Installing Principia on a Network

MORNINGSTAR

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Overview

These instructions apply to subscribers with a valid network subscription. This manual covers the following topics:

- Network system requirements
- Installing Principia on a server
- Installing Principia on a client workstation

☞ Morningstar does not support the installation of Principia to Terminal or Citrix servers.

What is the process for installing Principia on a network?

The network installation is comprised of 2 parts:

1. The server installation, which installs Principia to a drive accessible to all users.
2. The client installation, which places fonts, icons, shared files, and registry entries on each user's workstation.

What do I need before starting the installation?

Before beginning, you must:

- know the number of users who will use the network version of Principia, and
- create a shared folder on the server, and set security.

For a network subscription, the "number of users" refers to the number user licenses purchased and authorized by Morningstar. Please refer to the Principia license agreement for information regarding the maximum number of users that may access Principia under your subscription.

If the network administrator does not have the license files, please contact Morningstar Technical Support at (312) 424-4299.

How is the number of users for a network installation determined?

The network license agreement determines the number of installations allowed. If your office receives multiple Principia network modules under more than one name, please contact Morningstar to arrange a consolidation of the subscriptions.

For additional network subscription information, please call Morningstar's Product Sales department at (800) 886-1559.

Understanding the Network System Requirements

This section explains the following topics:

Overview

- what the network system requirements are for installing Principia on a network,
- the dangers of using a one-time disk on a workstation with a network version of Principia, and
- the dangers of sharing client files on the server.

Note the following general rules about installing Principia on a server:

- The server installation must be complete before running the client installations.
- The server installation must be completed with each update received.
- Hard disk space requirements could change over time.
- Upon updating Principia on the server, it's not necessary to rerun client installation.
- While performing updates for Principia, all network users must be out of the application.

☞ Please read all on-screen installation instructions carefully.

The server requirements for Principia are:

What are the server requirements for installing Principia on a network?

- Windows 2000 Server, or later
- Minimum RAM: 128 MB
- CD-ROM drive speed: minimum 4x
- 100-1500 MB free hard disk space (varies by module), and
- if using the Principia Suite, an additional 4.75 GB.

Do not install a one-time or single-user disk to the same machine housing any other Principia subscriptions, including client machines and servers. It is possible that software components installed on the new disk will conflict with the one-time disk or single-user components. It is recommend to install one-time disks to a separate computer.

What are the dangers of installing a one-time disk on a workstation with a network version of Principia?

Do not share client files in a single directory on the server. If multiple users access or modify the same client files simultaneously, this can lead to file corruption and the possible loss of client information. If users need to pass information to one another, copy and paste the desired client file from one user's directory to another, overwriting any existent file.

Why can directly sharing client files on the server cause problems?

Please feel free to Email Morningstar Technical Support at tech@morningstar.com, or call (312) 424-4299.

Have questions?

Installing Principia on a Server

This section explains how to install Principia on a server. You will learn the following:

Overview

- what rights users need to access Principia on a network, and
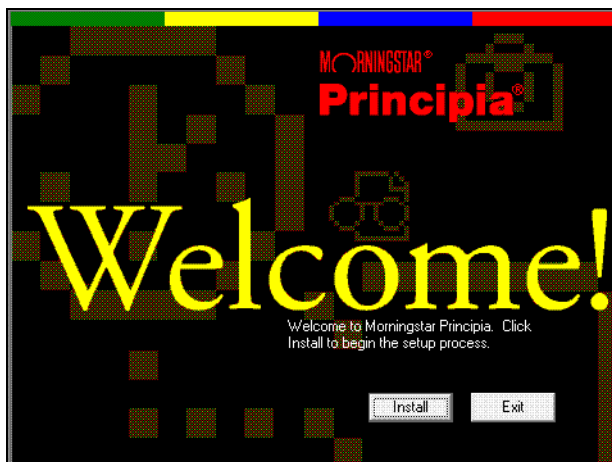- how to install Principia on a server.

Note the following about this process:

- The server installation must be completed before any client installations are run.
- The network administrator (or a user who has full administrative rights to the server) must complete this installation.
- The installation must be run from a computer with access to the server.

The network rights of Principia users may be restricted to **Read** and **File Scan only** for all subdirectories of Principia. If users' saved files default to the network directory, users must have full rights to the \USERS\<USERID> subdirectory as well. The <USERID> is the userid entered when running the client installation.

What rights should be set for users who access Principia on a network?

To install Principia on a network, do the following from a computer that has access to the server:

How do I install Principia on a server?

1. Exit any open applications, including antivirus applications, online services, and all local users of Principia.
2. Insert the CD-ROM or DVD into the drive. A Welcome box appears.
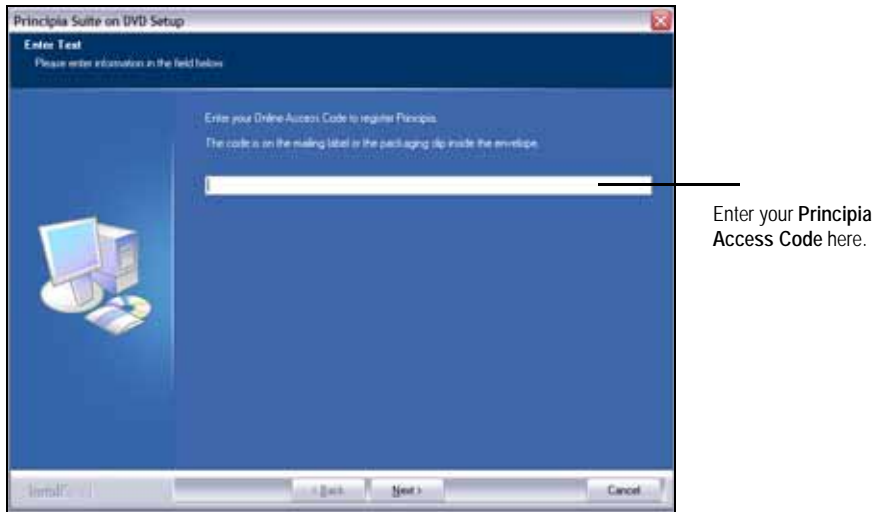

3. Click **Install** to begin.

   ☞ If the Welcome step does not appear automatically, you may run the install program manually. From the Start menu, click **Run**. Type **D:\setup.exe** (where D is the drive letter for the CD-ROM drive.)

4. On the step shown below, enter your **Principia Access Code**, then click **Next**.
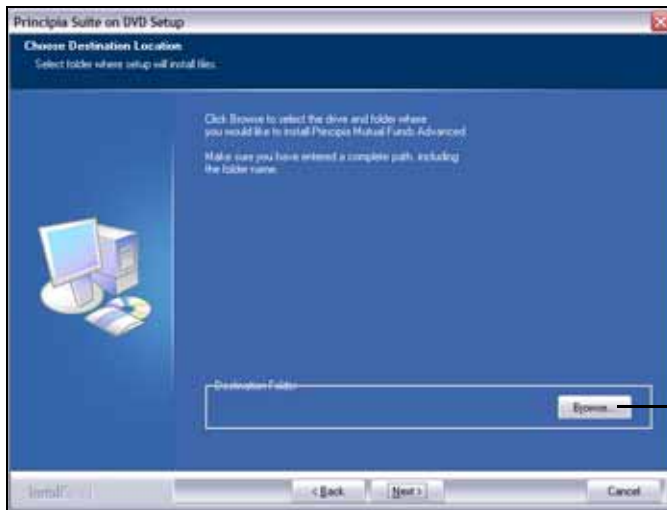

Enter your **Principia Access Code** here.

☞ The Principia Access Code can be found on the packing slip sent to you along with the Principia disks.

5. The Welcome to the Install Shield Wizard dialog appears. Click **Next**.
6. The License Agreement step appears. Read the agreement, and click **Yes** if you accept the terms.
7. To begin the network installation, select **Multiple-User Installation**. Click **Next**.
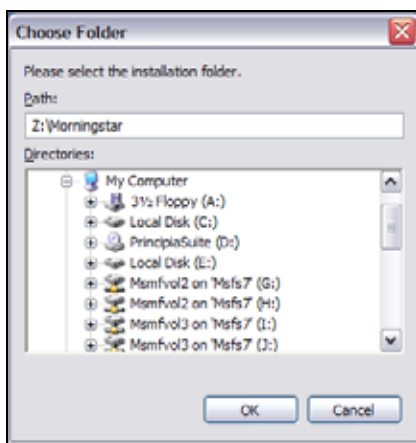

Select this option.

8. The Choose Destination Location step appears. Click **Browse**.

Click this button
to find and select
the installation folder.

9. The Choose Folder dialog box appears. Select the installation **folder**. (Make a note of this
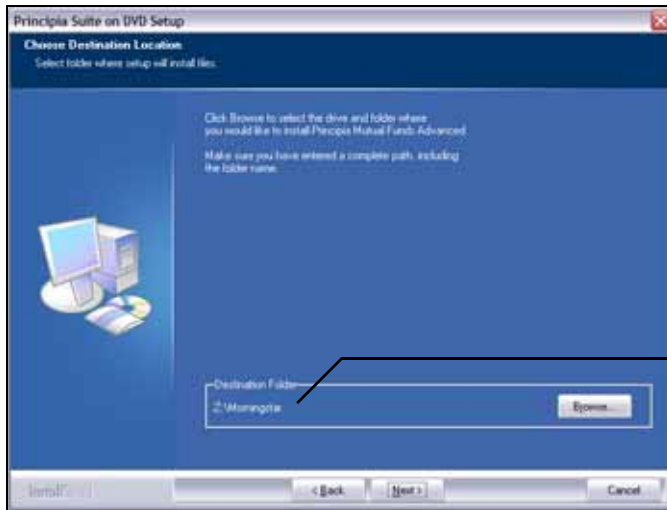   path, as you will need it again.)

Choose the correct folder
where the network version
of Principia will be installed.

☞ Please install all network Principia modules to the same folder on your server. This allows
    users to gain access to all databases in Research Mode, as well as combine asset types in
    Portfolio Mode to create multi-asset portfolios.

10. Click **OK** to return to the Choose Destination Location dialog.

11. The destination directory should appear in the Choose Destination Location dialog, click
    Next.

Confirm that this is
the correct folder before
clicking **Next** to proceed.

12. You are now be prompted to insert the Network License disk. The Morningstar Network
    License files were sent when you subscribed to the network version of Principia. Click
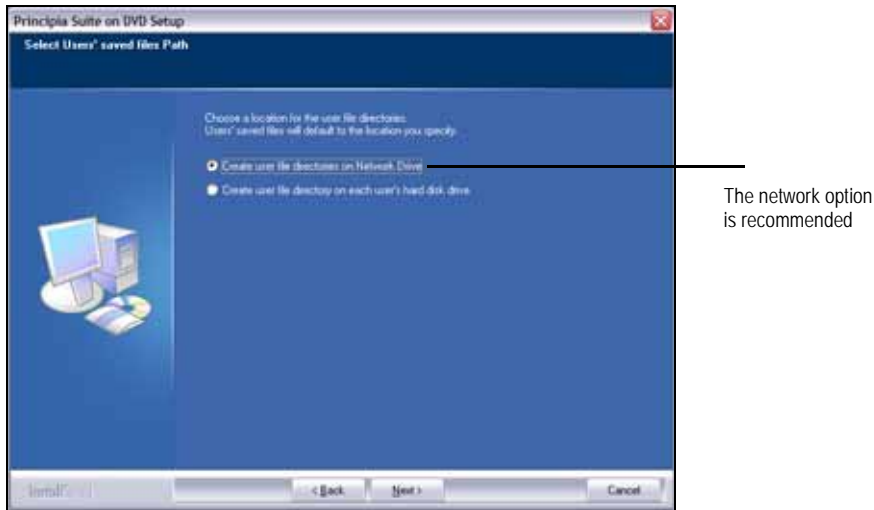   **Browse,** then navigate and select the license file.

Click **Browse** to find
the Network License files
you previously saved.
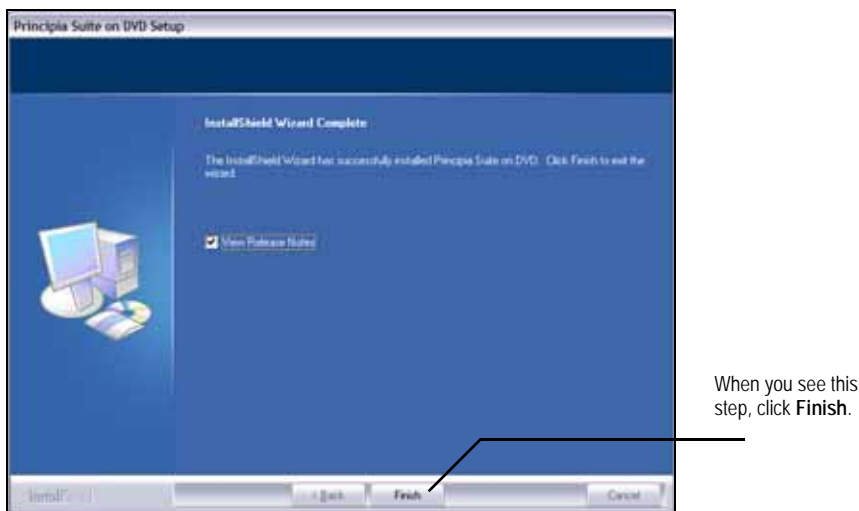
13. Click **OK**.

    ☞ If you did not receive the Network License files, please contact Morningstar Technical
       Support at (312) 424-4299.

14. You are asked to specify whether users' saved files should default to a location on the
    server, or to a directory on each individual's local hard drive.
    • If you select the Network drive, you are prompted to accept the default location of the
      Principia program directory. This default location is recommended. Click **Browse** to
      choose an alternate network destination for user files. You may choose any location for
      the files, but they must be able to read, write, modify, create, and delete files.
    • If you select user's hard disk drive, the user file directory will be created on each user's
      local machine during the client installation.

15. Click **Next** to continue the installation.

The network option
is recommended

16. When all files have been successfully installed, the Installation Complete step appears.
    Click **Finish**.

When you see this
step, click **Finish**.

17. View the Release Notes; they contain useful news and information about Morningstar's
    software. Users, as well as administrators, should be aware of the contents.

Installing Principia on a Client Workstation

This section covers the installation of Principia on a client workstation that will access the network installation. You will learn the following:

Overview

- how DLL and OCX files are handled on the client machine
- where the registry entries are stored on the client machine, and
- the steps involved in loading Principia on a client machine.

☞ For each workstation, before beginning the installation, ensure a network drive is mapped to the shared Principia folder on the server.

Note the following about the client installation process:

- The network administrator (or a user with rights to install software to the client workstation) may run the client installation.
- The client installation must be run from each workstation that will access Principia.
- Most of the instructions for configuring the client workstations are defaults taken directly from information stored during the server installation.
- To simplify the client installation, most users will find that they can accept all of the defaults.
- The workstation operating system must be Windows XP or later.

The Principia client installation process places .DLL and .OCX files in the workstation's WINDOWS\SYSTEM32 directory. In the event a more current version of these files already exists on the workstation when the client installation is run, Principia will not overwrite the file.

How are shared DLL and OCX files handled?

A list of .DLL and .OCX file versions currently shipped with Principia is available from Morningstar's Technical Support department (312)424-4299.

On 32-bit systems, the Principia client installation creates a group of registry entries under HKEY_LOCAL_MACHINE\SOFTWARE\MORNINGSTAR and HKEY_CURRENT_USER\SOFTWARE\MORNINGSTAR. These entries contain information essential to Principia's operation.

Where are the registry entries created on 32-bit systems?

On 64-bit systems, the Principia client installation creates a group of entries under HKEY_LOCAL_MACHINE\SOFTWARE\WoW6432Node\Morningstar
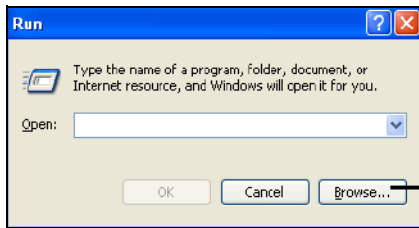
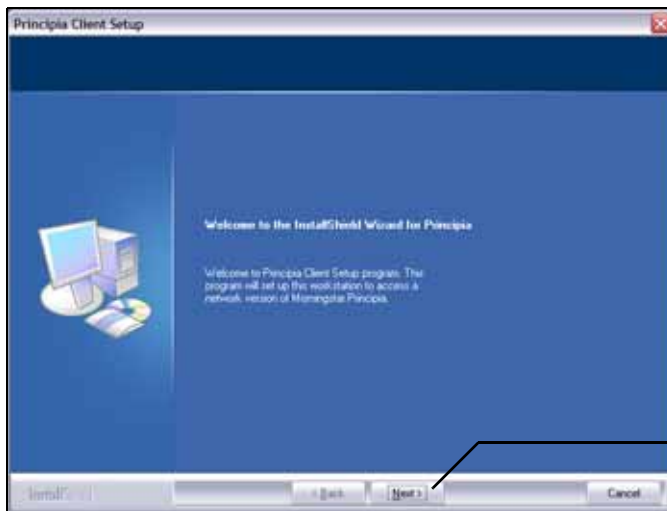**Where are the registry entries created on 64-bit systems?**

To install Principia on a client workstation, do the following:

1. From the Windows taskbar on the user's workstation, click **Start**…**Run**.
2. Click **Browse** to select the Principia program directory on the server.

Click **Browse** to find the
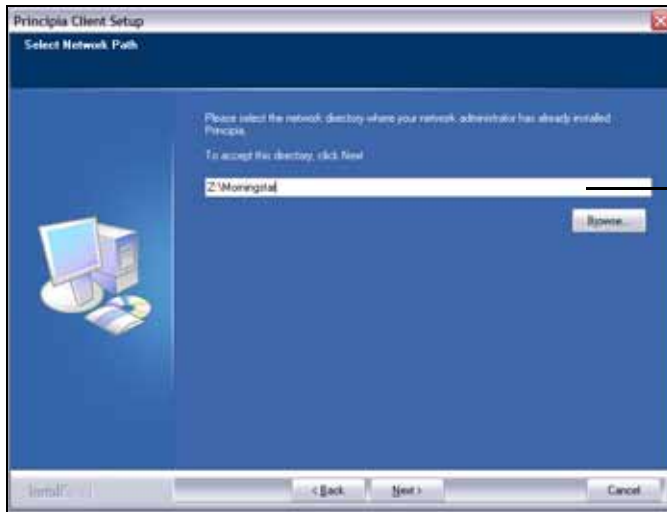Principia installation
file on the network.

3. Find the **setup.exe** file in the \CLIENT subdirectory.
4. Click **OK**.
5. The Welcome to the Install Shield Wizard for Principia window appears. Click **Next**.

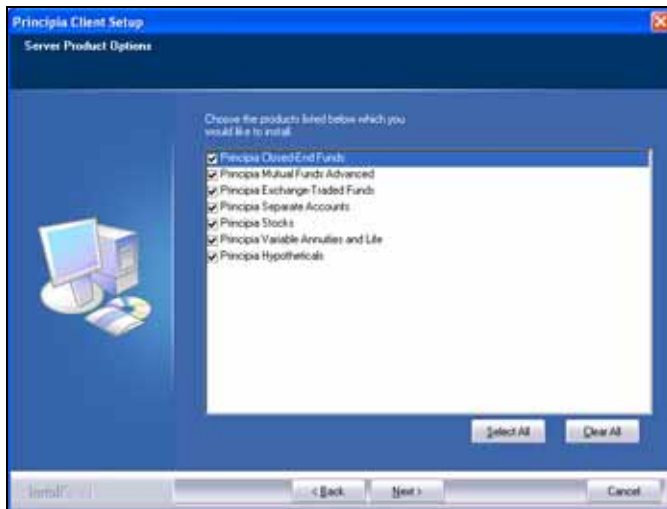When this step
appears, click **Next**.

6. The License Agreement step appears. If you accept the terms, click **Yes**.
7. In the Select Network Path step, confirm the directory, then click **Next**.

If this is not the correct path, click **Browse** to navigate to the correct folder.

8. On the Server Product Options step, confirm the Principia **modules** the user should be able to access.

    ☞ Some network subscriptions have different numbers of subscribers to different modules. For example, a network subscription might have five subscribers to Principia for Mutual Funds Advanced and only two subscribers to Principia for Variable Annuities. You must have the correct boxes checked for the module(s) this user will access.

Uncheck any boxes for modules the user in question should not have access to.

9. Click **Next**. The Enter Text step appears.

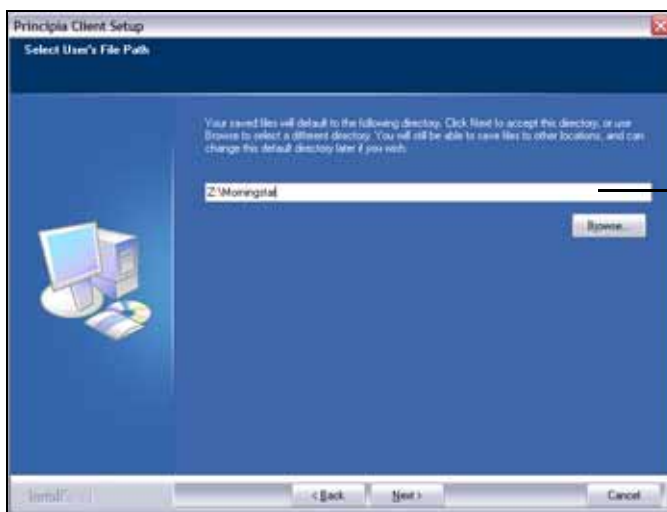10. Enter a **User ID** (limited to eight characters, with no spaces or punctuation).

☞ The User ID must be unique for each Principia user in the network subscription.

Enter a
User ID here.

11. Click **Next**. The Select User's File Path step appears.
12. If the network administrator set the default location for users' saved files to a network location, a path to a location on your network will appear. Click **Next**.
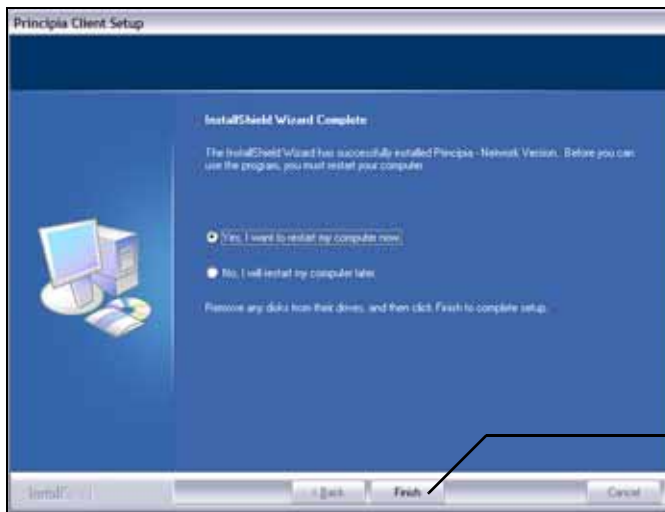
☞ If the network administrator chose to have files saved to the workstation hard drive, you will be asked to confirm a default directory for saved user files: C:\ Program Files\ Morningstar\ Principia. Accept this location.

Confirm that this is
the correct location
where the user's files
should be saved.

13. The Install Shield Wizard Complete step appears. Select whether to **restart now**, or **restart later**.

14. Click **Finish** to complete the client installation.

Click Finish to
complete the setup.