

EyeKnow SMS Compact V2.XX

Installation Guide



CONTROLWEB

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Disclaimer

We have reviewed the contents of this publication to ensure consistency with the hardware and software described. Since variance cannot be precluded entirely, we cannot guarantee full consistency. However, the information in this publication is reviewed regularly and any necessary corrections are included in subsequent editions.

This User Manual assumes that the client has an installed and licensed EyeKnow system. See Installation Manual for more information.

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2 Introduction

EyeKnow SMS Compact is an automated alarming system that integrates seamlessly with a number of SCADA and DCS packages. It notifies the necessary people of critical events via SMS. If an on-call user cannot be contacted it will retry or escalate the alarm to ensure that the event is brought to the attention of another on-call user.

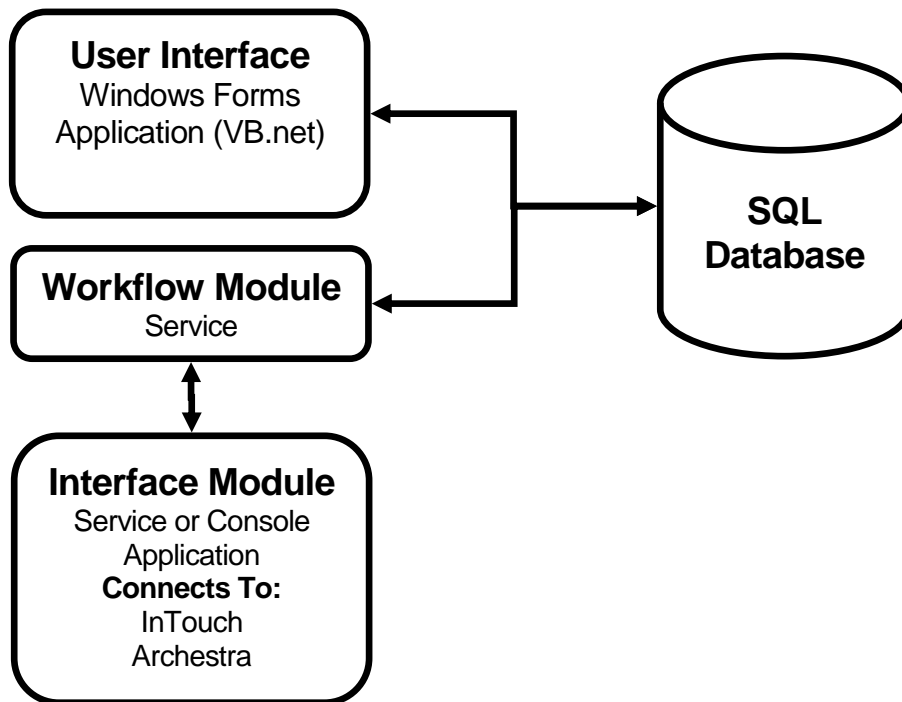
Users have the ability to acknowledge alarms, not only back into EyeKnow to stop escalation, but also right back into the native control system. EyeKnow will pick up if an alarm is acknowledged from the control system, in which case it assumes a person will respond to the alarm. EyeKnow will then stop the distribution process as if an acknowledgement has been received from an SMS user.

EyeKnow's features include:

- Easy intuitive user interface means setup is kept simple and effective
- Rich in functionality - Alarm Distribution, Acknowledgement, Scheduling and Reporting are all built into the product
- No separate database. EyeKnow queries the live SCADA/DCS database, so is always current and minimal configuration is required.
- Alarm notifications are sent out via SMS. Acknowledgements are able to be sent back into the SCADA/DCS system via EyeKnow SMS.
- Multiple alarm escalation levels. Alarms will be escalated to a higher level of support if not acknowledged within the allowed time.
- All components communicate using encryption providing a secure platform

This Installation Manual will guide you through all the steps required to install a fully functional EyeKnow system.

3 System Architecture



EyeKnow Compact consists of four separate modules as shown above. All of these modules can be installed and run on a single server, or distributed across a number of servers as required.

A typical installation has the User Interface, Workflow Module and SQL Database installed on one server, and the Interface Module installed on the server hosting the SCADA alarm provider.

4 System Requirements

The minimum requirements of these machines are:

1. Windows XP, Windows Server 2003 or Windows 7
2. 1GB of RAM
3. Microsoft .Net 3.5 SP1 framework
4. Microsoft SQL Server 2005 or 2008 for the Database.
5. 1 GHz Pentium processor or equivalent
6. Serial port on the computer hosting the Workflow Module

A serial GSM Modem will be required for SMS distribution. It is recommended that a Telit GT863 or GT864 modem be used. These devices can be connected directly to the system without additional configuration.

5 Step 1: Installing the EyeKnow Wizard

To install EyeKnow SMS Compact, the first step is to install the EyeKnow wizard. The EyeKnow wizard will allow you to easily install any EyeKnow Compact module.

Download the latest version of the EyeKnow wizard from <http://www.controlweb.co.nz/index.php/products>. Older versions can also be downloaded from there.

Note: The installation wizard should be installed on all computers which require an EyeKnow module.

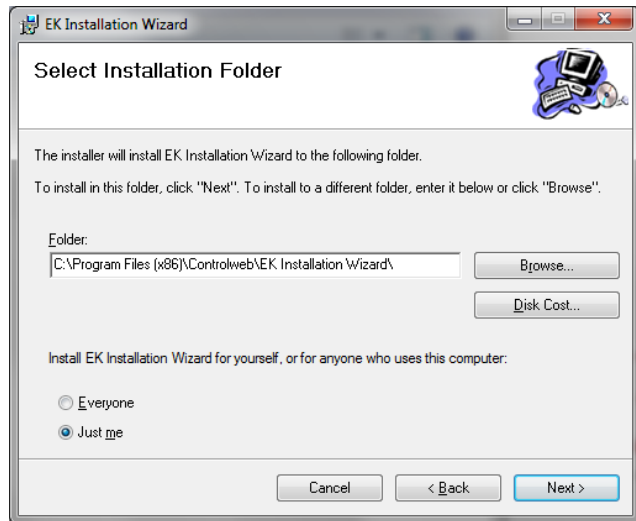
1. Download **EKInstallationWizardSetup.exe** for the web
2. Locate and run the **EKInstallationWizardSetup.exe**
3. You will be prompted through the steps of the installation.



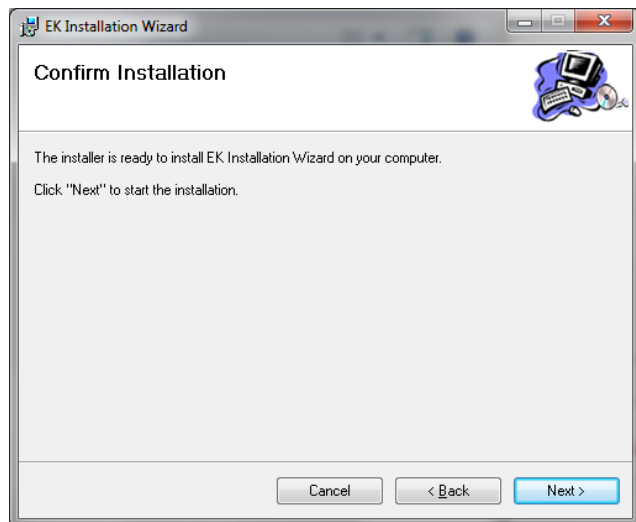
4. Please read the Licensing agreement before you select "I Agree" and continuing. If you do not agree to the Licensing Agreement, you will not be able to continue.



5. Select the directory you wish to install the EyeKnow installation wizard to. This can be a temporary location if you wish to delete the wizard after completing the EyeKnow Compact installation.



6. Press "Next" to begin installation of the wizard.



6 Step 2: Installing EyeKnow SMS Compact

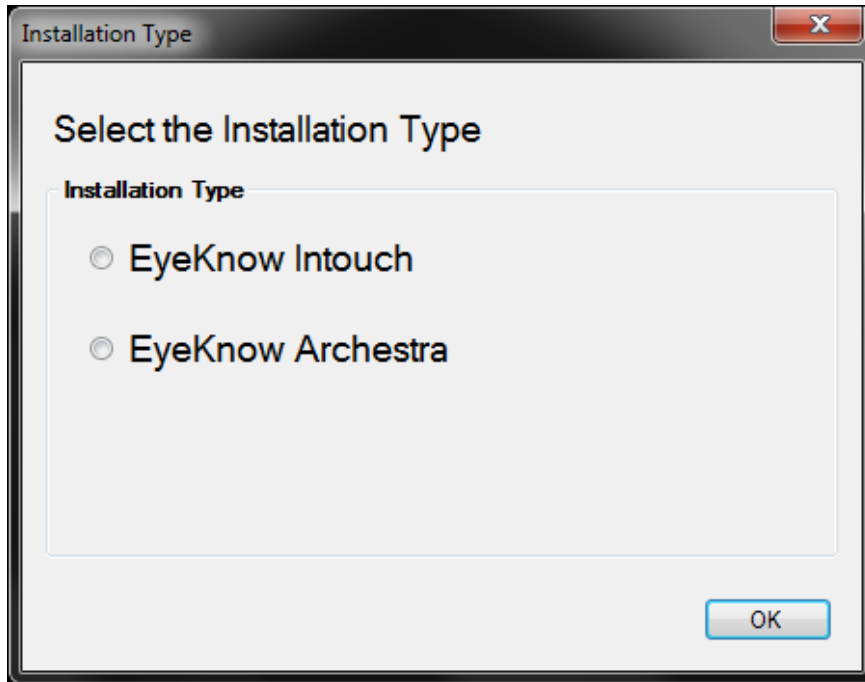
After you have completed installation of the EyeKnow wizard, locate and run the EyeKnow Installation program. The shortcut should be installed on the desktop upon completing the Installation wizard. Alternatively, you can execute **EyeKnowInstallationWizard.exe**. It can be found in the folder in which the wizard was installed.

Note: It is recommended that the database, user interface and workflow module all be installed on the same computer; however, this is not a requirement so long as the user interface and workflow modules are each able to access the database.

6.1 Step A: Selecting the Version of EyeKnow

EyeKnow is able to interface with a number of different SCADA systems. Upon start up of the EyeKnow Compact Installation wizard there will be a prompt to select the version of EyeKnow Compact you wish to install. You will be able to select from the following SCADA systems:

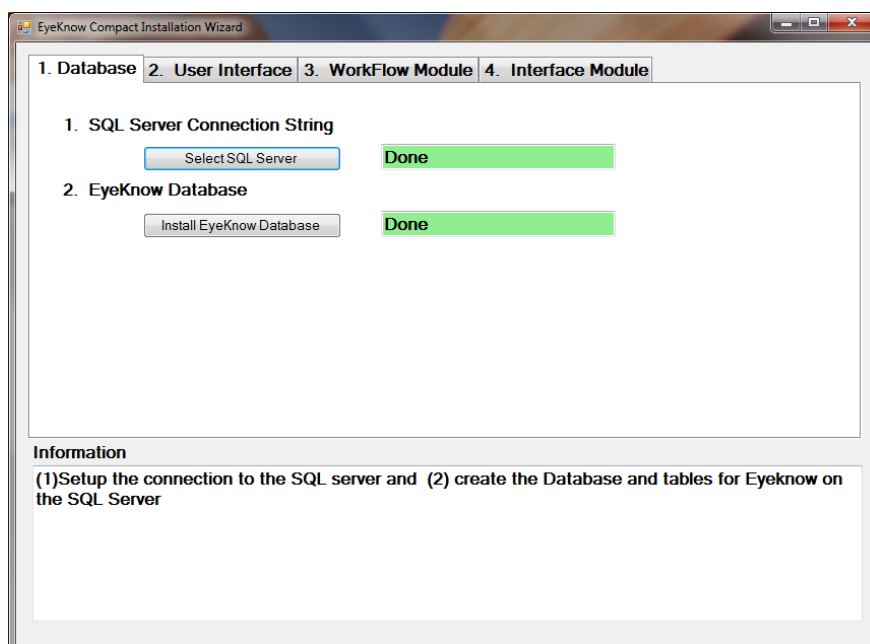
- InTouch
- Archestra



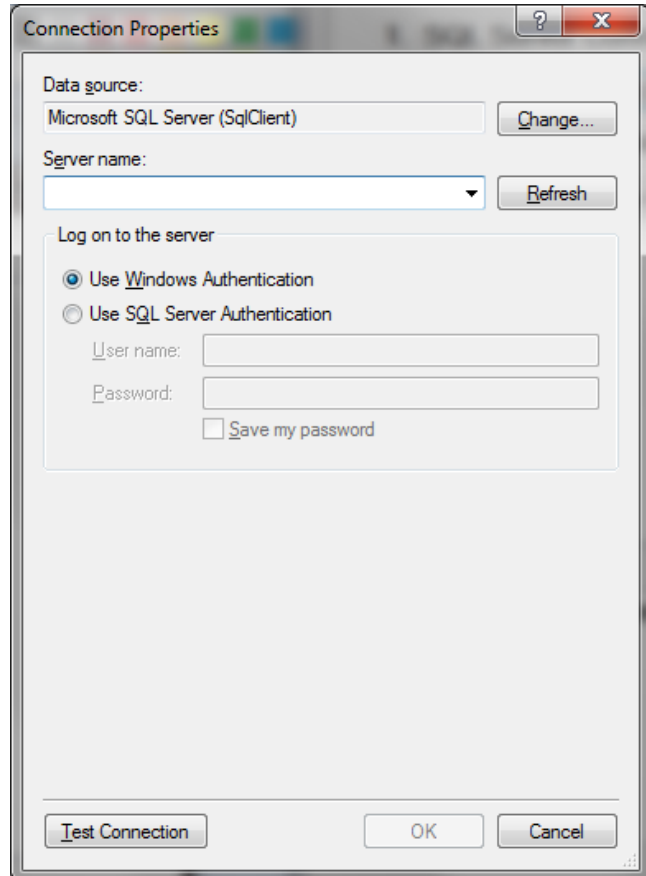
6.2 Step B: Installing the Database

Prerequisite An SQL Server on the target computer

1. The first step is to prepare an EyeKnow database. Click "Select SQL Server" to begin.



2. Select the correct data source.
3. Select the database server you wish to connect to. Existing servers will populate the drop down box automatically. Click "Refresh" if the drop down list remains empty.
4. Depending on the security of the database, "Windows Authentication" should be sufficient. If the database has its own login details, select "SQL Server Authentication" and enter the appropriate login details. **If "SQL Server Authentication" is selected it is important to select "Save my password" option.**
5. To test the validity the database settings, click "Test Connection".
6. To continue click "OK".



7. Click "Install EyeKnow Database" to create the new EyeKnow database.

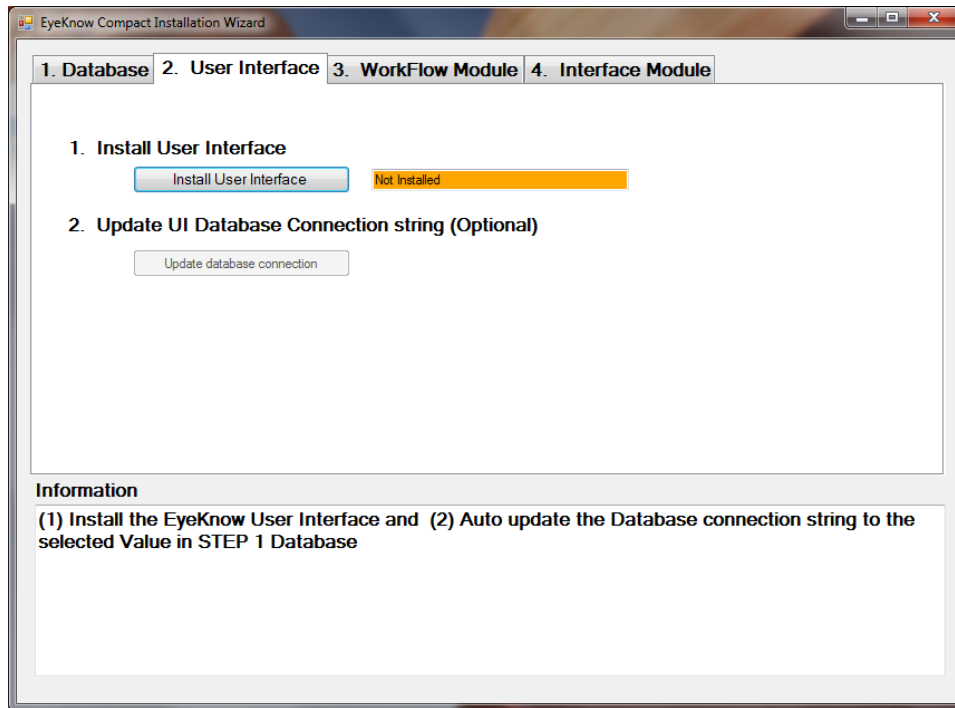
6.3 Step C: Installing the User Interface

Prerequisite The EyeKnow database must be installed before installing the User Interface

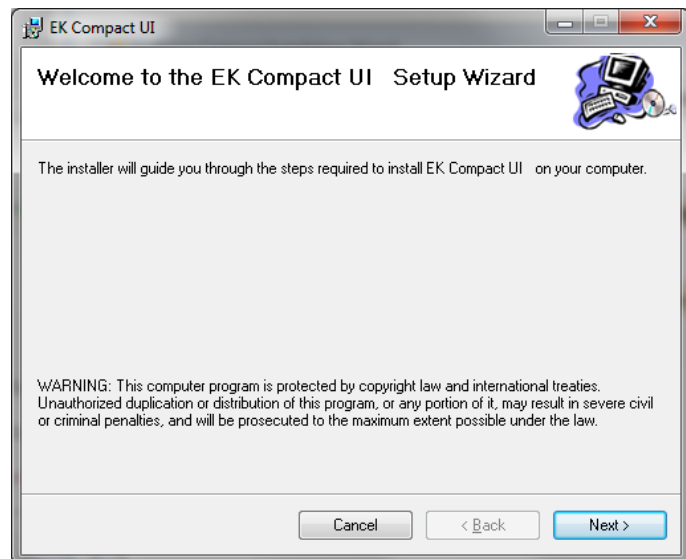
To install the user interface click "Install User Interface".

If this is the first time you are installing the EyeKnow Compact User Interface on this computer, the status to the right of the buttons should show "Not Installed" and when clicked should take you straight to the installation dialogue.

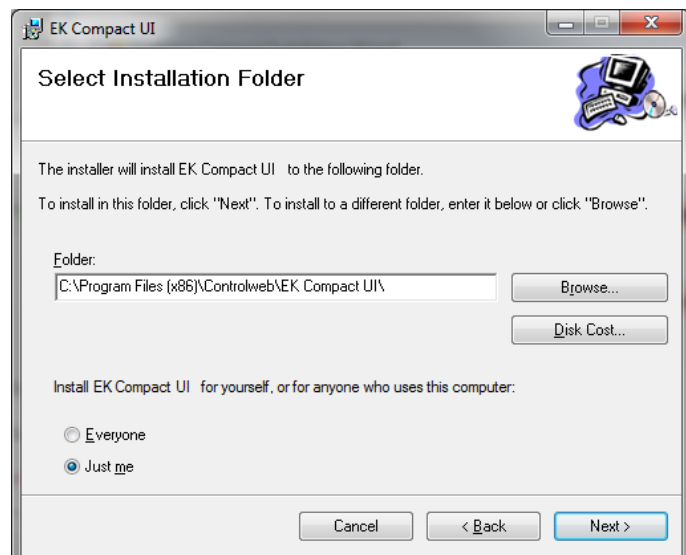
If there is currently already a version of EyeKnow Compact User Interface already installed on this computer, a different dialogue will show up displaying options to remove or repair the currently installed user interface.



1. Upon clicking "Install User Interface". The user interface installation should begin. Click "Next" to continue.



2. Select a directory you wish to install the user interface to. Click "Next" to continue.



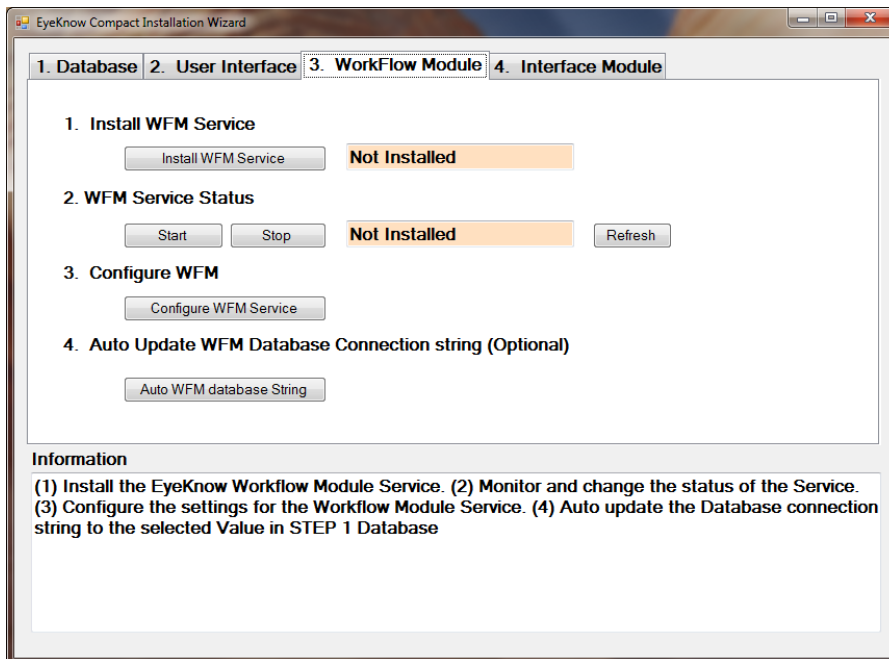
6.4 Step D: Installing the Workflow Module

Prerequisite The Workflow module can only be installed after completing the database and user interface installations

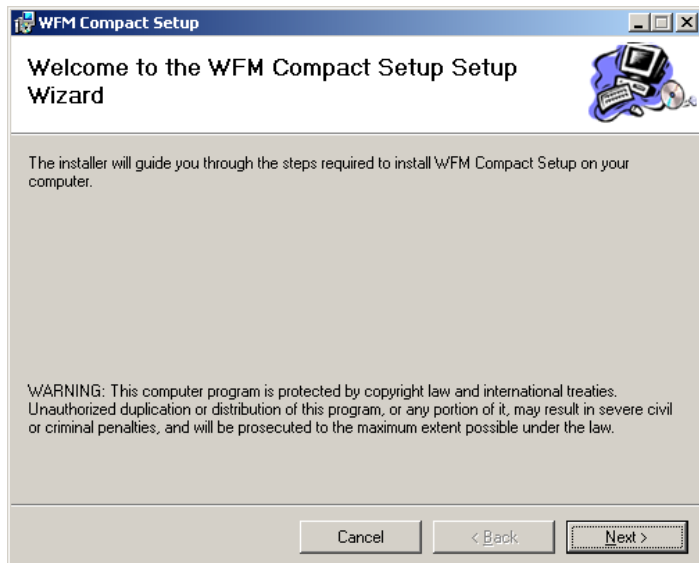
1. To install the Workflow module click "Install WFM Service".

If this is the first time you are installing the EyeKnow Compact Workflow Module on this computer, the status to the right of the buttons should show "Not Installed" and when clicked should take you straight to the installation dialogue.

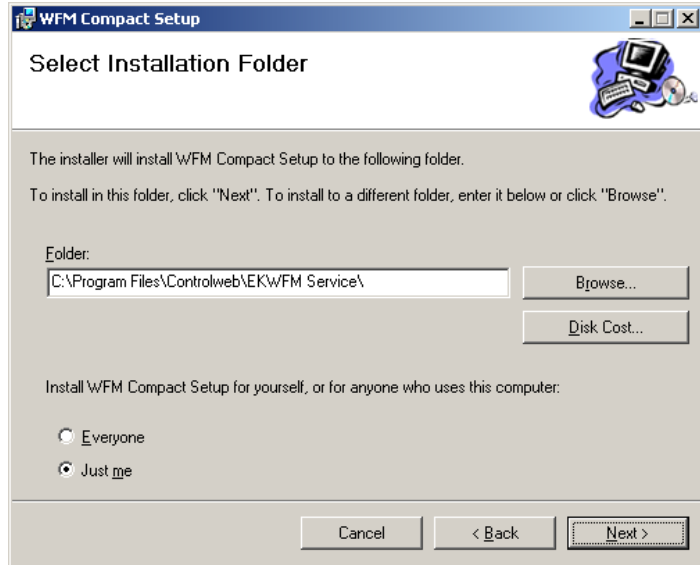
If there is currently already a version of the EyeKnow Compact Workflow Module installed on this computer, a different dialogue will show up displaying options to remove or repair the currently installed workflow module.



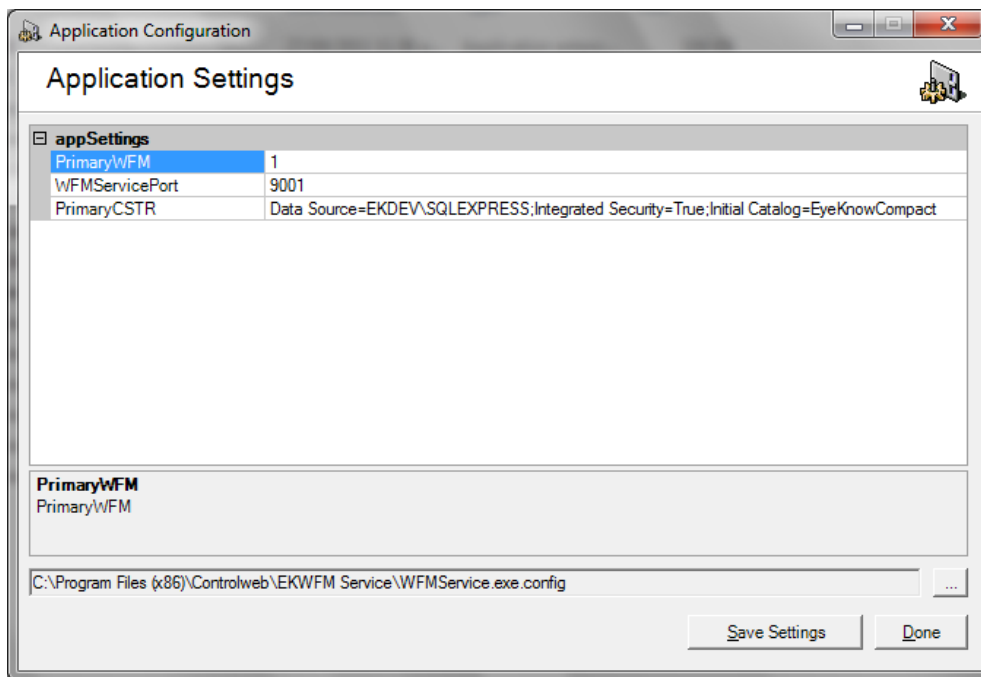
2. Click "Next to Continue.



3. Select a directory you wish to install the workflow module to. Click "Next" to continue.



4. To complete the installation, details for the workflow modules may need to be set.



PrimaryWFM - Sets the current workflow module to be the primary. The EyeKnow Compact does not have secondary workflow modules so this should always be set to 1. Default 1.

PrimaryCSTR - Primary connection string. Points to the correct database. This should not be changed as the wizard populates it automatically. It is recommended that you do not manually adjust this.

WFMSERVICEPORT - Sets the network port the WFM will communicate through. Default 9001

5. The WFMSERVICE can be started or stopped immediately from the installation screen by clicking the WFM Status "Start" and "Stop" buttons.

6. You can automatically update the connection string, discussed previously, by clicking "Auto WFM Connection String". This will automatically link the database you previously setup to the workflow module.

6.5 Step E: Installing the Interface Module

Before proceeding please confirm which Interface Module you wish to install. This will depend on the type of SCADA system you are monitoring.

6.5.1 InTouch Interface Module

Normally the interface module will reside on the computer that runs the control system alarm provider.

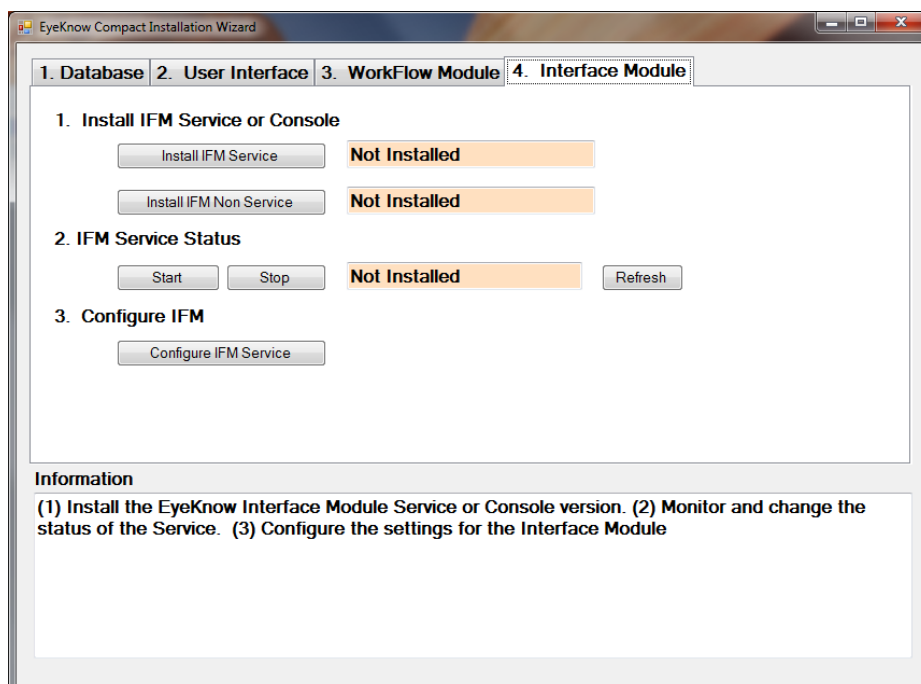
1. To install the Interface module click "Install IFM Service".

If this is the first time you are installing the EyeKnow Compact Interface Module on this computer, the status to the right of the buttons should show "Not Installed" and when clicked should take you straight to the installation dialogue.

If the Interface Module is to be run as a service, it is necessary to set the "Allow service to interact with desktop" option for the service. Details on how to do this is in Section 7 - Configuring IFM service to allow interact with Desktop"

Alternatively, you are able to install the interface module as a console application by selecting "Install IFM Non Service". Depending on your system configuration, this may be required. Please note that in this mode a shortcut to the Interface Module is placed in the Startup folder, and is executed automatically upon a user logging in to Windows.

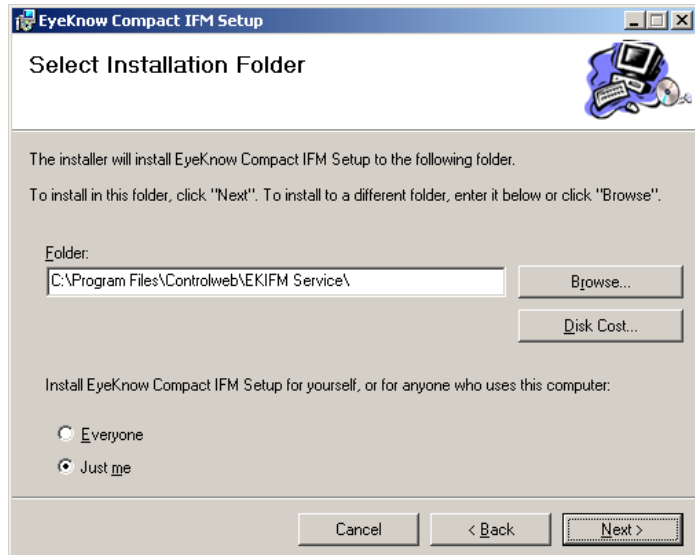
If there is currently already a version of EyeKnow Compact Interface module already installed on this computer, a different dialogue will show up displaying options to remove or repair the currently installed workflow module.



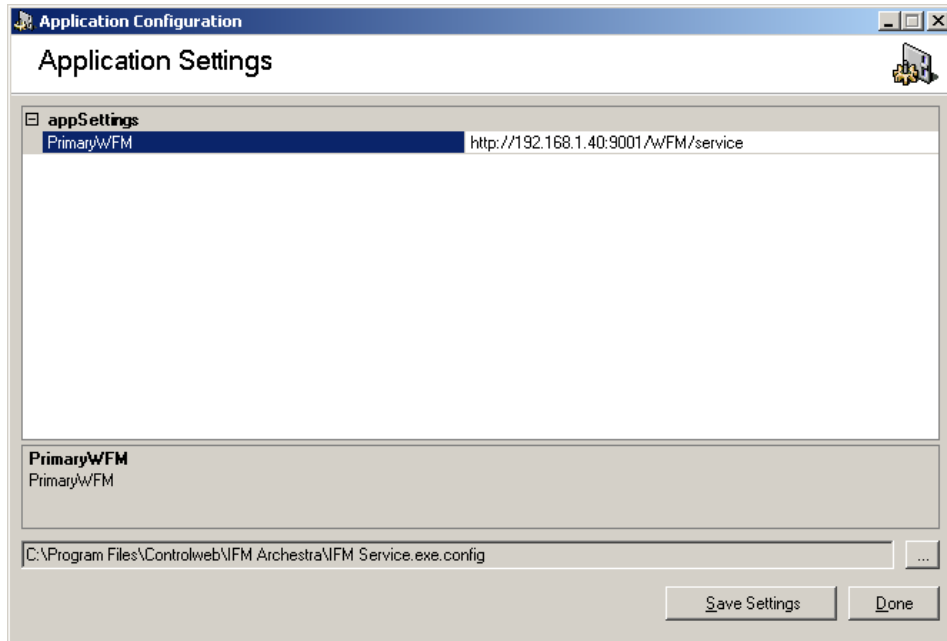
2. Click "Next" to continue.



3. Select a directory you wish to install the workflow module to. Click "Next" to continue.



- To complete the installation, details for the workflow modules may need to be set.



PrimaryWFM - Sets the network location of the workflow module. This can either be computer name or IP address of the PC. Default <http://localhost:9001/WFM/service>.

- The IFMService can be started or stopped immediately from the installation screen by clicking the IFM Status "Start" and "Stop" buttons.

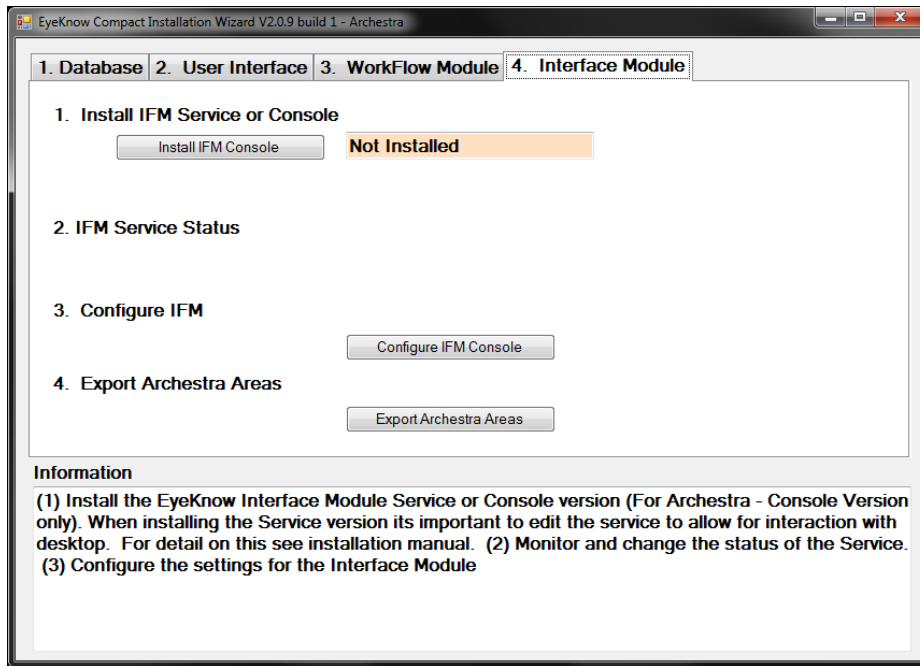
6.5.2 Archestra Interface Module

Normally the interface module will reside on the computer that runs the control system alarm provider.

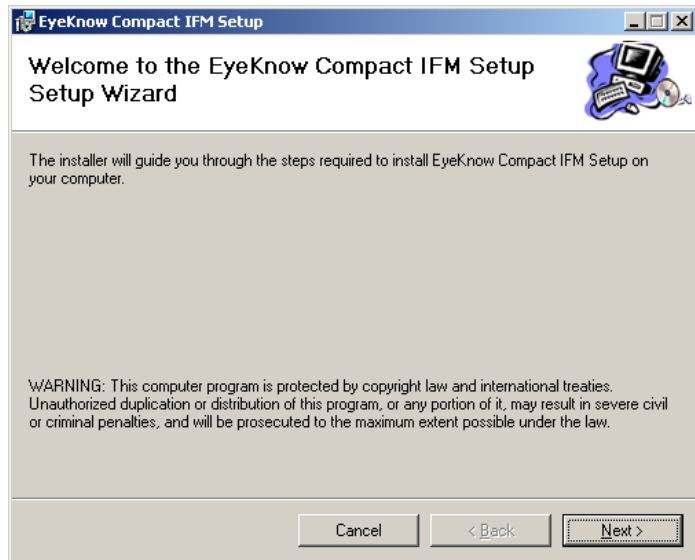
- The Archestra IFM can only be installed as a console application.

To install the Archestra interface module (IFM) as a console application, select "Install IFM Console". Please note that by installing the IFM console application, an IFM short cut will be automatically copied into Windows' startup folder.

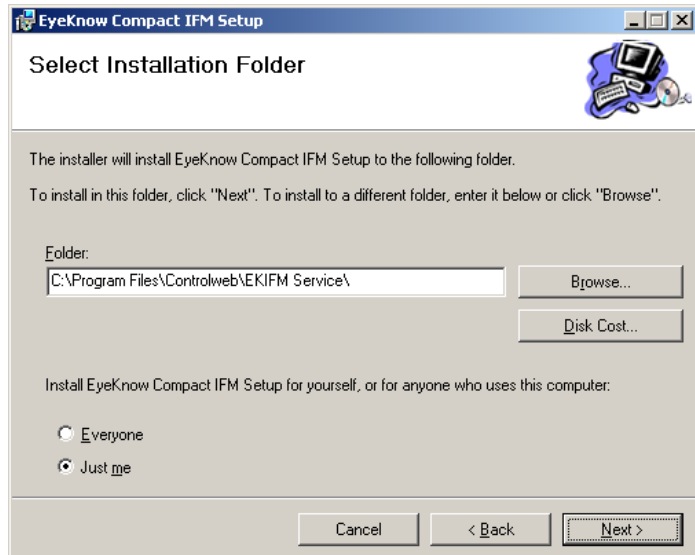
If there is already a version of EyeKnow Compact Interface module installed on this computer, a different dialogue will show up displaying a options to remove or repair the currently installed workflow module.



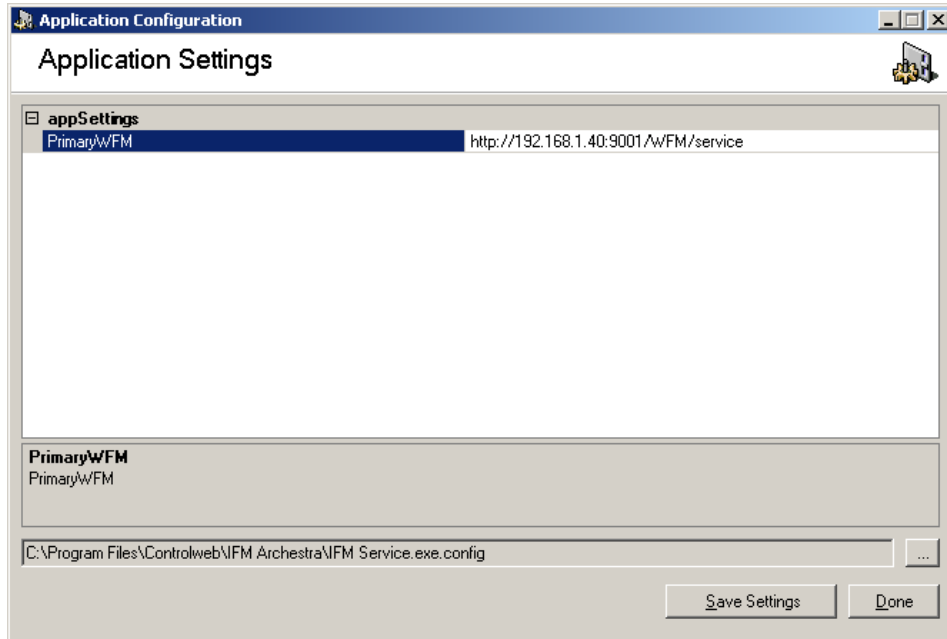
2. Click "Next" to continue.



3. Select a directory you wish to install the workflow module to. Click "Next" to continue.



4. To complete the installation, details for the workflow modules may need to be set.



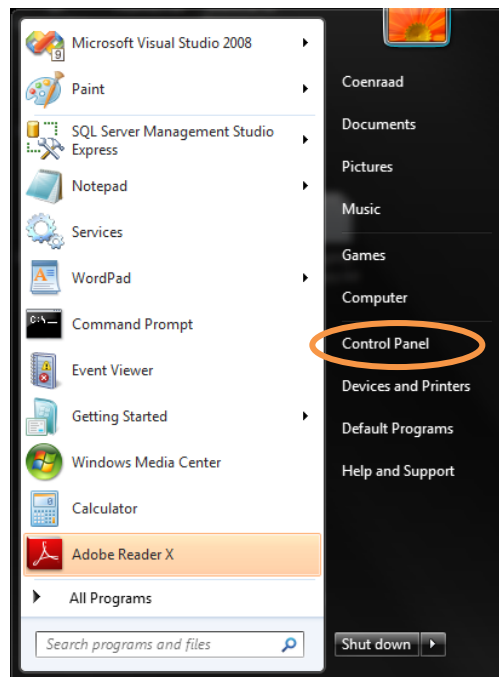
PrimaryWFM - Sets the network location of the workflow module. This can either be computer name or IP address of the PC. Default <http://localhost:9001/WFM/service>.

5. The IFMService can be started or stopped immediately from the installation screen by clicking the IFM Status "Start" and "Stop" buttons.

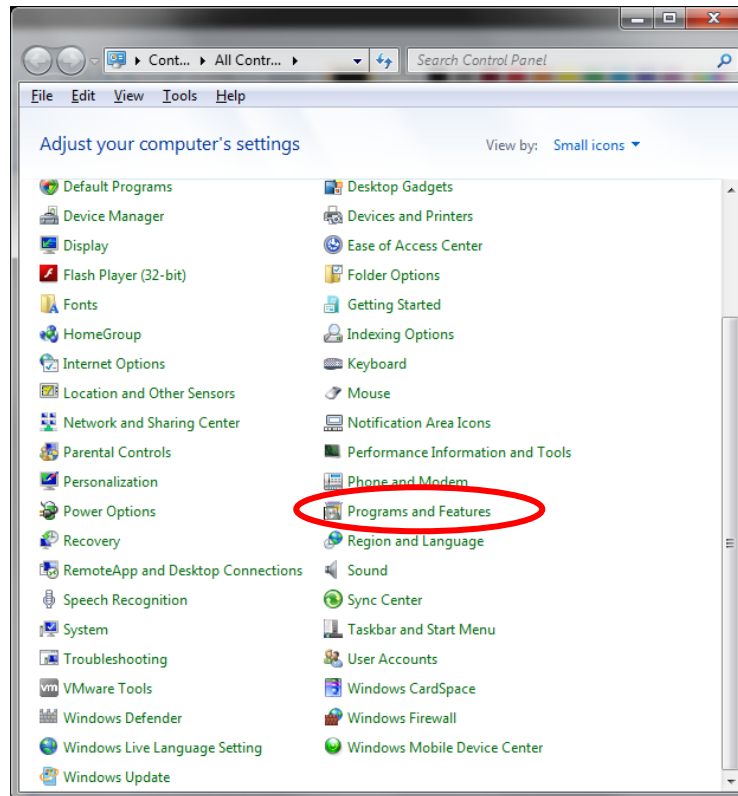
7 Uninstalling EyeKnow Compact

7.1 Uninstalling the EyeKnow Wizard

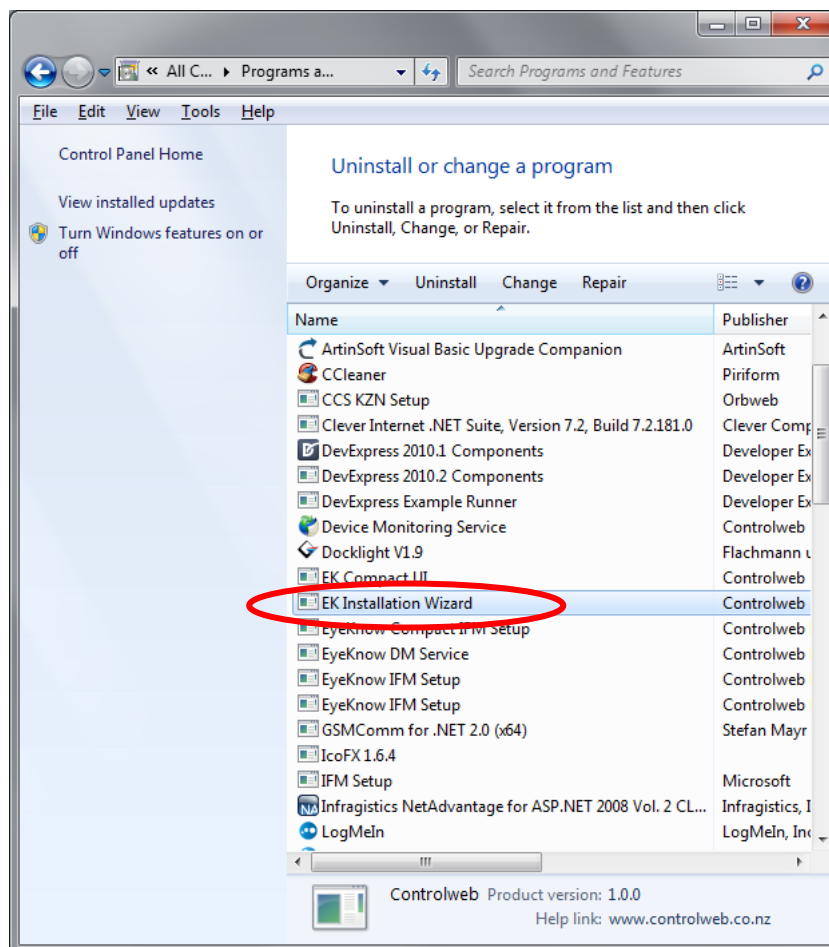
1. Click the "Start" button
2. Click "Control Panel"



3. Click "Programs and Features" (Windows Vista, 7) or "Add and Remove Programs" (Windows XP, Server 2003)



4. Locate and select "EK Installation Wizard".

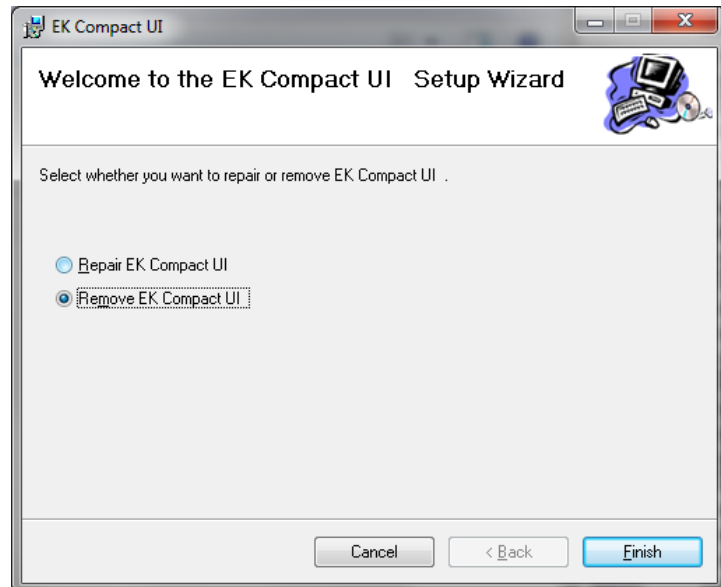


5. Right click and click "Uninstall" or select Uninstall in the top toolbar. (Windows Vista, 7). Or click "Remove" (Windows XP, Server 2003)

Note: The User Interface and Workflow Module and Interface Module can all be uninstalled using this method.

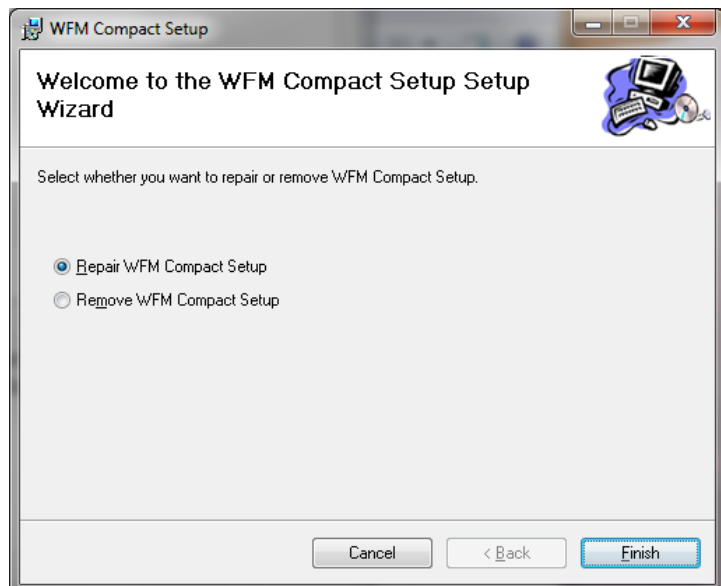
7.2 Uninstalling the User Interface

1. If there is a User Interface already installed, clicking "Install User Interface" will bring up the uninstall wizard. From the uninstall wizard you will be able repair or uninstall the User Interface.
2. Select the operation you wish to perform and click "Finish". The wizard will then perform the selected task.
3. Alternatively, the UI can be manually uninstalled from Windows' programs list (*EK Compact UI*) refer to 7.1



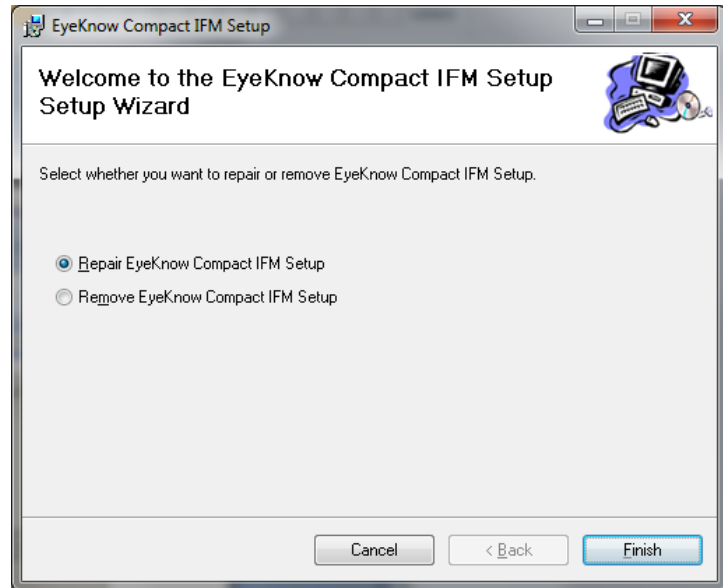
7.3 Uninstalling the Workflow Module

1. If there is a User Interface already installed, clicking "Install WFM Service" will bring up the uninstall wizard. From the uninstall wizard you will be able repair or uninstall the Workflow Module.
2. Select the operation you wish to perform and click "Finish". The wizard will then perform the selected task.
3. Alternatively, the WFM can be manually uninstalled from Windows' programs list (*WFM Compact Setup*); refer to 7.1



7.4 Uninstalling the Interface Module

1. If there is an Interface Module already installed, clicking "Install IFM Service" will bring up the uninstall wizard. From the uninstall wizard you will be able repair or uninstall the Interface Module.
2. Select the operation you wish to perform and click "Finish". The wizard will then perform the selected task.
3. Alternatively, the IFM can be uninstalled manually from Windows' programs list (*EyeKnow Compact IFM Setup*); refer to 7.1



Note: Depending on what version of the IFM is installed (service or non service), you will need to run the appropriate uninstall wizard.

8 Configuring the IFM service to interact with Desktop

1. Open the management console for services, by selecting start > run and entering services.msc. Right click on the IFMService and select properties. Open the Log On tab and tick the "Allow service to interact with desktop" option. Press OK and restart the service.

