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Asset Management

FactoryTalk® AssetCentre



INSTALLATION GUIDE

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Allen-Bradley • Rockwell Software

**Rockwell
Automation**

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1

Introduction

FactoryTalk® AssetCentre version 2.21.01 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.

Optional upgrades with CPR 9 SR 1

FactoryTalk AssetCentre provides optional upgrades from CPR 9 to CPR 9 SR 1 for these software products used by FactoryTalk AssetCentre:

- FactoryTalk Activation
- FactoryTalk Services Platform
- RSLinx Classic Lite
- RSLinx Enterprise

If you already have the CPR 9 version of these products installed, you do not need to reinstall them or upgrade them. FactoryTalk AssetCentre works with both CPR 9 and CPR 9 SR 1 versions of these products.

If you want to upgrade them to CPR 9 SR 1, you must do so manually by running **setup.exe** for the product on the installation disc. We recommend that you do this before installing FactoryTalk AssetCentre.



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 5).
 - 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 tries 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.



The operating system can be in English, Portuguese, French, Spanish, Italian, German, Japanese, Korean, or Chinese.



Note that some FactoryTalk AssetCentre capabilities can only be supported on an English language operating system. At this time, only the Calibration Management capability requires an English language operating system.

Hardware

Software

- | | |
|---|---|
| <ul style="list-style-type: none"> ■ Server class computer with 1.8 GHz or higher processor clock speed recommended. ■ CD-ROM or DVD drive ■ 1 GB of RAM (more, depending on application requirements) ■ 3 GB of free hard disk space (more, depending on application requirements), and an additional 100 GB of free hard disk space for data (10 GB additional free space for data is acceptable if SQL Server will be on a separate computer) ■ 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"> ■ Microsoft Windows Server 2003 with Service Pack 1 or higher or Microsoft Windows 2000 Server with Service Pack 4 or higher. ■ Microsoft SQL Server 2005 with Service Pack 1 or higher (we recommend the most recent service pack) or Microsoft SQL Server 2000 with Service Pack 4 or higher. (The SQL Server can be on a different computer than the FactoryTalk AssetCentre server.) |
|---|---|



Microsoft Corporation strongly recommends the use of a RAID-5 system for computers running SQL Server 2000 or SQL Server 2005.

Client and agent computer requirements

Computers running the FactoryTalk AssetCentre client or agents 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. The operating system can be in any language.



Note that some FactoryTalk AssetCentre capabilities can only be supported on an English language operating system. At this time, only the Calibration Management capability requires an English language operating system.



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 or CPR 9 SR 1.*■ 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 79.

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 2.21.01, 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, back up 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 or 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 RSecurity Configuration tool. The Import RSecurity Configuration tool can be found in the Rockwell Software > FactoryTalk Tools program group.



From this point, until step 10, 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 is displayed 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 61.



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 Services Platform version 2.00 (CPR 7), version 2.10.00 (CPR 9), or version 2.10.01 (CPR 9 SR 1).

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 or Remove Programs to uninstall Security Server Network Edition.
14. Use the instructions in the online help 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. 2.21.01 (CPR 9 SR 1)

FactoryTalk AssetCentre v. 2.21.01 relies on FactoryTalk Services Platform 2.10.00 or 2.10.01. 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 must also be upgraded to their CPR 9 versions. A list of products requiring an upgrade is provided during the FactoryTalk Services Platform installation.

When you upgrade a computer from FactoryTalk Automation Platform 2.00 (CPR 7) to FactoryTalk Services Platform 2.10.00 (CPR 9) or 2.10.01 (CPR 9 SR 1), 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 SR 1



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 through 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

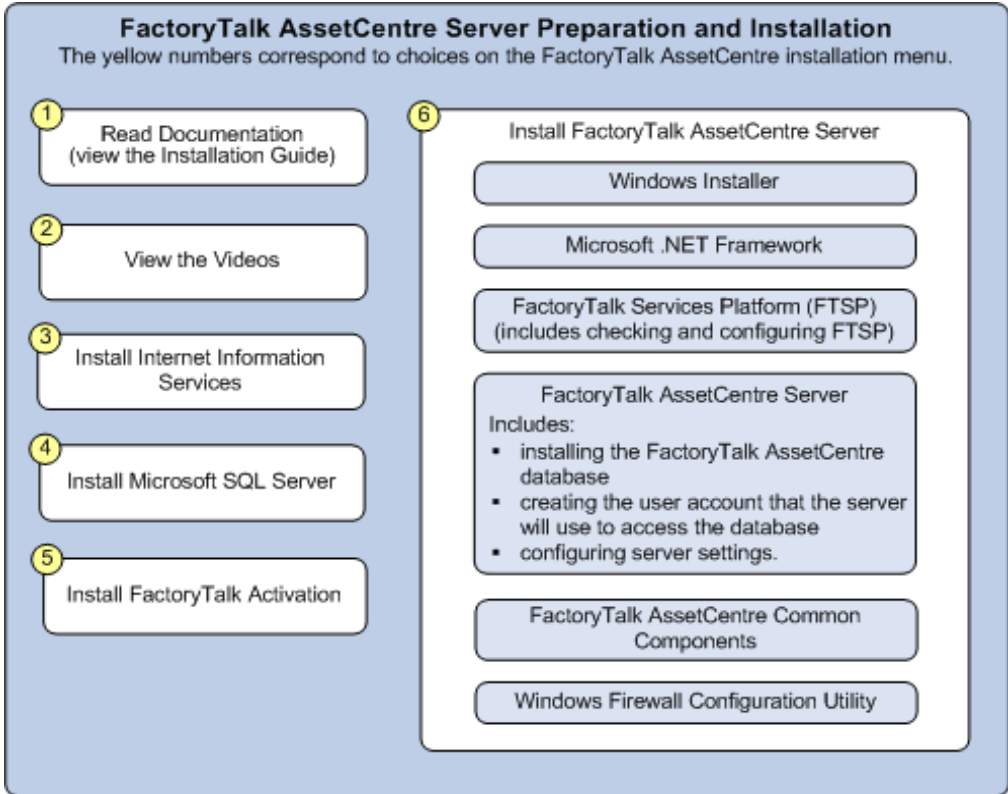
Installing the FactoryTalk AssetCentre server

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 is 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.



For information on installing this software:	See page:
3) Microsoft Internet Information Services (IIS), version 5.0 or higher	17
4) Microsoft SQL Server 2005 SP 1 or higher (recommended) or Microsoft SQL Server 2000 SP 4 or higher	18 75
5) FactoryTalk Activation	23
6) FactoryTalk AssetCentre server software	27

If you have purchased the Calibration Management capability for FactoryTalk AssetCentre, you must 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 36.

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 on to 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 or Remove Programs**.
4. In the Add or 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, under Services and Applications, click **Internet Information Services (IIS) Manager**. For more information, see your Windows Server documentation.*

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 directs 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 75.

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 the Microsoft MSDN site for SQL Server 2005 collation settings.

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

1. Log on to 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 install the FactoryTalk AssetCentre server software.

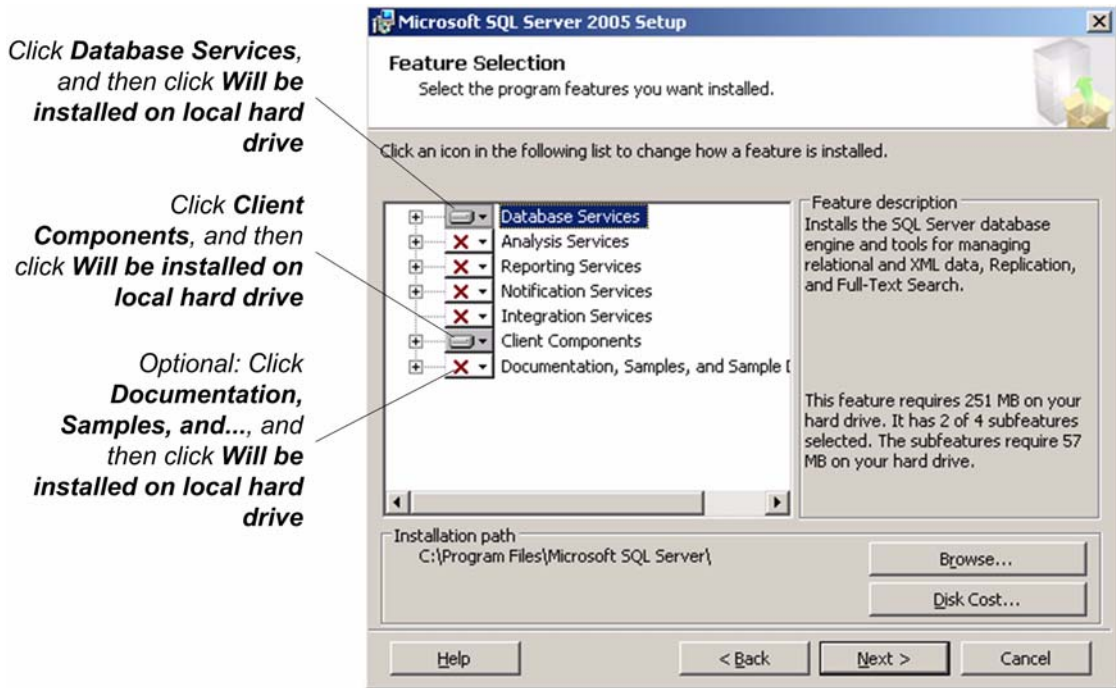
2. Start the SQL Server 2005 installation from the SQL Server 2005 discs.
3. Follow the on-screen instructions for installation until you get to the **Components to Install** screen.
4. The Components to Install screen asks which components of SQL Server 2005 you want to install. If you like, or if your 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 protects your SQL Server 2005 server from certain types of attacks.

To obtain the service pack, go to the Microsoft 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 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 35.

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.



FactoryTalk AssetCentre uses SQL Server authentication. Select SQL as the authentication method for the ProCalV5 database.



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 functions). Activation is required for the FactoryTalk AssetCentre server, but not clients or agents.

- **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 devices or process devices 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 ABB Robots
- 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.

To refresh activation:

1. On any computer with the FactoryTalk AssetCentre client software, select **Help > About**.
2. In the Components list, select **FactoryTalk AssetCentre Server Features**, and then click **Refresh**.

For more detailed information about activation for FactoryTalk AssetCentre, see the online help. For more information about 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 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.



If you already have FactoryTalk Activation server CPR 9 installed on your computer and you want to upgrade it to CPR 9 SR1, you must upgrade it manually from the installation disc, as described on page 1.

To install the FactoryTalk Activation server:

1. Log on to 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 disc in My Computer and then run the **Setup.exe** program.
4. Click **Install FactoryTalk AssetCentre v. 2.21.01 CPR 9 SR 1**.
5. Click **Install FactoryTalk Activation Components**.
6. Click **Install FactoryTalk Activation Server 3.01 (CPR 9 SR 1)**. Follow the on-screen instructions to complete the server installation.
7. If the HASP Device Drivers Installation opens while you are installing the FactoryTalk Activation server, click **Next** to continue the device driver installation. Follow the on-screen instructions.
8. Continue following the instructions on the screen to complete the FactoryTalk Activation server installation.
9. When the FactoryTalk Activation server installation is complete, follow the on-screen instructions to obtain an activation.



10. 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, 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.
11. 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.)
12. When the Activation Wizard opens, select the **Use the Expert Interface to activate multiple products** check box 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 Recovery 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 23.) 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.

If you...	Then...
<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 on to 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 disc in My Computer and then run the **Setup.exe** program.
4. Click **Install FactoryTalk AssetCentre v. 2.21.01 CPR 9 SR 1**.
5. Click **Install FactoryTalk Activation Components**.
6. Click **Install FactoryTalk Activation Client 3.01 (CPR 9 SR 1)**. Follow the on-screen instructions to complete the client installation.

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

7. Continue following the instructions on the screen to complete the FactoryTalk Activation client installation.
8. When the FactoryTalk Activation server installation is complete, follow the on-screen instructions to obtain an activation.
9. Once the Activation Wizard opens, 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 the Expert Interface to activate multiple products** check box 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 FactoryTalk AssetCentre server software

FactoryTalk AssetCentre works with either FactoryTalk Services Platform 2.10.00 (CPR 9) or 2.10.01 (CPR 9 SR 1). If you already have the CPR 9 version installed, you do not need to reinstall FactoryTalk Services Platform. If you do not have FactoryTalk Services Platform installed, FactoryTalk AssetCentre will install the CPR 9 SR 1 version.

If you already have the CPR 9 version installed and you wish to upgrade to the CPR 9 SR 1 version, you must manually upgrade it from the installation disc, as described on page 1. We recommend that you perform the upgrade before you begin installing the FactoryTalk AssetCentre server.




If you are also installing FactoryTalk AssetCentre client or agent on the server computer, and you want to use the CPR 9 SR 1 version of RSLinx Enterprise, you must also use the CPR 9 SR 1 version of FactoryTalk Services Platform.

If you already have the CPR 9 version of FactoryTalk AssetCentre server installed, it will be automatically upgraded to CPR 9 SR 1 in the steps that follow.

To install the FactoryTalk AssetCentre server software:


1. Log on to your server computer as an administrator or as a user with administrative privileges.
2. Insert the FactoryTalk AssetCentre installation disc into your computer.
3. The setup program should start automatically. If it does not, open the FactoryTalk AssetCentre disc in My Computer and then run the **Setup.exe** program.
4. Click **Install FactoryTalk AssetCentre v. 2.21.01 CPR 9 SR 1**.
5. Click **Install FactoryTalk AssetCentre Server**.
6. 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 check boxes 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 the copyright page at the beginning of this guide.

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

7. 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 on to 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) or 2.10.01 (CPR 9 SR 1).** See “Installing FactoryTalk Services Platform,” next.
- **Check and Configure FTSP.** This occurs during the FactoryTalk Services Platform installation. See the substeps in step 4 on page 29.
- **FactoryTalk AssetCentre Server.** See “FactoryTalk AssetCentre server installer” on page 30.
- **FactoryTalk AssetCentre Setup Programs.** See “FactoryTalk AssetCentre Client Package installer” on page 32.
- **FactoryTalk AssetCentre Common Components.** See “FactoryTalk AssetCentre Common Components installer” on page 33.
- **FactoryTalk AssetCentre Calibration Management Server.** See “FactoryTalk AssetCentre Calibration Management Server installer” on page 34.
- **Launch Rockwell Windows Firewall Configuration Utility.** See “Using the Windows Firewall Configuration Utility” on page 34.

The following sections provide more information about installing these components.



Installing FactoryTalk Services Platform

See “Installing FactoryTalk AssetCentre server software” on page 27 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 instructions to install the platform. If FactoryTalk Services Platform 2.10.00 or 2.10.01 is already installed on your computer, go to step 4.
2. When you are asked whether you want to install the FactoryTalk Administration Console, be sure the check box 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 on to 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**.
5. 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.

FactoryTalk AssetCentre server installer

See “Installing FactoryTalk AssetCentre server software” on page 27 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.

To install the FactoryTalk AssetCentre server:

1. Follow the on-screen instructions.
2. 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 then click OK.
3. The **Database Installer** utility opens. This utility installs the FactoryTalk AssetCentre database. Specify 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 67.



- a. 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.	Leave the setting as it is (local).
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.

- b. 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.

- c. Click **Start**.

FactoryTalk AssetCentre installs the database.

4. The **Database User Configuration** utility opens. Create a database user for the FactoryTalk AssetCentre software to use to access the database.
- a. 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.
- b. After you click **OK**, the software asks if you want to create a new login for the database. Click **Yes**.
- c. After running the Database User Configuration utility, the software may ask you to log on to FactoryTalk. If so, log on using a FactoryTalk Administrator account.



you to install FactoryTalk AssetCentre clients and agents on a remote machine without the installation disc. Instead, you can install the software through Internet Explorer.

To install the Client Package:

1. Follow the on-screen instructions.

FactoryTalk AssetCentre Common Components installer

See “Installing FactoryTalk AssetCentre server software” on page 27 for the steps to get to this part of the installation.

To install the common components:

1. Follow the on-screen instructions.
2. When asked to restart your computer, click **Yes**. You must restart the computer before you run the FactoryTalk AssetCentre server.
3. 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 29 to make the appropriate choice.
3. Click **Continue** on the Check FactoryTalk Services Platform Configuration window.
4. The Client Package Installer window opens. You do not need to create the Client Package again; click **Cancel**.
5. Click **Start** on the Install FactoryTalk AssetCentre Server window.

FactoryTalk AssetCentre Calibration Management Server installer

See “Installing FactoryTalk AssetCentre server software” on page 27 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.

To install the Calibration Management server:

1. Follow the on-screen instructions.
2. After you install the FactoryTalk AssetCentre Calibration Management Server, the ProCalV5 Connection Installer window opens. This step installs the database connection for ProCalV5. Provide this 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 (as described on page 35).

3. Click **Finish**.

Using the Windows Firewall Configuration Utility

See “Installing FactoryTalk AssetCentre server software” on page 27 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 6 and “Additional ports you may have to open” on page 79 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 runs 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



indicates 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 6 and “Additional ports you may have to open” on page 79 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 are listed and the Accept button is 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.



FactoryTalk AssetCentre uses SQL Server authentication. Select SQL as the authentication method for the ProCalV5 database.

4. Run the ProCalV5 Data Source Edit Wizard, described next.

Running the ProCalV5 Data Source Edit Wizard

If you installed the ProCalV5 server AFTER you installed the FactoryTalk AssetCentre server, you must 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 need to know this 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.

To connect the ProCalV5 server to FactoryTalk AssetCentre:

1. Click **Start > All Programs > Rockwell Software > FactoryTalk AssetCentre Server > ProCalV5 Data Source Configuration**.
2. Follow the on-screen instructions.

5

Installing FactoryTalk AssetCentre clients

Once you have installed your FactoryTalk AssetCentre server, you can install FactoryTalk AssetCentre clients.

If installing on the Windows 2000 operating system: At certain points of the installation you will need to restore a window that has been minimized. Sometimes on Windows 2000 the taskbar is not visible after a reboot, and therefore the taskbar button for the installation window that needs to be restored is also not visible. If this happens, use Alt-tab to restore the window.

Where to install the FactoryTalk AssetCentre client

Install the client on any computer:

- from which you want to access the FactoryTalk AssetCentre client software (to edit the representation of your assets, to view logs, to create schedules, to search the logs, and so on).
- that is capable of running the client software (see “Client and agent computer requirements” on page 5).
- that is connected to the FactoryTalk AssetCentre server.

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

The Disaster Recovery capability provides the ability to schedule a comparison between master files and processor program and data files. 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.

If you have purchased the Calibration Management capability for FactoryTalk AssetCentre, you must also install the ProCalV5 client software on the FactoryTalk AssetCentre client computer. This step comes after you have installed the FactoryTalk AssetCentre client software. See page 45.

Optional upgrades with CPR 9 SR 1

FactoryTalk AssetCentre provides optional upgrades from CPR 9 to CPR 9 SR 1 for these software products used by FactoryTalk AssetCentre client:

- FactoryTalk Services Platform
- RSLinx Classic Lite
- RSLinx Enterprise

If you already have these products installed, you do not need to reinstall them. If you do not have these products installed, FactoryTalk AssetCentre will install the CPR 9 SR 1 version.

If you already have the CPR 9 version installed and you wish to upgrade to the CPR 9 SR 1 version, you must manually upgrade it from the installation disc, as described on page 1. We recommend that you perform the upgrade before you begin installing the FactoryTalk AssetCentre client.



If you want to use the CPR 9 SR 1 version of RSLinx Enterprise, you must also use the CPR 9 SR 1 version of FactoryTalk Services Platform.

If you already have the CPR 9 version of FactoryTalk AssetCentre client installed, it will be automatically upgraded to CPR 9 SR 1 in the steps that follow.

Installing FactoryTalk AssetCentre clients

The FactoryTalk AssetCentre client provides the user interface for FactoryTalk AssetCentre. It is through the client that you perform tasks such as checking files in and out, creating and running scheduled events, and viewing logs. For more information on what you can do with FactoryTalk AssetCentre client software, see the online help (once the client is installed).

Install the FactoryTalk AssetCentre client software on all computers on which you want to use FactoryTalk AssetCentre. The client is not required on the FactoryTalk AssetCentre server computer, but you can install it on the server if desired.

To install a FactoryTalk AssetCentre client:

1. Log on to the client computer as an administrator or as a user with administrative privileges.
2. On the client computer, open Internet Explorer.
3. In the **Address** field of Internet Explorer, type the following address:

`http://servername/rockwellsoftware/assetcentre`

where *servername* is the name of your FactoryTalk AssetCentre server computer.

For example, if your FactoryTalk AssetCentre server is called MYSERVER, type:

`http://MYSERVER/rockwellsoftware/assetcentre`

If you are using SSL, then begin with `https://` instead.

4. Press **Enter**.
5. Internet Explorer displays a page from the server that allows you to install the FactoryTalk AssetCentre client software.



6. Click **Install AssetCentre Client on this computer**.



If Internet Explorer displays an error message that it can't connect to the install web page, try bypassing the proxy for local addresses. Also make sure that IIS is running on the server. For information on running IIS see "Web page for installing the FactoryTalk AssetCentre client and agent cannot be displayed" on page 68.

If Internet Explorer displays a warning about possible unsafe content, try adding the FactoryTalk AssetCentre Web site (URL above) to your Trusted Sites.

See your Internet Explorer documentation for more information.

7. On the File Download - Security Warning window, click **Run** (or **Open**). Do not attempt to save the installation file—it will **not** run correctly from your local computer.
8. The Install FactoryTalk AssetCentre Client 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 check boxes 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 the copyright page at the beginning of this guide.

9. Click **Start**. Follow the on-screen instructions for the components that need to be installed.

If you are installing the client on the FactoryTalk AssetCentre server computer, the server computer will already have Windows Installer, Microsoft .NET Framework, FactoryTalk Services Platform, and FactoryTalk AssetCentre Common Components installed. The installation program automatically skips the existing components. Skip those sections in the instructions below.



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 on to your computer.

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

- **Windows Installer 3.1 v2.** If this component is not already installed on your computer, the setup program will install it. Follow the on-screen installation instructions. If you are prompted to reboot when the installation is complete, close Microsoft Internet Explorer and any FactoryTalk AssetCentre installation windows before rebooting.

- **Microsoft .NET Framework.** The FactoryTalk AssetCentre client 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. Follow the installation instructions on-screen to install them.

If a message appears asking to reboot the computer, select **No** and then click **Start** on the Install FactoryTalk AssetCentre Client window.

- **FactoryTalk Services Platform 2.10.00 (CPR 9) or 2.10.01 (CPR 9 SR 1).** See “Installing FactoryTalk Services Platform,” next.
- **Check and Configure FTSP.** This occurs during the FactoryTalk Services Platform installation. See the substeps on page 41.
- **FactoryTalk AssetCentre Common Components.** See “FactoryTalk AssetCentre Common Components installer” on page 42.
- **FactoryTalk AssetCentre Client host.**
- **FactoryTalk AssetCentre Calibration Management Client.** See “FactoryTalk AssetCentre Calibration Management client software installer” on page 42.
- **RSLinx Classic Lite 2.53.00 (CPR 9) or 2.54.00 (CPR 9 SR 1).** See “Installing RSLinx Classic Lite” on page 42.
- **RSLinx Enterprise 5.00.00 (CPR 9) or 5.17.00 (CPR 9 SR 1).** See “Installing RSLinx Enterprise” on page 43.
- **Launch Rockwell Windows Firewall Configuration Utility.** See “Using the Windows Firewall Configuration Utility” on page 44.

If installing on the server: Skip to step 4. The FactoryTalk Services Platform has already been installed, but the FactoryTalk Directory must be specified.

Installing FactoryTalk Services Platform

See “Installing FactoryTalk AssetCentre clients” on page 38 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. If FactoryTalk Services Platform 2.10.00 or 2.10.01 is already installed on your computer, go to step 4.
2. When you are asked whether you want to install the FactoryTalk Administration Console, be sure the check box 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 the 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. After the system checks the FactoryTalk Services Platform configuration, you will see a window with a stop sign on it. The purpose of this window is to set the location of the FactoryTalk Directory. If the computer on which you are installing the software is also the computer that will be the FactoryTalk Directory server, 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, click the browse button next to the **Computer hosting directory server** 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. Click **OK** on the message telling you to restart the computer. The software attempts a connection to the FactoryTalk Directory Server. You may be asked to log on to the new FactoryTalk Directory server. If you are, enter the username and password for the Network Directory server administrator on the FactoryTalk Directory Server (not the local FactoryTalk Network Directory), and then click **OK**.

5. 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 client installation.
6. Continue to follow the on-screen instructions.

If installing on the server:

Skip to the next section. The common components have already been installed.

FactoryTalk AssetCentre Common Components installer

See “Installing FactoryTalk AssetCentre clients” on page 38 for the steps to get to this part of the installation.

To install the common components:

1. Follow the on-screen instructions.
2. If you see messages indicating that the firewall has blocked a program, select **Unblock** on each message.

FactoryTalk AssetCentre Calibration Management client software installer

See “Installing FactoryTalk AssetCentre clients” on page 38 for the steps to get to this part of the installation.



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

After the FactoryTalk AssetCentre client is installed, the FactoryTalk AssetCentre Calibration Management client install begins.

1. On the Install FactoryTalk AssetCentre Calibration Management Client window, click **Next**.
2. Follow the on-screen instructions to install the FactoryTalk AssetCentre Calibration Management client.

When finished, there may be a short delay before you see the RSLinx Classic Lite installer start.

Installing RSLinx Classic Lite

See “Installing FactoryTalk AssetCentre clients” on page 38 for the steps to get to this part of the installation.

RSLinx Classic allows you to connect to Rockwell Automation control hardware. If RSLinx Classic is not installed on the client computer, the installation program for the

FactoryTalk AssetCentre client will install RSLinx Classic Lite. RSLinx Classic is required even if you have RSLinx Enterprise.

The version of RSLinx Classic installed is RSLinx Classic Lite, which is a version that does not support connections through OPC. For more information about RSLinx Classic, see the RSLinx Classic documentation.

If you have RSLinx Classic (version 2.53 or higher) installed on your computer, you do not need to install this component (and the FactoryTalk AssetCentre client installation program will not ask you to install it).

To install RSLinx Classic Lite:

1. Follow the on-screen instructions until you get to the Standard Setup page of the installation wizard.
2. The Standard Setup page allows you to select the components of the software you want to install and to change the folder where the software is installed. We advise that you install all of the components. Change the settings on this page as desired, and then click **Next**.
3. Continue following the on-screen instructions to complete the installation.
4. On the InstallShield Wizard Completed window, click **Finish**.
5. Click **Exit** on the RSLinx Classic installation menu.
6. Click **Continue** on the Install FactoryTalk AssetCentre Client window.

When finished, there may be a short delay before you see the RSLinx Enterprise installer start.

Installing RSLinx Enterprise

See *"Installing FactoryTalk AssetCentre clients"* on page 38 for the steps to get to this part of the installation.

RSLinx Enterprise is required for your FactoryTalk AssetCentre system to communicate with PanelView Plus operator interfaces. RSLinx Classic Lite is still required for the FactoryTalk AssetCentre client even if you install RSLinx Enterprise.

If you have RSLinx Enterprise (version 5.00.00 or higher) installed on your computer, you do not need to install this component (and the FactoryTalk AssetCentre client installation program will not ask you to install it).

1. Follow the on-screen instructions.
2. When prompted for a serial number, enter any 10-digit number, for example 1234567890.

3. In the Setup Type page of the installation wizard, select Standard Feature Set Installation, and then click **Next**.
4. Continue following the on-screen instructions to complete the installation.
5. On the InstallShield Wizard Completed window, click **Finish**.
6. Click **Exit** on the RSLinx Enterprise installation menu.
7. Click **Continue** on the Install FactoryTalk AssetCentre Client window.

Using the Windows Firewall Configuration Utility

See “Installing FactoryTalk AssetCentre clients” on page 38 for the steps to get to this part of the installation.

IF YOUR OPERATING SYSTEM IS WINDOWS XP SP 2 OR HIGHER OR WINDOWS SERVER 2003 SP 1 OR HIGHER

These operating systems support 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 6 and “Additional ports you may have to open” on page 79 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.



If you have a firewall other than Windows Firewall, use the information in “Network requirements” on page 6 and “Additional ports you may have to open” on page 79 to configure your firewall to allow communication through the appropriate ports and with specific processes.

Checking to see if the client is installed correctly

To check if the client is correctly installed and connected to the FactoryTalk AssetCentre server, start the client. Click **Start > All Programs > Rockwell Software > FactoryTalk AssetCentre Client > AssetCentre Client**.

When the client runs, it checks the server for the latest version of the client software and displays a message if the client software is not the latest version (“The client and server versions are incompatible”). To update the client software, follow the steps in “Installing FactoryTalk AssetCentre clients” on page 38.

For information on getting started with the software, see the online help.

Installing the ProCalV5 client software

If you have purchased the Calibration Management capability for FactoryTalk AssetCentre, you will also install the ProCalV5 client software on the FactoryTalk AssetCentre client computer. This step comes after you have installed the FactoryTalk AssetCentre client software.

To install the ProCalV5 client:

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.

6

Installing FactoryTalk AssetCentre agents

The Search feature, as well as purchased capabilities, such as the Disaster Recovery capability, require the use of *agents* to perform scheduled operations. Agents are programs that communicate with the FactoryTalk AssetCentre server and perform scheduled tasks on behalf of the FactoryTalk AssetCentre server. Agents allow work to be distributed and shared among multiple computers to spread processing load and speed up operations. When a server needs an agent to perform a task, it locates the computer running the operation and assigns the task to that agent. The agent then reports the task's completion to the server.

For FactoryTalk AssetCentre v. 2.21.01, only the Disaster Recovery capability and Search feature use agents.

These agents can be installed on the computer running the FactoryTalk AssetCentre server, on computers running the FactoryTalk AssetCentre client, or on any other computer that meets the system requirements and is connected to the FactoryTalk AssetCentre server. See “Client and agent computer requirements” on page 5 for agent computer requirements.

Where to install FactoryTalk AssetCentre agents

Agents can be installed on any computer that:

- is capable of running the agent software (see “Client and agent computer requirements” on page 5).
- is connected to the FactoryTalk AssetCentre server.

If you intend to perform a large number of Disaster Recovery operations, you can install the Disaster Recovery agent on up to five computers on your network to help spread out the processing load. Contact Rockwell Automation if you need to install the agent on more than five computers.

How do you know if you need more Disaster Recovery agents? If scheduled operations are taking longer than desired to complete, then install more Disaster Recovery agents.

If your system uses PanelView Plus operator interfaces, you must install RSLinx Classic, RSLinx Enterprise, and the FactoryTalk View ME software on every agent computer in the system. RSLinx Enterprise must be version 5.00.00 or higher. FactoryTalk View ME is a separate installation, and is not included in the FactoryTalk AssetCentre installation.

Also, for Disaster Recovery functions, the agent computer **MUST** have the appropriate RSLogix programming software for your devices.

Optional upgrades with CPR 9 SR 1

FactoryTalk AssetCentre provides optional upgrades from CPR 9 to CPR 9 SR 1 for these software products used by FactoryTalk AssetCentre agents:

- FactoryTalk Services Platform
- RSLinx Classic Lite
- RSLinx Enterprise

If you already have these products installed, you do not need to reinstall them. If you do not have these products installed, FactoryTalk AssetCentre will install the CPR 9 SR 1 version.

If you already have the CPR 9 version installed and you wish to upgrade to the CPR 9 SR 1 version, you must manually upgrade it from the installation disc, as described on page 1. We recommend that you perform the upgrade before you begin installing the FactoryTalk AssetCentre Disaster Recovery agent.



If you want to use the CPR 9 SR 1 version of RSLinx Enterprise, you must also use the CPR 9 SR 1 version of FactoryTalk Services Platform.

If you already have the CPR 9 version of FactoryTalk AssetCentre Disaster Recovery agent installed, it will be automatically upgraded to CPR 9 SR 1 in the steps that follow.

Installing the FactoryTalk AssetCentre Disaster Recovery agent



You must have the appropriate RSLogix programming software for your devices installed on the agent computer to run Disaster Recovery schedules.

To install the FactoryTalk AssetCentre Disaster Recovery agent:

1. Log on to the agent computer as an administrator or as a user with administrative privileges.
2. On the agent computer, open Internet Explorer.
3. In the **Address** field of Internet Explorer, type the following address:

http://servername/rockwellsoftware/assetcentre

where *servername* is the name of your FactoryTalk AssetCentre server computer.

For example, if your FactoryTalk AssetCentre server is called MYSERVER, type:

http://MYSERVER/rockwellsoftware/assetcentre

If you are using SSL, then begin with https:// instead.

4. Press **Enter**.



5. Internet Explorer displays a page from the server that allows you to install the FactoryTalk AssetCentre agent software.

Click **Install AssetCentre Agents on this computer**.



If Internet Explorer displays an error message that it can't connect to the install web page, try bypassing the proxy for local addresses. Also make sure that IIS is running on the server. For information on running IIS see "Web page for installing the FactoryTalk AssetCentre client and agent cannot be displayed" on page 68.

If Internet Explorer displays a warning about possible unsafe content, try adding the FactoryTalk AssetCentre Web site (URL above) to your Trusted Sites.

See your Internet Explorer documentation for more information.

6. On the File Download - Security Warning window, click **Run** (or **Open**). Do not attempt to save the installation file—it will **not** run correctly from your local computer.
7. The Install FactoryTalk AssetCentre Agents window opens. The installer searches the computer for required components and displays the results in this window. The installer will not 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 the copyright page at the beginning of this guide.

8. Click **Start**. Follow the on-screen 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 on to your computer.

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

- **Windows Installer 3.1 v2.** If this component is not already installed on your computer, the setup program will install it. Follow the on-screen installation instructions. If you are prompted to reboot when the installation is complete, close Microsoft Internet Explorer and any FactoryTalk AssetCentre installation windows before rebooting.
- **Microsoft .NET Framework.** The Disaster Recovery agent requires that Microsoft .NET Framework versions 1.1 (with Service Pack 1) and 2.0 be installed on the agent

computer. If these components are not already installed, the setup program will install them. Follow the installation instructions on-screen to install them.

- **FactoryTalk Services Platform 2.10.00 (CPR 9) or 2.10.01 (CPR 9 SR 1).** See “Installing FactoryTalk Services Platform” on page 50.
- **Check and Configure FTSP.** This occurs during the FactoryTalk Services Platform installation. See the substeps in step 4 on page 51.
- **RSLinx Classic Lite 2.53.00 (CPR 9) or 2.54.00 (CPR 9 SR 1).** See “Installing RSLinx Classic Lite” on page 52.
- **FactoryTalk AssetCentre Common Components.** See “FactoryTalk AssetCentre Common Components installer” on page 53.
- **FactoryTalk AssetCentre RA Disaster Recovery Agent.** See “FactoryTalk AssetCentre Disaster Recovery agent installer” on page 53
- **FactoryTalk AssetCentre Agent Host.** See “FactoryTalk AssetCentre Agent Host installer” on page 53.
- **RSLogix 5000 Compare v3.** See “RSLogix 5000 Compare installer” on page 53.
- **RSLinx Enterprise 5.00.00 (CPR 9) or 5.17.00 (CPR 9 SR 1).** See “Installing RSLinx Enterprise” on page 54.
- **Launch Rockwell Windows Firewall Configuration Utility.** See “Using the Windows Firewall Configuration Utility” on page 55.

If the computer already has the FactoryTalk AssetCentre server or client installed on it, then the computer will already have everything installed except the FactoryTalk AssetCentre Disaster Recovery agent, the FactoryTalk AssetCentre Agent Host, and RSLogix 5000 Compare. The installation program automatically skips the existing components. Skip those sections in the instructions below.

If installing on the server or a client:
Skip to step 4. The FactoryTalk Services Platform has already been installed, but the FactoryTalk Directory must be specified.

Installing FactoryTalk Services Platform

See “Installing the FactoryTalk AssetCentre Disaster Recovery agent” on page 48 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 the agent 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. If FactoryTalk Services Platform 2.10.00 or 2.10.01 is already installed on your computer, go to step 4.
2. When you are asked whether you want to install the FactoryTalk Administration Console, be sure the check box 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 the 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. After the system checks the FactoryTalk Services Platform configuration, you will see a window with a stop sign on it. The purpose of this window is to set the location of the FactoryTalk Directory. If the computer on which you are installing the software is also the computer that will be the FactoryTalk Directory server, 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, click the browse button next to the **Computer hosting directory server** 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. Click **OK** on the message telling you to restart the computer. The software attempts a connection to the FactoryTalk Directory Server. You may be asked to

log on to the new FactoryTalk Directory Server. If you are, enter the username and password for the Network Directory server administrator on the FactoryTalk Directory Server (not the local FactoryTalk Network Directory), and then click **OK**.

5. 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 Disaster Recovery agent installation. There may be a delay before you see the next installer start.

If installing on a client:

Skip to "FactoryTalk AssetCentre Disaster Recovery agent installer" on page 53. RSLinx Classic Lite, RSLinx Enterprise, and the common components have already been installed.

Installing RSLinx Classic Lite

See "Installing the FactoryTalk AssetCentre Disaster Recovery agent" on page 48 for the steps to get to this part of the installation.

RSLinx Classic allows you to connect to Rockwell Automation control hardware. If RSLinx Classic is not installed on the agent computer, the installation program for the FactoryTalk AssetCentre agents will install RSLinx Classic Lite. RSLinx Classic is required even if you have RSLinx Enterprise.

The version of RSLinx Classic installed is RSLinx Classic Lite, which is a version that does not support connections through OPC. For more information about RSLinx Classic, see the RSLinx Classic documentation.

If you have RSLinx Classic (version 2.53 or later) installed on your computer, you do not need to install this component (and the FactoryTalk AssetCentre Agents installation program will not ask you to install it).

1. Follow the on-screen instructions until you get to the Standard Setup page of the installation wizard.
2. The Standard Setup page allows you to select the components of the software you want to install and to change the folder where the software is installed. We advise that you install all of the components. Change the settings on this page as desired, and then click **Next**.
3. Continue following the on-screen instructions to complete the installation.
4. On the InstallShield Wizard Completed screen, click **Finish**.
5. Click **Continue** on the Install FactoryTalk AssetCentre Agent window.



FactoryTalk AssetCentre Common Components installer

If installing on the server:
Skip to the next section. The common components have already been installed.

See “Installing the FactoryTalk AssetCentre Disaster Recovery agent” on page 48 for the steps to get to this part of the installation.

To install the common components:

1. Follow the on-screen instructions.
2. If you are using Windows Firewall, you may see messages indicating that Windows Firewall has blocked a Rockwell Automation program. Choose the option to unblock these programs.

FactoryTalk AssetCentre Disaster Recovery agent installer

See “Installing the FactoryTalk AssetCentre Disaster Recovery agent” on page 48 for the steps to get to this part of the installation.

The FactoryTalk AssetCentre Disaster Recovery agent is the component that performs disaster recovery operations (backup operations and backup and compare operations).

To install the FactoryTalk AssetCentre Disaster Recovery agent.

1. Follow the on-screen instructions.

FactoryTalk AssetCentre Agent Host installer

See “Installing the FactoryTalk AssetCentre Disaster Recovery agent” on page 48 for the steps to get to this part of the installation.

The FactoryTalk AssetCentre Agent Host handles agent requests from the FactoryTalk AssetCentre server.

After the Disaster Recovery agent installation is complete, the installation for the FactoryTalk AssetCentre Agent Host begins.

To install the agent host:

1. Follow the on-screen instructions.

RSLogix 5000 Compare installer

See “Installing the FactoryTalk AssetCentre Disaster Recovery agent” on page 48 for the steps to get to this part of the installation.

To be able to perform compares between RSLogix 5000 projects, the Disaster Recovery agent uses version 3.0 or later of the RSLogix 5000 Compare utility.

To install the RSLogix 5000 Compare utility:

1. Follow the on-screen instructions.
2. If you have RSLogix 5000 software installed on the computer on which you are installing the FactoryTalk AssetCentre agents, you can add a Compare option to the RSLogix 5000 Tools menu. (This requires version 13 or later of RSLogix 5000.) To do this, select the **Add Compare Tool to RSLogix 5000 Tools menu** check box. Click **Next**.
3. On the Select Installation Folder screen, you can choose where the compare utility is installed. By default, the utility is installed in the C:\Program Files\Rockwell Software\RSLogix 5000 Compare v2 folder (the folder name was not updated to v3 for this release). You can change this folder by typing a new path in the Folder field, or by clicking the Browse button.



The Select Installation Folder screen also asks whether you want to install the compare utility for yourself or for everyone who uses the computer. Select **Everyone**. This is very important to the proper functioning of the agent.

4. Click **Next**.
5. Continue to follow the on-screen instructions.

Installing RSLinx Enterprise

See “Installing the FactoryTalk AssetCentre Disaster Recovery agent” on page 48 for the steps to get to this part of the installation.

RSLinx Enterprise is required for your FactoryTalk AssetCentre system to communicate with PanelView Plus operator interfaces. Note that RSLinx Classic Lite is still required for the FactoryTalk AssetCentre agent even if you install RSLinx Enterprise.

If you have RSLinx Enterprise (version 5.00.00 or higher) installed on your computer, you do not need to install this component (and the FactoryTalk AssetCentre agent installation program will not ask you to install it).

1. Follow the on-screen instructions.
2. When prompted for a serial number, enter any 10-digit number, for example 1234567890.
3. In the Setup Type page of the installation wizard, select Standard Feature Set Installation, and then click **Next**.
4. Continue following the on-screen instructions to complete the installation.



5. On the InstallShield Wizard Completed screen, click **Finish**.
6. Click **Exit** on the RSLinx Enterprise installation menu.
7. Click **Continue** on the Install FactoryTalk AssetCentre Agent window.

Using the Windows Firewall Configuration Utility

See “Installing the FactoryTalk AssetCentre Disaster Recovery agent” on page 48 for the steps to get to this part of the installation.

IF YOUR OPERATING SYSTEM IS WINDOWS XP SP 2 OR HIGHER OR WINDOWS SERVER 2003 SP 1 OR HIGHER

These operating systems support 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 agent installation is complete.

If you are using a firewall other than Windows Firewall, use the information in “Network requirements” on page 6 and “Additional ports you may have to open” on page 79 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.

If you have a firewall other than Windows Firewall, use the information in “Network requirements” on page 6 and “Additional ports you may have to open” on page 79 to configure your firewall to allow communication through the appropriate ports and with specific processes.

Configuring for security-enabled RSLogix programming software

If FactoryTalk Security is enabled in your RSLogix programming software (RSLogix 5, RSLogix 500, or RSLogix 5000), you must configure the Disaster Recovery agent and FactoryTalk Security to grant the necessary permissions for Disaster Recovery operations.



Scheduled events for Rockwell Automation processors (Logix5000, MicroLogix, SLC 500, and PLC-5 processors) will fail if FactoryTalk Security is enabled for that device's programming software (RSLogix 5000 versions 16 and earlier, RSLogix 500, or RSLogix 5). The problem is fixed in RSLogix 5000 versions higher than 16 and a software patch is provided to fix the problem for RSLogix 500 and RSLogix 5. The patched version of RSLogix 500 is 8.10.00 and the patched version of RSLogix 5 is 8.00.05.01. For information about installing the patch, see the *FactoryTalk AssetCentre Release Notes*, located on the FactoryTalk AssetCentre Installation CD and on the Start menu in the FactoryTalk AssetCentre Server group. This issue does not affect other devices' schedules (such as robots or PanelView devices). If a schedule contains both Rockwell Automation processors and other devices, the scheduled event will only fail for those Rockwell Automation processors for which FactoryTalk Security is enabled in the programming software; the event will complete for the other devices.

These instructions assume that the FactoryTalk AssetCentre agent software has been installed and that all RSLogix software programs that will be used in the system are also installed on each agent computer.

If operating in a Windows domain

1. Create a domain account for the Verification Agent service to run as. (The Verification Agent service is for the Disaster Recovery agent.) This is generally performed by someone in your Information Technology department. This account must be used exclusively for the service, not by users.
2. On each agent computer:
 - Add the new domain account to the Administrator user group in Windows.
 - Configure the Verification Agent service to run as the new domain account created above. To do so, open the Services utility in Microsoft Windows. Find the Verification Agent service and edit its properties to log on as the account created above.
3. On any computer in the system, open the FactoryTalk Administration Console (logging on to the Network directory using a FactoryTalk Administrator account) and add the new domain account as a new Windows-linked user.
4. Grant this user read access to the FactoryTalk Directory. To do so, right-click the Network node at the top of the tree, and then select **Security**. On the **Permissions** tab, select the domain account and then expand the **Common** permissions group. Make sure the **Read** permission is set to **Allow**.



5. Set permissions for RSLogix software (depending on what type of processors you are using). Under **System** in the Explorer pane, right-click **Networks and Devices** and select **Security**. On the **Permissions** tab, select the new domain user. (If the user account you just created doesn't appear in the list of users, add it.) Expand the permissions group for the appropriate RSLogix software and set the following permissions to **Allow**:
 - For RSLogix 5 grant Offline Program File Monitoring, Save, and Upload.
 - For RSLogix 500 grant Offline Program File Monitoring, Save, and Upload.
 - For RSLogix 5000 grant Project: Export, Project: Go Online, Project: Open, Project: Save, and Project: Upload.
6. Configure FactoryTalk Security to use single sign-on. Still in the FactoryTalk Administration Console, navigate to **System > Policies > System Policies** in the Explorer pane. Double-click **Security Policy**. Set the **Use single sign-on** policy to **Enabled**.

If operating in a Windows workgroup

Perform these steps on each agent computer in the system. These steps show you how to create a new Windows user account and a new FactoryTalk user account for each agent computer.

1. Install all RSLogix software programs that will be used in the system if you have not already done so.
2. On the agent computer, use the Computer Management utility in Microsoft Windows to create a Windows user account that can be used to authenticate with FactoryTalk Security.
3. Add the new Windows user account to the local Administrators group.
4. Configure the Verification Agent service to run as the new Windows user account you created above. To do so, open the Services utility in Microsoft Windows. Find the Verification Agent service and edit its properties to log on as the account created above.
5. Open the FactoryTalk Administration Console and add the new Windows user account created above as a new Windows-linked user.

Perform these steps on any computer connected to the FactoryTalk Network Directory. These steps need only be performed once and will be in effect for the entire FactoryTalk Network Directory.

1. In the FactoryTalk Administration Console, create a new user group called "Local Agent Users." Add each of the new FactoryTalk users created in step 5 above to the

- Local Agent Users group. This will facilitate making security settings because you will be able to set them once for the whole group, rather than for each user.
2. Grant the Local Agent Users group read access to the FactoryTalk Directory. To do so, right-click the **Network** node at the top of the tree, and then select **Security**. On the **Permissions** tab, select the **Local Agent Users** group and then expand the **Common** permissions group. Make sure the **Read** permission is set to **Allow**.
 3. Set permissions for RSLogix software (depending on what type of processors you are using). Under **System** in the Explorer pane, right-click **Networks and Devices** and select **Security**. If the Local Agent Users group doesn't appear in the list, add it. On the **Permissions** tab, select the **Local Agent Users** group. Expand the permissions group for the appropriate RSLogix software and set the following permissions to **Allow**:
 - For RSLogix 5 grant Offline Program File Monitoring, Save, and Upload.
 - For RSLogix 500 grant Offline Program File Monitoring, Save, and Upload.
 - For RSLogix 5000 grant Project: Export, Project: Go Online, Project: Open, Project: Save, and Project: Upload.
 4. Configure FactoryTalk Security to use single sign-on. Still in the FactoryTalk Administration Console, navigate to **System > Policies > System Policies** in the Explorer pane. Double-click **Security Policy**. Set the **Use single sign-on** policy to **Enabled**.

Checking to see if the agent software is current

Unlike the FactoryTalk AssetCentre client, the FactoryTalk AssetCentre agent does not display a message if the agent does not have the latest version of the software. Instead, the agent does not start, and logs a message in the System Event log and the AssetCentre Event log.

To check if the FactoryTalk AssetCentre software on the agent is up to date, start a FactoryTalk AssetCentre client. The client does not have to be on the same computer as the agent. Click **Start > All Programs > Rockwell Software > FactoryTalk AssetCentre Client > AssetCentre Client**. The number of running agents is displayed in the status bar of the client. If one or more agents are not running, and the client software has been recently updated, then the agent software may need to be updated as well.

To update the agent software, follow the steps in “Installing the FactoryTalk AssetCentre Disaster Recovery agent” on page 48. After you start the Install FactoryTalk AssetCentre Agent program from the FactoryTalk AssetCentre server website, the installer searches the computer for components that need to be updated, and displays the results in this



window. Components that will be updated are indicated with a computer icon and a checked box.

7

Configuring FactoryTalk AssetCentre

Configuring for client access to the server

For clients to be able to access the FactoryTalk AssetCentre server, the FactoryTalk Directory and FactoryTalk Security must be configured to give clients access. To configure access, you will need to use the FactoryTalk Administration Console.

The FactoryTalk Directory uses two factors to determine who should have access to any given function:

- **The user's account**, which can either be a FactoryTalk Directory account or a Windows domain account. This identifies the user.
- **The computer from which the user is accessing the FactoryTalk Directory**. This allows you to limit which computers can access the directory, and also allows you to determine whether certain functions can or cannot be performed from a given computer. For example, you can configure the FactoryTalk Directory to give access to a user from her or his own computer but not from another computer.

At a minimum, you must add the FactoryTalk AssetCentre users and their computers to the FactoryTalk Directory, and you must configure access privileges for FactoryTalk AssetCentre in the FactoryTalk Directory.

Adding users to the FactoryTalk Directory

A user must have a FactoryTalk Directory user account in order to use FactoryTalk AssetCentre.




This section contains only basic instructions for using the FactoryTalk Directory and FactoryTalk Security. For background information and information regarding more advanced procedures, please see the online help for the FactoryTalk Administration Console.

By default, all members of the Administrators group on the computers on which you installed the FactoryTalk Services Platform were added to the Administrators group in the FactoryTalk Directory. Also, any rights that you assign to a Windows User Group are assigned to all members of that group.

To add a user to the FactoryTalk Directory:

1. Start the FactoryTalk Administration Console (click **Start > All Programs > Rockwell Software > FactoryTalk Administration Console**).
2. Log on to the Network directory using a FactoryTalk Administrator account.

3. Open the **Users and Groups** folder.
 4. Under the Users and Groups folder, right-click the **Users** folder, and then select **New**.
 5. Specify whether you want to create a new *User* or a *Windows-Linked User*. User accounts are visible only to the FactoryTalk system and their access is independent of Windows. A Windows-linked user is validated by Windows. See the FactoryTalk help topic “Choosing between FactoryTalk Security accounts and Windows-linked accounts” for more information. (A FactoryTalk Security account is the same as a *User* account.) To find this help topic, open the FactoryTalk Administration Console. Select **Help > Contents**. On the **Index** tab, look up “user accounts” and double-click **choosing FactoryTalk or Windows-linked**.
 - If you may need to use FactoryTalk AssetCentre while disconnected from the network, use FactoryTalk Security user accounts. Windows-linked user accounts will not be able to authenticate with the domain while disconnected.
 - If you choose to use Windows-linked users, consider using Windows-linked *group* accounts rather than Windows-linked user accounts if possible. This simplifies the process if you ever move your software to a different domain. You cannot move individual Windows-linked user accounts from one domain to another. You can move Windows-linked group accounts to a new domain, while retaining all of the security permissions for the group. If you change the domain an individual Windows-linked user account belongs to, you must delete the old account, create the new account, and then recreate all of the security permissions for the new account.
-  If you have users who need similar access to features of FactoryTalk AssetCentre, consider grouping users to make assigning security privileges easier. For example, you can group all of your electricians into an “Electricians” group, and then provide security access for them as a group. For information about grouping users, see the online help for the FactoryTalk Administration Console.
6. Enter the information for the user.

Adding computers to the FactoryTalk Directory

When the FactoryTalk Services Platform is installed on a computer, that computer is automatically added to the FactoryTalk Network Directory. Because the FactoryTalk Services Platform is included in the FactoryTalk AssetCentre installation, your client computers should already be in the FactoryTalk Network Directory.



For a user to be able to use FactoryTalk AssetCentre, the user's computer must be in the FactoryTalk Directory. For instructions on how to add a computer, refer to the FactoryTalk Help in the FactoryTalk Administration Console.



If you have a significant number of computers for which you need to permit or restrict access, consider grouping them to make assigning security privileges easier. For example, you can group all of the computers used in offices away from the plant floor and restrict access to features that should be used only from computers stationed where the user can see the automation system directly. For information about grouping computers, see the online help for the FactoryTalk Administration Console.

Configuring feature security for FactoryTalk AssetCentre users

By default, all users and the Administrators group in FactoryTalk Directory can perform any task in the FactoryTalk AssetCentre software. To deny specific users the right to perform tasks in FactoryTalk AssetCentre, you must edit the Feature Security settings in the FactoryTalk Administration Console.



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 All Users or Administrators could lock everyone out of the system and would deny rights in all FactoryTalk-enabled products using FactoryTalk version 2.10.00 (CPR 9) or version 2.10.11 (CPR 9 SR 1).

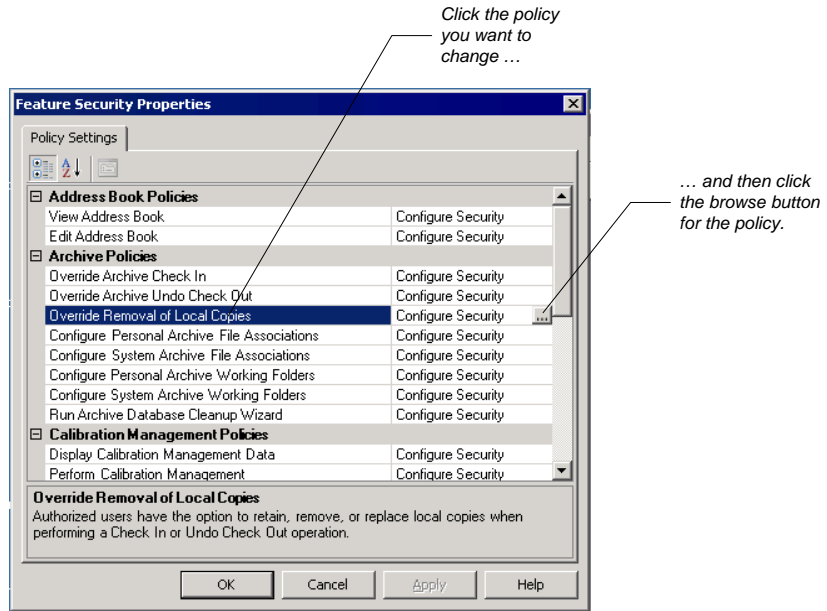
To change which users can perform tasks in FactoryTalk AssetCentre:

1. Start the FactoryTalk Administration Console (click **Start > All Programs > Rockwell Software > FactoryTalk Administration Console**).
2. Log on to the Network directory using a FactoryTalk Administrator account.
3. In the Explorer pane of the FactoryTalk Administration Console, navigate to **System > Policies > Product Policies > FactoryTalk AssetCentre**.
4. Double-click **Feature Security**.



There is also a Server Settings object in the FactoryTalk AssetCentre folder. Do NOT attempt to change any of the settings in this object. Doing so may render your FactoryTalk AssetCentre system inoperative. If you need to change server settings (to use a different mail server, for example), click **Start > All Programs > Rockwell Software > FactoryTalk AssetCentre Server > Server Settings**.

- In the Feature Security Properties window, click the policy you want to change, and then click the browse button for the policy. See the table after step 8 for a description of each policy.



- In the Configure Securable Action dialog box, select the user or group for whom you want to assign permissions. (If the user or group does not appear in the list, click **Add**, click **Show all**, select the user or group, and then click OK.)
- Click the appropriate box to allow or deny the user permission to the selected feature.
- Click OK.

This Policy Setting	Controls whether users can
View Address Book	View the Address Book (which contains addresses for the purpose of sending automatic e-mail notifications).
Edit Address Book	Edit or add contacts and groups in the Address Book (which contains addresses for the purpose of sending automatic e-mail notifications).
Override Archive Check In	Check in a file regardless of who checked it out or from where it was checked out.
Override Archive Undo Check Out	Undo a check out even if a different user checked the file out.



This Policy Setting	Controls whether users can
Override Removal of Local Copies	Choose to keep local copies of checked-in files on their computer. If this right is allowed, the user can keep local copies. If this right is denied, the user is not given this option.
Configure Personal Archive File Associations	Configure which software product launches when opening a particular type of file. If a personal file association is set, it will take precedence over the system file association.
Configure System Archive File Associations	Configure which software product launches when opening a particular type of file. This setting applies unless the user has specified a personal file association.
Configure Personal Archive Working Folders	Set a personal working folder for checking out files. For more information on working folders and personal working folders see the FactoryTalk AssetCentre client online help.
Configure System Archive Working Folders	Set the system working folder to which all users check out files unless they have a personal working folder. For more information on working folders and system working folders see the FactoryTalk AssetCentre client online help.
Run Archive Database Cleanup Wizard	Run the Archive Database Cleanup Wizard to delete unused versions of files.
Display Calibration Management Data	View Calibration Management data in FactoryTalk AssetCentre.
Perform Calibration Management	Perform Calibration Management tasks in ProCalV5 software.
Administer Calibration Users	Administer users, groups, and permissions in ProCalV5 software. Note that this policy only determines if the user is automatically added to the Administrator group in the ProCalV5 software. Once the user is added to ProCalV5, changing this policy for an AssetCentre user does not change the user's ProCalV5 security permissions.
Switch to Design mode	Enter Design mode, in which the user can edit the asset tree.
View Event Log	Display the Event Log and run a search on the Event Log.
View Audit Log	Display the Audit Log and run a search on the Audit Log.
View Diagnostics and Health Log	Display the Diagnostics and Health Log and run a search on the Diagnostics and Health Log.
Change Diagnostics and Health Log Message	Change the status of or add a comment to a Diagnostics and Health Log record.
View Diagnostics and Health Log Status	View the status history for a Diagnostics and Health Log record.

This Policy Setting	Controls whether users can
Create a new schedule	Create a new schedule (backup or backup and compare).
Edit a schedule	Change existing schedules.
Delete a schedule	Delete schedules.
View a schedule	View the Schedules tab, which displays a list of existing schedules and their status.
Command a schedule	Issue commands to a schedule, such as making the schedule active or running the schedule immediately.
Create a Search	Set up a new search to find entries matching specified criteria in one of the logs, in the Archive History, or in Archive Check Out Status information.

For more information on these policy settings or the features to which they refer, see the FactoryTalk AssetCentre client online help.

8

Troubleshooting FactoryTalk AssetCentre installation

General installation

A red x appears next to an item to be installed

The initial window in each installation (server, client, and agent) displays a list of all necessary components, whether they were found on the computer, and whether they will be installed. A red x is displayed next to a component if the installer could not determine whether the correct version already exists on that computer.

Contact Technical Support using the contact information provided on the copyright page at the beginning of this guide.

A “Program Maintenance” window appears while installing

This indicates that the component of the software you are installing is already installed. You do not need to install it again. If you suspect your installation is damaged, you can choose to repair the installation.

Server installation

SQL collation error encountered during database installation

The SQL Server collation must be case-insensitive for use with FactoryTalk AssetCentre software. If your SQL Server collation is case-sensitive, the FactoryTalk AssetCentre database installation will fail. Follow the directions here if your SQL Server collation is case-sensitive.

- 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.
 - Or:** Rebuild the master database using a 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 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 the Microsoft MSDN site for SQL Server 2005 collation settings.

Unable to log on to SQL Server during server installation

The logon during the installation process requires the use of the SQL Server sa (system administrator) account. If you configured your SQL Server to use mixed (both SQL Server and Windows domain) authentication, the sa account is available. Use the password you created for the sa account when the installation program prompts you for it. If your SQL Server installation is not configured for mixed authentication, you will need to change the authentication method. See the documentation for SQL Server for more information.

If you have forgotten your sa account password, you will need to change it. See the Microsoft SQL Server documentation for more information.

Client and agent installation

Web page for installing the FactoryTalk AssetCentre client and agent cannot be displayed

- Make sure the FactoryTalk AssetCentre server computer is running. In the Windows Services utility, make sure that the FactoryTalk AssetCentre Server service is running.
- Make sure you have access to your local area network.
- Make sure IIS is running on the server computer. For instructions, see the gray box, next.
- Try logging on to the server computer from the client. On the client computer, click **Start**, then select **Run**. In the Open field type two backslashes and then the server name (for example, \\ourserver). Click **OK**. You will be asked to log in to the server.
- If you are using a firewall, make sure File and Printer Sharing is permitted through the firewall. Port 80 (or whatever port used for HTTP on the server machine) also needs to be permitted.



TO MAKE SURE IIS IS RUNNING ON THE SERVER COMPUTER

- a. **For Windows Server 2003:** Click **Start**. On the Start menu, right-click the **My Computer** icon, and then click **Manage**. This starts the Computer Management console.

For Windows 2000 Server: On the Windows Desktop, right-click the **My Computer** icon, and then click **Manage**. This starts the Computer Management console.

- b. In the Computer Management console, open **Services and Applications**.
- c. Click **Internet Information Services**. The right pane lists the Internet services running under IIS. Open the **Web Sites** folder, and make sure the correct web site for IIS is “Running.” This is generally the “Default Web Site,” however, if you have created a different web site for IIS (see page 18) be sure to select that web site instead. If the web site is not running, continue to step d.
- d. To start the service, right-click the **Default Web Sites** icon, and then select **Start**.

“Error reading Primary Server Name from FactoryTalk Directory” during client installation

This error occurs when the computer on which you are installing the client is not using the same FactoryTalk Directory as the computer running the FactoryTalk AssetCentre server, or there was an error in the FactoryTalk Services Platform.

1. On the FactoryTalk AssetCentre server computer, set the FactoryTalk Directory location. Click **Start > All Programs > Rockwell Software > FactoryTalk Tools > Specify FactoryTalk Directory Location**.
2. Log in if prompted to do so, and then specify the location of the FactoryTalk Directory.
3. Close any clients that are connected to the server.
4. Restart the FactoryTalk Directory Server.



“At least one service or driver failed during system startup. Use Event Viewer to examine the event log for details” appears when attempting to start the client

This message may appear when launching RSLinx Classic on a system that has both RSLinx Classic and RSLinx Enterprise installed. The System Event log contains the message, “The A-B Virtual Backplane service failed to start due to the following error: The system cannot find the file specified.”

In some cases, the Virtual Backplane driver does not get installed correctly. For more information see the Rockwell Automation Knowledgebase article 34128 (<http://www.rockwellautomation.com/knowledgebase/>).

“Error initializing FactoryTalk AssetCentre. Could not load file or assembly... CalibrationPlugin.dll” appears when attempting to start the client

This message is displayed when you start the FactoryTalk AssetCentre client if the FactoryTalk AssetCentre Calibration Management client was not installed in the same directory as the FactoryTalk AssetCentre client. To fix this problem, you must uninstall and then reinstall the FactoryTalk AssetCentre client, making sure to install the FactoryTalk AssetCentre Calibration Management client in the same directory as the FactoryTalk AssetCentre client.

Other errors starting the client

If the client won't start or you see other error messages not specifically mentioned above, try the following:

- Make sure the client computer is connected to the network and the network is operational.
- Make sure the FactoryTalk AssetCentre server computer is running.
- Make sure the FactoryTalk AssetCentre Server service, IIS, and SQL server are all running on the server computer (and the database computer if separate). To check IIS, see the gray box “To make sure IIS is running on the server computer” on page 69.
- Make sure the correct FactoryTalk Directory is specified. On the machine running the client, select **Start > All Programs > Rockwell Software > FactoryTalk Tools > Specify FactoryTalk Directory Location**.
- If you are running in an environment without a domain controller (in a workgroup), you may need to turn off the single sign-on feature of FactoryTalk. See the FactoryTalk Help for more information.

- Make sure the server location setting is correct. On the server computer, click **Start > All Programs > Rockwell Software > FactoryTalk AssetCentre Server > Server Settings**. The server location must be set in this utility, NOT in the FactoryTalk Administration Console.
- Make sure the SQL Connection is set properly. On the server computer, click **Start > All Programs > Rockwell Software > FactoryTalk AssetCentre Server > Data Source Configuration**.
- If you are using a firewall, make sure your firewall is configured properly to permit access to the FactoryTalk AssetCentre Server. See “Network requirements” on page 6 and “Additional ports you may have to open” on page 79.

Starting the agent

If the FactoryTalk AssetCentre software installed on the server has been updated, the agent will not start until the software on the agent is updated. See “Checking to see if the agent software is current” on page 58.

Using Calibration Management

“No ProCalV5 Server connection information exists on the FactoryTalk AssetCentre server” appears when attempting to use Calibration Management features

This error message is displayed when you attempt to use the Calibration Management capability, but have not installed the FactoryTalk AssetCentre Calibration Management server. See “Installing the ProCalV5 server software after the FactoryTalk AssetCentre server” on page 35.

This error message is also displayed if you have installed the FactoryTalk AssetCentre Calibration Management server, but have not run the ProCalV5 Data Source Edit Wizard. See “Running the ProCalV5 Data Source Edit Wizard” on page 36.

“Error executing ProCalV5 commands, check ProCalV5 installation” appears when attempting to use Calibration Management features

This error message is displayed when you attempt to use the Calibration Management capability, but have not installed the FactoryTalk AssetCentre Calibration Management client. See “FactoryTalk AssetCentre Calibration Management client software installer” on page 42.



“Error initializing FactoryTalk AssetCentre. Could not load file or assembly... CalibrationPlugin.dll” appears when attempting to start the client

This message is displayed when you start the FactoryTalk AssetCentre client if the FactoryTalk AssetCentre Calibration Management client was not installed in the same directory as the FactoryTalk AssetCentre client. To fix this problem, you must uninstall and then reinstall the FactoryTalk AssetCentre client, making sure to install the FactoryTalk AssetCentre Calibration Management client in the same directory as the FactoryTalk AssetCentre client. See “Installing FactoryTalk AssetCentre clients” on page 37.

Unable to run the ProCalV5 Data Source Edit Wizard

If the ProCalV5 Data Source Edit Wizard displays an error when you run it (by clicking **Start > Programs > Rockwell Software > FactoryTalk AssetCentre Server > ProCalV5 Data Source Configuration**), the cause may be that the FactoryTalk AssetCentre Calibration Management server was not installed in the same directory as the FactoryTalk AssetCentre server. To fix this problem, you must uninstall and then reinstall the FactoryTalk AssetCentre server, making sure to install the FactoryTalk AssetCentre Calibration Management server in the same directory as the FactoryTalk AssetCentre server.



Installing Microsoft SQL Server 2000

FactoryTalk AssetCentre can use Microsoft SQL Server 2000 (either Enterprise Edition or Standard Edition) rather than the recommended Microsoft SQL Server 2005. Follow these instructions to install SQL Server 2000.

Installing Microsoft SQL Server 2000



After you install Microsoft SQL Server 2000, you **must install SQL Server 2000 Service Pack 4 (or higher)**!

See “Installing Microsoft SQL Server 2000 Service Pack 4” on page 77 for more information.

FactoryTalk AssetCentre uses a Microsoft SQL Server database to store project files and user data. If you already have SQL Server 2000 installed on the computer you are going to use as your FactoryTalk AssetCentre server, you can skip these steps (however, you may need to reconfigure the 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 2000 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/aa176550\(SQL.80\).aspx](http://msdn2.microsoft.com/en-us/library/aa176550(SQL.80).aspx), or search the Microsoft MSDN site for SQL Server 2000 collation settings.

To install SQL Server 2000 so it is compatible with FactoryTalk AssetCentre server:

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



It is possible to install SQL Server 2000 on a different computer from the one on which you will install the FactoryTalk AssetCentre server software.

2. Start the SQL Server 2000 installation from the Microsoft SQL Server 2000 CD.
3. Follow the on-screen instructions. In the Setup Type window:
 - For English language operating systems and SQL Server software, select **Typical**.
 - For non-English language operating systems or SQL Server software, select **Custom** so that you can specify the correct collation settings in step 4c below.
4. Follow the on-screen instructions for installation. See the steps below for information about particular settings.
 - a. The Services Accounts window of the installation program asks how you want to run the services for the SQL Server. Select **Use the Local System account**.



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.

- b. 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. 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.



The Authentication Mode window has a “Blank Password” check box. Checking this box allows you to have an sa account that has no password. **Do not check this box under any circumstances!** Doing so leaves your SQL Server and your computer open to attack.

- c. If you chose a custom setup type in step 3, then in the Collation Settings window, select **SQL Collations** and a dictionary-order, case-insensitive collation.



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



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

Installing Microsoft SQL Server 2000 Service Pack 4

After you install Microsoft SQL Server 2000, you **must** install the latest SQL Server 2000 service pack (at the time of this writing, Service Pack 4 is the latest service pack). The service pack is necessary for the software to run properly and will protect your SQL Server 2000 server from certain types of attacks.

To obtain this service pack, go to the Microsoft website, www.microsoft.com, and search for “SQL Server 2000 Service Pack.”



Reference

Additional ports you may have to open

If you are using a firewall, you may need to open ports for other Rockwell Automation products as well as for FactoryTalk AssetCentre. For the ports to open for FactoryTalk AssetCentre, see “Network requirements” on page 6.

This port	Of this type	Is used with this product	For this purpose
25	TCP	1769-L35E RSBizWare RSSql RSView Messenger	Outbound e-mail only
67-68	UDP	1734-AENT 1747-L55x 1756-ENBT 1756-ENET 1756-EWEB 1761-NET-ENI 1769-L35E 1785-ENET 1785-LXXE 1788-ENBT 1794-AENT 5820-EI PowerFlex Drives PowerMonitor 3000 PanelView PanelView Plus	Client only
69	UDP	5820-EI	For binary download, used in conjunction with BootP



This port	Of this type	Is used with this product	For this purpose
80	TCP	1734-AENT 1747-L55x 1756-ENBT 1756-ENET 1756-EWEB 1761-NET-ENI 1763-L16x 1769-L35E 1785-ENET 1785-LXXE 1788-ENBT 1794-AENT PowerFlex Drives PowerMonitor 3000 PanelView PanelView Plus RSBizWare RSView32 RSViewSE	
123	UDP	PowerMonitor 3000	Network time protocol
135	TCP	FactoryTalk	DCOM endpoint mapper
135	TCP	RSMACC	
161	UDP	1734-AENT 1747-L55x 1756-ENBT 1756-ENET 1761-NET-ENI 1769-L35E 1785-ENET 1785-LXXE 1788-ENBT 1794-AENT 5820-EI PowerFlex Drives PowerMonitor 3000 PanelView PanelView Plus	
300-400	UDP	PowerMonitor 3000	Master / slave configuration

This port	Of this type	Is used with this product	For this purpose
400-402	TCP	RSSql	Transaction Manager, Compression Server, and Configuration Server
1089	TCP / UDP		Foundation Fieldbus
1090	TCP / UDP		
1091	TCP / UDP		
1330	TCP	FactoryTalk	Object RPC
1331	TCP	FactoryTalk	Service control
1332	TCP	FactoryTalk	Server health
1433	TCP	RSMACC	SQL Server Communication (default port)
2222	TCP	1747-L55x 1771-DMC(x) 1785-ENET 1785-LxxE 5820-EI INTERCHANGE PowerMonitor II RSLinx	Uses port 2223 as the source port for TCP connections
2222	UDP	1734-AENT 1756-ENBT 1769-L35E 1788-ENBT 1794-AENT	I/O communications (used only by products that support I/O over EtherNET/IP)
3060	TCP	FactoryTalk	Directory Server file transfer
3622	TCP / UDP		
4120	TCP	RSBizWare	Production Server
4121	TCP	RSBizWare	Server Manager
4122	TCP	RSBizWare	PlantMetrics Server
4123	TCP	RSBizWare	Task Manager
4124	TCP	RSBizWare	Scheduler Server
4125	TCP	RSBizWare	Scheduler CTP Server
6543	TCP	FactoryTalk	Alarm Server
7600	TCP	FactoryTalk	Event Multiplexor

This port	Of this type	Is used with this product	For this purpose
7700	TCP	FactoryTalk	Event Server
7710	TCP	FactoryTalk	Directory Server
7720	TCP	RSViewSE	HMI Server
7721	TCP	RSViewSE	Server Framework
7722	TCP	RSViewSE	HMI Activation
7723	TCP	RSViewSE	Historical Data Log Reader
8080	TCP	RSBizWare	Production Server, reports
8081	TCP	RSBizWare	Server Manager
8083	TCP	CTP Server	
27000	TCP	FactoryTalk	License Server
44818	TCP / UDP	1734-AENT 1747-L55x 1756-ENBT 1756-ENET 1756-EWEB 1761-NET-ENI 1763-L16x 1769-L35E 1785-ENET 1785-LXXE 1788-ENBT 1794-AENT INTERCHANGE (rsicd) PowerFlex Drives PowerMonitor 3000 PanelView PanelView Plus RSLinx RSLinx Enterprise	Messaging, data transfer, upload/download, peer messaging, and so on. TCP type is used by RSLinx largely for browsing.
dynamic (1024-65535+)	TCP	FactoryTalk	DCOM dynamic ports

If your computers are using virtual private networking (VPN) software, you may need to work with your network administrator to permit traffic for these ports.

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