

FactoryTalk Batch View

Publication# FTBVS-QS001F-EN-D - November 2023 Supersedes Publication# TBVS-QS001E-EN-D - May 2022



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.

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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.



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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).

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.

	lable of Contents	3
	Preface	5
	About this manual	5
	Legal Notices	
	Additional resources	
	Chapter 1	
Install the FactoryTalk Batch	Cliapter 1	J
•	Chantan O	11
View server	Chapter 2	II
Set up the FactoryTalk Batch	_	
View client device	Browser requirements	
	Connect a FactoryTalk Batch View client to the FactoryTalk Batch	
	View server	11
	HTTPS certificates	12
	Single session self-signed certificates	12
	Permanent self-signed certificates	13
	Chapter 3	17
Start using FactoryTalk Batch	•	
View	Batches	17
	Prompts	18
	Equipment	
	Diagnostics	
	Profile	
	Chapter 4	
Novt stone	Ulaptel 7	∠ I
Next steps		

About this manual

This manual provides information about how to get started with the new FactoryTalk Batch View. It is one of a set of related manuals that describe installing, programming, and operating the FactoryTalk Batch system.



Tip: The modern FactoryTalk Batch View is an innovative and intuitive user interface for your comprehensive batch solution. It leverages state-of-the-art web technologies with scalable graphics for consistent visualization across all devices and form factors. The zero-install browser simplifies administration and maintenance. As the only native client application that supports the new features in FactoryTalk Batch and eProcedure, it is the client of the future for modern batch solutions.

For information about FactoryTalk Batch View (legacy) desktop version, view the FactoryTalk Batch View User Guide (FTBVS-UM001).

To review FactoryTalk Batch release notes and latest information regarding product compatibility refer to the <u>Product Compatibility and Download</u> Center (PCDC).

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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 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)\Rockwell Software\Batch View Server\docs\relnotes\OPENSOURCE

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.

Additional resources

This table is a comprehensive documentation list for the FactoryTalk® Batch products from Rockwell Automation.

Installation, Quick Start, and Getting Results Guides

Resource	Description
FactoryTalk Batch Components Installation and Upgrade Guide (BATCH-IN002)	Provides information and procedures for FactoryTalk Batch system installation. Includes information for FactoryTalk Batch Material Manager, FactoryTalk Event Archiver, and associated FactoryTalk Batch Client and Server components.
FactoryTalk Batch View Quick Start Guide (FTBVS-QS001)	Provides information about using FactoryTalk Batch View to create, view, and command control recipes, acknowledge prompts and signatures, view equipment phases and diagnostic information, and view profile information.
FactoryTalk Batch View HMI Controls Quick Start Guide (BATCH-QS001D)	Provides a general overview of FactoryTalk Batch View HMI Controls.
FactoryTalk Batch eProcedure® Getting Results Guide (BWEPRO-GR011)	Explains the basics of FactoryTalk Batch eProcedure.
FactoryTalk Batch Getting Results Guide (BATCH-GR011)	Introduces the basics of automated batch manufacturing and the FactoryTalk Batch product components.
FactoryTalk Batch Material Manager Getting Results Guide (BWMTR-GR011)	Introduces the basics of FactoryTalk Batch Material Manager.

User Guides

Resource	Description

Resource	Description
FactoryTalk Batch Material Editor User Guide (BWMTR-UM001)	Provides access to information and procedural instructions required to configure materials and the containers to hold them. The material data is stored in the material database, which is used to create material-based recipes. This information is intended as a reference for formulators.
FactoryTalk Batch Equipment Editor User Guide (BATCH-UM004)	Provides information on creating and maintaining an equipment database (area model). The area model is available to all other FactoryTalk Batch programs, including the Recipe Editor, Batch View, and Phase Simulator.
FactoryTalk Batch PhaseManager™ User Guide (BATCHX-UM011)	Describes the integration of the FactoryTalk Batch software with the Studio 5000 Logix Designer® application and the Logix 5000™ family of controllers. The integration simplifies the configuration and maintenance of the FactoryTalk Batch automation system, provides better communication between the FactoryTalk Batch Server and the Logix 5000 controller, and significantly reduces the programming effort required to develop the phase logic code that resides in your Logix 5000 controller.
FactoryTalk Batch Recipe Editor User Guide (BATCH-UM006)	Provides instructions on using FactoryTalk Batch Recipe Editor to create and configure master recipes for use in batch automation. The interface is based on IEC 61131-3 sequential function charts to organize recipes graphically into procedures, unit procedures, operations, and phases. Build recipes using either the SFC format or a table-based format.
FactoryTalk Batch View HMI Controls User Manual (FTBVS-UM003)	Provides details about using FactoryTalk Batch View HMI Controls to monitor and interact with the production process within a FactoryTalk View SE Display Client.
FactoryTalk Batch View User Manual (FTBVS-UM002)	Provides information and procedural instructions for using FactoryTalk Batch View in a modern and intuitive portal into a comprehensive batching solution for effective operations, leveraging its own web server using HTML5 technology to provide connectivity into a FactoryTalk Batch Server.
FactoryTalk Event Archiver User Guide (BATCH-UM012)	Provides information and instructions specific to the FactoryTalk Event Archiver. Intended for use by system administrators and production supervisors.

Administrator Guides

Resource	Description
FactoryTalk Batch Administrator Guide (BATCH-UM003)	Provides instructions for configuring security and services, and implementation and use of components not typically accessed or used by batch operators, such as the FactoryTalk Batch Server.
FactoryTalk Batch eProcedure Administrator Guide (BWEPRO-UM011)	Provides procedures specific to FactoryTalk Batch eProcedure, such as implementing security. Included are instructions for tasks specific to FactoryTalk Batch, such as configuring security and services to support FactoryTalk Batch eProcedure. Provides instructions on the implementation and use of components not typically accessed or used by batch operators, such as the FactoryTalk Batch Server.
FactoryTalk Batch Material Manager Administrator Guide (BWEPRO-UM011)	Provides information and instructions specific to FactoryTalk Batch Material Manager. Intended for use by system administrators and database administrators.

Reference Guides

Resource	Description

Resource	Description
FactoryTalk Batch Material Server API Reference Manual (BWMTR-RM001)	Provides access to information regarding the interface between the FactoryTalk Batch Material Server and the FactoryTalk Batch Material Editor and FactoryTalk Batch. It is intended to be used as a reference information by custom interface developers.
FactoryTalk Batch PCD Programming Reference Manual (BATCH-RM004)	Provides information and instructions about the FactoryTalk Batch PCD interface design. It is intended to be used as a reference guide for PCD programmers.
FactoryTalk Batch Server API Reference Manual (BATCH-RM003)	Provides information regarding the interface between the FactoryTalk Batch Server and FactoryTalk Batch View — the Server Application Programming Interface (API). It is intended to be used as a reference guide by custom interface developers.
FactoryTalk Batch System Files Reference Manual (BATCH-RM005)	Provides the technical information for configuration and maintenance of a FactoryTalk Batch system. It can be used as a reference information for implementation engineers and system administrators.
FactoryTalk Batch eProcedure Instruction File Design Reference Manual (BWEPRO-RM001)	Includes information about the building of manual nstruction files for manual phases in the equipment database This information is intended to be used as a reference by instruction file authors.

View or download publications at

http://www.rockwellautomation.com/literature. To order paper copies of technical documentation, contact your local Allen-Bradley® distributor or sales representative.

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.

Install the FactoryTalk Batch View server

Install FactoryTalk Batch View server to access data from the mobile devices and browsers on laptops and desktops using FactoryTalk Batch View, and to use the updated FactoryTalk View SE user controls.

To install Factory Talk Batch View server

- 1. Visit the <u>Product Compatibility and Download Center (PCDC)</u> to download the **FactoryTalk Batch components version 16.00**.
- 2. Run Setup.exe.
- 3. On the Setup page, select **Customize**.
- 4. On the **Customize** page:
 - Select FactoryTalk Batch View Server v3.00.
 - Clear all other selections.
 - Select Next.
- 5. On the **Options** page:
 - FactoryTalk Network Directory is required.
 - In **HTTPS Port** enter a port to use for the FactoryTalk Batch View Server. Port 3443 is the default and is the recommended port.
 - Select Next.
- 6. On the **System Details** page, complete these items:
 - Under **Server Node**, in **Name**, enter the name of the FactoryTalk Batch Server.
 - Under **User Account**, in **User Name**, enter the domain name\user name used to install the FactoryTalk Batch Server.
 - Select Install.
- 7. On the **End User License Agreements** page, review the agreement and select **Accept all**.
- 8. If prompted on the **That's it** page, restart the computer. .



Tip: The FactoryTalk Batch View Server does not automatically start after it is installed. Use the FactoryTalk Batch Service Manager to start FactoryTalk Batch View Server after installation.

See also

HTTPS certificates on page 12

Set up the FactoryTalk Batch View client device

After installing the FactoryTalk Batch View Server, you can use FactoryTalk Batch View to initiate and control the batch process. You can use a desktop computer or mobile device with FactoryTalk Batch View. The topics in this section provide guidance for using those devices successfully.

Browser requirements

FactoryTalk Batch View is designed for modern web browsers.

Most browsers can be used with FactoryTalk Batch View. However, the following browsers are recommended:

- Google Chrome[™] browser version 81 or later
- Microsoft Edge™ (based on Chromium) version 80.0.361.50 or later



The FactoryTalk Batch View Client has a minimum Landscape orientation of 480×960 pixels and a minimum Portrait orientation of 960×480 pixels.

Connect a FactoryTalk Batch View client to the FactoryTalk Batch View server

Following are instruction on how to connect a FactoryTalk Batch View client.

To connect a FactoryTalk Batch View client to the FactoryTalk Batch View server

- 1. On the client, open a browser.
- 2. Enter the URL for the FactoryTalk Batch View Server.



Tip: The URL must be in the form of https://[node].[port].com. For example: https://MyBatchViewServer.MyDomain.com

- [node]: The computer on which the FactoryTalk Batch Server and FactoryTalk Batch View Server are installed. The node value is either the IP address or the fully qualified node name.
- [port]: The default port number is 3443. If the FactoryTalk Batch View Service is installed
 on a different port, launch the client on the FactoryTalk Batch View Server machine to
 identify the port number in the URL. The port number is not shown in the URL if the default
 port number (3443) is in use.

For example:

- https://192.168.0.10 (IP address and the default port of 3443)
- https://192.168.0.10:4431 (IP address and a port number other than the default port of 3443)
- https://Win2019DC-ABC.domain1234.com (a fully qualified machine name and default port number)

3. On the FactoryTalk Batch View login page, enter your user name and password, and then select **Log On**.

HTTPS certificates

The FactoryTalk Batch View application uses a self-signed certificate created during the product installation on the server. Modern web browsers are designed to warn users when encountering self-signed certificates because they are not signed by a certificate authority (CA). Self-signed certificates do provide for secure, encrypted data transmission, but are not signed by a CA.

When using FactoryTalk Batch View for the first time in a browser, accept a self-signed certificate for a given session, or permanently store the certificate in the browser.

See also

Single session self-signed certificates on page 12

Permanent self-signed certificates on page 13

Single session self-signed certificates

When using FactoryTalk Batch View for the first time in a browser, accept a self-signed certificate for a given session.

Google Chrome

- 1. In the address bar, go to the URL generated during installation of the FactoryTalk Batch View server.
- 2. Select Advanced.
- 3. Select Proceed.

Microsoft Edge

- 1. In the address bar, go to the URL generated during installation of the FactoryTalk Batch View server.
- 2. Select Advanced.
- 3. Select Proceed.

Apple Safari

- 1. In the address bar, go to the URL generated during installation of the FactoryTalk Batch View server.
- 2. Select **Show Details**.
- 3. Select Visit this website.
- 4. Select Visit Website.

Mozilla Firefox

- 1. In the address bar, go to the URL generated during installation of the FactoryTalk Batch View server.
- 2. Select Advanced.
- 3. Select Accept the Risk and Continue.

See also

HTTPS certificates on page 12

Permanent self-signed certificates on page 13

Permanent self-signed certificates

If you want to permanently store the self-signed certificate, follow the steps for the browser.



Tip: Instructions may vary slightly based on browser updates.

Google Chrome

This procedure applies to Google Chrome version 118.

- 1. In Google Chrome, go to the URL generated during installation of the FactoryTalk Batch View server.
- 2. Open **Developer tools** by selecting *Ctrl* + *Shift* + *I*.
- 3. Select the **Security** tab.
- 4. Select View Certificate.
- 5. In the **Certificate** dialog box, select the **Details** tab to start the **Certificate Export Wizard**.
 - a. In the Certificate Export Wizard, select Export...
 - b. Browse to the location where you want to export the file, and enter a file name. Select **Save**.
 - c. Close the **Certificate** dialog.
- 6. In the Chrome browser, open **Settings**, and select **Privacy and security**.
- 7. Select **Security**.
- 8. Scroll down the page and select **Manage device certificates**.
- 9. In the **Certificates** dialog box, select the **Trusted Root Certification Authorities** tab, and then select **Import**.
- 10. In the **Certificate Import Wizard**, follow these steps:
- a. Select Next.
 - b. Select **Browse** and select the certificate file you saved, and then select **Open**.
 - c. Select Next.

- d. Select **Place all certificates in the following store** and verify that the **Certificate store** shows Trusted Root Certification Authorities.
- e. Select Next, and then select Finish.
- f. If the **Security Warning** dialog box is displayed, select **Yes** to install the certificate, and than select **OK**.
- g. In the **Certificates** dialog box, select **Close**.
- 11. Restart the Chrome browser.

Microsoft Edge

- 1. In Microsoft Edge, enter the URL generated during installation of the FactoryTalk Batch View server.
- 2. Open **Developer tools** by selecting Ctrl + Shift + I.
- 3. Select the **Security** tab.
- 4. Select View Certificate.
- 5. In the **Certificate** dialog box, select the **Details** tab to start the **Certificate Export Wizard**.
- a. In the Certificate Export Wizard, select Export...
 - b. Browse to the location where you want to export the file and enter a file name. Select **Save**.
 - c. Close the **Certificate** dialog.
- 6. In the Microsoft Edge browser, open **Settings**, and select **Privacy**, **search**, **and services**.
- 7. Under Security, select Manage certificates.
- 8. In the Certificates dialog box, select the **Trusted Root Certification Authorities** tab, and then select **Import**.
- a. Select Next.
 - b. Select **Browse** and select the certificate file you saved, and then select **Open**.
 - c. Select Next.
 - d. Select **Place all certificates in the following store** and verify that the **Certificate store** shows Trusted Root Certification Authorities.
 - e. Select **Next**, and then select **Finish**.
 - f. If the **Security Warning** dialog box is displayed, select **Yes** to install the certificate, then select **OK**.
 - g. In the **Certificates** dialog box, select **Close**.
- 9. Restart the Edge browser.

Apple Safari

- 1. In the address bar, go to the URL generated during installation of the FactoryTalk Batch View server.
- 2. Select Show Details.
- 3. Select **Visit this website.**
- 4. Select **Visit Website**.

Mozilla Firefox

- 1. In the address bar, go to the URL generated during installation of the FactoryTalk Batch View server.
- 2. Select **Advanced**.
- 3. Select Accept the Risk and Continue.

See also

Single session self-signed certificates on page 12

HTTPS certificates on page 12

Start using FactoryTalk Batch View

Use FactoryTalk® Batch View™ to initiate and control the batch process. A batch is a running control recipe. The material produced by a single execution of a recipe is also considered a batch.

- Use Batches to create, view, and command a control recipe, observe the execution of a single recipe, and bind units for class-based recipes.
- Use Prompts to alert operators to value requests for parameters, unit binding, material binding, and signatures or manual instructions.
- Use Equipment for an equipment-centric view of the defined area model. There are three levels of equipment: process cell, unit, and phase.
- Use Diagnostics to view server and service status, server performance, server statistics, arbitration, and journals.
- Use Profile to change the default language, view assigned groups, enable or disable the minimal view, and view authorization settings

Use Batches to create, view, and command a control recipe, observe the execution of a single recipe, and bind units for class-based recipes. Once a control recipe is created, it remains in the **Batches** list until it is removed or until the FactoryTalk Batch Server is restarted with a cold boot. A graphical representation of a running batch and its associated data is displayed.

Try it: Create a control recipe

- 1. Select Batches.
- 2. Select **Add**
- 3. Select a master recipe.
- 4. Enter a unique batch ID.



Tip: The **Batch ID** box accepts non-unique IDs. When duplicate batch IDs are used, it is difficult to associate prompts with the correct batch when viewed in Prompts.

- 5. (optional) Perform any of these:
 - To run a batch at a percentage other than 100%, in the **Batch Scale** box, enter the percentage.
 - To change the description of the batch, in the **Description** box, enter a new description.
 - If the recipe contains a material class-based phase, select the material to use in this particular batch.

Batches

- To assign or change a formula value, enter new values in **Formula Values.**
- Select the equipment for the control recipe in the **Unit Bindings** area. The **Unit Binding** area appears after selecting all required parameters. By default, the equipment is not selected. The user must configure the equipment manually. A unit binding error appears if a configuration error occurs. For detailed information, Select **Select for details**.
- 6. Select **Create** to add the control recipe to the **Batches** list.

Use Prompts to alert operators to value requests for parameters, unit binding, material binding, and signatures or manual instructions. A control recipe cannot complete execution until the operator provides the requested information. In most cases, pending requests for information (value prompts, signatures, or manual instructions) are not acknowledged until a user either provides the information or stops or aborts the control recipe.

- Value prompts alert operators to requests for parameter values, unit binding, and material phase/container binding.
- Signatures are requests for signoffs that require user permissions and optional comments. When a signature is generated against a control recipe, acknowledge the signature by completing the associated signoffs. The requested user information in a signature is determined by the signature template defined in the area model.
- Instructions are individual steps of a manually executed phase. As a batch executes, the instruction for each active step appears.

 Instructions execute in the order specified within the master recipe.

Try it: Acknowledge a prompt

- 1. Select **Prompts**.
- 2. Select the prompt to acknowledge.
- 4. If the prompt has associated signature(s), sign off on the prompt to complete the acknowledgment.

Equipment

Use **Equipment** for an equipment-centric view of the defined area model. The FactoryTalk Batch Equipment Editor defines the equipment that appears.

There are three levels in **Equipment** displayed: process cell, unit, and phase or operation sequence. Each level includes run-time data and other information for each resource. From the phase level, you can view phase-specific information and run phases or operation sequences manually, independent of recipes.

Prompts

In **Equipment**, view the area model hierarchy using different views:

- **List view** (default): Each item lists different values depending on the window size: either mobile or desktop size. More fields are available in desktop size.
- **Diagram view**: Process cells, units, and phases or operation sequences appear as graphical elements in the area model.
 - Zoom in, zoom out, and zoom to fit buttons on the top left of the diagram view.
 - The top right of the diagram view describes which equipment level is being viewed: process cells, units, or phases/operation sequences.
- **Phase Summary view**: View all phases or operation sequences for all units in all process cells at once in a list type view.

Try it: View process cells, units, and phases or operation sequences

- 1. Select **Equipment**.
- 2. To the right of the **Filter** box, select a display type:
 - Select **List** to view the **Equipment** levels as a list of items.
 - Select **Diagram** to view the **Equipment** levels as graphical elements in the area model.
 - Select **Phase Summary** to view all phases or operation sequences at once in a list-type view.

Use **Diagnostics** to view server and service status, server performance, server statistics, batch event journals, and arbitration information.

- **Status** view version and connection information for the FactoryTalk Batch View, FactoryTalk Batch Server, FactoryTalk Services, eProcedure Server, and FactoryTalk Activation. Displays the status of configured data servers and services.
- **Server** view server performance, hardware, and software information.
- **Statistics** view information on connections, equipment model file name and save time, and perform tag verification.
- **Journals** view a list of all available event journals.
- **Arbitration** view, acquire, release, and reorder system elements.

Try it: View the server information

- 1. Select **Diagnostics**.
- 2. Select Server.
- 3. View the appropriate server information.
 - **Uptime**: View the uptime for the operating system, FactoryTalk Batch Server, and the FactoryTalk Batch View Service.

Diagnostics

- Memory: View the total amount of memory used, the amount of free memory available, and the amount of memory being used by the FactoryTalk Batch View Service.
- **Disk**: View the total amount of disk space and the amount of free disk space available.

Profile

Use **Profile** to:

- View a logged-in user and its assigned groups
- Change the default language
- Enable or disable the minimal view
- View authorization settings

Try it: View profile information

- 1. Select **Profile** \(\textit{\textit{\textit{\textit{2}}}}\).
- 2. To change the default language for Batch View, select a language from the list.



- Viewing the profile from within the full HMI User Control, the language settings are unavailable. HMI User Controls Language settings are controlled by FactoryTalk View SE.
- Only languages configured for the application display in the menu.
- 3. In the **Display Type**, select **Minimal** or **Normal**. **Normal** is the default display type.



Tip: Changing the **Display Type** applies to **Batches** and **Prompts** only.

4. View the list of authorizations allowed for this profile.

Next steps

This guide has provided you a quick overview about working with FactoryTalk Batch View. For more information refer to either the FactoryTalk Batch View online help or the <u>FactoryTalk Batch User Manual (FTBVS-UM002)</u>.

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

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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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