



KEPServerEX[®] V6 Install Guide

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• *Kepware provides a [Secure Deployment Guide](#) for information about best security practices related to a KEPServerEX installation on the Kepware website.*

Kepware is a software development business of PTC Inc. located in Portland, Maine. Kepware provides a portfolio of software solutions to help businesses connect diverse automation devices and software applications and enable the Industrial Internet of Things. From plant floor to wellsite to windfarm, Kepware serves a wide range of customers in a variety of vertical markets including Manufacturing, Oil & Gas, Building Automation, Power & Utilities, and more. Established in 1995 and now distributed in more than 100 countries, Kepware’s software solutions help thousands of businesses improve operations and decision making.

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This document is a guide for installing and licensing KEPServerEX V6. There are three different installation scenarios based on the machine history.

1. Installing KEPServerEX V6 on a Clean Machine

This scenario is applicable for users who do not have KEPServerEX V5 installed and want to install KEPServerEX V6.

- 1 Launch the KEPServerEX install wizard.
- 2 Select the preferred language.
 - *Please refer to the Kepware Knowledge Base for a list of localized drivers.*
- 3 Read the license agreement and accept the terms to continue.
- 4 In Destination Folder, accept or change the installation directory.

By default, it is installed in: C:\Program Files\Kepware\KEPServerEX 6\.
- 5 In Application Data Folder, accept or change the directory.

The Application Data folder contains project backup and supporting files. It must be accessible to authorized users and any user-specified path must be local to the PC.
By default, it is installed in: C:\ProgramData\Kepware\KEPServerEX 6\.
- 6 Select whether to create a shortcut on the desktop.

Without a shortcut, the Configuration is only accessible through the Start Menu and the server's Administration Menu.
- 7 Optional: Select a vertical suite to pre-select associated drivers and advanced plug-ins for installation.

Select Typical to install all drivers and advanced plug-ins. Select Custom to specify the drivers and advanced plug-ins to install.
- 8 Select the drivers, advanced plug-ins, or interfaces to install.

When a main component is selected, all of its sub-components are also installed. To view and select specific components, expand the appropriate tree (Communication Drivers, Native Client Interfaces, and Plug-ins).
- 9 Verify that external dependencies are met before you proceed with the installation or attempt to use the features during Runtime.

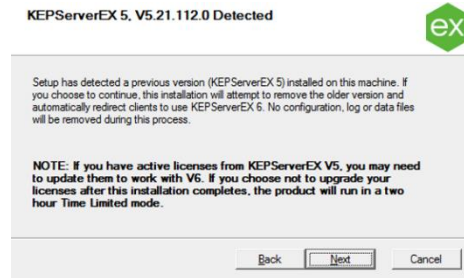
The install wizard can detect when selected features have external dependencies.
• *For more information, refer to the individual feature's help file.*
- 10 Specify whether to enable Dynamic Tag addressing by default and whether to allow anonymous login for UA client sessions.

These settings may be changed later, but have security implications, so use caution.
- 11 Set a unique strong password for the Administrator account (strongly suggested) or choose to skip setting a password at this time.
 - The Administrator user account password cannot be reset, but additional users can be added to the Administrator user group. Best practices suggest each user with administrative access be assigned unique accounts and passwords to ensure audit integrity and continual access through staff changes.
- 12 Finish the installation.
- 13 Configure Windows permissions for the Application Data Folder.
 - *For more information, see the Application Data Folder section of the server help.*

2. Upgrading from Version 5 to Version 6

This scenario is applicable for users running an unlicensed version of KEPServerEX V5 and want to upgrade to KEPServerEX V6.

- 1 Launch the KEPServerEX install wizard.
- 2 Select the preferred language.
 - Please refer to the Kepware Knowledge Base for a list of localized drivers.
- 3 Read the license agreement and accept the terms to continue.
- 4 The Install wizard can detect when a previous version of the server is installed. If you continue with the installation, the legacy server will be removed, and all clients automatically directed to the new server. If you choose to continue, the product will run in time-limited mode (two-hour increments).
- 5 In Destination Folder, accept or change the installation directory. By default, it will be installed in: C:\Program Files\Kepware\KEPServerEX 6\.
- 6 In Application Data Folder, accept or change the installation directory. The Application Data folder must be accessible to all users, and any user-specified path must be local to the PC. By default, it will be installed in: C:\ProgramData\.
- 7 Select whether to create a shortcut on the desktop. Without a shortcut, the Configuration is only accessible through the Start Menu and the server's Administration Menu.
- 8 Select drivers, advanced plug-ins, or interfaces to install. When a main component is selected, all of its sub-components are also installed. To view and select specific components, expand the appropriate tree (Communication Drivers, Native Client Interfaces, and Plug-ins).
- 9 Verify that external dependencies are met before you proceed with the installation or attempt to use the features during Runtime. The install wizard can detect when selected features have external dependencies.
 - For more information, refer to the individual feature's help file.
- 10 Specify whether to enable Dynamic Tag addressing by default and whether to allow anonymous login for UA Client Sessions. These settings may be changed later, but have security implications, so use caution.
- 11 Set a unique strong password for the Administrator account (strongly suggested) or choose to skip setting a password at this time.
 - The Administrator user account password cannot be reset, but additional users can be added to the Administrator user group. Best practices suggest each user with administrative access be assigned unique accounts and passwords to ensure audit integrity and continual access through staff changes.
- 12 Finish the installation.
- 13 Configure Windows permissions for the Application Data Folder.
 - For more information, see the Application Data Folder section of the server help.



3. Installing Version 6 on a Machine with Licenses

This scenario is applicable to users that have previously installed and licensed KEPServerEX Version 5 and may or may not have an active Support & Maintenance Agreement.

- 1 Launch the KEPServerEX V6 install wizard.
- 2 Select the preferred language.
 - Please refer to the Kepware Knowledge Base for a list of localized drivers.
- 3 Read the License Warning. If you have a valid KEPServerEX Version 5 license, but do not have an active Support & Maintenance Agreement, contact Kepware's Support Sales team to renew your subscription before continuing with the installation. You can cancel the install to renew your subscription or continue using the KEPServerEX Version 5 product. If you choose to continue, the product will run in time-limited mode (two-hour increments).
- 4 Read the license agreement and accept the terms to continue.
- 5 The Install wizard can detect when a previous version of the server is installed. If you continue with the installation, the legacy server will be removed and all clients automatically directed to the new server. If you choose to continue, the product will run in time-limited mode (two-hour increments).
- 6 In Destination Folder, accept or change the installation directory. By default, it will be installed in: C:\Program Files\Kepware\KEPServerEX 6\
 - **Note:** No configuration, log, or data files will be removed during this process.
- 7 In Application Data Folder, accept or change the installation directory.

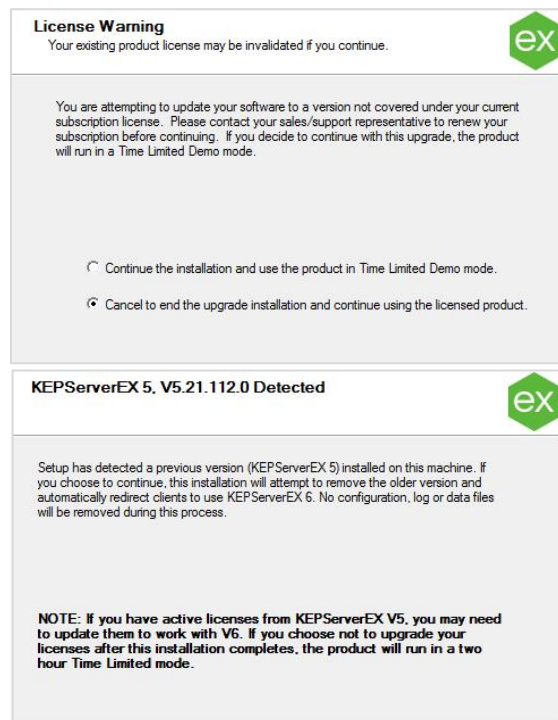
The Application Data folder must be accessible to authorized users, and any user-specified path must be local to the PC. By default, it will be installed in: C:\ProgramData\.
- 8 Select whether to create a shortcut on the desktop.

Without a shortcut, the Configuration will only be accessible through the Start Menu and the server's Administration Menu.
- 9 Select the drivers, advanced plug-ins, or interfaces to be installed.

When a main component is selected, all of its sub-components are also installed. To view and select specific components, expand the appropriate tree (Communication Drivers, Native Client Interfaces, and Plug-ins).
- 10 Verify that external dependencies are met before you proceed with the installation or attempt to use the features during Runtime.

The install wizard can detect when selected features have external dependencies.

 - For more information, refer to the individual feature's help file.



- 11 Specify whether or not to enable dynamic tag addressing and whether to allow anonymous login for UA client sessions.

These settings may be changed later, but have security implications, so use caution.

Set a unique strong password for the Administrator account (strongly suggested) or choose to skip setting a password at this time.

- The Administrator user account password cannot be reset, but additional users can be added to the Administrator user group. Best practices suggest each user with administrative access be assigned unique accounts and passwords to ensure audit integrity and continual access through staff changes.

- 12 Configure Windows permissions for the Application Data Folder.

For more information, see the *Application Data Folder* section of the server help.

- 13 Upgrade the license.

The KEPServerEX Version 6 install will automatically launch a “Licensing KEPServerEX Version 6” document containing information on upgrading Version 5 license to Version 6. The product will run in time-limited mode (two-hour increments) until upgraded.

- **Note:** A feature must be installed before a license for it can be activated

- *Keeware provides a [Secure Deployment Guide](#) for information about best security practices related to a KEPServerEX installation on the Keeware website.*

4. Licensing in Virtualized Environments

To ensure license bindings do not unexpectedly get broken when using Keeware products in virtualized environments, please review the following materials

- Best practices guide

<https://www.keeware.com/en-us/support/knowledge-base/2018/can-i-license-kepserverex-on-a-virtual-machine-cl/>

- Knowledge Article

<https://www.ptc.com/en/support/article/CS286615>

5. Licensing Resources

For detailed technical information and instructions on licensing KEPServerEX Version 6, please see the License Utility product manual. This can be accessed several ways:

- 1 Through the KEPServerEX Configuration

- Click **Help | Server Help**.
- In the left-hand pane, locate and double-click **License Utility**.

- 2 Through the License Utility

- Right-click the **KEPServerEX** icon located in the System Tray and select **License Utility**.
- Click **Help**.

3 Through the Administration Menu

- Right-click the **KEPServerEX** icon located in the System Tray and select **Help**.
- In the left-hand pane, locate and double-click **License Utility**.
- To access additional licensing resources, visit <https://www.kepware.com/support/licensing/>.

6. Changing the Language

You can change the language in KEPServerEX at any time following the install:

- 1 Right-click the KEPServerEX icon located in the System Tray and select **Settings**.
 - 2 Access the **Administration** tab and select a language from the **Product language selection** drop-down menu.
- **Note:** User-defined channel, device, and tag names are not translated in the event of a language change.

7. Technical Support

Have questions? Kepware's experienced Technical Support team provides high priority phone, email, and web support to customers with an active Support & Maintenance Agreement. Please have product information and Activation IDs available. Sign in through your My Kepware account for full access to Technical Support. Pre-sales support with Applications Engineers is also available upon request.