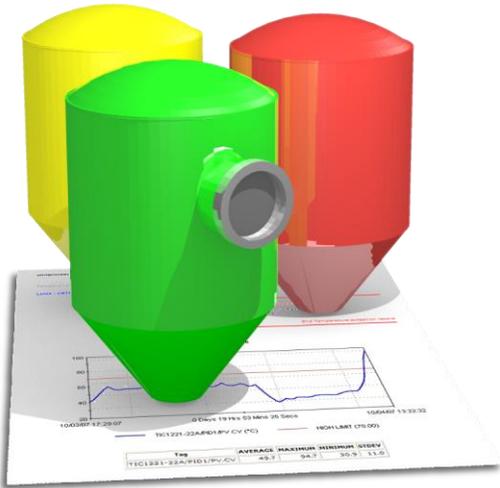


INFOBATCH™

InfoBatch for DeltaV Installation Guide

11811-0243-1



REVISION HISTORY

Revision	Date	Comments
0	02-NOV-2018	Initial version.
1	03-DEC-2019	Updated for author 32-character limit

Introduction

This publication describes the preparation and setup steps for installing InfoBatch in conjunction with Emerson Process Management DeltaV. This manual is intended for administrators who install and configure the InfoBatch environment.

This manual does not cover basic report configuration and access tasks. Consult the Related Documents section of this manual for additional resources.

Related Documents

Informetric InfoBatch Server Prerequisites 11403-0220-x

Getting Started with InfoBatch 10209-0215-x

InfoBatch Navigator Users Manual 10108-0219-x

InfoBatch Configurator Users Manual 10209-0215-x

InfoBatch Administrator's Reference Manual 10305-0215-x

InfoBatch DeltaV Connector Reference Manual 10305-0216-x

1 PREREQUISITES

Ensure that prerequisites are installed as specified in Informetric InfoBatch Server Prerequisites 11403-0220-x.

NOTE

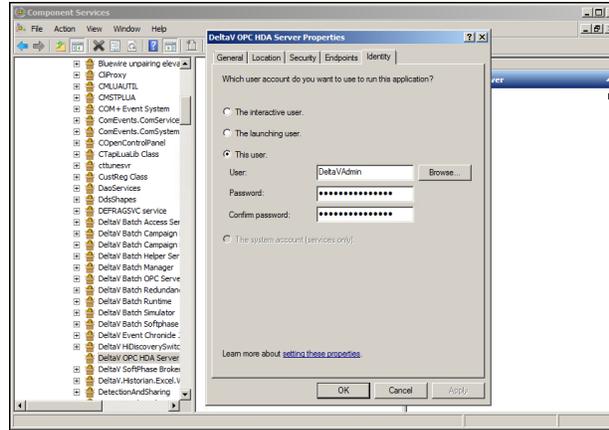
Avoid underscores ('_') in the InfoBatch Server name, as this will affect Internet Explorer access.

1.1 Firewall Configuration

If the DeltaV Batch Historian is located on a different database server than the InfoBatch Server, make sure that the Windows Firewall is configured to enable access. Likewise, firewall settings must enable access to continuous historians.

1.2 Continuous Historian

If the Continuous Historian is installed on a different server, DCOM settings must be configured on the remote server and the InfoBatch server to permit access. It is advisable to specify the DCOM identity for the DeltaV OPC HDA Server to a common account with appropriate access privileges on the historian server as well as the InfoBatch server. DCOM Security Access and Launch Privileges (local and remote), and Location properties should also be specified.



DeltaV OPC HDA Server DCOM Identity

1.3 Advanced Continuous Historian

If InfoBatch is being installed with the DeltaV Advanced Continuous Historian, make sure that the PI API (piapi32.dll) is installed on the InfoBatch Server prior to installing InfoBatch.

After running the InfoBatch installation kit make sure that the InfoBatchPISvr.IBPI and InfoBatchPISvrEx.IBPIEx components appear through Windows Component Services (dcomcnfg). The components can be registered manually by launching a command prompt, changing the current directory to ..\InfoBatch\Exe\, and executing InfoBatchPISvr /regserver and InfoBatchPISvrEx /regserver commands.

Using PI tools, create a PI user that will be entered when setting up the InfoBatch PI Connection. This user will be entered when adding the PI data source connection through the InfoBatch Configurator.

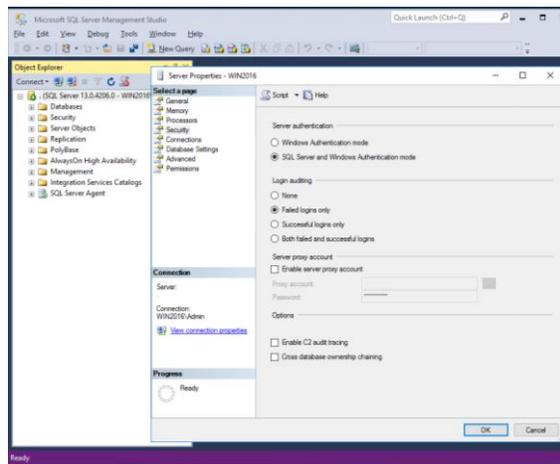
2 INFOBATCH AUTHENTICATION MODES

InfoBatch supports two authentication modes: SQL and Windows. SQL authentication utilizes users defined in the SQL database instance on which the InfoBatch database is deployed. Windows authentication utilizes Windows users account to manage application and database access.

The authentication mode affects both the InfoBatch modules' connections to the InfoBatch database and connections to external databases.

SQL server authentication is generally more straightforward to configure than Windows authentication. By default, InfoBatch is configured for SQL authentication after installation. The steps to specify Windows are described later in this document.

To configure the database server for mixed-mode authentication (Windows and SQL) login to Microsoft SQL Server Management Studio, right-click on the server instance, and select Properties. Select SQL Server and Windows Authentication mode on the Security page.

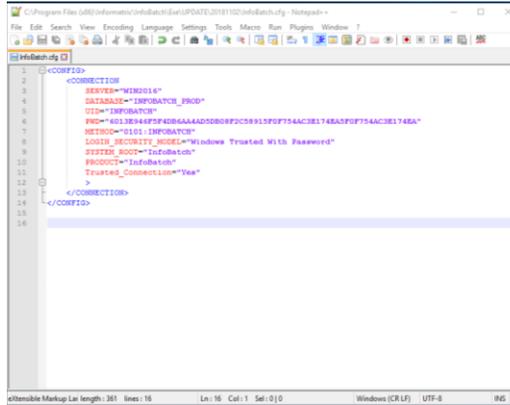


Enabling SQL Authentication

3 CONFIGURING INFOBATCH FOR WINDOWS AUTHENTICATION

In the case where SQL authentication is not available, the InfoBatch server as well as connections to external databases can be configured for Windows authentication.

To configure the InfoBatch Configurator and InfoBatch Navigator authentication mode, edit ..\InfoBatch\Exe\InfoBatch.cfg. Set LOGIN_SECURITY_MODEL="Windows Trusted With Password" and Trusted_Connection="Yes".



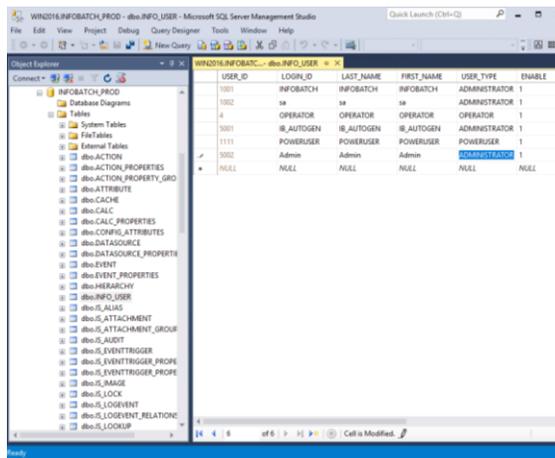
Windows Authentication in InfoBatch.cfg

Launch the InfoBatch Configurator to create an InfoBatch user associated with the Windows user. The following error will be displayed:



Configurator Privilege Error

Login to SQL Server Management Studio, right-click on the InfoBatch Database INFO_USER table and select Edit. Locate the Windows user and change the USER_TYPE to ADMINSTRATOR.



Assign ADMINISTRATOR privileges to Windows User

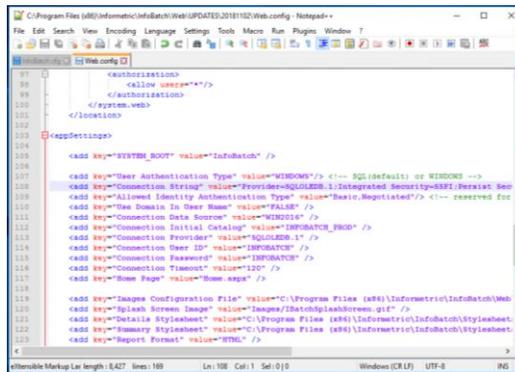
Windows domains and accounts may be longer than 32 characters. Therefore the IS_MSLOG table should be updated to increase the size of the AUTHOR column. Execute the following command against the INFOBATCH_PROD database:

```
ALTER TABLE IS_MSGLOG ALTER COLUMN AUTHOR VARCHAR(64)
```

To update the InfoBatch Web Server to run under Windows Authentication, edit the ..\InfoBatch\Web\Web.config file as follows:

```
<add key="User Authentication Type" value="WINDOWS"/>

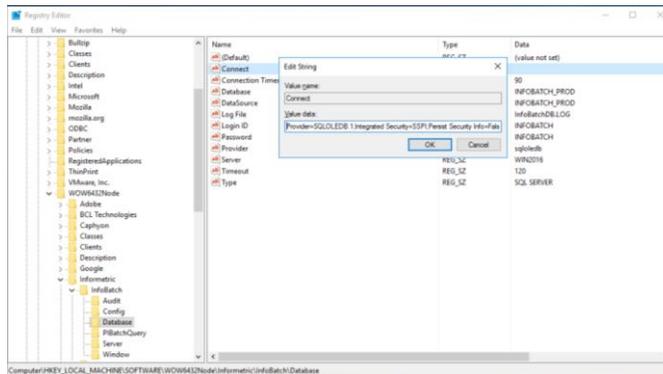
<add key="Connection String" value="
Provider=SQLOLEDB.1;Integrated Security=SSPI;Persist
Security Info=False; Data Source=YOUR SERVER NAME;Initial
Catalog=INFOBATCH_PROD"/>
```



Web.config Windows Authentication

Once InfoBatch.cfg has been updated to specify Windows authentication, the InfoBatch database connection string must be updated in the Windows registry.

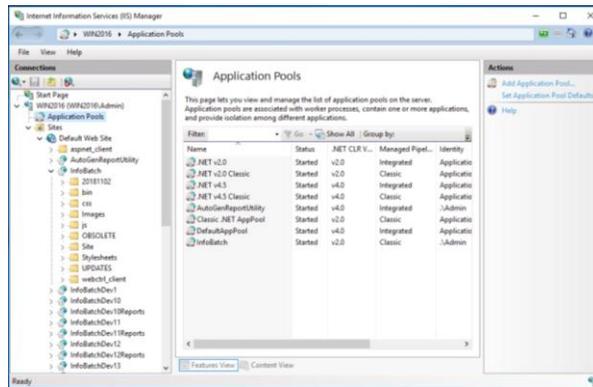
```
Provider=SQLOLEDB.1;Integrated Security=SSPI;Persist
Security Info=False; Data Source=YOUR SERVER NAME;Initial
Catalog=INFOBATCH_PROD
```



Registry InfoBatch Database Connection for Windows Authentication

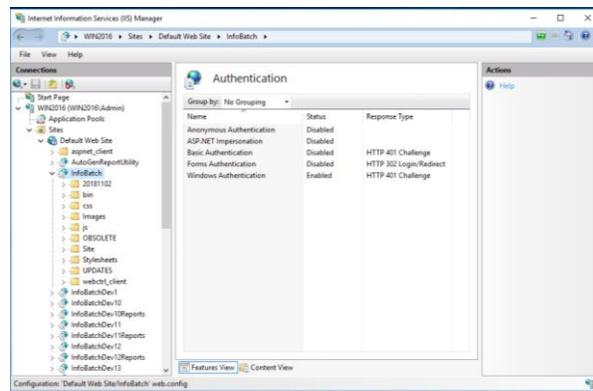
In the Microsoft Internet Information Services (IIS) Administrator, change the InfoBatch Application Pool to .NET 2.0.

Set the InfoBatch Application Pool identity to a specific Windows account with admin privileges and access permissions for the DeltaV Continuous Historian (e.g. DeltaVAdmin).



InfoBatch Application Pool Settings for Windows Authentication

Disable Anonymous Authentication for all InfoBatch virtual directories.



IIS InfoBatch Virtual Directory Authentication