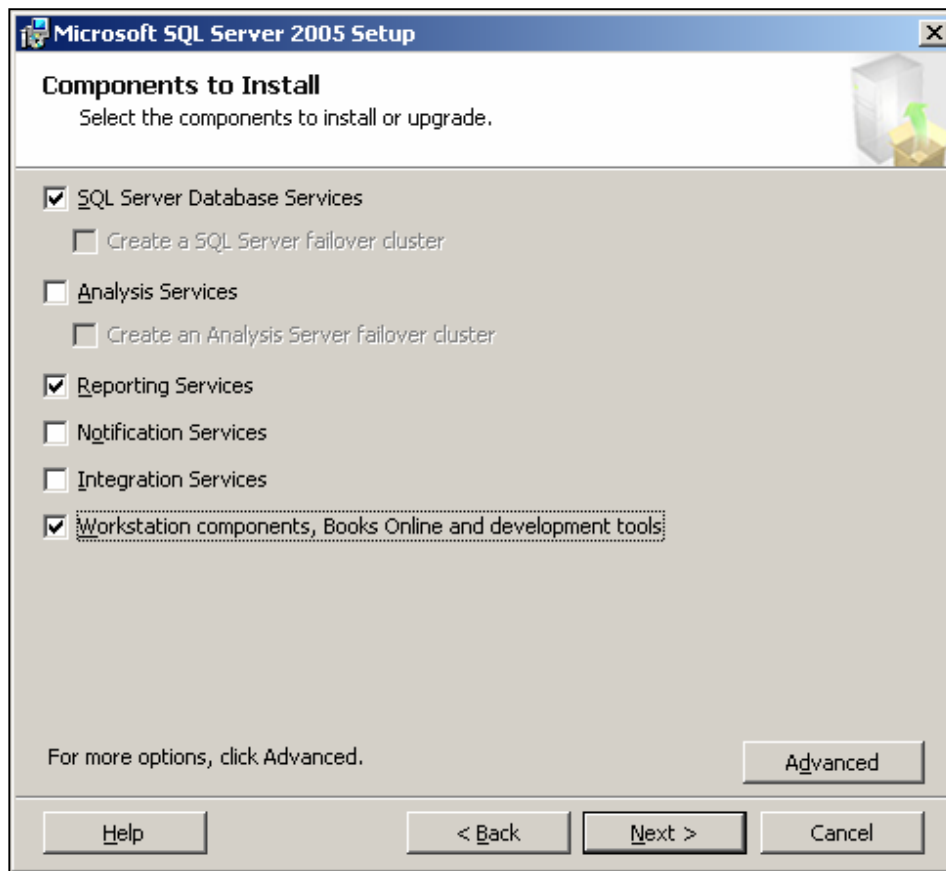
6. Press **OK** to exit the dialogs and install the selected components.

## 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.



**Figure 3: Components to Install**

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

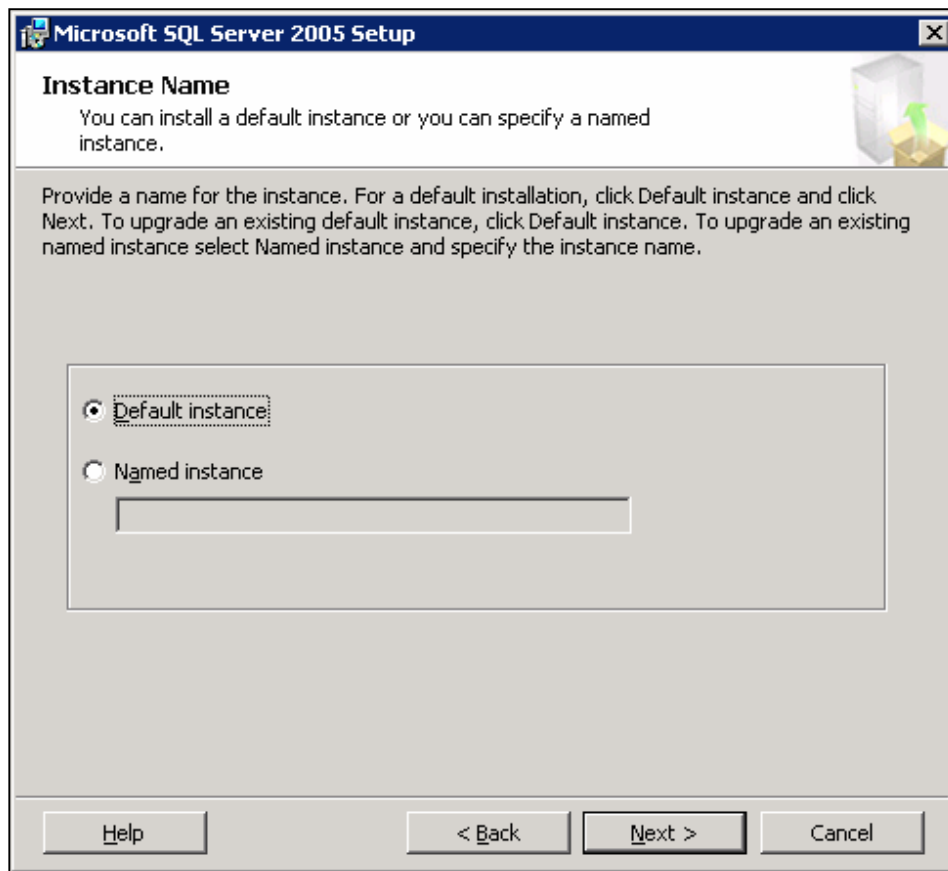
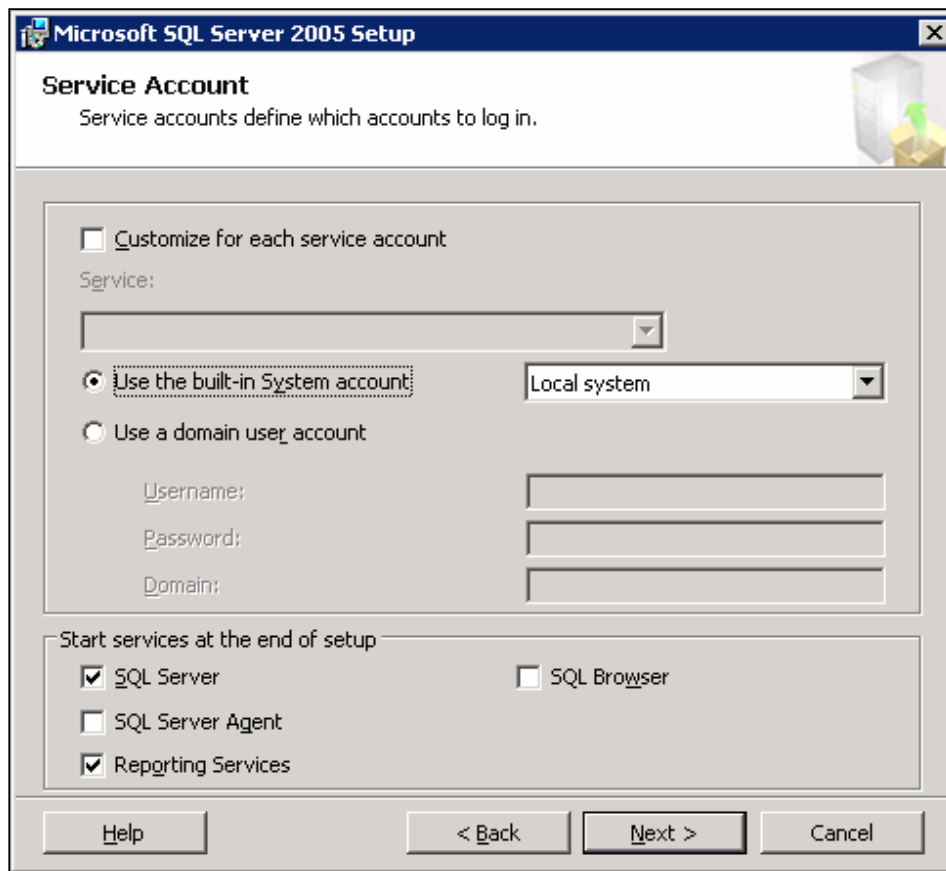


Figure 4: Default Instance

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



**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.

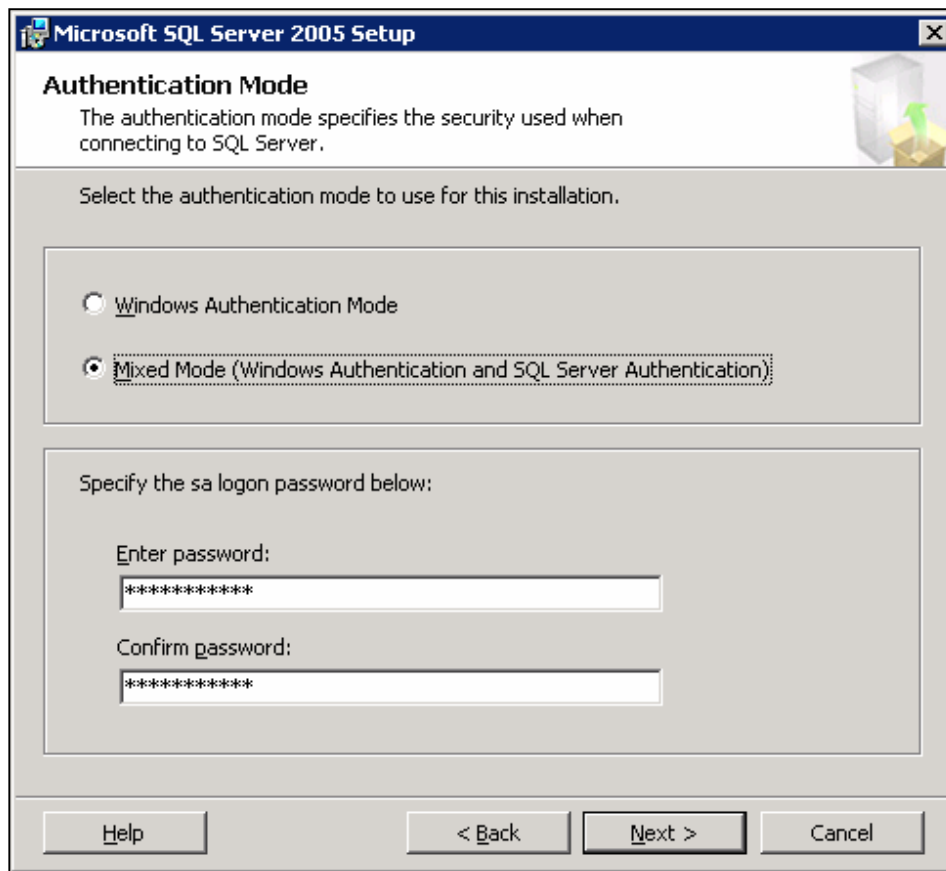
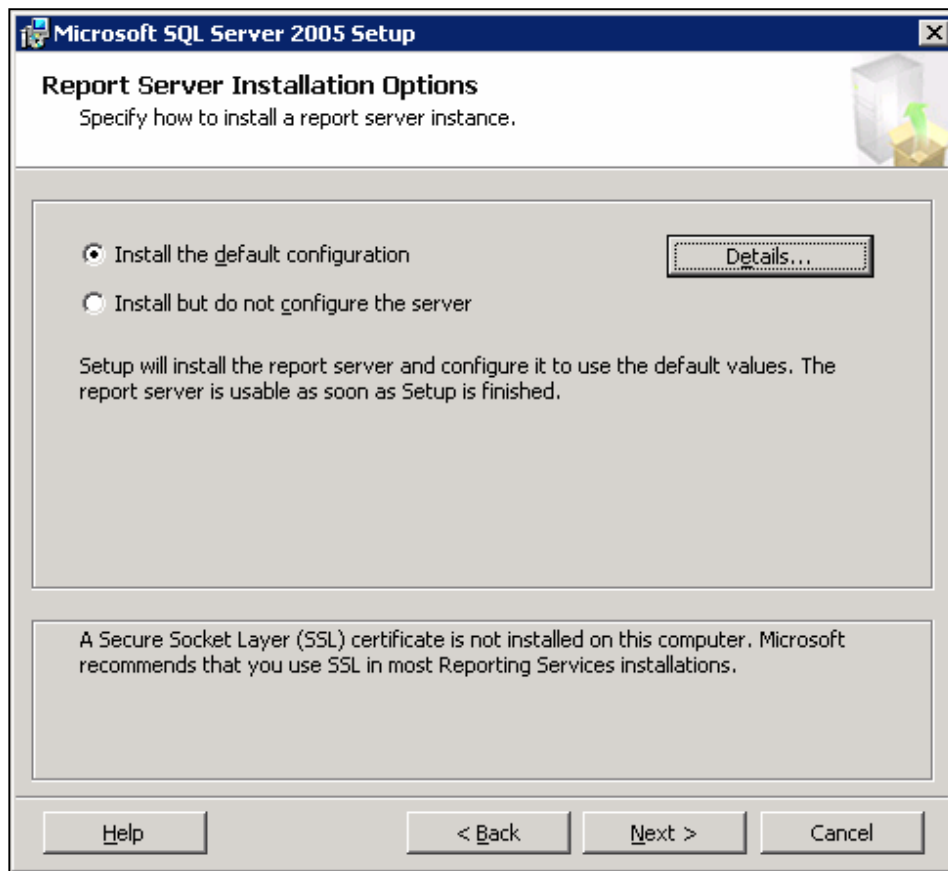


Figure 6: Mixed Mode Authentication Settings

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



**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 Refresh

- ✔ Server Status
- ✔ Report Server Virtual Directory
- ✔ Report Manager Virtual Directory
- ✔ Windows Service Identity
- ✔ Web Service Identity
- ✔ Database Setup
- ! Encryption Keys
- ☑ Initialization
- ! Email Settings
- ! Execution Account

## Report Server Status

Use the Reporting Services Configuration tool to configure a report server deployment. Click an item in the navigation pane to open a configuration page.

Use this page to start or stop the Report Server Windows service.

Instance Properties

Instance Name:	MSSQLSERVER
Instance ID:	MSSQL.2
Initialized:	Yes
Service Status:	Running

**Legend**

- ✔ Configured
- ✘ Not configured
- ! Optional configuration
- ! Recommended configuration

**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).

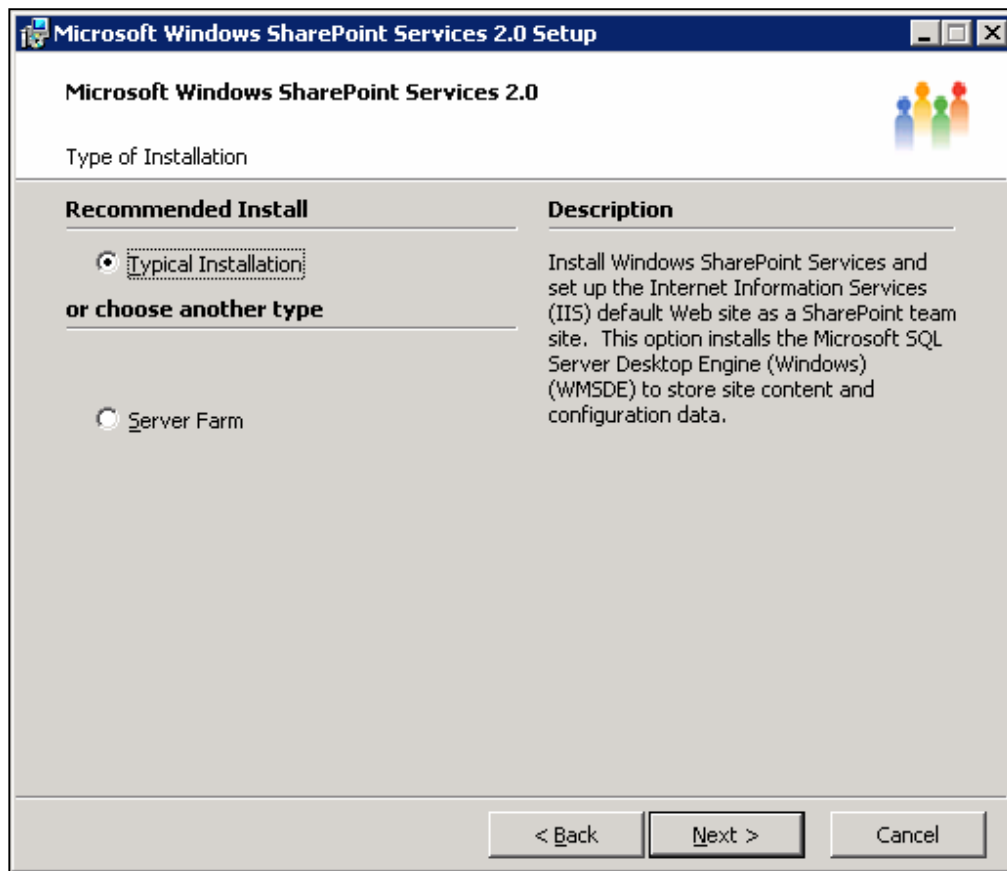


Figure 9: SharePoint Services Typical Installation Option

- 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).

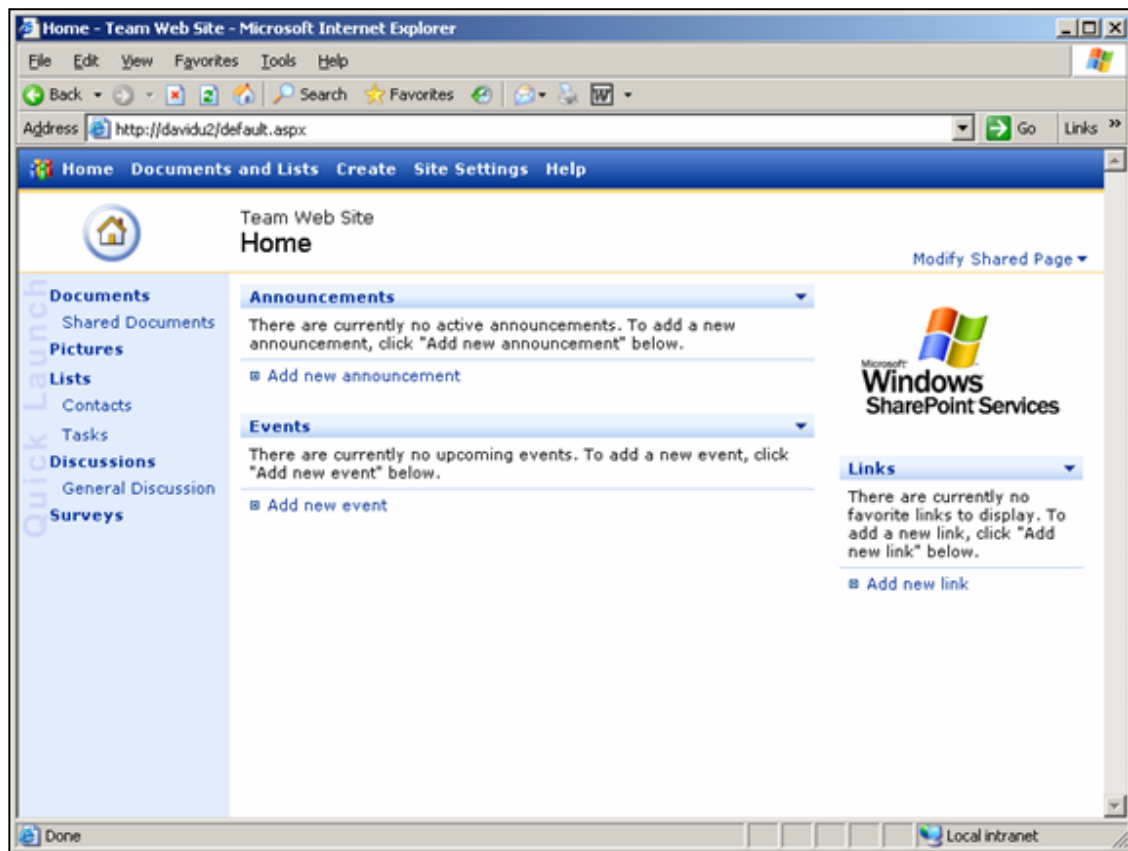


Figure 10: SharePoint Team Web Site Default Page

## 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).

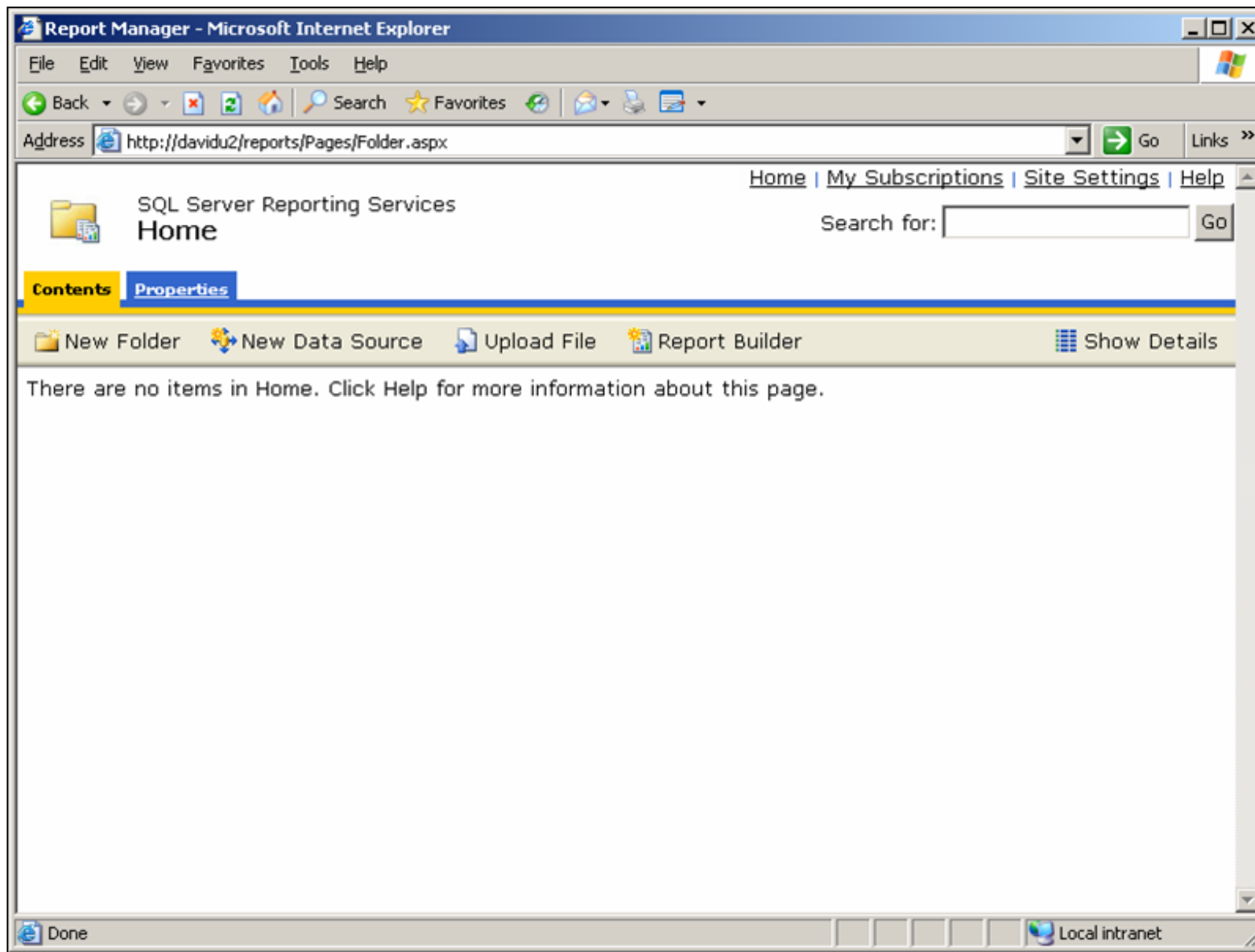


Figure 11: SQL Server Reporting Services Home Page

## 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).

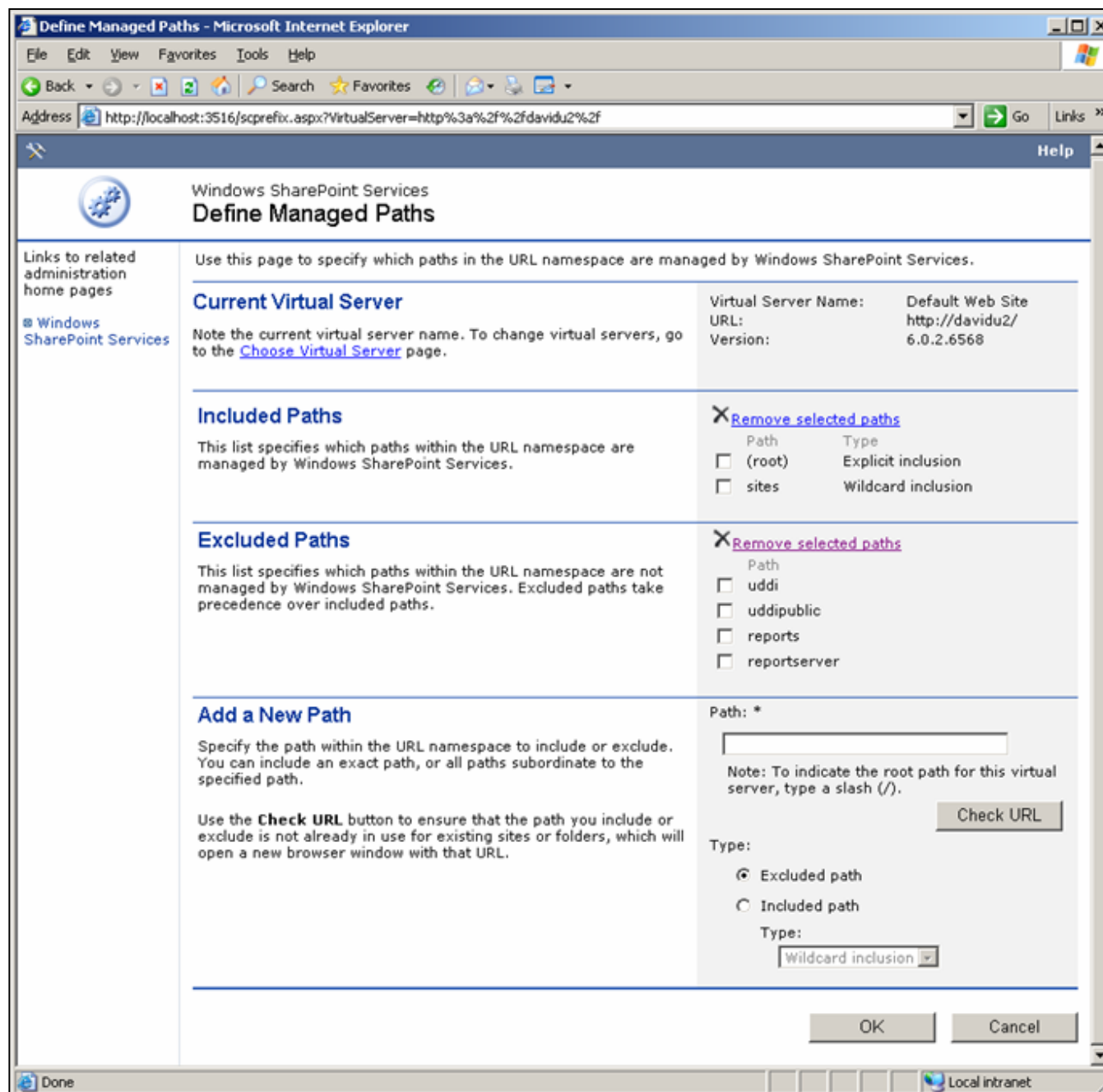


Figure 12: Define Managed Paths

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).

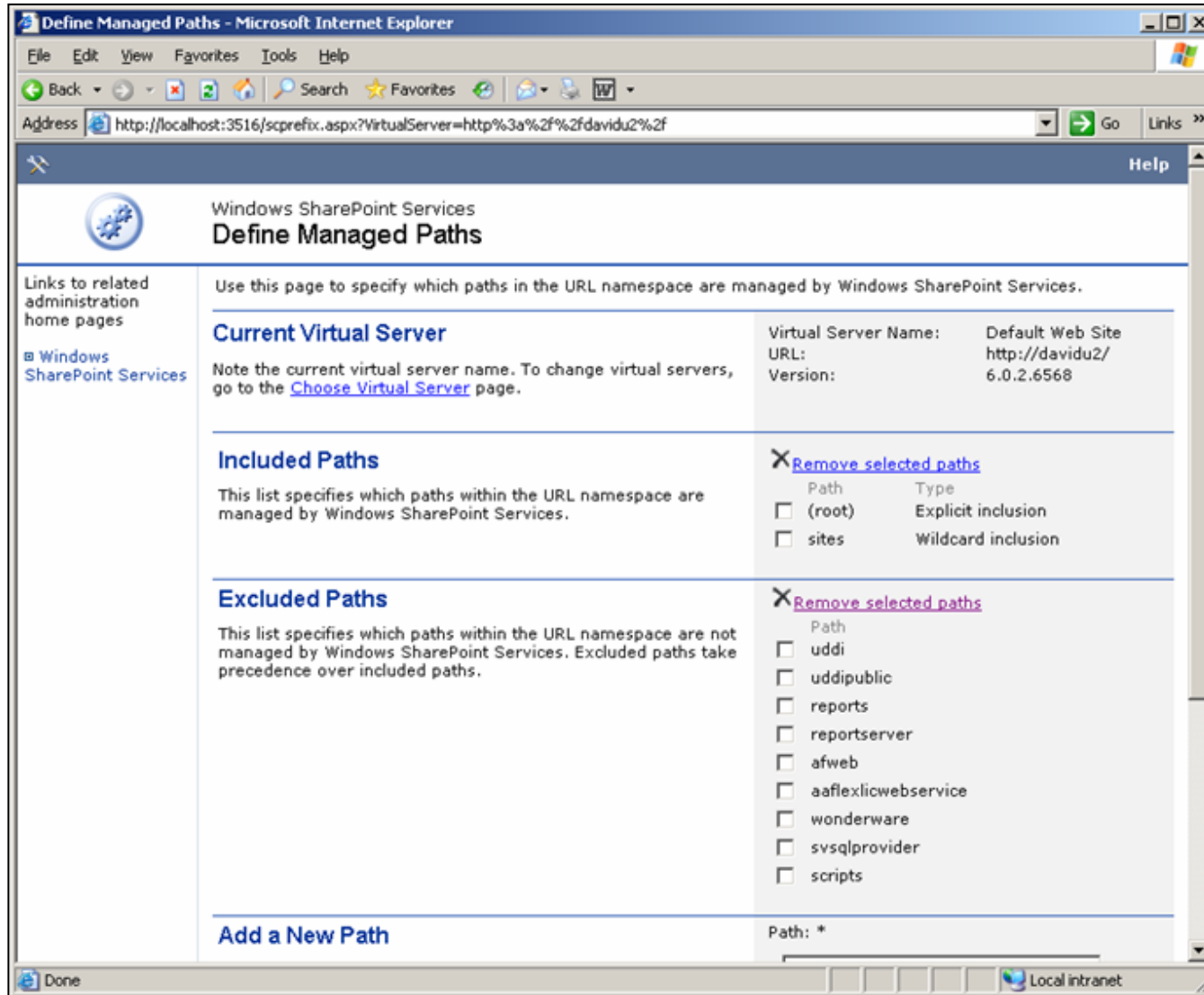


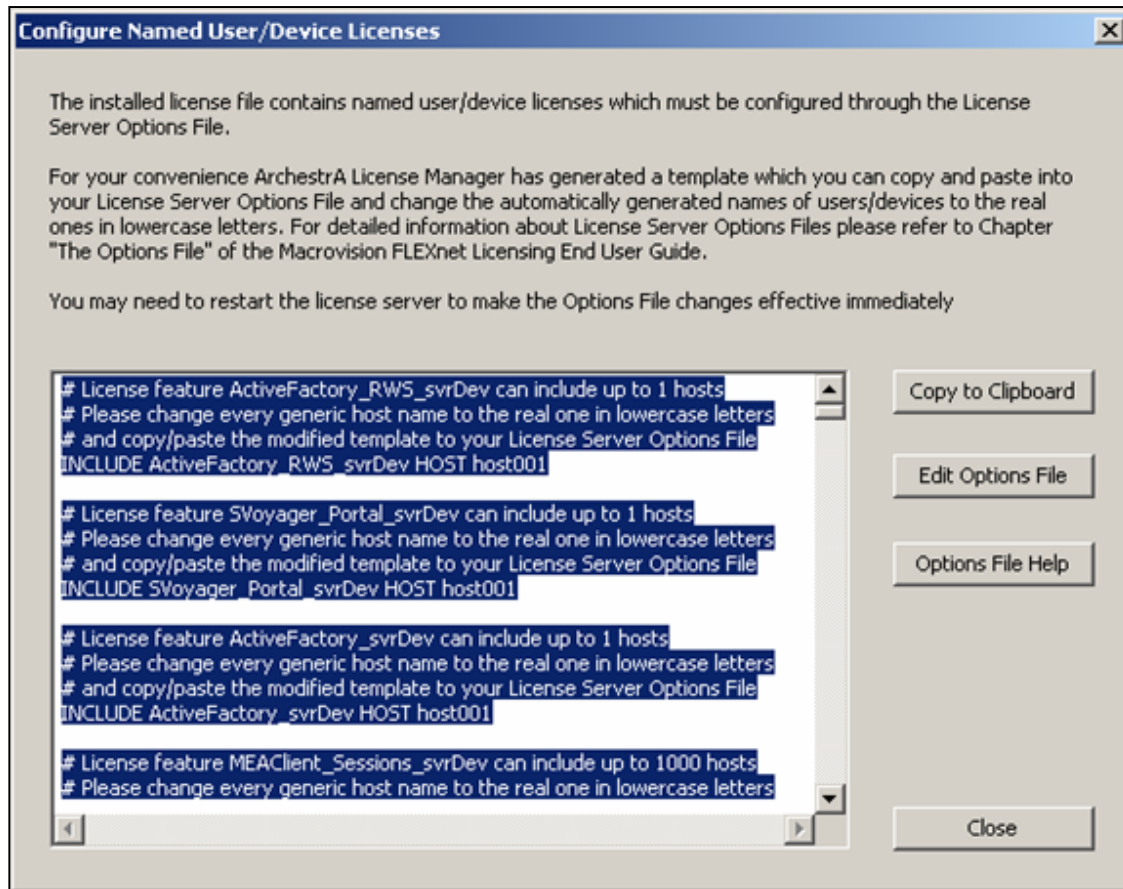
Figure 13: Added Paths Included in the Excluded Paths Section

## 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).

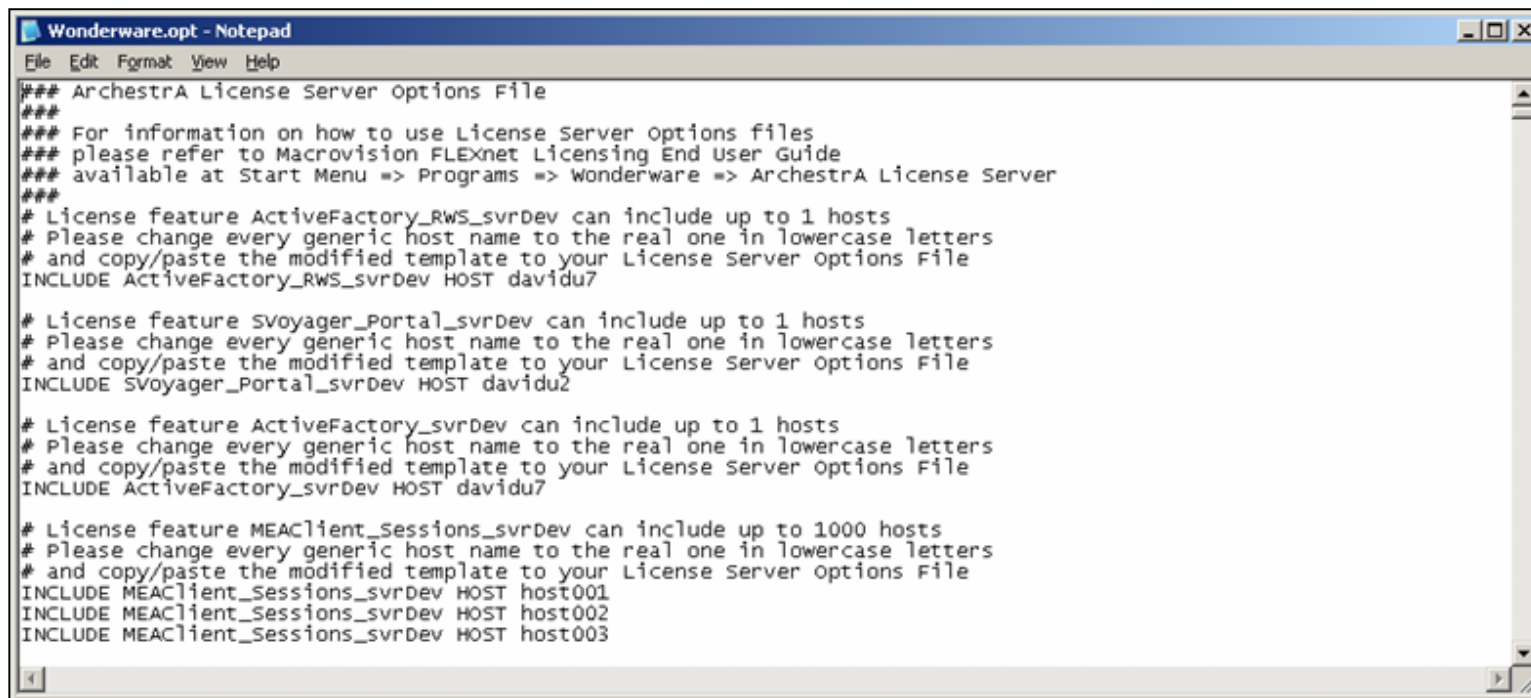


**Figure 14: Configure Named User/Device Licenses Dialog Box**

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
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_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

# 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

# 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
```

Figure 15: Edit the Wonderware.opt File

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

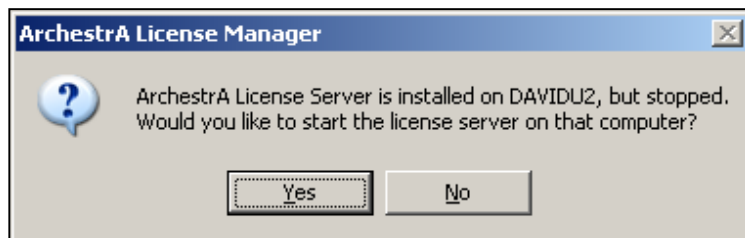


Figure 16: Start the License Server Prompt

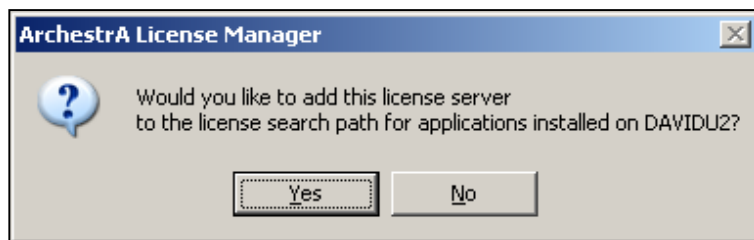


Figure 17: Add License Server Prompt



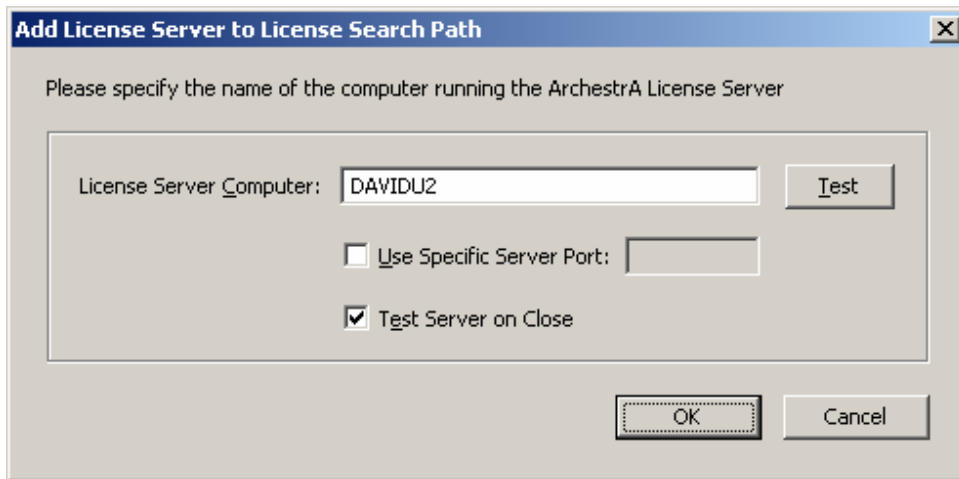


Figure 18: Specify License Search Path

The completed License Installation appears (Figure 19 below).

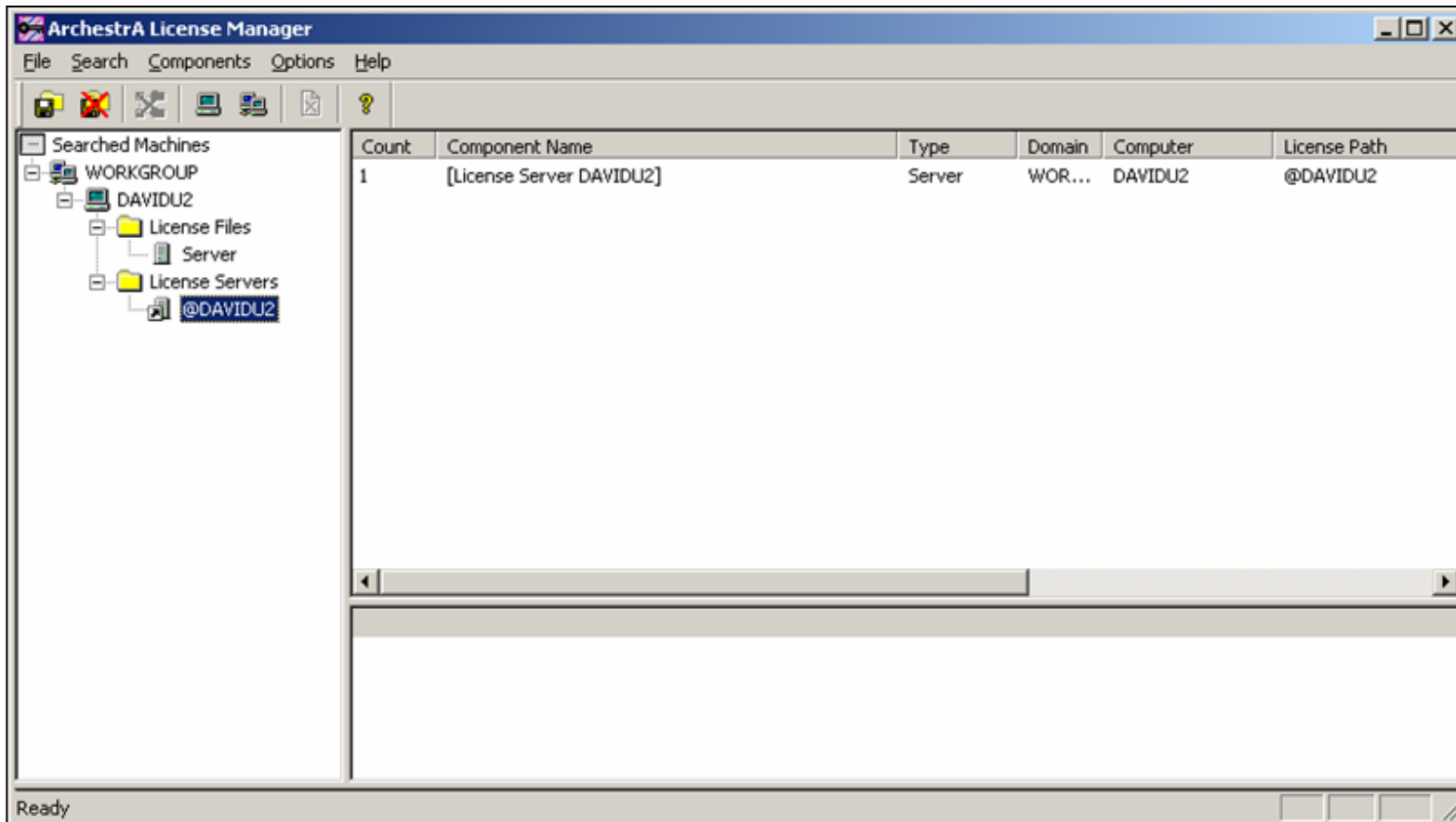
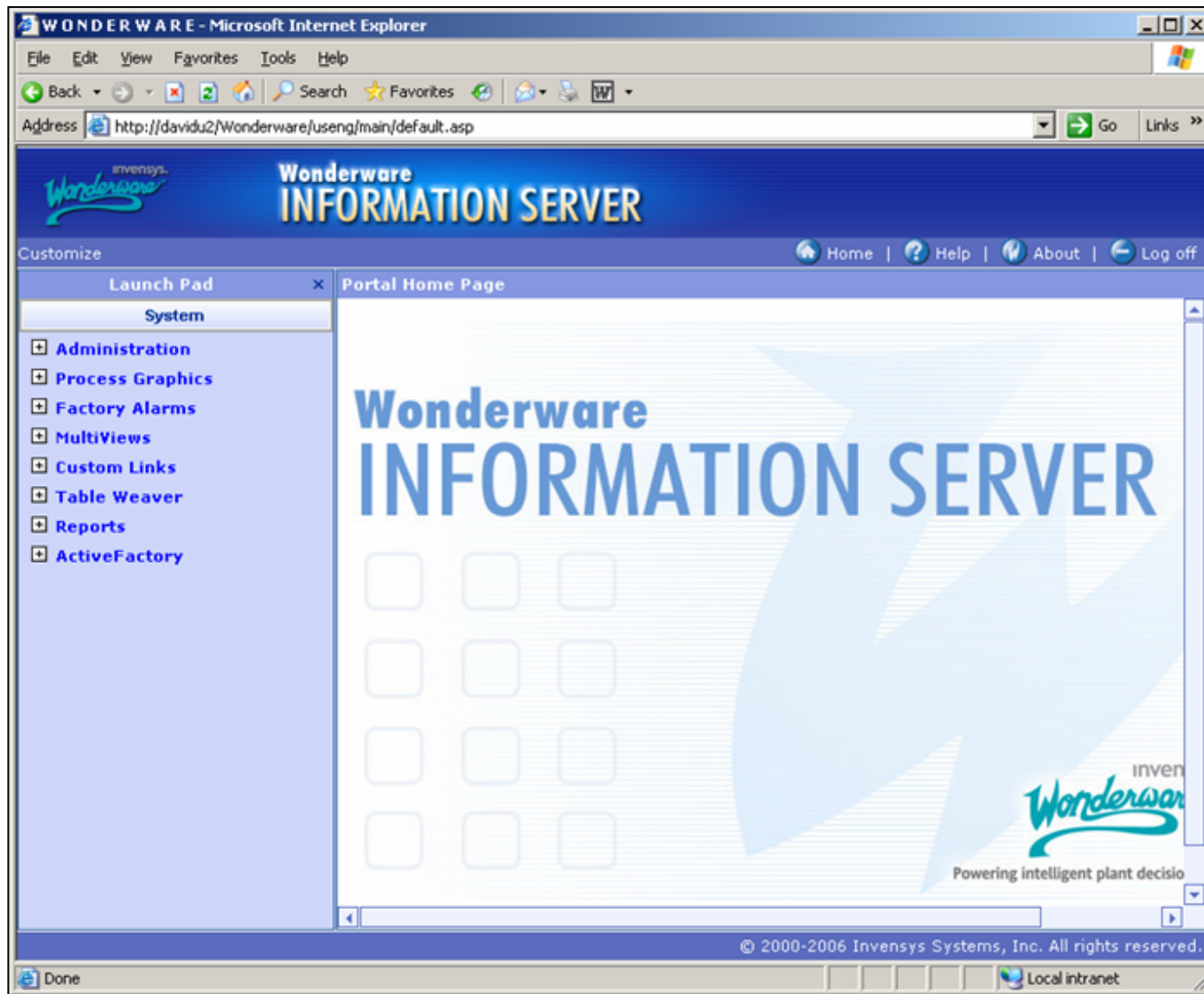


Figure 19: Completed License Installation

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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