FactoryTalk AssetCentre Getting Results Guide

Version 13.00.00

Rockwell Automation

Getting Results

Original Instructions

Important User Information

Read this document and the documents listed in the additional resources section about installation, configuration, and operation of this equipment before you install, configure, operate, or maintain this product. Users are required to familiarize themselves with installation and wiring instructions in addition to requirements of all applicable codes, laws, and standards.

Activities including installation, adjustments, putting into service, use, assembly, disassembly, and maintenance are required to be carried out by suitably trained personnel in accordance with applicable code of practice.

If this equipment is used in a manner not specified by the manufacturer, the protection provided by the equipment may be impaired.

In no event will Rockwell Automation, Inc. be responsible or liable for indirect or consequential damages resulting from the use or application of this equipment.

The examples and diagrams in this manual are included solely for illustrative purposes. Because of the many variables and requirements associated with any particular installation, Rockwell Automation, Inc. cannot assume responsibility or liability for actual use based on the examples and diagrams.

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Throughout this manual, when necessary, we use notes to make you aware of safety considerations.

WARNING: Identifies information about practices or circumstances that can cause an explosion in a hazardous environment, which may lead to personal injury or death, property damage, or economic loss.

ATTENTION: Identifies information about practices or circumstances that can lead to personal injury or death, property damage, or economic loss. Attentions help you identify a hazard, avoid a hazard, and recognize the consequence.

IMPORTANT: Identifies information that is critical for successful application and understanding of the product.

Labels may also be on or inside the equipment to provide specific precautions.

SHOCK HAZARD: Labels may be on or inside the equipment, for example, a drive or motor, to alert people that dangerous voltage may be present.

BURN HAZARD: Labels may be on or inside the equipment, for example, a drive or motor, to alert people that surfaces may reach dangerous temperatures.

ARC FLASH HAZARD: Labels may be on or inside the equipment, for example, a motor control center, to alert people to potential Arc Flash. Arc Flash will cause severe injury or death. Wear proper Personal Protective Equipment (PPE). Follow ALL Regulatory requirements for safe work practices and for Personal Protective Equipment (PPE).

The following icon may appear in the text of this document.

Tip: Identifies information that is useful and can help to make a process easier to do or easier to understand.

Rockwell Automation recognizes that some of the terms that are currently used in our industry and in this publication are not in alignment with the movement toward inclusive language in technology. We are proactively collaborating with industry peers to find alternatives to such terms and making changes to our products and content. Please excuse the use of such terms in our content while we implement these changes.

Table of Contents

Introduction to FactoryTalk AssetCentre

FactoryTalk® AssetCentre monitors your factory automation system, provides centralized tools to minimize downtime due to unauthorized actions or failing devices, and manages the life cycle of Rockwell Automation hardware devices in the system. It does this by:

- securing access to actions within the FactoryTalk AssetCentre system. For information about security, see Quick Start 1: Configure the system on page 23.
- managing device configuration files. For more information about configuration files, see Quick Start 2: Design the asset tree on page 51.
- 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. For information about Disaster Recovery, see Quick Start 3: Set up Disaster Recovery schedules on page 59.
- monitoring FactoryTalk-enabled software products and logging system events and user actions (recorded in the Event log and Audit log respectively). For information about logs, see Quick Start 4: View and search logs on page 66.
- providing version control and archiving of program files and documents. For information about Archive, see Quick Start 5: Open and edit files in Archive on page 75.
- synchronizing lifecycle information in the FactoryTalk AssetCentre server and client with the data on the Rockwell Automation life cycle website. For information about lifecycle management, see Quick Start 6: Manage Rockwell Automation hardware lifecycle on page 86.

Activation

FactoryTalk AssetCentre software is activated on two criteria:

- capacity (number of devices)
- capability (purchased functionality)

In addition, the FactoryTalk AssetCentre server must be activated. For more information on activation, refer to the *Activation in FactoryTalk AssetCentre* topic of Help.

About the documentation set

The documentation set includes:

- **FactoryTalk AssetCentre Installation Guide** (Document ID FTAC-IN005). Use this manual to install the FactoryTalk AssetCentre system. This manual is also available in the FactoryTalk AssetCentre installation package in 13.00.00-FTAssetCentre\Docs. The file name is FactoryTalk AssetCentre Installation Guide.pdf. You can find it in Rockwell Automation Literature Library.
- **Help**. Use the comprehensive Help for assistance while using the FactoryTalk AssetCentre system.
- **FactoryTalk AssetCentre Getting Results Guide** (Document ID FTAC-GR002). Use this manual to get started with the FactoryTalk AssetCentre system. You can find it in Rockwell Automation Literature Library.
- **FactoryTalk AssetCentre Utilities User Manual** (Document ID FTAC-UM001). Use this manual for assistance while using an array of utilities whose capabilities are not present in the FactoryTalk AssetCentre system. You can find it in Rockwell Automation Literature Library.

This manual is intended to give a general overview of the software. For more detailed information, please refer to FactoryTalk AssetCentre Help.

FactoryTalk AssetCentre Help

FactoryTalk AssetCentre Help is available from the **Help** menu, by pressing **F1** or clicking the **Show Help** button, or by clicking the **Help** button in any dialog box in the FactoryTalk AssetCentre software.

About this book

This manual provides you with information on how to get started using your FactoryTalk AssetCentre system. It is not intended to be a comprehensive users guide. For complete information on all features, tasks, and interface elements, refer to Help.

This book is written for FactoryTalk AssetCentre users. We assume you are familiar with:

- Microsoft® Windows® operating systems including basic Windows networking and administration tasks
- RSLinx® Classic and FactoryTalk® Linx communication software
- Rockwell Automation programing tools for programmable logic controllers
- control networks such as DeviceNet and programmable logic controllers such as ControlLogix® processors

Contact Technical Support

If you cannot find answers to your questions in this manual, Help, or on the Technical Support Web site, call Technical Support.

- **Phone**—440-646-3434 in the USA
- **Technical Support hours of operation—**8:00 AM - 5:00 PM

If you are not located in the USA and want to contact Rockwell Automation Support by telephone, go to https://www.rockwellautomation.com/global/support/overview.page, choose language as needed, click **Local and Contact Support**, click **Call us**, and then select your region and country for information about contacting your local support organization.

When you call you should be at your computer and be prepared to give the following information:

- the product version number
- the type of hardware you are using
- the exact wording of any messages that appeared on your screen
- a description of what happened and what you were doing when the problem occurred
- a description of how you tried to solve the problem

Tip: Select **Help > About** from the **Menu** bar to show the product serial number and product version number.

For information about all of the products available from Rockwell Automation or for technical support, go to one of the following sites:

- https://www.rockwellautomation.com/en-us/products.html#software
- https://www.rockwellautomation.com/global/support/overview.page
- https://rockwellautomation.custhelp.com

Navigate the FactoryTalk AssetCentre client

All actions in FactoryTalk AssetCentre take place in the FactoryTalk AssetCentre Client. Changes you make in the client window are stored on the FactoryTalk AssetCentre Server.

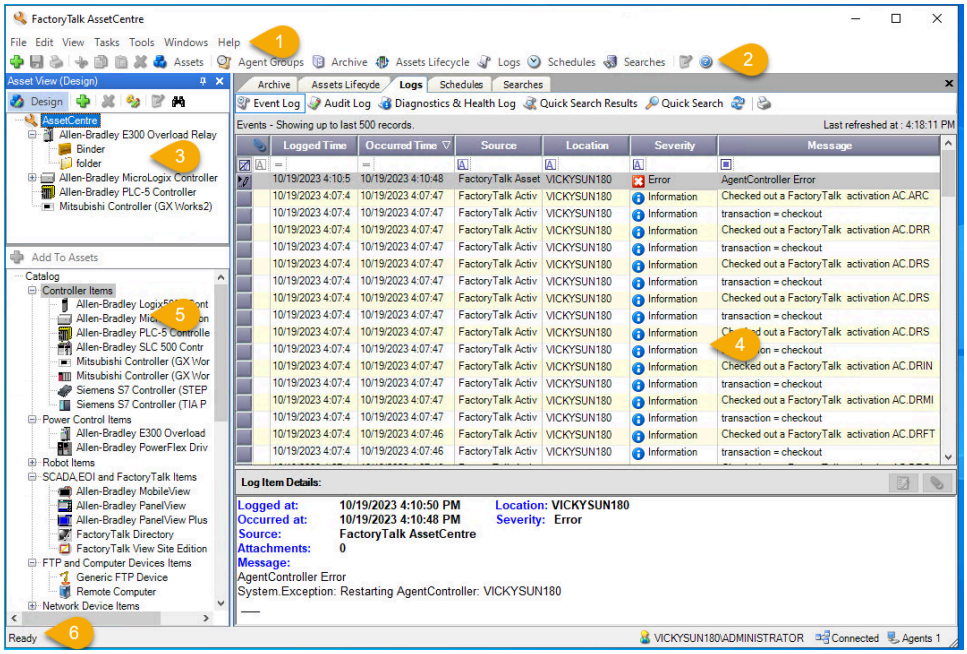
Run the FactoryTalk AssetCentre client

To start the FactoryTalk AssetCentre Client

- Using Windows Search, find **FactoryTalk AssetCentre Client**, and then double-click the name.

If the client fails to start properly, see If the client fails to start on page 89.

Elements of the FactoryTalk AssetCentre client window



The screen includes the following items:

1. Menu bar
2. Toolbar
3. Asset view

   It shows an assets tree that you create to represent your plant.
4. Workspace pane

   It shows the information and controls of the tools:
   - Address Book
   - Agent Groups
   - Archive
   - Assets Lifecycle
   - Logs
   - Schedules
   - Searches

5. Asset catalog

   Available in the design mode, it lists all the types of assets that you can add to the assets tree in the asset view.

6. Status bar

   It shows the following information:

   - The currently logged on user
   - The status of the connection to the server
   - The number of connected agent computers in the system

Asset view

Everything that you do in FactoryTalk AssetCentre begins with an asset. The Asset View shows the asset tree, a representation of your plant. In the asset tree, you can include all of the assets (anything from a device to a program to a procedure document) that you want to control, back up, or monitor.

Asset

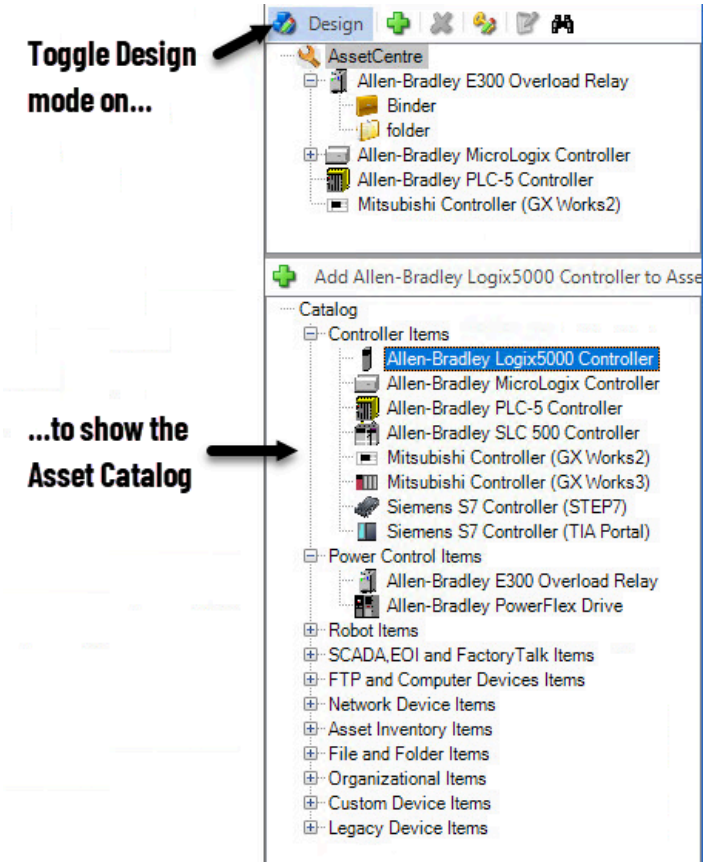
An asset in FactoryTalk AssetCentre represents items of value in your automation system — things you want to control and to which you want to monitor access. Assets can be automation device items and legacy device items (including controllers, drives, robots, Allen-Bradley® E300 Overload Relay, Asset Inventory, FactoryTalk Directory, FactoryTalk View Site Edition, and more), files (program files or even drawings or word processing files), folders, or containers of other assets. While FactoryTalk AssetCentre is intended to handle files for automation projects, any kind of file can become an asset in FactoryTalk AssetCentre.

Design mode

In this mode, you can:

- Set up or modify the asset tree in the Asset View so that it represents your system.
- Add devices to the asset tree from the Asset Catalog or edit devices already in the asset tree. The Asset Catalog is only shown in Design mode.
- Set up or modify the agent group tree in the Agent Groups plug-in.

To enter Design mode, click the **Design** button in the Asset View. The **Design** button toggles Design mode on and off. You can also, on the **Menu bar**, select **Edit > Design Mode** or press **F3**. Only one user in your system can be in Design mode at a time.



Tip: You must have **Switch to Design mode** permission to enter Design mode. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.

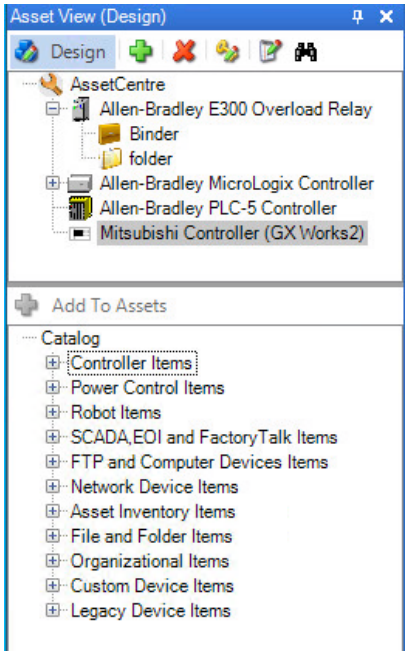
If you have **Switch to Design mode** permission and still cannot enter Design mode to view the Asset Catalog, see If you can't enter Design Mode on page 90.

Asset catalog

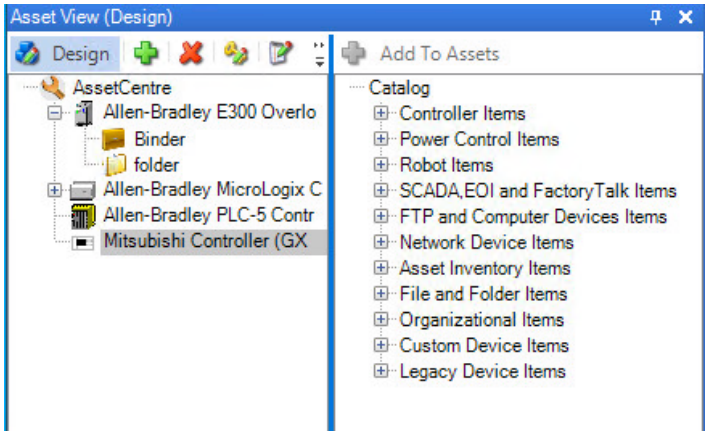
The Asset Catalog lists all the types of assets that can be added to the asset tree. The Asset Catalog is only available when the Asset View is in Design mode. In Design mode, you will use the Asset Catalog to select and add assets by dragging them from the Asset Catalog to the asset tree. For information about adding assets to the asset tree, see Step 2: Add assets to the asset tree on page 53.

The Asset Catalog can be positioned either below the Asset View or beside the Asset View.

- To position the Asset Catalog below the Asset View, select **View > Layout > Split Horizontally.**



- To position the Asset Catalog beside and to the right of the Asset View, select **View > Layout > Split Vertically**.



About asset types

Assets fall into these categories:

- Controller Items
- Power Control Items
- Robot Items
- SCADA, EOI and FactoryTalk Items
- FTP and Computer Device Items
- Network Device Items
- Asset Inventory Items
- Files and Folder Items
- Organizational Items
- Custom Device Items
- Legacy Device Items

Assets can be placed in the asset tree in the root or in a container. Device assets, except for Generic Device, count toward capacity activation. Most device assets are used with the Disaster Recovery capability. An asset represents a physical automation device in the control system.

Controller Items

A controller asset can be placed in the root or in a container in the asset tree.

- **Allen-Bradley Logix 5000 Controller**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Allen-Bradley Logix 5000 Controller, retrieve a copy of those files and compare them to a master version, execute a source code validation for vulnerability detection, and run a change detect schedule to get a list of changes from the controller log.
- **Allen-Bradley MicroLogix Controller**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Allen-Bradley MicroLogix™ Controller or retrieve a copy of those files and compare them to an archive file.
- **Allen-Bradley PLC-5 Controller**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Allen-Bradley PLC-5® Controller or retrieve a copy of those files and compare them to an archive file.
- **Allen-Bradley SLC 500 Controller**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Allen-Bradley SLC™ 500 Controller or retrieve a copy of those files and compare them to an archive file.
- **Mitsubishi Controller (GX Works2)**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Mitsubishi® Controller (GX Works2™) or retrieve a copy of those files and compare them to an archive file.
- **Mitsubishi Controller (GX Works3)**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Mitsubishi Controller (GX Works3™) or retrieve a copy of those files and compare them to an archive file.
- **Siemens S7 Controller (STEP7)**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Siemens® S7 Controller (STEP7) or retrieve a copy of those files and compare them to an archive file.
- **Siemens S7 Controller (TIA Portal)**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Siemens S7 Controller (TIA Portal) or retrieve a copy of those files and compare them to an archive file.

Power Control Items

A power control asset can be placed in the root or in a container in the asset tree.

- **Allen-Bradley E300 Overload Relay**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Allen-Bradley E300 Overload Relay or retrieve a copy of those files and compare them to an archive file.
- **Allen-Bradley PowerFlex Drive**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Allen-Bradley PowerFlex® Drive or retrieve a copy of those files and compare them to an archive file.

Robot Items

A robot asset can be placed in the root or in a container in the asset tree.

- **Motoman Robot**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Motoman Robot or retrieve a copy of those files and compare them to an archive file.

SCADA, EOI and FactoryTalk Items

SCADA, EOI and FactoryTalk Items can be placed in the root or in a container in the asset tree.

- **Allen-Bradley MobileView**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Allen-Bradley MobileView™ or retrieve a copy of those files and compare them to an archive file.
- **Allen-Bradley PanelView**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Allen-Bradley PanelView™ or retrieve a copy of those files and compare them to an archive file.
- **Allen-Bradley PanelView Plus**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Allen-Bradley PanelView Plus or retrieve a copy of those files and compare them to an archive file.
- **FactoryTalk Directory**
  Use this asset type to run a schedule that backs up the FactoryTalk® Directory of your system on a regular basis.
- **FactoryTalk View Site Edition**
  Use this asset type to run a schedule that backs up FactoryTalk® View Site Edition (SE) network applications, including HMI server, FactoryTalk Directory, FactoryTalk Linx, and FactoryTalk Alarms and Events data.

FTP and Computer Device Items

FTP and Computer Device Items can be placed in the root or in a container in the asset tree.

- **Generic FTP Device**
  Use this asset type for devices that use FTP, like robots and drives that host a FTP Server, such as FANUC or ABB robots. The Generic FTP device replaced the vendor-specific robot asset type, Fanuc Robot and ABB Robot, in version 7.00 and later.
- **Remote Computer**
  Use this asset type with the Disaster Recovery capability to back up and verify the contents of a specified shared folder on a computer in the system. A binder asset is used to specify which files within the shared folder should be operated on.

Network Device Items

Network Device Items can be placed in the root or in a container in the asset tree.

- **Allen-Bradley Stratix Switch**
  Use this asset type to run a schedule to store a backup copy of files that are associated with the Allen-Bradley Stratix™ Switch or retrieve a copy of those files and compare them to an archive file.

Asset Inventory Items

Asset Inventory Items can be placed in the root or in a container in the asset tree.

- **Asset Inventory**
  Use this asset type to scan physical automation devices on the network. When you run a backup or backup and compare schedule on an Asset Inventory asset, the Asset Inventory agent service scans the connected devices and computers on the network and stores unique identification information about hardware, firmware, and software in the backup data. You can open the backup data in grid view to see the detailed scanning result of devices and associated software. You can also add the scanned assets to the asset tree or update assets in the asset tree with different properties.

Files and Folder Items

These types of assets can be placed under any device or container in the asset tree. These asset types do not count toward asset capacity activation.

- A **Binder** is a collection of files and folders that is treated as a unit. For example, when you check out a binder all the contents of the binder are checked out and placed in your working folder.
- A **File** in the asset tree can be any type of data file, from a device's configuration file, to a text file, to a CAD drawing.
- A **Folder** is simply a container in which to place files. You may want to organize files within a folder if you have many files associated with a component or area of your plant, such as a procedure document, an inventory spreadsheet, CAD drawings, and so on. Folders can only contain Files, Binders, and Links, not Devices.
- A **Link** to a binder or file is similar to a shortcut in Microsoft Windows. It is not a second copy of the file or binder, but rather a link to an existing file or binder in the asset tree. Including the same file or binder in several locations in the asset tree would compromise version control for that file or binder. Instead, place a link to the file or binder in the additional locations.

Organizational Items

An organizational asset can be placed in the root or in another container in the asset tree. These asset types do not count toward asset capacity activation.

- A **Generic Container** provides a means of representing a functional area of your plant that is comprised of multiple devices. For example, a wash rack might be comprised of a processor, a robot, valves, flow meters, and so on. (Valves and flow meters are not included in FactoryTalk AssetCentre. Additional device types will be added in future releases. For the time being, they could be represented by a Generic Device.)

  Tip: While containers and folders both contain assets, they are not interchangeable. Containers can hold ANY type of asset (including folders). Use a generic container to hold devices and other associated assets. Folders and asset inventories can ONLY contain files, links, binders, and other folders.

- A **Generic Device** enables you to add unsupported devices to the asset tree.

Custom Device Items

Custom Device Items can be placed in the root or in a container in the asset tree.

- **Custom Device**

  Use this asset type to perform Disaster Recovery capability for a physical automation device which has no corresponding asset type in FactoryTalk AssetCentre. When configuring your backup tool and compare tool in **Tools > Options**, you can perform Disaster Recovery capability for your device automatically.

Legacy Device Items

Legacy Devices Items can be placed in the root or in a container in the asset tree.

- **ABB Robot**

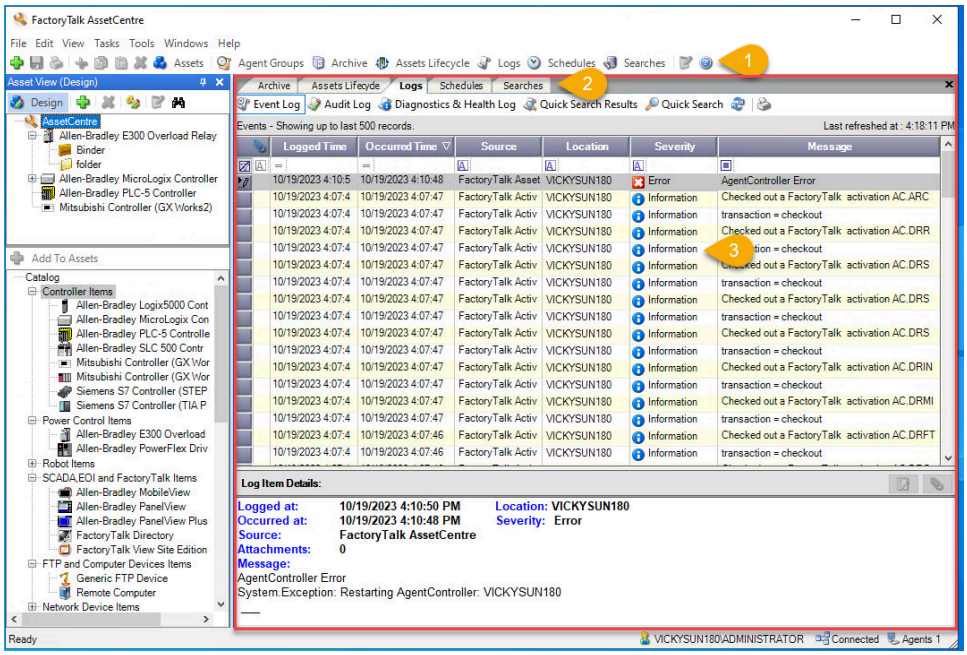
  Use this asset type to run a schedule to store a backup copy of files that are associated with the ABB Robot or retrieve a copy of those files and compare them to an archive file.
- **FANUC Robot**

  Use this asset type to run a schedule to store a backup copy of files that are associated with the FANUC Robot or retrieve a copy of those files and compare them to an archive file.
- **RA Drive**

  Use this asset type to run a schedule to store a backup copy of files that are associated with the RA Drive or retrieve a copy of those files and compare them to an archive file.

Workspace pane

The **Workspace** Pane shows the information and controls for the FactoryTalk AssetCentre tools: Archive, Schedules, Logs, Searches, Agent Groups, and Address Book. After a tool is selected, it appears on a tab in the **Workspace** Pane:



1. Click a button to show a tool in the **Workspace** Pane.

   Alternatively, you can choose a tool on the **View** menu.
2. Tabs appear on the **Workspace** Pane for each tool that is open.
3. Users can get the severity of the logs and take the corresponding actions.

Use the **Workspace** Pane to:

- Set up and run schedules. See Quick Start 3: Set up Disaster Recovery schedules on page 59.
- View and search logs. See Quick Start 4: View and search logs on page 66.
- Manage file versions in Archive. See Quick Start 5: Open and edit files in Archive on page 75.

Toolbar

The following table lists the FactoryTalk AssetCentre client toolbar buttons and provides a brief description of each button's functions:

Button	Description
New	Adds a new item such as an asset, schedule, search, or Address Book contact or group, depending on what is selected and has focus in the rest of the window. This button is unavailable if nothing can be added (for example, if the Asset View has focus, but is not in Design mode).
Save	Available only when information (such as a schedule or search) has been edited, but not yet saved.
Print	Available only when viewing a log. Prints either the selected records or all records listed.
Cut	Combined with the **Paste** button, the **Cut** button moves an asset from one location in the tree to another. Select the asset, then click the **Cut** button. Click on the container in which you want to place the asset, then click the **Paste** button. The asset that was cut does not disappear from its original location until it is pasted in the new location.
Copy	Combined with the **Paste** button, the **Copy** button duplicates an asset in the tree. First select the asset and click the **Copy** button. Next select the container in which you want to place the asset, then click the **Paste** button.
Paste	Combined with the **Cut** (or **Copy**) button, the **Paste** button moves (or copies) an asset from one location in the tree to another. Select the asset, then click the **Cut** (or **Copy**) button. Click on the container in which you want to place the asset, then click the **Paste** button.
Delete	Deletes the selected asset (if in Design mode), search, schedule, or Address Book contact or group. This has the same function as the **Delete** button on the Asset View toolbar, Search toolbar, and Schedules toolbar.
Assets	Opens or shifts focus to the Asset View. This view contains the asset tree that you create to represent your system. For more information about the asset tree, see Quick Start 2: Design the asset tree on page 51.

Button	Description
Agent Groups	Opens the **Agent Groups** tab on which you can manage the agents into groups. If the tab is open, it brings the **Agent Groups** tab to the front.
Archive	Opens or shifts focus to the **Archive** tab. Archive is FactoryTalk AssetCentre's source control tool that you will use to manage file versions. For more information, see Quick Start 5: Open and edit files in Archive on page 75.
Assets Lifecycle	Opens the **Assets Lifecycle** tab on which you can synchronize lifecycle information in the FactoryTalk AssetCentre server and client with the data on the Rockwell Automation lifecycle website, or refresh lifecycle information in the AssetCentre client with the AssetCentre server.
Logs	Opens or shifts focus to the **Logs** tab. This tab allows you to view any of the logs — the Audit Log, the Event Log, and the Diagnostics and Health Log. For more information, see Quick Start 4: View and search logs on page 66.
Schedules	Opens or shifts focus to the **Schedules** tab where you can set up scheduled operations such as Backup and Backup and Compare. For more information, see Quick Start 3: Set up Disaster Recovery schedules on page 59.
Searches	Opens or shifts focus to the **Searches** tab where you can search the logs or the Archive history. For more information, see Quick Start 4: View and search logs on page 66.
Properties	Shows the properties of the selected item: an asset in the Asset View or a contact in the Address Book, for example. For an asset, you can only edit the properties if the Asset View is in Design mode.
Show Help	Shows the online help related to the part of the software you are currently using.

Menu bar

Any menu can be clicked or opened by holding down the **Alt** key and pressing the underlined letter in the menu name. For example, to show the **Tools** menu, press **Alt-t**. For information on any menu command, refer to the *About the Menu Bar* topic of the FactoryTalk AssetCentre Help.

Right-click menus

Right-click menus provide access to most functions in the FactoryTalk AssetCentre client and are available throughout the software. For example, right-click in the Asset View, on an asset in the Asset View, or in the Workspace Pane to see a list of functions particular to that item.

For information on a particular command on a right-click menu, refer to Help and search for the command.

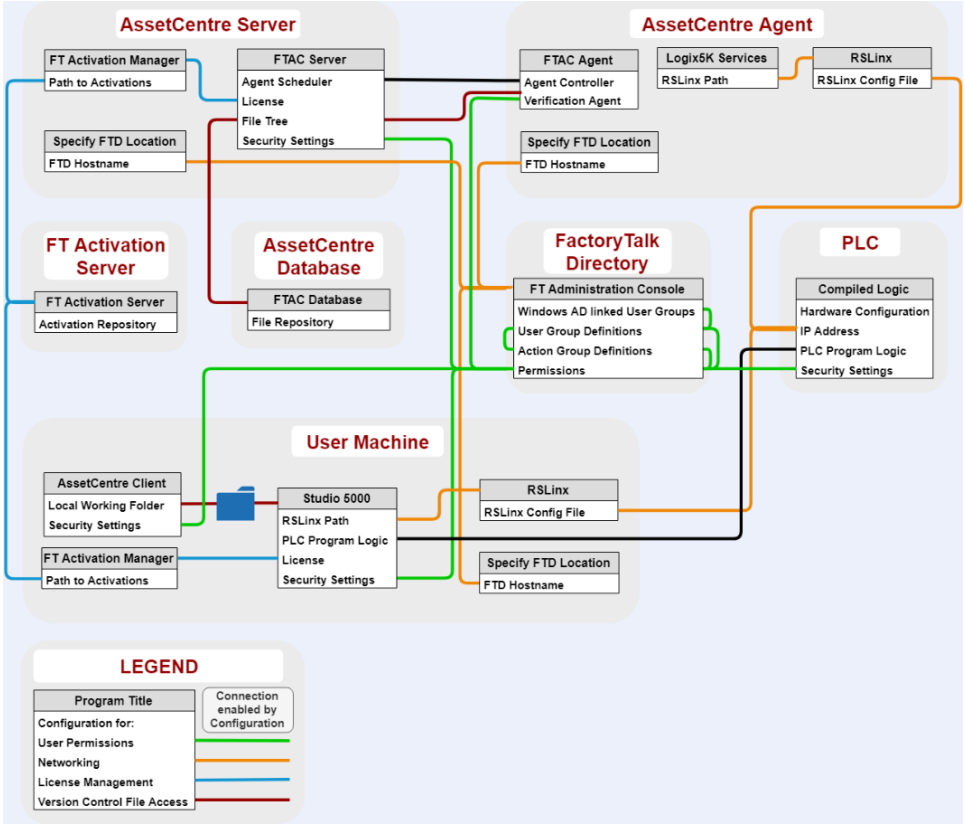
Status bar

The Status Bar at the bottom of the FactoryTalk AssetCentre window shows the currently logged on FactoryTalk user and the status of the connection to the server. It also shows the number of FactoryTalk AssetCentre agents running in the system.

If the server status is Disconnected, see If the client cannot communicate with the server on page 90.

FactoryTalk AssetCentre system architecture

The following graphic shows the FactoryTalk AssetCentre system architecture and relationship of user permission, networking, license management, and version control within the architecture.



About FactoryTalk AssetCentre Web Client

FactoryTalk AssetCentre Web Client is a web application that provides access to the FactoryTalk AssetCentre system from a web browser. As opposed to the FactoryTalk AssetCentre Desktop Client with full read-and-write functions, the web client allows you to do the following to monitor your factory automation system:

- View the asset tree and archive workspace.
- Check in and check out files or binders, undo a check-out, unblock a workflow, pin, unpin, label, and promote files and binders, view and remove labels, and copy a version from backup data to configuration data.
- View, update, refresh, report lifecycle information, view, filter, and sort report.
- View, filter, and sort logs.
- Create, edit, delete, activate or deactivate, run, stop, filter, and sort schedules.
- Run, filter, and sort searches.
- View database information, set database limitations, analyze index fragmentation, and rebuild fragmented indexes.
- Create a log cleanup schedule.

We recommend that you use the TLS protocol with FactoryTalk AssetCentre Web Client. See Step 6: Configure the TLS protocol on page 31.

Access FactoryTalk AssetCentre Web Client

You must sign in every time you try to open the web client with a browser.

To sign in to FactoryTalk AssetCentre Web Client

1. From the **Start** menu, select **FactoryTalk AssetCentre Web Client**, or open the browser, and then enter the URL address http://<FQDN>/RockwellSoftware/AssetCentreWebClient.

   Tip: FQDN is the fully qualified domain name of the FactoryTalk AssetCentre Server computer. If you are changed the default port in site binding, you need to include the self-defined port number in the computer name part in the form as *MYSERVER:PortNumber*.

2. On the AssetCentre Web Client page, enter the user name and the password.

   IMPORTANT: You can sign in to FactoryTalk AssetCentre Web Client using a FactoryTalk user or Windows-linked user.

3. Select **Sign in**.

Quick Start 1: Configure the system

After installing the FactoryTalk AssetCentre software, there are several steps you must perform to start using the software. The next several chapters of this guide take you through the steps required to quickly get results using FactoryTalk AssetCentre.

The main tasks necessary to begin using FactoryTalk AssetCentre are:

- Quick Start 1: Configure the system on page 23
- Quick Start 2: Design the asset tree on page 51
- Quick Start 3: Set up Disaster Recovery schedules on page 59
- Quick Start 4: View and search logs on page 66
- Quick Start 5: Open and edit files in Archive on page 75
- Quick Start 6: Manage Rockwell Automation hardware lifecycle on page 86

This current chapter will concentrate only on the steps necessary to configure your FactoryTalk AssetCentre system.

Quick Start steps for configuring the system

To configure your FactoryTalk AssetCentre system, you must perform the following steps:

- Step 1: Add users to the FactoryTalk Directory on page 23
- Step 2: Add client computers on page 24
- Step 3: Set feature security for FactoryTalk AssetCentre on page 25
- Step 4: Add contacts to the FactoryTalk AssetCentre Address Book on page 28
- Step 5: Set up FactoryTalk AssetCentre database limitations on page 30
- Step 6: Configure the SSL protocol on page 31
- Step 7: Configure Windows Authentication on page 47

Step 1: Add users to the FactoryTalk Directory

A user must be able to authenticate with the FactoryTalk Directory in order to be authorized to use FactoryTalk AssetCentre.

Tip: This section contains only basic instructions for using the FactoryTalk Directory and FactoryTalk Security. For background information and information regarding more advanced procedures, see the Help section in 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.

We recommend that you use a native FactoryTalk Group with Windows AD linked Group. This practice simplifies the process of confirming the security configuration as testing is performed on the native FactoryTalk Group, and policy is written about which Windows user and groups are added to the native FactoryTalk group.

To add a user to the FactoryTalk Directory

1. Start the FactoryTalk Administration Console:
   a. Click **Start**, and then use search to search for *FactoryTalk Administration Console*.
   b. Click **FactoryTalk Administration Console**.
      FactoryTalk Administration Console appears.
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. Determine how you want to add user accounts to the system. You can add users indirectly by adding Windows-linked Groups or Azure AD Groups. Or, directly add users using Windows-linked User or native FactoryTalk User accounts. For more information, see "Accounts and groups" in *FactoryTalk Services Platform Help*. Consider the following:
   - Adding user accounts indirectly, using groups, is a best practice. Adding user accounts indirectly moves group management, that is, who is a member of which group, from the FactoryTalk system administrator to IT.
     This technique also simplifies commissioning as a group's permissions are validated in the system, but group membership is determined by policy or standard operating procedures. Further abstracting the security design by adding Windows-linked or Azure AD groups to a native FactoryTalk Groups that are used within the system's access-control lists results in a security system that is more maintainable and sustainable.
   - Windows-linked groups and Windows-linked users can be part of either a Microsoft Active Directory domain or local to a specific computer.
     The Microsoft Windows operating system is used to authenticate user credentials and determine Windows group membership. When disconnected from the network, the system can use valid cached Windows user credentials to perform authentication.
   - Azure AD groups requires the FactoryTalk Directory server has access to the Microsoft Azure. The system utilizes Microsoft Azure to authenticate user credentials and determine Azure AD group membership. When disconnected from the network, a user that is a member of an Azure AD group cannot be authenticated.
   - Native FactoryTalk User accounts are managed solely by the FactoryTalk system. Their access is independent of the Windows operating system. The FactoryTalk system authenticates the user and determines group member ship. When disconnected from the network, a user is authenticated using local valid FactoryTalk Directory cache. If the local FactoryTalk Directory cache has expired, the user cannot be authenticated.
6. Enter the information for the user.

For more detailed instructions on adding users and grouping users, refer to the FactoryTalk Services Platform Help.

Step 2: Add client computers

Before adding a client computer to the FactoryTalk AssetCentre system, install the FactoryTalk AssetCentre Desktop Client or the FactoryTalk AssetCentre Diagnostics Connector on a computer that meets the system requirements and is connected to the same network as the FactoryTalk AssetCentre server.

To add a client computer

1. If necessary, close all open Windows programs.
2. From the installation package, double-click **Setup.exe**.
3. Select **AssetCentre Desktop Client** or **AssetCentre Diagnostics Connector (Optional)**.
4. Follow the on-screen instructions to complete the installation.

NOTE: For more information about how to install FactoryTalk AssetCentre Desktop Client software and FactoryTalk AssetCentre Diagnostics Connector, see *FactoryTalk AssetCentre Installation Guide*.

During the installation, the FactoryTalk Services Platform will be installed and the computer will be added to the FactoryTalk Network Directory. If for some reason the client computer is not in the FactoryTalk Network Directory, use the FactoryTalk Administration Console to add it. See the Help section in FactoryTalk Administration Console for instructions on adding a computer.

Tip: If you have a significant number of computers for which you need to permit or restrict access, consider grouping them in the FactoryTalk Administration Console 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.

Step 3: Configure security for FactoryTalk AssetCentre

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.

IMPORTANT: 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 any FactoryTalk CPR 9 version.

To configure security settings

1. Start the FactoryTalk Administration Console:
   a. Click **Start**, and then use search to search for *FactoryTalk Administration Console*.
   b. Click **FactoryTalk Administration Console**.
   FactoryTalk Administration Console appears.
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**.

IMPORTANT: 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), from **Windows Start** menu, select **Rockwell Software > FactoryTalk AssetCentre Server Settings**.

5. In the **Feature Security Properties** window, click the policy you want to change, and then click the browse button for the policy.
   See Policy settings and their meanings on page 26.
6. 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**.
7. Click the appropriate box to allow or deny the user permission to the selected feature.
8. Click **OK**.

Tip: As a default, FactoryTalk AssetCentre uses Microsoft Windows file associations. To specify which software program will open a specific type of file, set file associations. See the *Set file associations* topic of Help.

Policy settings and their meanings

The following table shows the policy settings and their functions.

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.
Configure Archive Options Settings	Turn on or off the function that allows Logix Designer to perform archive activities, such as file check-in, without direct interaction with the FactoryTalk AssetCentre Desktop Client and Web Client. FactoryTalk AssetCentre Diagnostics Connector installation is mandatory if only FactoryTalk AssetCentre Web Client is used.
Override Archive Undo Check Out	Undo a check out even if a different user checked the file out.
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.

This policy setting	Controls whether users can
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.
Configure System Archive Working Folders	Set the system working folder to which all users check out files unless they have a personal working folder.
Allow Empty Comment at Check In	Leave the comment field empty as they check in an asset.
Allow Empty Comment at Check Out	Leave the comment field empty as they check out an asset.
Clear the Get Writable Copy check box by default	Enable or clear the Get Writable Copy check box during get. Denying this permission enables the Get Writable Copy check box; a Get retrieves a writable copy of an Archive object. Allowing this permission (by default) clears the Get Writable Copy check box; a Get retrieves a read-only copy of an Archive object.
Store Latest Version Only	Choose to store only the latest version in the Archive.
Set Maximum Versions	Configure the total maximum number of versions stored in the Archive.
Configure Asset Inventory Settings	Configure the settings in the Asset Inventory window.
Configure Assets Lifecycle Sync	Synchronize lifecycle information in the FactoryTalk AssetCentre Server, Desktop Client, and Web Client with the Rockwell Automation lifecycle website.
Display Calibration Management Data*	View Calibration Management data in FactoryTalk AssetCentre.
Perform Calibration Management*	Access Calibration Management functionality 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.
Configure Database Limitations	Configure the total maximum size of the AssetCentre database, the size warning levels, the maximum number of versions per archive asset, the maximum size of Event, Audit, and Diagnostics logs, and the database capacity status refresh rate.
Configure Database Maintenance	Configure automatic database maintenance, manually analyze, or rebuild index fragmentation.
Run Archive Database Cleanup Wizard	Run the Archive Database Cleanup Wizard to delete unused versions of files.

This policy setting	Controls whether users can
Run Log Database Cleanup Wizard	Run the Log Database Cleanup Wizard to remove old records from the logs. Data can be exported and saved in a separate file.
Switch to Design mode	Enter Design mode, in which the user can edit the asset tree.
Use Web Client	Authorized users can use FactoryTalk AssetCentre Web Client.
Change Server Settings	Authorized users can run the Server Settings Utility and change system settings.
Configure Options	Authorized users can configure the system and client options.
View Event Log	Show the Event Log and run a search on the Event Log.
View Audit Log	Show the Audit Log and run a search on the Audit Log.
View Diagnostics and Health Log	Show 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 a status history for a Diagnostics and Health Log record.
Enable or Disable DTMs*	Enable and disable DTMs in the DTM Catalog.
Edit DTM Network*	Show the DTM Networks dialog box to edit the DTM network.
Run PDC Field Edition*	Use the Process Device Configuration Field Edition software.
Create a new schedule	Create a schedule.
Edit a schedule	Change existing schedules.
Delete a schedule	Delete schedules.
View a schedule	Show the Schedules tab.
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.

* Starting from FactoryTalk AssetCentre version 10.00, process device capabilities are not supported. The policies marked with asterisk are only kept for viewing purposes if you have upgraded FactoryTalk AssetCentre from version 9.00 or earlier.

Step 4: Add contacts to the Address Book

Use the FactoryTalk AssetCentre Address Book tab to create contact information that the system uses to notify users about the progress and outcome of FactoryTalk AssetCentre schedules and other system-related events. You can then add contacts to groups (for example, allelectricians@myplant.com) if your existing mail system supports groups. This allows you to inform recipients about system events simultaneously.

Tip: You cannot import groups from another e-mail program. More than one user can create groups at the same time.

To create contacts and groups, you must be granted **View Address Book and Edit Address Book** permissions. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.

To add contacts to the Address Book

1. Start the FactoryTalk AssetCentre Client.
2. Select **View > Address Book**.
3. Select **Tasks > Add New Address Book Contact** or click the **New** button (Keyboard users: Press **Ctrl-N**).
4. In the **New Contact name** dialog box, complete the **Contact** tab. You must enter a unique name for the contact that is not the same as any other contact or group name.
5. Click the **Internet** tab and complete it. You must enter an e-mail address for the contact to receive notifications.

   Tip: If in your existing e-mail system you have a group that already has an e-mail address (for example, a group of electricians with the e-mail address AllElectricians@MyCompany.com), you can use that group's existing e-mail address. Simply create a contact and give it a name (for example, Electricians) and enter the group's e-mail address (AllElectricians@MyCompany.com) as the contact's default e-mail address. The individual e-mail addresses of the electricians in the group will not be added to the Address Book as contacts.

6. Click **OK.**

   Once you have created Address Book contacts, you can add those contacts to Address Book groups. Groups cannot be imported from another e-mail program.
7. Click **Tasks > Add New Address Book Group**.

   Tip: To add members to an existing rather than new group, see Help. Select **Help > Contents**. Open the **Address Book** and click the **Modify contacts and groups** topic.

8. On the **Group** tab in the **Group Name** field, enter a name for the group.
9. Click **Select Members.**
10. In the **Contacts/Groups** list on the left of the **New Group** dialog box, select the contact or group to add to the group, and click **Select**.
11. Click **OK**.

    Tip: To perform additional Address Book tasks (for example, to delete or modify groups or contacts), see Help. Select **Help > Contents**, and open the *Addresses Book* topic.

Step 5: Set up FactoryTalk AssetCentre database limitations

Use the **Options: Database Limitations** dialog box to specify the settings of database limitations, including:

- Total maximum size of the AssetCentre database
- Size warning levels
- Maximum number of versions per archive asset
- Maximum size of database table capturing logs
- Database capacity status refresh rate
- Email notification

Tip: Database limitation configuration is recommended but optional. You can use FactoryTalk AssetCentre without setting up database limitations.

To set up database limitations

1. Start the FactoryTalk AssetCentre client.
2. Select **Tools > Options**.
3. Under **Category** on the left side of the dialog box, select **Database Limitations**.
4. Select the **Database Limitations Enabled** check box, and specify the settings as desired.

Tip: By default, the **Database Limitations Enabled** check box is not selected, and all the settings of database limitations are unavailable. To select the **Database Limitations Enabled** check box to configure all the settings, you must have **Configure Database Limitations** permission. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.

The following table shows how to configure each setting for Database Limitations.

Settings	How to configure
Total maximum size of the AssetCentre database	Enter a value for the total maximum size of the AssetCentre database. No minimum value is required.
Size warning levels	Specify the percentage of database capacity as the **Warning level** or **Critical level**. The status of database usage appears in the status bar of the FactoryTalk AssetCentre client.
Maximum number of versions per archive asset	Enter a value for the maximum version number of an asset in archive. You can also configure the maximum number of versions per asset in Archive.
Maximum size of database table capturing logs	Enter a value for the maximum file size of Event Log, Audit Log, and Diagnostics Log. If the file size of any log exceeds its maximum size, FactoryTalk AssetCentre writes the log, and adds a new warning log about the current event log size exceeding its maximum size. When the Event, Audit, or Diagnostic and Health logs reach the maximum size, a warning message appears when you

Settings	How to configure
	run the FactoryTalk AssetCentre client, indicating the log size status.
Database capacity status refresh rate	Enter a value to specify the frequency to refresh the database capacity status. The default value is 2. The minimum accepted value is 1, and 0 is not accepted. When the database capacity reaches the warning or critical level, or the Event, Audit, or Diagnostic and Health logs reach the maximum size, a warning message appears when the FactoryTalk AssetCentre client refreshes the database capacity status.
Email notification	Specify the email addresses to receive notifications when database size, asset version max, or log size reaches alarm level. Click the browse button to select email address from **Contacts and Groups** address book dialog. If you set any value as 0 or higher than the maximum size, or leave any value blank, it is translated as unlimited.
SCAN to Proceed	Validate whether the current total database size, event log size, audit log size, diagnostics log size, and asset versions meet each own specified threshold. This operation is required when making any changes to the Database Limitations.

Not all situations during database limitation configuration are covered in this manual. For detailed information, refer to the FactoryTalk AssetCentre Help.

Step 6: Configure the TLS protocol

Beginning with FactoryTalk AssetCentre version 13.00.00, it is required to turn on TLS 1.2 for secure communications within the FactoryTalk AssetCentre system. We recommend that you disable TLS 1.0 and TLS 1.1 in the system and we strongly recommend that you use a TLS certificate signed by a certificate authority (CA).

For more information about TLS protocol version support, see Protocols in TLS/SSL. For more information about the compatible operating system, see *Software requirements* in *FactoryTalk AssetCentre Installation Guide*.

IMPORTANT:

- When the installation environment is targeted to use TLS 1.3, note that FactoryTalk AssetCentre requires both TLS 1.2 and TLS 1.3 to be enabled. FactoryTalk AssetCentre will not work if only TLS 1.3 is enabled.
- Using the TLS protocol is an essential part for the communication security over your network.
- If you want to configure the protocols as needed, you should use the same protocol for all computers deployed in your network.

For more information about the TLS configuration, see *Configure the TLS protocol for FactoryTalk AssetCentre* in *FactoryTalk AssetCentre Installation Guide*.

Create a self-signed TLS certificate

Follow these steps to create a self-signed TLS certificate on the FactoryTalk AssetCentre Server computer.

To create an TLS certificate

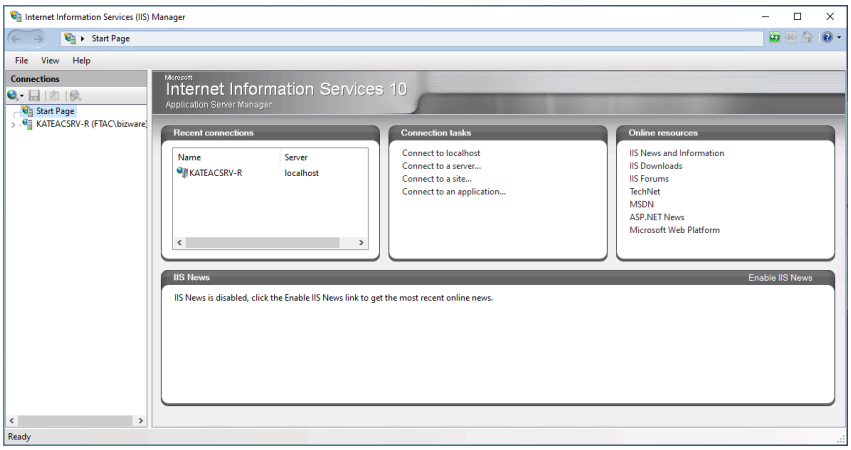
1. Open Internet Information Services (IIS) Manager on the FactoryTalk AssetCentre server computer.

   On Windows Server 2019, Windows Server 2016, and Windows Server 2012 R2:

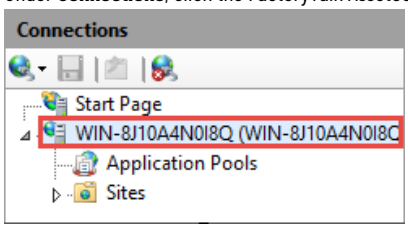
   a. On the taskbar, click .

   b. In the search box, type *inetmgr*, and then press **Enter**.

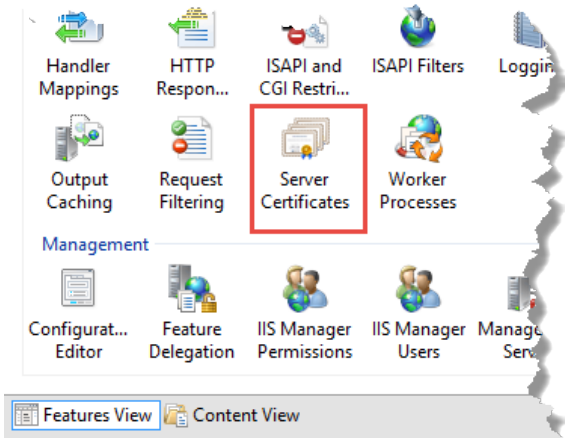
   c. Click the best match result.



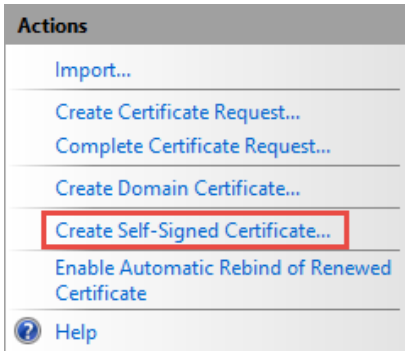
2. Under **Connections**, click the FactoryTalk AssetCentre server.



3. In **Features View**, double-click **Server Certificates**.



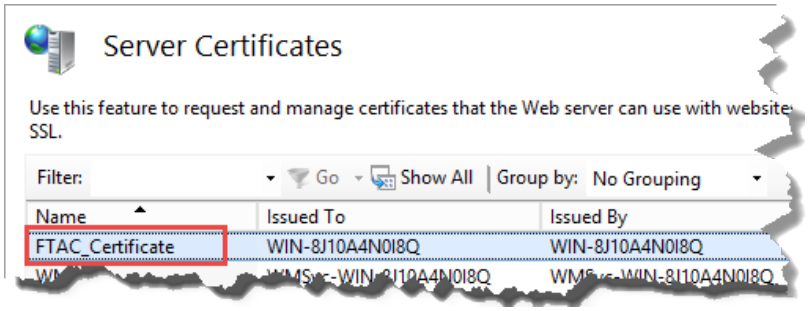
4. Under **Actions**, click **Create Self-Signed Certificate**.



5. In the **Create Self-Signed Certificate** dialog box:
   - Specify a name for the certificate.
   - Select **Web Hosting** as the certificate store.

6. Click **OK**.

   The created TLS certificate is listed.



Export the created TLS certificate for FactoryTalk AssetCentre client and agent computers

After creating an TLS certificate on the FactoryTalk AssetCentre server computer, export the certificate which will need to be imported on the FactoryTalk AssetCentre client and agent computers.

To export the created TLS certificate

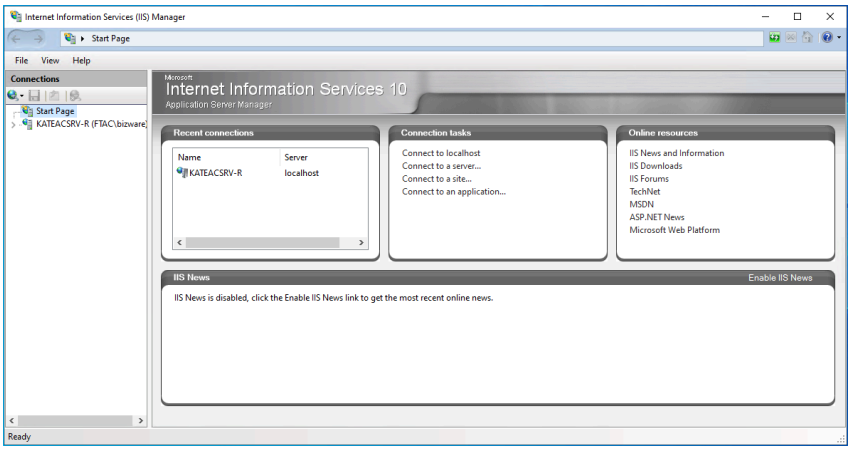
1. Open Internet Information Services (IIS) Manager on the FactoryTalk AssetCentre server computer.

   On Windows Server 2019, Windows Server 2016, and Windows Server 2012 R2:

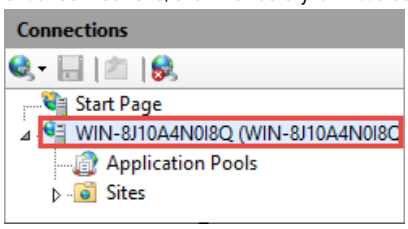
   a. On the taskbar, click  .

   b. In the search box, type *inetmgr*, and then press **Enter**.

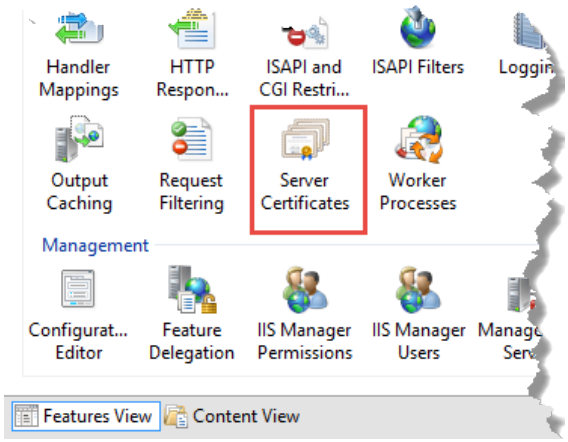
   c. Click the best match result.



2. Under **Connections**, click the FactoryTalk AssetCentre server.

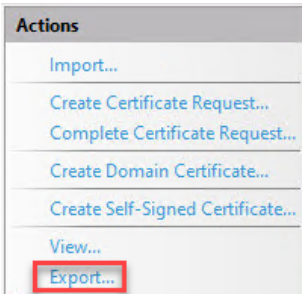


3. In **Features View**, double-click **Server Certificates**.



4. Select the TLS certificate that you have created.

5. Under **Actions**, click **Export**.



6. In the **Export Certificate** dialog box:
   - Under **Export to**, click ..., and then specify the location and name to save the certificate.
   - Specify the password for the certificate.
7. Click **OK**.

Configure a site binding

Before you begin

- Create a self-signed TLS certificate on page 32.

To configure a site binding

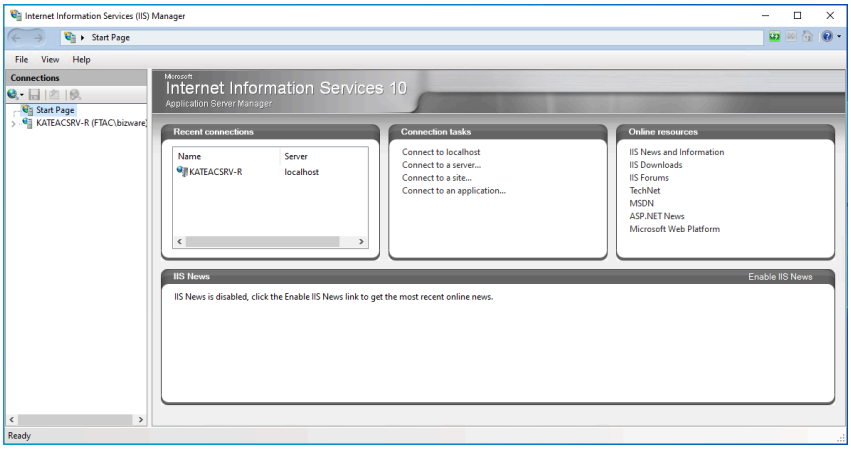
1. Open Internet Information Services (IIS) Manager on the FactoryTalk AssetCentre server computer.

   On Windows Server 2019, Windows Server 2016, and Windows Server 2012 R2:

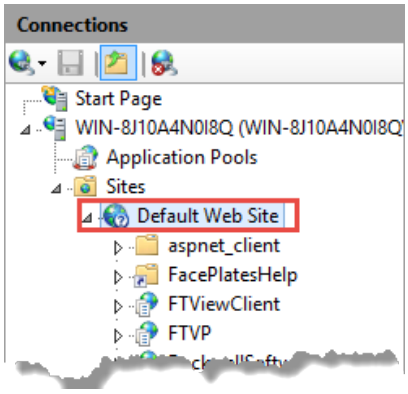
   a. On the taskbar, click .

   b. In the search box, type *inetmgr*, and then press **Enter**.

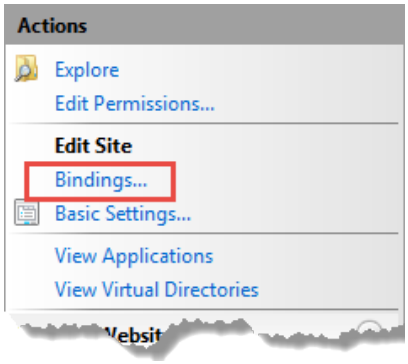
   c. Click the best match result.



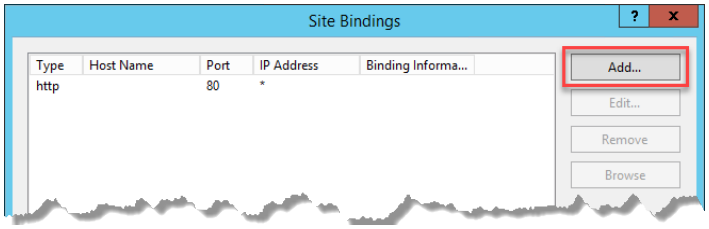
2. Navigate to **localhost > Sites > Default Web Site**.



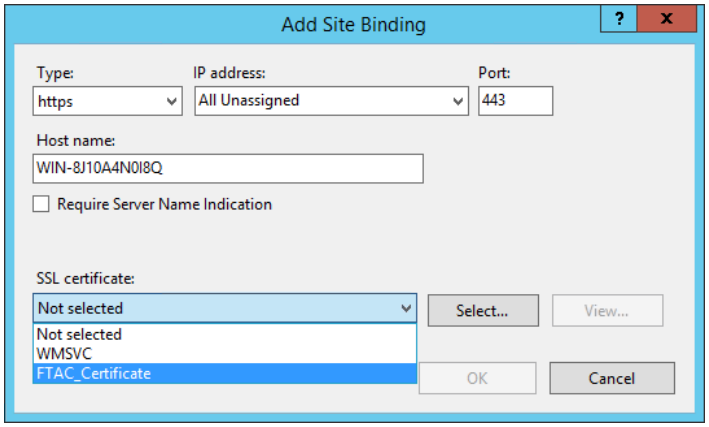
3. Under **Actions**, click **Bindings**.



4. In the **Site Bindings** dialog box, click **Add**.



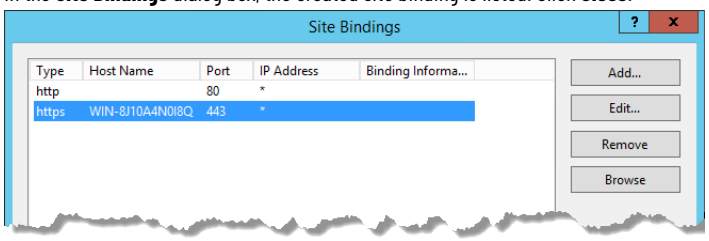
5. In the **Add Site Binding** dialog box, configure the following settings.



For this option...	Do this...
Type	Select **https**.
IP address	Select **All Unassigned**.
Port	Keep the default port number 443 or if you needed, you may change it to a self-defined port. If you use a self-defined port, you need to configure a firewall rule and web services URL on page 44.
Host name	Type the fully qualified domain name (FQDN) of the FactoryTalk AssetCentre server.
SSL certificate	Select your TLS certificate. See Create a self-signed TLS certificate on page 32.

6. Click **OK**.

7. In the **Site Bindings** dialog box, the created site binding is listed. Click **Close**.



Tip: You can remove the default HTTP site binding and only keep the created HTTPS site binding.

Configure SSL settings for Management of Change, FactoryTalk AssetCentre Desktop Client and Agent, and FactoryTalk AssetCentre Web Client

Before you begin

- Create a self-signed TLS certificate on page 32.
- Configure a site binding on page 35.

To configure SSL settings for Management of Change, FactoryTalk AssetCentre Desktop Client and Agent, and FactoryTalk AssetCentre Web Client

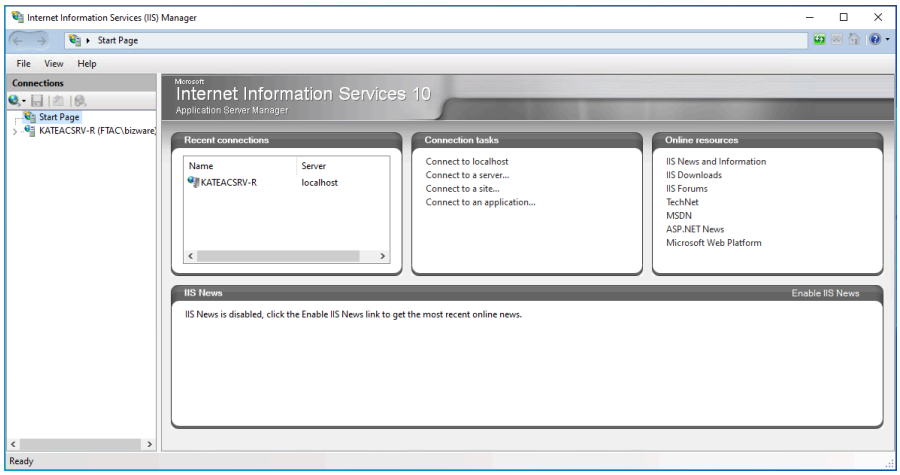
1. Open Internet Information Services (IIS) Manager on the FactoryTalk AssetCentre server computer.

   On Windows Server 2019, Windows Server 2016, and Windows Server 2012 R2:

   a. On the taskbar, click .

   b. In the search box, type *inetmgr*, and then press **Enter**.

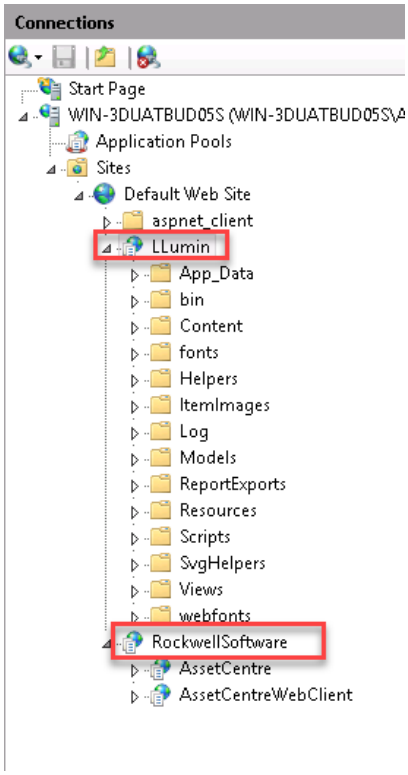
   c. Click the best match result.



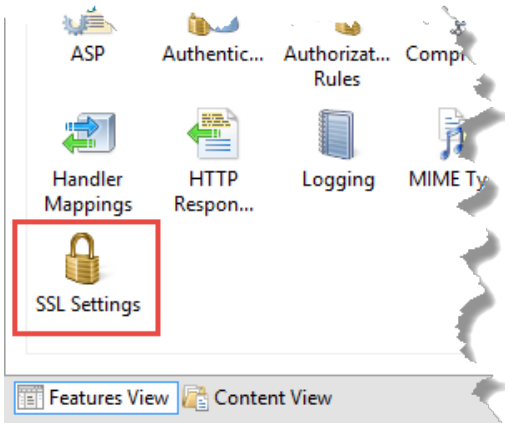
2. Navigate to **localhost > Sites > Default Web Site**.

   To configure the SSL settings for Management of Change, select **LLumin**.

To configure the SSL settings for FactoryTalk AssetCentre Desktop Client and Agent, and FactoryTalk AssetCentre Web Client, select **AssetCentre** and **AssetCentreWebClient** under **RockwellSoftware**.



3. In **Features View**, double-click **SSL Settings**.

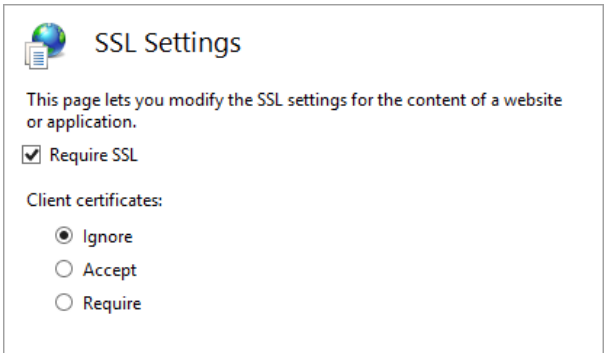


4. Make sure the following options are selected:
   - **Require SSL**

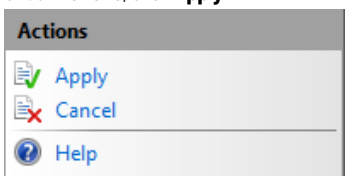
     (FactoryTalk AssetCentre Web Client only) Selecting this option will result in deactivating the HTTP protocol (with the default port 80). When you type *http://* in the web browser, it will be automatically redirected to *https://*.

- **Ignore**

  This option applies to the client certificates.



5. Under **Actions**, click **Apply**.



6. Restart the computer.

Turn on secure communication between the server, client(s), and agent(s)

Once you configured the TLS protocol, turn on secure communication between the server, client(s), and agent(s) in the **Configure Server Settings Utility** window.

To enable secure communication

1. Open the **Configure Server Settings Utility** window.

   On Windows Server 2019, Windows Server 2016, and Windows Server 2012 R2:

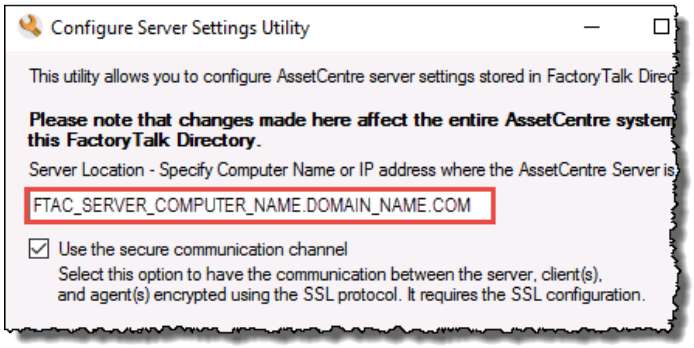
   a. On the taskbar, click .

   b. In the search box, type *Server Settings*.

   c. Click **FactoryTalk AssetCentre Server Settings**.

2. Enter the user name and password to log on to FactoryTalk, and then click **OK**.

   In the **Configure Server Settings Utility** window, under **Server Location**, the domain name (FQDN) of the FactoryTalk AssetCentre server computer will be detected automatically.



3. Select the **Use the secure communication channel** option.
4. Click **OK**.

Import the self-signed TLS certificate to client and agent computers

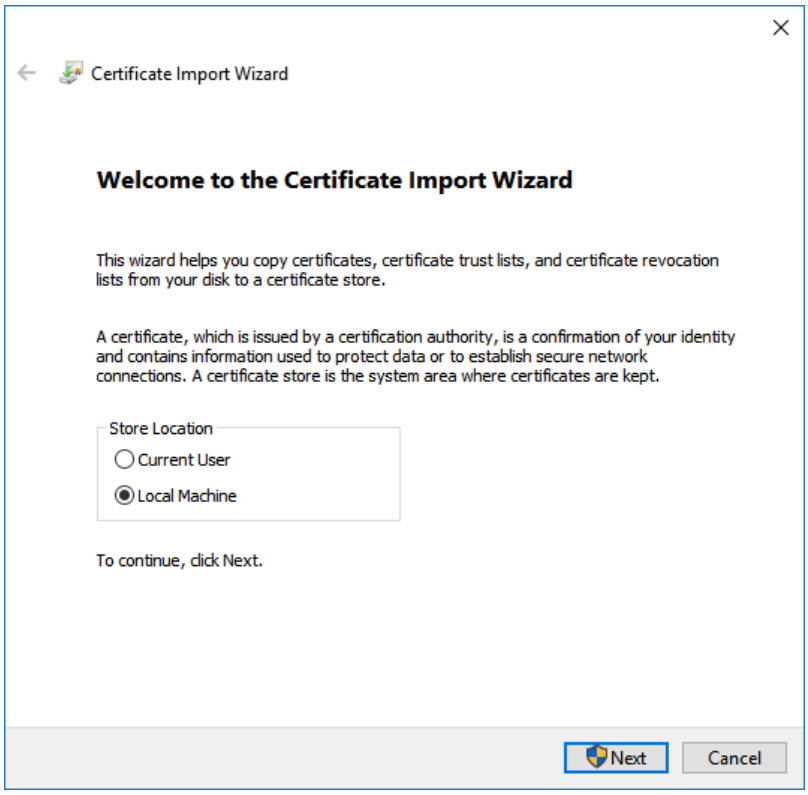
On the client and agent computers, add the self-signed TLS certificate to the Trusted Root Certification Authorities certificate store.

Before you begin

- Create a self-signed TLS certificate on page 32.
- Export the created TLS certificate on page 33.

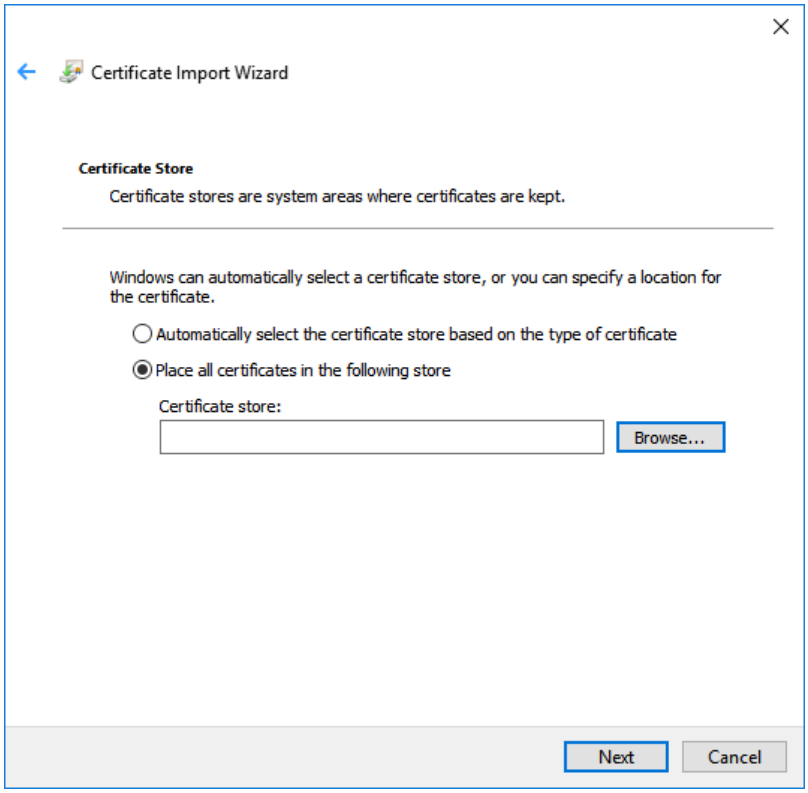
To import the self-signed TLS certificate on operating systems

1. Copy the created TLS certificate on the computer.
2. Double-click the TLS certificate.
3. Select **Local Machine**, and then click **Next**.

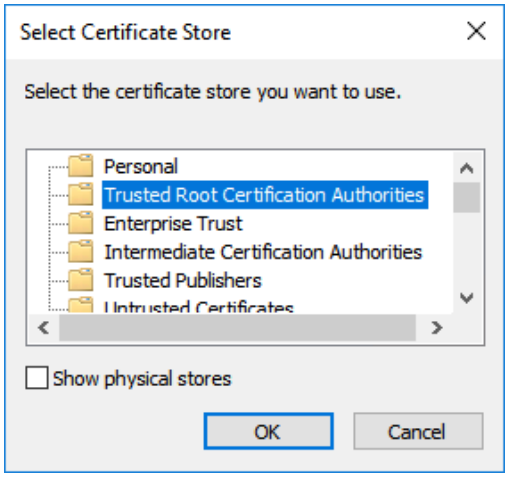


4. When prompted to confirm the operation, click **Yes**.
5. Follow the on-screen instructions until you get to the **Certificate Store** screen.

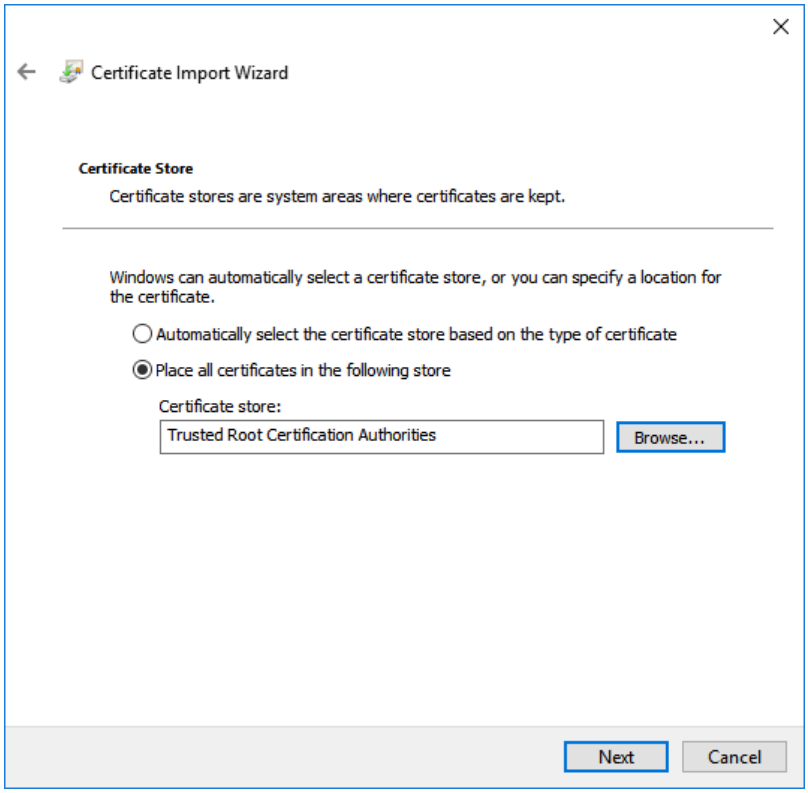
6. On the **Certificate Store** screen, select **Place all certificates in the following store**.



7. Click **Browse**, select **Trusted Root Certification Authorities**, and then click **OK**.



8. Click **Next**.



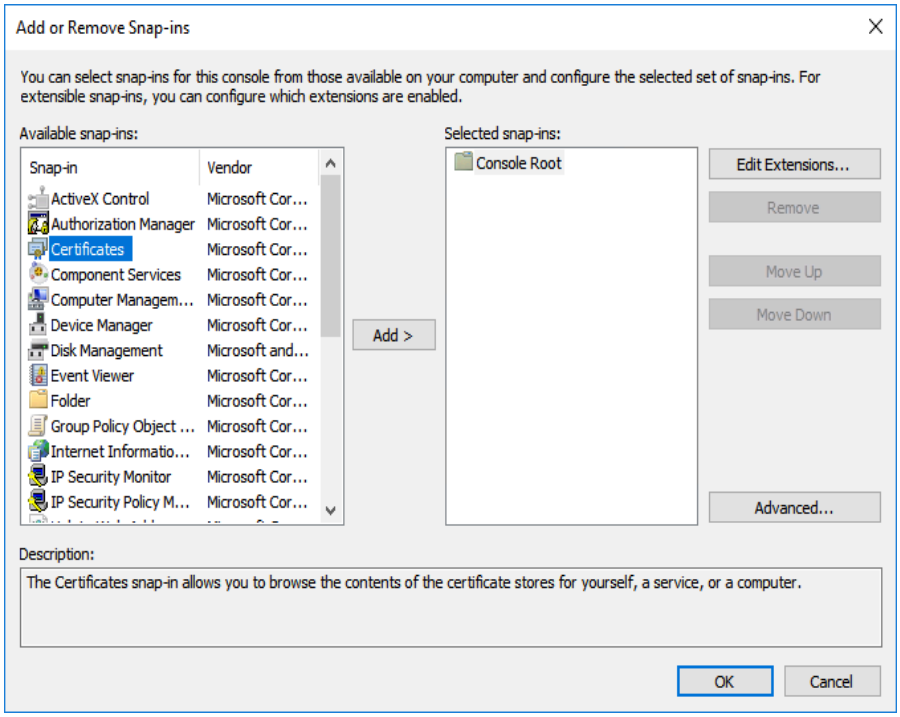
9. Follow the on-screen instructions to complete the import.

To verify the import operation

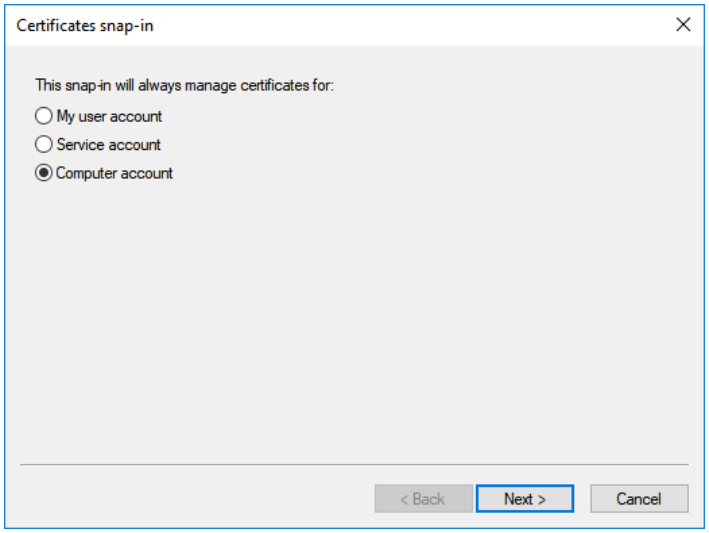
1. Click **Start**, type *mmc*, and then press **Enter**.

   The Microsoft Management Console opens.

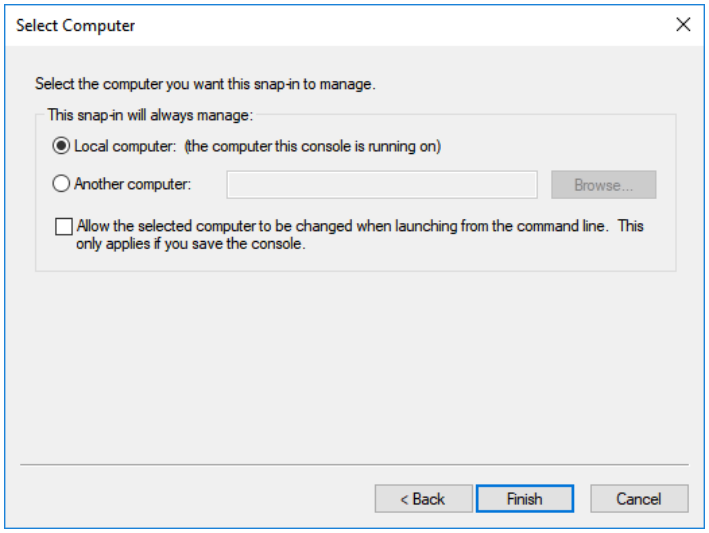
2. Click **File > Add/Remove Snap-in**.
3. In the **Add or Remove Snap-ins** dialog box, select **Certificates**, and then click **Add**.



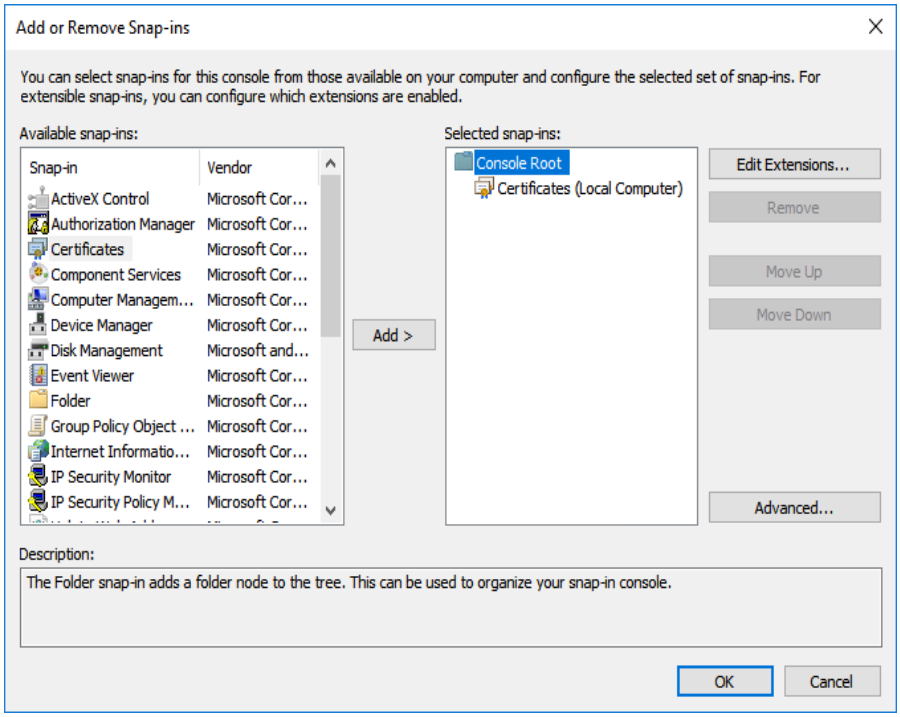
4. In the **Certificates snap-in** dialog box, select **Computer account**, and then click **Next**.



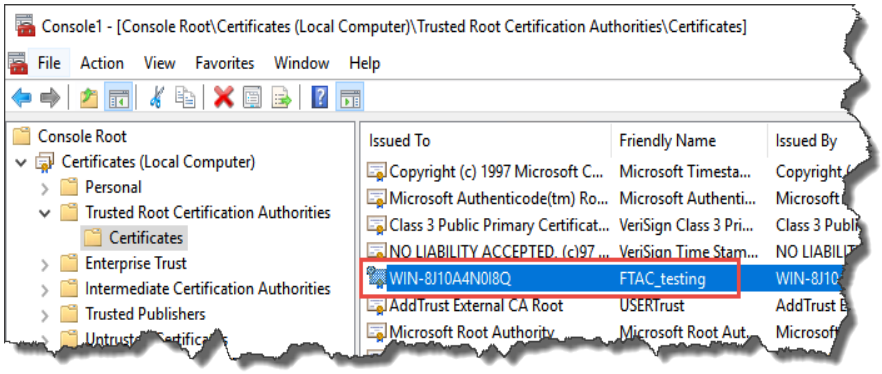
5. Click **Finish**.



6. In the **Add or Remove Snap-ins** dialog box, click **OK**.



7. In the Microsoft Management Console, navigate to **Console Root > Certificates (Local Computer) > Trusted Root Certification Authorities > Certificates**, and verify that the TLS certificate is listed.



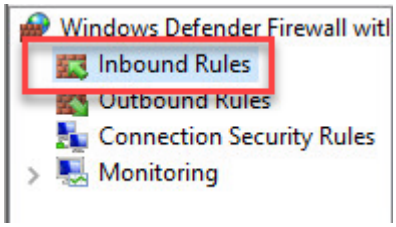
8. If the TLS certificate is not listed, make sure to select **Certificates** under **Trusted Root Certification Authorities > Certificates**, and then click **Action > All Tasks > Import**.
9. Follow the on-screen instructions to complete the import.

Configure a firewall rule if the default port is modified

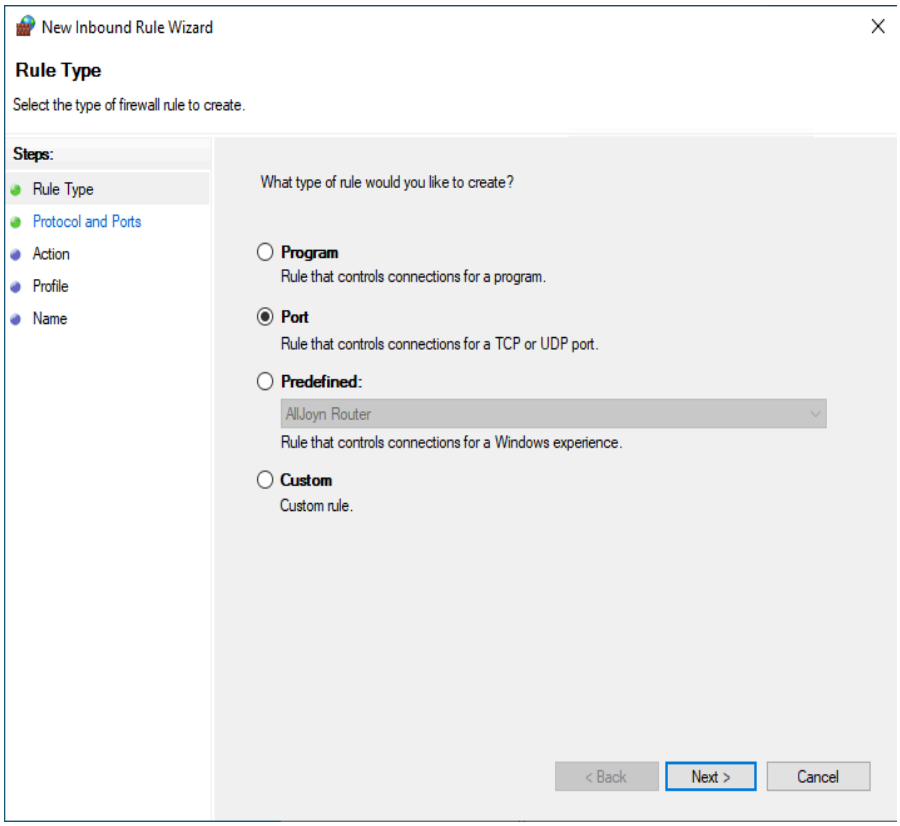
If the default port 443 is modified during the site binding configuration, you need to configure a Windows firewall rule for the self-defined port.

To configure a Windows firewall rule

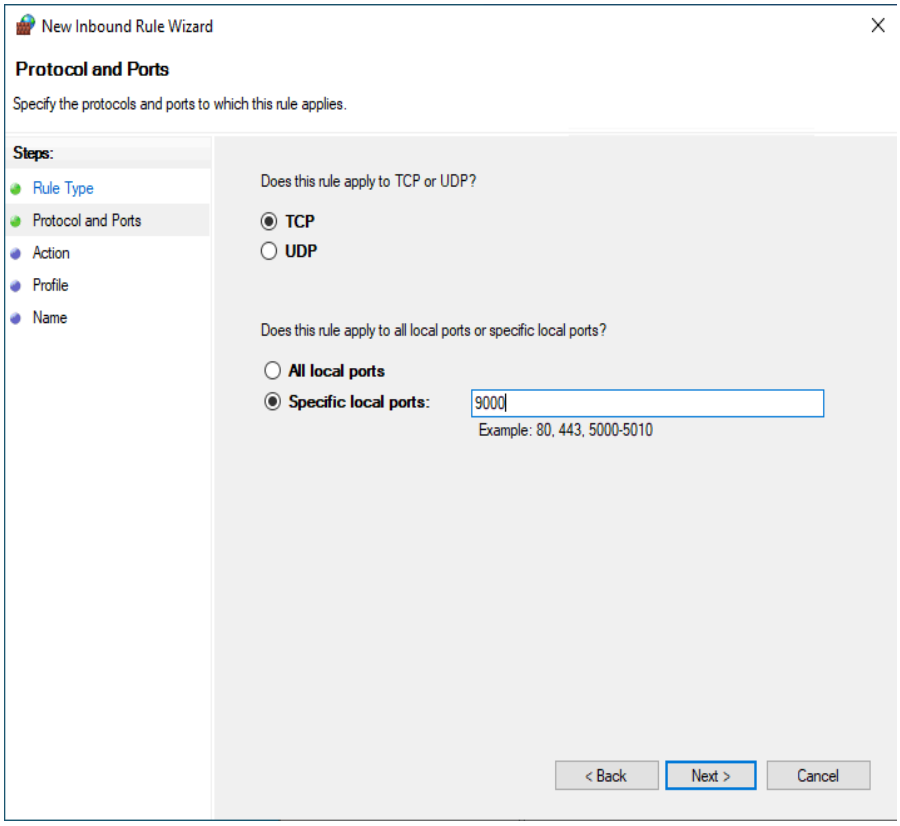
1. On the FactoryTalk AssetCentre server computer, click **Start**, type *firewall*, and then click **Windows Defender Firewall with Advanced Security**.
2. Click **Inbound Rules**.



3. Click **Action > New Rule**.
4. In the **New Inbound Rule Wizard**, select **Port**, and then click **Next**.

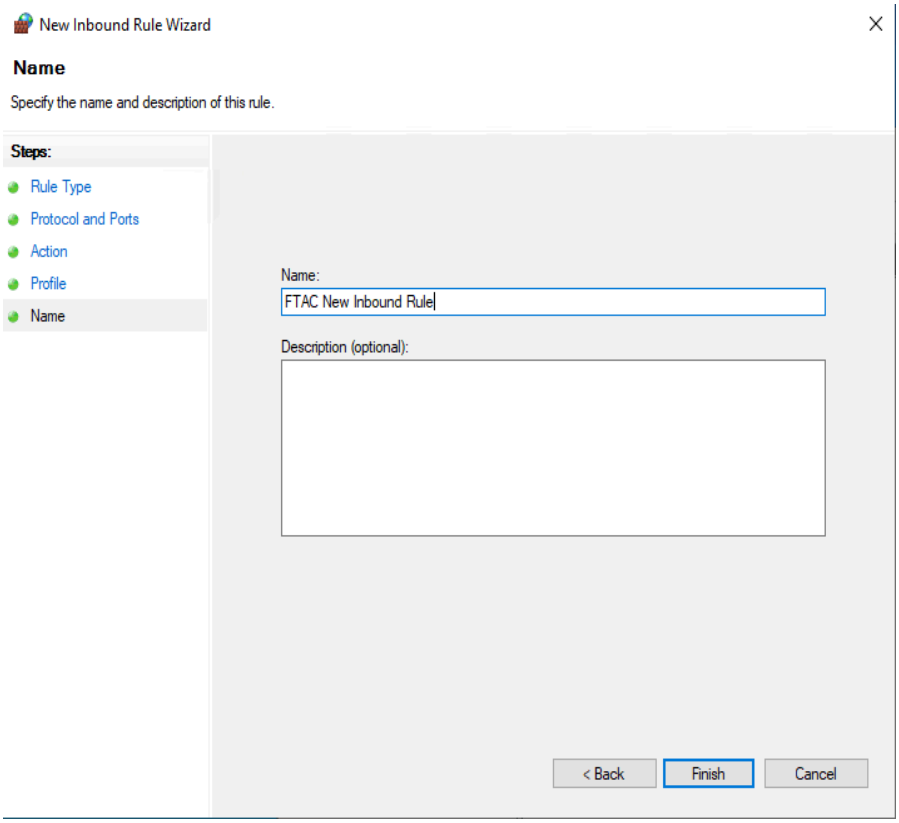


5. In the **Specific local ports** box, enter the self-defined port as set during the site binding configuration, for example *9000*, and then click **Next**.

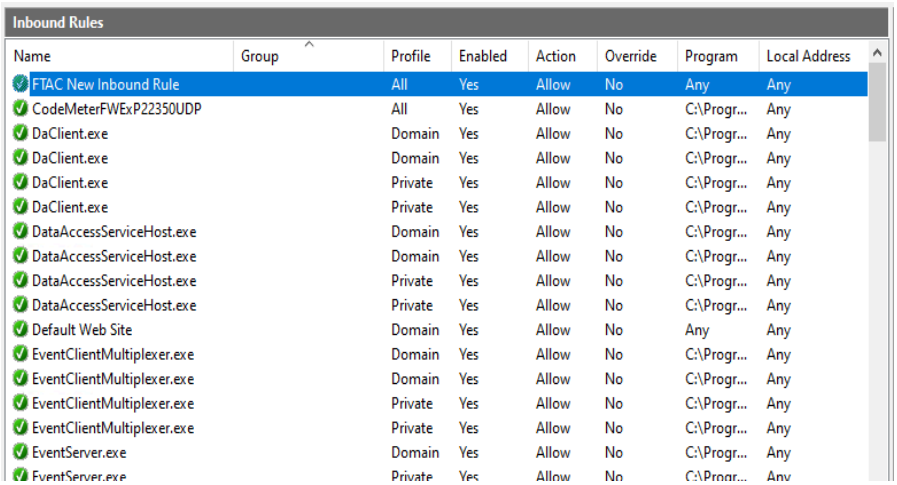


6. Follow the on-screen instructions until you get to the **Name** page.

7. In the **Name** box, enter the name for the new inbound rule, and then click **Finish**.



The new rule is shown in the list.



Name	Group	Profile	Enabled	Action	Override	Program	Local Address
FTAC New Inbound Rule		All	Yes	Allow	No	Any	Any
CodeMeterFWExP22350UDP		All	Yes	Allow	No	C:\Progr...	Any
DaClient.exe		Domain	Yes	Allow	No	C:\Progr...	Any
DaClient.exe		Domain	Yes	Allow	No	C:\Progr...	Any
DaClient.exe		Private	Yes	Allow	No	C:\Progr...	Any
DaClient.exe		Private	Yes	Allow	No	C:\Progr...	Any
DataAccessServiceHost.exe		Domain	Yes	Allow	No	C:\Progr...	Any
DataAccessServiceHost.exe		Domain	Yes	Allow	No	C:\Progr...	Any
DataAccessServiceHost.exe		Private	Yes	Allow	No	C:\Progr...	Any
DataAccessServiceHost.exe		Private	Yes	Allow	No	C:\Progr...	Any
Default Web Site		Domain	Yes	Allow	No	Any	Any
EventClientMultiplexer.exe		Domain	Yes	Allow	No	C:\Progr...	Any
EventClientMultiplexer.exe		Domain	Yes	Allow	No	C:\Progr...	Any
EventClientMultiplexer.exe		Private	Yes	Allow	No	C:\Progr...	Any
EventClientMultiplexer.exe		Private	Yes	Allow	No	C:\Progr...	Any
EventServer.exe		Domain	Yes	Allow	No	C:\Progr...	Any
EventServer.exe		Private	Yes	Allow	No	C:\Progr...	Any

Step 7: Configure Windows Authentication

Windows Authentication is a secure way of authentication that uses the username and the password of the user logged on to the operating system. In the communication secured with Windows Authentication mode, the username and the password are sent between the client and the server in a strongly hashed form.

Windows Authentication may be enabled in corporate networks that use Microsoft Active Directory services as well as other ways to identify users.

By turning on Windows Authentication mode you increase the security of the communication between the FactoryTalk AssetCentre server, client(s) and agent(s) and prevent unauthorized users from accessing the FactoryTalk AssetCentre server.

IMPORTANT: For the purposes of FactoryTalk AssetCentre, Windows Authentication mode should be enabled only in corporate networks that use Microsoft Active Directory services.

After you turn on Windows Authentication mode, the access to the page:

http(s)://assetcentre_server_full_name/rockwellsoftware/assetcentre

...will be secured from being accessed by anonymous users.

In order to access the page, the users will need to log on using their Windows username and password.

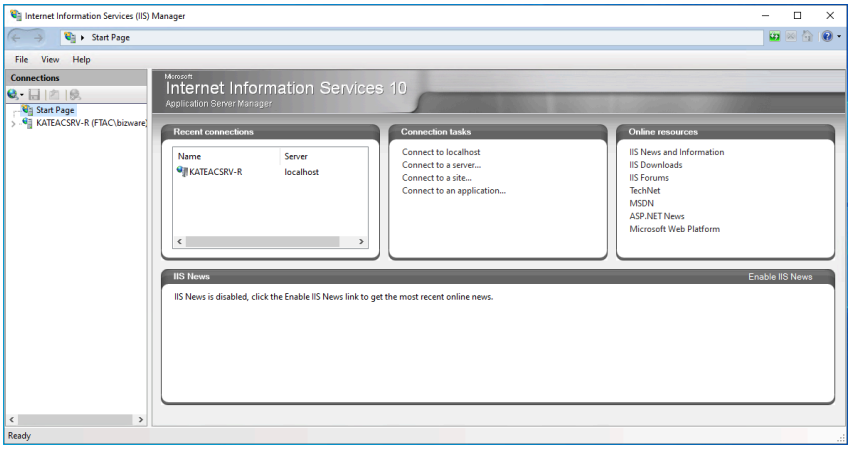
This section describes:

- Turn on Windows Authentication mode in Internet Information Services (IIS) on page 48

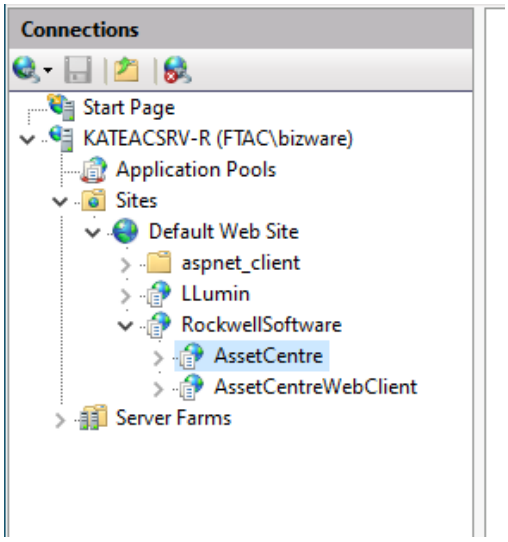
Turn on Windows Authentication mode in Internet Information Services (IIS)

To turn on Windows Authentication mode in Internet Information Services (IIS)

1. Open Internet Information Services (IIS) Manager on the FactoryTalk AssetCentre server computer.
   On Windows Server 2019, Windows Server 2016, and Windows Server 2012 R2:
   a. On the taskbar click .
   b. In the search box, type *inetmgr*, and then press **Enter**.
   c. Click the best match result.



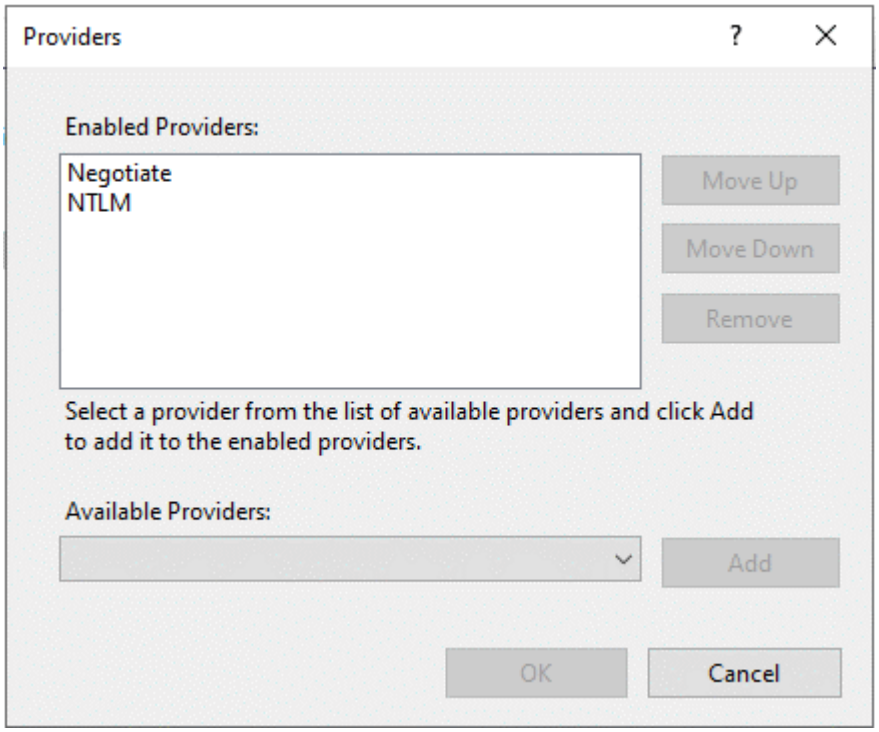
2. Under **Connections**, expand the tree, and then click **AssetCentre**.



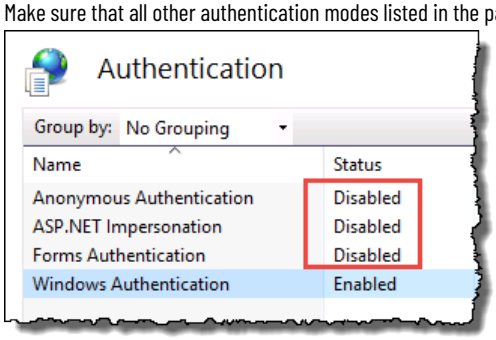
3. In **Features View**, double-click **Authentication**.
4. Under **Authentication**, click **Windows Authentication**.
5. Under **Actions**, click **Providers**.

   The **Providers** dialog box appears.
6. Make sure that you have the following providers selected in the order presented in the figure below.

   If these providers are not listed, select each of them in the list under **Available Providers**, and then click **Add**.



7. Make sure that all other authentication modes listed in the pane under **Authentication** are disabled.



IMPORTANT: When running FactoryTalk AssetCentre in a workgroup environment, Internet Information Services (IIS) **Anonymous Authentication** is enabled by default. **Anonymous Authentication** is required for proper operation of the system. To mitigate any security-related concerns, you must run FactoryTalk AssetCentre in a domain environment.

Quick Start 2: Design the asset tree

Everything that you do in FactoryTalk AssetCentre begins with an asset. The asset tree in the Asset View represents your plant including all the assets (anything from a device to a program to a procedure document) that you want to control, back up, or monitor. The asset tree provides you a method of organizing your plant assets in a logical fashion that makes sense to you (for example, by physical location, flow of materials, or machine type).

Quick Start steps for designing the asset tree

To design the asset tree, you must perform the following steps:

- Step 1: Plan the organization of your asset tree on page 51
- Step 2: Add assets to the asset tree on page 53
- Step 3: Change security settings for an asset on page 56

Step 1: Plan the organization of your asset tree

It is important to plan the organization of your asset tree in advance. The organization of the tree can impact your efficiency in applying security settings to assets and setting up Disaster Recovery schedules.

Tip: For background information to better understand the types of assets available in FactoryTalk AssetCentre and the use of the asset tree, see *About the Asset Catalog* and *About the Asset View* sections in the Help.

You must be in Design mode to edit the tree. Only one user in the system at a time can be in Design mode.

Assets are listed in alphabetical order in the tree.

Security considerations

When initially added, an asset inherits the security settings of the container in which it is placed (and a container inherits the security settings of the container in which it is placed). First, set security on the root. Then add containers under the root and set security for those containers. Then add the next level of assets and containers, and so on.

Schedule considerations

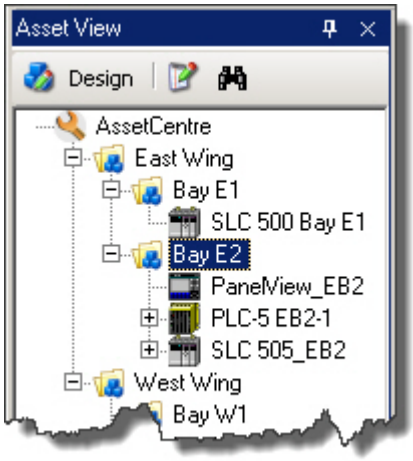
Schedules are set up by selecting the asset to be scheduled from the Asset View. You can only select one asset when creating a schedule. If you want the schedule to operate on multiple assets, place all those assets in a container in the asset tree. This container will be the starting point of the schedule. For example, if you want to backup the configuration files for a group of devices, place all those devices in a container in the Asset View.

Organization

When you initially set up the asset tree, you will have to decide what will be the most useful organization for you. The examples below show three possible organizations:

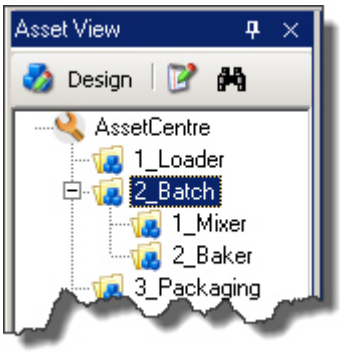
- **Physical location**

  In this arrangement, assets are organized by their physical location in your plant.



- **Flow of materials**

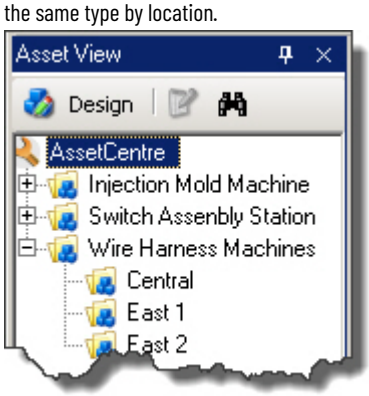
  In this arrangement assets are organized by the flow of materials in the production process. This may be particularly useful for continuous and batch processes.



Tip: Items in the tree are automatically organized alphabetically. If you want to force a certain order, use numbers in your asset names.

- **Machine type**

  In this arrangement, assets are organized by the type of machine. You might further organize machines of the same type by location.



Step 2: Add assets to the asset tree

Assets are the heart of FactoryTalk AssetCentre. Anything you want the FactoryTalk AssetCentre system to manage must be included in the asset tree. On first use, all assets to be managed must be added to the asset tree.

There are rules that govern the location of the different types of assets that you can add to the asset tree:

- The root may contain any type of asset.
  Best practice is to place only generic containers or folders directly under the root and use these to organize the tree in some useful way, perhaps by physical location or by function.
- A generic container may contain any type of asset.
- A device may contain files, binders, links, and folders.
- A folder or an asset inventory may contain files, binders, links, and folders.
- A file cannot contain any other assets.
- A link cannot contain any other assets.
- A binder cannot have any other assets placed under it.
  Files are initially placed in the binder by specifying the files to include in the Add Binder dialog box and checking the binder in, not by placing files under the binder in the asset tree.

Tip: When initially added, an asset inherits the security settings of the container in which it is placed (and a container inherits the security settings of the container in which it is placed). Take advantage of this inheritance by setting security for a container before placing assets inside that container. See Step 3: Change security settings for an asset on page 56.

To add an asset to the tree, you must have:

- **Switch to Design Mode** permission. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.
- **Create Children, Read, and Write** permissions for the container into which you want to add an asset. See Step 3: Change security settings for an asset on page 56.

Work online and offline

You can add devices to the asset tree whether your FactoryTalk AssetCentre client computer is connected to the devices via a network or not. When connected to the devices, however, you can automatically acquire device information by browsing for the device. This is the preferred method in this manual. The client computer must be connected to the FactoryTalk AssetCentre Server to add devices to the asset tree.

Enter device information manually when:

- the asset cannot be identified by Rockwell Automation or third party network browsers. For example, a device not supported by FactoryTalk AssetCentre or the network browser would not be found when browsing the network.
- the asset has not been placed on the control network yet.
- the client workstation is working offline so it does not have access to the control network.

To enter device information manually when you are disconnected from the device network, see Help. Select **Help > Contents**. Open the *Assets* topic and click the **Associate a device in the Asset View with a networked device** topic.

To add assets

1. To enter Design mode, on the Asset View toolbar, click the **Design** button (Keyboard users: Press **F3** to toggle Design mode on and off). If you cannot enter Design mode, see If you can't enter Design Mode on page 90.
2. Click an asset in the Asset Catalog and drag it to the desired location in the asset tree.

   Tip: Select the container into which you want to place the new asset and press **Ctrl-N**.

3. Enter the properties for the asset. For additional information about completing the fields for a particular asset type, click **Help**.
4. When the **(Device Type) Properties** dialog box is complete, click **OK**.

   Tip: To learn about additional asset tasks (for example copying, deleting, moving, or renaming assets), refer to Help. Select **Help > Contents**. Open the *Assets* topic and click the desired topic.

Use Asset Inventory to add assets to the asset tree

FactoryTalk AssetCentre supports a new asset type, **Asset Inventory**. The **Asset Inventory** asset can be used to scan physical automation devices on the network. When you run a backup or backup and compare schedule on an Asset Inventory asset, the Asset Inventory agent service scans the connected devices and computers on the network and stores unique identification information about hardware, firmware, and software in the backup data. Once you have the Asset Inventory scanning result, you can add new assets from the scanning result to the asset tree. This is very helpful especially the first time you build the asset tree. For information about schedules, see Step 4: Run schedules on page 64.

You need to open the **Asset Inventory** window first before adding assets to the asset tree. After running backup or backup and compare schedule on Asset Inventory, you can open the **Asset Inventory** window.

IMPORTANT: You must enter design mode to add new assets to the asset tree.

To open the Asset Inventory window

1. Select **View > Archive**, or click the **Archive** button.
2. In the asset tree, right-click the Asset Inventory backup file and select **Open**, or select the file in the asset tree and then at the top of the **Archive** tab, click the file link. The **File Retrieval Options** dialog box opens.
3. In the **File Retrieval Options** dialog box, keep the **Show in Asset Inventory Grid View** check box selected.
   - If you want to open the Asset Inventory window in read-only mode, click the **Get** button. In read-only mode, you cannot edit the additional information or commission date for device assets. A read-only copy of the file is retrieved to the current working folder on your computer.

     Tip: To open the Asset Inventory window in read-only mode, you can also right-click a version of Asset Inventory asset's backup data on the **History** tab of **Archive** and select **Asset Inventory View**.

- If you want to open the Asset Inventory window in editable mode, click the **Check Out** button. In editable mode, you can edit the additional information and commission date for device assets. A copy of the file is retrieved to the current working folder on your computer so that you can edit it.

> **Tip:** Clear the **Show in Asset Inventory Grid View** check box to get or check out a file as a normal backup file, without opening it in the Asset Inventory window.

4. The **Asset Inventory** window opens.

Once the **Asset Inventory** window opens, you can add new assets to the asset tree.

To add new assets to the asset tree

1. On the **Devices** tab in the **Asset Inventory** window, select the **Add** option.
2. Click the **SYNC** button.

> **Tip:** Clicking the **SYNC** button doesn't add any new assets to the asset tree. It identifies assets in the scanning result that are new compared to assets on the asset tree.
> Make sure you are in design mode to proceed.

After clicking the **SYNC** button, assets on the **Devices** tab that:

- exist in the asset tree with the same properties appear dimmed. The check boxes before them are automatically selected.
- exist in the asset tree with different properties appear dimmed. The check boxes before them are automatically selected. You can update these assets with different properties using the **Update** option.
- don't exist in the asset tree can be added to the asset tree. The check boxes before the new assets are available.

3. Select the check boxes before the assets you want to add to the asset tree. Click the Add button on the toolbar. The **Asset Inventory Add Asset Wizard** dialog box opens.
4. In the **Asset Inventory Add Asset Wizard - Step 1 of 4** dialog box, enter the required information before proceeding.
   - (Required) **Asset Type**
     Click in the **Asset Type** field and click the browse button . In the **Select Asset Type** dialog box, select the asset type. Click **Select**.

     > **Tip:** Device assets that can be mapped to the corresponding asset type have the **Asset Type** field automatically filled. Otherwise, the **Asset Type** field is empty.

   - (Optional) **Asset Name**
     Click in the **Asset Name** field and type the asset name. The name must be unique within the parent container. That is, you can have two devices with the same name in the asset tree, they just can't be in the same container.

Tip: You can leave the **Asset Name** field blank. FactoryTalk AssetCentre automatically creates the asset name according to the asset type appended with a number (like _2).

- (Required) **Asset Location**
  Click in the **Asset Location** field and click the browse button . In the **Select Asset Location** dialog box, select the node on the asset tree or click the **Add New Container** button to create a new generic container. Click **Select**.

  Tip: The level an asset is added to the asset tree depends on which node you select in the asset tree structure. By default, the asset is added in the root. If you select a container, the asset is added to the container. If you select a non-container asset, the asset is added to the structure at the same level as other assets.

After **Asset Type** and **Asset Location** are specified, click **Next.**

Tip: You cannot proceed to the next step without specifying **Asset Type** and **Asset Location**.

5. In the **Asset Inventory Add Asset Wizard - Step 2 of 4** dialog box, review the details of the new assets that will be updated to the asset tree. Click **Start**.

   Tip: To return to **Asset Inventory Add Asset Wizard - Step 1 of 4** to modify the asset type, name, or location, click **Back**.

6. In the **Asset Inventory Add Asset Wizard - Step 3 of 4** dialog box, a progress bar is shown while the adding operation is in process. If you want to cancel the operation, click **Cancel**. Usually, this step takes a very short amount of time unless you are adding a large amount of assets.
7. When the adding process is complete, you can see result of the adding operation in the **Asset Inventory Add Asset Wizard - Step 4 of 4** dialog box. Click **Finish**.
   To export the result, click **Export** to save the result as a .csv or .txt file.
   Assets added to the asset tree appear dimmed on the **Devices** tab with check boxes selected before them.

For more information about Asset Inventory, refer to the FactoryTalk AssetCentre Help. Select **Help > Contents**, and open the *About the Asset Inventory window* topic.

Step 3: Change security settings for an asset

Each asset in the asset tree has security settings controlling which users can perform what actions with that asset.

When initially added, an asset inherits the security settings of the container in which it is placed (and a container inherits the security settings of the container in which it is placed). That is, children inherit security permissions from their parents. You can assign explicit permissions to an asset, overriding the inherited permissions. You can also break the chain of inheritance for an asset so that it will not inherit permissions. For more information on inheritance see the FactoryTalk Security Help which is accessible from the **Security Settings** dialog box (referenced in the steps below).

If you move an asset, it retains its security settings. If you copy an asset, the copy does not retain the security settings of the original. Rather, the copy inherits the settings from its new parent container.

Tip: To change security settings for an asset, you must have **Switch to Design mode** permission. See Step 3: Set feature security for FactoryTalk AssetCentre on page 25. Keyboard users: Press **F3** to toggle Design mode on and off.

To change security settings for an asset

1. While in Design mode, right-click the asset in the asset tree and select **Security**.
2. On the **Permissions** tab of the **Security Settings** dialog box, select whether you want to set permissions by **User** or by **Action**.
3. In the top pane, select either the user or the action for which you want to set security for the selected asset.
4. In the bottom pane, select either the action (see the table below) or the user for which you want to set security and select or clear the **Allow** and **Deny** boxes accordingly. For more detailed information on using the dialog box and FactoryTalk Security, click **Help**.

This action...	Allows you to...
AssetCentre	
CheckIn does not require MoC workflow	Turn off Management of Change workflow when checking in selected files and binders associated with the selected asset. Select **Deny** box to require Management of Change workflow on check-in operation.
CheckOut - CheckIn	Check out or check in files associated with the selected asset.
CheckOut does not require MoC workflow	Turn off Management of Change workflow when checking out files and binders associated with the selected asset. Select **Deny** box to require Management of Change workflow on check-out operation.
Get	Get a copy of the file or files associated with the selected asset from **Archive**.
Label	Apply a descriptive Label to a version of a file associated with the selected asset in **Archive**.
Pin	Pin a version of a file associated with the selected asset.
Promote	Store an old version of the file as the most recent version.
Set Store Latest Version	Specify that only the most recent version of the file associated with the selected file asset should be retained.
Set Working Folder	Set the working folder for files associated with the selected asset.
Unblock MoC workflow	Reset the Management of Change workflow status of files and binders associated with the selected asset.

This action...	Allows you to...
Undo CheckOut	Undo a check-out operation for files associated with the selected asset. See Help. Select **Help > Contents**. Open the *Archive* topic and click the **Undo a check-out** topic.
Common	
Configure Security	Change security settings for the selected asset.
Create Children	Add assets underneath the selected asset (only if the selected asset is a container or device-type asset).
Delete	Delete the selected asset from the asset tree.
Execute	This setting is not applicable in this release of the FactoryTalk AssetCentre software.
List Children	Show children of the selected asset. If a user does not have this right, they will not be able to expand the selected asset to see assets that it contains. If you set this right to **Allow**, also set the **Read** right for this asset to **Allow**.
Read	Show the selected asset in the asset tree. Show the selected asset's properties.
Write	Change the selected asset's properties.

Tip: For more information on any of the Archive tasks listed in the first section of this table, see Quick Start 5: Open and edit files in Archive on page 75.

To learn about additional asset tasks (for example copying, deleting, moving, or renaming assets), refer to Help. Select **Help > Contents**. Open the *Assets* topic and click the desired topic.

Quick Start 3: Set up Disaster Recovery schedules

FactoryTalk AssetCentre allows you to create certain types of scheduled operations, the results of which (whether or not the operation completed successfully) can be e-mailed to the desired recipients. Currently, FactoryTalk AssetCentre offers two types of scheduled operations beyond scheduling searches — Device Monitor and Disaster Recovery. The Disaster Recovery capability ensures quick and accurate file recovery by verifying your devices' program and configuration files against protected master files.

A master file is a designated version of an asset's configuration data file. A master file may initially be uploaded from the physical device such as a controller, processor, or robot, or it may be saved directly from the programming software (such as Studio 5000 Logix Designer). A master file is added to FactoryTalk AssetCentre for backup in **Archive** and is required for some FactoryTalk AssetCentre functions such as Disaster Recovery Backup and Compare schedules (where the file in the physical asset is backed up and compared to the master file stored in Archive so the differences can be reported).

Disaster Recovery provides two types of operations:

- **Backup.** Stores a backup copy of files associated with a number of devices, including Rockwell Automation devices, Siemens S7 Controllers (STEP7), FTP devices including Robots, and more.
- **Backup and Compare.** Retrieves a copy of the files associated with a device asset. If differences are found and you choose to store the uploaded device files, the retrieved copy of files associated with the device asset are promoted as the new master file stored in **Archive**.
- **Change Detect.** FactoryTalk AssetCentre can monitor a v20 or higher ControlLogix asset for any changes in real-time.

Scheduled events for Rockwell Automation Logix 5000 processors will fail if FactoryTalk Security is enabled for that devices' programming software (RSLogix 5000 versions 16 and earlier). The problem is fixed in RSLogix 5000 versions later than 16. For RSLogix 5000 versions 16 and earlier, running scheduled events requires single sign-on for these versions. This issue does not affect other device's schedules (such as robots or Allen-Bradley PanelView devices). If a schedule contains both Logix 5000 processors and other devices, the scheduled event will only fail for those Logix 5000 processors for which FactoryTalk Security is enabled in the programming software; the event will complete for the other devices.

To configure the system so that scheduled operations will succeed even with security enabled in the RSLogix software, see Help. Select **Help > Contents**. Open the *Welcome to FactoryTalk AssetCentre* topic and click the **About the configuration for security-enabled RSLogix products** topic.

Also, activation is required for Disaster Recovery. For information regarding the activation required, see Help. Select **Help > Contents**. Open the Schedules topic and click the **Activation in FactoryTalk AssetCentre** topic.

Tip:

- To create scheduled searches instead of scheduled Disaster Recovery operations, see Step 2: Create a search on page 68.

Asset Inventory asset requires a separate activation to work with disaster recovery

Quick Start steps for setting up schedules

To set up schedules, you must perform the following steps:

- Step 1: Set up Agent Groups and agent computers in them on page 60
- Step 2: Create a schedule for the desired Disaster Recovery operation on page 61
- Step 3: Set up recipient lists for schedule results on page 63
- Step 4: Run schedules on page 64

Step 1: Set up Agent Groups and agent computers in them

FactoryTalk AssetCentre uses agents to perform Disaster Recovery operations. Agents are programs that communicate with the FactoryTalk AssetCentre server and perform tasks on behalf of the 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.

FactoryTalk AssetCentre Agent Groups is a plug-in that helps you manage the agents into groups. With this plug-in, the agent computers that are connected to the same FactoryTalk AssetCentre server do not need to have the same configuration. This plug-in allows you to:

- Create agent groups, assign agent computers to the agent groups, and identify an agent group for an asset
- Assign backup and compare schedule tasks on an asset to the agent computers that belong to the asset's agent group
- Monitor the status of agent computers in the **Agent Status** pane, the **Agent Group Creation and Agent Assignment** pane, and the **Assets per Agent Group** pane.

This manual covers operations configuring Agent Groups and agent computers within those groups. To add a physical agent computer into FactoryTalk AssetCentre system instead of managing agent computers in agent groups, see Help. Select **Help > Contents**. Open the *Administration* topic and click the **Add an agent computer** topic.

To learn about more Agent Groups configurations (for example, delete and rename an agent group, edit agent group properties, delete an agent computer, edit agent computer properties, move an agent computer, and move an asset from one agent group in to another) not covered in this manual, refer to Help. Select **Help > Contents**. Open the *Agent Groups* topic and click the desired topic.

Create an agent group

Agent Groups plug-in manages the usage of agents. By default, there is one System Default agent group, which cannot be renamed or deleted. The System Default agent group is used for scheduled searches, and by default for any Disaster Recovery tasks. If you need to create a new agent group, follow the steps below.

To create an agent group

1. If you are not in it, enter **Design mode**.
2. On the Menu bar, click **View > Agent Groups** (or click the **Agent Groups** button).
3. Click the **Add Agent Group** button  on the **Agent group Creation and Agent Assignment** toolbar. The **Add an Agent Group** dialog box opens.

Tip: You can also right-click anywhere in **Agent Group Creation and Agent Assignment** pane and select **Add Agent Group**.

4. In the **Add an Agent Group** dialog box, enter the name and the description for the agent group. Click **OK**.

Tip: The maximum number of agent groups which you can create depends on your licensed agent group capacity. By default, you can create one agent group in addition to the existing System Default agent group.

Create an agent computer

You can create an agent computer in Agent Groups to monitor the physical agent computers.

To create an agent computer

1. If you are not in it, enter Design mode.
2. On the **Menu** bar, click **View > Agent Groups** (or click the **Agent Groups** button).
3. Select an agent group, or an agent computer under the group where you want to add the agent computer to. Otherwise, the agent computer will be created under System Default agent group.
4. Click the **Add Agent Computer** button on the **Agent Group Creation and Agent Assignment** toolbar. The **Add an Agent Computer** dialog box opens.

   Tip: You can also right-click the agent group and select **Add Agent Computer**.

5. In the **Add an Agent Computer** dialog box, enter the name, location and the description for the agent computer.
   You can click the **Connect** button to check whether the FactoryTalk AssetCentre Server service can connect to the agent computer.
6. Click **OK**.

Step 2: Create a schedule for the desired Disaster Recovery operation

You can set up either a Backup or Backup and Compare Disaster Recovery operation when you create a schedule.

Tip: To create schedules, you must have **Create a new schedule**, **Edit a schedule**, and **Command a schedule** permissions. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.

To create a schedule

1. In the asset tree, select the container or device for which you want to schedule an operation.

   Tip: Multiple assets can be included in the same scheduled operation by creating a scheduled operation for a container. For example, a single container may contain multiple controllers. Scheduling a Backup operation for the container backs up all of the devices in that container in one operation.

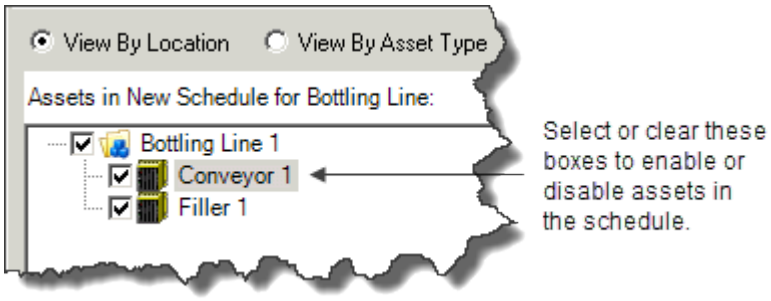
   For all of a device's schedule properties to be available for modification, make sure each device to be added to a schedule has its Configuration Data defined in the device's properties. The Configuration Data will be used to specify the master file for a Disaster Recovery schedule. See Step 2: Add assets to the asset tree on page 51.

2. Select **View > Schedules** (or click the **Schedules** button).
3. Click the **New** button (Keyboard users: Press **Ctrl-N**).
4. Complete the **New Schedule Wizard: Step 1 Schedule Properties** dialog box and then click **Next**.

   You must enter a unique name for the schedule.

   If you have more than one e-mail address you want to include, separate the addresses in the **Completion Email List** field with semicolons (;), or, if you have **View Address Book** permission, select the contacts or groups from the FactoryTalk Address Book. The report sent from this field is the End of Schedule Report. For more information about the End of Schedule report, see Step 2: Set up recipient lists for schedule results on page 63. For more information on a particular field, click **Help**.
5. Complete the **New Schedule Wizard: Step 2 Recurrence Pattern** dialog box and click **Next**.

   To create a start time that does not begin on the hour or half hour, type the time (and AM or PM) in the field. Be aware that it is possible to create a schedule that will not run on a specific date. For example, if you choose to have a schedule run on the 31st day of every month, it will not execute in months that do not have 31 days. For more information on a particular field, click **Help**.
6. Complete the **New Schedule Wizard: Step 3 Operation Properties** dialog box. In the tree on the left side of the dialog box, check boxes appear selected next to each asset in the schedule. Clear a box to not include that asset in the schedule.

   Properties for the selected device appear on the right side of the dialog box. For help completing the shown properties for the selected device, click **Help**.

   The schedule you created will be active unless you clear the **Activate the Schedule** box. For more information on a particular field, click **Help**.
7. Click **Finished**.

Step 3: Set up recipient lists for schedule results

There are two different types of schedule reports you can send to specified recipients when a schedule completes:

- **End of Schedule report.** This general report summarizes information such as a Backup and Compare schedule's start and stop times and whether there were any differences between the contents of the physical device and the asset's master file stored in **Archive**. This report is set up through the **Schedules** tab.
- **Backup report** or **Backup and Compare report.** These more detailed, operation-specific reports include information such as asset and hardware details, the agent computer that ran the schedule, and the name and location of the master file used in a Compare. For Backup and Compare operations, the Backup and Compare report indicates whether or not differences were found. To include the detail of what these differences were, attach the Compare Report file to the e-mail notifications. Both the Backup report and Backup and Compare report are set up through an asset's scheduled operation properties.

Tip: To send schedule results, you must have **Command a schedule** and **Edit a schedule** permissions. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.

Send an End of Schedule report

To send an End of Schedule report at the end of a schedule

1. On the **Schedules** tab, click in the desired schedule's **Completion Email List** field and then click the **Browse** button. The schedule must be inactive to change the e-mail address, that is, the Active check box must be cleared.
2. Complete the **Contacts** dialog box.
3. To avoid scrolling the entire list, begin typing the last name of the contact or the name of the group. You can double-click the contact or group to add it to the list of recipients at the bottom of the dialog box. For information on adding a new contact, see Step 4: Add contacts to the Address Book on page 28.
4. Click **OK**.

Send an operation-specific report

To send a Backup report or Backup and Compare report at the end of a schedule

1. On the **Schedules** tab, select the schedule containing the asset for which you want to send a report.
2. To select the asset associated with the schedule and complete its e-mail (and other) operation properties, see Help. Select **Help > Content**. Open the *Schedules* topic and click the **Modify scheduled operation properties** topic.

Tip: After a Backup and Compare operation completes, if no differences are found, the Compare Report file is attached to e-mail notifications if, in the device properties under **Attach Report to email**, you set the **Event Completed** field to **True**. If differences are found, the Compare Report file is attached to e-mail notifications if you set the **Event Compare Differences Detected** field to **True**. See Help. Select **Help > Content**. Open the *Schedules* topic and click the **Modify scheduled operation properties** topic.

Step 4: Run schedules

You can activate a schedule so that it runs at its next scheduled time. You did this automatically if you selected the **Activate the Schedule** box in the wizard when you created the schedule. You can also activate schedules from the **Schedules** tab.

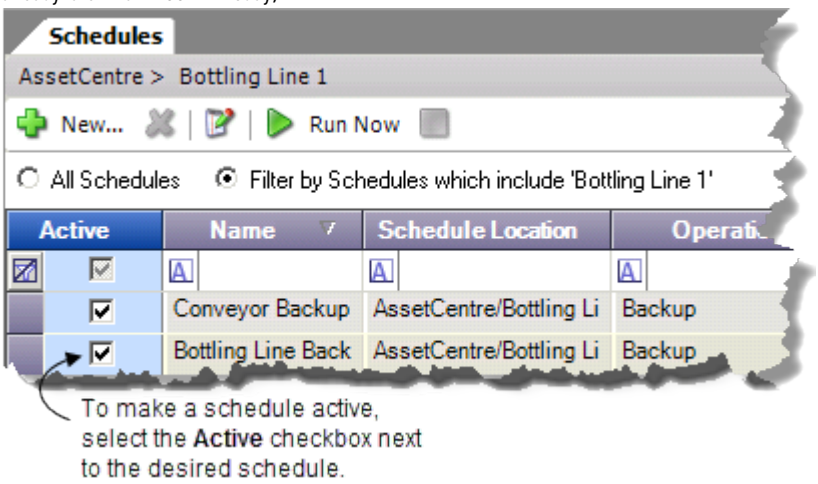
To run a schedule immediately, you can run schedules manually. Choosing to run a schedule manually immediately runs the schedule and sends e-mail notifications to your recipient list instead of waiting for the operation's next run time. Running a schedule manually does not affect that schedule's next run time.

Tip: To run schedules, you must have **Command a schedule** permission. To activate schedules, you must have **Edit a schedule** permission. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.

Run schedules by making them active

To activate an existing schedule that you did not activate when you created the schedule

- On the **Schedules** tab next to the schedule you want to activate, select the **Active** check box. If the selected schedule is to run daily at 4:00 P.M., the schedule will run next at 4:00 P.M. today (or 4:00 P.M. tomorrow if it is already later than 4:00 P.M. today).



Run schedules manually

To run a schedule immediately without waiting for its next scheduled run time

1. You cannot manually run a schedule that has Running status, so on the **Schedules** tab, select a schedule with Waiting to Run status.
2. Click the **Run Now** button.
3. Once the schedule is run manually, it returns to Waiting to Run status. If running the schedule manually causes the schedule to run through its start time, FactoryTalk AssetCentre does not attempt to run the previously scheduled operation. Instead, the message *The schedule has tripped but didn't run because it is*

already running is logged to the AssetCentre Event Log and the schedule waits to run again at its next start time.

Tip: When you move, copy, or delete assets in the asset tree, the schedules for those assets are also moved, copied, or deleted. To learn about the impacts moving, copying, and deleting assets have on schedules, refer to Help. Select **Help > Contents**. Open the *Schedules* topic and click the **Schedule changes when assets are moved, copied, deleted or renamed** topic.

To learn about additional schedule tasks (for example, stopping schedules, changing schedule run times, setting asset defaults for schedules, or renaming, filtering, and deleting schedules) not covered in this manual, refer to Help. Select **Help > Contents**. Open the *Schedules* topic and click the desired topic.

Quick Start 4: View and search logs

FactoryTalk AssetCentre offers three different logs:

- **Event Log.** This log shows database information regarding events that occur in the system. Events are generally system-initiated, for example an upload occurred, or a scheduled task completed. Event records are generated by FactoryTalk-enabled products.
- **Audit Log.** This log shows database information regarding actions users perform in the system, such as making edits to an Studio 5000 Logix Designer project or opening or closing such a software product. Audit records are generated by FactoryTalk-enabled products.
- **Diagnostics & Health Log.** The Diagnostics and Health Log provides information about the condition of automation devices. For example, a monitoring software product, such as Automatic Device Descriptive Analytics (ADDA) function and RSNetWorx MD, detects a problem with a device on the automation network. It reports the problem and logs the information in the Diagnostics and Health Log.
  FactoryTalk AssetCentre uses the same FactoryTalk Directory server with FactoryTalk Alarms and Events. When installing AssetCentre Diagnostics Connector, FactoryTalk AssetCentre will log Automatic Device Descriptive Analytics (ADDA) events from FactoryTalk Alarms and Events and displays them as Diagnostics and Health logs in version 10.00.00 and later. FactoryTalk View Studio Enterprise version 12.00.00 and Studio 5000 Logix Designer v33.00.00 are required to be installed for this function. The Automatic Device Descriptive Analytics (ADDA) logs are not editable.

Tip: Initially, only previously existing data appears in the Diagnostics and Health Log if that data was imported from the RSMACC Network Health Solution. This data is not updated by FactoryTalk AssetCentre. New data is logged in the Diagnostics and Health Log only if RSNetWorx MD is installed on your system or ADDA functionality is available.

You can search for and show specified records from one log at a time. For example, you could search for log entries where a specific user performed a task on a specific computer.

You can perform searches in two different manners:

- **Scheduled searches** are used to execute a search on a recurring basis and works well for detecting specific conditions and user behaviors in log data. For instance, you can create a scheduled search to detect unsafe programming practices among your maintenance staff by searching the Audit Log for edits made to program files at the end of each shift. You can run scheduled searches manually to show search results immediately. Scheduled search results can be delivered via e-mail. Search results can be printed and saved in .PDF or CSV format.
- **Unscheduled searches** are used for one-time purposes or when there is an immediate need, such as searching the Audit Log to determine if anyone has made a change in a control system that was working fine a few hours ago, but now is down and preventing production.

Tip: In addition to searching logs, you can search the Archive History Log, the Archive Check Out Status, and the Asset Extended Property.
To perform a quick search without complex conditions instead of the full searches described in this manual, see Help. Select **Help > Contents**. Open the *Logs* topic and click the **Perform a Quick Search on a log** topic.

Quick Start steps for viewing and searching logs

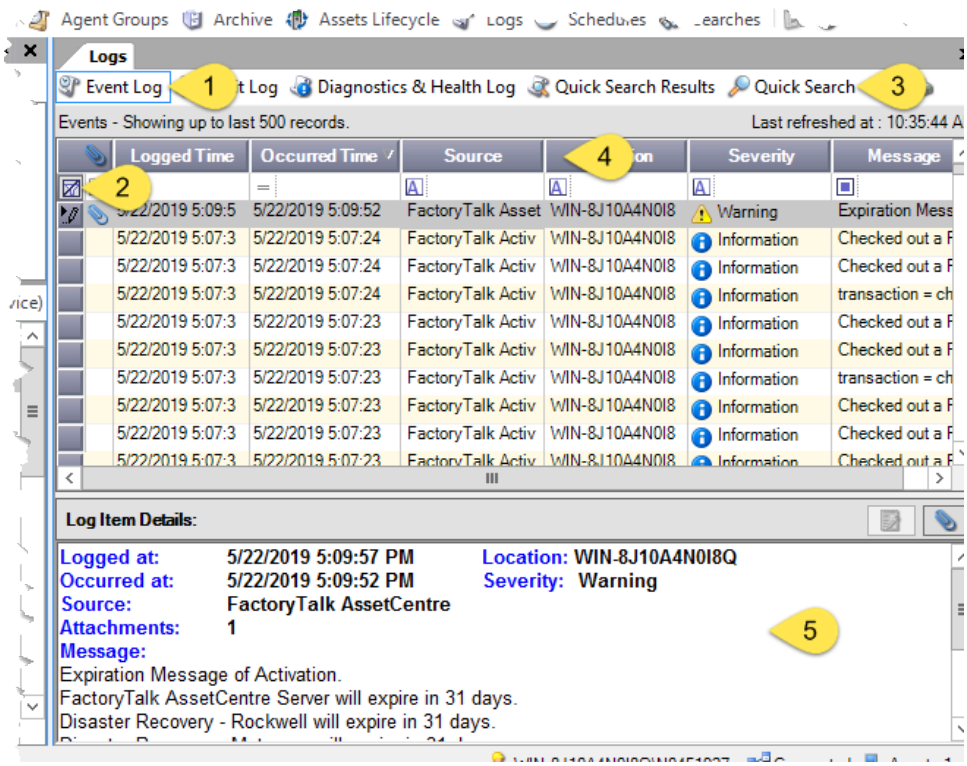
To set up searches, you can view logs and then perform the steps to set up and run searches:

- Step 1: View logs on page 67
- Step 2: Create a search on page 68
- Step 3: Set search security on page 72
- Step 4: Run searches on page 73
- Step 5: View and print search results on page 73

Step 1: View logs

Viewing a particular log shows the latest entries for that log only. If no data appears in the log, see If no data appears in a log on page 95.

Tip: To view the desired log, you must be granted **View Audit Log**, **View Event Log**, or **View Diagnostics and Health Log** permission. If you do not have rights to view the desired log, the message *You do not have permission to view the selected log* will appear. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.



1. When you click a log button, the newest log entries for the selected log appear.
2. Use the filter fields to limit the items shown in the log. To filter fields, see Help.

   Click **Help > Contents**. Open the *Logs* topic and click the **Filter log records** topic.
3. To perform a quick search on a log, see Help.

   Click **Help > Contents**. Open the *Logs* topic and click **Perform a quick search** on a log topic.
4. Use the column headings to sort and arrange the log data. See Help.

Click **Help > Contents**. Open the *Logs* topic and click the **Sort and arrange log records** topic.

5. When you click a log entry, its contents is shown here in the **Details** pane.

To view logs

1. Select **View > Logs**.
2. To view the desired log:
   - Select **View > Audit Log** (or click the **Audit Log** button).
   - Select **View > Event Log** (or click the **Event Log** button).
   - Select **View > Diagnostics & Health Log** (or click the **Diagnostics & Health Log** button).

     To learn about the data fields shown in each log, click **Help** while the desired log is shown.
3. To show the contents of a log entry in the **Log Item Details** pane, click the log entry.
4. To update the shown log with any additional records, click the **Refresh** button . This updates the records in the log with events that occurred in your system since the log display was last refreshed. The log display is automatically refreshed at the rate determined in the client software settings. To change the number of seconds between automatic refreshes, see Help. Select **Help > Contents**. Open the *Logs* topic and click the **Change the refresh rate and number of shown records** topic.

Tip: To learn about additional log tasks (for example, sorting, filtering, printing, showing attachments, or changing the status of a Diagnostics & Health Log record) see Help. Select **Help > Contents**. Open the *Logs* topic and click the desired topic.

Step 2: Create a search

Use FactoryTalk AssetCentre Searches to show specified records of the Event Log, Audit Log, Diagnostics and Health Log, the Archive History Log, the Archive Check Out Status, or the Asset Extended Property. Search results can be based on any column of data in a record and are generated based on complex conditions that you set.

Tip: To create unscheduled searches, you must have **Create a Search** permission. To create scheduled searches, you must also be granted **Create a Schedule**, **Edit a Schedule**, **View a Schedule**, and **Command a schedule** permissions. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.

To create a search

1. Select **View > Searches** (or click the **Searches** button).
2. Click the **New** button (Keyboard users: Press **Ctrl-N**).
3. Complete the **Search Properties** page of the **New Search Wizard** dialog box. Be sure to enter a unique name for the search and select its data source (the record you want to search). For information to complete any of the fields, click **Help**.
4. To create an unscheduled search for the selected record, click **Finished** and go to Step 6.
5. To create a scheduled search to run at a later time, click **Schedule**, complete the **New Schedule Wizard: Step 2 Timing Properties** dialog box.

   To create a start time that does not begin on the hour or half hour, type the time (and AM or PM) in the field.

   Be aware that it is possible to create a search that will not run on a specific date. For example, if you choose

to have a search run on the 31st day of every month, it will not execute in months that do not have 31 days. For more information on a particular field, click **Help**. When the dialog box is complete, click **Finished**.

6. To configure how the search results will appear, complete the **Source and Display** tab. If you do not complete this tab, the default format will be used for the search results. The following table lists this tab's buttons and options:

Button or graphic	Description
Move Column Left	Move the selected column one column to the left. Columns appear in the search results report in the order in which they are shown here. The columns of data available vary depending on the record you are searching. Sort precedence is determined by column display order. For example, if you want to sort the results by user name and then logged time, place **User Name** as the first column and **Logged Time** as the second column.
Move Column Right.	Move the selected column one column to the right. Columns are sorted in the order in which they are shown. The columns shown vary depending on the record you are searching. For example, if you want to sort the results by user name and then logged time, place **User Name** as the first column and **Logged Time** as the second column.
Show all Columns	Show all of the selected record's columns in the search results. This is helpful if you have de-selected some of the columns and want to re-select all of the columns without doing so manually.
Hide all Columns	Show none of the selected record's columns in the search results. This is helpful if you want to show very few columns because you can deselect all of the columns and then select only those that you want.
Show (row heading)	Show the record's selected data fields in the search results. In the **Show** row beneath the column heading, select the checkbox for each field of data to show in the search results.
Sort (row heading)	Select the **shown** data fields (above) to sort the search results. In the **Sort** row beneath the column heading, click the cell to select the desired sort order (Ascending, Descending, or No Sorting). Columns are sorted in the order in which they are shown. To change column order, use the **Move Column** buttons described above.
Width(%)	Specify the column width of data fields in percentage in the search results. In the **Width(%)** row, click the cell to enter an integer as the percentage of width for a column. The total of each column's width percentage can be equal to or less than 100 percent, but cannot exceed

Button or graphic	Description
	100 percent. When the total of width percentage is less than 100 percent, all the columns except for the last one will keep their width percentage. The last column will expand its width by the percentage that is missing from 100 percent against the total of the rest column widths. For example, there are a total of four columns, each of whose column width is 10 percent. In the search results, the first three columns take the space of 10 percent of the entire row, while the last column will take the space of 70 percent of the entire row, even though it's specified as 10 percent.
Display all rows	In the search results, show all records of the source log that meet the search criteria.
Display only the first (number) rows	In the search results, limit the matching records shown up to the number indicated.
Tabular style	Tabular style arranges each record with column-style headings.
Card style	Card style arranges each record with row-style headings.
Portrait	The search report is shown in portrait orientation.
Landscape	The search report is shown in landscape orientation.

7. To create or modify the search criteria for the selected search definition, complete the **Conditions** tab. The conditions you create determine the records that will appear in the search results. For example, you can create a condition to include only those search results logged before or after a specific date and time. If you do not complete this tab, there will be no conditions placed on the records returned in the search results. That is, the search will return all records.

   How FactoryTalk AssetCentre Evaluates Search Conditions

   Evaluating ungrouped conditions is straightforward. FactoryTalk AssetCentre evaluates conditions from top to bottom. Place conditions in the order you want them evaluated by using the **Move Up** and **Move Down** buttons.

   More complicated expressions can have a different meaning depending on how the elements are grouped. With no grouping, FactoryTalk AssetCentre evaluates first the AND operators and then the OR operators. Conditions grouped with parenthesis override this, so anything in parenthesis is evaluated first.

   Example 1:

   Occurred Time Equals '7/22/2007'

   And Username Equal To Sally

   Or Username Equal To Harry

   And Resource Equal To Line1Computer

   In this case, FactoryTalk AssetCentre evaluates first the ANDs and then the OR, so it is as if the expression were written:

   (7/22/2007 AND Sally) Or (Harry AND Line1Computer)

   Meaning: Include anything Sally did on July 22. Include anything Harry did on the Line1Computer.

   Example 2:

   Occurred Time Equals '7/22/2007'

And (Username Equal to Sally

Or Username Equal to Harry)

And Resource Equal To Line1Computer

The following table lists the **Conditions** tab's buttons for creating conditions:

Button or graphic	Description
New Condition	Create a new condition on which to search. The **New Condition** dialog box fields and options that appear vary depending on the log data for which you are creating the condition.
Properties	Change the properties of the selected condition. The **Condition Properties** dialog box fields and options that appear vary depending on log data for which you are creating the condition.
Delete	Delete the selected condition.
(	Place a left parenthesis at the beginning of the selected condition. Use parenthesis to group conditions to control the way the entire expression is evaluated.
)	Place a right parenthesis at the end of the selected condition. Use parenthesis to control the way the entire expression is evaluated.
And	Place an **And** in front of the selected condition. By default, each condition has an **And** in front of it. Use **And** when you want results to appear in the search results only if both conditions are met.
Or	Place an **Or** in front of the selected condition. Use **Or** when you want an item to appear in the search results if either one or the other condition is met.
Not	Place a **Not** in front of the selected condition. Use **Not** when you want to exclude log records that meet the condition.
Move Up	Move a condition higher in the list of shown conditions. While FactoryTalk AssetCentre does evaluate conditions in a specific order (parenthetical conditions before **And** conditions, and **Or** conditions last), it does also evaluate those conditions from top to bottom.
Move Down	Move a condition lower in the list of shown conditions. FactoryTalk AssetCentre evaluates the conditions in the order they appear.

8. When the conditions are created, click **Save (Search Name)**.
9. To quickly see the search results, view the **Preview** tab.

10. To format and modify the recipient list for scheduled search results as well as set the time zone for the computer running the search, complete the **Scheduled Search Operation** tab. For information on completing this tab, click **Help**.

> **Tip:** The **Scheduled Search Operation** tab only appears when you select a scheduled search definition on the **Searches** tab. To add a schedule to an existing search definition, see Help. Select **Help > Content**. Open the *Searches* topic and click the **Create or modify a search schedule** topic.

Step 3: Set search security

You can set security for a search definition to determine which users can set security for, save, execute, and delete the search.

> **Tip:** To modify security settings for a search, you must be granted **Configure Security** permission. In addition, you must be granted the **Read** and **Write** permissions. See the steps below.
>
> Do not deny yourself **Read** permission or you will no longer be able to show the **Security Settings for (Search name)** dialog box to change security for the selected search definition. Generally, all FactoryTalk AssetCentre users are initially granted each permission related to search security. To prevent other users from changing your search definition, deny them **Configure Security** permission.

To set search security

1. Select **View > Searches**, or click the **Searches** button.
2. On the **Searches** tab, select the search for which you want to change security.
3. Select **Edit > Security** (or click the **Security** button at the bottom of the **Searches** tab).
4. Complete the **Security Settings for (Search name)** dialog box. To do this, select the user and then set that user's permissions for the selected search definition, and then click **OK**. To add a user for whom to set security for the selected search definition, at the top of the dialog box, click **Add**.
   The **Common** permissions that apply to searches are:

This permission:	Allows the selected user to:
Configure Security	modify the Read, Write, Execute, and Delete settings for this search
Read	show these security settings for the this search
Write	save this search
Execute	run this search
Delete	delete this search

5. Click **OK**.

Step 4: Run searches

To run searches, you can either activate scheduled searches or manually run a scheduled or unscheduled search. You may want to run a scheduled search manually if you do not want to have to wait for the search's next run time. Running a scheduled search manually does not affect that search's next scheduled run time.

Time Zones

A scheduled search may actually run on a different computer than your client computer. If some computers in your FactoryTalk AssetCentre system are in different time zones, this could confuse the time-related information in your search results. To set the time zone for a computer that is to run a selected scheduled search, see Help. Select **Help > Contents**. Open the *Searches* topic and click the **About modifying and saving searches** topic. To set the default time zone for a computer that is to run scheduled searches, click the **Set scheduled search options** topic.

Tip: To run a search, you must be granted **Execute** permission. See Step 3: Set search security on page 72. To activate and deactivate scheduled searches, you must be granted **Command a Schedule** permission. To run a search immediately, you must be granted the appropriate permission for the type of search you are going to run — **View Audit Log**, **View Event Log**, or **View Diagnostics & Health Log** permission. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.

Make a search active

To activate scheduled searches so that they run at their next scheduled run time

1. Select **View > Searches**, or click the **Searches** button.
2. Next to the searches you want to activate, select the **Active** check box. If the selected search is scheduled to run daily at 4:00 P.M., the search will run next at 4:00 P.M. today (or 4:00 P.M. tomorrow if it is already later than 4:00 P.M. today).

Run searches manually

To run a scheduled or unscheduled search immediately

1. Select **View > Searches**, or click the **Searches** button.
2. On the **Searches** tab, select the search row.
3. Click the **Run Now** button.

Tip: To perform a quick search without complex conditions instead of the full searches described in this manual, see Help. Select **Help > Contents**. Open the *Logs* topic and click the **Perform a Quick Search on a log** topic.

Step 5: View and print search results

Once you run a search, the results appear on a separate tab. Use the **Report (Search Name)** tab to view and navigate the results of a search you have run, as well as export and print the search's results.

Tip: To preview a search instead of showing the report, click the **Preview** tab.

To view and print search results

1. After you run the search, click the **Report (Search Name)** tab.
2. Use the **Report** tab's toolbar to navigate, export, and print the results. The following table lists the **Report** tab's toolbar buttons and provides a brief description of each button's functions.

Button	Description
Export Report	Export the search results to the desired location on your hard drive. Results are saved in PDF format.
Print Report	Print the search results. Complete the **Print** dialog box and click **Print**.
Go To First Page	Show the first page of the search results.
Go To Previous Page	Show the previous page of the search results.
Go To Next Page	Show the next page of the search results. If the cover page of the report is shown, click this button to see the first page of the report containing the actual search results returned.
Go To Last Page	Show the last page of the search results.
Go To Page	Show a specific page of the search results by entering the page number.
Zoom	Show the search results as larger or smaller using different percentages.

3. To close the **Report** tab, click the **Close** button on the right side of the tab.

Tip: To learn about additional search tasks (for example, filtering, modifying, renaming, sorting, or deleting searches), refer to Help. Select **Help > Contents**. Open the *Searches* topic and then click the desired topic.

Quick Start 5: Open and edit files in Archive

The FactoryTalk AssetCentre Archive is a version control tool that helps manage asset files. Use Archive to keep secure copies of asset configuration files, pin file versions as masters, track versions, and control file use so that only one person at a time can modify a file.

Tip: When archiving FactoryTalk AssetCentre's File asset file size is limited by Microsoft SQL Server to 2GB. It is not possible to archive files larger than 2GB. FactoryTalk AssetCentre's Binder asset can store collections that exceed 2GB. Extreme care should be exercised when archiving Binders with sizes that exceed 2GB as this can negatively impact database performance.

Using Archive, you can:

- **Keep automation files securely archived.** FactoryTalk AssetCentre's Archive uses Microsoft SQL Server to safely store archived files in a relational database. When you store assets in **Archive**, you reduce your need to back up work and prevent accidental deletion of asset data.
- **Ensure that files are modified by one user at a time.** Designate a file you want to work on and ensure no other users can work on the same archived file until your changes are saved in the Archive database.
- **Version files. Archive** is similar to a library. To use an archived file, check it out and when you are done, check it in again. As with a library book, only one person can check out a file at a time. The difference is that you can make changes to the checked-out file, so the library keeps a copy of each version of the file. This way, if someone needs to see a version of a file before it was changed, the earlier version can still be obtained. See Step 2: Check out a file for editing on page 77 and Step 3: Check in a file on page 78.
- **Keep an existing version available for use while development continues.** Pin the version of a file that you want other users to use. Development can continue on that file and each revision is saved in **Archive**, but if another user gets the file, they get the pinned version. Also, scheduled operations use the pinned version of the master file. For information about pinning files, refer to Help. Select **Help > Contents**. Open the *Archive* topic and click the **Pin or unpin files or binders** topic.

  Tip: To add files to **Archive**, all you need to do is add assets and their associated files to the asset tree. See Step 2: Add assets to the asset tree on page 53.

Quick Start steps for managing files in Archive

To work with files in Archive:

Step 1: Set a working folder

To edit a file or binder stored in the Archive database, you must place a copy of the file or binder on your local hard drive. The location on your hard drive is called a **working folder**. Without a working folder, you cannot retrieve files or binders from the Archive database. When you set a working folder for an asset, you set the working folder for all files and binders within the asset.

Types of Working Folders

FactoryTalk AssetCentre has two types of working folders:

- **System working folder**. The location where images of files and binders will be stored when you check out the files for editing or get a read-only version of a file. When the system working folder is set, this working folder applies to all files and binders in an asset, and all FactoryTalk AssetCentre users. For example, if you set a system working folder located at **C:\BOTTLING PLANT** for an asset called **East Conveyor**, when a user gets or checks out the **East Conveyor** asset, the path **C:\BOTTLING PLANT** is created on that user's local computer and will contain all of the **East Conveyor** asset's files. Each asset can only have one system working folder. Any user with Configure System Archive Working folders permission can set a system working folder for an asset.
- **Personal working folder**. The working folder that overrides the system working folder. When you set a personal working folder in Archive, that folder is created on your computer and remains your personal working folder for an asset's files and binders. Other users use the system working folder until they set their own personal working folders. If users set personal working folders for assets on one computer and then launch FactoryTalk AssetCentre on another computer and want to use the same personal working folders, they must set the working folders again.

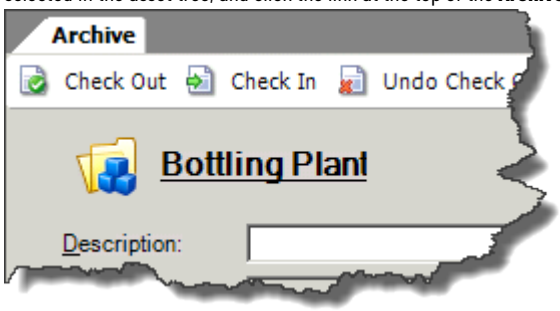
Tip: When you check out, check in, or get a file or binders, you have the option of overriding the current working folder with a temporary location. See Step 2: Check out a file for editing on page 77, Step 3: Check in a file on page 78, or Step 4: Get a read-only version of a file on page 80.

To set a system working folder, you must have **Configure System Archive Working Folders** permission. To set a personal working folder (or to override a working folder when checking in, checking out, or getting a file or binder), you must have **Configure Personal Archive Working Folders** permission (see Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25) and **Set Working Folder** permission for the asset (see Step 3: Change security settings for an asset on page 56).

To set a working folder

1. Select **View > Archive** (or click the **Archive** button).
2. In the asset tree, select the asset containing the files and binders for which you want to set the working folder.
3. On the **Archive** tab, after the **Working folder** field, click **Set**.
4. Complete the **Set Working Folders** dialog box. The current working folder for the selected asset appears at the bottom of this dialog. If you set a personal working folder for yourself, it will override the system working folder. However, all other users will use the system working folder for the asset's files.

5. Click **OK**.
6. To show the contents of a working folder in Windows Explorer, right-click the asset in the asset tree and select **Open Working Folder**. To show the contents of a working folder from within **Archive**, with the asset selected in the asset tree, and click the link at the top of the **Archive** tab:



Step 2: Check out a file for editing

Before modifying any file stored in **Archive**, you must retrieve a copy of the file to the current working folder on your computer. Retrieving a file and making it available for editing is called checking out a file. Only one user at a time can check out a file. If a file is checked out by another user, you must wait until that user checks in the file again before you can check out and edit the file. However, you can get a file that is checked out by another user so that you can view it in your project. For information about getting a read-only version of a file, see Step 4: Get a read-only version of a file on page 80.

When you check out an asset, you automatically check out all of the files within the asset. You have the option of checking out any files located in subfolders of the asset.

FactoryTalk AssetCentre makes it easy to locate a file you check out by duplicating the asset tree structure in folders and subfolders on your hard drive. A check out duplicates the asset tree structure from the container or folder where you set the working folder to the container or folder where the file you checked out is located.

Tip: To check out files, you must have **CheckOut - CheckIn** permission for the asset. See Step 3: Change security settings for an asset on page 56.

To check out a file or folder of files

1. In the asset tree, select the asset containing the file(s) to check out. Once you select an asset in the asset tree, you can also select the file to check out on the **Archive** tab.
2. On the **Archive** tab, click the **Check Out** button.

   Tip: You can also right-click an asset in the asset tree (or a file on the **Archive** tab after you select an asset in the asset tree) and select **Check Out**.

3. Complete the **Check out** dialog box by selecting any of the following options:

This option	Performs the following:
Get local copy	Select this option to check out the version of a file from the Archive database and place it in your working folder; any version of the file in your current working folder will be

This option	Performs the following:
	overwritten by the version checked out from the Archive database. Clear this option to preserve the file version in your current working folder. This is useful when you've performed a Get to retrieve a writable version of the file to your current working folder and now want to back up changes you make to that file in **Archive**. Clearing this option allows you to continue editing the version in your current working folder and back up those changes in **Archive** the next time you check in the file. For information about getting a version of a file, see Step 4: Get a read-only version of a file on page 80.
Recursively check out files from subfolders	Normally when you check out an asset, you check out all of the files within the asset. Select this option to also check out all of the files located in subfolders of the asset. This option is only available if you select an asset that contains files in the asset tree.
Override working folders	Select this option to override your current working folder and check out files to a temporary working folder used for this one check out operation only. Type the path of the temporary working folder (you can type the path of a new temporary working folder and the working folder will be created automatically), or click **Browse** to select the path of the working folder you want to use temporarily. To override the working folder, you must have **Configure Personal Archive Working Folders** permission (see Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25) and **Set Working Folders** permission (see Step 3: Change security settings for an asset on page 56).

4. Enter an optional comment to summarize the work. This is helpful when tracking work done in a file. The maximum length for a comment is 2500 characters.
5. Click **OK**. A checkmark appears next to the file link and the check out location of the file appears on the **Archive** tab.

Tip: You can undo a check-out. This reverts a file or an asset's files to the previous version and marks the file as no longer checked out. For information about undoing a check-out, refer to Help. See **Help > Contents**. Open the *Archive* topic and click the **Undo a check out** topic.

Step 3: Check in a file

Once edits are completed to a checked-out file, return it to the Archive database. Checking in a file saves a new version so that changes are backed up and protected in the Archive database. When you are working on a file over a long period of time, it is good practice to check in the file daily.

If you check in an asset, you automatically check in all files within the asset. You have the option of checking in any files located in subfolders of the asset as well.

You can only check in a file that someone else has checked out if you have permission.

Tip: To check in files, you must have **CheckOut - CheckIn** permission (see Step 3: Change security settings for an asset on page 56). To check in a file someone else has checked out, you must have **Override Archive CheckIn** permission (see Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25).

To check in a file or folder of files

1. In the asset tree, select the file or the asset containing the files to check in.
2. On the **Archive** tab, click the **Check In** button.

   Tip: You can also right-click the asset or file in the asset tree (or a file on the **Archive** tab if you select an asset in the asset tree) and select **Check In**.

3. Complete the **Check in** dialog box. The following options are available:

This option:	Performs the following:
Check in and delete the local copy	Check in the file so the changes are backed up in the Archive database, and delete the copy of the modified file from your current working folder.
Check in but keep a local copy	Check in the file so the changes are backed up in the Archive database, and keep a read-only copy of the file in your current working folder. When you check out this file again, you will have to decide whether or not you want to overwrite the file in your working folder. This option is only available when you have **Override Removal of Local Copies** permission. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.
Keep checked out	Check in the file so the changes are backed up in the Archive database, but immediately check out the file to yourself again so that you can keep editing it.
Recursively check in files from subfolders	Normally when you check in a device or container, you check in all of the files within that asset. Select this option to also check in any files located in subfolders of the device or container. This option is only available if you select a device or container in the asset tree.
Override check-out location with path	Select this option to check in files from a temporary working folder instead of your current working folder. This is useful if you made a copy of a file and placed it in a location other than the working folder to which you originally checked out the file. To save any changes to the

This option:	Performs the following:
	file you copied, click **Browse** and select the location from which you want to check in the file. To override the working folder, you must have **Configure Personal Archive Working Folders** permission (see Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25) and **Set Working Folders** permission (see Step 3: Change security settings for an asset on page 56).

4. Enter a comment to summarize the work. This is helpful when tracking work done in a file. The maximum length for a comment is 2500 characters.

> **Tip:** Depending on the value assigned to the **Allow Empty Comment at Check In** security setting for a particular user or group, typing a comment may or may not be obligatory upon the check-in.

5. Click **OK**. The checkmark is removed from the asset or file on the **Archive** tab. The check-in action, as well as the date and time the file is checked in, appears on the **History** tab. To learn about the **History** tab, see Help. Select **Help > Contents**. Open the *Archive* topic and click the **View file history** topic.

Step 4: Get a read-only version of a file

Use **Get** to retrieve a read-only copy of a file or the files in an asset to your current working folder. **Get** allows people who need to use the file (but don't need to edit it) to get the necessary file version. For example, if you want to copy rungs from another ladder program, you can get that program (even if another user has the file checked out), copy the rungs, and then paste them into your file. Getting a file eliminates accidental changes to the master file.

You can get the current version of a file or the files in an asset, or you can select an earlier version. You can also get a file that is marked as checked out, even if you have the file checked out.

FactoryTalk AssetCentre makes it easy to locate a file that you get by duplicating the asset tree structure in folders and subfolders on your hard drive. Getting a file duplicates the asset tree structure from the container or folder where you set the working folder to the container or folder where the file you get is located.

The date and time a file is retrieved appears in the file history. To learn about how Archive sets dates and times for files, see Help. Select **Help > Contents**. Open the *Archive* topic and click the **Date and time settings** topic.

> **Tip:** To get read-only versions of files, you must have **Get** permission. See Step 3: Change security settings for an asset on page 56.

To get the current version of a file

1. In the asset tree, select the file or asset containing the files to retrieve and click the **Get** button.
2. Complete the **Get** dialog box. The following options are available:

This option:	Performs the following:
Get writable copy	Retrieve an editable instead of read-only copy of the file. This retrieves the most recent or pinned file version into the current working folder.
Recursively get files from subfolders	Place a copy of all files located in subfolders of the selected device, container, or folder into the current working folder. This option is only available when you select a device, container, or folder in the asset tree. It is not available if you select a file.
Overwrite checked-out files	Overwrite any versions of the file in the current working folder with the version you are retrieving from the Archive database.
Override local name	Select this option to provide another name for the file to be placed in the working folder. Select the check box and type a name for the file. When you click **OK**, the file is placed in the working folder with the specified name.
Override working folders	Select this option to retrieve the file into a temporary working folder, instead of the current working folder, for this **Get** operation only. Type the exact path of the temporary working folder or click **Browse** to select the working folder location where you would like to store the retrieved files. To override the working folder, you must have **Configure Personal Archive Working Folders** permission (see Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25) and **Set Working Folders** permission (see Step 3: Change security settings for an asset on page 56).

3. Enter an optional comment to summarize the work. This is helpful when tracking work done in a file. The maximum length for a comment is 2500 characters.
4. Click **OK**. The file appears in your current working folder. The **Get** action is shown in the file history unless you select to show version-related activities.

Tip: To get a specific (labeled) version of a file, see Help. Select **Help > Contents**. Open the *Archive* topic and click the **Label a file or binder version** and **Get a read-only version of a file or binder** topics.

You can also get a pinned version of a file, if there is one. For more information, see Help. Select **Help > Contents**. Open the *Archive* topic and click the **Pin or unpin files or binders** topic.

To learn about additional Archive tasks (for example, promoting, or deleting files from the FactoryTalk AssetCentre Archive), also refer to Help. Open the *Archive* topic and click the desired topic.

Step 5: Open a file for viewing

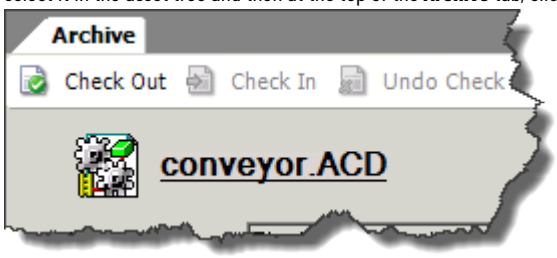
If you have set a working folder for a file, you can choose to open that file to view its contents. This is helpful when you want to make sure you have selected the correct file. Opening a file also allows you to copy its content.

When you open a file and have already placed a local copy of that file in the working folder by either checking out or getting the file, the software program associated with the file opens the file. To set a file association for a file, see Help. Select **Help > Contents**. Open the *Archive* topic and click the **Set file associations** topic.

If you do not have a local copy of the file in your working folder when you choose to open the file, FactoryTalk AssetCentre prompts you to either check out the file for editing (see Step 2: Check out a file for editing on page 77) or Get a read-only version of the file (see Step 4: Get a read-only version of a file on page 80). This allows you to place a local copy of the file in your working folder and have the associated software program open the file at the same time.

To open a file

1. In the asset tree, right-click the file and select **Open Working Folder**. You can also double-click the file or select it in the asset tree and then at the top of the **Archive** tab, click the file link:



   If there is a copy of the file in your working folder, the file's associated software program launches and opens the file.

   Tip: If you do not have a working folder set for the file's asset, the message dialog box *Unable to Launch File* appears instead of the **File Retrieval Options** dialog box. See Step 1: Set a working folder on page 76.
   If there is not a copy of the file in your working folder, complete the **File Retrieval Options** dialog box to place the file in your working folder and then either checking out or getting the file. For more information about checking out a file, see Step 2: Check out a file for editing on page 77. For more information about getting a file, see Step 4: Get a read-only version of a file on page 80.
   If the message *No program is associated with the specified file for this operation*, see If you cannot open a file on page 95.

2. Close the file when you are done viewing it. Any changes you make to an open file will not be saved unless you check out the file from **Archive**. See Step 2: Check out a file for editing on page 77.
   If the automatic check-in feature is enabled, after done editing the file that checked out from **Archive**, you will be asked if you need to save a new version. For more information on automatic check-in, see Help. Select **Help > Contents**, and navigate to the **Archive** topic and then to the **Check in files or binders automatically** topic.

Step 6: Initiate a Management of Change workflow to check out a file for editing

You can use Management of Change to supervise the check-out and check-in operations.

Prerequisites

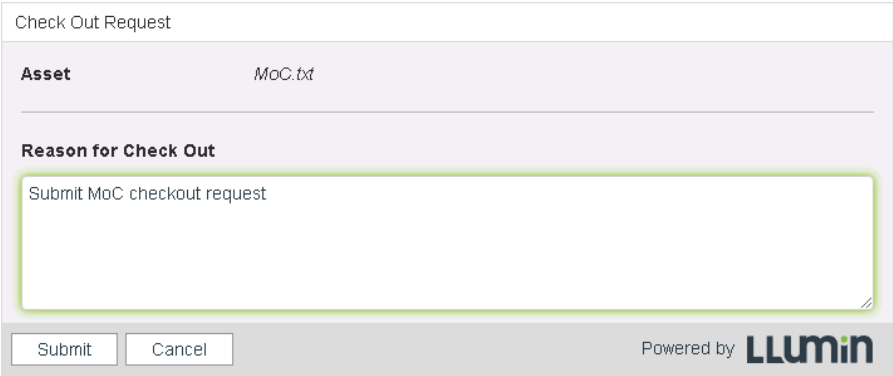
- You must have **CheckOut - CheckIn** permission for the asset.
- **CheckOut does not require MoC workflow** permission is denied.
- Administrator has configured electronic workflow rules for the application.

To initiate a Management of Change workflow for check-out operation

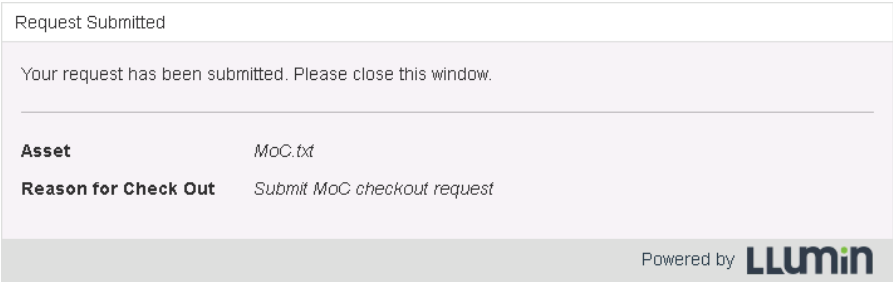
1. In the asset tree, select the asset containing the file(s).

   Once you select an asset in the asset tree, you can also select the file to check out on the **Archive** tab.
2. On the **Archive** tab, select **Check Out**.

   Tip: You can also right-click an asset in the asset tree (or a file on the **Archive** tab after you select an asset in the asset tree) and select **Check Out**.
3. In the **Check Out Request** dialog box, enter the reason for check-out.

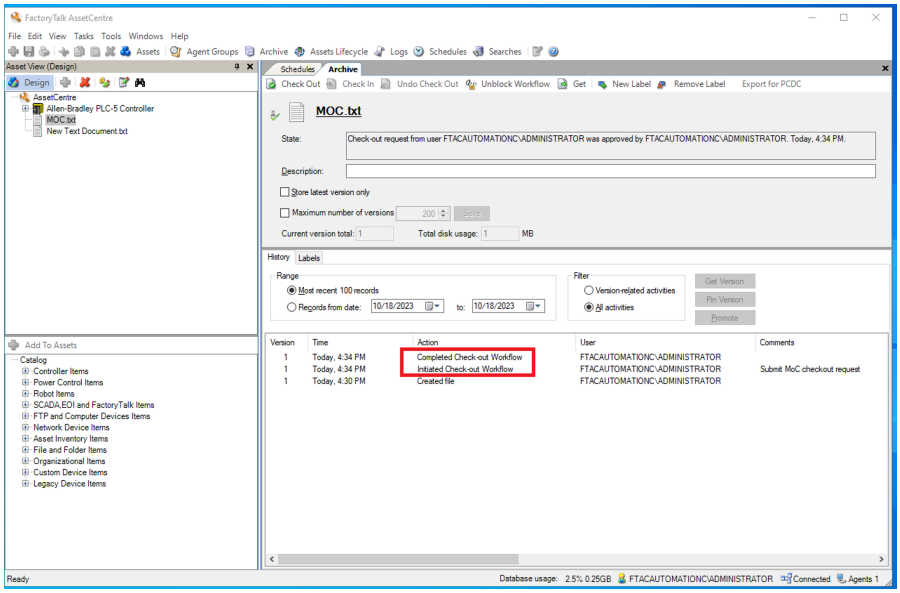


4. Select **Submit**.



5. (optional) To reset the file's and binder's status, select **Unblock Workflow**.

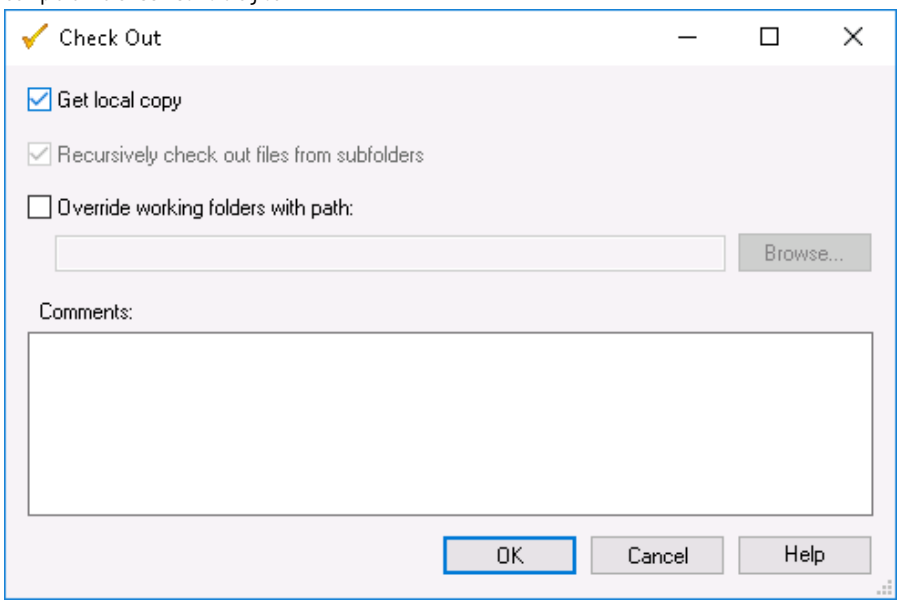
You must have the **Unblock MoC workflow** permission.



Tip:

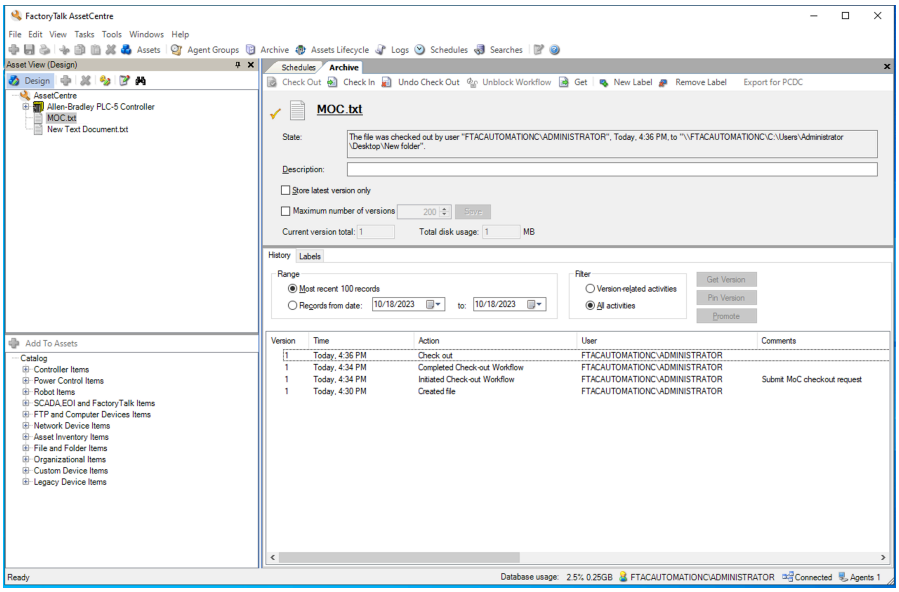
- Other users cannot perform check-out until the submitted request is approved or rejected, or **Unblock Workflow** is used.
- After the request is approved by Management of Change administrators, you can do the following steps.

6. On the **Archive** tab, select **Check Out**.
7. Complete the **Check out** dialog box.



8. Click **OK**.

   A checkmark next to the file or binder in the **Archive** tab indicates the item is checked out. The location and the action statuses of the checked out item is also shown on the **Archive** tab.



Quick Start 6: Manage Rockwell Automation hardware lifecycle

Assets Lifecycle provides the lifecycle information for Rockwell Automation hardware devices in the system. It shows the lifecycle status in the form of a list that allows you to easily manage the hardware lifecycle and make decisions about which device needs upgrade or replacement. In order to take advantage of this feature, the Asset Inventory for disaster recovery license is required.

Quick Start steps for managing Rockwell Automation hardware life cycle

To manage the life cycle of Rockwell Automation hardware devices:

- Step 1: Synchronize lifecycle status on page 86
- Step 2: Refresh lifecycle status on page 87
- Step 3: View detailed lifecycle status on page 87

For more information, refer to Help. Select **Help > Contents**. Open the *Assets Lifecycle* topic and click the desired topic.

Step 1: Synchronize lifecycle status

Synchronize lifecycle information in the FactoryTalk AssetCentre server and client with the data on the Rockwell Automation lifecycle website. For more information about securely accessing the Rockwell Automation lifecycle website from your OT zone-based FactoryTalk AssetCentre Server, please refer to this document *Cloud Connectivity to a Converged Plantwide Ethernet Architecture* in Rockwell Automation Literature Library. You can synchronize the lifecycle information of either assets or asset inventory in the AssetCentre server. The lifecycle synchronization is recommended to run during server null time (time when no scheduled tasks or user interaction is taking place) if possible. With the synchronization process being based on product ID or catalog number quantity, it can take some time to complete based on the total collected, and will require server resources during runtime.

Synchronizing the Assets and Asset Library requires an Internet connection.

To synchronize lifecycle status of assets

1. Select **View > Assets Lifecycle**, or click the **Assets Lifecycle** button.
2. Click the **Asset** tab.
3. Click **Sync**. A progress bar shows.
4. After the progress, the lifecycle information is updated to the FactoryTalk AssetCentre database and the lifecycle status is updated on the asset list.

To synchronize lifecycle status of asset inventory

1. Select **View > Assets Lifecycle**, or click the **Assets Lifecycle** button.
2. Click the **Asset Inventory** tab.
3. If you have used an asset inventory file before and don't want to use another version, skip to Step 7.
   If this is the first time to use an asset inventory file, the **Asset Inventory** tab is empty. You need to specify an RAAI file. On the right of the **Asset Inventory File** box, click ...
4. On the left of the **Select File** dialog box, select an RAAI file in the asset tree view.

5. On the right of the **Select File** dialog box, select an RAAI file version.
   - Filter by label
     Select this option to filter the RAAI files by label.
   - Filter by version
     Select this option to filter the RAAI files by version.
   - Latest version
     Select this option to use the latest version of the RAAI file.
6. Click **OK**.
7. Click **Sync**. A progress bar shows.
8. After the progress, the lifecycle information is updated to the FactoryTalk AssetCentre database and the lifecycle status is updated on the asset list.

Step 2: Refresh lifecycle status

Refreshing lifecycle information only updates the data on the AssetCentre client with the AssetCentre server. You can refresh the lifecycle information of either assets or asset inventory on the AssetCentre client.

This operation doesn't need an Internet connection.

To refresh lifecycle status of assets or asset inventory

1. Select **View > Assets Lifecycle**, or click the **Assets Lifecycle** button.
2. To refresh assets, click the **Asset** tab.
   To refresh asset inventory, click the **Asset Inventory** tab.
3. Click **Refresh**. A progress bar shows.
4. After the progress, the lifecycle information is updated from the FactoryTalk AssetCentre database to the client and the lifecycle status is updated on the asset list.

Step 3: View detailed lifecycle status

In the asset list on the **Asset** or **Asset Inventory** tab, you can view the detailed lifecycle status of devices, including:

- Device: product ID of a device.
- Description: product description of a device.
- In Device: the existing firmware revision in the device.
- Most Current Minor Release: the most current minor firmware revision available for the device, including its Release Notes, Product Notices, or Product Service Advisories.
- Most Current Release: the most current major firmware revision available for the device, including its Release Notes, Product Notices, or Product Service Advisories.
- Lifecycle Status: lifecycle status of a device.
- Last Update Date: the last time when the lifecycle status was updated.
- Discontinued Date: the announced discontinued date.
- Replacement Category: the nature of the replacement.
- Replacement Product: the recommended product to replace the current one.

To view detailed lifecycle status

1. Select **View > Assets Lifecycle**, or click the **Assets Lifecycle** button.
2. Click the **Asset** tab or the **Asset Inventory** tab.

3. Click a device in the list. A window of lifecycle information opens.

> **Tip:** For devices in the Active Mature, End of Life or Discontinued status, you can expand the **Replacement Information** to view the recommended replacement product and replacement category.

4. To close the window, click anywhere outside the window.

> **Tip:** If you want to reopen the lifecycle window of an asset you just closed, click another asset then click the one whose lifecycle window you want to open again.

Lifecycle statuses

In the asset list of Assets Lifecycle, there are seven statuses appended to each asset, showing their current lifecycle stage.

Status	Description
None	The Rockwell Automation device was found in the PCDC, but the product lifecycle status is set to None.
Active	The most current fully supported Rockwell Automation device offering within a product category.
Active Mature	Rockwell Automation device is fully supported and available for sale. The product is stable; future efforts will be focused on sustainment and maintenance. A newer device or product family within the product category may be available; customers will often gain value by migrating to the newer offering.
End of Life	Rockwell Automation has announced a discontinuation date for the device. Customers need to actively execute their migrations and last time buys. The Rockwell Automation device is generally available for sale or download until the discontinued date, although outages on specific devices within a product family may occur prior to that date.
Discontinued	Product is no longer being sold, manufactured, or procured. Repair or exchange services may still be available.
Multiple Status	There are several product lifecycle statuses found in the PCDC for the Rockwell Automation device.
Not Available	The Rockwell Automation device was found in the PCDC, but there is no configured product lifecycle state.
Non Rockwell	Only available for FactoryTalk AssetCentre Web Client The device is not a Rockwell Automaton product. There is no product lifecycle information available for non-Rockwell Automation devices.

Troubleshoot

Troubleshoot the FactoryTalk AssetCentre client

For additional troubleshooting information see Help.

This section includes the following topics:

If the client fails to start

- Make sure the client computer is connected to the network and the network is operational.
- Make sure your 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).
- Make sure the correct FactoryTalk Directory is specified. On the machine running the client, select **Start > Rockwell Software > Specify FactoryTalk Directory Location**.
- If your computer is not authenticated by a domain controller (for example, if it is part of a workgroup instead), turn off the FactoryTalk single sign-in feature. For information about single sign-in, see the FactoryTalk help file. Select **Start > Rockwell Software > FactoryTalk Help**.
- Make sure the server location setting is correct. On the server computer go to **Start > Rockwell Software > FactoryTalk AssetCentre 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 go to **Start > Rockwell Software > FactoryTalk AssetCentre Data Source Configuration**.
- If the message *The client and server versions are incompatible* appears when you attempt to start the FactoryTalk AssetCentre client, and the FactoryTalk AssetCentre software installed on the server has been updated, then the software on the client needs to be updated. See the *FactoryTalk AssetCentre Installation Guide* for information on updating the client and agent software.
- If the message *Error initializing FactoryTalk AssetCentre* appears when you attempt to start the FactoryTalk AssetCentre client, your FactoryTalk AssetCentre server may have failed (or you may have lost your network connection to the server) or the client computer may not be part of the FactoryTalk Directory. If you have checked the server (as directed earlier in this list), try adding the client computer to the FactoryTalk Network Directory. From another computer that has access to the FactoryTalk Directory (the FactoryTalk AssetCentre server, for example), use the FactoryTalk Administration Console to add the computer to the FactoryTalk Directory.
- If you are using a firewall, make sure your firewall is configured properly to permit access to the FactoryTalk AssetCentre Server. See the *FactoryTalk AssetCentre Installation Guide* for information on firewall settings.

Tip: For information on port requirements, see the topic **Network requirements** in the *FactoryTalk AssetCentre Installation Guide*. Select **Help > Installation Guide** to open the guide.

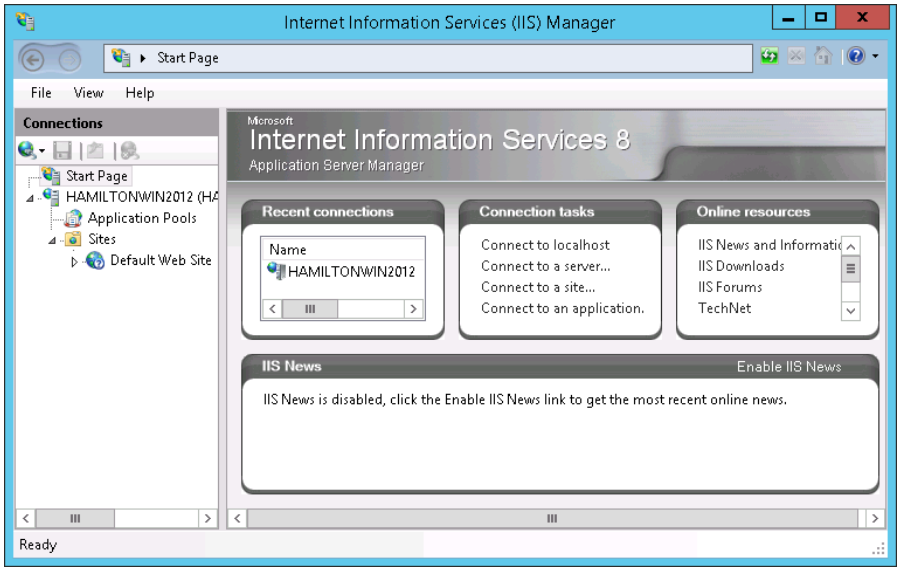
If the client cannot communicate with the server

If a client cannot connect to the server (if the server status in the Status Bar is Disconnected) or the client cannot connect to capabilities located on the network (for example, if logs won't show or schedule information does not appear) check the following:

- client computer is connected to the network and the network is operational.
- FactoryTalk AssetCentre Server service, IIS, and SQL Server are all on-line. See below for more information on IIS.
- server location setting is correct. On the server computer select **Start > Rockwell Software > FactoryTalk AssetCentre Server Settings**. The server location must be set in this utility, not in the FactoryTalk Administration Console.
- SQL Connection is set properly. On the server computer select **Start > Rockwell Software > FactoryTalk AssetCentre Data Source Configuration**.

To make sure IIS is running on the server computer

1. Click **Start**.
2. On the taskbar, click .
3. In the search box, type *inetmgr*, and then press **Enter**.
4. Click the best match result.



5. In the right pane, under **Connections**, expand the server node.
6. Expand **Sites**, and then click **Default Web Site**.
7. In the right pane, under **Actions**, check if the site is running.

   If it is not, start it:

   - In the right pane, under **Manage Web Site**, click **Start**.

If you cannot enter Design Mode

- You might not have the appropriate permissions to enter Design mode. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.
- Only one user in your system can be in Design mode at a time. If another user is in Design mode, you will not be able to enter Design mode until that user exits Design mode.

- The server might not be activated. To see if the server is activated, select **Help > About**. Under **Components**, select **FactoryTalk AssetCentre Server Features**, and then below that select **FactoryTalk AssetCentre Server**. Activation information for the server appears on the right.
  If the server needs to be activated, in the **About** dialog box, click **Refresh**. If the server is still not activated, see the FactoryTalk Activation Manager Help for more information.
- The server, database, or FactoryTalk Directory may be offline or unavailable.

If you cannot connect to Allen-Bradley PanelView Plus devices

FactoryTalk Linx, formerly known as RSLinx Enterprise, must be installed on the client computer to communicate with Allen-Bradley PanelView Plus operator interfaces. See the *FactoryTalk AssetCentre Installation Guide* for information on installing FactoryTalk Linx.

FactoryTalk View ME must be installed on the agent computer to communicate with Allen-Bradley PanelView Plus operator interfaces. This is a separate installation that is not included as part of the FactoryTalk AssetCentre installation.

If you cannot connect to Allen-Bradley MobileView devices

FactoryTalk Linx, formerly known as RSLinx Enterprise, must be installed on the client computer to communicate with Allen-Bradley MobileView operator interfaces. FactoryTalk Linx must be version 5.71 or higher. See the *FactoryTalk AssetCentre Installation Guide* for information on installing FactoryTalk Linx.

FactoryTalk View ME must be installed on the agent computer to communicate with Allen-Bradley MobileView operator interfaces. This is a separate installation that is not included as part of the FactoryTalk AssetCentre installation.

Troubleshoot Schedules

This section includes the following topics:

If a schedule did not run

You must make a schedule active for its status to be Waiting to Run or Running. See Step 3: Run schedules on page 64.

If a schedule no longer appears on the Schedules tab

Any user with **Delete a schedule** permission can delete any schedule from FactoryTalk AssetCentre. You do not have to create a schedule to be able to delete that schedule. If you or another FactoryTalk AssetCentre user has permission and deletes an asset from the asset tree, the schedule will be deleted. This occurs if an asset is the starting point (the top level asset) of a schedule. The schedule cannot be retrieved. You must add the device to the asset tree again and

then recreate the asset's schedule. For more information about deleting assets, see Help. Select **Help > Contents**. Open the *Assets* topic and click the **Delete an asset** topic.

If an asset is missing from a schedule

If you or another FactoryTalk AssetCentre user deletes an asset from the asset tree, that asset will be removed from any schedules in which it was included. To restore that asset to the schedule, you would have to add the asset back into the container in the asset tree that is the starting point of the schedule. When you add the asset back to the container, it will appear in the schedule again, but it will have the default operation properties set under **Tools > Options**. If these are not the desired properties, you can change the properties for that asset in that schedule. See Help. Select **Help > Contents**. Open the *Schedules* topic and click the **Modify scheduled operation properties** topic.

My schedule contains extra devices that I don't want in the schedule

Devices meeting the necessary criteria will automatically be added to a scheduled container as soon the device is added to the container in the asset tree. To exclude assets from a schedule, disable the assets you do not want to include in the schedule. See Help. Select **Help > Contents**. Open the *Schedules* topic and click the **Enable or disable scheduled assets** topic.

If a scheduled operation fails

- Certain operations, such as Backup and Compare, may fail if the operation requires that a device has a master file and it does not. To select which version of the file in **Archive** will serve as the master file to the device, see Help. Select **Help > Contents**. Open the *Assets* topic and click the **Add an asset** topic.
- The FactoryTalk Linx or RSLinx Classic path on the client computer where the device's addressing information was set may not match the FactoryTalk Linx or RSLinx Classic path on the agent computer running the schedule. All computers in the FactoryTalk AssetCentre system must have the same FactoryTalk Linx or RSLinx Classic drivers and paths.
- Scheduled events for Rockwell Automation Logix 5000 processors will fail if FactoryTalk Security is enabled for that devices' programming software (RSLogix 5000 versions 16 and earlier). The problem is fixed in RSLogix 5000 versions later than 16. For RSLogix 5000 versions 16 and earlier, running scheduled events requires single sign-on for these versions. This issue does not affect other device's schedules (such as robots or Allen-Bradley PanelView devices). If a schedule contains both Logix 5000 processors and other devices, the scheduled event will only fail for those Logix 5000 processors for which FactoryTalk Security is enabled in the programming software; the event will complete for the other devices.
  To configure the system so that scheduled operations will succeed even with security enabled in the RSLogix software, see Help. Select **Help > Contents**. Open the *Schedules* topic and click the **About the configuration for security-enabled RSLogix products** topic.

You will be unable to create a schedule for an asset that is to be the starting point of a schedule if the asset isn't supported by the scheduled operation. Also, a schedule will not include an asset that is not supported by the selected operation. For example, if you have Disaster Recovery for Rockwell devices, but did not purchase Disaster Recovery for Motoman Robots, you won't be able to create a schedule for a Motoman robot, nor will a Motoman robot appear in a schedule for its parent container.

If you are prompted to install agents when creating a Disaster Recovery schedule

An agent is a program capability (such as Disaster Recovery) that can be located and run on a computer to help another computer complete a task. Agents or operations 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.

If you receive a message to install agents or that no agents are installed, the software cannot contact any agents (for example, *Unable to create a new schedule ... No licensed agents are available*). The computers running the agents are not currently available on the network, the agent software needs to be updated, or there are no computers with agents installed on the network.

- When you create a Disaster Recovery schedule, make sure you have not selected an invalid asset, such as a binder or a file. You cannot create any schedules on a binder or file.
- Make sure you have selected a device asset for which you have the Disaster Recovery capability. The Disaster Recovery capability operates only on device assets for which you have purchased the Disaster Recovery capability. You can get Disaster Recovery activation for Rockwell Automation devices and for Motoman robots. See the *FactoryTalk AssetCentre Installation Guide*.
- Creating a Disaster Recovery schedule requires that at least one computer on your network has the Disaster Recovery agent installed on it. If there are no computers with the agent software installed, install the agent software. See the topic "Install FactoryTalk AssetCentre agents" in the *FactoryTalk AssetCentre Installation Guide*.
- If the agent is installed, make sure the computers on which the agent is installed are running and available on your network and that the Disaster Recovery capability is activated. See the *FactoryTalk AssetCentre Installation Guide*.
- The agent software must be the same version as the server. To update the agent software, see the topic "Install FactoryTalk AssetCentre agents" in the *FactoryTalk AssetCentre Installation Guide*.

If you see the message "Failed to create RSLogix 5 [or 500] data [or program ladder] file list"

This message appears if you do not have the RSLogix 5 or RSLogix 500 programming software installed on the client computer on which you are specifying which files and data will be compared during a Backup and Compare operation. Install the appropriate RSLogix programming software on the client computer or use a client computer that already has the programming software.

If the scheduled Disaster Recovery operation never completes

The agent that actually performs the operation may be busy, unavailable, or uninstalled. If *Waiting for Interface* appears next to the scheduled assets in the lower left pane of the **Schedules** tab and it never changes, then either all agents are busy or no agents are online. You can check all schedules on the **Schedules** tab to see whether any are running (and thus using the available agent or agents). You can also check the status bar to see how many agent computers are connected to the system.

If all agents are online, you may need to install the Disaster Recovery agent on more computers or change the execution times so schedules are not running at the same time. To do this, see the topic "Install FactoryTalk AssetCentre agents" in the *FactoryTalk AssetCentre Installation Guide*.

Another reason can be that the FactoryTalk AssetCentre server has been updated, but the software on the agent computer has not been updated. If the agent software version is not compatible with the server software, the agent will not run. A message is logged in the System Event log and the AssetCentre Event log. You can also see the number of active agents appears in the status bar of the FactoryTalk AssetCentre client. To update the agent software, see "Install FactoryTalk AssetCentre agents" in the *FactoryTalk AssetCentre Installation Guide*.

Troubleshoot e-mail notifications

This section includes the following topic:

- If e-mail notifications do not reach their recipients on page 94

If e-mail notifications do not reach their recipients

- Make sure you are using valid e-mail addresses. E-mail addresses must be in standard SMTP format (for example, myaddress@domain.com). Other types of e-mail addresses are not handled by FactoryTalk AssetCentre.
- Check the Event log to make sure the scheduled operation is completing. See Step 1: View logs on page 67.
- Check your schedule definitions on the **Schedules** tab to make sure there are e-mail addresses assigned to receive notifications. See Step 2: Set up recipient lists for schedule results on page 63.
- Make sure the FactoryTalk AssetCentre server is set up to send e-mail.To do this, log onto the FactoryTalk AssetCentre server computer, and then select **Start > Rockwell Software > FactoryTalk AssetCentre Server Settings**. Consult with your e-mail administrator for the correct settings.
- If you are using a firewall (such as the Windows Firewall), make sure the ports used to send e-mail traffic are open. Also make sure that SMTP services are permitted to send traffic through your firewall.

Troubleshoot Logs

This section includes the following topics:

- If you cannot view a log on page 94
- If no data appears in a log on page 95
- If you cannot refresh a log on page 95
- If you cannot show a previously viewed log on page 95

If you cannot view a log

- You might not have the appropriate permissions to view the specific log. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.
- Your server may not be activated. To see if the server is activated, select **Help > About**. Under **Components**, select **FactoryTalk AssetCentre Server Features** and then in the left pane, select **FactoryTalk AssetCentre Server**. Activation information on the server appears on the right.
  If the server needs to be activated, in the **About** dialog box, click **Refresh**. If the server is still not activated, refer to the FactoryTalk Activation Manager Help and contact your system administrator.

If no data appears in a log

- **All logs.** If no data appears in a log, you may not have permission to view the log. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25. There might also be an error regarding your connection to the server. See If the client cannot communicate with the server on page 90.
- **Diagnostics and Health Log.** Initially, only previously existing data appears in the Diagnostics and Health Log if that data was imported from the RSMACC Network Health Solution. This data is not updated by FactoryTalk AssetCentre.
  New data is logged in the Diagnostics and Health Log only if Automatic Device Descriptive Analytics (ADDA) is supported or RSNetWorx MD is installed on your system. Contact your system administrator.

If you cannot refresh a log

If you try and refresh the data in the currently shown log and the message *You do not have permission to view the selected log* appears, your permission to view the log was removed after you shown the log. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.

If you cannot show a previously viewed log

If you try and show a log which you could view previously and the message *You do not have permission to view the selected log* appears, your permission to view the log was removed since you last viewed the log. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25.

Troubleshoot Archive

This section includes the following topics:

If you cannot check in a file

You may have changed an asset's working folder since checking out the file. Make sure that the working folder points to the correct location of the checked-out file. See Step 1: Set a working folder on page 76.

If you cannot open a file

Before opening a file, you must retrieve an image of the file to the current working folder or you will be prompted to either get a read-only copy of the file or check out the file for editing. See Step 5: Open a file for viewing on page 82. If the message *No program associated with the specified file for this operation* appears, you need to specify the software program that should open the file. See Help. Select **Help > Contents**. Open the *Archive* topic and click the **Set file associations** topic.

If the wrong program opens a file

FactoryTalk AssetCentre allows you to set file associations to determine the software product that opens a file. The wrong file association may be set for a file type. See Help. Select **Help > Contents**. Open the *Archive* topic and click the **Set file associations** topic.

If a button is not available

If a button or field on the **Archive** tab is disabled, it generally means the operation cannot be performed because the user doesn't have the required permission. See Step 3: Set Feature Security for FactoryTalk AssetCentre on page 25. Also, the asset state may not permit the operation. For example, you cannot check in a file that has not been checked out.

If you performed a recursive check out and the subfolders didn't copy

If an asset's subfolder has its own working folder specified, files will be copied to that working folder rather than the working folder of the asset. See Step 1: Set a working folder on page 76.

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Review and accept the Rockwell Automation Software and Cloud Services Agreement here.

Open Source Software Licenses

The software included in this product contains copyrighted software that is licensed under one or more open source licenses.

You can view a full list of all open source software used in this product and their corresponding licenses by opening the oss_license.txt file located in your product's OPENSOURCE folder on your hard drive. This file is divided into these sections:

- Components
  Includes the name of the open source component, its version number, and the type of license.
- Copyright Text
  Includes the name of the open source component, its version number, and the copyright declaration.
- Licenses
  Includes the name of the license, the list of open source components citing the license, and the terms of the license.

The default location of this file is:

C:\Program Files (x86)\Common Files\Rockwell\AssetCentre\ReleaseNotes\OPENSOURCE\oss_license.txt

You may obtain Corresponding Source code for open source packages included in this product from their respective project web site(s). Alternatively, you may obtain complete Corresponding Source code by contacting Rockwell Automation via the **Contact** form on the Rockwell Automation website: http://www.rockwellautomation.com/global/about-us/contact/contact.page. Please include "Open Source" as part of the request text.

Rockwell Automation support

Use these resources to access support information.

Technical Support Center	Find help with how-to videos, FAQs, chat, user forums, and product notification updates.	rok.auto/support
Knowledgebase	Access Knowledgebase articles.	rok.auto/knowledgebase
Local Technical Support Phone Numbers	Locate the telephone number for your country.	rok.auto/phonesupport
Literature Library	Find installation instructions, manuals, brochures, and technical data publications.	rok.auto/literature
Product Compatibility and Download Center (PCDC)	Get help determining how products interact, check features and capabilities, and find associated firmware.	rok.auto/pcdc

Documentation feedback

Your comments help us serve your documentation needs better. If you have any suggestions on how to improve our content, complete the form at rok.auto/docfeedback.

Waste Electrical and Electronic Equipment (WEEE)

At the end of life, this equipment should be collected separately from any unsorted municipal waste.

Rockwell Automation maintains current product environmental information on its website at rok.auto/pec.

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FTAC-GR002I-EN-E - January 2024
Supersedes Publication FTAC-GR002H-EN-E - December 2022