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INSTALLATION MANUAL
INSTALLING EMONITOR SOFTWARE WITH AN ORACLE MULTI-USER DATABASE

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Emonitor version 3.70

Contents

1 • Introduction	1
Overview	1
Emonitor system requirements	1
Database system requirements	1
Planning for the installation	2
Upgrading from a previous version	3
What to read next	4
Statement of Technical Support	4
Technical Support	4
2 • Installing the database components	7
Oracle server version compatibility	7
Oracle client version compatibility	7
Tablespace Sizing information	7
Table descriptions	8
Creating tablespaces and users	8
Running the creation scripts	10
Importing the demo data	11
3 • Installing Emonitor	13
Installing FactoryTalk Activation Manager	13
Installing RSLinx Classic	14
Installing the software	14
Installing the XML Gateway prerequisites	14
Installing Emonitor	15
Running the database creation scripts	17
Installing the EDS files	17
Installing online components	18
Installing an Unload Station	18
Installing a Viewing Station	19
Setting up Scheduler to automate tasks	19
Installing the Emonitor Web software	22
Prerequisites	22
Setting up an Emonitor Web website	23



4 • Upgrading from a previous version	25
Backing up your Emonitor configuration files	25
Backing up your Emonitor database	27
Installing Emonitor version 3.70	27
Running the Emonitor upgrade program	27
Installing the EDS files	30
Restructuring the database	30
Restoring your Emonitor configuration files	32
Changing paths in odonline.edi	33
Index	35

1

Introduction

This chapter introduces you to the Emonitor[®] software, and gives an overview of the installation process.

Overview

This installation guide offers information on the entire installation process, including software installation, database server and client installation, and database connection information.

This installation guide is intended for first-time installations or upgrades from earlier versions of Emonitor software. It also contains reference information for later use.

Your satisfaction with the products we provide is our highest priority. Thank you for letting us help you with your machinery information needs.

Emonitor system requirements

- an Intel Pentium[™] 4, Pentium 4-compatible, or greater microprocessor
- 1 GB of RAM (more is better)
- a DVD drive
- 200 MB of space available on the hard drive, or more depending on the size of your database
- VGA or SVGA graphics card
- 17 inch or larger computer monitor (screen)
- Microsoft[®] Windows[®] 7 Professional, Enterprise, or Ultimate operating system.

In addition, you must have Administrator rights on the computer where you are installing Emonitor or any Emonitor components.

Database system requirements

Refer to the database software manufacturer's documentation for the requirements for the computer running the database server software. Note that Emonitor system performance may be reduced by running the Emonitor OPC Server with a large database. In this case, upgrading the database server computer may resolve the problem.

Planning for the installation

Be sure to perform the following tasks before installing Emonitor for the first time.

FIND THE SERIAL NUMBER AND PRODUCT KEY ON THE ACTIVATION CERTIFICATE.

Emonitor requires that you activate your software using license files. As part of the Emonitor installation process, you must install the FactoryTalk Activation software.

The FactoryTalk Activation Manager replaces the old parallel port security keys and the CD Activation Key. The FactoryTalk Activation Manager is installed with Emonitor, and requires the Serial number and Product Key to activate your software. The Activation Certificate is included with your Emonitor Install DVD.

For more information on FactoryTalk Activation, refer to the FactoryTalk Activation documentation.

1. Insert the Emonitor Install DVD into your computer.
2. After the Autorun screen appears, click **Documentation**. The list of available documentation appears in your default HTML browser.
3. Click **FactoryTalk Activation**.



You must have Adobe Reader installed on your computer to read the documentation (documents are in PDF format). To install Adobe Reader, click **Extras** on the Emonitor Install screen, and then click **Adobe Reader**.

MAKE SURE A COMPUTER CAN ACCESS THE INTERNET.

FactoryTalk Activation requires an activation file, also called a license file. Unless you are using a hardware dongle (usually a USB key), you must use the FactoryTalk Activation Manager to request one or more license files from the Rockwell software licensing website. If the computer running Emonitor does not have Internet access, you must contact Rockwell Automation Technical Support to get the activation file by phone. Refer to the FactoryTalk Activation document for more information.

CHECK YOUR AVAILABLE DISK SPACE.

Disk space requirements vary depending on which components you need to install. For a guideline, the Emonitor software requires about 170 megabytes (MB) of disk space. There are additional disk space requirements depending on your database setup. Be sure to check with your database administrator about these requirements and about backing up your database.



BE SURE YOU HAVE THE CORRECT VERSION OF THE DATABASE SOFTWARE INSTALLED.

- On the database server computer:
Before installing Emonitor, make sure the database server version is compatible. You might need to consult with your database administrator to verify which version of the database server you are using. The Oracle database server versions supported by Emonitor are versions 10g, 10gR2, or 11g. If you need to install a new version, ask your database administrator for assistance.
- On the Emonitor client computers:
 - All Emonitor client computers must have the correct database client installed.
 - Before you can open the database using Emonitor, you must create a database alias TNS Names reference to the Oracle server to find the database on the network.
 - The client machine must have the Oracle 11g client installed.



Do not configure the Oracle client to use ODBC to connect to the database.

BE SURE YOU HAVE WINDOWS 7 PROFESSIONAL INSTALLED.

Before installing Emonitor, you need to have the Windows 7 Professional, Enterprise, or Ultimate operating system installed on your computer. Emonitor version 3.70 is supported on the 32-bit versions of Microsoft Windows 7 Professional, Enterprise and Ultimate. Emonitor version 3.70 is not supported on the Windows NT, Windows Vista, Windows 2000 Pro, Windows 2000 Server, Windows XP, Windows Server 2008 or 64-bit versions of Windows 7 operating systems.

Upgrading from a previous version

Emonitor version 3.70 runs only on the Windows 7 operating system. This means that you cannot directly upgrade Emonitor running on an earlier version of Windows (Emonitor 3.50 was not supported on Windows 7). Instead, you must follow these steps:

1. Install Emonitor version 3.70 on a computer running Windows 7,
2. Move your Emonitor configuration files to the computer where you installed Emonitor version 3.70.

Refer to the chapter titled *Upgrading from a previous version*. A new feature of the upgrade process is that the installation program asks if you want to back up your Emonitor configuration files. This includes all the data collector INI files, as well as any configuration files for any of the Emonitor programs (such as the Emonitor Scheduler and

the Emonitor Online components). This allows you to protect your configuration files during an upgrade, and then bring them back into the new version.

If you are upgrading from a version of Emonitor prior to 3.20 (including Emonitor for Windows (EFW), Odyssey, or IQ 2000), please contact Customer Support for assistance. Additional steps are required to upgrade from the 16-bit to 32-bit software. See *Statement of Technical Support* on page 4 for contact information.

What to read next

To learn about new features and improvements in Emonitor, read the *Emonitor Product Release Notes*. These are located on the Emonitor Install DVD (insert the DVD and then click **Documentation**).

To get started quickly, read the *Emonitor Getting Results Guide*. The *Emonitor Getting Results Guide* introduces you to the software, and shows you how to use the online help included with the software. This Guide is also located on the Emonitor Install DVD.

Refer to the online help for detailed instructions on using all the functions of the software. The online help system also includes explanations for all the commands and controls. Just press F1 to access the online help at any time in Emonitor.

If you are using data collectors with a walk-around system, you may receive an additional *Data Collector User's Guide* for each of those interfaces. If you are using an online system, read the *Emonitor Online Getting Results Guide* and the *Emonitor Enterprise Online Condition Monitor Getting Results Guide* (on the Emonitor Install DVD and in the Emonitor program directory). You may receive additional manuals for the hardware you use for data collection. These manuals are delivered as PDF files on the CD that comes with the data collector or other hardware. You can also reference the data collector online help files installed with Emonitor from the Help menu in Emonitor.

Statement of Technical Support

Technical Support

If you cannot connect to the Internet or cannot find answers to your questions in this help file or on the Technical Support Web site, call Technical Support.

- Phone: 440-646-3434 in North America
- Technical Support hours of operation: 8:00 AM - 5:00 PM

If you are not located in North America and want to contact Rockwell Automation Technical Support by telephone, access the web address

<http://www.rockwellautomation.com/support/>, select your region and country under Get



Support Now, and then click Get Support 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

For information about all Rockwell Automation products or for technical support, select one of the following:

<http://www.rockwellautomation.com/rockwellsoftware/>

<http://www.rockwellautomation.com/support/>

<http://rockwellautomation.custhelp.com/>

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INSTALLING EMONITOR SOFTWARE WITH AN ORACLE MULTI-USER DATABASE

2

Installing the database components

This guides you through the database installation process.

Oracle server version compatibility

Emonitor runs on the following server versions:

- Oracle 10g and 10gR2
- Oracle 11g

Read the Oracle documentation for information about installing the server. As always, if you are updating, back up everything to insure that you have a backup copy.



The screen captures and steps in this chapter are for Oracle version version 10g.

This guides you through the database installation process.

Oracle client version compatibility

Emonitor runs on the Oracle 11g client.

Tablespace Sizing information

The sizes in these examples are just suggestions. You may have to adjust the sizing, depending on how many machines data is collected on, the types of data collected, and how often data is collected.

The demonstration data, which is imported once the structure is created, uses these tablespace sizing guidelines. The table descriptions appear in *Table descriptions* on page 8.

entekd 500M (for walk-around data collection only; for systems that also collect data from online data sources, use one Gigabyte or more)
enteki 150M
econfigd 40M
econfigi 10M

These are too small, however, for any other usage.

Table descriptions

These tables expand the most as items are added to them. The amount and type of expansion are described below.

- **MULTI_VALUE_DATA**
This table experiences exponential growth. This table holds data with multiple components, such as spectrum and time waveform data. The amount of growth depends on how often data is collected and the type of data collected.
- **SINGLE_VALUE_DATA**
This table also experiences ongoing growth. This table holds magnitude measurement data, as well as numeric, calculated, and enumerated measurement data (known collectively as process measurements.) The amount of growth depends on how often single-value measurements are collected.
- **LOCATION**
This table also experiences ongoing growth, because it is related to the number of locations created in Emonitor.
- **MEASUREMENT_DEF**
This table also experiences ongoing growth. The growth is related to the number of measurement definitions created in Emonitor.
- **HIERARCHY_LIST**
This table also experiences ongoing growth. The growth is related to the number items in the Hierarchy Tree in Emonitor (plants, equipment trains, machines, and possibly components).
- **ALARM**
This table expands as alarms are added to the measurement definitions. One measurement definition can have multiple alarms associated with it. However, once users have set up most of the alarms, this table will not expand as quickly.
- **CATEGORY**
This table expands as categories are added to the software. The demo data contains three pre-defined categories that users can use. However, users will likely want to tailor those categories to fit their needs, so the table may expand in the beginning. Once the users set up the categories, these tables will not expand.

Creating tablespaces and users

The default names for the entek tablespaces are entekd and enteki. You can rename them but remember to modify the entekora.sql script as needed to reflect the new tablespace naming. The same applies to the econfig tablespaces (econfigd and econfigi).



These scripts are located in the Emonitor program directory
C:\Program Files\Rockwell Software\Emonitor.

The guideline for index file sizing is about 25% of the data file. This is quite generous and can be changed if needed.

1. Using SQL*Plus, connect to Oracle as an administrator.
2. Create the tablespaces to hold the tables using these commands.

```
create tablespace entekd datafile 'entekd.ora' size 600M;
create tablespace enteki datafile 'enteki.ora' size 150M;
create tablespace econfigd datafile 'econfigd.ora' size
50M;
create tablespace econfigi datafile 'econfigi.ora' size
10M;
```

3. Create Entek and Econfig users using the commands below.



We recommend using a different password for the ECONFIG database user than the password used for the vibration database or databases. You may be required to reinstall Emonitor if you accidentally connect to the ECONFIG database using File > Change Database in Emonitor if the ECONFIG database uses the same password as an Emonitor vibration database.

```
create user entek
identified by euser
default tablespace entekd
quota unlimited on entekd
quota unlimited on enteki;

create user econfig
identified by econfig
default tablespace econfigd
quota unlimited on econfigd
quota unlimited on econfigi;
```

4. Grant the users proper rights by using these commands.

```
grant connect, resource, create view to entek;
grant connect, resource to econfig;
```

You are creating two schema, the entek schema and the econfig schema. Both are needed for the software to run properly. The entek schema holds the collected vibration data and other items to run the software. The econfig schema holds the database configuration information and does not grow much. All data is housed in entekd.

Running the creation scripts



The database creation scripts are installed with the Emonitor software (described in Chapter 3 - *Installing Emonitor*). You must install Emonitor first, and then run the database creation scripts.



If you are upgrading Emonitor on a network system with a pre-existing Emonitor database, do not run the database creation scripts. The Emonitor databases already exist on your database server.

TO CREATE THE ENTEK DATABASE:

1. Connect as the entek user using this command.

```
connect entek/euser@connectstring
```



Use the actual TNS name reference in place of *connectstring*.

2. If needed, modify the script file entekora.sql so the correct tablespace names are used. If you use the defaults shown in this document, you do not need to modify the files. Run the table creation script located in the Emonitor program directory. This script also creates the constraints for the tables. Be sure to turn the spool file on.

```
@ 'c:\ProgramFiles\  
Rockwell Software\Emonitor\entekora.sql';
```

TO CREATE THE ECONFIG DATABASE:

1. Connect as the econfig user using this command.

```
connect econfig/euser@connectstring
```



Use the actual TNS name reference in place of *connectstring*.

2. If needed, modify the script file cfgora.sql so the correct tablespace names are used. If you use the defaults shown in this document, you do not need to modify the files. Run the table creation script located in the Emonitor program directory. This script also creates the constraints for the tables. Be sure to turn the spool file on.

```
@ 'c:\Program Files\  
Rockwell Software\Emonitor\cfgora.sql';
```

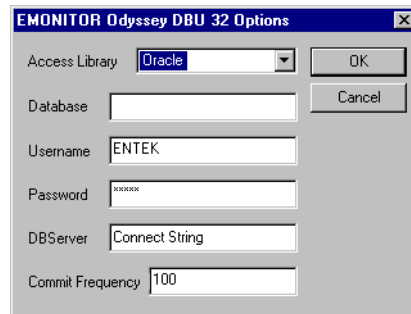


Importing the demo data

1. After running the table creation scripts, you must run Efwdbu32.exe to import the data into the tables. This data is required for the software to run. Efwdbu32.exe is located in the program directory after you install Emonitor. The default for Emonitor is C:\Program Files\Rockwell Software\Emonitor

Select **Start > Program Files > Rockwell Software > Emonitor > Utilities > Emonitor Import-Export Utility**.

2. From the **Options** menu, choose **Import**. Choose the following settings for each field.
 - Leave the **Database** field blank.
 - For **Username**, enter the Entek username.
 - For **Password**, enter the password for the Entek username.
 - For **DBServer**, enter the connect string for the database.



3. From the **File** menu, choose **Import Database**. Select the entek.dbu file created with the script and choose **Open**. The import process takes some time, please be patient.
4. After the Entek data has been imported, change the options for the econfig database. From the **Options** menu, choose **Import**. Change the **Username** to Econfig and enter the Econfig password.
5. Repeat the import process for the econfig.dbu file created with the cfgora.sql script. From the **File** menu, choose **Import Database**. Select the econfig.dbu file created with the script and choose **Open**.

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3

Installing Emonitor

This chapter guides you through the installation process for Emonitor. If you are upgrading from an existing version, refer to Chapter 4, *Upgrading from a previous version*.

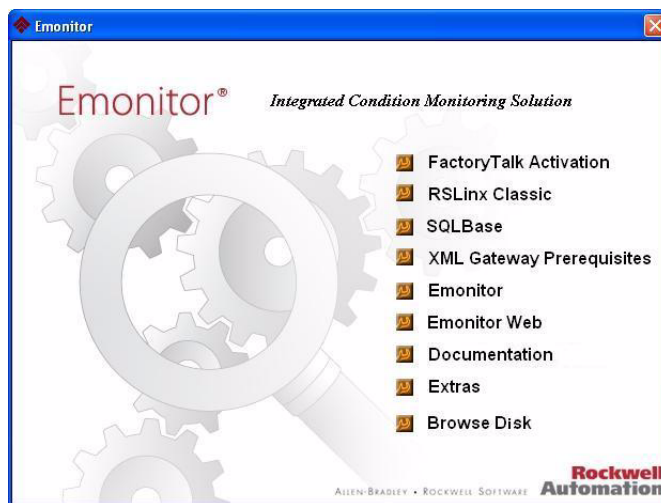


When you upgrade from an earlier version of the Emonitor software (version 2.3 and earlier), the Process data type is replaced with the new Numeric data type for existing measurement definitions.

Installing FactoryTalk Activation Manager

Emonitor requires that you activate your software using license files. As part of the Emonitor installation process, you must install the FactoryTalk Activation Manager. For more information on FactoryTalk Activation, refer to the FactoryTalk Activation documentation. To display the documentation, follow these steps:

1. Insert the Emonitor Installation DVD into the DVD drive of your computer. It should auto-start and display the Autorun screen. If the Autorun screen does not appear, start the Windows Explorer and navigate to your DVD drive. Double-click autorun.exe on the Emonitor DVD to run the installation program.



If you are running the DVD from another computer, you must map the DVD to a drive on your local computer.

2. After the Autorun screen appears, click **Documentation**. The list of available documentation appears in your default HTML browser.
3. Click **FactoryTalk Activation**.
4. After reviewing the FactoryTalk Activation documentation, return to the Autorun screen.
5. From the Autorun screen, click **FactoryTalk Activation** to install the FactoryTalk Activation Manager from the DVD drive.
6. When finished, click **Back** to return to the main Autorun screen.

Installing RSLinx Classic

You must install RSLinx® Classic if you want to import measurements from certain online instruments:

- Use XM/DYN Online Data to import data from XM and XM DYN modules into the Emonitor database
- Use Logix Online Data to import data from the Logix family of controllers into the Emonitor database.



You must install RSLinx Classic before you install Emonitor. RSLinx Classic installs the FactoryTalk Services Platform, which includes the latest Windows Firewall Configuration Utility. This utility configures the Windows firewall to work with Rockwell Automation products.

Installing the software

If you already have RSLinx Classic version 3.60 or later installed, you do not have to perform these steps.

1. From the Autorun screen, click **RSLinx Classic**.
2. Follow the steps as directed by the RSLinx Classic installation wizard.
3. Click **RSLinx Classic** and follow the directions that appear on the screen.
4. When the installation is complete, return to the Autorun screen and continue the installation process.

Installing the XML Gateway prerequisites

When installing Emonitor version 3.70 on the Windows 7 Professional, Enterprise, or Ultimate operating system, you do not need to install any additional software for the CMMS XML Gateway, and can skip this step.

- 5.

Installing Emonitor

This installation is intended for first-time installations. If you are upgrading from a previous version of Emonitor, see the chapter *Upgrading from a previous version*.

The installation program installs all Emonitor components by default. You can, however, customize your selections during the installation.



The CD Activation Key that was used to define the available features in Emonitor 3.00 and earlier versions has been replaced by FactoryTalk Activation described in *Installing FactoryTalk Activation Manager* on page 13.

Portable systems use walk-around data collectors for collecting data, and all Emonitor components can be installed on one computer. Online systems use networked systems that monitor and collect data, and Emonitor can be installed on different computers to increase efficiency. You may also use a combination of portable and online systems, and use different computers for each part.

This section walks you through the installation step-by-step with specific information available when needed. This section goes through a typical installation for a portable system.

Exit any running applications before starting the Emonitor installation program.



The Emonitor installation program requires that you reboot your computer after installing the software.

1. From the main Autorun screen click **Emonitor**. Follow the instructions on the screen.
2. Select your database type at the Database Selection dialog, and then click **Next**.
3. Some database types ask you to confirm or select your database version. Click **Next** to continue.
4. Select the **XML Gateway** if you want to install the Emonitor CMMS XML Gateway, and then click **Next**.
5. The next dialog shows the system requirements. If your system passes, click **Next**. See *Emonitor system requirements* on page 1 for more information.
6. Choose the directory where you want to install Emonitor. Click **Browse** to change the destination directory.
7. Select the program folder on the Start menu for Emonitor, then click **Next**.
8. Click **Next** to accept the configuration. The installation program begins copying files to your computer.



- The installation program installs the Windows Firewall Configuration Utility. The Firewall Configuration program then runs to automatically modify the Windows Firewall settings to allow the following Emonitor components to operate: Emonitor OPC Server and OPC Enumerator, SQL Server, DCOM, Enlive, and the Emonitor Online programs (Enwatch/6600 Setup, Online Data Console, Create Loadfile, Load and Unload). Then the DCOM Security configuration program runs to complete the modifications.



The message “The Windows Firewall configuration interface is unavailable” may appear if the Windows Firewall is disabled. If you are using some other software or hardware firewall, you may need to manually configure it to allow the Emonitor programs to communicate.

- For Oracle or MS SQL Server databases**, enter the name of the database alias/tsname reference for the Entek database in the **Connect** field, and the username and password in the following fields. You may want to write down this string so you remember it later. Click **Next** to continue.

Emonitor - InstallShield Wizard

Connectivity Information

Please fill in the following information about the database your Emonitor components will be connecting to. If you do not know these values, contact your database administrator to get them.

Connect

Username

Password

InstallShield

< Back Next > Cancel

Repeat this procedure at the next screen for the EConfig database.



IMPORTANT: If you do not enter the correct information, the next time you start Emonitor, the program displays a database connection error message. Click Retry and enter the correct information (your connect string, username, and password). Due to enhanced security in Emonitor versions 3.40 and later, the password is encrypted and can no longer be edited in the Registry.

11. The installation is nearly complete. Select **Yes, I want to restart my computer now** and click **OK** to restart your computer. The Emonitor installation is now complete.

Running the database creation scripts



If you are upgrading Emonitor version 3.70 on a network system with a pre-existing Emonitor database, do not run the database creation scripts, The Emonitor databases already exist on your database server.

You must run a database creation script to create the Entek and EConfig databases. If the Entek databases already exist, you can connect to them, and you do not need to follow these steps. The scripts to create the databases are installed with Emonitor, so they can only be run after you install Emonitor.

See *Running the creation scripts* on page 10.

Installing the EDS files

If you are want to use Emonitor Online with, or import data from, XM or XM DYN modules into Emonitor, you must install the latest EDS files for the XM and XM DYN modules. EDS files are simple text files that are used by network Configuration Tools such as the Emonitor Online Configuration Utility to describe products so that you can easily commission them on a network. EDS files describe a product device type, revision, and configurable parameters.



You must install RSLinx Classic 3.60 or later before you can install EDS files.

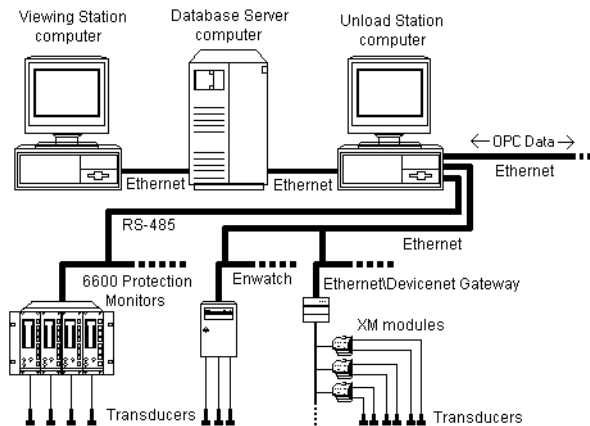
1. Start the EDS Hardware Installation Tool. Click **Start > Program Files > Rockwell Software > RSLinx > Tools > EDS Hardware Installation Tool**.
2. In the EDS Hardware Installation Tool, click **Add**.
3. Select **Register a directory of EDS files**.
4. Click **Browse**, and navigate to the Emonitor program directory and click **OK**. The default directory is `C:\Program Files\Rockwell Software\Emonitor`.
5. Click **Next**. The Tool installs all the EDS files in the Emonitor program directory. Some EDS files may show minor errors that do not have any functional impact, such as “The help string has exceeded the maximum length.” Click **Next**.
6. Continue to click **Next** to complete the EDS Wizard, and finally click **Finish**.

Installing online components



This section only applies to Emonitor Online systems. If you do not have Emonitor Online, you can skip this section and go to *Setting up Scheduler to automate tasks* on page 19.

You can run all the components of the online system on a single computer or you can use several computers for an online system. If you are using a multi-user database, you can designate certain computers as Unload Stations and Viewing Stations, as illustrated in this diagram. For Emonitor with a single-user database, the Viewing Station, Database Server, and Unload Station are all on the same computer. This section covers setting up a multiple-computer Emonitor online system with an Unload Station and a Viewing Station.



For more information on the Emonitor Online system, please refer to the *Emonitor Online Getting Results Guide* and the help for the Online Data Management Console (Click **Start** > **Programs** > **Rockwell Software** > **Emonitor** > **Help** > **Online Data Management Console**).

Previous versions of Emonitor required that you install different components on different computers within an Emonitor Online system. This version of Emonitor simplifies the install process by installing all components to all computers in the Emonitor Online system.

Installing an Unload Station

Choose the computer to be used as an Unload Station, and start the Emonitor installation program at that computer. Go through the installation process as directed in *Installing Emonitor* on page 15. Make sure you install RSLinx Classic version 3.60 or later if you want to import data from XM or XM DYN modules or the Logix family of controllers.



Installing a Viewing Station

Choose the computer to be used as a Viewing Station, and start the Emonitor installation program at that computer. Go through the installation process as directed in *Installing Emonitor* on page 15.

Setting up Scheduler to automate tasks

You can use the Scheduler program to automate many data-related tasks. A task automated in Scheduler is called an *event*. A *Scheduler profile* defines not only the event, but also when and how often the event should occur. The Scheduler has two parts:

- The Scheduler program that allows you to create and edit profiles.
- The Scheduler service that runs in the background and launches (executes) the scheduled profiles. The Scheduler service must be running in order to execute scheduled profiles.

The Emonitor Scheduler service is disabled by default. In order to launch (run) scheduled tasks, including importing data, you must enable the Scheduler service.

To start the Scheduler service

You must have Administrator privileges to start the Scheduler service.

1. Click **Start > Control Panel > Administrative Tools > Services**.
2. Select **Services (local)** in the left side of the Services window.
3. Select **SchedulrSvc** in the right side of the Services window.
4. The SchedulrSvc **Startup Type** should be **Automatic**. If it is **Manual** or **Disabled**, right-click on SchedulrSvc and select **Properties**. In the Properties dialog box, set **Startup Type** to **Automatic**, and then click **OK**.
5. The SchedulrSvc **Status** should be **Started**. If it is **Stopped**, right-click on SchedulrSvc and select **Start**.



We strongly recommend that you leave the Startup Type for the SchedulrSvc as “Automatic” in the Services console. This starts the Scheduler service automatically when Windows starts.

After you have enabled the Scheduler service, it starts when you start Windows. Scheduled events are executed only when the Scheduler service is running. You can use

the Scheduler on any computer in an Emonitor Online system (both Viewing station and Unload station computers).



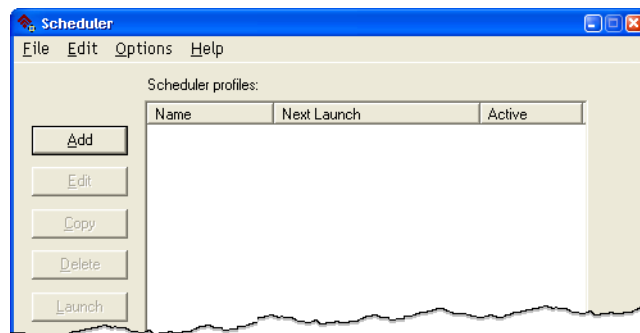
The Emonitor Scheduler is installed as part of the Emonitor software. Since Scheduler profiles are stored in the central Emonitor database, all scheduler profiles are launched on all computers in an Emonitor Online system that are running the Scheduler service. This may not be a problem if you are using Scheduler only for data import tasks on one or two computers. If you are using Scheduler for additional kinds of tasks, such as Emonitor database maintenance, running the same scheduled task from multiple computers can place a significant load on the Database Server computer. Refer to the Scheduler help for more information (**Start > Programs > Rockwell Software > Emonitor > Help > Scheduler**).

These steps show you how to set up two different online profiles. The first is the **Online Import Event**, which looks for unload files (containing data from the data collection instruments) in the unload directory and sends the information to the Emonitor database. The second is the **Storage Limit Updater**, which allows you to limit data storage to specific parameters and specify a time during low database usage, saving disk space and time (a database maintenance task). Follow these steps to set up online profiles using Scheduler.



For more information on setting up different kinds of Scheduler profiles, refer to the Scheduler online help.

1. Start Scheduler (**Start > Programs > Rockwell Software > Emonitor > Utilities > Scheduler**) and click **Add**.



2. On the Profile dialog, enter the **Profile Name**, such as Storage Limit Updater or Online Import Event. You can enter notes about the profile as well. Select **Enable profile for scheduling**. Click **Next** to continue.

3. On the Response dialog, select **Scheduled time/date/frequency**.
 - For the Storage Limit Updater, click **Next** and then skip to step 7.
 - For the Online Import Event, select **File change notification** and click **Settings**.
4. Click **Add File**. Select the UD directory under your Emonitor program directory. In the **File name** box, enter *.ulf. This tells Scheduler to look for unload files in the unload directory. Click **Open**.
5. The unload files appear in the **Monitored Files** list. Click **OK** to continue.
6. Click **Next** on the Response dialog.
7. On the Events dialog, click **Add Event**.
8. Enter the **Executable file** and the **Command line** using the following guidelines, then click **OK**. This example used the default Emonitor installation directory. If you installed Emonitor in a different directory, use the path to your Emonitor program directory.

For Online Import Event:

Executable file: C:\Program Files\Rockwell Software\
Emonitor\didamon.exe
Command line: C:\Program Files\Rockwell Software\
Emonitor\odonline.edi

For Storage Limit Updater:

Executable file: C:\Program Files\Rockwell Software\
Emonitor\stglimit.exe

Command line (must be one of the following):

- /all - Remove all measurement data, system event log data and alarm event log data outside the storage limits.
 - "/list:list name" - Remove measurement data which are saved to a list with "list name" and are outside the storage limits. Note: "list name" is case sensitive, and must be enclosed in quotes if the list name contains a space.
 - /alarm - Remove alarm event log data outside the storage limits.
 - /system - Remove system event log data outside the storage limits.
9. Click **Next** to continue.
 10. On the Frequency dialog, set the **Date** and **Time** you want to launch the profile. Click **Finish**.

The profile is now added to Scheduler. The executable file and command line information for the various database import and update programs is also included in the online help for the Scheduler program. You can display the Scheduler help by pressing F1, or from the Start menu (**Start > Programs > Rockwell Software > Emonitor > Help > Scheduler**).

You can find more information on using the Scheduler in an Emonitor Online system in the help for the Online Data Management Console. Click **Start > Programs > Rockwell Software > Emonitor > Help > Online Data Management Console** in the section on “Setting up the Emonitor Online System”.

Installing the Emonitor Web software

Any level of Emonitor can now be enhanced with the Emonitor Web software. This allows you to view data from your Emonitor database over an intranet or over the Internet, using Microsoft Internet Explorer. The Emonitor Web software uses concurrent user licensing. This limits the number of people who can view the Emonitor data at one time, without restricting them to specific computers with FactoryTalk Activation.

The Emonitor Web software allows you to view data for any point in your Emonitor database by “drilling down” to the location, and then double-clicking the data type to view trend and spectrum plots from within Internet Explorer. Typical Emonitor cursor functions are available in these plots. You can also view reports with Emonitor Web, as well as load and unload a data collector from a remote location, and then transfer the data back to the Emonitor database.

Prerequisites

- Microsoft Internet Information Server (MS IIS) version 7.5 or greater must be installed and configured to run active server pages on the web server computer.
- The FTP component in MS IIS must be installed if you want to load and unload data from a remote site using Emonitor Web. The FTP directory should be on the same computer as the Emonitor Web server.
- The FactoryTalk Activation Manager software must be installed on the web server computer (installed from the Emonitor DVD).
- The Oracle database client or MS SQL Server client must be installed on the web server computer, and configured to connect to the database server. The database server can be located on the web server.
- The computer running Internet Explorer must be able to access the web server computer, either over an intranet, or over the Internet.
- Users are able to connect to the database using the database alias, Windows computer name, or IP address.



- If users at the remote site are logged into a Windows domain controller, Emonitor Web uses the user name and domain name to identify the Emonitor Web user.
- The FactoryTalk Activation license must include the license for the Emonitor Web Client.
- Emonitor Web has been tested (and is supported) on the following combinations of software and operating systems:

IIS version	Host operating system
7.5	Windows 7 Professional

IE version	Host operating system
9.x	Windows 7 Professional

Emonitor Web is not supported with Windows XP, Windows Vista, Windows Server 2008, or any earlier version of Windows.

Setting up an Emonitor Web website

These instructions assume you have already installed Emonitor and the required database software as described in this manual. You must have Administrator privileges to install the software.

1. Insert the Emonitor DVD into the DVD drive of the web server computer (the computer with Microsoft IIS).
2. After the Autorun screen appears, click **FactoryTalk Activation** to install the FactoryTalk Activation client software on the web server computer. When finished, return to the Autorun screen.
3. Click **Emonitor Web** to install the required files on the web server.
4. Set up a Web Application in the MS IIS, with the Virtual Directory pointing to the directory where you installed the Emonitor Web files. The default Execute Permissions (Scripts Only) are sufficient to operate the Emonitor Web Server.
5. Create an FTP load and unload directory for each Emonitor Web user created in Emonitor. The Emonitor Web user must have read/write permission in both directories. If the Emonitor Web user's name is "fred", the directories should be:



(FTP root)/fred/upload
(FTP root)/fred/download



For more information on setting up Emonitor Web users, refer to the Emonitor online help.

6. To start the Emonitor Web Client from a different computer, start Internet Explorer. Enter the correct IP address or URL, followed by the name of the Virtual Directory. For example, if the URL for the web server is www.webserver.com/server, and the Virtual Directory is /emonitor, use www.webserver.com/server/emonitor as the Emonitor Web Client address in Internet Explorer.

4

Upgrading from a previous version

This chapter guides you through the process of upgrading from an earlier version of the Emonitor software.



Emonitor version 3.70 has been tested on, and is supported on, Windows 7 Professional, Enterprise, and Ultimate (32-bit versions only). Emonitor version 3.70 is not supported, and may not install or run as expected, on any other Windows operating system.



If you upgrading from Emonitor version 3.20 or earlier (including Emonitor for Windows - EFW - or Odyssey or IQ2000), please contact Customer Support for assistance. You may need to perform additional steps to upgrade (see *Statement of Technical Support* on page 4).



When you upgrade from a previous version of the Emonitor software that uses the Process data type, the Process data type is replaced with the new Numeric data type for existing measurement definitions.

Emonitor version 3.70 runs only on the Windows 7 operating system. This means that you cannot upgrade your previous version of Emonitor (3.5 and earlier); instead, you must install Emonitor version 3.70 on the computer running Windows 7. As part of this process, you must move your Emonitor configuration files from the computer with the earlier version of Emonitor to the computer where you will install Emonitor version 3.70.

If you are upgrading from Emonitor 3.60 on Windows 7, you do not have to move your files from the computer running Emonitor 3.60. You can upgrade to Emonitor version 3.70 by running the Emonitor Installation program on that computer.

Your Scheduler, Enwatch/6600 Online Data, XM/DYN Online Data, Enterprise Online Configuration Utility, and Emonitor OPC Client, and Emonitor OPC Server configuration files from previous versions of Emonitor should work with the new version of Emonitor. You will need to move these configurations to the new computer. You will also need to create new data sources in the Online Data Management Console after you install Emonitor 3.7. For more information, refer to the Online Data Management Console help after you complete the upgrade (click **Start > Programs > Rockwell Software > Emonitor > Help > Online Data Management Console**).

Backing up your Emonitor configuration files

Emonitor uses configuration files that are stored outside of the Emonitor database. These files contain the settings for a number of Emonitor programs, including the Scheduler, Enwatch/6600 Online Data, XM Emonitor Gateway, Enterprise Online Configuration Utility, and Emonitor OPC Client, and Emonitor OPC Server. If you are upgrading from Emonitor version 3.5 or earlier, and want to use these configuration files with Emonitor

version 3.70, you must copy them from your current Emonitor installation to the computer running Emonitor version 3.70. If you are upgrading from Emonitor 3.60 on the same computer, you do not need to manually back up your configuration files.

The default directories for the configuration files are listed below. If you have stored configuration files in different directories, make sure that you back up the files from those directories as well.



If you are backing up configuration files for RSMACC EOL, make sure that the .DCF file names do not conflict with the same file types from Emonitor Online. If necessary, rename the .DCF files from RSMACC EOL.

- DCF Files (Windows XP)
For Emonitor Online:
C:\Program Files\Rockwell Software\Emonitor\[PROFILE_NAME].DCF
For RSMACC EOL:
\\Program Files\Rockwell Software\RSMACCEOL
- EOL Files (Windows XP)
For Emonitor Online:
C:\Program Files\Rockwell Software\Emonitor\[PROFILE_NAME].EOL
For RSMACC EOL:
\\Program Files\Rockwell Software\RSMACCEOL
- OnlineDataConsole.xml (Windows XP)
C:\WINDOWS\system32\OnlineDataConsole.xml
- Templates (Windows XP)
C:\Program Files\Rockwell Software\Emonitor\English Templates
C:\Program Files\Rockwell Software\Emonitor\Metric Templates
- Load and Unload directories (Windows XP)
C:\Program Files\Rockwell Software\Emonitor\LD
C:\Program Files\Rockwell Software\Emonitor\UD
- Online directory (Windows XP)
C:\Program Files\Rockwell Software\Emonitor\Online
- New EDS files are installed when you install Emonitor 3.70 on the computer running Windows 7; however, you must back up any custom EDS files.
- INI, EDI and EAX Files (Windows XP)
C:\Program Files\Rockwell Software\Emonitor\



Backing up your Emonitor database

Unload any data collectors and back up your Emonitor database before proceeding.

Installing Emonitor version 3.70

If you are upgrading from Emonitor 3.50 or earlier, install Emonitor version 3.70 on the computer running the Windows 7 operating system. See Chapter 3, *Installing Emonitor* for instructions. If you are upgrading from Emonitor 3.60 on Windows 7, see “Running the Emonitor upgrade program” on page 27.

Running the Emonitor upgrade program

If you are upgrading from Emonitor version 3.60 on Windows 7, you can use the installation program on the Emonitor DVD to upgrade your Emonitor software.



Make sure you follow these steps before upgrading.

1. Unload all data collectors before upgrading. You will not be able to unload them after the upgrade.
 2. Back up your databases before upgrading to the latest version.
-

Exit any running applications before starting the Emonitor upgrade program.




The Emonitor upgrade program requires that you reboot your computer after upgrading the software.

1. Insert the Emonitor Installation DVD into the DVD drive of your computer.



If you are running the DVD from another computer, you must map the DVD to a drive on your local computer.

2. Emonitor requires that you activate your software using license files. As part of the Emonitor upgrade process, you must install or upgrade the FactoryTalk Activation software. For more information on FactoryTalk Activation, refer to the FactoryTalk Activation documentation. To display the file, follow these steps:
 - a. Insert the Emonitor Install DVD into your computer.
 - b. After the Autorun screen appears, click **Read Documentation**. The list of available documentation appears in your default HTML browser.
 - c. Click **FactoryTalk Activation**.


- d. When finished, click **Back** to return to the main Autorun screen, and then click **FactoryTalk Activation** to install or upgrade the FactoryTalk Activation software. If you already have the latest version of the software, you can skip this step.
 5. When finished, click **Back** to return to the main Autorun screen, and then click **RSLinx Classic** to upgrade RSLinx® Classic. If you want to use XM/DYN Online Data to import data from XM modules or Logix Online Data to import data from the Logix family of controllers, RSLinx Classic version 3.60 or later must be installed on the same computer. Follow the instructions on the screen to install or upgrade RSLinx Classic.
-  The XM/DYN Online Data and Logix Online Dats software require the RSLinx Classic software. It is recommended that you update RSLinx Classic before you updat Emonitor.
6. When finished, return to the main Autorun screen. Even if you are using the XML Gateway with your Emonitor system, you do not need to click **XML Gateway Prerequisites**. The correct versions of the software are included in Microsoft Windows 7.
 7. When finished, click **Back** to return to the main Autorun screen, and then click **Emonitor**. Follow the instructions on the screen.
 8. The installation program detects that installed Emonitor components are not up to date.





- **Upgrade all components installed by the previous setup.** This option installs the upgraded version with the same configuration as your existing installation.
- **Remove all installed components.** This option removes the Emonitor software from your computer. You will not be able to run Emonitor after you remove the software; however, the Emonitor database, other data files, and configuration files remain on your computer.

Click **Upgrade all components installed by the previous setup**. If you see a message about a read-only file having been detected, click **Yes** to continue.

9. Enter or select the folder where the installation program stores the Emonitor configuration files. This includes all the data collector INI files, as well as any configuration files for any of the Emonitor programs (such as the Emonitor Scheduler and the Emonitor Online components). This allows you to protect your configuration files during an upgrade, and then bring them back into the new version.
 10. After backing up your configuration files, the installation program removes the old version of Emonitor, and then requires that you restart your computer. Select **Yes, I want to restart my computer now** and click **OK** to restart your computer. After you restart the computer, the installation program continues.
 11. Select the XML Gateway if you want to install or upgrade the Emonitor CMMS XML Gateway, and click **Next**.
 12. The next dialog shows the system requirements. If your system passes, click **Next**.
 13. Choose the directory where you want to install Emonitor. Click **Browse** to change the installation directory.
-  You can choose a different directory in which to install Emonitor, but the previous installation will no longer work. The installation program will not upgrade your previous installation or install a new database.
14. Click **Next** to add the Emonitor folder to your Start menu.
 15. Click **Next** to accept the configuration. Setup begins copying files to your computer.
 16. The installation program installs the Windows Firewall Configuration Utility. The Firewall Configuration program then runs to automatically modify the Windows Firewall settings to allow the following Emonitor components to operate: Emonitor OPC server and OPC enumerator, SQL Server, DCOM, Enlive, and the Emonitor Online programs (Enwatch/6600 Online Data, Online Data Console, Create Loadfile,

Load and Unload). Then the DCOM Security configuration program runs to complete the modifications.



The message “The Windows Firewall configuration interface is unavailable” may appear if the Windows Firewall is disabled. If you are using some other software or hardware firewall, you may need to manually configure it to allow the Emonitor programs to communicate.

17. The upgrade is nearly complete. Select **Yes, I want to restart my computer now** and click **OK** to restart your computer. The Emonitor software upgrade is now complete.

Installing the EDS files

If you want to use Emonitor Online with, or import data from, XM or XM DYN modules into Emonitor, you must install the latest EDS files for the XM and XM DYN modules. EDS files are simple text files that are used by network Configuration Tools such as the Emonitor Online Configuration Utility to describe products so that you can easily commission them on a network. EDS files describe a product device type, revision, and configurable parameters.



You must install RSLinx Classic 3.60 or later before you can install EDS files.

1. Start the EDS Hardware Installation Tool. Click Start > Program Files > Rockwell Software > RSLinx > Tools > EDS Hardware Installation Tool.
2. In the EDS Hardware Installation Tool, click **Add**.
3. Select **Register a directory of EDS files**.
4. Click **Browse**, and navigate to the Emonitor program directory and click **OK**. The default directory is C:\Program Files\Rockwell Software\Emonitor.
5. Click **Next**. The Tool installs all the EDS files in the Emonitor program directory. Some EDS files may show minor errors that do not have any functional impact, such as “The help string has exceeded the maximum length.” Click **Next**.
6. Continue to click **Next** to complete the EDS Wizard, and finally click **Finish**.

Restructuring the database

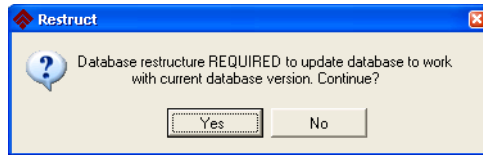
After any upgrade, you must restructure the database. This adds the necessary data and structure information to your current database, allowing you to run the new version of the

program. When you start Emonitor, the restructure program automatically starts if it is needed. Follow these steps the first time you start Emonitor after performing an upgrade.



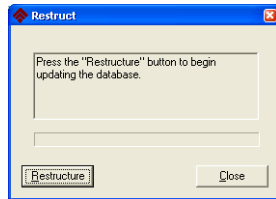
Make sure you follow these steps before restructuring your database.

1. Back up your databases before upgrading to the latest version.
 2. Unload any data collectors before upgrading.
 3. Make sure no users are connected to the database.
-
1. If you are upgrading from Emonitor version 3.30 or earlier, you must rename the files in the \Restruct folder from *.msq to *.sql (on the computer where you installed Emonitor). If you fail to rename the restructure files, the database restructure process will fail.
 2. Start your Emonitor software from the **Start** menu on any client computer (**Start** > **Programs** > **Rockwell Software** > **Emonitor** > **Emonitor**). Click **Yes** to update your database.

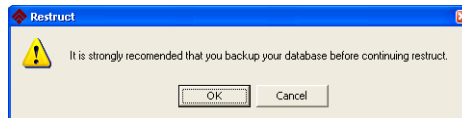


After you enter the Admin user name and password, the restructure program automatically starts. The default Admin username and password are “admin” and “password”.

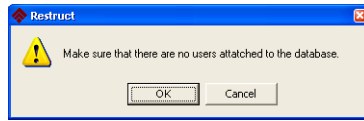
3. Click **Restructure** to begin the update process.



4. Make sure you have backed up your database, then click **OK** to continue.

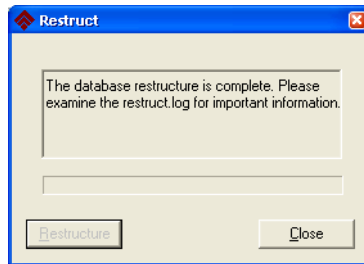


5. Make sure that no users are still attached to the database, then click **OK** to continue.



Allow plenty of time to restructure your database. It may appear to stop or be locked up, and stay at 99% for a long time. Do not try to restart your computer during restructure—just be patient and let the program finish.

6. When the process is finished, click **Close**. You can now run the new version of Emonitor.



The amount of time needed for this process depends on your processor speed and the amount of RAM available.

Restoring your Emonitor configuration files

After you have restored the Emonitor database files, restore the Emonitor configuration files.



Note that the default directories for Emonitor version 3.70 configuration files on Windows 7 are different than they were on versions prior to 3.60.



If you are restoring configuration files from RSMACC EOL version 2.50, make sure that the .DCF and .EOL file names do not conflict with the same file types from Emonitor Online. If necessary, rename the .DCF and .EOL files from RSMACC EOL. We recommend using different .DCF and .EOL files for Emonitor EOL version 3.70 and Emonitor Online version 3.70.

The default directories for the Emonitor 3.70 configuration files are listed below.

- DCF Files (Windows 7)
C:\Users\Public\Documents\Rockwell Software\Emonitor\[PROFILE_NAME].DCF
- EOL Files (Windows 7)
C:\Users\Public\Documents\Rockwell Software\Emonitor\[PROFILE_NAME].EOL
- OnlineDataConsole.xml (Windows 7)
C:\Users\Public\Documents\Rockwell Software\Emonitor\OnlineDataConsole.xml



Edit the XML files and change all instances in the document from:

<XMProfile>C:\Program Files\Rockwell Software\Emonitor\

to:

<XMProfile>C:\Users\Public\Documents\Rockwell Software\Emonitor\

- Templates (Windows 7)
C:\Users\Public\Documents\Rockwell Software\Emonitor\Templates\English
C:\Users\Public\Documents\Rockwell Software\Emonitor\Templates\Metric
- Load and Unload directories (Windows 7)
C:\Users\Public\Documents\Rockwell Software\Emonitor\UD
C:\Users\Public\Documents\Rockwell Software\Emonitor\ld
- Online directory (Windows 7)
C:\Users\Public\Documents\Rockwell Software\Emonitor\Online
- EDS files are installed with Emonitor 3.70. If you backed up any custom EDS files, restore them to:
C:\Program Files\Rockwell Software\Emonitor\
- INI, EDI and EAX Files (Windows 7)
C:\Program Files\Rockwell Software\Emonitor\
(This is the same directory as for Emonitor 3.5)

Changing paths in oonline.edi

After you restore the oonline.edi file, you must edit the file to update the path information.

1. Shut down Emonitor if it is running.
2. Open C:\Program Files\Rockwell Software\Emonitor\oonline.edi with Windows Notepad or some other text editor.



3. Edit C:\Program Files\Rockwell Software\Emonitor\odonline.edi as follows:

[Source]

**DataFileConfigFile=C:\Program Files\Rockwell
Software\Emonitor\odonline.ini**

**DataFileDir=C:\Users\Public\Documents\Rockwell
Software\Emonitor\ud**

**DataFiles=C:\Users\Public\Documents\Rockwell
Software\Emonitor\ud*.ulf**

[Options]

**BackupPathnameOnError=C:\Users\Public\Documents\Rockwell
Software\Emonitor\online\backup**

**LogFilepathname=C:\Users\Public\Documents\Rockwell
Software\Emonitor\online\online.log**

4. Restart the Scheduler and OLDM_Service services.
- a. Click Start > Control Panel > Administrative Tools > Services.
 - b. Select Services (local) in the left side of the Services window.
 - c. Select SchedulrSvc in the right side of the Services window.
 - d. If the SchedulrSvc Status is Started, right-click on SchedulrSvc and select Stop.
 - e. Right-click on SchedulrSvc and select Start.
 - f. Select OLDM_Service in the right side of the Services window.
 - g. If the OLDM_Service Status is Started, right-click on OLDM_Service and select Stop.
 - h. Right-click on SchedulrSvc and select Start.

Index

A

- activation
 - see* FactoryTalk Activation
- activation key
 - see* CD Activation Key
- Adobe Reader, installing ■ 2
- ALARM table ■ 8

B

- backing up
 - configuration files ■ 25

C

- CATEGORY table ■ 8
- CD Activation Key ■ 2
- CFGORA.SQL creation script ■ 10, 11
- configuration files
 - backing up ■ 25
 - restoring ■ 32
- configuration files, backing up ■ 29
- connect string ■ 11, 16
- creating tablespaces ■ 8

D

- data collectors ■ 15
- data collectors, unloading ■ 27
- database
 - importing data ■ 11
 - restructure ■ 30
 - size ■ 7
 - table descriptions ■ 8
 - versions ■ 3, 7
- database alias, connect string ■ 16
- database client, versions ■ 3, 7
- database server, versions ■ 3, 7
- disk space requirements ■ 2
- documentation, Emonitor ■ 4

E

- Econfig user ■ 9, 10
- econfigd tablespace ■ 8
- econfigi tablespace ■ 8
- EDS files, installing ■ 17, 30
- EFWDBU32.EXE ■ 11
- Emonitor
 - configuration files, backing up ■ 25
 - configuration files, restoring ■ 32
 - documentation ■ 4
 - installing ■ 15
 - online components ■ 18
 - removing ■ 29
 - upgrading ■ 3, 25
- Emonitor Scheduler
 - service, starting ■ 19
 - starting ■ 19
- Emonitor Web ■ 22
- Entek user ■ 9, 10
- entekd tablespace ■ 8
- enteki tablespace ■ 8
- ENTEKORA.SQL file ■ 8, 10

F

- FactoryTalk Activation
 - installing ■ 13
 - upgrading ■ 28
- files
 - CFGORA.SQL ■ 10
 - configuration ■ 25, 32
 - EFWDBU32.EXE ■ 11
 - ENTEKORA.SQL ■ 8, 10
- firewall exceptions ■ 16

H

- HIERARCHY_LIST table ■ 8

I

- importing data ■ 11
- installation program
 - starting ■ 15
- installing
 - Adobe Reader ■ 2
 - EDS files ■ 17, 30
 - Emonitor ■ 13, 15
 - Emonitor Web ■ 22
 - FactoryTalk Activation ■ 13
 - online components ■ 18
 - planning for install ■ 2
 - RSLinx ■ 14, 28
 - Unload Station ■ 18
 - Viewing Station ■ 19
 - XML Gateway prerequisites ■ 14
- Internet Information Server ■ 22

L

- LOCATION table ■ 8

M

- measurement definitions ■ 25
- MEASUREMENT_DEF table ■ 8
- MULTI_VALUE_DATA table ■ 8

O

- online help ■ 4
- Online Import Event ■ 20
 - command line ■ 21
 - executable file ■ 21
 - Scheduler profile ■ 21
- online systems
 - installing components ■ 18
 - Unload Station ■ 18
 - Viewing Station ■ 19

P

- portable systems ■ 15
- profile ■ 19

R

- reading Emonitor documentation ■ 2, 4
- removing Emonitor ■ 29
- restoring
 - configuration files ■ 32
- restructure database ■ 30
 - running ■ 31
 - time required ■ 32
- Rockwell Automation Technical Support ■ 4
- RSLinx, installing ■ 14, 28
- RSMACC EOL
 - configuration files, backing up ■ 25
- running
 - installation program ■ 15
 - restructure ■ 31

S

- Scheduler
 - online import event ■ 19
 - profile ■ 19
 - setting up ■ 19
 - Storage Limit Updater ■ 19
- SINGLE_VALUE_DATA table ■ 8
- size, tablespaces ■ 7
- starting
 - Emonitor Scheduler ■ 19
 - Emonitor Scheduler service ■ 19
- Storage Limit Updater
 - command line ■ 21
 - executable file ■ 21
 - Scheduler profile ■ 21
 - setting up ■ 20
- system requirements ■ 1

T

- table descriptions ■ 8
- tables
 - ALARM ■ 8
 - CATEGORY ■ 8
 - HIERARCHY_LIST ■ 8
 - LOCATION ■ 8
 - MEASUREMENT_DEF ■ 8
 - MULTI_VALUE_DATA ■ 8
 - SINGLE_VALUE_DATA ■ 8



- tablespaces
 - creating ■ 8
 - econfigd ■ 8
 - econfigi ■ 8
 - entekd ■ 8
 - enteki ■ 8
 - size ■ 7
- Technical Support ■ 4

U

- uninstalling
 - Emonitor ■ 29
- unload files ■ 21
- Unload Station, installing ■ 18
- upgrading
 - back up configuration files ■ 29
 - Emonitor ■ 27
- upgrading Emonitor ■ 3

- users
 - Econfig ■ 9
 - Entek ■ 9
 - rights ■ 9

V

- version
 - database clients ■ 3, 7
 - database servers ■ 3, 7
 - Internet Explorer ■ 23
 - Internet Information Server ■ 23
- Viewing Station, installing ■ 19

W

- walk-around systems ■ 15
- Windows Firewall Configuration Utility ■ 16
- Windows Firewall exceptions ■ 16

X

- XML gateway ■ 14

-
-
- INSTALLING EMONITOR SOFTWARE WITH AN ORACLE MULTI-USER DATABASE
-
-