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Asset Management

FactoryTalk® AssetCentre



INSTALLATION GUIDE

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**Rockwell
Automation**

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Introduction

FactoryTalk® AssetCentre version 2.21 monitors your factory automation system and provides centralized tools to minimize downtime due to unauthorized actions or failing devices. It does this by:

- providing version control and archiving of program files and documents.
- providing a disaster recovery system that verifies your devices' program and configuration files against protected master files, ensuring quick and accurate recovery if a problem should occur.
- monitoring FactoryTalk-enabled software products and logging system events and user actions (recorded in the Event log and Audit log respectively).
- managing device configuration files.
- managing process device calibration, including scheduling and tracking (optional Calibration Management capability).

FactoryTalk AssetCentre uses FactoryTalk Services Platform to provide seamless connectivity with other FactoryTalk-enabled software. Users and computers are defined in FactoryTalk Directory; access to actions within the FactoryTalk AssetCentre system is controlled with FactoryTalk Security.

About the documentation set (or, Where do I start?)

The documentation set includes:

- **FactoryTalk AssetCentre Installation Guide** (Document ID FTAC-IN002B-EN-D). Use this manual to install the FactoryTalk AssetCentre system.
- **FactoryTalk AssetCentre Getting Results Guide** (Document ID FTAC-GR002A-EN-D) Use this manual to get started using the FactoryTalk AssetCentre system.
- **Online help.** Use the comprehensive online help for assistance while using the FactoryTalk AssetCentre system.

About this book

This book is written for FactoryTalk AssetCentre administrators and IT professionals. To perform many of the tasks described in this book, you will need to log onto the computers onto which you are installing software as an Administrator (or log on using an account that has administrative privileges).

We assume you are familiar with:

- Microsoft® Windows® operating systems including basic Windows networking and administration tasks
- Microsoft SQL Server
- RSLinx™ communication software
- Rockwell Software programming tools for programmable logic controllers
- control networks such as DeviceNet and programmable logic controllers such as PLC-5® processors

Please use the feedback form, which you will find packaged with your software, to report errors and to let us know what information you would like to see added in future editions of this manual.

The components of FactoryTalk AssetCentre

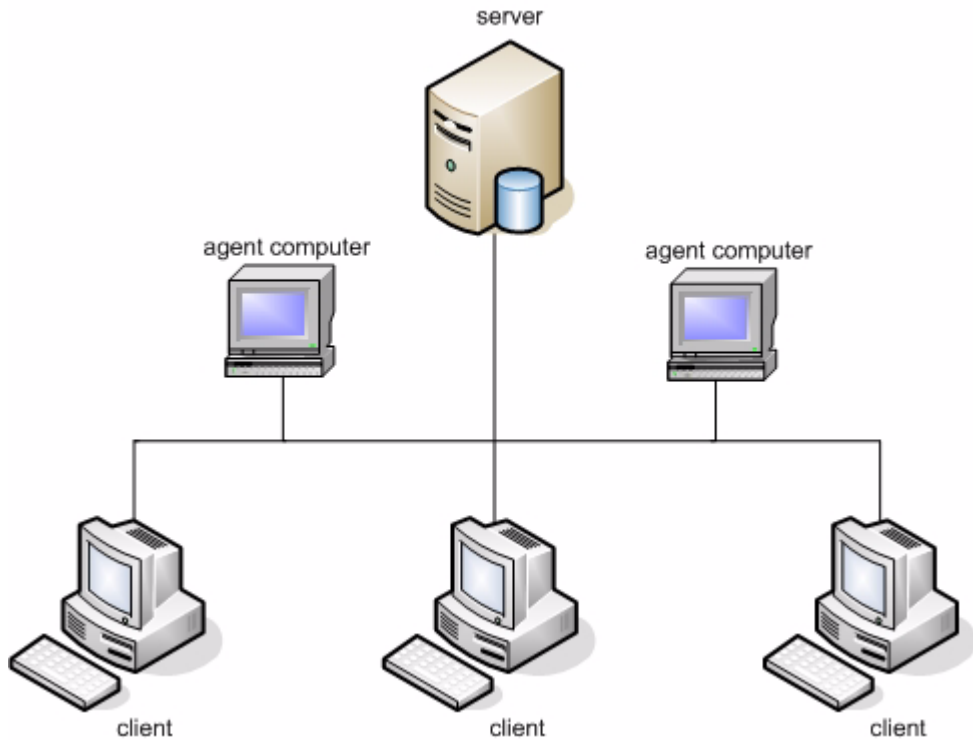
There are three primary components of a FactoryTalk AssetCentre system.

- **FactoryTalk AssetCentre server**, which controls the rest of the system and governs its operations. The server requires Microsoft SQL Server 2005 (SP1 or later) or Microsoft SQL Server 2000 (SP4 or later) to function. The SQL Server is typically on the same computer as the FactoryTalk AssetCentre server. The instructions in this manual are written for that case, although the SQL Server could be installed on a different computer.
- **FactoryTalk AssetCentre clients**, which permit users to configure and use the server, view logged events and perform other tasks associated with the software. The client can be installed on any computer that:
 - is capable of running the client software (see “Client and agent computer requirements” on page 4).
 - is connected to the FactoryTalk AssetCentre server.
- **FactoryTalk AssetCentre agents**, which are programs that perform certain scheduled operations, such as Disaster Recovery and searches. Agents run independently of the server and independently from each other—users schedule operations and the agents perform them at the scheduled time. By spreading the processing load over multiple computers, FactoryTalk AssetCentre agents speed up operations. When a server needs a scheduled operation to begin, it will try to locate an available computer running the appropriate agent to perform that task. When it locates an agent to perform the task, it assigns the task to that agent. When the agent has completed the task, the agent reports back to the server that the task is done.



Agents can be installed on any computer that:

- is capable of running the agent software (see “Client and agent computer requirements” on page 4).
- is connected to the FactoryTalk AssetCentre server.



When the system needs to run a schedule it searches the network for an available agent to perform that function.

System requirements

Server computer requirements

FactoryTalk AssetCentre server computers must meet the following minimum requirements. Note that FactoryTalk AssetCentre does not support 64-bit Windows operating systems. Only 32-bit versions of Windows operating systems are supported.

Hardware	Software
<ul style="list-style-type: none"> ■ PC with 1.8 GHz or higher processor clock speed recommended. Intel Pentium/Celeron family, or AMD K6/Athlon/Duron family, or compatible processor recommended ■ 512 MB of RAM (more, depending on application requirements) ■ 3 GB of free hard disk space (more, depending on application requirements) ■ Graphics adapter capable of a minimum resolution of 1024 x 768 pixels ■ Keyboard and pointing device (mouse) ■ Network adapter card 	<ul style="list-style-type: none"> ■ Windows XP Professional (with Service Pack 2 or higher) or Windows 2000 Professional (with Service Pack 4 or higher) or Windows 2000 Server (with Service Pack 4 or higher) or Windows Server 2003 Standard Edition (with Service Pack 1 or higher) ■ Microsoft Internet Explorer Web browser, version 6.0 or higher ■ Optional. RSLogix 5 or RSLogix 500 version 7.30 or higher, or RSLogix 5000 version 12 or higher, or any other version released as part of CPR 9.* ■ RSLinx Enterprise version 5.00.00 or higher if your system includes PanelView Plus operator interfaces** ■ FactoryTalk View ME for agents if your system includes PanelView Plus operator interfaces**

**To take advantage of security, the FactoryTalk AssetCentre client or agent should be installed on each computer running your RSLogix programming software.*

To take advantage of auditing, the FactoryTalk AssetCentre client should be installed on each computer running your RSLogix programming software.

For Disaster Recovery functions, the appropriate RSLogix programming software for your devices MUST be installed on the agent computer.

To edit the file and data settings for a compare operation for PLC-5, SLC 500, or MicroLogix processors, you must have RSLogix 5 or RSLogix 500 software installed on the client computer.

*** RSLinx Enterprise is included as part of the FactoryTalk AssetCentre install. FactoryTalk View ME is a separate installation, not included in FactoryTalk AssetCentre.*

Network requirements

Your Microsoft Windows network must use the TCP/IP protocol.

If you use a firewall, you must configure the firewall to permit traffic on the following ports:

This port:	is used for:
TCP port 25	SMTP mail
TCP port 80	Standard WWW port
TCP port 135	Remote Process Calls
TCP port 139	File and printer sharing
TCP port 445	File and printer sharing
TCP port 1433	Communications to SQL Server
TCP ports 7002 - 7004	FactoryTalk AssetCentre
UDP port 137	File and printer sharing
UDP port 138	File and printer sharing
UDP port 1434	Browsing for SQL Servers
UDP port 21060	Rockwell Automation Trace Diagnostics
UDP port 21061	Rockwell Automation Trace Diagnostics

Some of these ports may vary on your network. Work with your network administrators to determine the correct port numbers to open.

You may need to open ports for other Rockwell Automation products as well. See “Additional ports you may have to open” on page 77.

About the installation process

Installing FactoryTalk AssetCentre software is a multiple-part process.

1. Install the prerequisite software for the FactoryTalk AssetCentre server.
2. If you have purchased the Calibration Management capability, install the ProCalV5 server.
3. Install the FactoryTalk AssetCentre server.
4. Install FactoryTalk AssetCentre clients.
5. If you have purchased the Calibration Management capability, install the ProCalV5 clients.



6. Install FactoryTalk AssetCentre agents.

7. Configure users and security.

The following chapters guide you through these tasks.

2

Converting an RSMACC system

This chapter explains the process for upgrading your RSMACC™ Change Management system to FactoryTalk AssetCentre. If you want to upgrade an RSMACC Network Health or Enterprise Online Condition Monitor (EOL) system, contact your local Rockwell Automation office. You must have RSMACC version 1.05 or later to upgrade to FactoryTalk AssetCentre.



Do not attempt to run any RSMACC components along with any FactoryTalk AssetCentre components on the same computer. This may lead to unexpected results.

The conversion path outlined in this chapter makes the following assumptions:

- That you are installing FactoryTalk AssetCentre for the first time. (That you did not have a test system running first, or that your test system is completely isolated from your production system.)
- That you are using the same client computers that you had with RSMACC. You may also be adding more client computers to the system.
- That you are installing the SQL database on the same computer as the FactoryTalk AssetCentre server software. (They can be installed on separate computers.)

About migrating the databases

RSMACC uses three databases to store data:

- Event and Audit
- Archive (only with the RSMACC Change Management solution)
- Diagnostics and Health (only with the RSMACC Network Health solution)

FactoryTalk AssetCentre combines these databases into one unified database (called *AssetCentre*). A database migration tool is provided with the FactoryTalk AssetCentre server software to make migration as easy as possible. Because the equivalent of the RSMACC Network Health solution is not included in FactoryTalk AssetCentre version 2.21, Diagnostics and Health information will only be logged if RSNetWorx MD is installed on your system. Otherwise, only the information imported from RSMACC will appear in the AssetCentre database.

When the Archive database is imported into FactoryTalk AssetCentre, the creation timestamp for imported labels reflects the time the asset was created (rather than the time the label was added). For example if a file in the RSMACC system was created on

7/18/2006 1:47PM, all the imported labels will show a date and time of 7/18/2006 1:47PM even though the labels were created some time after that. The imported Archive history and Audit trail correctly reflect the historic label creation date.

Migrating from RSMACC Change Management to FactoryTalk AssetCentre

During the migration process you will uninstall RSMACC, backup the RSMACC SQL databases, install FactoryTalk AssetCentre, and migrate the RSMACC databases to FactoryTalk AssetCentre. The steps below provide more detailed instructions. Be aware that there will be a period of time during the migration process during which no data will be logged to either the RSMACC databases or the FactoryTalk AssetCentre database.

1. Have all users check in their files to the RSMACC Archive module.
2. Optional. You may wish to purge old data that is no longer needed before continuing.
 - To purge old Archive data, use the RSMACC Archive Cleanup Utility in the RSMACC Archive Administration Utility. The RSMACC Archive Administration Utility can be found in the Rockwell Software > RSMACC Server program group on your RSMACC server computer. For instructions, see the online help in the RSMACC Archive Administration Utility.
 - To remove old data from the RSMACC Event and Audit database, use the RSMACC Event and Audit Database utility. The RSMACC Event and Audit Database utility can be found in the Rockwell Software > RSMACC Server program group on your RSMACC server computer. For instructions, see the online help in the RSMACC Event and Audit Database utility.
3. Optional. You may wish to make notes on the schedules that you have set up in the RSMACC Verification module. These schedules will not migrate over to FactoryTalk AssetCentre and will have to be recreated.
4. Shut down the RSMACC client software as well as other Rockwell Automation software such as RSLogix 5 on all RSMACC client computers.
5. Use the Windows Add/Remove Programs utility to uninstall the RSMACC client and related software from the RSMACC client computers and from the RSMACC server if you have it installed there. Uninstall the software in the following order:
 - a. Uninstall the RSMACC Change Management Client software.
 - b. Uninstall the RSMACC Client Core software.
 - c. Uninstall the Security Server Client software. If you have other products that still use RSSecurity, you can install the RSSecurity Emulator. For help on installing the RSSecurity Emulator, refer to the RSSecurity Migration help which can be



found via the Help button in the Import RSSecurity Configuration tool. The Import RSSecurity Configuration tool can be found in the Rockwell Software > FactoryTalk Tools program group.



From this point, until step 12, no event, audit, or device health information will be logged. If a user were to open a Rockwell Software program, for example to make edits to a ladder logic program, no event or audit information would be logged.

6. On the RSMACC server computer, stop and disable the following services:
 - RSMACC Verification Service
 - RSMACSM (the Service Monitor Service)
7. Uninstall RSMACC server software from all computers on which it resides.
 - a. Uninstall the RSMACC Verification Module.
 - b. Uninstall the RSMACC Change Management Module Server.
 - c. Uninstall the RSMACC Server.
8. Using Microsoft SQL Server 2000 Enterprise Manager, back up your RSMACC databases. (See your Microsoft SQL Server 2000 documentation for information about backing up databases.)
9. Optional. If upgrading your Microsoft SQL Server software, do that now.
10. Install FactoryTalk AssetCentre as instructed in:
 - Chapter 4 “Installing the FactoryTalk AssetCentre server” beginning on page 15
 - Chapter 5 “Installing FactoryTalk AssetCentre clients” beginning on page 37
 - Chapter 6 “Installing FactoryTalk AssetCentre agents” beginning on page 47

The FactoryTalk AssetCentre system is now logging system events and audits.
11. Migrate the RSMACC databases to the FactoryTalk AssetCentre database. On the FactoryTalk AssetCentre server computer, select **Start > All Programs > Rockwell Software > FactoryTalk AssetCentre Server > Database Migration Wizard**. Follow the instructions in the wizard to migrate the data.

For the Event, Audit, and Diagnostics and Health databases, migrated data simply shows up in the logs in the FactoryTalk AssetCentre client along with new data. For the RSMACC Archive database, migrated data appears in a separate folder in the asset tree in FactoryTalk AssetCentre. One of the first things you'll do in FactoryTalk AssetCentre is to set up the asset tree to represent your plant. To incorporate the migrated data into your newly designed asset tree, see step 15 on page 12.

12. Use the FactoryTalk Administration console to configure users and computers for FactoryTalk AssetCentre and to set feature security. See Chapter 7, “Configuring FactoryTalk AssetCentre” beginning on page 59.



Never explicitly deny rights to the All Users or Administrators group in FactoryTalk. Rather, set up specific user groups of your own and deny rights to those groups. Denying rights to the All Users or Administrators groups could lock everyone including administrators out of the system or remove the ability to modify security settings. This could also deny rights in all FactoryTalk-enabled products using FactoryTalk version 2.10 (CPR 9).

13. Migrate and remove RSSECURITY Server. See the RSSECURITY Migration online help for instructions.
 - a. Backup the RSSECURITY database.
 - b. On the FactoryTalk Directory computer use the Import RSSECURITY Configuration tool to import your RSSECURITY database into the FactoryTalk Directory. The Import RSSECURITY Configuration tool can be found in the Rockwell Software > FactoryTalk Tools program group.
 - c. If you have other products that still require RSSECURITY, you can install the RSSECURITY Emulator. For help on installing the RSSECURITY Emulator, refer to the RSSECURITY Migration help which can be found via the Help button in the RSAssetSecurity Import tool.
 - d. Use Add/Remove Programs to uninstall Security Server Network Edition.
14. Use the instructions in the online help or the “FactoryTalk AssetCentre Getting Results Guide” to set up the asset tree (design it and add assets) in the FactoryTalk AssetCentre client software. You can use any client in the system to do this.
15. Associate device files formerly stored in the RSMACC Archive module with devices in the asset tree in FactoryTalk AssetCentre. When you migrated the RSMACC database, a folder called “File Repository (Imported from RSMACC)” was added to the asset tree. This folder contains all the files and folders that you had in the RSMACC Archive module. For each device in the tree, move the associated files from the imported File Repository folder, to the device in the asset tree. Then open the device’s properties and specify that file in the Configuration Data field. See the online help for detailed instructions on editing an asset’s properties.
16. Recreate the schedules that you had set up in RSMACC. For instructions, in the FactoryTalk AssetCentre client select **Help > Contents** and open the **Schedules - Disaster Recovery** book.

3

Upgrading FactoryTalk AssetCentre from v. 2.00 (CPR 7) to v. 2.21 (CPR 9)

FactoryTalk AssetCentre v. 2.21 relies on FactoryTalk Services Platform 2.10. To upgrade FactoryTalk AssetCentre, you must also upgrade from FactoryTalk Automation Platform 2.00. This is automatically taken care of in the FactoryTalk Services Platform portion of the FactoryTalk AssetCentre installation. Other FactoryTalk-enabled products will also have to be upgraded to their CPR 9 versions. A list of products requiring an upgrade will be provided during the FactoryTalk Services Platform installation.

When you upgrade a computer from FactoryTalk Automation Platform 2.00 (CPR 7) to FactoryTalk Services Platform 2.10 (CPR 9), the installation process automatically creates a backup of your existing FactoryTalk Directory configurations. If something goes wrong during the installation, you can restore the system from this backup. Information about the location of the backup files is provided during installation.

In addition, while the installation process updates each directory with support for new policy settings and new features, it leaves your original directory configurations intact. It does not change your existing policy or security settings. For details, see FactoryTalk Security Help.

Upgrading to CPR 9



It is very important that FactoryTalk AssetCentre 2.00 be removed from ALL client and agent computers BEFORE uninstalling the FactoryTalk AssetCentre 2.00 software from the server.

To upgrade FactoryTalk AssetCentre:

1. Uninstall FactoryTalk AssetCentre from the clients and agents using Add or Remove Programs from the Windows Control Panel.

On this computer...	Remove these components...
clients	FactoryTalk AssetCentre Client FactoryTalk AssetCentre Common Components
agents	FactoryTalk AssetCentre Agent FactoryTalk AssetCentre RA Disaster Recovery Agent FactoryTalk AssetCentre Common Components

2. Uninstall FactoryTalk AssetCentre from the server using Add or Remove Programs from the Windows Control Panel.

On this computer... Remove these components...

server	FactoryTalk AssetCentre Server
	FactoryTalk AssetCentre Common Components

3. Install FactoryTalk AssetCentre according to the instructions in Chapters 4-6. During the FactoryTalk Services Platform portion of the installations, FactoryTalk will be upgraded and a message will inform you of other Rockwell Software products that rely on FactoryTalk Services Platform and need to be updated.
4. Upgrade your other FactoryTalk-enabled products according to the instructions provided with each product.

4

Installing the FactoryTalk AssetCentre server

If you have an RSMACC system, read Chapter 2, “Converting an RSMACC system” before continuing.



IMPORTANT: If you are using a firewall (such as the Windows Firewall), you must manually permit **File and Printer Sharing** through your firewall. Consult the documentation for your firewall software for instructions. You must also open Port 80 (or whatever port used for HTTP).

Setting up the FactoryTalk AssetCentre server requires installing and configuring several software packages. These are listed on the FactoryTalk AssetCentre installation menu. The server installation step in the menu launches a series of software installations and utilities as illustrated in the diagram below. The yellow numbers in the diagram show the order of the steps.

FactoryTalk AssetCentre Server Preparation and Installation

The yellow numbers correspond to choices on the FactoryTalk AssetCentre installation menu.

1 Read Documentation
(view the Installation Guide and Getting Results Guide)

2 Install Internet Information Services

3 Install Microsoft SQL Server

4 Install FactoryTalk Activation

5 Install FactoryTalk AssetCentre Server

Windows Installer

Microsoft .NET Framework

FactoryTalk Services Platform (FTSP)
(includes checking and configuring FTSP)

FactoryTalk AssetCentre Server
Includes:

- installing the FactoryTalk AssetCentre database
- creating the user account that the server will use to access the database
- configuring server settings.

FactoryTalk AssetCentre Common Components

FactoryTalk AssetCentre Calibration Management Components

Windows Firewall Configuration Utility

For information on installing this software:	See page:
2) Microsoft Internet Information Services (IIS), version 5.0 or higher	17
3) Microsoft SQL Server 2005 SP 1 or higher (recommended) or Microsoft SQL Server 2000 SP 4 or higher	18 73
4) FactoryTalk Activation	22
5. FactoryTalk AssetCentre server software	26



If you have purchased the Calibration Management capability for FactoryTalk AssetCentre, you will also install the ProCalV5 server software on the FactoryTalk AssetCentre server computer. This step comes after you have installed IIS and the Microsoft SQL Server. You can also install the ProCalV5 server software after the FactoryTalk AssetCentre server software; however you will have to run the ProCalV5 Data Source Edit Wizard as described on page 35.

Installing Internet Information Services

Microsoft Internet Information Services (IIS) is provided with Windows 2000 Server and Windows Server 2003. However, it is not installed by default. You must install this software on the server before installing FactoryTalk AssetCentre server software.

You may want to run Windows Update to make sure you have the most recent IIS patches before proceeding.

To install IIS:

1. Log onto the FactoryTalk AssetCentre server computer as an administrator (or a user with administrative privileges).
2. Click **Start > Settings > Control Panel** to display the Windows Control Panel.
3. In the Control Panel, open **Add/Remove Programs**.
4. In the Add/Remove Programs application, click the **Add/Remove Windows Components** icon. This starts the Windows Components Wizard.
5. **For Windows Server 2003:** In the Windows Components Wizard, click **Application Server**, and then click **Details**. Select the box for **Internet Information Services (IIS)**. Click **Internet Information Services (IIS)**, and then click **Details**. Make sure the following boxes are checked, and then click **OK**.
 - Common Files
 - Internet Information Services Manager
 - SMTP Service (if you do not have another mail server that you are going to use)
 - World Wide Web Service

(If these boxes are already checked, cancel out of the Windows Components Wizard. IIS is already installed.)

For Windows 2000 Server: In the Windows Components Wizard, select the box next to **Internet Information Services (IIS)**.

Click Internet Information Services (IIS), and then click **Details**. Make sure the following boxes are checked, and then click **OK**:

- Common Files
- Internet Information Services Snap-In
- Internet Services Manager (HTML)
- SMTP Service (if you do not have another mail server that you are going to use)
- World Wide Web Server

(If the appropriate boxes are already checked, click **Cancel**. IIS is already installed.)

6. Click **Next**. Windows installs IIS. Windows may prompt you to insert your operating system disc during the installation.

*Optional: If you want to use a web site other than the "Default Web Site" for IIS, create that web site now in Computer Management (Right-click **My Computer**, select **Manage** or **Administrative**, then **Internet Information Services (IIS) Manager**.)*

Installing Microsoft SQL Server 2005

If you are converting from an RSMACC system, see Chapter 2, "Converting an RSMACC system" for the proper procedure. That chapter will direct you to install SQL Server 2005 at the appropriate time.

FactoryTalk AssetCentre uses a Microsoft SQL Server database to store project files and user data. We recommend Microsoft SQL Server 2005 (Enterprise or Standard) for use with FactoryTalk AssetCentre, although you can use Microsoft SQL Server 2000. If you wish to install SQL Server 2000 instead, see Appendix A on page 73.

You may install SQL Server on the FactoryTalk AssetCentre server computer or on a separate server computer. If you already have SQL Server 2005 installed, you can skip these steps (however, you may need to reconfigure the SQL server).



If you use an existing SQL Server installation:

The SQL Server collation must be dictionary-order, case-insensitive for use with FactoryTalk AssetCentre software. If your existing SQL Server collation is case-sensitive, the FactoryTalk AssetCentre database installation will fail. Follow the directions here if your SQL Server collation is NOT dictionary-order, case-insensitive.

- If this SQL Server has no other databases on it:

Either: Uninstall SQL Server and reinstall it using the default collation in the setup program. (This statement applies to English language Microsoft Windows operating systems and SQL Server software. For other languages, be sure to select a dictionary-order, case-insensitive collation when reinstalling.)

Or: Rebuild the master database using a dictionary-order, case-insensitive collation. Refer to the SQL Server 2005 online books for instructions.

- If this SQL Server has other databases on it, then setup or use another SQL Server that is configured with a dictionary-order, case-insensitive collation.

If you have an MSDN subscription you can find more information at <http://msdn2.microsoft.com/en-us/library/ms143508.aspx> or search Microsoft's MSDN site for SQL Server 2005 collation settings.

To install SQL Server 2005 so it is compatible with FactoryTalk AssetCentre server:

1. Log onto the server computer as an administrator or as a user with administrative rights.



It is possible to install SQL Server 2005 on a different computer from the one on which you will install the FactoryTalk AssetCentre server software.

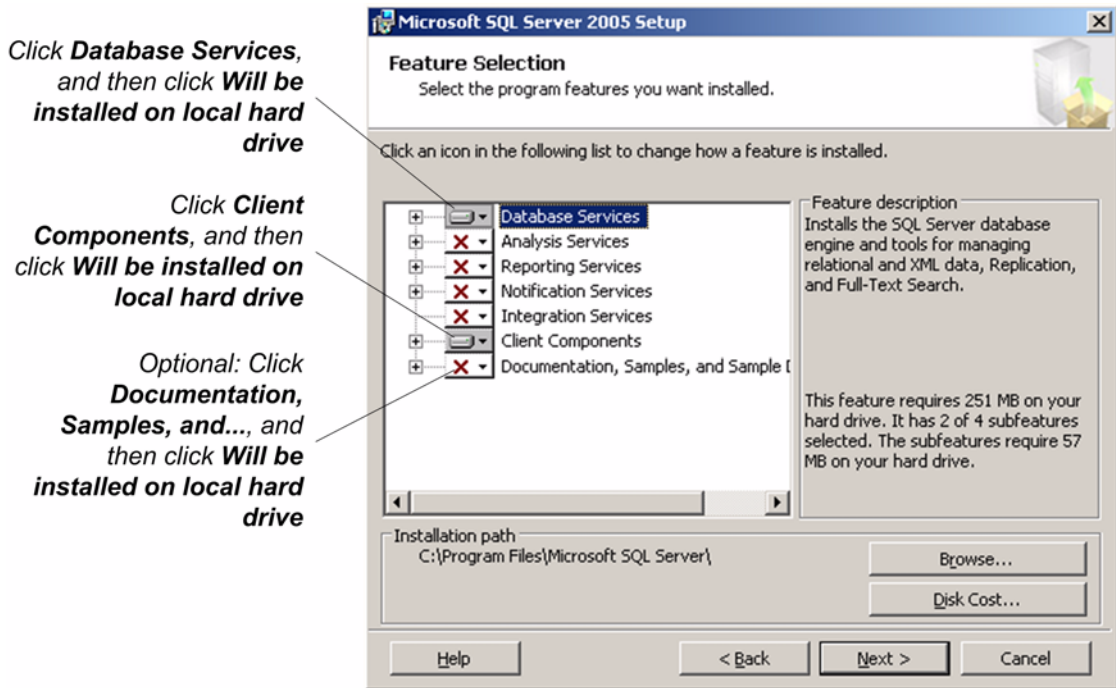
2. Start the SQL Server 2005 installation from the SQL Server 2005 disc(s).
3. Follow the on-screen instructions for installation until you get to the **Components to Install** screen.
4. The Components to Install screen asks which components of SQL Server 2005 you want to install. If you like, or if your business requires you to do so, you may install the complete SQL Server 2005 installation.

If you want to install only those components necessary to run the FactoryTalk AssetCentre server:

- a. Click the **Advanced** button. This displays the Feature Selection screen.

- b. On the Feature Selection screen, click the icon for **Database Services**, and then click **Will be installed on local hard drive**. Click the icon for **Client Components**, and then click **Will be installed on local hard drive**.

You may also want to install the documentation component. The other icons should have a red X indicating that they will not be installed.



- c. Click the plus sign next to **Database Services**. Make sure the following are set to install on the local hard drive:
- Data Files
 - Replication
 - Full-Text Search
 - Shared Tools
- d. Click the plus sign next to **Client Components**. Make sure the following are set to install on the local hard drive:
- Connectivity Components
 - Management Tools
 - SQLXML Client Features
 - Legacy Components

- e. Optional. Click the plus sign next to **Documentation, Samples, and ...**. Make sure **SQL Server Books Online** is set to install on the local hard drive.
 - f. Click **Next**.
5. The Services Accounts window of the installation program asks how you want to run the services for the SQL Server. Select **Use the built-in System account** and select **Local System** from the associated list.



You can run the SQL Server using a domain account. This can, however, complicate system maintenance (for instance, when changing passwords). If you are not sure of the type of account you should use for running the SQL Server, consult your network administrator.

6. In the Authentication Mode window, click **Mixed Mode (Windows Authentication and SQL Server Authentication)**. This means that both the SQL Server and the Windows domain can authenticate users for the SQL Server.

FactoryTalk AssetCentre uses SQL Server authentication.

When you click Mixed Mode, fields open for entering the password for the sa (SQL Server system administrator) account password. **Do not forget the password.** You will need this password when you install the FactoryTalk AssetCentre server.



Do not leave the password blank. Doing so leaves your SQL Server and your computer open to attack.

7. In the Collation Settings window, select **SQL collations** and then the dictionary-order, case-insensitive collation option.



The collation settings must be case-insensitive! If the settings are case-sensitive, the FactoryTalk AssetCentre database installation will fail.

8. Follow the on-screen instructions to complete the installation.



After you install Microsoft SQL Server 2005, you **must install SQL Server 2005 Service Pack 1 (or higher)**! See below.

Installing Microsoft SQL Server 2005 Service Packs

After you install Microsoft SQL Server 2005, you **must** install SQL Server 2005 Service Pack 1 or higher. The service pack is necessary for the software to run properly and will protect your SQL Server 2005 server from certain types of attacks.

To obtain the service packs, go to Microsoft's website, www.microsoft.com, and search for "SQL Server 2005 Service Pack".

Minimum Microsoft SQL Server 2005 Permissions

The AssetCentreUser SQL user's default database value can be "master" or "AssetCentre". By default, the database value is set to "AssetCentre". The AssetCentreUser SQL user needs to belong to the following AssetCentre database roles:

- db_dataexecute
- db_datareader
- db_datawriter
- public

The "db_dataexecute" database role is added to the FactoryTalk AssetCentre database at install time. It is used to group execute permissions of stored procedures and functions within the AssetCentre database.

All of the user stored procedures and user functions in the FactoryTalk AssetCentre database need to have the "Execute" permission granted to the "db_dataexecute" database role.

Installing the ProCalV5 server software

If you have purchased the Calibration Management capability for FactoryTalk AssetCentre, you next install the ProCalV5 server software on the FactoryTalk AssetCentre server computer. This step comes after you have installed IIS and the Microsoft SQL Server software.



You can also install the ProCalV5 server software after the FactoryTalk AssetCentre server software as described on page 34.

1. Start the ProCalV5 installation from the ProCalV5 disc.
2. Open and review the ProCalV5 Installation Guide, located on the ProCalV5 disc in the Product_Documentation\Installation Guide directory (click Product Documentation on the ProCalV5 install screen).
3. Follow the on-screen instructions for the installation.

Installing FactoryTalk Activation

FactoryTalk AssetCentre software uses a software activation system called FactoryTalk Activation and is activated on two criteria: capacity (number of devices) and capability (purchased functionality). In addition, activation is required for the FactoryTalk AssetCentre server.



- **Capacity** is the number of device assets that can be represented in your FactoryTalk AssetCentre software.

By default (and without activation), you are permitted to add up to ten device or process device assets in your FactoryTalk AssetCentre software. Above that, the number of devices and process devices you are permitted depends on the quantity of capacity activation you have purchased. Only device and process device assets count for capacity activation. You can add as many files, folders, file links, generic devices, and generic containers as your system requires.

- **Capabilities** are additional features you can add to enhance your FactoryTalk AssetCentre system.

Currently, the only capabilities for purchase are:

- Calibration Management
- Disaster Recovery for Rockwell Devices
- Disaster Recovery for Motoman Robots
- Disaster Recovery for FANUC Robots

All of the other features of FactoryTalk AssetCentre are available by default. Other capabilities will be available in future releases.

FactoryTalk AssetCentre clients do not require activation. All activations for FactoryTalk AssetCentre are locked to the FactoryTalk AssetCentre server. If you add activations to the system in the future, you will have to refresh activation. On any computer with the FactoryTalk AssetCentre client software, select **Help > About**. Select **FactoryTalk AssetCentre Server Features** in the Components list, and click **Refresh**.

For more detailed information on activation for FactoryTalk AssetCentre, see the online help. For more information on FactoryTalk Activation, see the “Activate Rockwell Software Products” insert that came with your FactoryTalk AssetCentre software or the online help for the FactoryTalk Activation tool.



You will need an Internet connection to install activation. If you do not have an internet connection, see the “Activate Rockwell Software Products” insert that came with your software.

Installing the FactoryTalk Activation server and activating the software

The FactoryTalk Activation system uses an activation server to store and manage client activations. You do not have to install the FactoryTalk Activation server on the same computer that will run the FactoryTalk AssetCentre server.

If you already have a FactoryTalk Activation server in your facility, you can use that server to activate FactoryTalk AssetCentre. If you use an existing FactoryTalk Activation server, skip to “Installing the FactoryTalk Activation client and activating the software” on page 25.

To install the FactoryTalk Activation server:

1. Log onto the computer on which you want to install the software as an administrator (or a user with administrative privileges).
2. Insert the FactoryTalk AssetCentre disc into your computer.
3. The installation program should start automatically. If it does not, open the FactoryTalk AssetCentre disk in My Computer and then run the **Setup.exe** program.
4. In the FactoryTalk AssetCentre installation program, click **Install FactoryTalk Activation Components**.
5. Click **Install FactoryTalk Activation Server v3.00.00 (CPR 9)**. Follow the on-screen instructions to complete the server installation. If the HASP Device Driver Installation opens while you are installing the FactoryTalk Activation server, click **Next** to continue the device driver installation.
6. Once the Activation Wizard opens, you will proceed differently depending on whether you are installing the FactoryTalk Activation server on the FactoryTalk AssetCentre server computer or on a separate computer.
 - If installing on separate computers: complete the installation, but when the Activation Wizard opens, click **Cancel** and exit both the wizard and the FactoryTalk Activation tool. Skip the remaining steps below and go to “Installing the FactoryTalk Activation client and activating the software” on page 25.
 - If installing on the same computer: continue following the steps below.
7. If you have a dongle, attach it to the USB port of your computer. (FactoryTalk Activation requires a specific USB dongle available from Rockwell Automation. The part number is 9509-USBDONG.)
8. When the Activation Wizard opens, select the **Use expert interface to activate multiple products** checkbox on the first screen. This will allow you to get all the activations you need for FactoryTalk AssetCentre at once: server activation, capacity

activation, and capability activations (such as Disaster Recover for Rockwell Devices). Continue following the instructions in the wizard to obtain your activations.



Do not lock activations to virtual network adapters, such as those used for virtual private networks (VPN) or virtual machines. Instead, lock activations to the Host IDs of fixed hardware devices, such as hardware network adapters or hard disk serial numbers.

Installing the FactoryTalk Activation client and activating the software

FactoryTalk AssetCentre must be activated before you can use it. (For information on how activation works with FactoryTalk AssetCentre, see “Installing FactoryTalk Activation” on page 22.) Activation takes place through the FactoryTalk Activation client software.

If you...	Then...
have installed the FactoryTalk Activation server software on your FactoryTalk AssetCentre server computer	you do not need to install the FactoryTalk Activation client. It was installed with the server.
have installed the FactoryTalk Activation server on a different computer than your FactoryTalk AssetCentre server computer	you need to install the Activation client on the FactoryTalk AssetCentre server computer. Proceed with the steps below.
<p>already have the correct version of the FactoryTalk Activation client on your FactoryTalk AssetCentre server computer.</p> <p>(If you have already installed the correct version of the client, the Welcome screen of the FactoryTalk Activation client installation program will say, “The InstallShield(R) Wizard will allow you to modify, repair, or remove FactoryTalk Activation client.” If you see those options, you can cancel the installation.)</p>	<p>you do not need to install it again. Open the Activation Wizard to activate your software. To open the Activation Wizard:</p> <ul style="list-style-type: none"> ■ Run the FactoryTalk Activation Tool from the Rockwell Software > FactoryTalk Activation program group. ■ Select the Get Activations tab. ■ Click Open Activation Wizard.

To install the FactoryTalk Activation client:

1. Log onto the computer on which you want to install the software as an administrator (or a user with administrative privileges).
2. Insert the FactoryTalk AssetCentre CD-ROM into your computer’s CD-ROM drive.
3. The installation program should start automatically. If it does not, open the FactoryTalk AssetCentre disk in My Computer and then run the **Setup.exe** program.

4. In the installation program, select **Install FactoryTalk Activation Components**.
5. Click **Install FactoryTalk Activation Client v3.00.00 (CPR 9)**. Follow the on-screen instructions to complete the client installation.

If the HASP Device Driver Installation opens while you are installing the FactoryTalk Activation server, click Next to continue the device driver installation.

6. Continue following the instructions on the screen to complete the FactoryTalk Activation client installation.
7. Immediately following the FactoryTalk Activation client installation, the setup program launches the FactoryTalk Activation Wizard and the FactoryTalk Activation Tool. Use the wizard to obtain your FactoryTalk AssetCentre activations. Because you most likely need multiple activations for FactoryTalk AssetCentre (server activation, capacity activation, and capability activation), select the **Use expert interface to activate multiple products** checkbox on the first screen of the Activation Wizard.



Do not lock activations to virtual network adapters, such as those used for virtual private networks (VPN) or virtual machines. Instead, lock activations to the Host IDs of fixed hardware devices, such as hardware network adapters or hard disk serial numbers.

Installing the FactoryTalk AssetCentre server software

To install the FactoryTalk AssetCentre server software:

1. Log onto your server computer as an administrator or as a user with administrative privileges.
2. Insert the FactoryTalk AssetCentre installation disk into your computer.
3. The setup program should start automatically. If it does not, open the FactoryTalk AssetCentre disk in My Computer and then run the **Setup.exe** program.
4. In the setup program, click **Install FactoryTalk AssetCentre Server**.
5. The Install FactoryTalk AssetCentre Server window opens. The installer searches the computer for required components and displays the results in this window. The installer will not attempt to install components that already exist on the computer. Components that will be installed are indicated with a computer icon and a checked box. You cannot select or clear the checkboxes in this window.



If you see a red "X" next to one or more components, this means that the installer cannot determine whether the component should be installed. Contact Technical Support using the contact information provided on page ii.



Click **Start** to begin the installation process.

6. Follow the on-screen installation instructions for the components that need to be installed.



The installation of some components may require you to restart your computer. If this is the case and the setup program has not finished installing all of the necessary components, the setup program will restart the next time you log onto your computer.

The following components are checked for and installed or configured during the server installation:

- **Windows Installer 3.1 v2.**
- **Microsoft .NET Framework.** The FactoryTalk AssetCentre server requires that Microsoft .NET Framework versions 1.1 (with Service Pack 1) and 2.0 be installed on your computer. If these components are not already installed on your computer, the setup program will install them.
- **FactoryTalk Services Platform 2.10.00 (CPR 9).** See “Installing the FactoryTalk Services Platform” on page 27.
- **Check and Configure FTSP.** This occurs during the FactoryTalk Services Platform installation. See the substeps in step 4 on page 28.
- **FactoryTalk AssetCentre Server.** See “The FactoryTalk AssetCentre server installer” on page 29.
- **FactoryTalk AssetCentre Setup Package.** See “FactoryTalk AssetCentre Setup Package installer” on page 31.
- **FactoryTalk AssetCentre Common Components.** See “FactoryTalk AssetCentre Common Components installer” on page 32.
- **FactoryTalk AssetCentre Calibration Management Server.** See “FactoryTalk AssetCentre Calibration Management Server installer” on page 32.
- **Launch Rockwell Windows Firewall Configuration Utility.** See “Using the Windows Firewall Configuration Utility” on page 33.

Installing the FactoryTalk Services Platform

See “Installing the FactoryTalk AssetCentre server software” on page 26 for the steps to get to this part of the installation.

FactoryTalk AssetCentre depends on the Rockwell Software FactoryTalk Services Platform to function. If the platform is not installed on your computer (or if the correct version is not installed), the setup program will install it. If you have a previous version of

the platform installed, you may need to uninstall it before continuing (the setup program will inform you if this is the case).



By default, all members of the Administrators group on the computer on which you are installing the FactoryTalk Services Platform are added to the Administrators group in the FactoryTalk Directory.

1. Follow the on-screen installation instructions to install the platform.
2. When you are asked whether you want to install the FactoryTalk Administration Console, be sure the checkbox is selected (you will need the console to help you configure the FactoryTalk Directory). Continue to follow the on-screen instructions.
3. Click **Finish** on the InstallShield Wizard for FactoryTalk Services Platform.



Respond to the FactoryTalk Directory Server Configuration window, explained in step 4, with care. Correctly identifying the FactoryTalk Directory is essential to a properly functioning system.

4. The FactoryTalk Directory Server Configuration window asks if the computer on which you are installing the software is also the computer that will be the FactoryTalk Directory server. If this is the case, click **Continue** and go on to step 5. If the FactoryTalk Directory server is on a different computer, click **Select FactoryTalk Directory Server** and continue with the instructions below.
 - a. The utility may ask you to log on to FactoryTalk. Log on with your Windows administrator username and password. (As mentioned earlier, members of the Windows Administrators user group were automatically added to the FactoryTalk Directory.)
 - b. In the FactoryTalk Directory Server Location Utility window, note the name in the **Computer hosting directory server** field. (Most likely, this field will contain *localhost*, which is correct only if you are using the computer that actually is the FactoryTalk Directory Server.) If the name in the field is not the name of your FactoryTalk Directory Server, click the browse button next to the field.
 - c. In the next window, select **Remote computer**. Type the name of your FactoryTalk Directory Server in the field, or click the browse button next to the field to browse for the server.
 - d. Once you have the name of the FactoryTalk Directory Server in the field, click **OK**, and then click **OK** again.
 - e. If you chose a different computer to be the FactoryTalk Directory Server, you will see a window saying that you will need to restart your computer. Click **OK**. The



software attempts a connection to the FactoryTalk Directory Server. You may be asked to log onto the server. If you are, **enter the username and password for a Network Directory server administrator on the FactoryTalk Directory Server**, and then click **OK**.

- When you see a checklist window showing that the FactoryTalk Services Platform components were all installed and configured, click **Continue**. This will proceed to the next segment of the FactoryTalk AssetCentre server installation.

The FactoryTalk AssetCentre server installer

See “Installing the FactoryTalk AssetCentre server software” on page 26 for the steps to get to this part of the installation.

After the setup program checks your FactoryTalk Services Platform installation, it starts the installation for the FactoryTalk AssetCentre server software.



If you have a firewall (such as the Windows Firewall) installed on your server computer, you may see warnings that the Scheduler Service and trace diagnostics are being blocked. For FactoryTalk AssetCentre to function correctly, you must unblock traffic for these services.

Follow the on-screen instructions to install the FactoryTalk AssetCentre server.



If you have created another web site for IIS (see page 18) you will see a Select Web Site dialog box. Select the web site you want to use and click OK.

Some additional utilities and windows appear during the installation:

■ Database Installer

This utility installs the FactoryTalk AssetCentre databases. First, it needs to know the location of the database server and the SQL Server administrator username and password.

If you see an error message about invalid SQL collation, you will need to fix the SQL Server collation before continuing with the FactoryTalk AssetCentre installation. See “SQL collation error encountered during database installation” on page 65.

By default, the server location is set to **(local)**. There are instances where this is not the correct setting.

If you installed the SQL Server software here:

Then enter this in the Server field:

In the default location (the computer running the FactoryTalk AssetCentre server software) and default (local) instance.

If you installed the SQL Server software here:	Then enter this in the Server field:
On a different computer than will run the FactoryTalk AssetCentre server software but in the default (local) instance.	The name or IP address of the computer on which you installed the SQL Server.
On a named instance of SQL Server (whether or not you installed the SQL Server on the same computer where you are installing the FactoryTalk AssetCentre server software).	The name or IP address of the server and the instance where you installed the SQL Server. For example, if you installed the database on a computer called MYSERVER and named the instance MYINSTANCE, you would type MYSERVER\MYINSTANCE in the field.

For the user credentials, the utility is looking for the system administrator account (sa) you created when you installed the SQL Server. Type **sa** in the **Username** field, and the password for the sa account in the **Password** field. If someone else installed SQL Server, get the correct administrator username and password. Click **Start**.

Wait while the database is installed and then fill out the Database User Configuration window (described below).

■ **Database User Configuration Window**

This window is asking you to create a database user for the FactoryTalk AssetCentre software to use to access the database. You can accept the information provided or enter a different username and password, then click **OK**. If you provide a username and password, provide a SQL user account, not a Windows user account.

After you click OK, the software will ask if you want to create a new login for the database. Click **Yes**.

After running the Database User Configuration utility, the software may ask you to log onto FactoryTalk. If so, log on using a FactoryTalk Administrator account.

■ **Configure Server Settings Utility**

Use the Configure Server Settings Utility to configure the port and e-mail settings that dictate how the FactoryTalk AssetCentre Server software communicates with other computers.

This setting:	Does this:
Server Location	Sets the name of the FactoryTalk AssetCentre server computer. Change this setting only if you want to move the server to another computer.



This setting:	Does this:
Base IP Port	Sets the Internet Protocol (IP) port that the FactoryTalk AssetCentre Scheduler Service will use. By default, this port is 7002. The system uses the base port, plus the next two consecutive ports. So by default 7002 to 7004 are reserved. If you specify 7000, for example, 7000 through 7002 would be reserved.
SMTP Server	Specifies the SMTP (Simple Mail Transport Protocol) address of your outgoing SMTP (e-mail) server. For example, mailrelay.myplant.com. The domain provided here (myplant.com in the example above) is used to form the address from which e-mail notifications from FactoryTalk AssetCentre will be sent. The "From" e-mail address will be FACTORYTALKASSETCENTRE_NOREPLY@yourdomain.com. If you do not know the name of your SMTP server, consult your network administrator.
SMTP Server IP Port	Sets the IP port used to communicate with your SMTP server. By default, this port is 25. Some facilities use a different port. If you do not know your SMTP port number, consult your network administrator. If you use a port other than 25 and are using a firewall, you'll have to also open that port in your firewall.

Click **OK** when the settings are as desired.

If you see messages indicating that the firewall has blocked a program, select **Unblock** on each message.

- On the final page of the FactoryTalk AssetCentre Server InstallShield Wizard, click **Finish**.

FactoryTalk AssetCentre Setup Package installer

See "Installing the FactoryTalk AssetCentre server software" on page 26 for the steps to get to this part of the installation.

Follow the on-screen instructions to install the Client Package. This creates the shared directory used by the install webpage to install the FactoryTalk AssetCentre client and FactoryTalk AssetCentre agent. This allows you to install FactoryTalk AssetCentre clients and agents on a remote machine without the Installation CD. Instead, you can install the software through Internet Explorer.

When asked to restart your computer, click **Yes**. You must restart the computer before attempting to run the FactoryTalk AssetCentre server.

FactoryTalk AssetCentre Common Components installer

See “Installing the FactoryTalk AssetCentre server software” on page 26 for the steps to get to this part of the installation.

Follow the on-screen instructions to install the common components. When asked to restart your computer, click **Yes**. You must restart the computer before attempting to run the FactoryTalk AssetCentre server.

If you see messages indicating that the firewall has blocked a program, select **Unblock** on each message.



Depending on the speed of your computer, you may see the Install FactoryTalk AssetCentre server window for a moment after you restart and log back onto your server computer. This behavior is normal (the installation program is designed to check to see if everything is installed correctly before proceeding).

AFTER REBOOTING

The installation software will initiate each component install again in sequence beginning with the FactoryTalk Services Platform. You can cancel the installation for all components that you have already installed. The list below provides a step-by-step sequence to cancel all installs that have been completed to this point. What you see may vary depending on your particular system.

1. Click **Start** on the Install FactoryTalk AssetCentre Server window.
2. Depending on your FactoryTalk Directory setting, you may see the stop sign window again about how to set the FactoryTalk Directory. See step 4 on page 28 to make the appropriate choice.
3. Click **Continue** on the Check FactoryTalk Services Platform Configuration window.
4. The Client Package Installer window appears. You do not need to create the Client Package again: click **Cancel**.
5. Finally, click **Start** on the Install FactoryTalk AssetCentre Server window.

FactoryTalk AssetCentre Calibration Management Server installer

See “Installing the FactoryTalk AssetCentre server software” on page 26 for the steps to get to this part of the installation.



The FactoryTalk AssetCentre Calibration Management Server must be installed in the same folder as the FactoryTalk AssetCentre Server.



Follow the on-screen instructions to install the Calibration Management server. After you install the FactoryTalk AssetCentre Calibration Management Server, you will see the ProCalV5 Connection Installer window. This step installs the database connection for ProCalV5. For this step, you will need to know the following information from the ProCalV5 server installation:

- The name of the SQL server for the ProCalV5 database
- The ProCalV5 SQL Server login name (default is pcV5us01) and password
- The name of the ProCalV5 SQL database.



If you have not installed the ProCalV5 server software, click **Skip**. You can install the ProCalV5 software after installing the FactoryTalk AssetCentre server software, and then create the ProCalV5 connection (described on page 34).

Using the Windows Firewall Configuration Utility

See “Installing the FactoryTalk AssetCentre server software” on page 26 for the steps to get to this part of the installation.



If you have a firewall other than Windows Firewall, use the information in “Network requirements” on page 5 and “Additional ports you may have to open” on page 77 to configure your firewall to allow communication through the appropriate ports and with specific processes.

IF YOUR OPERATING SYSTEM IS WINDOWS SERVER 2003 SP 1 OR HIGHER

This operating system supports Windows Firewall. The Windows Firewall Configuration Utility will run whether you are using the firewall or not.

- If your Windows Firewall/Internet Connection Sharing (ICS) service is stopped or is disabled, the FactoryTalk AssetCentre Windows Firewall Configuration window will indicate this with a red x. Click **Continue**. The FactoryTalk AssetCentre server installation is complete.

If you are using a firewall other than Windows Firewall, use the information in “Network requirements” on page 5 and “Additional ports you may have to open” on page 77 to configure your firewall to allow communication through the appropriate ports and with specific processes.

- If your Windows Firewall/Internet Connection Sharing (ICS) service is running, click **Start**. The Rockwell Software Windows Firewall Configuration Utility window opens. The list of exceptions (things to allow through the firewall) generally includes default SQL server and e-mail ports.
- If no exceptions need to be made, none will be listed and the Accept button will be unavailable. In that case, click **Exit** to close this utility.
- Click **Accept**. On the Confirm Windows Firewall Changes window make the appropriate selection depending on whether your Windows Firewall will be on or off, then click **OK**.

IF YOUR OPERATING SYSTEM IS WINDOWS 2000 SERVER

This operating system does not support Windows Firewall so the Windows Firewall Configuration Utility will not open.

Installing the ProCalV5 server software after the FactoryTalk AssetCentre server

If you have purchased the Calibration Management capability for FactoryTalk AssetCentre, you would normally install the ProCalV5 server software before you install the FactoryTalk AssetCentre server (as described on page 22). However, if you did not install the ProCalV5 server before the FactoryTalk AssetCentre server, you can install it now.



If you installed the ProCalV5 server before you installed the FactoryTalk AssetCentre server, do not install the ProCalV5 server again.

1. Start the ProCalV5 installation from the ProCalV5 disc.
2. Open and review the ProCalV5 Installation Guide, located on the ProCalV5 disc in the Product_Documentation\Installation Guide directory (click Product Documentation on the ProCalV5 install screen).
3. Follow the on-screen instructions for the installation.

You must then run the ProCalV5 Data Source Edit Wizard.



Running the ProCalV5 Data Source Edit Wizard

If you installed the ProCalV5 server AFTER you installed the FactoryTalk AssetCentre server, you must then run the ProCalV5 Data Source Edit Wizard to connect the ProCalV5 server to FactoryTalk AssetCentre.



This step is not necessary if you installed the ProCalV5 server before you installed the FactoryTalk AssetCentre server.

For this step, you will need to know the following information from the ProCalV5 server installation:

- The name of the SQL server for the ProCalV5 database
 - The ProCalV5 SQL Server login name (default is pcV5us01) and password
 - The name of the ProCalV5 SQL database
1. Click **Start > Programs > Rockwell Software > FactoryTalk AssetCentre Server > ProCalV5 Data Source Configuration**.
 2. Follow the on-screen instructions to connect the ProCalV5 server.

