



# **PowerMAN Enterprise Server 5.3**

## **Installation and Administration Guide**

Release 5.3.0 September 2014

## About Data Synergy



Data Synergy is a British company based in Sheffield. We have over fifteen years' experience developing and supporting software solutions for enterprise PC deployment and management. We do not resell other vendors' products and do all of our development, sales and support from our UK base.

Our products have evolved through listening to customer ideas and applying our unrivalled knowledge of PC internals. If you have a suggestion for a new product or feature we would love to talk to you.

**Data Synergy UK Ltd**  
Cooper Buildings  
Sheffield Technology Parks  
Arundel Street  
Sheffield  
S1 2NS

Website: [www.datasynergy.co.uk](http://www.datasynergy.co.uk)  
Email: [sales@datasynergy.co.uk](mailto:sales@datasynergy.co.uk)  
Telephone: 08456 435 035

Registered in England and Wales  
Company Number 06682095  
VAT Registration GB 939 7559 56

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## PowerMAN Enterprise Server Installation and Administration

### Overview

PowerMAN Enterprise Server (PMES) complements the PowerMAN client software by giving you powerful, organisation-wide, reporting of PC energy usage, costs and waste. The PowerMAN Enterprise server software, which is identical to that used for Data Synergy's hosted reporting service, provides your organisation with its own **private** reporting platform.

The reporting system is optional – the PowerMAN client software will function fully without it. However, the reports can be extremely useful to monitor the on-going effectiveness of your PowerMAN installation and determine where further improvements can be made.

There are several reasons you may want to run your own reporting platform:

- **More cost effective** - PMES is more cost effective for larger organisations (typically with more than 5,000 computers)
- **Internal security requirements** – It is normally impractical for police forces, central government or the military to use the hosted service
- **Integration** – Running your own reporting platform allows your organisation to integrate your own MIS systems with the raw data for added business benefit

This document explains how PMES operates and provides a full walkthrough installation. The instructions below are intended for a system / network administrator with experience of Microsoft Windows Server configuration and security, Internet Information Services (IIS) and Microsoft SQL Server (MSSQL). This document is not a training course on these technologies – it is assumed that the reader is already familiar with these products. Data Synergy can support any organisation with the appropriate skills but cannot, unfortunately, provide basic training in these technologies.

The walkthrough describes an installation on a typical Microsoft Windows Server 2003/2008 system running IIS and MSSQL 2005 Standard Edition. It assumes that each of these products has been installed using following the default settings. It also assumes that the server is only used for the PowerMAN reporting platform. PMES has relatively low resource requirements and can happily co-exist on a server hosting other services. Whilst this scenario is not described in this document the basic approach discussed can be adapted to install the software on any of the supported environments with appropriate minor changes.

A separate document, called **PowerMAN Server Management Reporting Platform Guide**, explains how to manage everyday use of the reporting system.

Please remember that the PMES server is only used for reporting. It is not used to deploy PowerMAN and has no role in the active management of the client software. This must be done using the appropriate deployment and management software as described in the **PowerMAN Installation and Administration Guide**.

|                                                                                                                                |
|--------------------------------------------------------------------------------------------------------------------------------|
| <p><b>We strongly recommend that you read this entire guide before commencing a PowerMAN Enterprise Server deployment.</b></p> |
|--------------------------------------------------------------------------------------------------------------------------------|

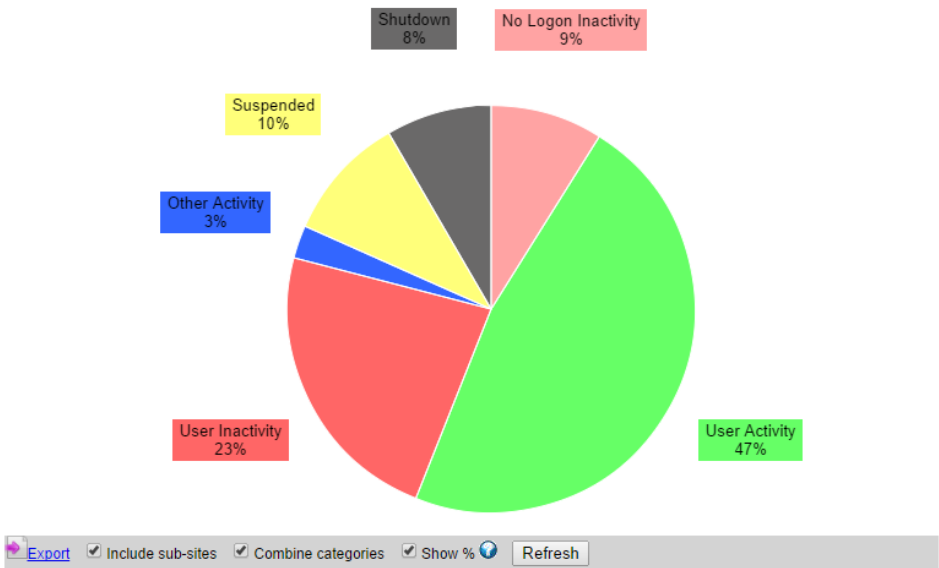
## New in PowerMAN Enterprise Server v5.3

The PowerMAN Enterprise Server v5.3 includes several new features. These include:

1. PowerMAN now supports **Live Reporting**. This shows the current workstation status across the selected reporting site and optionally all sub-sites. This feature requires minimal additional network bandwidth to provide an instant understanding of the current operational situation. It is ideal for display on departmental dashboards or similar:

### University of New Town Live Statistics

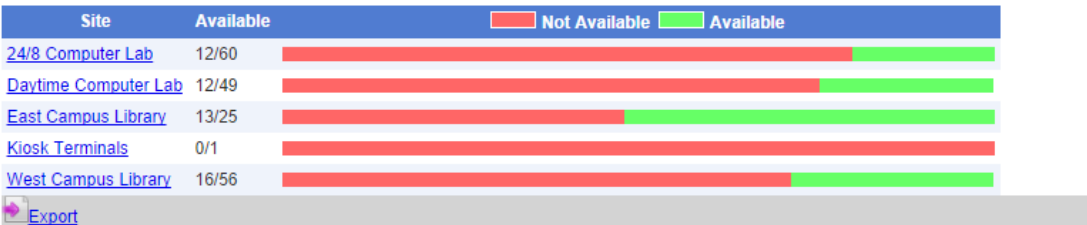
#### Live Activity Breakdown



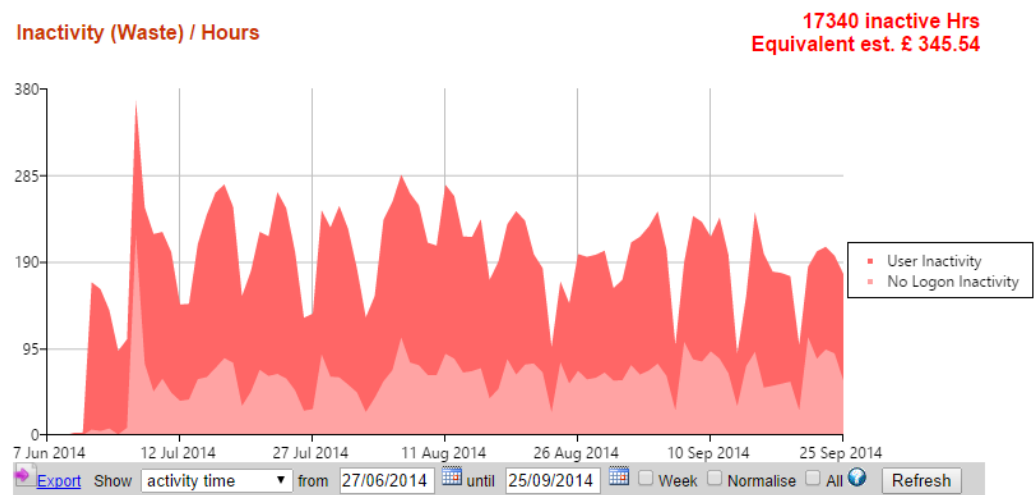
**Note: Live reporting requires a new client product key. This is available free-of-charge to PowerMAN customers with current software assurance agreements.**

2. PowerMAN now incorporates **Availability Reporting**. This shows workstations that are available for use and those already in use broken down by reporting site. This feature is intended for use on operational dashboards and organisation intranets:

### Sub-Site Computer Availability



3. The PowerMAN reporting engine has been updated to provide **more granular information**. In particular reports now distinguish between workstations that are idle because no user is logged on and workstations that are idle but logged on. This information can be extremely useful when designing a suitable remedial power policy:



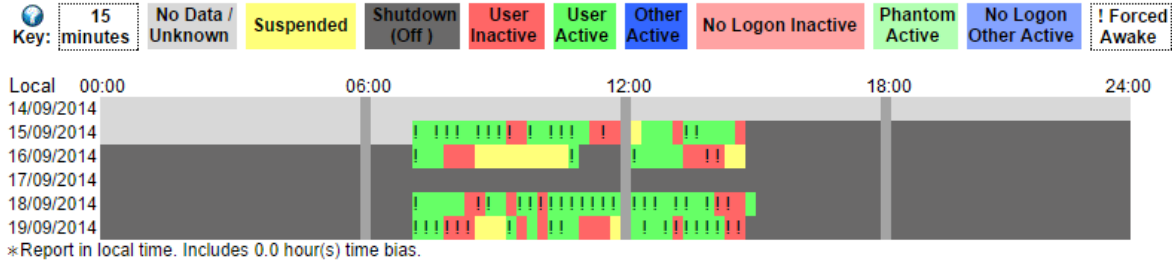
4. Similarly, the per-workstation report have been updated to show both current live status (including workstations shutdown or suspended) and summary by activity:

| Computer                        | ClientVer  | Last Status | Inactive % | Inactive Hours | Active Hours | <div><div>No Logon</div><div>User</div></div> | <div><div>Inactive User</div><div>Other</div></div> | Delete Move              |
|---------------------------------|------------|-------------|------------|----------------|--------------|-----------------------------------------------|-----------------------------------------------------|--------------------------|
| <a href="#">WIN732-1003662</a>  | 5.2.9.5888 | 25/09/2014  | 87.61      | 152.00         | 21.50        | <div><div></div><div></div></div>             | <div><div></div><div></div></div>                   | <input type="checkbox"/> |
| <a href="#">WIN764-381355R</a>  | 5.2.9.5880 | 25/09/2014  | 60.39      | 31.25          | 20.50        | <div><div></div><div></div></div>             | <div><div></div><div></div></div>                   | <input type="checkbox"/> |
| <a href="#">WIN764-1000690</a>  | 5.2.9.5888 | 25/09/2014  | 45.96      | 22.75          | 26.75        | <div><div></div><div></div></div>             | <div><div></div><div></div></div>                   | <input type="checkbox"/> |
| <a href="#">WIN732-886059R</a>  | 5.2.9.5888 | 25/09/2014  | 46.60      | 22.25          | 25.50        | <div><div></div><div></div></div>             | <div><div></div><div></div></div>                   | <input type="checkbox"/> |
| <a href="#">WIN732-1003674</a>  | 5.2.9.5880 | 25/09/2014  | 31.25      | 20.00          | 44.00        | <div><div></div><div></div></div>             | <div><div></div><div></div></div>                   | <input type="checkbox"/> |
| <a href="#">WIN764-1000682</a>  | 5.2.9.5880 | 25/09/2014  | 34.85      | 17.25          | 32.25        | <div><div></div><div></div></div>             | <div><div></div><div></div></div>                   | <input type="checkbox"/> |
| <a href="#">Shutdown 000687</a> | 5.2.9.5888 | 23/09/2014  | 35.61      | 11.75          | 21.25        | <div><div></div><div></div></div>             | <div><div></div><div></div></div>                   | <input type="checkbox"/> |
| <a href="#">WIN764-1003656</a>  | 5.2.9.5888 | 25/09/2014  | 22.11      | 11.00          | 38.75        | <div><div></div><div></div></div>             | <div><div></div><div></div></div>                   | <input type="checkbox"/> |

[Export](#) Show **worst** 8 computers from 18/09/2014 until 25/09/2014 [Refresh](#)

5. The workstation detail report has been redesigned to distinguish periods when the workstation was shutdown, suspended or forced awake by an application. This allows a detailed understanding of the workstation lifecycle to be formed and power management designed accordingly. In addition periods when the workstation is continually shutdown / suspended are now specifically distinguished in the report:

**Detailed Activity Report**





## PowerMAN Enterprise Server v5.3

6. PowerMAN may now optionally collect workstation hardware information. This may be useful when auditing an existing estate of workstations. This feature is enabled by default unless the computer identity is hidden. Information reported includes:
  - a. Number of CPU sockets / cores / logical processors
  - b. Estimated CPU speed (MHz)
  - c. CPU make / model
  - d. Installed RAM
  - e. Motherboard make / model
  - f. BIOS make / version / release date
  - g. Number of hard / optical disks

For instance:

### Data Synergy UK / ENGAGE

|                           |                                 |                       |                                          |
|---------------------------|---------------------------------|-----------------------|------------------------------------------|
| Site                      | <a href="#">Data Synergy UK</a> |                       |                                          |
| Computer                  | ENGAGE                          |                       |                                          |
| Created                   | 04/06/2013                      | MAC Address           | 00-90-F5-A7-EF-EF                        |
| Last Status               | 05/05/2014                      | Client Version        | 5.2.8.5829                               |
| Supports States           | S345                            | Windows® Version      | 6.1.7601 Service Pack 1                  |
| Supports Wake             | S123                            | Timezone              | 1.0 hour(s) UTC                          |
| Disk Standby              | Supported                       | Hardware buttons      | Power Sleep Lid                          |
| System HDD Free           | 50,963 MB                       | Hibernation File (S4) | Present                                  |
| Battery                   | Battery supported (Portable)    | Platform              | x64 (64-bit)                             |
| CPU Sockets/Cores/Logical | 1 / 2 / 4 2261 MHz              | CPU Model             | Intel(R) Core(TM) i3 CPU M 350 @ 2.27GHz |
| System RAM                | 3892 MB                         | System Model / Vendor | W760 / CLEVO Co.                         |
| Fixed / Optical Drives    | 1 / 0                           | BIOS Vendor           | Phoenix Technologies LTD                 |

7. The PowerMAN reporting interface has been redesigned to use a new tabbed interface. This feature results in a less cluttered UI:



8. The PowerMAN reporting interface now provides improved integration with Data Synergy WakeMyPC. The UI can now be used to wake both individual workstations and entire groups of workstations:

| Inactive % | Inactive Hours | Active Hours | No Logon User | Inactive User Other | WakeAll              | Delete                   | Move |
|------------|----------------|--------------|---------------|---------------------|----------------------|--------------------------|------|
| 99.87      | 191.75         | 0.25         |               |                     | <a href="#">Wake</a> | <input type="checkbox"/> |      |
| 60.57      | 63.75          | 41.50        |               |                     | <a href="#">Wake</a> | <input type="checkbox"/> |      |
| 69.29      | 41.75          | 18.50        |               |                     | <a href="#">Wake</a> | <input type="checkbox"/> |      |

## PowerMAN Enterprise Server v5.3

### Prerequisites

PowerMAN Enterprise Server has the following requirements:

- A server with at least 4GB of RAM running Windows Server 2003, 2008 or 2012. Larger installations may require more RAM. The server may be either x86 or x86-64 based.
- Internet Information Services with ASP.NET support and the Microsoft .NET 3.5 Framework.
- Approximately 1MB of data storage per client computer per year. e.g. 20,000 PCs will require approximately 20GB of storage per annum.
- Microsoft® SQL Server Standard Edition 2005 or later with the most recent service pack installed. Smaller deployments (<10,000 workstations) may also use the free SQL Express Edition. In the situation we suggest using the “SQL Express with Tools” variant.
- Skills to configure Windows Server, IIS and MS SQL Server

It is your responsibility to obtain the necessary Windows Server and Microsoft SQL Server product licenses. The costs associated with this should be small compared to the potential savings from using PowerMAN in an enterprise environment. However, if the costs of these components are prohibitive, it may be more appropriate to use the PowerMAN hosted reporting platform.

The Microsoft .NET 3.5 Framework can be obtained from the following location:

<http://www.microsoft.com/downloads/details.aspx?FamilyId=333325FD-AE52-4E35-B531-508D977D32A6&displaylang=en>

### Deployment Components

PowerMAN Enterprise Server is supplied as three components:

- PowerMAN Enterprise Server Database hosted by MSSQL Server. This is supplied as an SQL Server backup file called **PowerMAN5x Database.bak**. This must be restored on to your server.

NB: There are other means to distribute a SQL Server based system, however, a SQL database backup neatly encapsulates the more complex methods and is the most trouble free way to achieve a reliable deployment. An alternative SQL Script based deployment mechanism is described in Appendix A. This is intended for advanced SQL system administrators.

- PowerMAN Enterprise Website (hosted by MS IIS). This is supplied in two ZIP files (only one is required).

The appropriate file must be extracted and configured using IIS:

**PowerMAN5x Website x86.zip** is for 32-bit operating system platform

**PowerMAN5x Website x64.zip** is for 64-bit operating system platform

## PowerMAN Enterprise Server v5.3

- The Installation Guide (this document) which describes the system and a walkthrough installation.

### Deployment Assumptions

The walkthrough below makes certain assumptions about the server configuration. These are as follows:

- The server prerequisite components are installed using their default settings
- The same server is used for the SQL database and the website
- The SQL server is configured as the default instance and uses Windows Integrated Authentication (or mixed authentication). The use of default and named instances is described in the following document:  
<http://msdn.microsoft.com/en-us/library/aa174516.aspx>
- The SQL database is configured to use the Simple recovery model
- The website is configured to serve content on port 8080, to allow anonymous access (except the Secure folder) and to use an application pool running in the security context of the Network Services account
- The Network Services account is a member of the database role called 'Website' – This provides the website with the limited database access necessary to function correctly. This configuration is described below.

PMES is flexible software and, within reason, can function in a variety of environments. You may choose to re-configure your server to use Windows Integrated Authentication for all website access (except the PostStatus.aspx file) or otherwise change the assumptions used in this document. Whilst there may be many organisation specific reasons for doing this we would recommend that you initially deploy the software using the method presented and consider the impact of re-integrating future PowerMAN Enterprise Server releases.

PMES can be used in a virtualised environment. This has the advantage that a standalone server can be quickly configured, using the methods described in this document, without impacting on any pre-existing systems. This technique also has the advantage that the PMES system can be easily backed-up as a single entity and quickly transferred to another hardware platform.

## Getting Started

Before starting to deploy PMES please check that you have the following:

- A hardware/software platform meeting the requirements described
- An understanding of the installation process (read this document)
- The PMES distribution files
- A PMES product key. For the purposes of this document the following fictitious information is used:

**Organisation:** Example Corporation Limited

**Product Key:** XGHK-GABQ-GDTH-UJKQ-HYJK-DBKY

NB: This product key is a demonstration key and will not function on a live system. Please remember the client product key and the server product key **are different**.

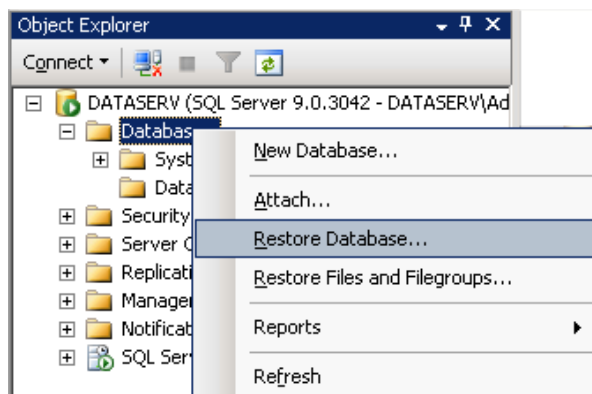
## SQL Database Configuration Walkthrough

The following steps walk through a typical deployment using Microsoft SQL 2005 Server or later. It assumes that the database files are to be located in C:\Database\PowerMAN5.

**Tip:** An alternative, script based, SQL deployment mechanism is described in Appendix A. This is intended for advanced SQL administrators only.

The pre-configured SQL database can be installed using the following steps:

1. Create folder for database files. C:\Databases\PowerMAN5
2. Open SQL Server Management Studio
3. Start the database restore wizard



4. Configure the database name as : PowerMAN5
5. Select 'From Device' and locate the PowerMAN5 Database.bak file

Destination for restore

Select or type the name of a new or existing database for your restore operation.

To database:

To a point in time:

Source for restore

Specify the source and location of backup sets to restore.

☐ From database:

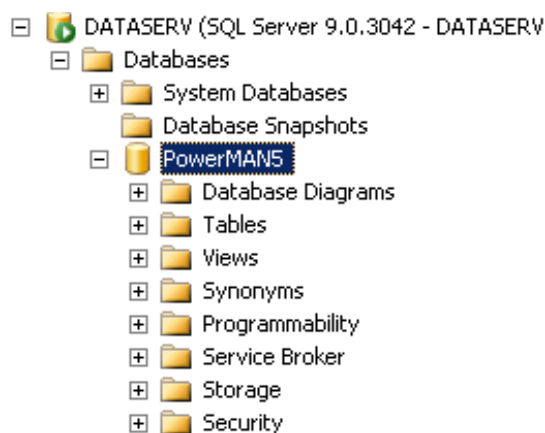
☒ From device:

Select the backup sets to restore:

| Restore                             | Name                           | Component | Type | Server | Database  |
|-------------------------------------|--------------------------------|-----------|------|--------|-----------|
| <input checked="" type="checkbox"/> | PowerMAN5-Full Database Backup | Database  | Full | LAPTOP | PowerMAN5 |

OK Cancel

6. Select Options and enter the correct restore path e.g. C:\Databases\PowerMAN5

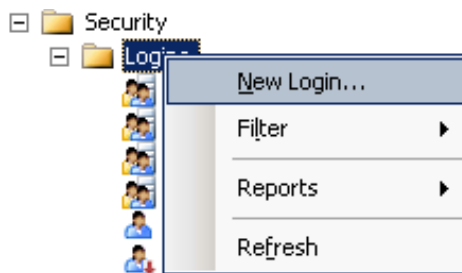


7. Click **OK** to restore the database. On a typical server this will take only a few seconds

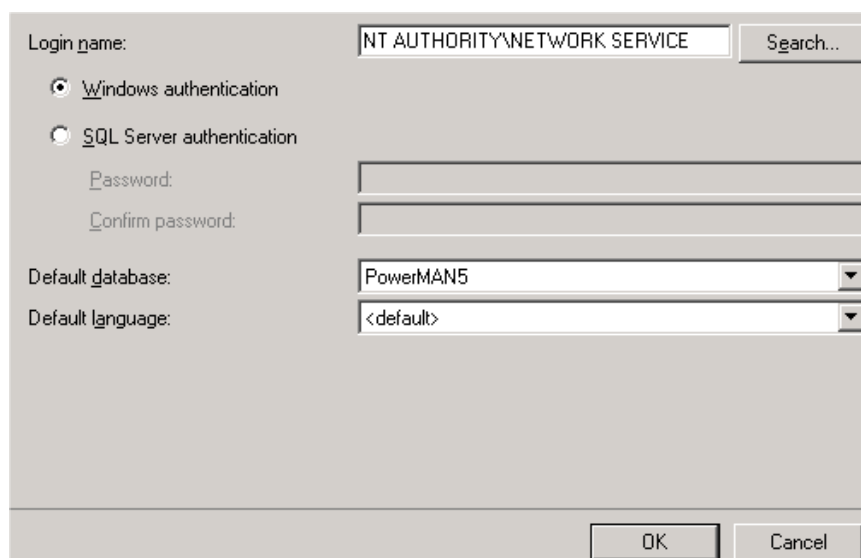
## Database Login Configuration

Following database installation (including via the script method described in Appendix A) the website/database user login should be configured using the following procedure:

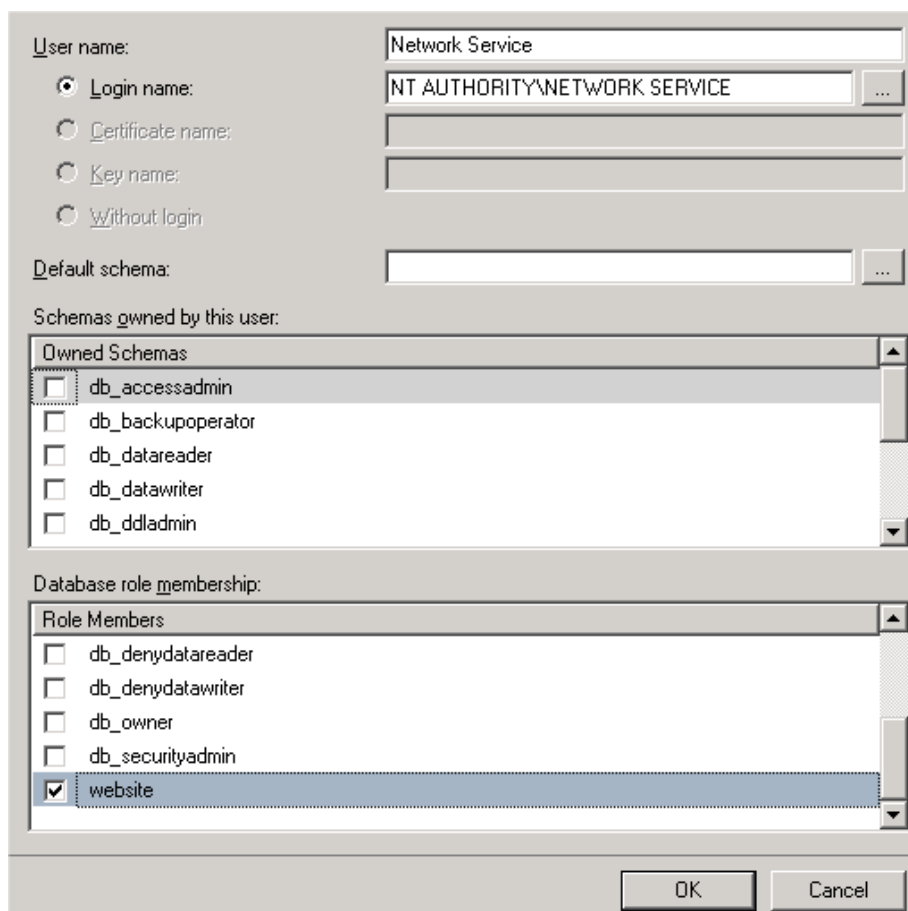
1. Open SQL Server Management Studio
2. Navigate to **Security\Logins**
3. Right click and select **New Login**



4. Click **Search**
5. Enter **Network Service** in the box and click **OK**
6. Confirm the Network Service account is listed (as shown below) and click **OK** again



7. Navigate to **Databases\PowerMAN5\Security\Users**
8. Right click and select **New User**
9. Click the top search ... button and locate the Network Service user
10. Select the 'Website' database role
11. Click **OK**



User name: Network Service

☒ Login name: NT AUTHORITY\NETWORK SERVICE ...

☐ Certificate name:

☐ Key name:

☐ Without login

Default schema:

Schemas owned by this user:

Owned Schemas

- ☒ db\_accessadmin
- ☐ db\_backupoperator
- ☐ db\_datareader
- ☐ db\_datawriter
- ☐ db\_ddladmin

Database role membership:

Role Members

- ☐ db\_denydatareader
- ☐ db\_denydatawriter
- ☐ db\_owner
- ☐ db\_securityadmin
- ☒ website

OK Cancel

The **'Website'** database role has the limited database access rights to operate the PowerMAN Enterprise Server system. For security reasons not all database objects are accessible to this database role. More advanced configuration and database maintenance must be manually performed using the SQL Server Management Studio.

You **MUST** also configure an appropriate database performance optimization and backup strategy. An example procedure is explained later in this document.

## Website Configuration Walkthrough - Windows Server 2003

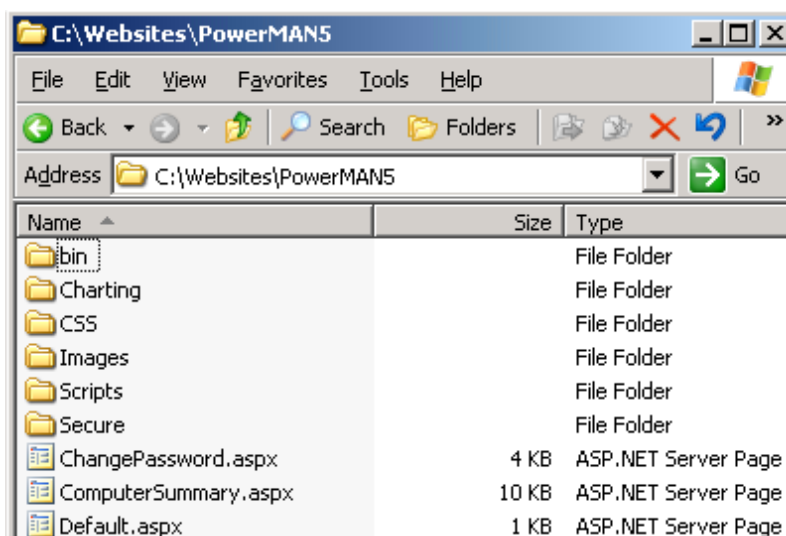
The following steps walk through a typical deployment on a system running Windows 2003. It assumes that the website files are located in C:\Websites\PowerMAN5.

The procedure below assumes that the majority of the website is configured to allow anonymous access (the default). If you deviate from this assumption please remember that the **PostStatus.aspx** file, as a minimum, must be available to the PowerMAN client software. This software runs in the machine account of the client computer. The one exception to this assumption is that the Secure folder is configured to provide access only to appropriate Administrators. This is described in the procedure below.

Before proceeding to configure the website please confirm that the Microsoft .NET 3.5 Framework is installed. The quickest way to do this is to check for the presence of the following folder: C:\WINDOWS\Microsoft.NET\Framework\v3.5.

To configure the website proceed as follows:

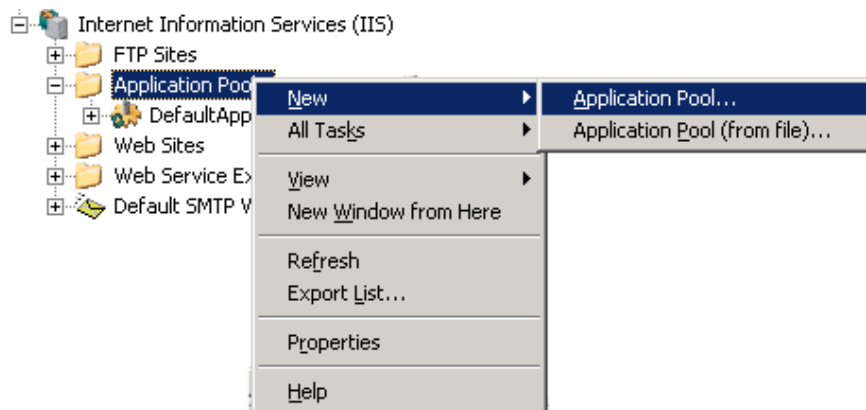
1. Create folder for website files: C:\Websites\PowerMAN5
2. Extract the appropriate PowerMAN5 Website ZIP file (x86 or x64) to this folder



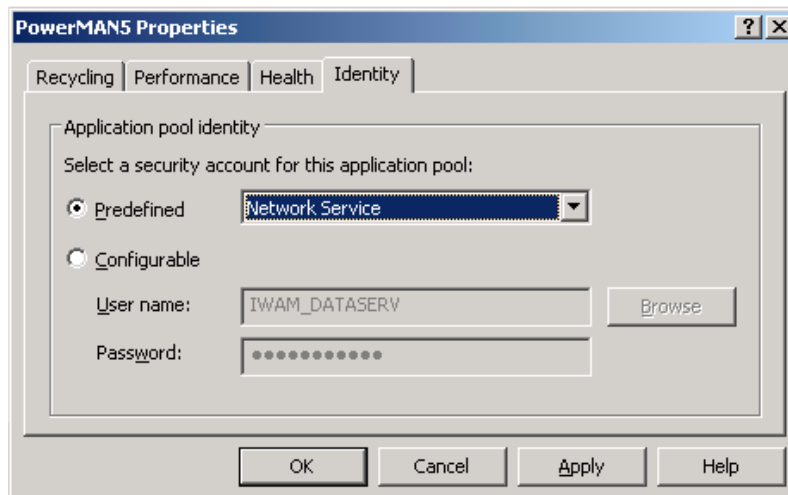
3. Open the IIS Management snap-in
4. Navigate to Internet Information Servers\Application Pools
5. Right click and select **New\Application Pool**



## PowerMAN Enterprise Server v5.3



6. Enter the pool name: **PowerMAN5** and click **OK**
7. Navigate to the newly created PowerMAN5 application pool
8. Right click and select **Properties**
9. Navigate to the Identity tab
10. Select 'Predefined: Network Service' and click **OK**

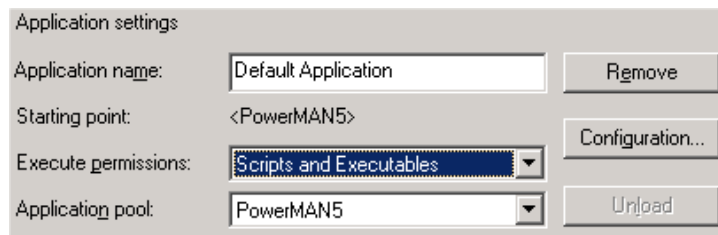


11. Navigate to **Websites**
12. Right click and select **New Websites**
13. Click **Next** and enter the website name: PowerMAN5. Click **Next** again.
14. Select the appropriate server IP address range and port number. The default port is 8080. Click **Next**.

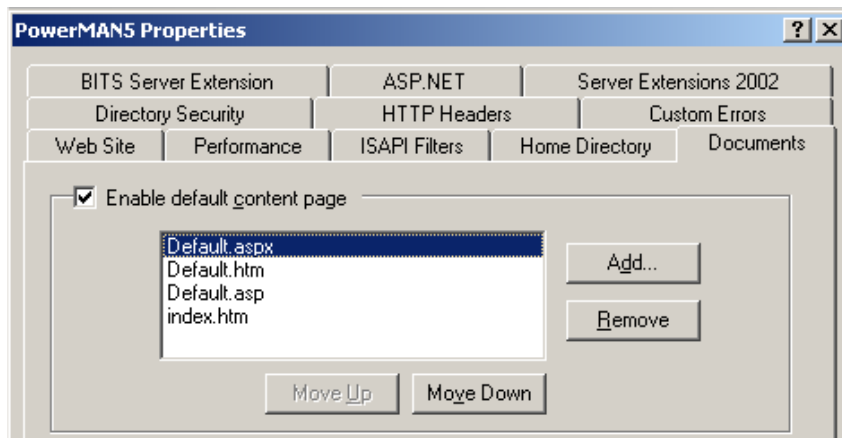
**Important:** The website **MUST** be accessible to the computers running the PowerMAN client software. If the IIS server is behind a firewall please remember to ensure you have granted the appropriate access. If necessary you can configure the website to accept connections on more than one port. The hosted PowerMAN service uses this technique to accept connections on both ports 443 and 8080.

## PowerMAN Enterprise Server v5.3

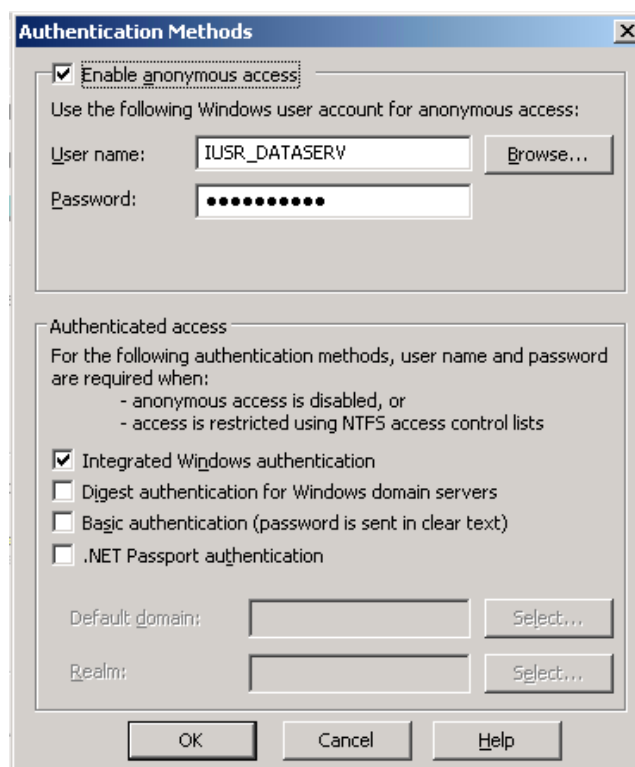
15. Enter the appropriate website file path: C:\Websites\PowerMAN5
16. Ensure 'Allow anonymous access to this website' is selected. Click **Next**
17. Ensure 'Read' is ticked. Click **Next** and then **Finish**
18. Right click on the newly created PowerMAN5 website and select **Properties**
19. Navigate to the **Home Directory** tab
20. Select '**Scripts and Executables**' (under Execute Permissions)



21. Select the recently created **PowerMAN5** application pool (as shown)
22. Click **Apply**
23. Navigate to the **Documents** tab
24. Confirm **Enable default content page** is selected and that a default entry is present for **Default.aspx**. If necessary click **Add** and add **Default.aspx**

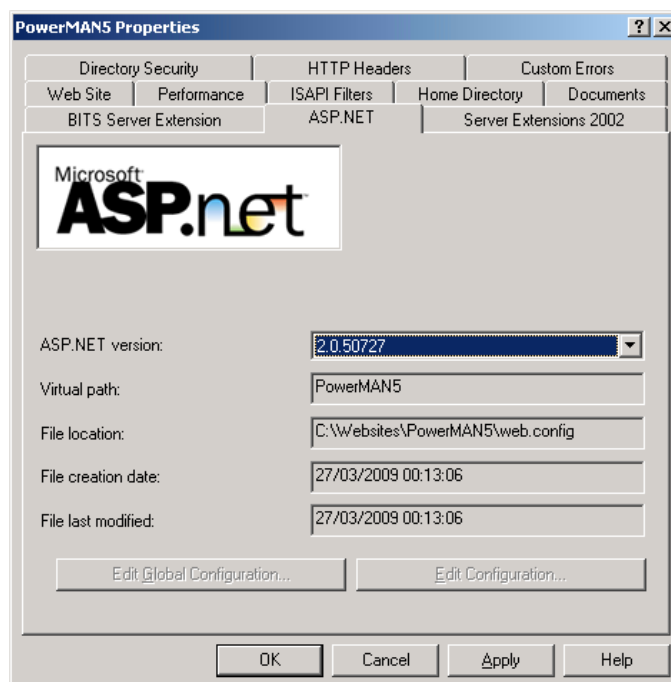


25. Click **Apply**
26. Navigate to the **Directory Security** tab and **press Authentication and Access Control/Edit**
27. Confirm that anonymous access is enabled (shown below):



28. Navigate to the **ASP.NET** tab.

29. Ensure that ASP.NET version is set to 2.0 (this the underlying version used by the 3.5 framework). If necessary change this and click **Apply**.



**Tip:** If you installed IIS after the .NET Framework you will need to re-register .NET with IIS using the following OS specific command:

**32-bit OS:** %windir%\Microsoft.NET\Framework\v2.0.50727\aspnet\_regiis.exe -i

or

**64-bit OS:** %windir%\Microsoft.NET\Framework64\v2.0.50727\aspnet\_regiis.exe -i

30. Navigate to the **Website** tab and configure the IIS logging settings appropriate to your organisation.

**Tip:** IIS logging should normally be enabled. This feature can be very useful when troubleshooting any website problems in the future.

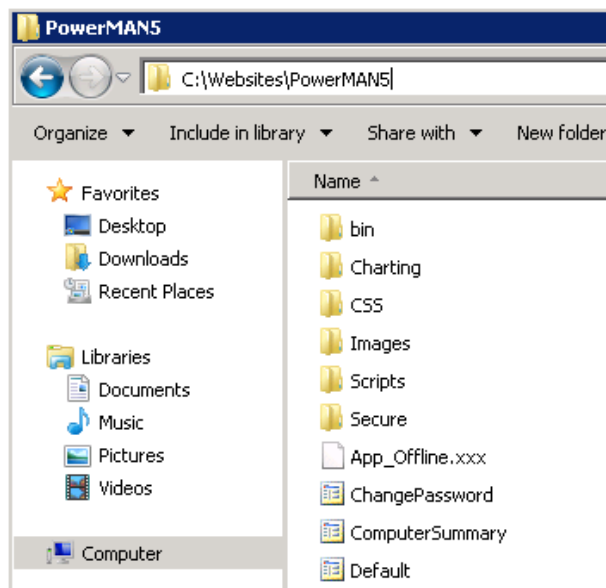
## Website Configuration Walkthrough - Windows Server 2008/2012

Windows Server 2008 (IIS 7) and later differs in several important respects from previous versions. The following steps walk through a typical deployment on a system running Windows 2008 or later. It assumes that the website files are located in C:\Websites\PowerMAN5.

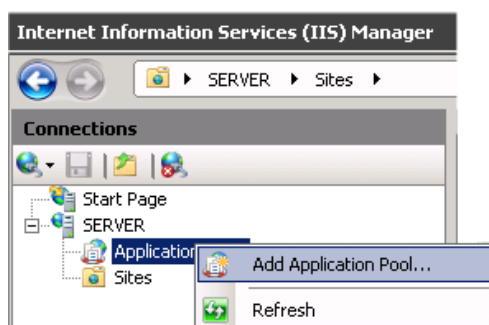
The procedure below assumes that the majority of the website is configured to allow anonymous access (the default). If you deviate from this assumption please remember that the **PostStatus.aspx** file, as a minimum, must be available to the PowerMAN client software. This software runs in the machine account of the client computer. The one exception to this assumption is that the Secure folder is configured to provide access only to appropriate Administrators. This is described in the procedure below.

To configure the website proceed as follows:

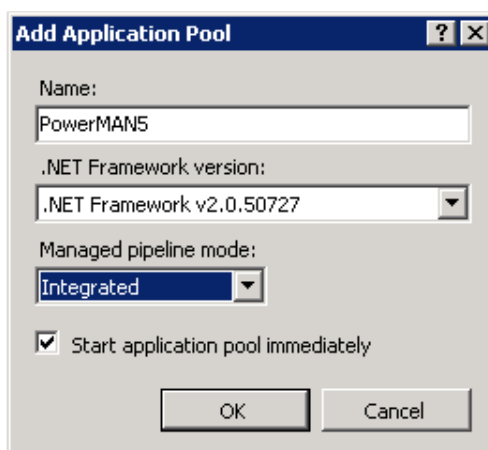
1. Create folder for website files: C:\Websites\PowerMAN5
2. Extract the appropriate PowerMAN5 Website ZIP file (typically x64) to this folder



3. Open the Server Manager
4. Locate the **Internet Information Services (IIS)** Management snap-in (INETMGR.EXE)
5. Navigate to **Application Pools**
6. Right click and select **Add Application Pool**

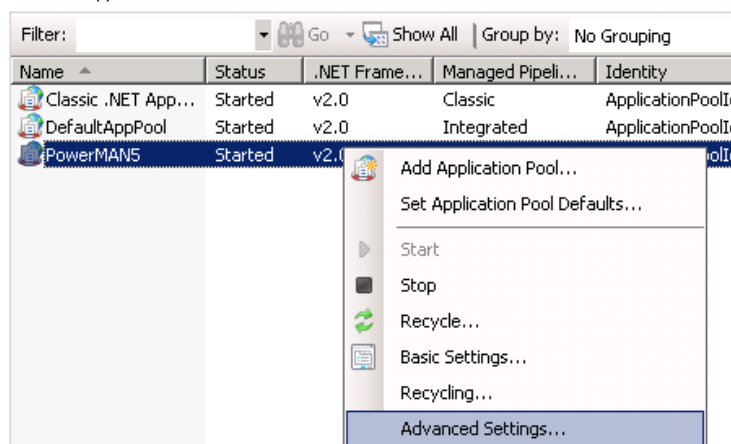



7. Enter the pool name: **PowerMAN5** and select **.NET Framework v2.0.50727**:

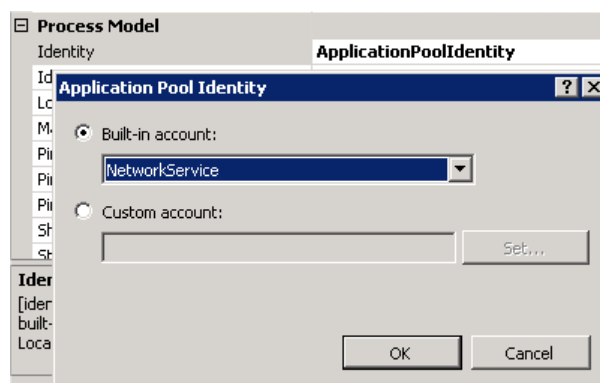


8. Navigate to the newly created **PowerMAN5** application pool
9. Right click and select **Advanced Settings**

This page lets you view and manage the list of application pools on the server. Application pools are associated with worker processes, contain one or more applications, and provide isolation among different applications.



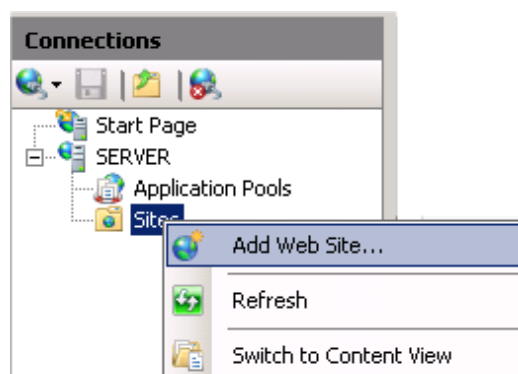
10. Navigate to the **Identity** setting and press 
11. Select **Built-in account: Network Service** and click **OK**



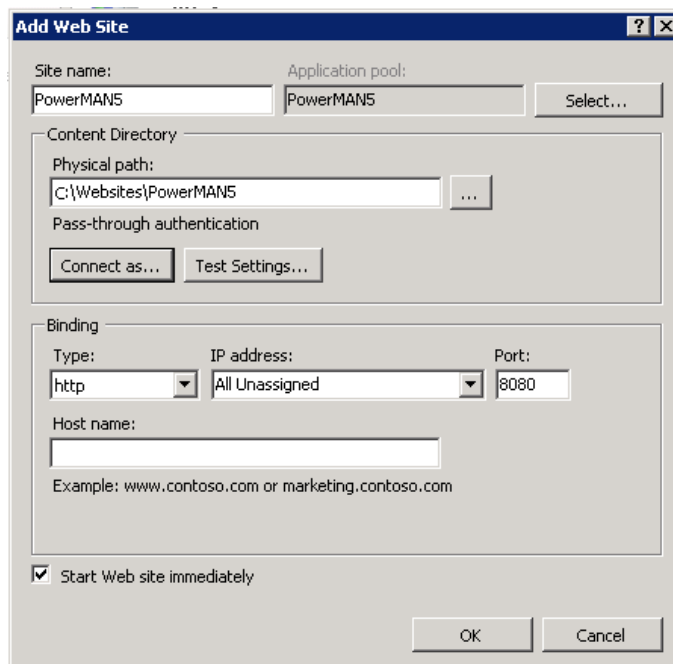
**Tip:** If the SQL database is located on a remote server you must also change the Load User Profile option to **True**.

|                          |      |
|--------------------------|------|
| Idle Time-out (minutes)  | 20   |
| Load User Profile        | True |
| Maximum Worker Processes | 1    |

12. Close the Application Pool settings by selecting **OK**
13. Navigate to **Sites**
14. Right click and select **Add Web Site**



15. Enter the Site Name: **PowerMAN5**
16. Select the Application Pool: **PowerMAN5**
17. Select the appropriate website path, server IP address range and port number. The default port is 8080. Click **OK**.



**Add Web Site**

Site name: PowerMAN5 Application pool: PowerMAN5 Select...

Content Directory

Physical path: C:\Websites\PowerMAN5 ...

Pass-through authentication

Connect as... Test Settings...

Binding

Type: http IP address: All Unassigned Port: 8080

Host name:

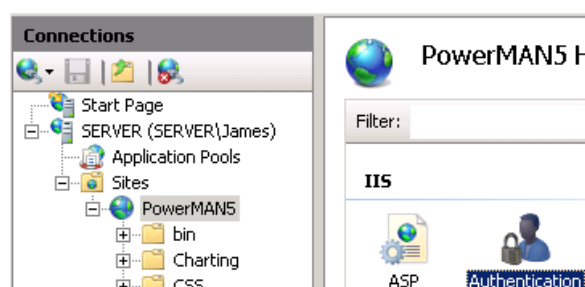
Example: www.contoso.com or marketing.contoso.com

☒ Start Web site immediately

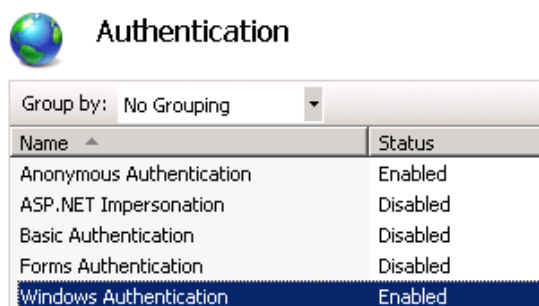
OK Cancel

**Important:** The website **MUST** be accessible to the computers running the PowerMAN client software. If the IIS server is behind a firewall please remember to ensure you have granted the appropriate access. If necessary you can configure the website to accept connections on more than one port. The hosted PowerMAN service uses this technique to accept connections on both ports 443 and 8080.

18. Navigate to **Authentication** and double click



19. Confirm that **Anonymous Authentication** and **Windows Authentication** are both enabled (shown below):





**Tip:** IIS 7 includes a number of changes over previous versions. In particular the way anonymous website access operates has changed. The built-in IUSR account replaces the IUSR\_MachineName account. You will not normally need to explicitly configure anonymous website access. This is explained further here:

<http://learn.iis.net/page.aspx/140/understanding-the-built-in-user-and-group-accounts-in-iis-70/>

20. Navigate to **Logging** and configure the IIS logging settings appropriate to your organisation.

**Tip:** IIS logging should normally be enabled. This feature can be very useful when troubleshooting any website problems in the future.

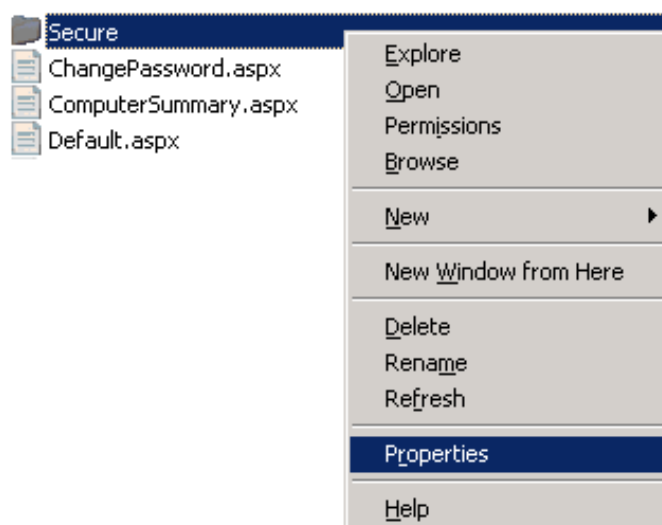
## Securing the website - Windows 2003

The following section explains how to secure the website on Windows 2003. The subsequent section explains this for Windows 2008.

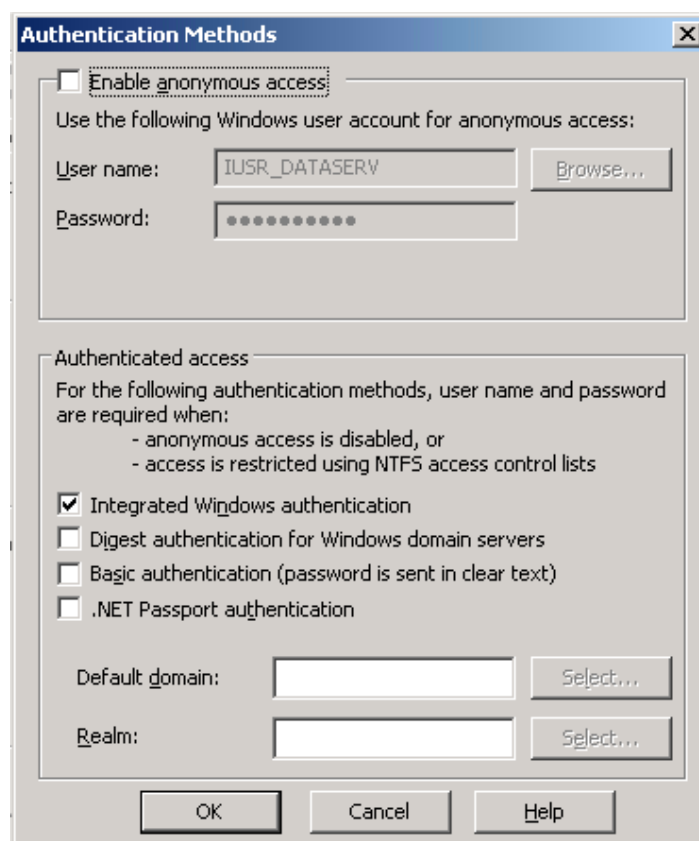
The PMES website incorporates a **Secure** folder that contains tools only for administrator use. The pages within this folder are used to perform the initial online server configuration and to administer the PMES system. These pages **MUST be secured** as they must not be available for anonymous access. This is typically done using Windows Integrated Authentication.

To disable anonymous access for this folder proceed as follows:

1. Open the IIS Management snap-in
2. Navigate to **Websites\PowerMAN5**
3. Locate the Secure folder in the right hand pane
4. Right click and select **Properties**



5. Navigate to the Directory Security tab and press **Edit**
6. Untick 'Enable Anonymous Access'
7. Ensure 'Integrated Windows Authentication' is selected.
8. Click **OK**

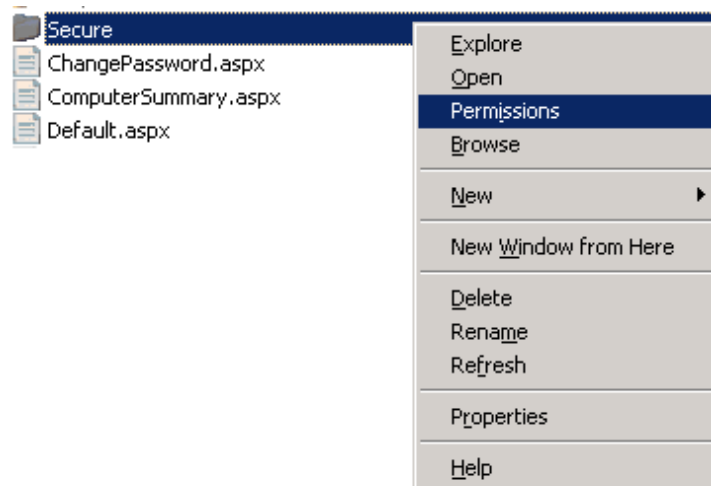


To configure the specific users / groups permitted to access this folder proceed as follows:

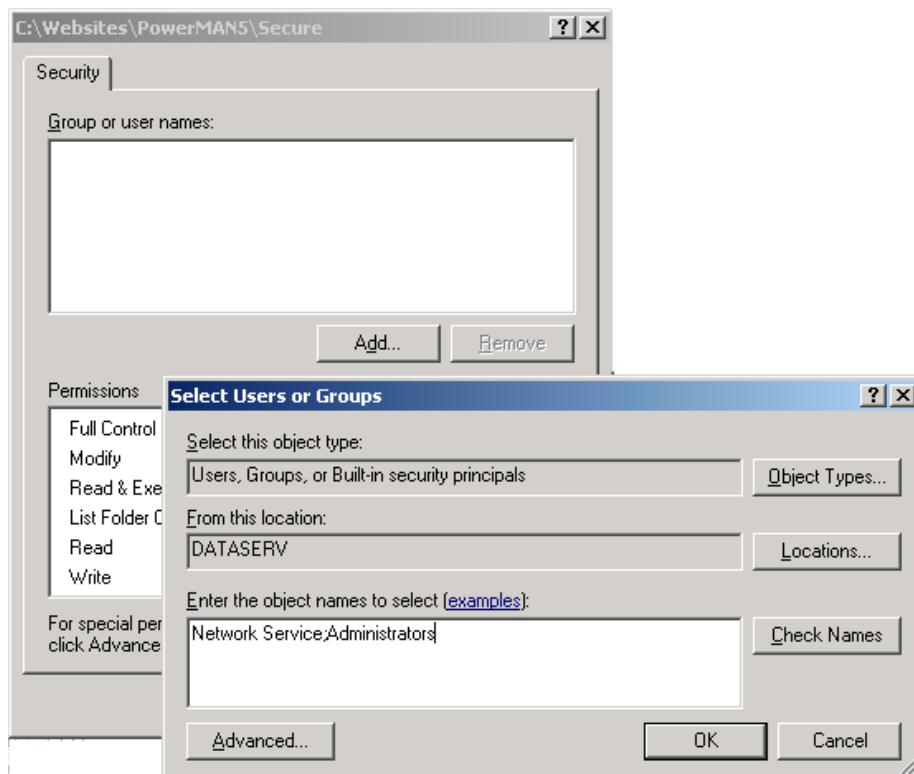
9. Open the IIS Management snap-in

## PowerMAN Enterprise Server v5.3

10. Navigate to **Websites\PowerMAN5**
11. Locate the **Secure** folder in the right hand pane
12. Right click and select **Permissions**



13. Click **Advanced**
14. Untick 'Allow inheritable permissions from the parent to propagate'
15. Click **Remove** and then click **OK** (if prompted by a warning click **Yes**)
16. Click **Add** and select the users or groups who will be allowed access to the secure website pages. For instance Network Service and Administrators:



17. Click **OK**

## PowerMAN Enterprise Server v5.3

18. Confirm the selected users have **Read access** (you can deselect Read & Execute and List Folder Contents) and click **OK**

NB: Please remember the Network Service **MUST** be included in the user list for the website to function correctly.

**Tip:** You can also remove or rename the **Secure** folder for added security. It is not required for day-to-day server use.

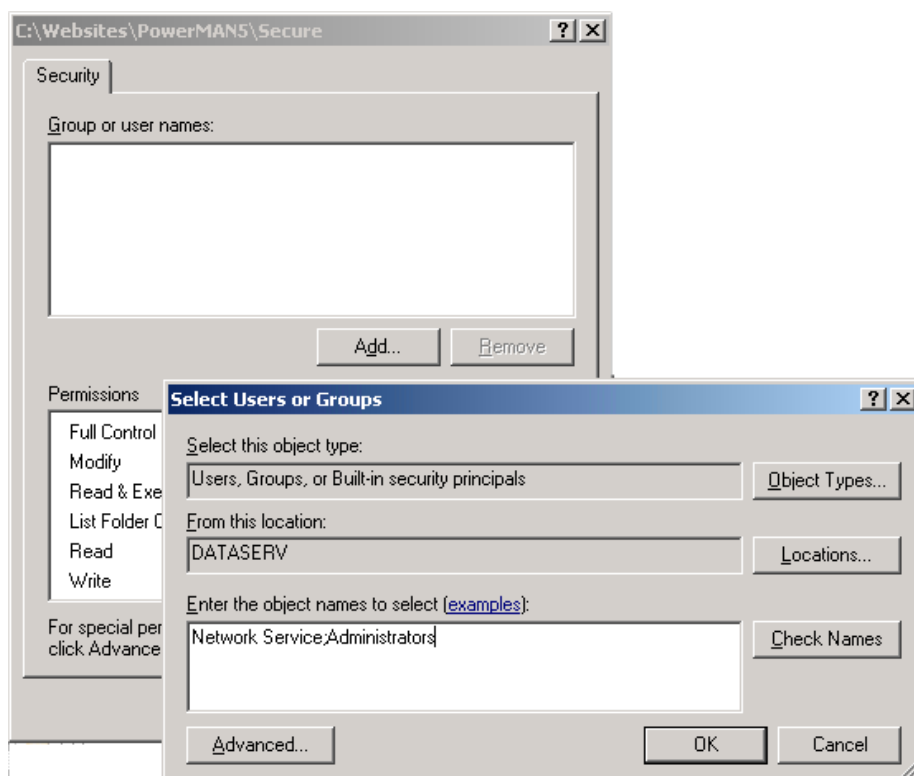
## Securing the website - Windows 2008/2012

The following section explains how to secure the website on Windows 2008 or later. This is very similar to the previous section describing Windows 2003 with minor changes.

The PMES website incorporates a **Secure** folder that contains tools only for administrator use. The pages within this folder are used to perform the initial online server configuration and to administer the PMES system. These pages **MUST be secured** as they must not be available for anonymous access. This is typically done using Windows Integrated Authentication.

To disable anonymous access for this folder proceed as follows:

1. Open the Server Manager
2. Locate the **Internet Information Services (IIS)** Management snap-in (INETMGR.EXE)
3. Navigate to **Sites**
4. Locate the **PowerMAN5** site
5. Select **Content View**
6. Locate the Secure folder
7. Right click and select **Edit Permissions**
8. Navigate to the **Security** tab and press **Edit**
9. Click **Advanced**
10. Click **Changed Permissions** (if necessary)
11. Un-tick 'Include inheritable permissions from this objects parent'
12. Click **Remove** and then click **OK** (if prompted by a warning click **Yes**)
13. Click **Add** and select the users or groups who will be allowed access to the secure website pages. For instance Network Service and Administrators:



14. Click **OK**

15. Confirm the selected users have **Read access** (you can deselect Read & Execute and List Folder Contents) and click **OK**

NB: Please remember the Network Service **MUST** be included in the user list for the website to function correctly.

**Tip:** You can also remove or rename the **Secure** folder for added security. It is not required for day-to-day server use.

## Using a remote SQL Server

The walkthrough above describes a configuration where the website and database are located on the same physical server. This approach allows the Network Service account to be used to access the database. The following section explains, briefly, the changes necessary to configure the website to operate with a SQL server located on another server.

**You can ignore this section if the web server and SQL server are running on the same server.**

This section assumes that both the web server and SQL server are members of the **same Windows domain**. The procedure below replaces the Network Service account with a standard domain user account. The procedure described is for Windows 2003. An almost identical procedure may be used for later releases.

To create this account proceed as follows:

1. Open the **Active Directory Users and Computers** snap-in
2. Right click on Users and select **New\User**
3. Enter an appropriate username, for instance **PowerMAN**, and click **Next**
4. Enter an appropriate password (twice)
5. Ensure **User must change password at next logon** is NOT selected
6. Select other configuration settings appropriate for your organisation. Typically the account should be configured to avoid password expiry as this will result in the server failing.
7. Click **Next** and then click **Finish**

The domain user account can now be configured for the PowerMAN5 application pool:

8. Open the IIS Management snap-in
9. Navigate to the PowerMAN5 application pool
10. Right click and select **Properties**
11. Navigate to the Identity tab
12. Select Configurable
13. Click **Browse** and locate the domain user (PowerMAN) account. Click **OK**
14. Enter the appropriate password
15. Click **Apply** and enter the password again

|                                                                                          |
|------------------------------------------------------------------------------------------|
| <b>Windows 2008:</b> You must also change the Local User Profile option to <b>True</b> . |
|------------------------------------------------------------------------------------------|

## PowerMAN Enterprise Server v5.3

The domain user account must be granted read access to the website files. This is configured as follows:

1. Open the IIS Management snap-in
2. Navigate to **Websites\PowerMAN5**
3. Locate the Secure folder in the right hand pane
4. Right click and select **Permissions**
5. Click **Add** and locate the domain user account (PowerMAN). Click **OK**
6. Select **Read** (deselect all other options) and then click **OK**

**Windows 2003:** You must also add the application pool identity (domain user) to the local **IIS\_WPG** group.

Finally, the domain user account can be made a member of the **website** role of the database:

1. Open SQL Server Management Studio
2. Navigate to **Security\Logins**
3. Right click and select **New Login**
4. Click **Search**
5. Locate the recently created domain user account (PowerMAN) and click **OK**
6. Change the default database to **PowerMAN5** and click **OK** again
7. Navigate to **Databases\PowerMAN5\SecurityUsers**
8. Right click and select **New User**
9. Click the top search ... button and locate the domain user account
10. Select the 'Website' database role
11. Click **OK**

## Using a named instance SQL Server

Microsoft SQL server supports both default and named database instances. This following Microsoft document explains database instances:

<http://msdn.microsoft.com/en-us/library/aa174516.aspx>

The SQL walkthrough in this document assumes that the SQL server is running as a default instance.

To use a specific named database instance the **ConnectionString** setting, stored in the web.config file, must be amended accordingly. For instance to use a remote database instance called 'SqlExpress' this would be:

*Data Source=Server\SqlExpress;Initial Catalog=PowerMan5; Integrated Security=True*



## Configuring PowerMAN Enterprise Website

The majority of the remaining PMES configuration is contained in the web.config file. This is located in the root of the website and can be edited with Notepad or a similar text editor program. The settings in the web.config file are stored in XML format. We recommend that you backup this file before making any changes.

As supplied the file must be manually edited to include the settings appropriate for the installation. A basic PMES server requires relatively few common settings. These are described below:

### Common web.config settings

| Setting                                | Meaning                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>RegisteredOrganisation</b>          | The name of the registered organisation. For instance:<br><br><i>Example Corporation Limited</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>RegisteredProductKey</b>            | The product key. For instance:<br><br><i>XGHK-GABQ-GDTH-UJKQ-HYJK-DBKY</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>ConnectionString</b>                | The MS SQL database connection string.<br><br>For a <b>local (default instance)</b> database this is typically:<br><br><i>Data Source=localhost;Initial Catalog=PowerMan5;Integrated Security=True</i><br><br>For a <b>local</b> database instance called 'SqlExpress' this would be:<br><br><i>Data Source=.\SqlExpress;Initial Catalog=PowerMan5;Integrated Security=True</i><br><br>For a <b>remote</b> database instance called 'SqlExpress' located on a PC called 'Server' this would be:<br><br><i>Data Source=Server\SqlExpress;Initial Catalog=PowerMan5; Integrated Security=True</i> |
| <b>SiteRoot</b>                        | The URL of the web server.<br><br><i>e.g. <a href="http://www.examplecorp.com">www.examplecorp.com</a> or 192.168.200.10</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>SecurePath</b>                      | The URL of the secure administration folder. This is prefixed with a tilde character:<br><br><i>e.g. ~/Secure</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>IntegratedWindowsAuthentication</b> | The user authentication method. This may be:<br>True – Use integrated Windows authentication<br>False – Use email address + password authentication<br><br><i>e.g. True</i>                                                                                                                                                                                                                                                                                                                                                                                                                     |

## Email configuration web.config settings

| Setting              | Meaning                                                                                                                                                                                                           |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>BugEmail</b>      | The email address to send website error reports. Please see the section on SMTP server configuration below. This feature is optional.<br><br>e.g. support@yourcompany.com                                         |
| <b>WebsiteEmail</b>  | The email account from which to send email bug reports and user notifications. If SMTP authentication is enabled on the email server then this must be a recognised account.<br><br>e.g. powerman@yourcompany.com |
| <b>SMTPServer</b>    | The SMTP server used for sending emails. This feature also requires that the BugEmail and WebsiteEmail settings are configured:<br><br>e.g. localhost                                                             |
| <b>SMTPUsername</b>  | The username to use for SMTP authentication. This may be blank if authentication is not required.                                                                                                                 |
| <b>SMTPPassword</b>  | The password to use for SMTP authentication. This may be blank if authentication is not required.                                                                                                                 |
| <b>SMTPPort</b>      | The TCP port used for SMTP server access. This is normally port 25.<br><br>e.g. 25                                                                                                                                |
| <b>SMTPEnableSSL</b> | Use SSL to access the SMTP server. This is required by some SMTP servers as an additional security measure. This feature is disabled by default.<br><br>e.g. False                                                |

## Advanced web.config settings

The following advanced settings are provided. The default values are typically sufficient but may be amended if required:

| Setting                         | Meaning                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>FriendlyErrorHandler</b>     | This feature allows detailed error reports to be displayed on the server console.<br><br>e.g. True                                                                                                                                                                                                                                                             |
| <b>CommandTimeoutSecond</b>     | Specifies the SQL database command timeout. This is the period of time a complex operation may take before timing out. 120 seconds is sufficient in almost all cases. If complex operations frequently take longer than this it may indicate a problem with SQL server configuration (disk configuration, memory or indexes)<br><br>e.g. 120                   |
| <b>ServerMaintenanceMessage</b> | Defines maintenance message that is displayed to all users at the top of the PMES screen. This is normally blank.<br><br>e.g. This server will be unavailable for scheduled maintenance on Tuesday 5 <sup>th</sup> July.                                                                                                                                       |
| <b>XMLLogPath</b>               | The file system path to log all client XML data uploads. This feature may be used to debug upload problems from the server-side. It should normally be disabled as this feature will impose a performance penalty on the server. The website application pool user (typically Network Service) should have write access to this folder.<br><br>e.g. D:\PMESXML |

## Minimal web.config settings

At a minimum the following settings must be configured:

- **RegisteredOrganisation**
- **RegisteredProductKey**
- **SiteRoot**

In addition, the following settings may need amendment:

- **ConnectionString** – This may need to be changed if the database is located on another server or is not using the default SQL instance
- **SMTPServer, BugEmail and WebsiteEmail** – This will need to be configured if you are using the email error reporting feature

The web.config file also includes some additional settings not described above. These are used internally by PMES and should not normally be changed.

## Configuring User Authentication (Integrated Windows Authentication)

The PMES software supports both native and Windows integrated authentication:

1. **Native mode** - PMES requires an email address and password to authenticate users for non-anonymous reports. The password is stored in an encrypted format in the PMES database.

To enable this mode modify the web.config file setting:

*IntegratedWindowsAuthentication = False*

2. **Windows integrated mode** - PMES uses the Windows credentials supplied by a compatible Windows browser (Internet Explorer, Chrome and Firefox all support this feature). This allows access to be seamlessly linked to a Windows logon and avoids the requirement to store any password information in the PMES database.

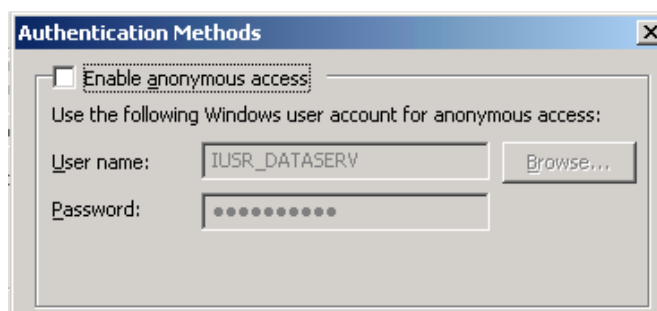
To enable this mode:

- Modify the web.config file setting:

*IntegratedWindowsAuthentication = True*

- On Windows Server 2003: Open IIS Manager and locate the PowerMAN5 website. Right click on the website and select **Properties**.

Navigate to the **Directory Security** tab and press **Authentication and Access Control\Edit**. Confirm that anonymous access is disabled:



- On Windows Server 2008/2012: Open IIS Manager and select the PowerMAN5 website. Navigate to **Authentication** and double click. Confirm that **Anonymous Authentication** is disabled:



## Authentication

| Group by:                | No Grouping |
|--------------------------|-------------|
| Name                     | Status      |
| Anonymous Authentication | Disabled    |
| ASP.NET Impersonation    | Disabled    |
| Basic Authentication     | Disabled    |
| Forms Authentication     | Disabled    |
| Windows Authentication   | Enabled     |

**Tip:** We recommend that the Windows integrated mode (*IntegratedWindowsAuthentication = True*) mode is used where possible. This minimises user logon maintenance requirements.

## Testing Integrated Windows Authentication Mode

PMES includes a diagnostic feature to resolve problems related to Windows Integrated Authentication mode. To confirm this feature is working correctly please proceed as follows:

1. Logon to a client workstation with a Windows user account. Typically this will be the domain account you wish to use for integrated authentication.
2. Open the page <http://yourserver:8080/CurrentIdentity.aspx>
3. Confirm that PMES displays the Windows username of the currently logged on user

## Website Testing

Now that the server has been configured it can be tested. There are several test pages provided to check that the database and website functionality.

Assuming you are testing the server locally you can use the following URL:

<http://localhost:8080/statictest.htm>

This page should display a message indicating that the web server is functioning. If this process is not successful you must check the basic IIS configuration before proceeding further.

**Tip:** If the web server does not display the static test page it may be because you have forgotten to grant the PowerMAN5 application pool read access to the website root folder.

Similarly, after the web server has been checked you can confirm the database is functioning using the following URL:

<http://localhost:8080/servercheck.aspx>

If the system is correctly configured this will report: **Server is available**

**Tip:** If the server does not respond you may need to investigate the cause of the problem. The most common problems are caused by incorrectly configured database connections or security settings. The **servercheck.aspx** page uses a stored procedure called **upServerCheckInfo**. You (or a suitably qualified DBA) can use the **SQL Server Profiler** tool to trace the website access to this procedure and determine the cause of the problem.

If the **servercheck.aspx** page fails to load and the browser reports the page was not found (error 404) this may be because ASP.NET is not correctly configured. Please see the following Microsoft article for a resolution:

<http://support.microsoft.com/kb/315122>

## Checking Website Security

Before proceeding further it is essential to verify the security of the PMES system. Assuming the installation steps above have been followed you can do this as follows from **another** computer (not the server) using arbitrary user credentials:

- Check the page <http://yourserver:8080> is available to any user
- Check the page <http://yourserver:8080/Secure> prompts for a login and is only accessible to the user/group(s) you have selected
- If Windows Integrated Authentication mode is enabled check that the page <http://yourserver:8080/CurrentIdentity.aspx> displays the Windows username of the current logged on user

This step completes the basic configuration of the PMES system. Most day-to-day configuration and management can now be performed using the website itself.

## SMTP Configuration (Email and error reporting)

PowerMAN Enterprise Server allows users to file error reports in the event on a server problem. These are sent by email and may be investigated using the server database and IIS logs. This feature is optional.

To use this feature you must configure the **SMTPServer**, **BugEmail** and **WebsiteEmail** settings in the web.config file. You can test the email notification using a webpage located in the secure area. To use this feature proceed as follows:

1. Navigate to <http://yourserver:8080/Secure/ServerTools.aspx>
2. Click the **Test** link
3. Confirm a test email is delivered (this may take several minutes)

### PowerMAN Power Manager Server 5.3.0.0 Server Tools

Configuration **Server Tools** Error Log

| Setting          | Value                                                                    |
|------------------|--------------------------------------------------------------------------|
| ConnectionString | Data Source=Localhost;Initial Catalog=PowerMAN5;Integrated Security=True |
| SMTPServer       | smtp.companyname.com                                                     |
| BugEmail         | support@datasynergy.co.uk <a href="#">Test</a>                           |

| Parameter                 | Value               |
|---------------------------|---------------------|
| Application Pool Identity | domain\powermanuser |

## Configuring PowerMAN Enterprise Server for your organisation

Before proceeding to configure the system for your own organisation please:

- Obtain a PowerMAN client software product key (this is different to the PMES server PID)
- Decide if you wish to allow anonymous access to view the management reports
- Decide if you wish to use PMES native (email address + password) or Windows integrated user authentication. This is configured with the **WindowsIntegratedAuthentication** setting in the PMES web.config file.
- Decide if you wish to manually create reporting sites (groups) or automatically create them using the workstation's Active Directory tree (requires client 5.2.6 or later)
- Decide which currency to use for reporting estimated energy costs

**Tip:** Anonymous access to the management reporting tool allows the system to be used by a variety of users without configuring a specific login. Anonymous access does not allow any configuration changes to be made. Anonymous access is usually used when customers evaluate the PowerMAN hosted reporting system as it simplifies initial configuration and allows the reporting system to be quickly shared by a number of users.

To configure PMES for your organisation proceed as follows:

1. Open the Secure configuration page: <http://yourserver:8080/Secure>
2. Enter your **organisation name** and PowerMAN **client software** product key
3. Select the appropriate settings for anonymous access and reporting currency
4. Click **Create**

### PowerMAN Power Manager Server Configuration

|               |              |           |
|---------------|--------------|-----------|
| Configuration | Server Tools | Error Log |
|---------------|--------------|-----------|

|                       |                             |
|-----------------------|-----------------------------|
| Licensed Organisation | Example Corporation Limited |
| License Expiry        | 30/04/2009                  |
| License Limits        | 100 computers               |
| Registered            | 0 computers                 |



## Configuring Organisation Logins (Access levels)

PowerMAN Enterprise Server allows you to configure three distinct user access levels:

- **Anonymous Viewing** – Allows any user to use reporting features but not change the system configuration. To access the system the user must know the reporting URL. This feature may be disabled.
- **Viewing Only** – As above but requires pre-authorised user logon
- **Site Administration** – Allows the user to use the reporting features AND to further configure the system.

If you have opted to enable anonymous access this means that the anonymous user (without a specific login) has the Viewing Only access level.

### Organisation Configuration

| Organisation                                | Product Key                                   | Created    | Expires    |                                                                                             |
|---------------------------------------------|-----------------------------------------------|------------|------------|---------------------------------------------------------------------------------------------|
| <a href="#">Example Corporation Limited</a> | <a href="#">HYJK-DBBY-XGHK-GABQ-GQKK-UJKL</a> | 31/03/2008 | 31/03/2009 | <a href="#">Logins</a> <a href="#">Rename</a> <a href="#">Access</a> <a href="#">Delete</a> |

To create a new user login proceed as follows:

1. Click **Logins**
2. Enter the required login email address and password (or a qualified username if using Windows integrated authentication)
3. Select an appropriate access level
4. Click **Create**

### Example Corporation Limited Logon Administration

#### Create New User Logon

|                                       |                                               |
|---------------------------------------|-----------------------------------------------|
| Email Address                         | <input type="text" value="user@example.com"/> |
| Initial Password                      | <input type="password" value="....."/>        |
| Access Level                          | <input type="text" value="Viewing Only"/> ▼   |
| <input type="button" value="Create"/> |                                               |

**Tip:** When Windows integrated mode is enabled the qualified user name should be entered instead of an email address (no password is required). This is of the format:

*domain\username*

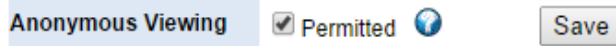
A helper page is provided to display the current qualified user name as communicated by the browser. Please visit the following page to display the current logon:

<http://yourserver:8080/currentidentity.aspx>

## Configuring Anonymous Access

To change the anonymous access feature proceed as follows:

1. Open the **Configuration Tab**
2. Select the appropriate viewing setting (and optionally update sub-sites):



3. Click **Save**

## Configuring Automatic Site Creation

PMES allows reporting sites (groups) to be manually created or automatically created based upon the workstation Active Directory tree. This feature requires client version 5.2.6 or later. The reporting site is created based upon the workstations AD 'distinguished name (DN)'. For instance the computer PC2723 could have the DN:

*CN=PC2723,OU=Workstations,OU=Management,OU=Head Office Staff,OU=Departments,DC=Customer,DC=local*

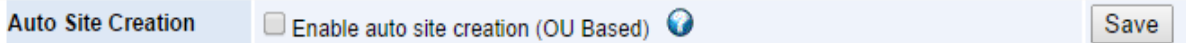
This would place the workstation in the following reporting location:

*Root -> Departments -> Head Office Staff -> Management -> Workstations*

When automatic site creation is enabled PowerMAN will automatically generate any necessary reporting sub-sites and arrange them accordingly. This feature is disabled if the workstation is located within a sub-site that has auto move disabled.

To enable this feature proceed as follows:

1. Click the organisation name. This will open the root site summary page.
2. Open the **Configuration Tab**
3. Locate the **Auto Site Create** feature



4. Select **Enable auto site creation**
5. Click **Save**

## PMES Server Error Log

PMES includes an error log feature. This is accessible from the /Secure area and records both minor and serious server errors for later review. This feature can be useful for debugging PMES configuration problems.

**TIP:** It is quite normal for some client upload operations to timeout during busy periods or when only partial data is uploaded. These errors are typically associated with PostStatus.aspx. Please contact Data Synergy Technical for further information on specific error messages.

### PowerMAN Power Manager Server Error Log

Configuration | Server Tools | **Error Log**

**Important:** The error log is for Technical Support use. It is normal for some errors (especially PostStatus data upload timeouts) to be logged during normal operation. This does not indicate a fault.

| <a href="#">Export</a> Show last <input type="text" value="20"/> errors from: <input type="text" value="07/08/2010"/> until <input type="text" value="14/08/2010"/> <input type="button" value="Refresh"/> |              |                                                                                                |                                                                                                                                                                                                                                                                                                           |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Date/Time                                                                                                                                                                                                  | FunctionName | Description                                                                                    | ExtraInfo                                                                                                                                                                                                                                                                                                 |
| 14/08/2010 20:18:44                                                                                                                                                                                        | Throw        | <a href="#">Unexpected end of file while parsing Name has occurred. Line 16, position 841.</a> | <a href="http://pmstats.org:8080/PostStatus.aspx?ClientGUID={4f3a2f9b-a3bf-4f3a-b7cd-0019d1561109}&amp;SiteGUID={4f3a2f9b-a3bf-4f3a-b7cd-35b23c9eb8ae}">http://pmstats.org:8080/PostStatus.aspx?ClientGUID={4f3a2f9b-a3bf-4f3a-b7cd-0019d1561109}&amp;SiteGUID={4f3a2f9b-a3bf-4f3a-b7cd-35b23c9eb8ae}</a> |
| 14/08/2010 19:41:38                                                                                                                                                                                        | Throw        | <a href="#">Unexpected end of file while parsing Name has occurred. Line 16, position 841.</a> | <a href="http://pmstats.org:8080/PostStatus.aspx?ClientGUID={4f3a2f9b-a3bf-4f3a-b7cd-0019d1561109}&amp;SiteGUID={4f3a2f9b-a3bf-4f3a-b7cd-35b23c9eb8ae}">http://pmstats.org:8080/PostStatus.aspx?ClientGUID={4f3a2f9b-a3bf-4f3a-b7cd-0019d1561109}&amp;SiteGUID={4f3a2f9b-a3bf-4f3a-b7cd-35b23c9eb8ae}</a> |

## Temporary Website Maintenance (Server Offline)

PowerMAN Enterprise Server incorporates a simple feature that can be used to notify users if the server is temporarily unavailable for maintenance. You may wish to enable this feature if you are performing a software upgrade or other maintenance task. To notify users proceed as follows:

1. Locate the **App\_Offline.xxx** file in the root of the website
2. Rename it to **App\_Offline.htm**
3. Remember to rename the file to App\_Offline.xxx when your offline task is complete

This technique is explained further in the following Microsoft document:

<http://msdn.microsoft.com/en-us/library/bb398992.aspx>

## SQL Database Optimization and maintenance

There are several additional steps required to ensure reliable and optimal functioning of the PMES MS SQL database:

- Database backup strategy
- Database optimization strategy
- Database configuration

### Database Backups

As supplied the PowerMAN5 database is configured to use the **Simple Recovery Model**. This model is the easiest to configure but will result in some data loss in the event of a server malfunction. The Simple Recovery Model creates a database backup as configured in the server schedule (typically daily). Whilst very simple to understand and configure any data changes, between backups, are lost in the event of a server problem. In many scenarios the minor discontinuity in the logged data that would result from a malfunction may be acceptable.

The **PowerMAN Hosted Service** is configured to provide the maximum data reliability and therefore uses the **Full Recovery Model**. This stores separate database and transaction log backups to an alternative physical location and means that it is possible to restore all database changes since the last full backup. This approach, although more complicated, may also be appropriate for your system.

The following Microsoft article provides additional guidance on selecting the appropriate backup strategy:

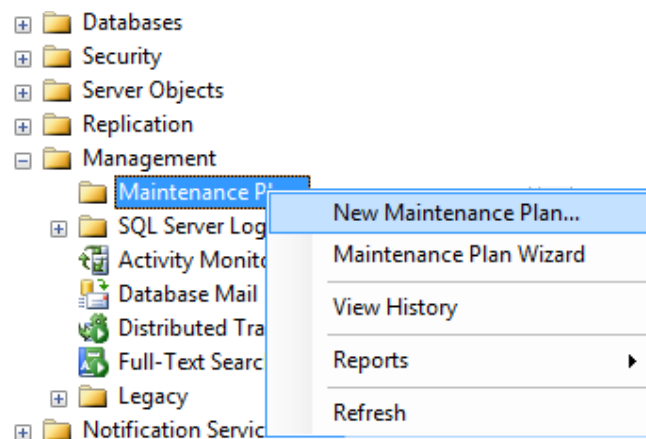
<http://msdn.microsoft.com/en-us/library/aa173531.aspx>

**You must decide the appropriate database backup strategy for your PMES deployment.**

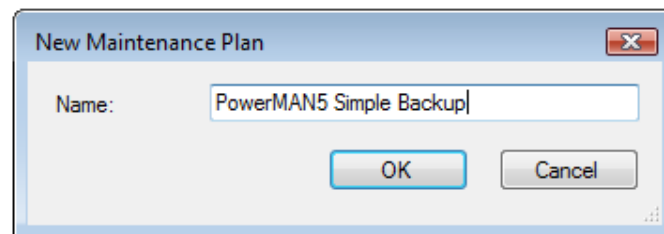
The following steps describe a procedure to configure regular backups using the Simple Recovery Model:

1. Open SQL Server Management Studio
2. Navigate to Management\Maintenance Plans
3. Right click and select New Maintenance Plan

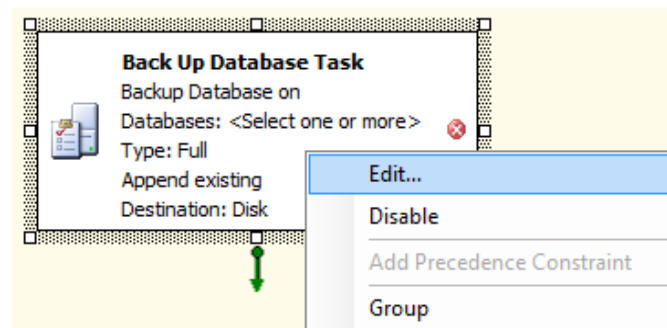
## PowerMAN Enterprise Server v5.3



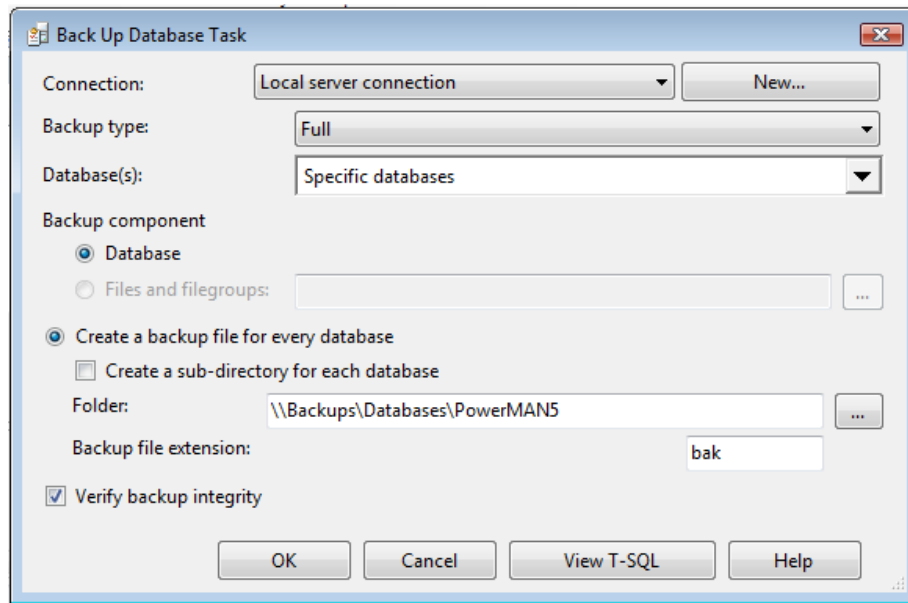
4. Enter an appropriate plan name: **PowerMAN5 Simple Backup**



5. Drag the 'Backup Database Task' to the main pane (located bottom right)
6. Right click on the task and select Edit



7. Select the PowerMAN5 database
8. Select an appropriate backup location e.g. [\\Backups\Databases\PowerMAN5](#)
9. Click OK



10. Click the Calendar icon

11. Select an appropriate backup schedule and click OK. (Typically the backup should occur once per day)

**Important:** Adequate database backups are essential to avoid unacceptable data loss. You are responsible for configuring a suitable backup strategy. When configuring the backup system you should consider the possibility of hardware failure on the server. You can mitigate this problem by configuring the backup to a remote location. The ideal time to configure a backup is between 8 and 10pm. This is usually after most client computers have been switched off and before midnight when any active computers will start to report data.

It is not necessary to keep historic backups forever and in practice only the last few backups (for instance the last 7 days) need to be retained.

## Database Optimisation

The PowerMAN database makes extensive use of indexes to improve performance. Over time these can become fragmented which can lead to a decrease in performance and website timeouts. It is good practice to periodically optimize these indexes. This can be done either by reorganising or rebuilding the indexes. Each technique has both advantages and disadvantages. These are discussed further in the following Microsoft article:

[http://msdn.microsoft.com/en-us/library/aa964133\(SQL.90\).aspx](http://msdn.microsoft.com/en-us/library/aa964133(SQL.90).aspx)

The most appropriate technique will depend upon the size of your PowerMAN database and the level of index fragmentation. The following procedure explains how to configure the indexes to rebuild once per week. This technique, which will make the database temporarily inaccessible, is the simplest technique to ensure optimal performance.

**You must determine the most appropriate database optimisation technique for your server. This decision is primarily determined by the size of the database and the amount of database downtime you will accept.**

To configure the database to rebuild the indexes once per week proceed as follows:

## PowerMAN Enterprise Server v5.3

1. Open SQL Server Management Studio
2. Navigate to Management\Maintenance Plans
3. Right click and select New Maintenance Plan
4. Enter an appropriate plan name: **PowerMAN5 Index Task**
5. Drag the 'Rebuild Index Task' to the main pane
6. Right click on the task and select Edit
7. Select the PowerMAN5 database
8. Select Tables and Views and click OK
9. Click the Calendar icon
10. Select an appropriate backup schedule and click OK. (Typically the index rebuild should occur once per week)

**Important:** It is easy to overlook the importance of effective index optimization. The strategy above is probably excessive for most standard databases but will result in regularly optimized databases indexes. As the database may be inaccessible during the index rebuild operation this task should normally be carried out during a regular maintenance period or when the server is not required.

## Database Server Configuration

PMES is designed to have low hardware resource requirements. Smaller PMES systems (<10,000 workstations) may use SQL Express edition and run with satisfactory performance using a default configuration on desktop (rather than server) class hardware. In such installations no specific database server configuration is required.

In larger PMES systems (database >10GB) it is necessary to use SQL Standard (or Enterprise) edition. In such installations a significant performance improvement may be obtained by correctly configuring the SQL server. The improvement achievable through careful configuration can be several times greater than that obtainable from higher performance server hardware alone. Depending upon system scale the following best practices may deliver significant advantages:

- PMES and TempDB database and transaction log files be located on physically separate drives.
- Backups run during non-peak times (typically after 6pm and before midnight)
- Server RAM be at least 4GB (10,000 workstations), 8 GB (25,000 workstations) or 16GB (50,000 workstations and above)
- All drives have ample free space
- The SQL server is used for SQL alone and no other services (e.g. not IIS, AD etc)

Please contact Data Synergy Technical Support if you require any further advice.

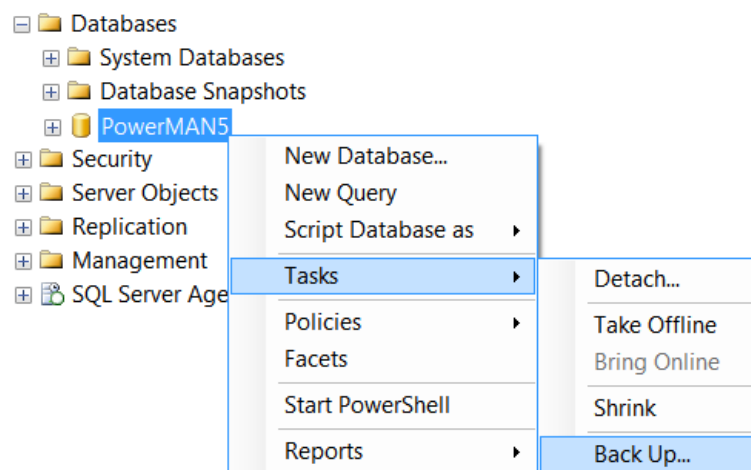


## PowerMAN Enterprise Server v5.3

### Manual SQL Database Backup

The PowerMAN SQL database may be manually backed up at any time by following the procedure below:

1. Open SQL Server Management Studio
2. Navigate to Databases\PowerMAN5
3. Right click and select Tasks\Back Up



4. Select Backup type: **Full**
5. Click **Add**
6. Select an appropriate backup destination folder
7. Enter an appropriate backup name: **PowerMAN5-Full Database Backup**
8. Click **OK**

Source

Database: PowerMAN5

Recovery model: FULL

Backup type: Full

☐ Copy-only Backup

Backup component:

☒ Database

☐ Files and filegroups:  ...

Backup set

Name: PowerMAN5-Full Database Backup

Description:

Backup set will expire:

☒ After: 0 days

☐ On: 01/03/2012

Destination

Back up to: ☒ Disk ☐ Tape

d:\PowerMAN5.bak

**TIP:** SQL Database backup files can be quite large. Often they will compress very significantly using tools such as ZIP or WinRAR. Please compress SQL backup files before sending them to Data Synergy Technical Support.

## Troubleshooting PowerMAN Enterprise Server

PowerMAN Enterprise Server (PMES) has undergone many thousands of hours of development and testing. The software is very reliable but problems do sometimes happen. This walkthrough installation in this document makes some basic assumptions about the PMES deployment environment and, in a real-world deployment; additional complications may cause configuration problems. This section describes common problems, how to investigate, and ultimately resolve them.

**Tip:** For security reasons the web.config file supplied with PMES is configured to display only limited client error messages. If you experience problems with the PMES website it can be very helpful to view the problem pages directly on the web server via <http://localhost:8080/>. If this is not practical you can **temporarily** configure additional error messages to be displayed on client browsers by changing the following setting in the web.config file:

```
customErrors mode="RemoteOnly" -> customErrors mode="Off"
```

**Please remember that this step will expose your system to additional security threats and should only be performed in a controlled environment.**

### Problem: Static test page is not displayed

### Problem: Website reports – The page cannot be found

### Problem: Website reports – Server Application Unavailable

The static test page (statictest.htm) is provided to test the basic functionality of the web server. It does not use the SQL database and therefore avoids the additional complications that can occur due to database connectivity problems. If this page does not display please check the following:

- The application pool identity (usually Network Service) has read access to the folder containing the website. If you have configured the application pool to use a domain user account then this account must have read access to the website.
- The server firewall (if running) allows access to the web server (usually port 8080)
- There may be additional useful information in the System and Application event logs

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### **Problem: Website reports - The current identity does not have write access to ...Microsoft.NET\Framework\v2.0.50727\Temporary ASP.NET Files**

This message can be displayed if the Internet Information Service (IIS) was installed after the .NET framework. This problem indicates that the .NET framework is not correctly registered with IIS. You can correct this problem by executing the following OS specific command:

**32-bit OS:** %windir%\Microsoft.NET\Framework\v2.0.50727\aspnet\_regiis.exe -i

or

**64-bit OS:** %windir%\Microsoft.NET\Framework64\v2.0.50727\aspnet\_regiis.exe -i

If this step is necessary please also remember to check that the correct .NET framework is configured for the website (in the ASP.NET tab).

### **Problem: Servercheck.aspx takes excessive time (>1 second) to display Problem: Servercheck.aspx reports - An error has occurred while establishing a connection to the server (or similar)**

This class of problem is usually associated with database connectivity issues. This may be because the database server is not accessible or because the security configuration is incorrect. The following may be helpful:

- If the problem is sporadic please consider other tasks the server may be doing. If the computer hosting the SQL server is used for other services please consider providing a separate sever for the PowerMAN database. The database must reliably respond in <5 seconds for PowerMAN clients to be able to successfully log data.
- Check the network connection from the IIS server to the SQL server
- Check the application pool identity (usually Network Service for local databases and a domain user account for remote databases) is a member of the Website database role.
- Disable 'friendly' error messages (see below) and review the detailed error data reported. It may also be helpful to check tblErrorLog in the PowerMAN5 database.

**Problem: Website reports - Sorry. A website error was detected. This cause of this error has been logged and will be investigated**

This error is generated when the PMES software encounters an error. The most common cause of this problem is a timeout accessing the database. This can happen due to incorrect database configuration or under very heavy database load conditions. PowerMAN logs most errors (except timeouts) in the tblErrorLog database table. You can query this table to determine the cause of the error.

To investigate the cause of this error further you can also disable the 'friendly' error message and configure PMES to display the full error message. This information may be useful to Technical Support.

To display detailed error information:

- Edit the web.config file and change the value of the FriendlyErrorHandler to 'False'. This will allow detailed error reports to be displayed on the server console.
- To enable display detailed error information on remote browsers (not necessary for localhost) you can edit the web.config file and change the customErrors 'mode' setting from "RemoteOnly" to "Off".

Please remember that both of these changes will make the PMES server less secure. They should only be performed under controlled conditions and certainly not when the PMES server is accessible from the internet.

**Problem: Non-specific database connectivity problem**

Database connectivity issues can sometimes be difficult to resolve. The basic PMES configuration is quite simple but complexity can dramatically increase if the SQL server is located in a remote location or either server is shared with other services.

To re-cap, the general configuration is normally as follows:

1. The website is run in the context of a separate application pool
2. This application pool uses a specific user account (often Network Service).
3. The user account must have Read access to the website root folder
4. The user account must be a member of the Website database role

You can investigate connectivity problems using a combination of the following steps:

- Check the basic configuration above. In particular confirm the identity used for the application pool and that this user account has the necessary file system and database access
- If you have recently made configuration changes it can sometimes help to recycle the application pool and restart the IIS service. This is described elsewhere in this document.
- Use the <http://localhost:8080/secure/ServerIdentity.aspx> to confirm the identity that the web server is currently using. This should match that configured in the application pool
- Use the <http://localhost:8080/ServerCheck.aspx> page to confirm the database connection is operational

## PowerMAN Enterprise Server v5.3

- Use the SQL Server Profiler tool to monitor the IIS interaction with the SQL server. This can often expose security related problems.
- If PMES displays the 'friendly' error page consider disabling this feature (see above) to see more detailed error information.

### **Problem: Website reports - Could not load file or assembly 'PowerLib' or one of its dependencies. An attempt was made to load a program with an incorrect format**

This error is reported when there is a mismatch between the installed website and the server hardware. Please check that the installed website platform (x86 or x86-64) matches your server hardware. If necessary replace the website with the correct version.

### **Problem: Website displays - Service Unavailable**

This message is displayed when the PowerMAN5 application pool is incorrectly configured. This message may also be displayed if the application pool has recently been re-configured to use a domain user account. Please check the following:

- The application pool identity is correctly configured. If a domain user account is being used try re-entering the password.
- The application pool identity (domain user) is a member of the local **IIS\_WPG** group
- After making any changes you can restart the application pool by right clicking on it and selecting **Recycle**.
- Similarly it can sometime help, after making several related changes, to restart the website or even IIS itself. This can be done by right clicking on the site and selecting **Stop** and then **Start**. To restart IIS right click on Internet Information Services and select **All Tasks/Restart IIS**
- There may be additional useful information in the System event log

### **Problem: The website reports an exception obtaining permission of type 'System.Web.AspNetHostingPermission'**

This problem can occur on Windows 2008 (IIS7). It can be problematic to resolve because unless **customErrors** setting has been modified it is only displayed when the web page is viewed on the local server.

This problem occurs when the SQL database is located on a remote server and the application pool is operating under the identity of a domain user. To resolve the problem change the application pool setting **Load User Profile** to **True**.

|                          |      |
|--------------------------|------|
| Idle Time-out (minutes)  | 20   |
| Load User Profile        | True |
| Maximum Worker Processes | 1    |

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### **Problem: Computers appear to be reporting correctly but are not showing on the reporting system OR The SQL database contains data but this is not visible in the web-based reports**

This problem can happen if the SiteGUID being used by client computers is not registered on the server. In this situation data is still logged correctly but is not displayed.

To register a SiteGUID with the system proceed as follows:

- Login to the reporting system (or click 'Super User' on the secure administration page)
- Navigate to the site you wish to use as the parent of the new site-site
- Click **Add / Move Site**
- Enter the new SiteGUID including the {braces} and a suitable site name
- Click **Add / Create Site**

### **Problem: "The page cannot be found" error message when you request an ASPX page OR "HTTP Error 404 - File or Directory not found" error message when you request an ASPX page**

This problem can happen if ASP.NET was installed prior to IIS. This happens because, by default, when IIS is installed on any version of the Windows Server 2003 family, IIS only serves static content (HTML).

Support for ASP.NET must be manually enabled on such systems. This problem does not generally happen on later operating systems or when ASP.NET is installed after IIS. To resolve this problem first check that the .NET Framework is registered in IIS with the following OS specific command:

**32-bit OS:** %windir%\Microsoft.NET\Framework\v2.0.50727\aspnet\_regiis.exe -i

or

**64-bit OS:** %windir%\Microsoft.NET\Framework64\v2.0.50727\aspnet\_regiis.exe -i

If the problem persists please follow the instructions in the following Microsoft article:

<http://support.microsoft.com/kb/315122>

## PowerMAN Enterprise Server v5.3

**Problem: “Server Error / in application” error message when you request an ASPX page**

**OR “Could not load file or assembly System.Core, Version=3.5.0.0” error message when you request an ASPX page**

**OR Child nodes are not allowed <ProviderOption name='CompilerVersion' value='v3.5' />**

This problem occurs when the Microsoft .NET 3.5 Framework is not installed. This component can be downloaded and installed for Windows Server 2003 from the following address:

<http://www.microsoft.com/downloads/en/details.aspx?FamilyID=ab99342f-5d1a-413d-8319-81da479ab0d7>

Sometimes confusion can arise because whilst the PMES website requires .NET v3.5 this framework is itself based upon the v2.0 Common Language Runtime. In practice this means that the v3.5 framework must be installed but the .NET version configured in IIS must be set to v2.0.

In Windows Server 2008/2012 the .NET 3.5 Framework is available as an optional Windows setup feature. To install this feature start the ‘Add Features Wizard’ and select the .NET Framework Features component.

**Problem: “The application has failed to start because its side-by-side configuration is incorrect. Please see the application event log or use the command-line sxstrace.exe tool for more detail. Exception from HRESULT: 0x800736B1” error message when you request an ASPX page**

This problem occurs when the Microsoft Visual C++ Runtime is missing from the server. This is normally present on most systems and may indicate that the .NET 3.5 Framework is not installed. Please see above for instructions on how to install this Windows component.

If the .NET Framework is installed then it may be necessary to download and manually install the runtime appropriate for your platform:

Microsoft Visual C++ 2008 SP1 Redistributable Package (x86 32-bit):

<http://www.microsoft.com/downloads/en/details.aspx?familyid=a5c84275-3b97-4ab7-a40d-3802b2af5fc2>

Microsoft Visual C++ 2008 SP1 Redistributable Package (x64 64-bit):

<http://www.microsoft.com/downloads/en/details.aspx?familyid=ba9257ca-337f-4b40-8c14-157cfdffee4e>

If the problem continues after installing the appropriate runtime package Data Synergy Technical Support will be able to help you diagnosis the problem further. Please contact Technical Support with a SxSTrace log file. This may be generated as follows:

1. Start an command prompt (elevated on Windows Server 2008 and later)
2. Enter the command:

```
SXSTRACE trace -logfile:sxstrace.etc
```



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NB: This will leave a prompt on-screen reminding you to press [Enter] to stop the logging. Please do not shut this window.

3. Refresh the browser and confirm the error is still present
4. Return to the command prompt window and press [Enter] to stop the SXSTRACE trace
5. Enter the command:  
  

```
SXSTRACE parse -logfile:sxstrace.etl -outfile:sxstrace.txt
```
6. The 'sxstrace.txt' file now contains readable log file. Please send this to technical Support.

### **Problem: How do I migrate from the PowerMAN hosted reporting system to the (on-premise) PowerMAN Enterprise Server system?**

Many organisations use the hosted PowerMAN reporting system for either evaluation purposes or as a complete live system. The hosted platform has many advantages and is generally cost effective for organisations with less than approximately 2,000 computers. In some situations it may be desirable to move from the hosted environment to the on-premise PowerMAN Enterprise Server (PMES) system. Data Synergy offer a free data transfer service for customers upgrading to PMES. The following procedure explains the transfer procedure for a live installation that is currently using the hosted reporting platform:

Setup your own PMES server using the blank database supplied.

1. Confirm the system is working with test data. The simplest way to do this is to manually configure a single PC to report to the server using Local Group Policy. Confirm the PMES server is working satisfactorily
2. Stop the IIS server e.g. not accepting data from clients. Confirm that the website is inaccessible
3. Prevent the clients from reporting to the hosted system. The best way to do this (if possible) is via the external firewall by blocking pmstats.org. If this is not possible please contact Technical Support
4. Confirm that data has stopped flowing to the hosted system - this should happen instantly
5. Ask Data Synergy Technical Support to prepare a database export
6. Restore the exported database to your SQL server replacing the test database previously used
7. Update the client settings to use the new (private) reporting server
8. Allow clients to start reporting to private server. This will happen after the next client reboot or PowerMAN service restart

**NB: The most important step is point 2. This is vital to ensure that the changeover is clean. There are 28 days (by default) from this point before there is any risk of data discontinuity.**

## PowerMAN Enterprise Server v5.3

### **Problem: How do I migrate from the (on-premise) PowerMAN Enterprise Server reporting system to the hosted PowerMAN reporting system?**

Data Synergy offer a free data transfer service for customers transferring to the hosted reporting system from PMES. The following procedure explains the transfer procedure for a live installation that is currently using PMES. The procedure is very similar to that described above for transfer to PMES:

1. Disable your existing PMES server. The easiest way to do this is to disable the IIS website or block traffic with the server's local firewall
2. The client software will continue to record data locally and periodically attempt to transfer this to the server. This is harmless. Do NOT configure your client software to report to our hosted system just yet
3. Backup your local PMES database and compress it (ZIP is ideal)
4. Email Data Synergy Technical Support the compressed database. If the database is too large to email please contact Technical Support for advice
5. We will extract the data from your database and load it into the hosted system
6. We will then confirm the hosted system is ready to accept data from your deployment
7. Update the client settings to use the new hosted reporting platform (pmstats.org)
8. Allow clients to start reporting to hosted system (for instance by unblocking the external firewall). Data will start to flow after the next client reboot or PowerMAN service restart

**NB: The most important step is point 2. This is vital to ensure that the changeover is clean. There are 28 days (by default) from this point before there is any risk of data discontinuity.**

### **Problem: How do I migrate a PowerMAN Enterprise Server (PMES) system from one server to another?**

To move the PowerMAN PMES IIS web component to another IIS server proceed as follows:

1. Disable your existing PMES server. The easiest way to do this is to disable the IIS website or block traffic with the server's local firewall
2. Install PMES on the new server following the instructions in the Platform Installation Guide
3. Configure the appropriate settings (including SQL database 'connection string') in the web.config file
4. Update the client settings to use the new reporting server address
5. Allow clients to start reporting to hosted system. This will happen after the next client reboot or PowerMAN service restart

**NB: The most important step is point 1. This is vital to ensure that the changeover is clean. There are 28 days (by default) from this point before there is any risk of data discontinuity**

To move the PowerMAN SQL database to another SQL server proceed as follows:

1. Disable your existing PMES server. The easiest way to do this is to disable the IIS website or block traffic with the server's local firewall
2. Backup the SQL database following the instructions in the PMES Platform Installation Guide
3. Restore the database to the new SQL server
4. Update the SQL database 'connection string' in the web.config file to point to the new SQL server
5. Re-enable the PMES server (for instance restart the website)

## PowerMAN Enterprise Server v5.3

**Problem: Website reports error 'HTTP Error 500.19 – Internal Server Error. The requested page cannot be accessed because the related configuration data for the page is invalid.' or similar**

**OR Website reports error 'Handler Not yet determined, Error Code 0x80070021'**

**OR Website reports error 'Handler Not yet determined, Error Code 0x80070005'**

This problem occurs when a ASP.NET configuration section is locked at the parent level. Locking is either by default (overrideModeDefault='Deny'), or set explicitly by a location tag with overrideMode='Deny' or the legacy allowOverride='false'.

To correct the problem modify the applicationHost.config file as follows:

1. Confirm you are logged on with administrator rights
2. Browse to C:\Windows\System32\inetsrv\config
3. Open applicationHost.config with Notepad or similar
4. Find the "handlers" section reported by the error message
5. Change the overrideModeDefault attribute to be "Allow"
6. Save the file

The resulting configuration line will now be similar to:

```
<section name="handlers" overrideModeDefault="Allow" />
```

This problem can also occur (with error code 0x80070005) when the Application Pool Identity (typically Network Service) does not have read access to the web site folder.

**Problem: Windows Integrated Authentication Mode does not work as expect**

**OR PMES reports 'Unknown User' when Windows Integrated Authentication Mode is enabled**

**OR The/CurrentIdentity.aspx page displays no username when Windows Integrated Authentication Mode is enabled**

This problem can occur when Anonymous Windows authentication is enabled. To disable this proceed as follows:

- On Windows Server 2003: Open IIS Manager and locate the PowerMAN5 website. Right click on the website and select **Properties**. Navigate to the **Directory Security** tab and press **Authentication and Access Control>Edit**. Confirm that anonymous access is disabled (unticked).
- On Windows Server 2008/2012: Open IIS Manager and select the PowerMAN5 website. Navigate to **Authentication** and double click. Confirm that **Anonymous Authentication** is disabled.

**Problem: The PMES website does not operate correctly with Internet Explorer 10**

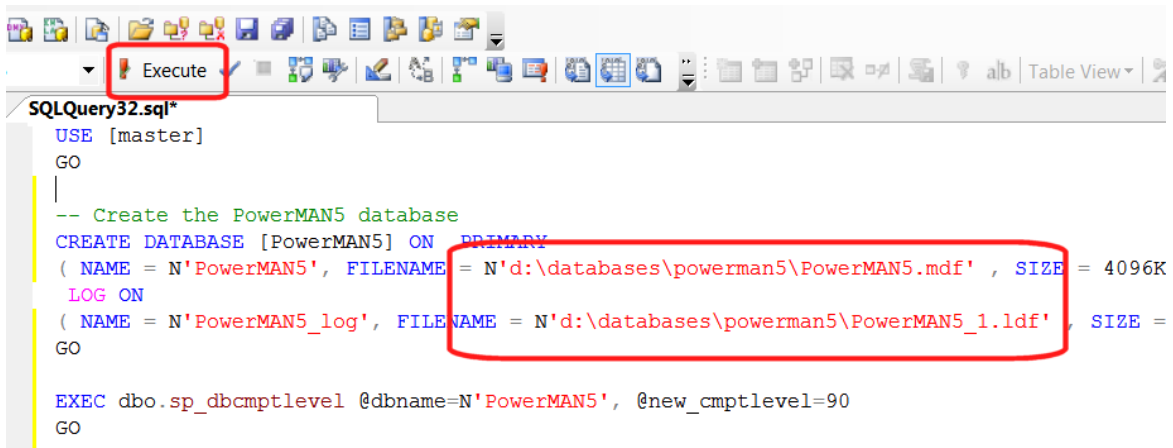
This problem can occur if the Windows server hosting PMES has not been updated. IE10 is not recognised by the built-in ASP.NET browser definition files. This problem can be resolved by installing any pending Windows updates. The specific update that resolves this problem is available from the following link:

<http://support.microsoft.com/kb/2600088>

## Appendix A: PowerMAN5 Database Creation Script

Advanced SQL administrators may wish to create the PowerMAN5 database using a SQL script rather than by restoring the pre-supplied database backup file. A script is supplied in the **advanced** folder of the PMES distribution. To create the databases using a scripted method proceed as follows:

1. Open SQL Server Management Studio
1. Open the supplied **PM53 Create.sql** script file. This is located in the **Advanced** folder of the PMES distribution.
2. Amend the database and transaction log file locations as required (see diagram below)  
  
NB: In larger deployments (>10,000 workstations) we would recommend best practice is to place these files on separate physical disks. This is not necessary on smaller deployments.
3. Click **Execute**
4. Confirm no error messages are reported
5. Perform the steps described in the **Database Login Configuration** section above. This will add the user used for the IIS website application pool to the PowerMAN5 database 'website' role
6. Perform the subsequent website configuration steps described above



```
SQLQuery32.sql*
USE [master]
GO
-- Create the PowerMAN5 database
CREATE DATABASE [PowerMAN5] ON PRIMARY
( NAME = N'PowerMAN5', FILENAME = N'd:\databases\powerman5\PowerMAN5.mdf' , SIZE = 4096K
LOG ON
( NAME = N'PowerMAN5_log', FILENAME = N'd:\databases\powerman5\PowerMAN5_1.ldf' , SIZE =
GO
EXEC dbo.sp_dbcmptlevel @dbname=N'PowerMAN5', @new_cmptlevel=90
GO
```

## Appendix B: PowerMAN5 Upgrade Procedure (v5.2.x to v5.3)

To upgrade from PowerMAN Enterprise Server v5.2.x to v5.3 it is necessary to update both the website and the underlying PowerMAN database.

To upgrade the website please follow the procedure below:

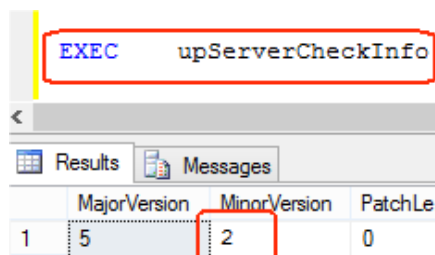
1. Backup the existing website and, if possible, print the web.config file
2. Delete the existing website
3. Follow the procedure above to install a new PMES v5.3 website and configure it appropriately. In some cases it may be useful to refer to the previous web.config file.
4. Temporarily disable the website (for instance, stop it using IIS Manager or use the Offline.htm file) before proceeding with the database update below.

Scripts are supplied in the **Advanced** folder of the PMES distribution to update the PowerMAN database. To update the database please proceed as follows:

1. Confirm the website has been temporarily disabled
2. Open SQL Server Management Studio
3. Determine the name of the existing PowerMAN database. It is normally called PowerMAN5. If the database name is not PowerMAN5 then each update script must be amended accordingly. This is explained further below.
4. Right click on the database and select **New Query**
5. Enter the command:

```
EXEC upServerCheckInfo
```

6. Click **Execute**
7. Confirm the database is version 5.2. **This update is NOT suitable for versions earlier releases:**



|   | MajorVersion | MinorVersion | PatchLe.. |
|---|--------------|--------------|-----------|
| 1 | 5            | 2            | 0         |

8. Backup the existing database to a safe location
9. Open the supplied **PM53 Upgrade Phase 1.sql** script file. This is located in the **Advanced** folder of the PMES distribution.
10. If necessary amend the database [name], contained in square brackets, located at the top of the script (see diagram below):

```
/*
PowerMAN Enterprise Server Upgrade Script - Phase #1

Update PMES 5.2.x DB to 5.3.0 DB

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Note: This procedure may take several hours to complete or even longer for v
During this process a significant transaction log will be generated. It is :

a. Backup the database before starting
b. Ensure a minimum of 6-8x the current database size of free space is avail

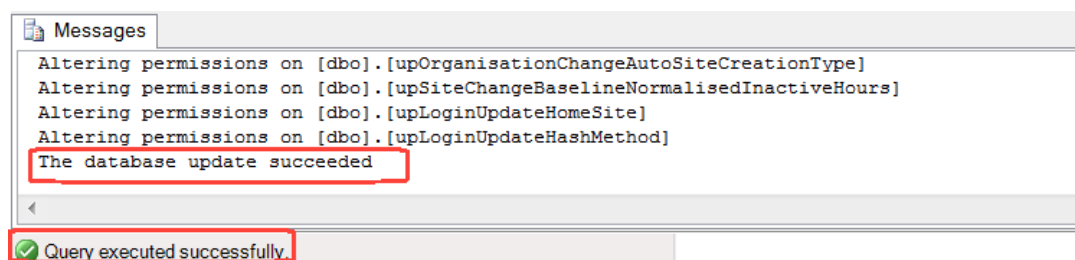
*/

USE [PowerMAN5]
GO
```

11. Click **Execute**

12. Allow the update to proceed - This may take some time on a larger database. Do not cancel the update.

13. Confirm no error was reported:



14. Open the supplied **PM53 Upgrade Phase 2.sql** script file

15. If necessary amend the database name located at the top of the script:

```
/*
PowerMAN Enterprise Server Upgrade Script - Phase #2

Update PMES 5.2.x DB to 5.3.0 DB

This script performs the following:

a Remove default values used during upgrade from tblClientStatusDetail
b. Ensures all passwords are stored in hash format
c. Regenerates all summary data in v5.3 format

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*/

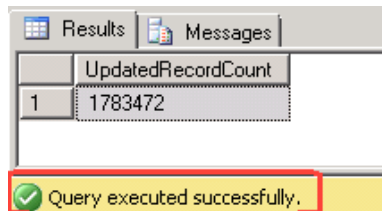
USE [PowerMAN5]
GO
```

16. Click **Execute**

## PowerMAN Enterprise Server v5.3

17. Allow the update to proceed - This may take some time on a larger database. Do not cancel the update.

**Tip:** On a medium specification server with 10,000 registered workstations that had been collecting data for 2 years this update took around 1 hour. Please be patient.



The screenshot shows a database query results window with two tabs: 'Results' and 'Messages'. The 'Results' tab is active, displaying a table with one column 'UpdatedRecordCount' and one row with the value '1783472'. Below the table, a yellow status bar with a green checkmark icon and the text 'Query executed successfully.' is visible.

| UpdatedRecordCount |
|--------------------|
| 1783472            |

Query executed successfully.

19. Re-enable the PowerMAN website
20. Confirm the database and website function as expected

**Tip:** The database upgrade is an advanced operation and may take some time to execute. If you are not familiar with Microsoft SQL please contact Technical Support for assistance.



## Appendix C: Very large (>50k workstations) deployments

In very large PowerMAN deployments we recommend that the following SQL database script is executed prior to production deployment.

This modifies the PMES database to conservatively support over 50,000 workstation data years (the data generated by 50,000 workstations in one year). This modification has a small server performance penalty and is therefore not enabled by default. This modification is not recommended for systems with less than 10,000 workstations.

To perform this update proceed as follows:

1. Open SQL Server Management Studio
2. Open a new query window
3. Paste in the SQL script below
4. Click Execute
5. Confirm no error messages are reported

```
USE PowerMAN5
GO
```

```
ALTER TABLE tblClientStatusDetail
DROP CONSTRAINT PK_tblClientDetail
```

```
ALTER TABLE tblClientStatusDetail
ALTER COLUMN ClientStatusDetailId BIGINT NOT NULL
```

```
ALTER TABLE tblClientStatusDetail
ADD CONSTRAINT PK_tblClientDetail PRIMARY KEY (ClientStatusDetailId)
```

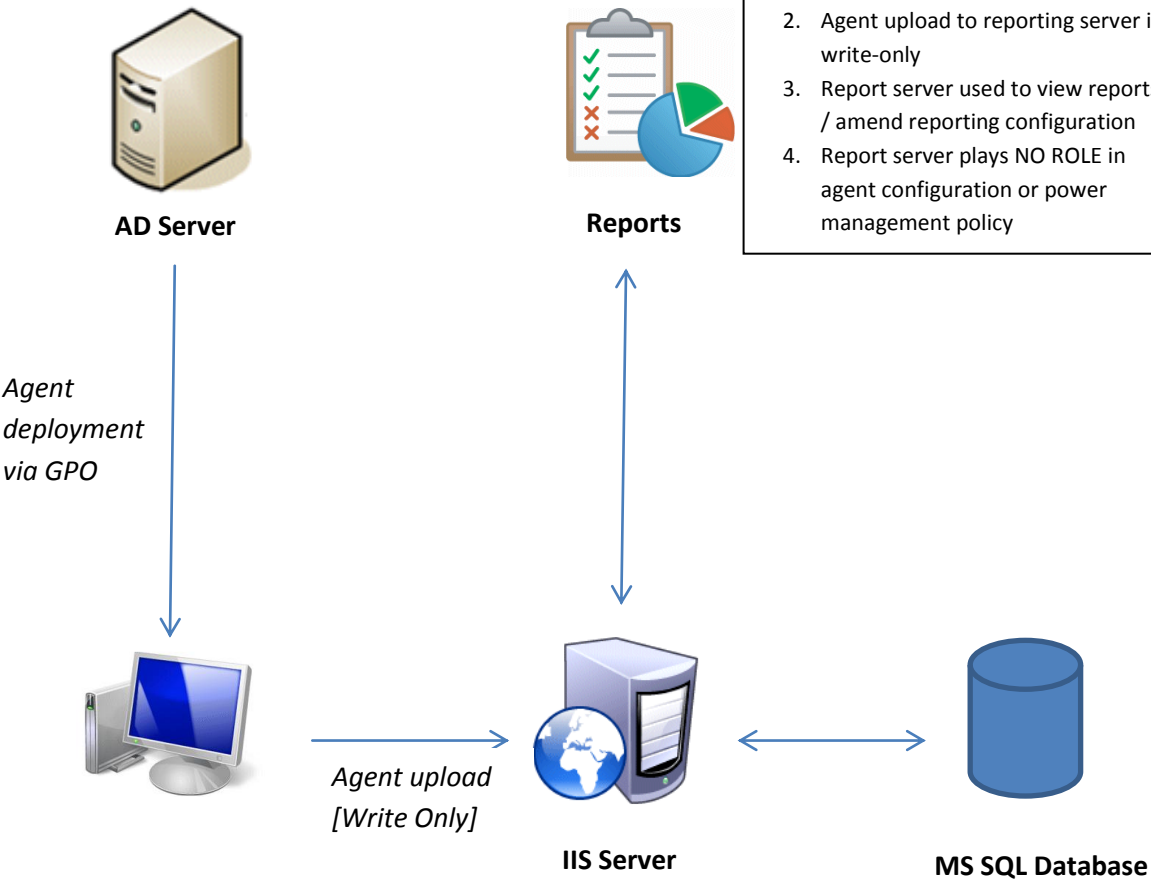
```
ALTER TABLE [dbo].[tblClientStatusDetail] WITH CHECK ADD CONSTRAINT
[FK_tblClientStatusDetail_tblClient] FOREIGN KEY([ClientId])
REFERENCES [dbo].[tblClient] ([ClientID])
```

```
ALTER TABLE [dbo].[tblClientStatusDetail] CHECK CONSTRAINT
[FK_tblClientStatusDetail_tblClient]
GO
```

**Tip:** This script can be run at any time but will take a considerable time to execute on an existing large database. It will only take a few seconds to execute on an empty database and is therefore best run prior to production deployment.

Appendix D: PowerMAN System Architecture

PowerMAN Agent & Server Architecture



## Appendix E: External user authentication API

PowerMAN Enterprise Server v5.2.5 introduced an external user authentication API. This may be used to integrate existing intranet systems with the PowerMAN reporting system. The authentication API is available on the hosted (cloud) based system provided by Data Synergy and selected solution resellers. **This feature is not available on private PMES installations running in Windows integrated authentication mode.**

The authentication API is exposed as two simple web services:

| Method       | Explanation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Query String | <p>A username and password may be passed to the API by using the Username and Password parameters in the query string. For instance the following HTTP GET request:</p> <p>e.g. <a href="http://yourserver/loginapi.aspx?Username=fred&amp;Password=12345">http://yourserver/loginapi.aspx?Username=fred&amp;Password=12345</a></p> <p>This is less secure than HTTP POST but may be acceptable for internal intranet solutions. This approach is not recommended for the (hosted) PMES system over the public internet.</p> |
| HTTP POST    | <p>A username and password may be passed to the API by POSTing the data to the target page. This approach is more secure than the simpler query string approach as the login data is not visible to the user. For instance the following HTTP POST request:</p> <p>e.g. <a href="http://yourserver/loginapi.aspx">http://yourserver/loginapi.aspx</a><br/>Content: Username=fred&amp;Password=12345</p>                                                                                                                      |

### Authentication API Output

The API is implemented as a simple web service.

- On success, it return **OK**: followed by a URL to redirect the user to (in the current session):

OK:/SiteSummary.aspx?SiteGUID=e4f3d29b0b444293b58aa4d9d245efff

- On failure, it returns **ERR**: followed by a brief explanation:

ERR:Unsuccessful logon

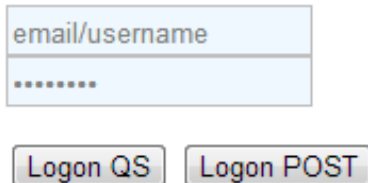
## Testing Authentication API

A test page is provided to test queries to the login API. To access the page visit:

<http://yourserver/logintest.aspx>

To use the test page proceed as follows:

1. Open the logintest.aspx page
2. Enter appropriate username and password details
3. Click the QS button to simulate logon via the query string method
4. Click the POST button to simulate logon via the POST method
5. The page displays the API result

A screenshot of a web form for testing authentication. It consists of two stacked text input fields. The top field contains the placeholder text 'email/username'. The bottom field contains a series of dots, representing a password. Below these fields are two buttons: 'Logon QS' and 'Logon POST', both with a light blue gradient and a thin border.