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FactoryTalk® Historian SE



INSTALLATION ASSISTANT

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Preface

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Overview

This document is addressed to the users that intend to set up a new FactoryTalk Historian environment.

FactoryTalk Historian Site Edition (SE) provides the capability to collect, store, analyze, and visualize data using a powerful engine and a set of reporting tools such as time-series trends, bar charts, pie charts, Pareto charts, tabular trends, and a method of generating reports using Microsoft Excel. It also uses compressed-storage data algorithms to contain a vast amount of data in a small format.

You will find here the following information:

- A description of the role-based FactoryTalk Historian architecture. (page 11)
- A short introduction to the FactoryTalk Historian SE security. (page 14)
- Installation steps for the FactoryTalk Historian core components. (page 21)
- Installation steps for the FactoryTalk Historian SE suites. (page 25)

Individual components of the FactoryTalk Historian SE and FactoryTalk family products may be referred to in this document using the following abbreviations:

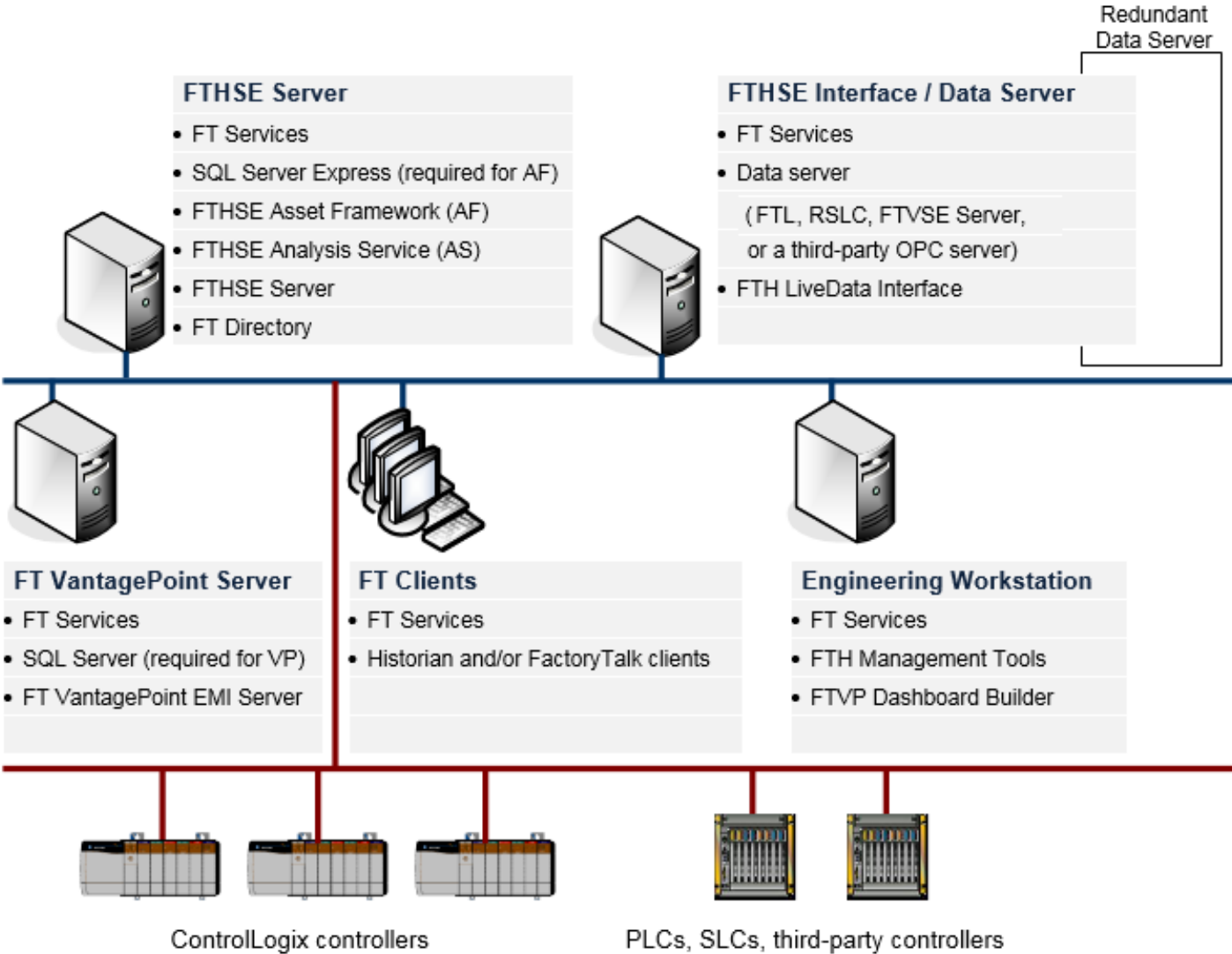
Abbreviation	Description
FT	FactoryTalk
FTAM	FactoryTalk Activation Manager
FTAC	FactoryTalk Administration Console
FTAS	FactoryTalk Historian Analysis Service

Abbreviation	Description
FTAF	FactoryTalk Historian Asset Framework
FTD	FactoryTalk Directory
FTHDL	FactoryTalk Historian DataLink Client
FTH	FactoryTalk Historian
FTHSE Server	FactoryTalk Historian Site Edition Server
FTHPB	FactoryTalk Historian ProcessBook
FTL	FactoryTalk Linx
FTSR	FactoryTalk Services
FTVP	FactoryTalk VantagePoint
FTVP Server	FactoryTalk VantagePoint Server
FTVSE	FactoryTalk View Site Edition HMI
ICU	Interface Configuration Utility
KB	Rockwell Automation Knowledgebase
RSLC	RSLinx Classic
SMT	System Management Tools

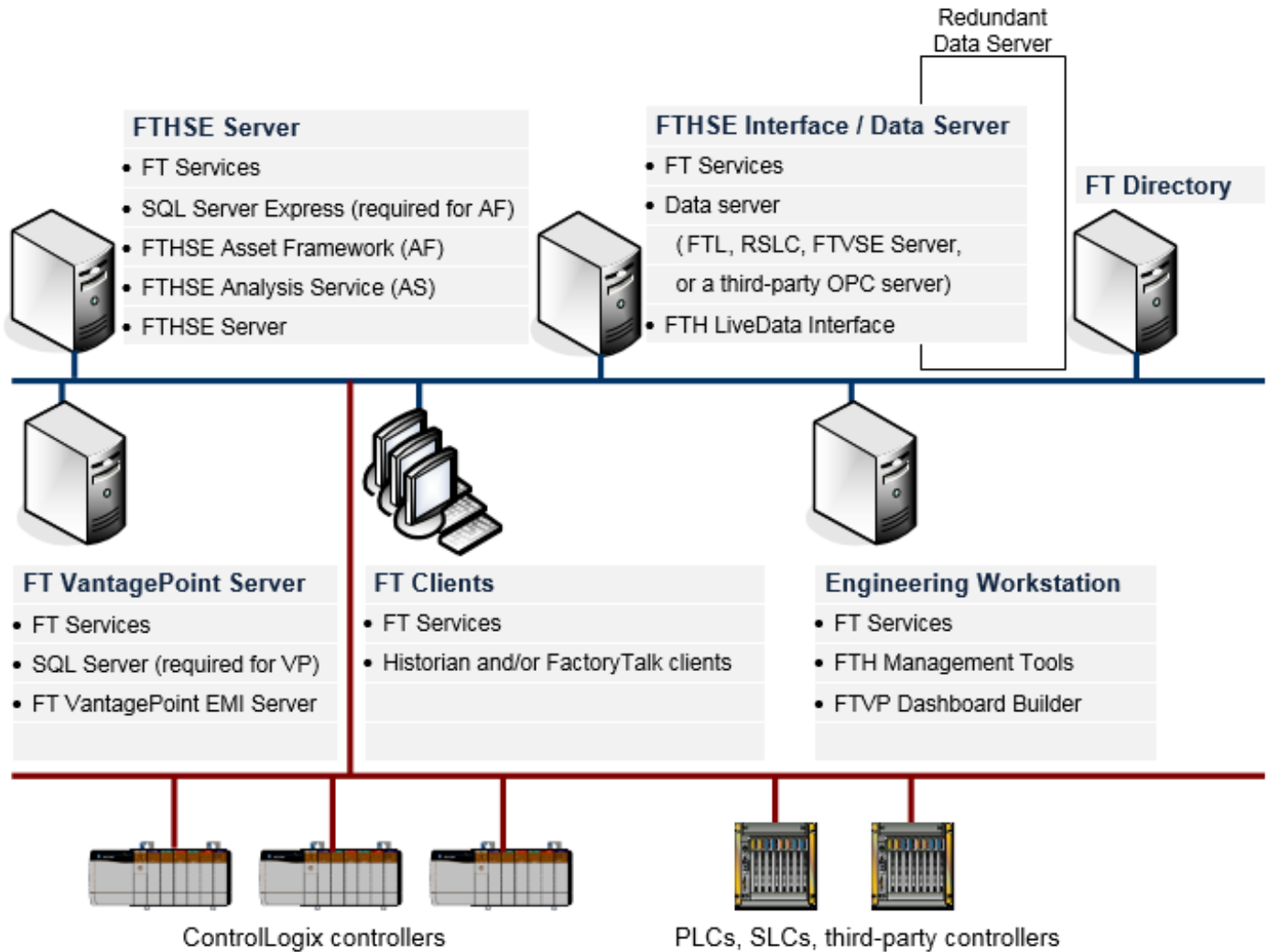
Role-based installation steps

The drawings below present typical architectures of the FactoryTalk Historian SE system.

A Historian SE architecture with FactoryTalk Directory installed on the Historian server computer:



A Historian SE architecture with FactoryTalk Directory installed on a separate computer:



The machines shown in the drawings adopt the following roles:

Role	Description
FTHSE Server (page 15)	<p>A computer with the following components installed:</p> <p>Required:</p> <ul style="list-style-type: none"> • FactoryTalk Services, including: <ul style="list-style-type: none"> • FactoryTalk Activation Manager • Microsoft SQL Server Express (required for Asset Framework) • FactoryTalk Historian Asset Framework Server • FactoryTalk Historian Analysis Service (optional) • FactoryTalk Historian Analysis Service • FactoryTalk Historian SE Server <p>Optional:</p> <ul style="list-style-type: none"> • FactoryTalk Directory <p>Note: Alternatively, FactoryTalk Directory may be installed on a separate computer.</p>
FTHSE Interface / Data Server (page 16)	<p>A computer with the following components installed:</p> <ul style="list-style-type: none"> • FactoryTalk Services, including: <ul style="list-style-type: none"> • FactoryTalk Activation Manager (optional) • Data server (FTL or RSLC or FTVSE Server or a third-party OPC Server) <p>Note: FactoryTalk Linx is a part of the FactoryTalk Services installation.</p> • FactoryTalk Historian Live Data Interface
FT VantagePoint Server	<p>A computer with the following components installed:</p> <ul style="list-style-type: none"> • FactoryTalk Services, including: <ul style="list-style-type: none"> • FactoryTalk Activation Manager • Microsoft SQL Server (required for VantagePoint) • FactoryTalk VantagePoint EMI Server <p>For installation and configuration steps, refer to the <i>FactoryTalk VantagePoint Getting Results Guide</i>, available on the FactoryTalk VantagePoint installation DVD.</p> <p>This document assumes that the FTVP Server will be installed on its own computer. If you have a small application and you want to install the FTVP Server on the same computer as the FTHSE server, refer to the KB article 62869 (https://rockwellautomation.custhelp.com/app/answers/detail/a_id/62869) for installation and configuration details.</p>

Role	Description
FT Clients (page 17)	<p>Computers with the following components installed:</p> <ul style="list-style-type: none"> • FactoryTalk Services, including: <ul style="list-style-type: none"> • FactoryTalk Activation Manager (optional) • Any of the following clients: <ul style="list-style-type: none"> • FactoryTalk Historian ActiveView • FactoryTalk Historian BatchView • FactoryTalk Historian DataLink • FactoryTalk Historian ProcessBook • FactoryTalk View SE (Server, Studio or Client). This client requires the Historian Connectivity option, which is a part of the FactoryTalk View installation media. • FactoryTalk VantagePoint Client <p>FTVP clients (Trend, Excel Add-in, or Portal) are not covered in this document since they are web-based clients and their necessary components are downloaded through your web browser.</p>
Engineering Workstation (page 18)	<p>A computer with the following components installed:</p> <ul style="list-style-type: none"> • FactoryTalk Services, including: <ul style="list-style-type: none"> • FactoryTalk Activation Manager to function as the FactoryTalk Activation Server • FactoryTalk Historian SE Management Tools • FactoryTalk VantagePoint Dashboard Builder <p>This computer is used for the administration of your FTHSE Server. The tasks that may be performed on this computer include:</p> <ul style="list-style-type: none"> • Assigning FTHSE activations. • Creating points using the auto-discovery feature, searching individual points, using the Excel Tag Configurator.

Security setup

FactoryTalk Historian SE uses Windows integrated security for the FactoryTalk Historian Server.

In Windows (*Workgroup*) or Active Directory (*Domain*), create your Historian user and/or groups. The users and/or groups you have created will be mapped to Historian users and/or groups. By default, four Historian groups are created for you within the FTHSE Server (*FTHAdministrators*, *FTHEngineers*,

FTHOperators and *FTHSupervisors*). They are described in detail in the *FactoryTalk Historian SE Installation and Configuration Guide*, chapter "Securing the Historian server".

NOTE

The complete user documentation on FactoryTalk Historian SE is divided into individual suites and is available in the following subfolders of the **Common Files\Rockwell\Help** folder in your **Program Files (x86)** directory:

- FactoryTalk Historian SE <version> Server
- FactoryTalk Historian SE <version> Management Tools
- FactoryTalk Historian SE <version> Asset Framework
- FactoryTalk Historian SE <version> Live Data Interface

The documentation is also available in the **Redist\Docs** folder on your FactoryTalk Historian SE installation media.

FTHSE Server

Installation

For this role, install the following components:

- FactoryTalk Services (page 22), including FactoryTalk Activation Manager
- Microsoft SQL Server Express (required for Asset Framework) (page 21)
- FactoryTalk Historian Asset Framework Server (page 25)
- FactoryTalk Historian Analysis Service (page 25)
- FactoryTalk Historian SE Server (page 26)

Configuration

- Verify that the **Specify FactoryTalk Directory Location** utility points to the computer with the FactoryTalk Directory installed.

- Verify that the FactoryTalk Activation Manager has local license activations or points to your remote FactoryTalk Activation Server and that the activations are installed.
- In the FactoryTalk Administration Console, register your FTHSE Server and assign to it point licenses resulting from the license activations.
- In the System Management Tools, create mappings for your Windows/Active Directory groups to the default Historian groups (*FTHAdministrators*, *FTHEngineers*, *FTHOperators* or *FTHSupervisors*).

A quick start configuration:

1. Go to **System Management Tools > Security > Mappings & Trusts > New Mapping**.
2. Map your current Windows/Domain user to the **piadmin** PI Identity.

FTHSE Interface / Data Server

Installation

For this role, install the following components:

- FactoryTalk Services (page 22), including FactoryTalk Activation Manager (optional)
- Data server: FTL, RSLC, FTVSE Server, or a third-party OPC Server.

NOTE

FactoryTalk Linx (FTL) is a part of the FactoryTalk Services installation (page 22).

- FactoryTalk Historian Live Data Interface (page 26)

Configuration

- Verify that the **Specify FactoryTalk Directory Location** utility points to the computer with the FactoryTalk Directory installed.
- In the FactoryTalk Administration Console, verify that your FactoryTalk application references the data server installed on this computer.

- Verify that the Windows user has been mapped in the System Management Tools to the appropriate default Historian group.
- Use **About PI-SDK** (the PI SDK Utility) to create a PI Server Connection back to your FTHSE Server.
- In the FactoryTalk Administration Console:
 - Delete the local FTLD Interface on your FTHSE Server.
 - Create a new FTLD Interface (referencing the remote computer name) under your FTHSE Server and start the service.
- In the Interface Configuration Utility:
 - Configure the Interface Buffering subsystem.
 - Configure the disconnected startup with point catching.
 - Verify that the Interface is set to automatic startup.
- In the System Management Tools:
 - Verify that a trust exists in your FTHSE Server to allow the Interface to connect.

The **Trust_FTLDInterface** application trust is created by default for the *FTLDE* application.

FT Clients

Installation

For this role, install the following components:

- FactoryTalk Services (page 22), including FactoryTalk Activation Manager (optional)
- Any of the following clients:
 - FactoryTalk Historian ActiveView
 - FactoryTalk Historian BatchView
 - FactoryTalk Historian DataLink
 - FactoryTalk Historian ProcessBook
 - FactoryTalk View SE (Server, Studio or Client)

- PI Software Development Kit for ViewSE

NOTE

The FactoryTalk View SE Client requires the Historian Connectivity option, which is a part of the FactoryTalk View installation media.

- FactoryTalk VantagePoint Client

Configuration

- Verify that the **Specify FactoryTalk Directory Location** utility points to the computer with the FactoryTalk Directory installed.
- For any of the clients, verify that the Windows user has been mapped in the System Management Tools to the appropriate default Historian group.
- Use **About PI-SDK** (or the PI SDK Utility) to create a PI Server Connection back to your FTHSE Server.

Engineering Workstation

Installation

For this role, install the following components:

- FactoryTalk Services (page 22), including FactoryTalk Activation Manager to function as the FactoryTalk Activation Server
- FactoryTalk Historian SE Management Tools (page 27)
- FactoryTalk VantagePoint Dashboard Builder

Configuration

- Verify that the **Specify FactoryTalk Directory Location** utility points to the computer with the FactoryTalk Directory installed.
- Verify that the FactoryTalk Activation Manager points to your FactoryTalk Activation Server and activations are installed.
- Verify that the Windows user has been mapped in the System Management Tools to the appropriate default Historian group.
- Use **About PI-SDK** (the PI SDK Utility) to create a PI Server Connection back to your FTHSE Server.

Install core components

Follow the instructions below to install the following core components of the FactoryTalk Historian SE system:

1. Microsoft SQL Server Express (page 21)
2. FactoryTalk Services (page 22)

Install Microsoft SQL Server Express

Microsoft SQL Server is a requirement for running FactoryTalk Historian Asset Framework.

FactoryTalk Historian SE supports Microsoft SQL Server Express and Standard Editions. SQL Server Express Edition is available on the FactoryTalk Historian SE installation media. If you choose to use the SQL Standard Edition, please acquire appropriate Client Access Licenses (CAL) and/or processor licenses from Microsoft. For more information, refer to the Microsoft site (<http://www.microsoft.com/sqlserver/en/us/get-sql-server/how-to-buy.aspx>).

NOTE

For information on supported versions of SQL Server, see the FactoryTalk Historian SE Release Notes and/or the Rockwell Automation Product Compatibility and Download Center (<http://www.rockwellautomation.com/rockwellautomation/support/pcdc.page>).

If you already have an SQL Server, you will be able to point to it during the installation of FactoryTalk Historian Asset Framework.

To install Microsoft SQL Server 2016 Express:

1. Run the FactoryTalk Historian SE installation wizard.

2. On the welcome page of the installation wizard, click **Install FactoryTalk Historian Site Edition > Install FactoryTalk Asset Framework > Install Microsoft SQL Server 2016 Express**.
3. Follow the on-screen instructions to complete the process.

NOTES

- For more information on installing Microsoft SQL Server 2016 Express, refer to the product documentation.
 - We recommend that you use the default settings during the installation of Microsoft SQL Server Express
4. Restart the computer, if prompted.

Install FactoryTalk Services

FactoryTalk Services consists of the following components:

- FactoryTalk Services Platform with FactoryTalk Directory

FactoryTalk Services Platform is an underlying architecture and a set of common services (such as diagnostic messages, health monitoring services, access to real-time data, and shared plant resources such as tags and graphic displays) that Rockwell Automation products build upon. It is a prerequisite for all FactoryTalk-enabled software products.

- FactoryTalk Activation Manager

FactoryTalk Activation Manager allows you to download activation files using an Internet connection, and transfer the activation files to a computer that does not have an Internet connection. Install this software on the same computer as the FactoryTalk Directory server.

- FactoryTalk Linx

FactoryTalk Linx is a FactoryTalk Live Data server and a device-based alarm and event server. FactoryTalk Linx links Allen-Bradley networks and devices to Microsoft Windows products such as the FactoryTalk View SE (HMI software) and the RSLogix family of device programming software. FactoryTalk Linx provides FactoryTalk

Historian SE with the data points (tags) it collects from Rockwell Automation controllers.

NOTE

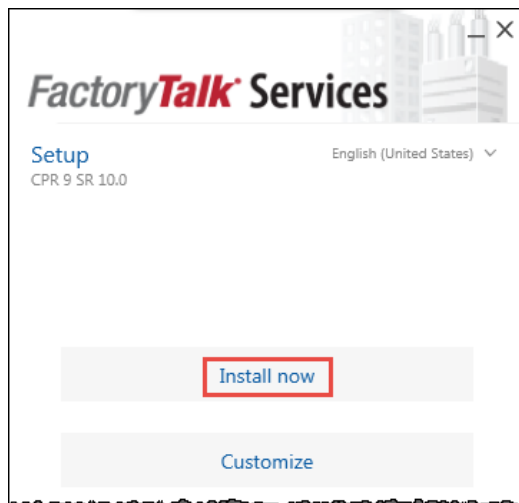
It is recommended to install FactoryTalk Linx (Data Server) on the same machine as FactoryTalk Historian Live Data Interface, remote from the FactoryTalk Historian SE server.

- FactoryTalk Alarms and Events (optional)

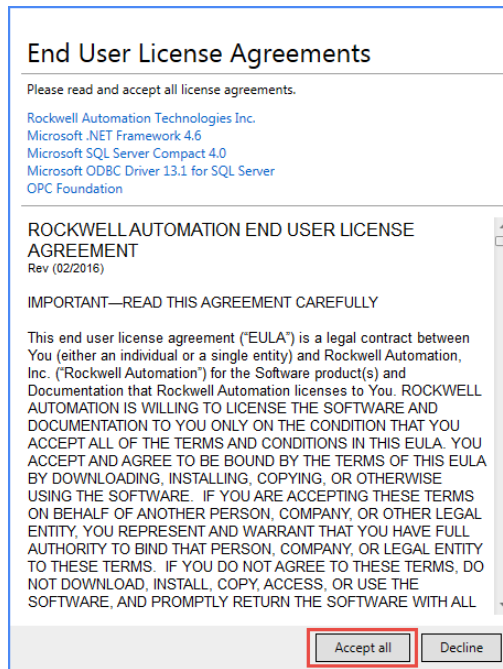
FactoryTalk Alarms and Events provide a common, consistent view of alarms and events throughout a FactoryTalk system.

To install FactoryTalk Services:

1. Run the FactoryTalk Historian SE installation wizard.
2. On the welcome page of the installation wizard, click **Install FactoryTalk Historian Site Edition > Install FactoryTalk Services > Install FactoryTalk Services** and follow the screenshots listed:



3.



NOTE FactoryTalk Alarms and Events is not used in the FactoryTalk Historian SE installation.

5. Follow any on-screen instructions.

TIP You may omit restarting the computer after the FactoryTalk Services installation is complete.

Perform FactoryTalk activations

To perform the FactoryTalk activation:

1. Search for and open **FactoryTalk Activation Manager**
2. Follow the instructions displayed in the window to configure your activations.

NOTE Click **Help** for more information, or refer to the instructions from the *Activate Rockwell Software Products* leaflet, available with your product installation package.

Install FactoryTalk Historian Site Edition

Follow the instructions below to install the following suites of the FactoryTalk Historian SE system:

1. FactoryTalk Historian Asset Framework (page 25)
2. FactoryTalk Historian Analysis Service (page 25)
3. FactoryTalk Historian SE Server (page 26)
4. FactoryTalk Historian Live Data Interface (page 26)
5. FactoryTalk Historian SE Management Tools (page 27)

Install FactoryTalk Historian Asset Framework

NOTE

FactoryTalk Historian Asset Framework is a prerequisite for installing FactoryTalk Historian SE.

To install FactoryTalk Historian Asset Framework:

1. Run the FactoryTalk Historian SE installation wizard.
2. On the welcome page of the installation wizard, click **Install FactoryTalk Historian Site Edition > Install FactoryTalk Historian Asset Framework > Install FactoryTalk Historian AF Server**.
3. Follow the on-screen instructions to complete the process.

Install FactoryTalk Historian Analysis Service

NOTE

FactoryTalk Historian Asset Framework is a prerequisite for installing FactoryTalk Historian SE.

To install FactoryTalk Historian Analysis Service:

1. Run the FactoryTalk Historian SE installation wizard.

2. On the welcome page of the installation wizard, click **Install FactoryTalk Historian Site Edition > Install FactoryTalk Historian Analysis Service**.
3. Follow the on-screen instructions to complete the process.

Install FactoryTalk Historian SE Server

To install FactoryTalk Historian SE server:

1. Run the FactoryTalk Historian SE installation wizard.
2. On the welcome page of the installation wizard, click **Install FactoryTalk Historian Site Edition > Install FactoryTalk Historian Server**.
3. Follow the on-screen instructions to complete the process.

Install FactoryTalk Historian Live Data Interface

The FactoryTalk Historian Live Data Interface collects data points (tags) from the data server and passes them to the FactoryTalk Historian SE server.

Install the FactoryTalk Historian Live Data Interface component on the same computer as the data server and separate from the computer that has the FactoryTalk Historian SE server installed.

After installing the interface, configure the buffering service on the Historian interface computer. The buffering service stores data in its memory so that in the event the interface is not able to communicate with the FactoryTalk Historian SE server, the data will not be lost.

By default, the FactoryTalk Historian Live Data Interface is installed during the installation of the FactoryTalk Historian SE Server. Such a configuration is typically used for demonstration purposes rather than real-life production environments. It is recommended to install the FactoryTalk Historian Live Data Interface on a data server computer.

To install FactoryTalk Historian Live Data Interface:

1. Run the FactoryTalk Historian SE installation wizard.

2. On the welcome page of the installation wizard, click **Install FactoryTalk Historian Site Edition > Install FactoryTalk Historian Live Data Interface**.
3. Follow the on-screen instructions to complete the process.

Install FactoryTalk Historian SE Management Tools

To install FactoryTalk Historian SE Management Tools:

1. Run the FactoryTalk Historian SE installation wizard.
2. On the welcome page of the installation wizard, click **Install FactoryTalk Historian Site Edition > Install FactoryTalk Historian Management Tools**.
3. Follow the on-screen instructions to complete the process.

Technical support and resources

Rockwell Automation provides 24/7 dedicated technical support internationally.

You can read complete information about technical support options, and access all of the following resources at the Rockwell Automation Support Web site (<http://www.rockwellautomation.com/support/>).

Before you call or write for help

When you contact Rockwell Automation Technical Support, please provide:

- Product name, version, and/or build numbers.
- Computer platform (CPU type, operating system, and version number).
- The time that the difficulty started.
- The message log(s) at that time. Consult your product documentation on the location of the message log files.

Find the version and build numbers

To find version and build numbers for each Historian Server subsystem (which vary depending on installed upgrades, updates, or patches), use either of the following methods:

To check the numbers with System Management Tools (SMT):

1. Search for **System Management Tools** in Windows Search, and then open it.
2. Under **Collectives and Servers**, select the name of the server you want to check.

3. Under **System Management Tools**, select **Operation > PI Version**.

The **Version in Memory** and **Version on Disk** columns display information on versions of all the server subsystems.

If you do not have System Management Tools installed, open a command prompt, change to the **pi\adm** directory, and type *piversion -v*. To see individual version numbers for each subsystem, change to the **pi\bin** directory and type the subsystem name followed by the option *-v* (for example, *piarchss.exe -v*).

View computer platform information

To view platform specifications, press **Windows + R** to open the **Run** dialog box, and then type `msinfo32.exe`.

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Rockwell Automation Support

Rockwell Automation provides technical information on the Web to assist you in using its products. At <http://www.rockwellautomation.com/support/> you can find technical and application notes, sample code, and links to software service packs. You can also visit our Support Center at <https://rockwellautomation.custhelp.com/> for software updates, support chats and forums, technical information, FAQs, and to sign up for product notification updates.

In addition, we offer multiple support programs for installation, configuration, and troubleshooting. For more information, contact your local distributor or Rockwell Automation representative, or visit <http://www.rockwellautomation.com/services/online-phone>.

Installation Assistance

If you experience a problem within the first 24 hours of installation, review the information that is contained in this manual. You can contact Customer Support for initial help in getting your product up and running.

United States or Canada	1.440.646.3434
Outside United States or Canada	Use the Worldwide Locator at http://www.rockwellautomation.com/rockwellautomation/support/overview.page , or contact your local Rockwell Automation representative.

New Product Satisfaction Return

Rockwell Automation tests all of its products to help ensure that they are fully operational when shipped from the manufacturing facility. However, if your product is not functioning and needs to be returned, follow these procedures.

United States	Contact your distributor. You must provide a Customer Support case number (call the phone number above to obtain one) to your distributor to complete the return process.
Outside United States	Please contact your local Rockwell Automation representative for the return procedure.

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