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**Index**
Summary of changes

This manual includes new and updated information. Use these reference tables to locate changed information.

Grammatical and editorial style changes are not included in this summary.

Global changes

None in this release.

New or enhanced features

This table contains a list of topics changed in this version, the reason for the change, and a link to the topic that contains the changed information.

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About this publication

This Quick Start Guide provides you with information on using FactoryTalk Services Platform with FactoryTalk Security.

Before using this guide, review the FactoryTalk Services Platform Release Notes for information about required software, hardware, and anomalies.

After using this guide, you will be more familiar with how FactoryTalk Services Platform uses:
• FactoryTalk Directory types
• User accounts
• Computer accounts
• Local and network security options
• Authentication methods
• Password management
• Security policies

Additional resources

For more information on the products and components discussed in this guide, the following manuals and Help files are available with the software:

• FactoryTalk® Help – Go to Rockwell Software > FactoryTalk Tools > FactoryTalk Help
• FactoryTalk View Installation Guide or FactoryTalk View Help – Go to Rockwell Software > FactoryTalk View > User Documentation and then select the appropriate Help or User Guide.
• FactoryTalk® Linx™ Help – Go to Rockwell Software > FactoryTalk Linx > FactoryTalk Linx Online Reference.
• RSLinx® Classic Help – Go to Rockwell Software > RSLinx > RSLinx Classic Online Reference.
• Studio 5000 Logix Designer® application Help – In Logix Designer, select Help > Contents
• FactoryTalk® Transaction Manager Help
• FactoryTalk® AssetCentre Help

The Rockwell Automation® Literature Library also has related Getting Results Guides that can be viewed online or downloaded:

• FactoryTalk Linx Getting Results Guide - Rockwell Automation Publication LNXENT-GR001_-EN-E
• RSLinx Classic Getting Results Guide - Rockwell Automation Publication LINX-GR001_-EN-E
• FactoryTalk Batch Getting Results Guide - Rockwell Automation Publication BATCH-GR011_-EN-P
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Environmental compliance

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Customer Support Telephone — 1.440.646.3434

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Chapter 1

About FactoryTalk systems

A FactoryTalk® system is composed of software products, services, and hardware devices participating together and sharing the same FactoryTalk Directory and FactoryTalk services.

For example, a FactoryTalk system may be as simple as FactoryTalk® Services Platform, FactoryTalk View, RSLinx® Classic, and RSLogix™ 5 all installed on the same computer, communicating with a single programmable logic controller, and all participating in the same local application held in a local directory.
A FactoryTalk system may be much more complex, with software products and hardware devices participating in multiple network applications distributed across a network, all sharing the same network directory.

A single computer can host both a local directory and a network directory. The two directories are completely separate and do not share any information. When using both directories, that single computer participates in two separate FactoryTalk systems.

In the network directory example above, the directory hosts two network applications: Waste Water and Water Distribution. All of the areas, data servers, HMI servers, device servers, and alarm and event servers organized within each application are specific to that application. None of the application-specific information is shared with any other application in the directory. However, all information and settings organized within the System folder, such as security settings, system policies, product policies, and user accounts apply to all applications held in the directory.

For example, modifying security settings in the Waste Water application does not affect the Water Distribution application. However, making a change to a security policy applies the change to both the Waste Water application and the Water Distribution application. The security policy settings also apply to any other new applications created in this same network directory.
The FactoryTalk Directory is the centerpiece of the FactoryTalk Services Platform. FactoryTalk Directory provides a central lookup service for all products participating in an application. Rather than a traditional system design with multiple, duplicated databases or a central, replicated database, FactoryTalk Directory references tags and other system elements from multiple data sources—and makes the information available to clients through a lookup service.

Tags are stored in their original environments, such as logic controllers. Graphic displays are stored in the HMI servers where they are created. This information is available, without duplication, to any FactoryTalk product participating in an application.

For example, at workstation 1, a logic programmer programs PLC tags using RSLogix™ and saves the project. At workstation 2, an engineer using FactoryTalk View SE has immediate access to the tags created in the PLC program, without creating an HMI tag database. Tags are available for immediate use anywhere within the application, even before the logic program is downloaded to the controller. As the logic program is edited, most tag information is updated, and new tags are available immediately across the system.

With RSLogix 5000® controllers, tags reside within the hardware itself. With Allen-Bradley® PLC-5® and SLC™ 500 devices, and with third-party controllers, tags reside within data servers, such as RSLinx Classic and FactoryTalk® Linx™. Tags are not held within a common database, nor are they duplicated in multiple databases. Instead, the FactoryTalk Directory references tags from their source.
locations and passes the information on to the software products that need it, such as FactoryTalk View SE and FactoryTalk Transaction Manager.

A single computer can host two types of directories

The FactoryTalk Services Platform installs and configures two completely separate and independent directories: a local directory and a network directory. Each directory can hold multiple applications.

- In a local directory, all project information and security settings are located on a single computer, and the FactoryTalk system cannot be shared across a network or from the network directory on the same computer. Products such as FactoryTalk View SE (Local) and FactoryTalk View Machine Edition use the local directory.

- A network directory organizes project information and security settings from multiple FactoryTalk products across multiple computers on a network. Products such as FactoryTalk View SE and FactoryTalk Transaction Manager use the network directory.

Determining the appropriate directory depends upon the software products and whether the environment is stand-alone or networked.

See also

Example: Two directories on one computer on page 24

Configure a network directory client computer on page 40

FactoryTalk systems on page 15

Accounts and groups

Create accounts for users, computers, and groups of users and computers to define who can perform actions, and from where.

Security settings for accounts are stored in FactoryTalk Directory, and are separate for FactoryTalk network and local directories. As much as possible, secure resources by defining security permissions for the group accounts. Add user and computer accounts to the groups, and all individual accounts in the groups have the security settings of those groups.

User accounts and user group accounts

Accounts for users and user groups can link to accounts in a Windows® domain or workgroup, or be separate from those in Windows.

If the FactoryTalk system security needs are the same as the Windows security needs, using Windows-linked user or group accounts provides a convenient way to add large numbers of existing Windows user or group accounts to the FactoryTalk
system. Account properties — for example, whether users can change passwords — are inherited directly from the Windows accounts, and update automatically when changed in Windows. Separate account administration is not required.

FactoryTalk user accounts or user group accounts provide secure access to the FactoryTalk system independently of the level of access users have in Windows. If the security needs of the FactoryTalk system are different from those of the Windows network, FactoryTalk Directory user accounts provide the benefits and convenience of centralized administration, without needing a Windows domain. FactoryTalk user group accounts also retain their security settings if the FactoryTalk Directory moves to a new domain.

**Computer and computer group accounts**

Sometimes restricting access to resources based on a user’s physical location is necessary. Some critical operations require line-of-sight security, to ensure that computers are located within view of the equipment they are controlling. For example, a system designer might determine that a piece of equipment is operated from one specific operator workstation or group of workstations physically located within a clear view of the machine.

Computer accounts and computer group accounts are not linked to Windows. Accounts for computers that do not yet exist in Windows can be created in a local FactoryTalk Directory. However, the name of a computer account must match the Windows computer name for the security settings associated with the computer to take effect. Because a FactoryTalk local directory runs on a single computer, add computer accounts only to a FactoryTalk local directory.

**Account status**

By default, user accounts and group accounts have active status, which means that the account can be used to access resources. Other possible account statuses are:

- Disabled, prevents the user from accessing the account temporarily.
- Locked, the wrong password was entered more than a certain number of times.
- Deleted, prevents the user from accessing the account permanently.
- Unknown, information about the account could not be obtained from the network.

**See also**

[Account types](#) on page 20

[Manage users](#) on page 43
Account types

FactoryTalk supports these account types:

- FactoryTalk user accounts that are separate from Windows accounts.
- Windows-linked user accounts that are linked to existing user accounts in a Windows domain or workgroup.
- Windows-linked user groups that determine access for all of the Windows accounts in the group. To specify different permissions for some users in the Windows-linked group, add Windows-linked user accounts for those users.

Both Windows-linked accounts and FactoryTalk accounts can be in a FactoryTalk Directory. Example: A FactoryTalk administrator account that is unique to the FactoryTalk Directory and FactoryTalk user accounts that are linked to Windows user accounts.

When to use FactoryTalk user accounts

- For the convenience and benefits of centralized security administration across the entire distributed system, without reliance on a Windows domain. This is often necessary when your organization's IT department controls administration of Windows users, and does not allow you to modify accounts in Windows.
- For central user authentication when using Windows workgroups in a FactoryTalk network directory. For all FactoryTalk products, FactoryTalk Directory is the central authority for user authentication, allowing you administer user accounts centrally, rather than locally on each computer. You can use Windows-linked accounts with Windows workgroups in a local directory.
- When the security needs of the Windows network are different from the security needs of the control network. For example:
  - When all operators share the same Windows account to gain access to the computer.
  - When the computer is always logged on under a particular Windows account, FactoryTalk accounts allow different operators to gain different levels of access to the control system, independently of their access to Windows.
  - When the computer automatically logs on to the Windows network after restarting (for example, after a power failure), so that it can run
control programs automatically. FactoryTalk accounts allow operators to log on and off the control system independently of Windows.

When to use Windows-linked user accounts

- When the security needs of the Windows network are the same as the security needs of the control system. For example:
  - When the control system is located in its own domain, perhaps separately from business systems, and user accounts and passwords can be shared between Windows and FactoryTalk software programs.
  - When operators can log on and off computers with their own Windows accounts, and the software programs they use start automatically.

When to use Windows-linked user group accounts

If you expect the need to move Windows accounts from one domain to another, use Windows-linked user group accounts. Windows-linked user group accounts, and the user accounts they contain, can be moved from one domain to another while keeping security permissions for the group accounts intact. Individual Windows-linked user accounts must be deleted and then re-created in the new domain, causing all security permissions for the user accounts to be lost.

Always have at least one Windows-linked user account that is a member of the FactoryTalk Administrators group. This prevents an inadvertent lock out of the FactoryTalk system. If the Windows-linked administrator account is locked out, for example because the user exceeds the maximum number of logon tries, the Windows domain administrator can reset the account. Alternatively, the user can wait until Windows automatically resets and frees the locked-out account. When this happens depends on the account lockout duration policy in Windows. For details, see Windows Help.

Rules for using FactoryTalk accounts and Windows-linked accounts

- FactoryTalk user accounts cannot be members of Windows-linked user groups.
- A Windows-linked user group cannot be a member of a FactoryTalk user group. However, individual Windows-linked user accounts can be members of FactoryTalk user groups. This allows you to use FactoryTalk user groups when setting permissions.
- A FactoryTalk user account or Windows-linked user account can be a member of more than one FactoryTalk user group.
See also

- How security authenticates user accounts on page 32
- Accounts and groups on page 18
- Manage users on page 43
- Manage user groups on page 51
- Secure resources on page 137

Applications and areas

In a FactoryTalk Directory, elements such as data servers, alarm and event servers, device servers, HMI servers, and project information are organized into applications. A FactoryTalk Directory holds any number of applications, stores information about each application, and makes that information available to FactoryTalk products and services.

A FactoryTalk network directory can manage any number of separate network applications. Likewise, a FactoryTalk local directory can manager any number of separate local applications. When developing a FactoryTalk system, log on to either a network directory or a local directory, create an application, add device servers, data servers, and optional alarm and event servers.

Areas organize and subdivide applications in a network directory into logical or physical divisions. For example, separate areas might correspond with separate manufacturing lines in one facility, separate plants in different geographical locations, or different manufacturing processes.

HMI Servers are added and configured using FactoryTalk View Studio, but their status can be viewed in FactoryTalk Administration Console. The root of an application in a network directory can contain only one HMI server. Create a separate area for each HMI server added to an application. Areas cannot be created within a local application.

See also

- FactoryTalk Directory types on page 17
- FactoryTalk systems on page 15

Security in a FactoryTalk system

FactoryTalk Security is intended to improve the security of an automation system by limiting access to users with a legitimate need. Security in FactoryTalk is accomplished through authentication and authorization. Security services are managed separately in the FactoryTalk local directory and the FactoryTalk network directory.
Authentication

FactoryTalk authenticates the user’s identities to access a FactoryTalk system against a defined set of user accounts held in the FactoryTalk Directory. FactoryTalk verifies a user’s identity and that a request for service actually originates with that user.

Authorization

FactoryTalk authorizes user requests to access resources in a FactoryTalk system against a set of defined access permissions held in the FactoryTalk Directory.

Securing resources

FactoryTalk Security addresses both authentication and authorization concerns by helping define the answer to this question:

“Who can carry out what actions upon which secured resources from which locations?”

- **Who**—refers to users and groups of users. Different users need different access rights.
- **Actions**—refers to the operations to perform on a resource, such as read, write, update, download, create, delete, edit, insert, and so on.
- **Secured resources**—refers to the objects for which actions are secured. Each FactoryTalk product defines its own set of resources. For example, some products might allow configuring security on resources in an area, while others might allow configuring security for logic controllers and other devices.
- **Locations**—refers to the location of the authorized computers. For example, allowing values to be downloaded to a controller only from workstations that are located within a clear line of sight to the plant floor machinery to adhere to safety requirements.

The principle of inheritance determines how access permissions are set. For example, when assigning security to an area in an application, all of the items in the area inherit the security settings of the area. Override this behavior by setting up security for one or more of the individual objects inside the area as well.

When a user attempts to log on to a FactoryTalk system, FactoryTalk Security verifies the user’s identity. If the user is authenticated, FactoryTalk Security continues to check the user’s level of access to the system, to authorize the actions the user performs on secured resources.

System-wide policies dictate some security settings. For example, setting up a policy that requires users to change their passwords once every 90 days.
Different software products have different requirements for the FactoryTalk Directory. Both directories are installed and configured as part of installing the FactoryTalk Services Platform. The directory needed depends upon which software products are used and whether working in a stand-alone or a networked environment.

For example, if using FactoryTalk View SE or FactoryTalk Transaction Manager, use the network directory to create and manage network applications. If using FactoryTalk View Machine Edition, use the local directory to create and manage local applications. Other products, such as RSLogix 5, RSLogix 500, and FactoryTalk Linx, allow using either directory.

Even though a local directory and a network directory reside on the same computer, all of their project information and security settings remain completely separate and cannot be shared, including:

- User accounts, passwords, security permissions
- System-wide policy settings, including security and audit policies
- Project information, such as applications, areas, and their contents

The graphic below shows three computers. Each computer has both a local directory and a network directory configured. Each directory holds objects, which represent project information, such as applications, references to data servers, and security settings, including user accounts. In each local directory, access to these project objects is only by software products installed on that same local computer. The network directory, however, can share references to its objects across a network.
For example, suppose each colored icon above represents the project information and security settings that are part of a FactoryTalk system. The local directories on each computer hold completely separate sets of information (represented by the green, blue, and yellow icons). In the network directory case, all client computers that point to the same network directory server computer share the same set of information across the network (represented by the orange icons).

Run FactoryTalk Administration Console on Computer 3, log on to the network directory, and create a user account named "Terry" with the password "OpenSesame." The change is actually made in the network directory server, held on Computer 1, and immediately reflected on each network directory client computer. "Terry" can now log on to the network directory from any of the three computers.

Now create a user account named "Terry" with the password "OpenSesame" in each Local Directory on every computer. Even though the user name and password are the same, each user account is a separate object in each local directory.

When changing the password in the local directory on Computer 1, the change does not affect the user account held in the network directory server on the same computer, nor does it affect the user accounts held in the local directories on computers 2 and 3.

See also

Applications and areas on page 22
FactoryTalk Directory types on page 17
FactoryTalk systems on page 15
Install FactoryTalk Services Platform

FactoryTalk Services Platform and FactoryTalk Security software are not installed separately — FactoryTalk Security is an integrated part of the FactoryTalk Services Platform.

FactoryTalk Services Platform is installed from either:

- A FactoryTalk product installation disc, such as FactoryTalk View (FactoryTalk Services Platform software is included on the installation disc of every product that requires it); or,

- The Rockwell Automation Product Compatibility and Download Center (PCDC) website. On the Compatibility & Downloads page, click **Find Downloads**. On the **Find Downloads** page, in the **Search** box, type "FTSP". **FTSP-Download FT Services Platform** appears in your download list.

To install FactoryTalk Services Platform, you must log on to Windows with a user account that is a member of the Windows Administrators group on the local computer.

Install FactoryTalk Services Platform on every computer where you plan to develop or run Network or Local applications. During installation several components are installed on the computer, if any prerequisite software components are not present on a computer, the installation program will attempt to install the software.

Platform components and services currently include:

- FactoryTalk Directory
- FactoryTalk Security
- FactoryTalk Diagnostics
- FactoryTalk Live Data
- FactoryTalk Administration Console – a stand-alone tool for configuring, managing, and securing applications.

All of these components and services install together as a platform, integrated into the software install process for each FactoryTalk-enabled product.
FactoryTalk Web Services is not installed by default, and must be installed separately.

**Tip:**
FactoryTalk Services Platform establishes a Network Directory server when installed, other computers on which FactoryTalk Services Platform is installed will be client computers. Determine which computer in the system is going to be used as the directory server and note this computer name. After FactoryTalk Services Platform is installed on the client computers, run the **FactoryTalk Directory Server Location Utility** and identify the computer name of the Network Directory server.

**Network security**

For the latest network security considerations when using Rockwell Automation products, visit the Rockwell Automation Knowledgebase.

For information about:

- File extensions created by Rockwell Automation software, firewall rules, and service dependences, see Rockwell Automation Knowledgebase Answer ID 609492.
- TCP/UDP ports used by Rockwell Automation products, see Rockwell Automation Knowledgebase Answer ID 898270.

**See also**

- [Product Compatibility and Download Center](#)
- **FactoryTalk Web Services** on page 211
- **Upgrade FactoryTalk Services Platform** on page 209
- Knowledgebase Answer ID 609492
- Knowledgebase Answer ID 898270
Getting started with FactoryTalk Security

This chapter introduces you to key parts of FactoryTalk Security, including:

- FactoryTalk Administration Console
- Action groups
- Policies
- Computers and groups
- Networks and devices
- Users and groups
- Single sign-on
- Tightening security

FactoryTalk Security

FactoryTalk Security improves the security of your automation system by limiting access to those with a legitimate need. FactoryTalk Security authenticates the identities of users, and authorizes user requests to access a FactoryTalk system against a set of defined user accounts and access permissions held in the FactoryTalk local directory or FactoryTalk local directory.

Integrated security services for your FactoryTalk system

FactoryTalk Security provides security services integrated into both the FactoryTalk local directory and the FactoryTalk local directory. In a local directory, all project elements are located on a single computer, and the FactoryTalk Administration Console system cannot be shared across a network. A network directory organizes information about project elements from multiple FactoryTalk products across multiple computers on a network. Even though a local directory and a network directory are always present on the same computer, all of their project elements remain completely separate and cannot be shared.

Authentication and authorization

Chapter 3  Getting started with FactoryTalk Security

- **Authenticate**—verify a user’s identity and verify that a request for service actually originates with that user.
- **Authorize**—verify a user’s request to access a software resource against defined access permissions.

FactoryTalk Security addresses both authentication and authorization concerns and defines the answer to the question:

"Who can carry out what actions upon which secured resources from where?"

- **Who**—refers to users and groups of users. Different users need different access rights.
- **What actions**—refers to the actions that can be performed on a resource, such as read, write, update, download, create, delete, edit, insert, and so on.
- **Which secured resources**—refers to the objects for which actions are secured. Each FactoryTalk product defines its own set of resources. For example, some products might allow security configuration on resources in an area, while others might allow security configuration for logic controllers and other devices.
- **Where**—allows security to differ based on machine location. It is sometimes important to restrict certain actions to specific workstations. For example, for safety reasons, it might be necessary to allow downloading values to a controller only from workstations that are located within a clear line of sight to the plant floor machinery that are affected by the downloads.

The principle of inheritance determines how access permissions are set. For example, assigning security to an area in an application, all of the items in the area inherit the security settings of the area. Override this behavior by setting up security for one or more of the individual objects inside the area.

At runtime, when a user attempts to log on to a FactoryTalk system, FactoryTalk Security verifies the user’s identity. If the user is authenticated, FactoryTalk Security continues to check the user’s level of access to the system, in order to authorize the actions the user performs on secured resources.

System-wide policies dictate some security settings. For example, you can set up a policy that requires users to change their passwords once every 90 days.

**See also**

- How security authenticates user accounts on page 32
- Things you can secure on page 32
- Best practices on page 34
Security on a local directory

By default, security is open in the FactoryTalk local directory. All users who have successfully logged on to Windows have full access to the local directory.

Because the network directory and local directory are separate, secure them separately. Some Rockwell Automation software products require the FactoryTalk network directory, others require the FactoryTalk local directory, and some require both directories to be configured.

Manage on a local directory:

- User accounts, passwords, and security permissions
- System-wide policy settings, including security and audit policies
- Product information, such as applications, areas, and their contents

To tighten security on a stand-alone system, perform these tasks:

- Delete the Windows-linked group named Authenticated Users. This prevents all users who have successfully logged on to Windows from automatically having access to the FactoryTalk local directory.
- Remove security settings that allow all users to have full access to the FactoryTalk local directory.
- Modify security policies to secure the system.

See also

Delete a user group on page 56

Secure resources on page 137

Security on a network directory

By default, security is open in the FactoryTalk network directory. This means that all users who are logged on to Windows with a user account that is a member of the local Windows Administrators group on any computer connected to the network directory have full access to the directory.

Because the network directory and local directory are separate, secure them separately. Some Rockwell Automation software products require the FactoryTalk network directory, others require the FactoryTalk local directory, and some require configuring both directories.

Key steps to tighten security in a distributed system on a network include:
• Create one or more FactoryTalk user accounts or Windows-linked user accounts, then add those accounts to the FactoryTalk Administrators group. This retains administrative access to the FactoryTalk Directory after removing the Windows Administrators group in the next step.

• Remove the Windows-linked group named Authenticated Users. This prevents all user accounts on any local computer connected to the network directory from automatically having access to the network directory.

• Remove the security settings that allow all users full access to the FactoryTalk network directory.

• Modify security policies to secure the system.

See also

Delete a user group on page 56

Secure resources on page 137

How security authenticates user accounts

When a user attempts an action that is secured, security authenticates user names and passwords in this order:

1. Against the list of FactoryTalk user accounts. If a match is found, the user is allowed to proceed.

2. Against the list of Windows-linked user accounts. If a match is found, the user is allowed to proceed.

3. Against the list of accounts in a Windows-linked user group. If a match is found for the user name and password in a Windows-linked user group, the user is allowed to proceed, even if no Windows-linked user account is present for that user.

To prevent some users in a Windows-linked group from having access to the FactoryTalk system, create Windows-linked accounts for those users, and then set permissions to deny access to those user accounts.

See also

Permissions on page 138

Account types on page 20

FactoryTalk Security on page 29

Things you can secure

Use Allow or Deny permissions to secure access to resources in the system. Resources include:

• The FactoryTalk network directory or local directory
• The System folder and its contents
• Applications
• Areas
• Servers
• Control networks
• Hardware devices

**Security for resources is always tied to users, actions, and computers**

Security for resources is always tied to users or groups of users, the actions they are performing, for example, read or write, and the computers, or groups of computers where they are working.

This helps ensure that only authorized personnel can perform actions on the equipment and resources in the system from appropriate locations, for example, computers located within line of sight of equipment.

In a local FactoryTalk directory, a user can perform actions only from the local computer.

**Set permissions to restrict actions to users, user groups, computers, or computer groups**

For each resource, for example, an application, or an area within it, restrict actions such as writing values, to particular users or groups of users. In a network directory, actions can be restricted to particular computers, or groups of computers.

Group actions together and assign security permissions to all actions in the group. For example, assign permissions to an area so that only operators working on computers located within the line of sight of heavy machinery can write values to the programmable controllers in that area.

Suppose that:

• The area is named "Punch Presses"
• The operators belong to a user group named "Operators"
• The computers within line of sight of the machinery belong to a computer group named "Heavy Machinery"

First, clear **Allow** for All Users and All Computers in the Punch Presses area. Next, select **Allow** for the user group Operators and the computer group Heavy Machinery.
When setting permissions, **Deny** permissions are implied unless **Allow** permissions are specified explicitly. Clearing **Allow** ensures that all users are denied write access, except those explicitly allowed access.

**Using the Security item**

Right-click an item in the **Explorer** and select **Security**, to set up which users or user groups on which computers may access the selected resource.

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**Important:** Right-clicking the **System** folder, **Users and Computers** folder, **Users** folder, or the **Computers** folder, and specifying security permissions sets security on that actual folder. It does not limit users’ access to the system. To limit access to resources in the FactoryTalk system, right-click the resource to secure, select **Security**, and specify security permissions for the user and computer accounts allowed to access the resource.

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### Security settings are separate in the network and local directory

Security settings are completely separate in the network directory and local directory. Changes made to the security settings in the network directory do not affect the local directory and vice versa. If using both a network directory and a local directory, set up security in each directory separately.

### Security settings apply to all FactoryTalk products

Security settings configured for resources apply to all FactoryTalk products in the system. For example, when denying a user **Read** access to an area from a particular computer, that user cannot see that area in any FactoryTalk product while working from that computer.

**See also**

- [Permissions on page 138](#)
- [Best practices on page 34](#)
- [Actions on page 142](#)
- [FactoryTalk Security on page 29](#)

**Best practices**

Use these tips when setting up the FactoryTalk system to achieve efficient management of user authentication and authorization.

**Administrator accounts**

- Always have more than one user account that is a member of the FactoryTalk Administrators group. If the password to one administrator account is lost, use a second administrator account to reset the password to the first one. A lost password to a user account is not recoverable. A second
administrator account prevents being locked out of the FactoryTalk system if the first administrator password is lost.

- Always have at least one Windows-linked user account that is a member of the FactoryTalk Administrators group. If the Windows-linked administrator account is locked out, for example because the user exceeds the maximum number of logon tries, the Windows domain administrator can reset the account. Alternatively, the user can wait until Windows automatically resets and frees the locked-out account. The wait time depends on the Account lockout duration policy in Windows.

Windows-linked accounts

If Windows accounts might move from one domain to another, avoid using individual, Windows-linked user accounts. Use Windows-linked user group accounts instead. Windows-linked user group accounts can move from one domain to another, while keeping security permissions for the group accounts intact. Windows-linked user accounts must be deleted and then recreated in the new domain, causing the loss of all security permissions for the user accounts. If this occurs all permissions for any individual Windows-linked user accounts must be recreated.

Permissions

- Assign permissions to groups rather than to users.
- Assign permissions to user accounts only by exception. Maintaining user accounts directly is inefficient.
- Wherever possible, remove Allow permissions instead of assigning explicit Deny permissions. The order of precedence of explicit permissions over inherited permissions makes administration simpler, and Deny permissions take precedence over Allow permissions.
- Use Deny permissions to:
  - Exclude a subset of a group that has Allow permissions
  - Exclude one special permission when full control to a user or group is already granted
- Assign permissions at the highest level possible. This provides the greatest breadth of effect with the least effort. Establish rights that are adequate for the majority of users. For example, assign security to areas rather than to objects within areas.
- Administrators should use an account with restrictive permissions to perform routine, non-administrative tasks. Use an account with broader permissions only when performing specific administrative tasks.
Audit trails and regulatory compliance

To achieve compliance in regulated industries, the plant might be required to keep records that answer these questions:

- Who performed a particular operation on a specific resource?
- Where did the operation occur?
- When did the operation occur?
- Who approved the operation?

To answer these questions:

- Ensure that all users are uniquely identifiable in the system
- Keep a record of deleted users
- Log information about user and system activity to diagnostic log files
- Set up audit trails of successful or unsuccessful attempts at modifying system values

Ensure that all users are uniquely identifiable in the system

When choosing user names, ensure that they are unique.

- A user should have the same user name on every computer. This is mostly for convenience, both for the user and for the administrator.
- A particular user name should always refer to the same person. A system in which the same user name refers to more than one person is never really secure.

Develop a scheme for identifying users uniquely. Keep in mind that user names are visible, and should not contain any private information, for example, social security numbers. User names are also typed frequently, and should be relatively easy to remember.

If the system is required to comply with governmental regulations, multiple names for the same user may be necessary. This may occur if a user leaves the company and their user account is deleted, then the user is rehired.
Keep a record of deleted users

To ensure that all user accounts remain unique, keep track of deleted accounts. This might also be an audit requirement, such as tracking a user’s actions throughout the system, even after the user’s account was deleted.

To ensure that only unique user accounts are created, enable the security policy **Keep record of deleted accounts**. To avoid a trial-and-error process of creating unique user accounts, make deleted accounts visible in lists of users by enabling the security policy **Show deleted accounts in user list**.

Log information about user and system activity to diagnostic log files

Logging information consists of two steps:

1. Choose the information to log and then send the information to FactoryTalk Diagnostics. For example, enable audit logging to record what changes were made to security policies or other objects, who made the changes, and when they were made. If the **Audit configuration and control system changes** policy is not enabled, FactoryTalk Diagnostics does not receive any audit messages, and cannot store the audit messages in log files.

2. Configure FactoryTalk Diagnostics to store the information in log files. For example, configure FactoryTalk Diagnostics to store audit information for Operators in local log files. If this step is not completed, FactoryTalk Diagnostics receives the chosen information sent to it, but does not capture this information to store in log files.

To configure FactoryTalk Diagnostics routing and logging options, select **FactoryTalk Diagnostics Setup** from the **Tools** menu on each computer where the FactoryTalk Administration Console or FactoryTalk View is installed. To view diagnostic messages, from the **Tools** menu, select **FactoryTalk Diagnostics > Viewer**.

Set up audit trails of successful or unsuccessful attempts at modifying system values

The most common type of auditing activity is recording failures. This helps trace failures, and isolate and correct their causes.

In some industries it is also common, or mandated by law, that certain types of successful user activity is audited. For example, when making pharmaceutical drugs, any changes or adjustments in recipes must be recorded. Recording this activity allows any problems that might occur to be traced to a specific batch of the product.
Auditing object access success or failure is controlled by system-wide audit policies. Enable these policies if the plant requires them. Audit information is sent to FactoryTalk Diagnostics. Use the FactoryTalk Diagnostics Viewer to monitor security-related events.

**See also**

[Monitor security-related events on page 92](#)

[Audit policies on page 89](#)

**Configure a computer to be the FactoryTalk Directory network server**

FactoryTalk Services Platform configures both a network directory and a local directory on every computer where it is installed.

Use a network directory to organize project information and security settings from multiple FactoryTalk products across multiple computers on a network. After installing and activating FactoryTalk software, specify one of the computers on the network as the network directory server. All computers on the network to share FactoryTalk network directory services and resources.

Products such as FactoryTalk View SE and FactoryTalk Transaction Manager use the network directory.

**Example: Network directory**

Computer 1 serves as the network directory server.
Client computers (Computer 2 and Computer 3) are configured to point to Computer 1 as the network directory server computer.

See also

Configure a computer to be the network directory server on page 39

Configure a network directory client computer on page 40

Check network directory server connection status on page 40

FactoryTalk Directory Server Location Utility on page 41

After installing and activating FactoryTalk software, specify one computer on the network as the network directory server. All computers on the network can share FactoryTalk network directory services and resources.

After configuring the network directory server, configure the client computers to reference the network directory.

To configure a computer to be the network directory server

1. On the computer to use as the Network Directory Server, go to Rockwell Software > FactoryTalk Tools and open Specify FactoryTalk Directory Location.

2. At the prompt, log on to the network directory with a Windows Administrator account.


4. In FactoryTalk Directory Server Configuration, select This computer to use the network directory server installed on this computer, and select OK.

See also

Check network directory server connection status on page 40
Configure a network directory client computer

After specifying one of the computers on the network as the network directory server, use the Specify FactoryTalk Directory Location utility to point each computer in the network to the FactoryTalk Directory network directory server.

To configure a network directory client computer

1. On each participating network directory client computer, go to Rockwell Software > Specify FactoryTalk Directory Location.
2. At the prompt, log on to the network directory with a Windows Administrator account.
4. In FactoryTalk Directory Server Configuration, select Remote computer, then specify the name of the computer to use as the network directory server, and select OK.
5. When prompted, log on to the network directory.

If single sign-on is enabled on the computer when the location of the network directory server changes, the single sign-on session terminates. Log on to the new network directory server. The user name and password entered become the new single sign-on credentials for all participating FactoryTalk products on the computer.

See also

Configure a computer to be the network directory server on page 39
Check network directory server connection status on page 40
FactoryTalk Directory Server Location Utility on page 41

Check network directory server connection status

When a connection to the FactoryTalk network directory server is lost, the system sends an error message to FactoryTalk Diagnostics. Likewise, when the connection is restored, the system sends an information message to FactoryTalk Diagnostics. Run the FactoryTalk Diagnostics Viewer to check FactoryTalk Diagnostics for connection and error messages.

The network directory connection status is available from the FactoryTalk Directory Server Location Utility.
When opening a network application and a connection to the network directory server is not available, the information is based on the data held in a local cache. While disconnected, FactoryTalk Administration Console operates in read-only mode and does not allow most commands and operations.

To check network directory server connection status

1. In FactoryTalk Administration Console select Tools > FactoryTalk Directory Server Options.

2. If a User Account Control prompt appears, select Yes.

3. In the FactoryTalk Directory Server Location Utility, next to Computer hosting directory server, the current status of the active server is displayed. Either:
   - (connected) — All FactoryTalk products and components participating in a FactoryTalk system, located on the current computer, are connected to and communicating with the network directory server computer.
   - (read-only) — The FactoryTalk system on the current computer is disconnected from the network directory server and is retrieving information from a local cache.
   - (unknown) — The connection status is temporarily unknown because the system is starting up, waiting to determine which server is active, or is unable to determine the current state.

See also

Configure a computer to be the FactoryTalk Directory network server on page 38

FactoryTalk Directory Server Location Utility on page 41

How do I open the FactoryTalk Directory Server Location Utility?

Perform one of the following actions:

- From the Start menu, select All Programs > Rockwell Software > FactoryTalk Tools > Specify FactoryTalk Directory Location.
- From the FactoryTalk Administration Console, select Tools > FactoryTalk Directory Server Options.

Use the FactoryTalk Directory Server Location Utility to:

- Specify the computer that is hosting the network directory server
• Point each computer on the network to the network directory server computer

See also

Configure a computer to be the network directory server on page 39

Configure a network directory client computer on page 40

FactoryTalk Directory types on page 17

Check network directory server connection status on page 40
Manage users

Use FactoryTalk Administration Console to add and delete FactoryTalk Directory and Windows-linked user accounts. User accounts exist only in the FactoryTalk Directory where the account was created.

Management of FactoryTalk user accounts includes:

- Adding group memberships to the user account
- Editing the user’s name and description
- Associating an email address with the user’s account
- Setting user password options
- Changing the user account password
- Enabling, disabling, or unlocking the user account
- Resetting the account password

Use Windows administrative tools to edit Windows-linked user accounts.

**Important:** Managing users requires explicit permissions. To verify permissions, in FactoryTalk Administration Console Explorer, expand System, then right-click Users and Groups and select Security. Confirm the permissions listed in the prerequisites for the task are present with the logged in user account.

See also

- Add a FactoryTalk user account on page 43
- Add a Windows-linked user account on page 45
- Add group memberships to a user account on page 46
- Manage user groups on page 51

**Add a FactoryTalk user account**

To create a separate user account from a user’s Windows account, add a FactoryTalk Directory account. Specify the account’s identity, set up how the account operates, and specify the groups to which the account belongs.
Prerequisites

Adding a FactoryTalk user account requires these permissions:

- Common > Create Children
- Common > List Children
- Common > Read

To add a user account

1. In FactoryTalk Administration Console Explorer, expand System > Users.
2. Right-click the Users folder, point to New, and select User.
3. In New FactoryTalk User, type a short name for the user in User Name, and the user’s full name in Full name.
4. (optional) In Description, record user information, such as the user’s position or phone number.
5. (optional) In E-mail, add a single email address. Some FactoryTalk products may send messages to this email address.
6. (optional) Select one or more of these settings for password access:
   - User must change password at next logon
   - User cannot change password
   - Password never expires
8. In Confirm, type the same password entered above.
9. Select OK to add the user to the FactoryTalk Directory.

See also

- Add a Windows-linked user account on page 45
- Delete a user account on page 48
- Password Policy Settings on page 107
- Account types on page 20
Add a Windows-linked user account

Add a Windows-linked user account when the security needs of the Windows network are the same as the security needs of the FactoryTalk system. When accessing FactoryTalk resources using a Windows-linked account, the FactoryTalk Directory relies on Windows to determine whether the user’s name and password are valid, and whether the account is enabled or locked out. Adding Windows-linked user accounts to FactoryTalk Security user groups allows the FactoryTalk Directory to determine a Windows-linked user’s level of access to the FactoryTalk system independently of the user’s level of access to a Windows domain.

Add user accounts to the FactoryTalk network directory or local directory from the list of users or groups in a Windows domain or workgroup. If the computer is disconnected from the Windows domain, reconnect to the domain before adding Windows-linked user accounts. Any users who previously logged on to the Windows domain from that computer can log on to FactoryTalk using their Windows-linked user account while the computer is disconnected from the Windows domain.

Prerequisites

Adding a Windows-linked user account requires these permissions:

- **Common > Create Children**
- **Common > List Children**
- **Common > Read**

To add a Windows-linked user account

1. In FactoryTalk Administration Console **Explorer**, expand **System > Users**.
2. Right-click the **Users** folder, point to **New**, and select **Windows-Linked User**.
3. In **New Windows-Linked User**, select **Add**.
4. In **Select Users**, select the Windows user accounts to link to the FactoryTalk system.
   - If known, type the names of the user accounts to add in the text box. For domain accounts, use the format **DOMAIN\username**, for workgroup accounts use the format **COMPUTERNAME\username**.
To validate the user names, select **Check Names**. Correct any errors, and select **OK**.

- To search for user names, or to select multiple users, select **Advanced**. In **Select Users**, select **Locations**, select the domain or workgroup from which to select users, and select **OK**.

  Alternatively, use the **Common Queries** settings to search by name. Select **Find Now**. In the list of users, select the user accounts to add, and select **OK**.

5. When finished selecting Windows user accounts in **Select Users**, select **OK**.

6. In **New Windows-Linked User**, review the list of users.

   - To remove any users added unintentionally, select the users, and select **Remove**.
   - To add more users, repeat steps 3, 4, and 5.

7. Select **OK**.

See also

- [Add a FactoryTalk user account](#) on page 43
- [Delete a user account](#) on page 48
- [Add group memberships to a user account](#) on page 46
- [Remove group memberships from a user account](#) on page 47
- [Manage users](#) on page 43

To quickly change the permissions for a user account to those of an existing FactoryTalk user group, assign the user account to the user group. New group memberships take effect only when the user logs off FactoryTalk and then logs on again.

**Prerequisites**

Changing the group memberships of a user account requires these permissions:

- Common > List Children
- Common > Read
- Common > Write
To add group memberships to a user account

1. In FactoryTalk Administration Console Explorer, expand System > Users, right-click the user account, and select Properties.

2. On the Group Membership tab, select Add.

3. In Select User Group, select the groups to which the user account belongs, and then select OK.

4. In User Properties, select OK.

See also

- Remove group memberships from a user account on page 47
- Manage user groups on page 51
- Permissions on page 138
- FactoryTalk Security on page 29
- Account types on page 20

Remove group memberships from a user account

When a user account belongs to a user group, the user account automatically inherits all permissions assigned to the group, unless permissions are specifically denied for the user account.

Delete a group from Group Membership User Properties to remove the link between the permissions of the user account and the permissions assigned to that user group.

Changes to group memberships take effect only when the user logs off FactoryTalk and then logs on again.

To remove group memberships from a user account

1. In FactoryTalk Administration Console Explorer, expand System > Users, right-click the user account containing the group memberships to change, and select Properties.

2. Select the Group Membership tab.

3. In the list of groups, select the groups and select Remove.

4. In User Properties, select OK.
Delete a user account

Delete a user account to permanently remove the account from the FactoryTalk Directory. To prevent inadvertently locking an account out of the FactoryTalk Directory, do not delete the last user account that is a member of the Administrators group.

To delete a user account from both a network directory and a local directory, delete the account from one directory, log off that directory, log on to the second directory, and then delete the account in the second directory.

To temporarily prevent a user from logging on to FactoryTalk, disable the FactoryTalk user account.

Prerequisites

Deleting a user account that is a member of a user group requires these permissions:

- Common > Delete
- Common > List Children
- Common > Read
- Common > Write

Deleting a user account that is not a member of a user group requires these permissions:

- Common > Delete
- Common > List Children
- Common > Read

To delete a user account

- In FactoryTalk Administration Console Explorer, expand System > Users, right-click the user account, and then select Delete.
Tip: You can only create an account using the name of a deleted account if the security policy Keep record of deleted accounts is disabled. You must still recreate the security settings of the user accounts.

See also

Add a FactoryTalk user account on page 43
Manage user groups

Use FactoryTalk Administration Console to add and delete FactoryTalk and Windows-linked user group accounts. Add both FactoryTalk and Windows-linked user accounts to FactoryTalk user group accounts. Windows-linked user groups, and the user accounts they contain, can move from one domain to another while keeping security permissions for the group accounts intact.

Key points about user groups:

- User group accounts exist only in the FactoryTalk Directory in which created.
- FactoryTalk user accounts cannot be members of Windows-linked user groups.
- A Windows-linked user group cannot be a member of a FactoryTalk user group. However, individual Windows-linked user accounts can be members of FactoryTalk user groups. This allows use of FactoryTalk user groups when setting permissions.
- A FactoryTalk user account or Windows-linked user account can be a member of more than one FactoryTalk user group.

**Important:** Managing user groups requires explicit permissions. To verify permissions, in FactoryTalk Administration Console Explorer, expand System, then right-click Users and Groups and select Security. Confirm the permissions listed in the prerequisites for the task are present with the logged in user account.

See also

- Add a FactoryTalk user group on page 51
- Add a Windows-linked user group on page 53
- Add accounts to a FactoryTalk user group on page 57
- Accounts and groups on page 18
- Account types on page 20

Add a FactoryTalk user group
Create a new FactoryTalk user group to administer security permissions for specified users as a group. Change the memberships of a user account to quickly change the resources a user can access.

A FactoryTalk user group can contain:

- FactoryTalk user accounts
- Windows-linked user accounts
- FactoryTalk user group accounts

Use **New User Group** to add a FactoryTalk user group account to the FactoryTalk Directory that is separate from a Windows user group account. Then specify the group account’s identity (for example, the name of the group) and the user accounts that are members of the group.

**Prerequisites**

Adding a FactoryTalk user group requires these permissions:

- Common > Create Children
- Common > List Children
- Common > Read

**To add a user group account**

1. In FactoryTalk Administration Console **Explorer**, expand **System > User Groups**.
2. Right-click the **User Groups** folder, point to **New**, and select **User Group**.
3. Type a name for the group in the **Name** box.
4. (optional) Enter any notes about the group in the **Description** box.
5. (optional) In the **E-mail** box, type only one email address or group address to associate with this group account.
6. Select **Add** to add user accounts to the group. In **Select User or Group**, select to select the users or groups to add to the new user group account. Under **Filter Users**, choose from the following:
• Show groups only
• Show users only
• Show all
• Create New

7. Select OK to add the selected user or group to the Members List in New User Group.

8. Select OK when finished creating the user group.

See also

Delete a user group on page 56
Manage user groups on page 51

Add a Windows-linked user group

To move Windows accounts from one domain to another, create Windows-linked user group accounts instead of individual Windows-linked user accounts. Windows-linked user group accounts, and the user accounts they contain, can move from one domain to another while keeping security permissions for the group accounts intact.

Add user groups from a Windows domain or workgroup to the FactoryTalk system to allow the user accounts in the group to access the FactoryTalk system. To modify the properties of a Windows-linked user group, (for example the group's name, or which user accounts are group members), modify these properties in Windows.

When adding a Windows-linked user group account, all user accounts in the Windows user group have access to the FactoryTalk system. To prevent some users in a Windows-linked group from accessing the FactoryTalk system, create Windows-linked user accounts for those users, and set permissions to deny access to those user accounts.

Prerequisites

1. Connect the computer to the Windows domain containing the user groups to add to the FactoryTalk Directory.

2. Obtain these permissions in the User Groups folder in FactoryTalk Administration Console Explorer:
Chapter 5  Manage user groups

- Common > Create Children
- Common > List Children
- Common > Read

To add a Windows-linked user group account

1. In FactoryTalk Administration Console Explorer, expand System > User Groups.
2. Right-click the User Groups folder, point to New, and select Windows-Linked User Group.
4. In Select Groups, select the Windows groups, and select OK.
   - If known, type the names of the user group accounts in the text box. For domain accounts, use the format DOMAIN\groupname, for workgroup accounts use the format COMPUTERNAME\groupname. To validate the names, select Check Names. Correct any errors, and select OK.
   - To search for group by name or description, or to select multiple groups, select Advanced.
     a. In Select Groups, select Locations and select the domain or workgroup from which to select groups.
     b. Under Common Queries, complete the information with which to search the directory:
        - Name: Choose whether to search for a name that starts with the specified values or is an exact match to the specified value and then type the search string.
        - Description: Choose whether to search for a description that starts with the specified values or is an exact match to the specified value and then type the search string
        - Disabled accounts: Select to include disabled accounts when searching.
        - Non expiring password: Select to include accounts that have passwords that never expire when searching.
        - Days since last logon: Specify to look for accounts based on how long it has been since the account successfully logged on/
     c. Select Find Now.
d. In the list of groups, select the group accounts to add, and select **OK** to close **Advanced Select Groups**.

e. The groups selected are listed under **Enter the object name to select**. Select **Check Names** to verify the names and then select **OK** to close **Select Groups**.

5. In **New Windows-Linked User Group**, review the list of groups.

   - To remove any groups added unintentionally, select the groups, and select **Remove**.
   - To add more groups, repeat steps 3 and 4.

6. Select **OK**.

   **Tip:** Use a password for all Windows accounts in a Windows-linked group, otherwise intermittent security failures or an inability to log on may occur. To follow good security practice, do not use blank passwords with accounts. To avoid using a password for Windows-linked accounts, on the local computer disable the **Windows local security policy Accounts: Limit local account use of blank passwords to console logon only**.

See also

- **Delete a user account** on page 48
- **Add a Windows-linked user account** on page 45
- **Account types** on page 20
- **Manage user groups** on page 51

**Edit or view user group properties**

Modify the properties of a FactoryTalk user group account that is not linked to a Windows user group account. View the properties of a Windows-linked user group account. The name of a user group cannot change.

Group memberships added to a user group account take effect only when the user logs off FactoryTalk and then logs on again.

**Prerequisites**

Editing or viewing user group properties requires these permissions:

- Common > List Children
- Common > Read
- Common > Write
To edit or view user group properties

1. In FactoryTalk Administration Console Explorer, expand System > User Groups, right-click the user group account, and select Properties.

2. (optional) In the Description box, type a description of the user group. For example, record information about where the group is located, what part of the system is relevant to the group, or contact information for the leader of the group.

3. (optional) In the E-mail box, type only one email address or group address (for example jenkins@yourcompany.com, or maintenance@yourcompany.com), to associate with this account. Ensure that the address you typed is a valid address, and that you typed the address correctly. Some FactoryTalk-enabled products can send messages or notifications to an email address. For details, see the documentation supplied with your FactoryTalk-enabled product.

4. (optional) To add accounts to the group, select Add. In Select User or Group, select the users or user groups to add to the group, and select OK.

5. (optional) To remove user accounts, select the users or user groups to remove from the group, and select Remove.

6. Select OK.

See also

- Add a FactoryTalk user group on page 51
- Add a Windows-linked user group on page 53
- Account types on page 20
- Manage user groups on page 51

Delete a user group

Delete a user group when a particular group account is no longer needed to manage a group of users. Before deleting the user group, view the properties of the user group account.

To help prevent inadvertent lock out of the FactoryTalk Directory, the Administrators group cannot be deleted.

Prerequisites

Deleting a user group account that has no members requires these permissions:

- Common > Delete
• Common > List Children
• Common > Read
Deleting a user group account that has members requires these permissions:
• Common > Delete
• Common > List Children
• Common > Read
• Common > Write

To delete a user group

• In FactoryTalk Administration Console Explorer, expand System > User Groups, right-click the user group account, and then select Delete.

See also
Edit or view user group properties on page 55
Manage user groups on page 51

Add accounts to a FactoryTalk user group

Any time after creating a FactoryTalk user group, add or remove the user accounts that belong to the group. Members of a Windows-linked user group cannot be added or removed. However, individual Windows-linked user accounts can be added to FactoryTalk user groups.

Tip: Alternatively, change the groups to which a user belongs. Use Group Membership User Properties to add or remove user groups from a FactoryTalk or Windows-linked user account.

To add accounts to a FactoryTalk user group

1. In FactoryTalk Administration Console Explorer, expand System > User Groups, right-click the user group account, and select Properties.
2. Select Add.
3. In Select User or Group, select each user or user group to add to the user group account. Use the options under Filters to show only users, only user groups, or all accounts. Select OK when finished.

See also
Remove accounts from a FactoryTalk user group on page 58
Add a FactoryTalk user group on page 51
After creating a FactoryTalk user group, members can be added or removed at any time. However, after a Windows-linked user group is added to the FactoryTalk Directory, its members cannot be deleted or removed.

Tip: Alternatively, change the groups to which a user belongs. Use Group Membership User Properties to add or remove groups from either a FactoryTalk or Windows-linked user account.

To remove accounts from a FactoryTalk user group

1. In FactoryTalk Administration Console Explorer, expand System > User Groups, right-click the user group account, and select Remove.

2. In Select User or Group, select each user or user group to remove from the user group account. Use the options under Filters to show only users, only user groups, or all account.

3. Select OK when finished.

See also

Add accounts to a FactoryTalk user group on page 57
Add a FactoryTalk user group on page 51
Add a Windows-linked user group on page 53
Delete a user group on page 56
Manage user groups on page 51
Chapter 6

Manage computers

Use FactoryTalk Administration Console to manage the computer accounts in a FactoryTalk network directory. The FactoryTalk local directory does not make use of computer accounts because all activity on the directory is restricted to the local computer.

Tasks related to managing computers:

• Add a computer
• Delete a computer
• Add group memberships
• Remove group memberships
• Change the name of a client computer
• Change the name of a server computer
• Set the override directory cache policies

Important: Managing computers requires explicit permissions. To verify permissions, in FactoryTalk Administration Console Explorer, expand System, then right-click Computers and Groups and select Security. Confirm the permissions listed in the prerequisites for the task are present with the logged in user account.

See also

Add a computer on page 59
Edit or view computer properties on page 61

Add a computer

To allow a computer to access the FactoryTalk system, add a computer to a FactoryTalk network directory. After adding the computer account, specify security settings for the computer that allow or deny access to parts of the FactoryTalk system or add the computer to a group account, and then specify security settings for the group.
Important: Even if the security policy Require computer accounts for all client machines is disabled, you must still create computer accounts for any computers hosting servers — for example, Terminal Servers, Rockwell Automation Device Servers (FactoryTalk Linx), OPC data servers, Tag Alarm and Event Servers, or HMI servers.

Prerequisites

Adding computer accounts requires these permissions:

- Common > Create Children
- Common > List Children
- Common > Read

To add a computer account

1. In FactoryTalk Administration Console Explorer, expand System > Computers and Groups, right-click Computers, and then select New Computer.

2. In New Computer, in Computer name, type the name of the computer, or select Browse (...) and then choose a computer name.

3. (optional) In Description, type descriptive information about the computer (Example: Operator workstation for South Building production line 1, for maintenance contact maintenance@yourcompany.com).

4. Select OK.

See also

Delete a computer on page 60

Accounts and groups on page 18

Delete a computer

Delete a computer from the FactoryTalk network directory to remove its access to the FactoryTalk system.

Prerequisites

Deleting a computer account that is not a member of a computer group requires these permissions:

- Common > Delete
- Common > List Children
- Common > Read
Deleting a computer account that is a member of a computer group requires these permissions:

- Common > Delete
- Common > List Children
- Common > Read
- Common > Write

To delete a computer

- In FactoryTalk Administration Console Explorer, expand System > Computers and Groups > Computers, right-click the computer account, and then select Delete.

See also

Add a computer on page 59

Manage computers on page 59

Modify the name of a computer, its description, and the computer groups to which it belongs in General Computer Properties.

Prerequisites

Editing or viewing computer properties requires these permissions:

- Common > List Children
- Common > Read
- Common > Write

To edit or view computer properties

1. In FactoryTalk Administration Console Explorer, expand System > Computers and Groups > Computers, right-click the computer account, and select Properties.

2. Edit these settings in General Computer Properties as appropriate:
• **Computer name.** Type the new Windows computer name for the computer, or select **Browse (…)** to browse for the compute

• **Description.** Enter or edit a description of the computer, or other data about the computer account, such as contact information.

• **Add.** Select to add this computer to one or more computer groups.

• **Remove.** Select to remove this computer from a group.

3. Select **OK** to apply the edits to the computer.

**See also**

- [Add a computer](#) on page 59

Change a computer name in the FactoryTalk network directory

- [Manage computers](#) on page 59
Add and remove user-computer pairs

Security for FactoryTalk resources is always tied to users or groups of users, the actions the users perform, for example, read, write, and so on, and the computers, or groups of computers where the users work.

This ensures that only authorized personnel can perform actions on the equipment and resources in the system from appropriate locations, for example, computers located within line of sight of equipment.

Available options are:

- Add a user-computer pair
- Remove a user-computer pair

See also

Add a user-computer pair on page 63
Remove a user-computer pair on page 65

Add a user-computer pair

How do I open Select User and Computer?

1. In the FactoryTalk Administration Console Explorer, right-click an item and select Security.

2. On the Permissions tab, select Add.

-or-

1. In the FactoryTalk Administration Console Explorer, expand System > Policies > Product Policies and open a Feature Security item.


3. In Configure Securable Action, select Add.

Use Select User and Computer to pair a group of users, or an individual user, with a group of computers, or an individual computer. Then, specify security
settings for the pair. For example, set permissions for a resource that allow or deny access to the pair.

Prerequisites

- Obtain the appropriate permissions to specify security settings on the selected resource.

To add a user-computer pair

1. Navigate to Select User and Computer.

2. Under Filter Users, to limit the user accounts displayed in the Users list and define the type of user accounts that can be created, select either:
   - Show groups only
     New user groups and Windows-linked groups can be created if needed
   - Show users only
     New FactoryTalk User and Windows-linked user accounts can be created if needed
   - Show all
     New accounts cannot be created when this option is selected.

3. (optional) To create a new user or group account, select Create New, choose the type of account to create, and then specify the account settings.

4. In the Users list, select a user account or user group account.

5. Under Filter Computers, to limit the computer accounts displayed in the Computers list and define the type of computer accounts that can be created, select either:
   - Show groups only
     New computer group accounts can be created if needed
   - Show users only
     New computer accounts can be created if needed
   - Show all
     New computer accounts cannot be created when this option is selected.

6. (optional) To create a new computer or computer group account, select Create New, choose the type of account to create, and then specify the account settings.
7. In the **Computers** list, select a computer account or computer group account.

8. Select **OK**.

   The selected user-computer pair displays in the permissions list. Explicit permissions can now be configured for the pair.

**See also**

[Remove a user-computer pair on page 65](#)

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**Remove a user-computer pair**

How do I open Select User and Computer?

1. In the FactoryTalk Administration Console Explorer, right-click an item and select **Security**.

2. On the **Permissions** tab, select **Add**.

   -or-

   1. In the FactoryTalk Administration Console Explorer, expand **System > Policies >Product Policies** and open a **Feature Security** item.

   2. From the **Feature Security Properties Policy Setting** tab, select **Configure Security**.

   3. In **Configure Securable Action**, select **Add**.

Remove a user-computer pair when it is longer necessary to specify permissions on a resource for the pair.

**Prerequisites**

- Obtain the appropriate permissions to specify security settings on the selected resource.

**To remove a user-computer pair**

1. Navigate to **Select User and Computer**, select the filter criteria to show the list of the users and user groups, and computers or computer groups to delete.

2. In the **Users** list, select the user account or user group account that belongs to the pair being deleted.

3. In the **Computers** list, select a computer account or computer group account that belongs to the pair being deleted.
4. Select Remove.

5. Select OK.

See also

Add a user-computer pair on page 63

Use these steps to view and edit the general properties of a FactoryTalk user account, such as user name and password, user description, user email address, and user password access options. These properties are only viewable for a Windows-linked user account and cannot be edited. Use Windows to edit the general properties of a Windows-linked user account.

Prerequisites

Obtain these permissions in the Users folder in FactoryTalk Administration Console Explorer:

- Common > List Children
- Common > Read
- Common > Write

To edit or view user account properties

1. In FactoryTalk Administration Console Explorer, expand the FactoryTalk network or local directory tree. Expand the System > Users and Groups folder to see the user account.

2. Right-click the user account, and select Properties. Edit the General User Properties settings as needed.

Complete the User name, Full name, Password, and Confirm fields. (optional) Complete Description, E-mail, and password settings.

3. Select OK.

Tip: Changing the properties of a FactoryTalk user account in one FactoryTalk directory does not modify the properties in the other, even if the account has the same name in both directories. Before editing the properties of a user account, log on the FactoryTalk directory that contains the user account.

See also

Add a FactoryTalk user account on page 43

Manage users on page 43
Add and remove action groups

Add and remove action groups

To avoid setting permissions for individual actions, group actions together to grant or deny permissions for a set of actions in one step.

When adding an action group, decide:

• The name of the action group
• What actions belong to that group

Use action groups to assign permissions based on any convenient grouping. For example:

• A person’s role or job (operator, supervisor, maintenance engineer, and so on)
• The equipment a person has access to (hoppers, mixers, ovens, and so on)

When setting security using action groups:

• Add an action group
• Add actions to an action group
• Remove actions from an action group
• Delete an action group

See also

Add an action group on page 69
Delete an action group on page 71
Add an action to an action group on page 71

Add an action group

Group actions together to grant or deny permissions for a set of actions in one step rather than having to set permissions for each action separately.

When adding an action group, decide:

• The name of the action group
Chapter 8  Add and remove action groups

- What actions belong to that group

**Prerequisites**

Obtain these security permissions for the *Action Groups* folder in *Explorer*:

- Common > Read
- Common > List Children
- Common > Create Children
- Common > Write

**To add an action group**

- In FactoryTalk Administration Console *Explorer*, right-click the *Action Groups* folder and select *New Action Group*.

**See also**

- [Delete an action group](#) on page 70
- [Add and remove action groups](#) on page 69

**Delete an action group**

When an action group is deleted, any explicit permissions assigned to that group are no longer in effect.

For example, suppose an action group named "Operators" was used to explicitly grant write access to an area named "Mixing" for a user account "Chris". If the "Operators" action group is deleted, "Chris" can no longer write to the "Mixing" area. Creating another "Operators" action group will not restore "Chris" the ability to write to "Mixing".

If an action group is inadvertently deleted and restoring the FactoryTalk Directory from a backup is not feasible, all security permissions assigned to the resources that were using the action group must be recreated.

**Prerequisites**

1. Before deleting an action group, back up the FactoryTalk Directory.
2. Deleting an acting group requires these security permissions for the *Action Groups* folder:
Add and remove action groups

Chapter 8

Add and remove action groups

To delete an action group

1. In FactoryTalk Administration Console Explorer, expand the Action Groups folder.

2. Right-click the action group and select Delete.

Prerequisites

Adding an action to an action group requires these permissions for the Action Groups folder in FactoryTalk Administration Console Explorer:

- Common > Read
- Common > List Children
- Common > Create Children
- Common > Write

To add an action to an action group

1. In FactoryTalk Administration Console Explorer, expand Action Groups, then right-click the action group to edit, and select Properties.

2. In Properties, the action group appears on the right in the Selected actions and action groups list.

3. In the Available Actions and Action Groups list, select the action to add to the action group, and select >>.

4. Select OK.
Remove an action from an action group

To stop managing security settings for a particular action as part of an action group, remove the action from the action group.

Prerequisites

Removing an action from an action group requires these security permissions for the Action Groups folder in FactoryTalk Administration Console Explorer:

- Common > Read
- Common > List Children
- Common > Create Children
- Common > Write

To remove an action from an action group

1. In FactoryTalk Administration Console Explorer, expand Action Groups, right-click the action group to edit, and select Properties.
2. In Properties, the action group appears on the right in the Selected actions and action groups list.
3. In the Selected Actions and Action Groups list, select the action to remove from the action group, and select << to remove it from the group.
4. Select OK.

See also

Add and remove action groups on page 69
Set system policies

Set system policies to manage settings that apply across the entire FactoryTalk system. Policy settings are separate in the network directory and the local directory.

Navigate to **System > Policies > System Policies** to view and edit the following:

- **Application Authorization**
  Determines whether applications can access the FactoryTalk Directory.

- **User Rights Assignment**
  Determines which users can perform system-wide actions, such as backing up and restoring the contents of the FactoryTalk Directory, changing the directory server computer, performing a manual switchover to a redundant server, and modifying the security authority identifier.

- **Live Data Policy**
  Determines the default communications protocol for a distributed FactoryTalk system.

- **Health Monitoring Policy**
  Defines the parameters that the health monitoring service uses when determining if a network error occurred and how long to wait before switching to a standby server.

- **Audit Policy**
  Defines which activities generate an audit message.

- **Security Policy**
  Defines the security policies applied to FactoryTalk account, divided into these categories: account policy, computer policy, directory protection policy, password policy, and single sign-on policy. These policies do not apply to Windows-linked accounts. Define policies for Windows-linked accounts in Windows.
Authorize an application to access the FactoryTalk Directory

Use FactoryTalk Service Application Authorization to authorize applications to access the FactoryTalk Directory.

If the option to verify the publisher certificate information is enabled, applications that are not signed by Rockwell Automation or Microsoft are not allowed access to the FactoryTalk Directory.

Tip: To configure the Application Authorization policy, log into FactoryTalk with an account that is a member of the FactoryTalk Administrators group.

To authorize an application to access the FactoryTalk Directory

1. Log on to the FactoryTalk network directory or FactoryTalk local directory.

2. In FactoryTalk Administration Console Explorer, expand the System > Policies > System Policies folders.


   The Application Authorization policy controls access by monitoring information about each application that is requesting a service token from FactoryTalk.

4. In FactoryTalk Service Application Authorization, review the list of the applications that can be authorized. To sort the application list by process name, computer name, or access allowed status, select the corresponding column header at the top of the window.

   Some applications are required by FactoryTalk and cannot be removed or denied. These entries are displayed with gray text in the list.

5. (optional) To view the publisher certificate information for a process, select the desired cell in the Publisher Info column.
6. Select a process, and scroll to the right to view its access status. Select Access Allowed to provide access to the FactoryTalk Directory, or clear to deny access to the FactoryTalk Directory.

7. (optional) To automatically enable access to the FactoryTalk Directory for any new process, select Enable Default Access.

8. (optional) To automatically block access to the FactoryTalk Directory for any new process, clear Enable Default Access.

9. (optional) To verify publication information for all FactoryTalk Services Platform processes, select Verify Publisher Info. If the verification process fails, the process is automatically denied access.

10. Select OK.

See also

FactoryTalk Service Application Authorization settings on page 76

Publisher Certificate Information on page 78

Digitally signed FactoryTalk products on page 78

How do I open FactoryTalk Service Application Authorization?

1. Start FactoryTalk Administration Console or FactoryTalk View Studio and then log on to the FactoryTalk Network Directory or FactoryTalk Local Directory where you want to modify application authorization policies.

2. In the Explorer window, expand the System > Policies > System Policies folders.


Use FactoryTalk Service Application Authorization to authorize the applications that have access to FactoryTalk Directory. By default FactoryTalk Services Platform processes are automatically allowed access.

If the Verify publisher information option is enabled, applications that are not signed by Rockwell Automation or Microsoft are not allowed access to FactoryTalk Directory.

Tip: To configure the Application Authorization policy, log into FactoryTalk with an account that is a member of the FactoryTalk Administrators group.

See also

Authorize an application to access the FactoryTalk Directory on page 74
Use **FactoryTalk Service Application Authorization** settings to authorize the applications that have access to FactoryTalk Directory.

If the **Verify Publisher Info** option is selected, applications that are not signed by Rockwell Automation or Microsoft are not allowed access to FactoryTalk Directory.

The **Application Authorization** policy controls access by monitoring the information of each application that is requesting a service token from FactoryTalk. To configure the **Application Authorization** policy, log into FactoryTalk with an account that is a member of the FactoryTalk Administrators group.

To sort the application list by process name, version number, computer name, publisher, or access allowed status, select the corresponding column header.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process</td>
<td>Shows the process name of the application that is requesting a service token. Some applications are required by FactoryTalk and cannot be removed or denied. These entries appear with gray text in the list. To sort the application list by process name, computer name, or access allowed status, select the corresponding column header.</td>
</tr>
<tr>
<td>Version</td>
<td>Shows the version number of the application that is requesting a service token.</td>
</tr>
<tr>
<td>Computer</td>
<td>Shows the computer name where the application runs. To sort the application list by process name, computer name, or access allowed status, select the corresponding column header.</td>
</tr>
<tr>
<td>Publisher Info</td>
<td>Shows the publisher name of the application. If no certificate exists, the cell displays with None. To view the detailed publisher certification information, select the desired cell in this column.</td>
</tr>
<tr>
<td>Access Allowed</td>
<td>Shows whether the current process is allowed to access to FactoryTalk Directory and determines whether an application is authorized to access the FactoryTalk Directory. To deny an application, clear the check box of the entry. If an application is denied access and fails the request for service token, a message is sent to FactoryTalk Diagnostics, for example, <em>Login failure for application [RNASecurityTestClient.exe] on directory [Network]. The application was denied access.</em> View the messages using the FactoryTalk Diagnostics Viewer. Some applications are required by FactoryTalk and cannot be removed or denied. These entries are displayed with gray text in the list.</td>
</tr>
</tbody>
</table>

Use these settings to specify how FactoryTalk allows access to the FactoryTalk Directory.
Setting | Description
--- | ---
Enable Default Access | Determines whether new applications are automatically allowed access to FactoryTalk Directory.  
**Default:** Enabled  
To disable the default access, clear the check box. All new applications are automatically denied access.  
If the default access of a FactoryTalk Directory server is disabled, you can still configure your local computer to join the directory server.

Verify Publisher Info | Determines whether to verify the publisher certificate information of FactoryTalk applications.  
If enabled, FactoryTalk Services Platform verifies whether the application requesting a service token is signed by Rockwell Automation or Microsoft. Any application not signed by them will fail to receive a service token.  
**Default:** Disabled  
To disable the publisher information verification, clear the check box. FactoryTalk Services Platform does not verify the publisher information. Applications are verified by the corresponding Access Allowed settings.  
Some earlier versions of Microsoft applications (for example, msiexec.exe) and FactoryTalk products were not signed when released. The publisher information on these applications may fail verification.

Remove | To remove one or more applications from the list, select the entries and select **Remove**.  
Some applications are required by FactoryTalk and cannot be removed or denied. These entries appear with gray text in the list. When removing one or more of these required entries, a warning message displays indicating that the required entries are not removed.

Refresh | Manually refresh the list to show the latest application list. Select **Refresh**.  
When refreshing the list, if a newer version of an existing application from the same computer is found, the entry is updated to reflect the new version or certificate information.  
Save the changes before refreshing. Any changes that are not saved will be lost when refreshing.

**Required FactoryTalk Processes**

<table>
<thead>
<tr>
<th>Process name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FTDataUpdate.exe</td>
<td>FactoryTalk data update, which runs during FactoryTalk Directory configuration.</td>
</tr>
<tr>
<td>FTDConfigurationUtility.exe</td>
<td>FactoryTalk Configuration wizard, which is only used in special cases to repair the FactoryTalk Directory.</td>
</tr>
<tr>
<td>FTEexportPolicy.exe</td>
<td>Controls FactoryTalk export of policy settings during backup.</td>
</tr>
<tr>
<td>FTSelDirSrv.exe</td>
<td>Used to set the FactoryTalk Directory.</td>
</tr>
<tr>
<td>FTSPVStudio.exe</td>
<td>FactoryTalk Administration Console</td>
</tr>
<tr>
<td>ImportExportTool.exe</td>
<td>Used to import and export FactoryTalk information.</td>
</tr>
<tr>
<td>NmspHost.exe</td>
<td>FactoryTalk namespace services</td>
</tr>
<tr>
<td>RdcyHost.exe</td>
<td>Rockwell redundancy services</td>
</tr>
<tr>
<td>RnaDirMultiplexor.exe</td>
<td>Rockwell RNA directory multiplexer</td>
</tr>
<tr>
<td>RsvcHost.exe</td>
<td>Rockwell Automation services</td>
</tr>
<tr>
<td>SilentFTDCW.exe</td>
<td>FactoryTalk Directory Silent Configuration Wizard</td>
</tr>
</tbody>
</table>
See also

Authorize an application to access the FactoryTalk Directory on page 74

Publisher Certificate Information on page 78

Digitally signed FactoryTalk products on page 78

Publisher Certificate Information

Use Publisher Certificate Information to view digital signature details and verify the identity and authenticity of software.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issued to</td>
<td>Shows the publisher name (or a portion of the name) of the entity to which the certificate is issued.</td>
</tr>
<tr>
<td>Issued by</td>
<td>Shows the name (or a portion of the name) of the issuer.</td>
</tr>
<tr>
<td>Status</td>
<td>Shows the status of the certificate, for example, valid, revoked, or expired.</td>
</tr>
<tr>
<td>Serial #</td>
<td>Shows the unique serial number (or a portion of the serial number) of the certificate.</td>
</tr>
<tr>
<td>Date signed</td>
<td>Shows the date when the binary was signed.</td>
</tr>
<tr>
<td>Valid from</td>
<td>Shows the beginning date of the period for which the certificate is valid.</td>
</tr>
<tr>
<td>Valid to</td>
<td>Shows the ending date of the period for which the certificate is valid.</td>
</tr>
</tbody>
</table>

See also

Authorize an application to access the FactoryTalk Directory on page 74

FactoryTalk Service Application Authorization settings on page 76

Digitally signed FactoryTalk products on page 78

Digitally signed FactoryTalk products

FactoryTalk Services Platform 2.51 or later provides the ability to verify whether an application requesting a service token is signed by Rockwell Automation. The access to FactoryTalk Directory is denied if the certification is not signed by Rockwell Automation.

Some earlier versions of FactoryTalk products were not signed when released. These products may fail to verify the publisher information.

This table shows which versions of FactoryTalk products are signed.

<table>
<thead>
<tr>
<th>Products</th>
<th>Signed since version</th>
</tr>
</thead>
<tbody>
<tr>
<td>FactoryTalk Administration Console</td>
<td>2.10.01</td>
</tr>
<tr>
<td>FactoryTalk Administration Console</td>
<td>2.31.00</td>
</tr>
<tr>
<td>FactoryTalk Batch</td>
<td>11.00</td>
</tr>
<tr>
<td>eProcedure®</td>
<td>11.00</td>
</tr>
<tr>
<td>FactoryTalk Linx</td>
<td>5.20</td>
</tr>
<tr>
<td>FactoryTalk Linx Gateway</td>
<td>3.02</td>
</tr>
<tr>
<td>FactoryTalk Historian SE</td>
<td>3.0</td>
</tr>
</tbody>
</table>
Assign user rights to make system policy changes

In **User Rights Assignment Policy Properties**, specify which users are permitted to:

- Back up or restore FactoryTalk Directory, the System folder, or applications
- Change the FactoryTalk Directory server computer
- Switch between primary and secondary servers in a redundant pair (for example, HMI servers, or data servers)
- Modify the security authority identifier

Policy settings are completely separate in the network directory and local directory. The network directory and local directory also have different default policy settings.

**To assign user rights to system policy changes**

1. Log into the FactoryTalk directory.

2. In FactoryTalk Administration Console **Explorer**, expand **System** > **Policies** > **System Policies**.

3. Right-click **User Rights Assignment** and select **Properties**.

4. In **User Rights Assignment Policies**, next to the policy to secure and to the right of **Configure Security**, select **Browse (...)**.

5. In **Configure Securable Action**, on the **Policy Setting** tab, select **Add. Select User or Group** opens.
6. (optional) Use the filter options to restrict the accounts shown in the lists.

7. Choose the user or group account, then select OK. The user or group is added to the list on the Policy Setting tab.
   
   • To allow the user permission to perform the action from the specified computer or group, select Allow.
   
   • To deny the user permissions to perform the action from the specified computer or group, select Deny.
   
   • To remove explicit Allow permissions, select the user and computer and select Remove. If no permissions are specified, Deny is implied.

8. When finished, select OK to apply the policy changes.

See also

User rights assignment policies on page 80

Permissions on page 138

User rights assignment policies

In FactoryTalk, administrators control the rights that users have to access the system. Settings that apply to the entire FactoryTalk directory are especially important to secure. User rights assignment policies specify which users are permitted to perform:

• **Back up or restore FactoryTalk Directory, the System folder, or applications.** The default setting allows all users to back up and restore the directory and its contents. Securing backup and restore operations prevents an unauthorized user from:
  
  • Copying applications or user account information in the FactoryTalk system
  
  • Intentionally or inadvertently overwriting the contents of FactoryTalk Directory, including applications, user, computer, and group accounts, passwords, policy settings, and security settings

• **Change the FactoryTalk Directory server computer.**
  
  The default setting allows administrators to change the directory server. The policy appears in only FactoryTalk network directory. Verify the permissions to change the directory on the current computer and the computer being switched to.

• **Switch between primary and secondary servers in a redundant pair.** In the FactoryTalk network directory, the default setting allows all users to switch between primary and secondary servers (such as HMI servers or data servers). Because redundancy is available in only the FactoryTalk network
directory, this policy setting appears in only the FactoryTalk network directory.

- **Modify the security authority identifier.**
  
The default setting allows all users to modify the identifier.

Policy settings are completely separate in the network directory and local directory. The network directory and local directory also have different default policy settings.

**See also**

- [Assign user rights to make system policy changes](#) on page 79
- [User Rights Assignment Policy Properties](#) on page 81

---

**User Rights Assignment Policy Properties**

How do I open User Rights Assignment Policy Properties?

1. Start FactoryTalk Administration Console or FactoryTalk View Studio and then log on to the FactoryTalk Network Directory or FactoryTalk Local Directory where you want to edit policies.

2. In the Explorer window, expand the FactoryTalk Network or Local Directory tree, and then expand the **System > Policies > System Policies** folders.

3. Double-click **User Rights Assignment**.

In **User Rights Assignment Policy Properties**, specify which users are permitted to:

- Back up or restore FactoryTalk Directory, the System folder, or applications
- Change the FactoryTalk Directory server computer
- Switch between primary and secondary servers in a redundant pair (for example, HMI servers, or data servers)
- Modify the security authority identifier

Policy settings are completely separate in the network directory and local directory. The network directory and local directory also have different default policy settings.

**See also**

- [Assign user rights to make system policy changes](#) on page 79
Configure Securable Action

How do I open Configure Securable Action?

1. Start FactoryTalk Administration Console or FactoryTalk View Studio and then log on to the FactoryTalk Network Directory or FactoryTalk Local Directory where you want to modify product policies.

2. In the Explorer window, expand the System folder > Policies > Product Policies, expand the folder for the product whose policies you want to secure, and then double-click Feature Security.

3. In the Feature Security Properties dialog box, click the row containing the feature you want to secure. A description of the feature appears at the bottom of the dialog box.

4. Click the Browse button beside the feature you want to secure. This opens the Configure Securable Action dialog box.

Use Configure Securable Action to view or set the permissions that determine access to a single feature for a user or group of users working from a computer or group of computers connected to the FactoryTalk network directory. The product policy features that can be secured depend on what FactoryTalk products are installed.

Use this window to configure permissions for the actions in User Rights and Assignment Properties.

In a FactoryTalk local directory, all security settings apply to only the local computer.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permissions list</td>
<td>Shows the users and computers that have Allow or Deny permissions set for this feature. To allow access to the feature, select Allow. To deny access to the feature, select Deny. If both Allow and Deny are cleared, the user is denied access to the feature.</td>
</tr>
<tr>
<td>Add</td>
<td>Select to add users and computers to the permissions list to set explicit permissions.</td>
</tr>
<tr>
<td>Remove</td>
<td>In the permissions list, select the combination of users and computers for which to remove security settings, and select Remove.</td>
</tr>
</tbody>
</table>

See also

Secure features of a single product on page 116

Effective permission icons on page 160
Select a user or group

Use Select User or Group to select a user account or FactoryTalk user group account. You can then specify security settings for the user or group.

Use the options under Filters to show only users, only user groups, or all accounts you may add to the group.

To select a user or group

1. Right-click the FactoryTalk user group account you wish to modify and click Properties.

2. In User Group Properties, click Add.

3. At the bottom of Select User or Group, select the filter criteria that show the users or groups you want to select.

4. Do one of the following:

   - In the list of users and groups, select a user account or user group account.
   - To create a new user account, click Create New and then click the type of account you want to create.

5. When you are finished selecting a user or group account, click OK.

See also

Manage user groups on page 51

Accounts and groups on page 18

Account types on page 20

Change the default communications protocol

To change the default communications protocol for a distributed FactoryTalk system, use Live Data Policy Properties.

Change this setting only if necessary. For example, if the system experiences communications problems and troubleshooting requires switching to DCOM. Thoroughly test communications before deploying this change to a running production system. Keep in mind that many factors affect communications, including firewalls, closed ports, and differences in network architectures and configurations.

To change the default communications protocol

1. In FactoryTalk Administration Console Explorer, expand System > Policies > System Policies.
2. Right-click Live Data Policy and select Properties.

3. From the list to the right of Default Protocol Setting, switch the default communications protocol from TCP/IP to DCOM, or from DCOM to TCP/IP.

4. Select OK.

5. Shut down and restart all computers on the network.

See also

Live Data Policy Properties on page 85

In a FactoryTalk distributed system, the communications protocol affects communications between client and server services and between the FactoryTalk Directory and servers on the network. This setting is considered a "default" because if the FactoryTalk Live Data service detects that some components on the network are not compatible with the selected policy setting, the service overrides the policy and uses whichever setting is most likely to ensure uninterrupted communications. For example, for third-party servers and RSLinx Classic, FactoryTalk Live Data does not attempt a TCP/IP connection and always uses DCOM.

Use the Policy Settings tab of Live Data Policy Properties to set the default protocol from TCP/IP to DCOM or vice versa.

The FactoryTalk Services Platform installation process evaluates the services and components on the network and sets the communication protocol appropriately. For example, if upgrading from an earlier version of the FactoryTalk platform to FactoryTalk Services Platform 2.10 (CPR 9) or later, the communications default is automatically set to DCOM. If installing FactoryTalk Services Platform 2.10 or later for the first time on a computer, the communications default is automatically set to TCP/IP. Typically, changing the default setting is not necessary or advisable.

<table>
<thead>
<tr>
<th>Default protocol setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TCP/IP</td>
<td>An open communications protocol that typically is more reliable and has better performance than the proprietary DCOM protocol.</td>
</tr>
<tr>
<td></td>
<td>• Choose this option only if all or most of the clients and servers on the automation network are upgraded to use FactoryTalk Services Platform v. 2.10 (CPR 9) or later.</td>
</tr>
<tr>
<td></td>
<td>• Do not choose this option if the automation network is using older versions of the FactoryTalk Automation Platform v.2.00 (CPR 7) or earlier or if the system includes many third-party OPC servers and devices.</td>
</tr>
<tr>
<td></td>
<td>When this setting is changed from DCOM to TCP/IP, an audit message is logged to FactoryTalk Diagnostics indicating that the value changed from False to True.</td>
</tr>
</tbody>
</table>
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DCOM

A proprietary communications protocol owned and managed by Microsoft.

Choose this option if:

- Most of the clients and servers on the automation network are using older versions of FactoryTalk Automation Platform (v. 2.00, CPR 7 or earlier)
- The system includes third-party OPC servers and devices

When this setting is changed from TCP/IP to DCOM, an audit message is logged to FactoryTalk Diagnostics indicating that the value changed from True to False.

See also

Change the default communications protocol on page 83

FactoryTalk Directory types on page 17

Live Data Policy Properties

How do I open Live Data Policy Properties?

In the Explorer window, expand System > Policies > System Policies. Double-click Live Data Policy.

Use the Policy Settings tab of Live Data Policy Properties to select a default communications protocol for a distributed FactoryTalk system.

This setting affects communications between client and server services and between the FactoryTalk Directory and servers on the network. This setting is considered a “default”. If the FactoryTalk Live Data service detects that some components on the network are not compatible with the selected policy setting, the service overrides the policy and uses whichever setting is most likely to ensure uninterrupted communications. For example, for third-party servers and RSLinx Classic, FactoryTalk Live Data does not attempt a TCP/IP connection and always uses DCOM.

Change this setting only if necessary, such as if the system is experiencing communications problems and it is necessary to switch to DCOM for troubleshooting purposes. Thoroughly test communications before deploying this change to a running production system. Many factors affect communications, including firewalls, closed ports, and differences in network architectures and configurations.

Important:

Changing this policy setting can have unexpected results. Do not change this setting in a running production system. For changes to take effect, shut down and restart all computers on the network.

See also

Change the default communications protocol on page 83

Default communications protocol settings on page 84

FactoryTalk Directory types on page 17
Set network health monitoring policies

Use **Health Monitoring Policy Properties** to fine tune the parameters that the system uses when determining whether a network failure is occurring and how long to wait before switching to a Standby server.

A network failure occurs when a server is temporarily unable to communicate with other computers because of network traffic and fluctuations. During a network failure, even though the computers in the redundant server pair cannot communicate, the active server remains active and the standby server remains on standby.

**Tip:** Changing health monitoring policy settings can have unexpected results. The preset default settings typically provide optimal efficiency for most networks.

### To set network health monitoring policies

1. In FactoryTalk Administration Console Explorer, expand **System > Policies > System Policies**.
2. Right-click **Health Monitoring Policy** and select **Properties**.
3. Under **Rates**, select the policy setting to edit. A description of the policy appears at in the bottom pane of the window.
4. To the right of the current rate, select the **down arrow** to enter a new number, or use the small up and down arrows to choose a higher or lower number.
5. Select **OK**.

**See also**

**Health Monitoring Policy Properties** on page 86

---

**Health Monitoring Policy Properties**

How do I open Health Monitoring Policy Properties?

1. Run FactoryTalk Administration Console or FactoryTalk View Studio.
2. In the Explorer window, expand the folders **System > Policies > System Policies**.
3. Double-click the **Health Monitoring Policy** icon.

Use **Policy Settings** in **Health Monitoring Policy Properties** to change parameters that determine whether a network failure is occurring and how long to wait before switching to a standby server.
To monitor system health messages, use the FactoryTalk Diagnostics Viewer.

A network failure occurs when a server is temporarily unable to communicate with other computers because of network traffic and fluctuations. During a network failure, even though the computers in a server pair cannot communicate, the active server remains active and the standby server remains on standby.

When these policy settings are applied, the changes affect all computers that are clients of the FactoryTalk network directory server. The changes take effect immediately, as soon as the network directory server notifies the client computers of the changes.

Important: Changing health monitoring policy settings can have unexpected results. The preset default settings typically provide optimal efficiency for most networks.

The health monitoring service policies settings are:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Rates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer detection interval</td>
<td>Sets the amount of time that the health monitoring service waits between its attempts to detect the existence of a computer on the network. If the service does not receive a response, it continues its detection attempts at the specified intervals. Once a connection is made, the health monitoring service stops sending &quot;Computer detection&quot; requests and begins sending &quot;Network failure detection&quot; requests to the computer.</td>
<td>Default. 2 seconds</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Minimum. 1 second</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Maximum. 600 seconds</td>
</tr>
<tr>
<td>Network failure detection interval</td>
<td>Sets how often the health monitoring service attempts to verify the health of the network connection to remote computers. The health monitoring service begins sending &quot;Network failure detection&quot; requests after establishing the existence of a computer on the network. This request expects a reply back from the remote computer within the amount of time specified. If a reply is received, then the network connection is considered to be healthy. If a reply is not received, the service continues sending &quot;Network failure detection&quot; requests at the specified intervals until the amount of time specified as the &quot;Maximum network glitch&quot; is reached.</td>
<td>Default. 2 seconds</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Minimum. 1 second</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Maximum. 600 seconds</td>
</tr>
<tr>
<td>Maximum network glitch</td>
<td>Sets the maximum duration of a network disruption before the health monitoring service determines that communications failed. If a network disruption lasts longer than this amount of time, the health monitoring service generates a diagnostic message and begins sending &quot;Machine detection&quot; requests to verify the existence of the standby server.</td>
<td>Default. 5 seconds</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Minimum. 1 second</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Maximum. 600 seconds</td>
</tr>
<tr>
<td>Maximum delay before server is active</td>
<td>Sets the maximum amount of time during a switch back that the server becoming active waits for clients to be ready for the switch. The purpose of the delay is to allow clients to establish connections to the server that is ready to become active. When the switch back occurs, data is available to the clients as soon as possible. As soon as all clients successfully connect, the server switches over to active immediately, even if the maximum delay was not yet reached. If the maximum delay is too short, the active server may not be able to provide high-quality service to its clients. Poor client performance and a diagnostic message stating that the server switched to active before all clients finish connecting may be observed.</td>
<td>Default. 2 minutes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Minimum. 0 minutes (not recommended)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Maximum. 60 minutes</td>
</tr>
</tbody>
</table>
### Set audit policies

Use Audit Policy Properties to specify what security-related information is recorded while the system is being used. Audit policies include whether access checks are audited, whether access grants, denies, or both are audited, and so on. Audit messages are sent to FactoryTalk Diagnostics, and are viewed using the FactoryTalk Diagnostics Viewer.

#### To set up audit policies

1. In FactoryTalk Administration Console Explorer, expand System > Policies > System Policies.
2. Right-click Audit Policy and select Properties.
3. In Audit Policy Properties, for each policy setting listed choose either Enabled or Disabled.

   a. **Audit changes to configuration and control system**
      - **Enabled** (default) - Generates audit messages when configuration and control system changes occur across the FactoryTalk system.
      - **Disabled** - Does not route audit messages to FactoryTalk Diagnostics log files, even if logging destinations are configured for audit messages on the Message Routing tab in FactoryTalk Diagnostics Setup.

      Any changes made to the value of the Audit changes to configuration and control system policy itself are always recorded, regardless of whether audit logging is enabled or disabled. If enabled, audit information is sent to FactoryTalk Diagnostics.

   b. **Audit security access failures**
      - **Enabled** - Generates audit messages when users fail to access objects or features because of insufficient security permissions.
      - **Disabled** (default) - Does not generate audit messages when users fail to access secured objects or features.

   c. **Audit security access successes**
      - **Enabled** - Generates audit messages when users succeed in accessing objects or features because of sufficient security permissions.
• **Disabled** (default) - Does not generate audit messages when users succeed in accessing objects or features because of sufficient security permissions.

When enabled, this policy might generate a large number of audit messages. Enable this policy only if there is a specific reason, for example, testing or troubleshooting whether users are able to access particular features or objects in the system. If enabled, audit information is sent to FactoryTalk Diagnostics.

4. Select **OK**.

**See also**

- *Audit policies* on page 89
- *Audit trails and regulatory compliance* on page 36
- *Example: Audit messages* on page 93

**Audit policies**

Auditing user actions in a control system helps answer "who changed this process variable, when, and why?"

In an industry that must comply with governmental regulations, such as U.S. Government 21 CFR Part 11, the plant must be able to answer this question. The answer is also important if the plant manufactures products with critical tolerances, or if unmanaged changes could negatively affect product quality or risk consumer safety.

An audit trail records:

- The specific, authenticated user who is authorized to access the manufacturing system
- The action taken—typically an operation that affects the manufacturing control system or that creates, modifies, or deletes some element of the manufacturing process
- The resource—an object such as a PLC-5®, application, tag, or command, on which the user performs an action
- The computer from which the user performed the action
- The date and time when the user performed the action

Like other FactoryTalk policy settings, audit policies are managed separately in the network directory and the local directory.
Auditing changes to the system configuration, and to the control system

The FactoryTalk system generates and sends audit messages to FactoryTalk Diagnostics. A system-wide policy setting controls whether audit records are generated and logged. If the system policy is enabled, then FactoryTalk Diagnostics routes the audit messages to various logging destinations, including the FactoryTalk Audit Log. If the system policy is disabled, then FactoryTalk Diagnostics ignores audit messages generated by FactoryTalk components and FactoryTalk products and does not route them for logging.

Each FactoryTalk product defines its own rules for auditing changes. This means that the messages that appear in the FactoryTalk Diagnostics Viewer vary, depending on what products are installed. If the setting Audit changes to configuration and control system is enabled, audit messages are generated when any configuration and control system changes occur across the FactoryTalk system.

Auditing security access failures and successes

Whenever a user attempts to access a secured resource, FactoryTalk Security can generate audit messages if the user was denied or granted access.

For example, suppose an area named Ingredients is secured so that only members of the OperatorsLine5 group can write to the area. If the Audit object access success policy is enabled, every time an operator is granted write access to this area, a message is logged to FactoryTalk Diagnostics. If Audit object access failure policy is enabled, every time an operator is refused Write access to this area, a message is logged to FactoryTalk Diagnostics.

Object access failures do not necessarily represent deliberate attempts to compromise the security of the system. For example, an object access failure message is logged if a user is denied Configure Security permission and right-clicks the Users and Groups folder.

Auditing security access success can consume large amounts of system resources. Enable this policy only when necessary, for example, while testing the system, or if required in industries that must comply with governmental regulations.

Examples of messages for auditing security access failures and successes:

- User NETWORK\JSMITH attempted to perform action COMMON\WRITE from NETWORK\DOMAIN\COMPUTER5 on [OPC data server]!RNA://$Global/Norms Bakery/Ingredients/RecipeDataServer and was granted access
- User NETWORK\JSMITH attempted to perform action COMMON\CONFIGURE SECURITY from
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NETWORK\DOMAIN\COMPUTER5 on [directory]\$System] and was denied access

See also

Set audit policies on page 88

Audit trails and regulatory compliance on page 36

Example: Audit messages on page 93

Audit Policy Properties

How do I open Audit Policy Properties?

1. Start FactoryTalk Administration Console or FactoryTalk View Studio and then log on to the FactoryTalk Network Directory or FactoryTalk Local Directory where you want to modify audit policies.

2. In the Explorer window, expand the System folder > Policies > System Policies.

3. Double-click the Audit Policy icon.

Use Audit Policy Properties to specify what security-related information is recorded while the system is being used. Audit policies include whether access checks are audited, whether access grants, denies, or both are audited, and so on. Audit messages are sent to FactoryTalk Diagnostics, where they can be viewed using the FactoryTalk Diagnostics Viewer. Use these settings to specify what information is audited by the FactoryTalk system.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
</table>
| Audit changes to configuration and control system | Determines whether to generate audit messages when configuration and control system changes occur across the FactoryTalk system.  
**Default**: Enabled  
To disable audit logging, set this policy to **Disabled**.  
If this policy is disabled, audit messages are not routed to FactoryTalk Diagnostics log files, even if logging destinations are configured for audit messages on the **Message Routing** tab in Diagnostics Setup.  
Any changes made to the value of the Audit changes to configuration and control system policy itself are always recorded, regardless of whether audit logging is enabled or disabled. If enabled, audit information is sent to FactoryTalk Diagnostics. |
| Audit security access failures                | Determines whether to generate an audit message when a user attempts an action and is denied access to the secured object or feature because of insufficient security permissions.  
**Default**: Disabled  
To record audit messages when users fail to access objects because of insufficient security permissions, set this policy to **Enabled**. If enabled, audit information is sent to FactoryTalk Diagnostics. |
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Audit security access successes

Determines whether to generate an audit message when a user attempts an action and is granted access to the secured object or feature because the user has the required security permissions.

**Default:** Disabled

To record audit messages when users succeed in accessing objects because of sufficient security permissions, set this policy to **Enabled**. When enabled, this policy might generate a large number of audit messages. Enable this policy only if there is a specific reason for doing so, for example, testing or troubleshooting whether users can access particular features or objects in the system. If enabled, audit information is sent to FactoryTalk Diagnostics.

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See also

- [Set audit policies](#) on page 88
- [Audit trails and regulatory compliance](#) on page 36
- [Audit policies](#) on page 89

**Monitor security-related events**

Monitor security-related events to find out if changes are made to security policies or other objects, who made the changes, and when they were made. Monitor security-related events by setting up audit policies.

In a FactoryTalk automation system, Rockwell Automation software products monitor system activity and generate detailed diagnostic messages. Meanwhile, FactoryTalk Diagnostics collects these activity, warning, error, and audit messages from all participating products throughout a distributed system and routes them to Local Logs on each computer. Depending on the products installed and the configuration options set, FactoryTalk Diagnostics can also route these messages to other centralized logging destinations, such as an ODBC database or FactoryTalk® AssetCentre Audit Log.

![Diagram of FactoryTalk Diagnostics and Logging Options]

To configure FactoryTalk Diagnostics routing and logging options, select **FactoryTalk Diagnostics Setup** from the **Tools** menu on each computer where the FactoryTalk Administration Console is installed.

To view diagnostic messages, from the **Tools** menu select **FactoryTalk Diagnostics > Viewer**.
See also

Set audit policies on page 88

Example: Audit messages

If the setting Audit changes to configuration and control system is enabled in Audit Policy, audit messages are generated when any configuration and control system changes occur across the FactoryTalk system.

Examples of messages for adding and removing control system components:

- Added area [Line2] to application [Network/Paper Mill]
- Removed area [Line1b] from application [Network/PaperMill]
- Added graphic display [Overview] to area [Network/Paper Mill/Line2]
- Removed user [BBilly] from directory [Network/System]
- Downloaded project [PASTEURIZE] to processor [/NetworkPath/Line1]
- Inserted rung [XIC B3/0 OTE B3/0] in processor [XYZ/File 2/Rung 10]

Examples of messages for modifying control system values:

- Modified properties of user [JSmith] in directory [Network/System]
- Modified properties of server [Line2HMI] in application [Network/Paper Mill]
- Changed value of tag [HighPressureLimit] in processor [TABLET10] from [100] to [125]
- Changed value of tag [MaxFeederSpeed] in area [Network/Paper Mill/Line1] from [200] to [300]
- Changed name of graphic display [Line1Overview] in area [Network/Paper Mill/Line2] from [Line1Overview] to [Line2Overview]

See also

Audit policies on page 89

Set system security policies

Use Security Policy Properties to define general rules for implementing security across all FactoryTalk products in the system.

- **Account Policy Settings**: Specify how FactoryTalk manages policies for user, computer, and group accounts.
Chapter 9
Set system policies

- **Computer Policy Settings**: Specify how computer accounts in the FactoryTalk network directory can use remote access.

- **Directory Protection Policy Settings**: Specifies client computer accounts usage of the FactoryTalk network directory.

- **Password Policy Settings**: Configures password requirements for FactoryTalk user accounts.

- **Single Sign-On Policy Settings**: Controls whether users can log on once to the FactoryTalk system, or must log on to each FactoryTalk product separately.

See also

- [Modify Account Policy Settings](page 94)
- [Modify Computer Policy Settings](page 96)
- [Modify Directory Protection Policy Settings](page 97)
- [Modify Password Policy Settings](page 98)
- [Enable single sign-on](page 100)

**Modify Account Policy Settings**

Use **Account Policy Settings** to change these security policy properties:

- Logon session lease
- Account lockout threshold
- Account lockout auto reset
- Keep record of deleted accounts
- Show deleted accounts in user list

**To modify Account Policy Settings**

1. In FactoryTalk Administration Console Explorer, expand System > Policies > System Policies.

2. Right-click Security Policy and select Properties.


4. To set the maximum number of hours that a user can remain logged on before the system checks whether the user’s account is still valid, select **Logon session lease**, and type a value from 0-999. Setting this value
to 0 allows the logon session to be used indefinitely, allowing users to have continuous access, even if their accounts are disabled or deleted.

5. To set the number of consecutive times a user can unsuccessfully attempt to log on before the account is locked, double-click **Account lockout threshold**, and type a value from 0-999. If set to 0, accounts are never locked no matter how many consecutive times a user attempts to log on. An invalid logon attempt occurs if the user attempts to log on and specifies a correct user name but an incorrect password.

A locked account cannot be used until the **Account lockout auto reset** period expires, or until the account is reset by a FactoryTalk administrator. This helps prevent an unauthorized user from gaining access to the system by guessing a password through a process of elimination.

6. To specify the amount of time that must expire before a locked account is reset and the user can attempt access again, select **Account lockout auto reset** and type a value between 0 and 999 minutes.

7. To determine if the system maintains a record of deleted user accounts, select **Keep record of deleted accounts**, and select one:
   - **Enabled**—Accounts are permanently disabled, but remain flagged in the system with a unique identifier. New accounts must have unique names. For security, audit tracking, and compliance requirements, it may be necessary to keep a record of deleted accounts.
   - **Disabled**—Accounts are fully deleted from the system, allowing new accounts to use the same name. However, the new accounts have different account identifiers and do not inherit the security settings of the account.

8. If deleted account records are kept, choose whether or not to list deleted account records in the **Users** folder in the **System** tree. Select **Show deleted accounts in user list**, and select one:
   - **Enabled**—Administrators can view details about these deleted user accounts
   - **Disabled**—Deleted accounts are not shown in the list of user accounts

9. When finished modifying Account Policy Settings, select **OK**.

See also

- **Account Policy Settings** on page 101
- **Audit trails and regulatory compliance** on page 36
Modify Computer Policy Settings

Use **Computer Policy Settings** to change these security policy properties:

- Whether or not a user can connect to the FactoryTalk Directory from a client computer that does not have a computer account in the network directory
- How client computers connect to the FactoryTalk Directory through Remote Desktop Services, and how the computer name appears in the FactoryTalk Diagnostics log of actions.

These settings apply only to computers in the FactoryTalk network directory because the FactoryTalk local directory does not permit remote access.

**To modify Computer Policy Settings**

1. In FactoryTalk Administration Console **Explorer**, expand **System > Policies > System Policies**.

2. Right-click **Security Policy** and select **Properties**.

3. In **Security Policy Properties**, select + to expand **Computer Policy Settings**.

4. To change the requirements for connecting to the FactoryTalk Directory from a computer that does not have a FactoryTalk computer account, select **Require computer accounts for all client machines** and select one:
   - **Enabled**—allows users to log on to FactoryTalk only if they are logging on from a client computer that has an account in the FactoryTalk Directory. Remote Desktop Services clients can still log on to FactoryTalk Directory without computer accounts if the **Identify terminal server clients using the name of** policy is set to **Server Computer**. See step 4.
   - **Disabled**—allows users to log on to FactoryTalk from any client computer, even if that computer has no computer account in the FactoryTalk network directory.

5. To determine what computer name identifies clients connecting to the FactoryTalk Directory through Remote Desktop Services, select **Identify terminal server clients using the name of** and select one:
   - **Terminal client**—Client computers must have computer accounts in the FactoryTalk Directory to access FactoryTalk applications, unless the **Require computer accounts for all client machines** policy is disabled. This combination of settings is useful for diagnostic logging.
because the name of the client computer where actions originate can be logged.

**Terminal Client** logs actions using the name of the client computer where the user is connecting to the Remote Desktop Connection (RDC) client computer. The computer name logged in FactoryTalk Diagnostics is different for each client connecting via Remote Desktop Services.

- **Server computer**—allows client computers to connect through Remote Desktop Services without requiring accounts in the FactoryTalk Directory, even if the **Require computer accounts for all client machines** policy is **Enabled**.

  **Server computer** logs actions using the name of the Remote Desktop Connection server computer. The computer name logged in FactoryTalk Diagnostics will be the same for all users connecting via Remote Desktop Services.

6. When finished modifying Account Policy Settings, select **OK**.

| Important: | If setting the **Identify terminal server clients using the name of** policy to **Server Computer**, disable single sign-on because the computer name is saved as part of the single sign-on user’s credentials, and might affect the level of access a Remote Desktop Services user has to the FactoryTalk system. |

See also

- [Computer Policy Settings on page 103](#)
- [Enable single sign-on on page 100](#)

**Modify Directory Protection Policy Settings**

Use **Directory Protection Policy Settings** to change the security policy properties that determine:

- If computers with FactoryTalk versions less than 2.50, which are considered non-secure, can access a directory server with FactoryTalk CPR 9 SR5 or later, and if so, whether or not an audit message is generated

- How long cache files remain available after a client computer disconnects from the server, and if a warning message displays

These settings apply only to computers in the FactoryTalk network directory.

**To modify Directory Protection Policy Settings**

1. In FactoryTalk Administration Console **Explorer**, expand **System** > **Policies** > **System Policies**.
2. Right-click Security Policy and select Properties.


4. By default, FactoryTalk allows client computers with FactoryTalk versions earlier than 2.50 to connect to and retrieve information from a directory server computer with FactoryTalk 2.50 or later. To change this policy, change the Support non-secure clients setting to Deny. Clients with FactoryTalk versions earlier than 2.50 are denied access and a Protocol version mismatch error occurs.

5. By default, an audit message is created when a client computer with a FactoryTalk version earlier than 2.50 connects to a directory server computer with FactoryTalk 2.50 or later. If the message should not be created, change the Audit non-secure client connections setting to Disabled.

6. By default, cache files never expire. Instead, the cache files remain available after the client computer is disconnected from the server. To set a time limit for when cache files should expire, change the Directory cache expiration setting by typing or selecting a number of hours between 1 and 9999. When the time limit is reached, the client computer must reconnect to the server to continue to access the files.

7. By default, no warnings appear prior to cache expiration, but notifications can appear upon disconnection and cache expiration. To enable cache expiration warnings, change the Directory cache expiration warning setting by typing a number between 1 and 24. A warning notification appears this number of hours before cache expiration.

8. When finished modifying directory protection policy settings, select OK.

**Important:** If setting the Identify terminal server clients using the name of policy to Server Computer, disable single sign-on because the computer name is saved as part of the single sign-on user’s credentials, and might affect the level of access a Remote Desktop Services user has to the FactoryTalk system.

See also

- Computer Policy Settings on page 103
- Enable single sign-on on page 100

**Modify Password Policy Settings**

Use Password Policy Settings to set security policy properties that control the conditions for a valid FactoryTalk password, such as minimum and maximum password length, password encryption method, password complexity requirements, and when a password expiration warning is given.
These policies do not apply to Windows-linked user accounts. Backing up the FactoryTalk system folder before making changes to Password Policy Settings is recommended.

To modify Password Policy Settings

1. In FactoryTalk Administration Console Explorer, expand System > Policies > System Policies.

2. Right-click Security Policy and select Properties.


4. In Password encryption method select the down arrow and select SHA-256 or MD5.

Changing the password encryption method invalidates current user passwords.

**Important:** Previous releases used the MD5 cryptographic hashing algorithm to encode passwords. MD5 is an older algorithm that has known security vulnerabilities. Using the SHA-256 encryption method is recommended.

5. Select Passwords must meet complexity requirements and select Enabled to require users to create more secure passwords. By default, FactoryTalk allows user passwords to contain any characters or combinations of characters. The complexity requirements are defined by the system and cannot be changed.

6. Select Minimum password length and type a number between 0 and 16 to define the number of character required in a user password. Set Minimum password length to 0 to create user accounts without passwords.

**Tip:** If Passwords must meet complexity requirements is set to Enabled, the minimum password length is 6 characters and is not affected by the Minimum password length setting.

7. Select Previous passwords remembered and type a number between 1 and 24 to prevent users from keeping the same password indefinitely. By default, three new passwords must be created before reusing an old password. If Previous passwords remembered is set to 0, old passwords can be reused immediately.

8. Select Minimum password age and type a number between 1 and 999 to require users to wait at least one day before changing their password.
9. Select **Maximum password age** and type a number between 1 and 999 to set the maximum number of days before passwords expire. When set to 0, passwords never expire.

10. Select **Password expiration warning** and enter a value between 0 and 999 to change the number of days before the system begins prompting users to change their passwords. By default, users receive a warning 14 days before their passwords expire.

11. Select **OK** or **Apply** to apply the new settings.

12. If the password encryption method was changed, choose how to process the change on all of the current FactoryTalk user accounts.

   - Select **Disable all FactoryTalk user accounts** to review each user account and select unique passwords for each.
   - Select **Reset all FactoryTalk user passwords immediately** to set a new password on all user accounts and require users to specify a new password the next time they logon.

   This option updates these **Users** policy settings:

<table>
<thead>
<tr>
<th>Policy</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>User must change password at next logon</td>
<td>Enabled</td>
</tr>
<tr>
<td>User cannot change password</td>
<td>Disabled</td>
</tr>
<tr>
<td>Password never expires</td>
<td>Disabled</td>
</tr>
</tbody>
</table>

See also

- [Password Policy Settings](#) on page 107
- [Add a FactoryTalk user account](#) on page 43
- [Back up a System folder](#) on page 166

### Enable single sign-on

Use **Single Sign-On Policy Settings** to configure security policy properties to enable single sign-on capability. When single sign-on is enabled, only one log on, per directory, on a given computer is allowed. Once logged on, all participating FactoryTalk products that run in that directory on that computer automatically use those same security credentials.

To enable single sign-on

1. In FactoryTalk Administration Console **Explorer**, expand **System > Policies > System Policies**.

2. Right-click **Security Policy** and select **Properties**.

4. To the right of Use single sign-on, select the down arrow.

5. Choose Enabled, then select OK.

If single sign-on still does not seem to be working properly, the FactoryTalk product in use may not support the single sign-on capability. Some FactoryTalk products always require users to log on, even if single sign-on is enabled.

See also

Disable single sign-on on page 101

Security Policy Properties on page 111

Disable single sign-on

To require users to log into each FactoryTalk product separately, configure Single Sign-On Policy Settings to disable single sign-on capability.

To disable single sign-on

1. In FactoryTalk Administration Console Explorer, expand System > Policies > System Policies.

2. Right-click Security Policy and select Properties.


4. To the right of Use single sign-on, select the down arrow.

5. Choose Disabled, then select OK.

See also

Enable single sign-on on page 100

Account Policy Settings

Use Account Policy Settings to specify how FactoryTalk manages policies for user, computer, and group accounts. Additional policy settings for computer accounts are managed in Computer Policy Settings.
### Logon session lease

Sets the maximum number of hours that a user can remain logged on before the system checks whether the user’s account is still valid. Use this setting to prevent logged on users from retaining access indefinitely, even after their accounts are disabled or deleted.

For example, if a user’s account is disabled or its password changed, and the account name and password cannot be reauthenticated, the logon session becomes invalid. The user can no longer access secure system resources until the user logs on successfully again.

Setting this value to 0 allows the logon session to be used indefinitely, allowing users to have continuous access, and preventing the system from automatically reauthenticating users. This means that the system does not check whether the user’s account is still valid.

**Minimum:** 0 hours  
**Maximum:** 999 hours  
**Default:** 1 hour

### Account lockout threshold

Sets the number of consecutive times a user can unsuccessfully attempt to log on before the account is locked. If set to 0, accounts are never locked.

An invalid logon attempt occurs if the user attempts to log on and specifies a correct user name but an incorrect password.

A locked account cannot be used until the Account lockout auto reset period expires, or until the account is reset by a FactoryTalk administrator. This helps prevent an unauthorized user from gaining access to the system by guessing a password using a process of elimination.

**Minimum:** 0 invalid logon attempts  
**Maximum:** 999 invalid logon attempts  
**Defaults:**  
- For the Network Directory, 3 invalid logon attempts.  
- For the Local Directory, 0 invalid logon attempts.

### Account lockout auto reset

Specifies the amount of time that must expire before a locked account is reset, allowing the user to attempt access again. Type a value between 0 and 999 minutes to specify the amount of time a user must wait before using the account again to gain access to the system.

If set to 0, locked accounts are not reset automatically. A FactoryTalk administrator and must unlock the account manually.

**Minimum:** 0 minutes  
**Maximum:** 999 minutes  
**Default:** 15 minutes

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logon session lease</td>
<td>Sets the maximum number of hours that a user can remain logged on before the system checks whether the user’s account is still valid. Use this setting to prevent logged on users from retaining access indefinitely, even after their accounts are disabled or deleted. For example, if a user’s account is disabled or its password changed, and the account name and password cannot be reauthenticated, the logon session becomes invalid. The user can no longer access secure system resources until the user logs on successfully again. Setting this value to 0 allows the logon session to be used indefinitely, allowing users to have continuous access, and preventing the system from automatically reauthenticating users. This means that the system does not check whether the user’s account is still valid. <strong>Minimum:</strong> 0 hours  <strong>Maximum:</strong> 999 hours  <strong>Default:</strong> 1 hour</td>
</tr>
</tbody>
</table>
| Account lockout threshold       | Sets the number of consecutive times a user can unsuccessfully attempt to log on before the account is locked. If set to 0, accounts are never locked. An invalid logon attempt occurs if the user attempts to log on and specifies a correct user name but an incorrect password. A locked account cannot be used until the Account lockout auto reset period expires, or until the account is reset by a FactoryTalk administrator. This helps prevent an unauthorized user from gaining access to the system by guessing a password using a process of elimination. **Minimum:** 0 invalid logon attempts  **Maximum:** 999 invalid logon attempts  **Defaults:**  
- For the Network Directory, 3 invalid logon attempts.  
- For the Local Directory, 0 invalid logon attempts. |
| Account lockout auto reset      | Specifies the amount of time that must expire before a locked account is reset, allowing the user to attempt access again. Type a value between 0 and 999 minutes to specify the amount of time a user must wait before using the account again to gain access to the system. If set to 0, locked accounts are not reset automatically. A FactoryTalk administrator and must unlock the account manually. **Minimum:** 0 minutes  **Maximum:** 999 minutes  **Default:** 15 minutes |
Keep record of deleted accounts

Determines whether user accounts can be permanently deleted with no record retained in the system, or flagged as deleted and be permanently disabled, with a record of the deleted account retained in the system.

To keep a record of accounts that were deleted, and force all new accounts to be unique, select **Enabled**. Also, change a policy setting to show deleted accounts in the list of users.

To discard accounts when they are deleted, select **Disabled**. This means that if a user account is deleted, a user account can be recreated again later with the same user name. If the policy is enabled and a user account is deleted, a user account cannot be recreated again later with the same user name, because its record still exists in the system.

If the policy is disabled and user account with the same name is recreated, the new user account does not inherit the security settings of the old account. The reason is that all user accounts are identified by means of a unique identifier that is separate from the user name. When deleting a user account, the user’s access rights are deleted, but the user account’s unique identifier is not deleted.

When creating another user account with the same name, recreate the security settings of the account. Either add the user account to a group that already has security settings defined, or create permissions for a user account when securing a resource.

For security and audit tracking reasons, and to satisfy compliance requirements in regulated manufacturing industries, it might be necessary to:

- Keep a record of previously deleted accounts
- Ensure that all user accounts can be uniquely identified in the system

**Default:** Disabled

Show deleted accounts in list

Sets whether deleted account records are listed in the Users folder in the System tree. This policy works together with the Keep record of deleted accounts policy. If Keep record of deleted accounts is enabled, enabling Show deleted accounts in user list allows a FactoryTalk administrator to view details about accounts that were deleted.

To hide deleted accounts in the list of users, select **Disabled**. This means that accounts that are deleted are not shown in the list of user accounts, even if keeping a record of deleted accounts. Enable the Show deleted accounts in user list policy to keep a record of deleted accounts (for example, for regulatory compliance), and to view details about accounts that were deleted.

**Default:** Disabled

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**See also**

- Modify Account Policy Settings on page 94
- Audit trails and regulatory compliance on page 36
- Security Policy Properties on page 111

**Computer Policy Settings**

Computer Policy Settings control how computer accounts can access the FactoryTalk Directory remotely. These settings apply only to computer accounts in the FactoryTalk network directory because the FactoryTalk local directory does not permit remote access.
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<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Require computer accounts for all client machines</td>
<td>Determines whether client computers can access the FactoryTalk network directory without having a computer account in the network directory. Disable this policy to allow users to connect remotely from any computer, even if the computer does not have a computer account in the FactoryTalk Directory. Even when this setting is disabled, create computer accounts for any computers hosting servers — for example, Rockwell Automation Device Servers (FactoryTalk Linx, OPC data servers, Tag Alarm and Event Servers, or HMI servers). Without the server computer accounts, configuring the servers from client computers on the network is not possible. The FactoryTalk network directory Server cannot locate these servers on the network without their computer accounts. <strong>Enabled</strong> allows users to log on to FactoryTalk only if they are logging on from a client computer that has an account in the FactoryTalk Directory. Even if set to Enabled, Remote Desktop Services clients can still log on to FactoryTalk Directory without computer accounts if the Identify terminal server clients using the name of policy is set to <strong>Server Computer</strong>. <strong>Disabled</strong> allows users to log on to FactoryTalk from any client computer, even if that computer has no computer account in the FactoryTalk network directory. <strong>Default</strong>: Enabled</td>
</tr>
</tbody>
</table>

| Identify terminal server clients using the name of | Determines what computer name identifies clients connecting to the FactoryTalk Directory through Remote Desktop Services. This policy also affects whether client computers connecting through Remote Desktop Services require computer accounts in the FactoryTalk Directory. **Server Computer** allows client computers to connect through Remote Desktop Services without requiring accounts in the FactoryTalk Directory, even if the **Require computer accounts for all client machines** policy is **Enabled**. This is possible because the FactoryTalk Directory behaves as if the client computer were accessing the FactoryTalk Directory from the Remote Desktop Connection computer. If set to **Terminal Client** and the **Require computer accounts for all client machines** policy is **Enabled**, client computers must have computer accounts in the FactoryTalk Directory to access FactoryTalk applications. If set to **Terminal Client** and the **Require computer accounts for all client machines** policy is **Disabled**, client computers do not require computer accounts in the FactoryTalk Directory to access FactoryTalk applications. This combination of settings is useful for diagnostic logging because the name of the client computer where actions originate can be logged. The **Identify terminal server clients using the name of** policy also determines which computer name appears in the FactoryTalk Diagnostics Log of actions performed on the system over a Remote Desktop Services connection: **Terminal Client** logs actions using the name of the client computer where the user is connecting to the Terminal Server. The computer name logged in FactoryTalk Diagnostics will be different for each client connecting via Remote Desktop Services. **Server Computer** logs actions using the name of the Terminal Server computer for all users. The computer name logged in FactoryTalk Diagnostics will be the same for all users connecting via Remote Desktop Services. **Default**: Terminal Client |
Important: If setting the Identify terminal server clients using the name of policy to Server Computer, disable single sign-on because the computer name is saved as part of the single sign-on user’s credentials, and might affect the level of access a Remote Desktop Services user has to the FactoryTalk system.

See also

Modify Computer Policy Settings on page 96

Security Policy Properties on page 111

The Directory Protection Policy Settings specify client computer accounts usage of the FactoryTalk network directory.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support non-secure clients</td>
<td>Determines whether client computers with FactoryTalk versions earlier than 2.50 can access a directory server computer with FactoryTalk CPR 9 SR5 or later. The policy is ignored if client computers are installed with FactoryTalk 2.50 or later. Allow means client computers with FactoryTalk versions earlier than 2.50 can connect to and retrieve information from a directory server computer with FactoryTalk 2.50 or later. Deny means only client computers with FactoryTalk 2.50 can connect to and retrieve information from a directory server computer with FactoryTalk 2.50 or later. Clients with FactoryTalk versions earlier than 2.50 are denied access and a Protocol version mismatch error occurs. Default: Allow Disconnect the directory server from the network before changing this policy. Reconnect to the network after applying the change. Otherwise, this policy is not properly enforced.</td>
</tr>
<tr>
<td>Audit non-secure client connections</td>
<td>Determines whether an audit message is created when client computers with FactoryTalk versions earlier than 2.50 connect to a directory server computer with FactoryTalk 2.50 or later. Enabled means an audit message is created when a client computer with a FactoryTalk version earlier than 2.50 connects to a directory server computer with FactoryTalk 2.50 or later. Disabled means an audit message is not created when a client computer with a FactoryTalk version earlier than 2.50 connects to a directory server computer with FactoryTalk 2.50 or later. Default: Enabled</td>
</tr>
<tr>
<td>Directory cache expiration</td>
<td>Determines how long the cache files remain available after the client computer is disconnected from the server. Once this time elapses, reconnect to the directory server to access the latest data files. If set to 0, cache files never expire. Minimum: 0 hours Maximum: 9999 hours Default: 0 hours</td>
</tr>
</tbody>
</table>
Set system policies

Directory cache expiration warning

Determines when a warning notification displays in the notification area prior to the directory cache expiring. Select FactoryTalk Directory in the notification area to quickly view the time expiration information.

If set to 0, warnings do not appear prior to cache expiration. However, notifications can be seen upon disconnection and cache expiration.

**Minimum:** 0 hours

**Maximum:** 24 hours

**Default:** 0 hours before expiration

See also

- [Modify Directory Protection Policy Settings](#) on page 97

- [Cache expiration policies](#) on page 106

### Cache expiration policies

In FactoryTalk, rules for directory cache expiration are managed system-wide by the [Directory Protection Policy Settings](#) security policy properties. These policies determine:

- How long cache files remain available after the client computer disconnects from the server
- If a warning displays before the directory cache expires

Directory cache expiration policies for a specific computer or group of computers can be customized. For example, to allow a group of laptop computers to operate without a network connection for a longer time period, and for the cache to never expire for one of the laptops. To override the FactoryTalk network directory cache expiration policies, set directory cache timeout policies for a computer group or an individual computer.

The directory cache timeout policies cannot be modified in a FactoryTalk local directory.

**Tip:** The directory cache timeout policies are not supported if the client computer is installed with FactoryTalk Services Platform version 2.40 or earlier.

The cache expiration policies in FactoryTalk are applied in this order of precedence:

- By default, all computers in the directory adopt the directory cache expiration policy.
- Computer group cache expiration policies take precedence over the directory cache expiration policy. If a computer is assigned to multiple computer groups, the computer adopts the cache expiration of the first assigned computer group in alphabetical order.
- Computer cache expiration policies take precedence over the directory cache expiration policies of any of its computer groups.
This example shows how the cache expiration policies work.

Suppose that:

- Three computers connected to the FactoryTalk network directory server. MYLAPTOP is a member of computer group Laptops. MYWORKSTATION is a member of computer group Workstations.

The current setting covers the majority of your computers. Optionally, customize specific settings for some cases. For example, to allow computers of Laptops to operate in a disconnected state for a longer period (for example, 7 days, that is, 168 hours). Also, turn off the cache expiration functionality for computer MYSERVER.

To achieve these results,

- In the computer group policy setting of Laptops, select to override the directory cache expiration policy and set the computer group cache expiration value to 168.
- In the computer policy setting of MYSERVER, select to override the directory cache expiration policy and set the computer cache expiration value to 0.

See also

Modify Directory Protection Policy Settings on page 97

FactoryTalk Security on page 29

Password Policy Settings

For FactoryTalk user accounts, use Password Policy Settings to configure these security property settings:

- Password encryption method
- Password complexity
- Minimum password length
- Number of previous passwords remembered
- Minimum password age
- Maximum password age
- Password expiration warning

Passwords for FactoryTalk user accounts can be up to 16 characters long. A set of password policies determines the length and complexity of passwords. As a matter of good security practice, do not use blank passwords with accounts.

To help avoid intermittent security failures or an inability to log on, always use a password for all Windows-linked accounts. If not using a password for Windows-linked accounts, on the local computer disable the Windows local security policy **Accounts: Limit local account use of blank passwords to console logon only**. Define password policies for Windows-linked accounts in Windows.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password encryption method</td>
<td>Determines how the password is encrypted when stored in the FactoryTalk Directory.</td>
</tr>
</tbody>
</table>
|                                  | - **MD5** - A 128-bit hash algorithm that is used with previous versions of FactoryTalk Services Platform. Retained for backwards compatibility, but has known security vulnerabilities.  
  - **SHA-256** - A 256-bit hash algorithm that meets modern security requirements. Where possible, transitioning systems to use SHA-256 password encryption method is strongly recommended. |
| Passwords must meet complexity requirements | Determines how simple or complex passwords must be.  
**Disabled** means that passwords to user accounts can include any characters or combinations of characters.  
**Enabled** requires users to create passwords that are more secure, because passwords used for user accounts:  
- Cannot contain all of the user account name. For example, a user account named John12 cannot have the password John1234. However, the password 12John is permitted. This check is case sensitive so John12 could have the password J0HN12.  
- Must contain at least six characters (change the minimum value using the Minimum password length policy)  
- Must contain characters from three of these four categories:  
  - Unaccented uppercase characters (A to Z)  
  - Unaccented lowercase characters (a to z)  
  - Numerals (0 to 9)  
  - Non-alphanumeric characters (!, @, #, %) |

If enabled, any passwords that do not meet these minimum requirements are rejected, and the user is prompted to create a password that satisfies the criteria. These complexity requirements are defined by the system and cannot change.

The **Passwords must meet complexity requirements** policy overrides the **Minimum password length** policy if the minimum password length is less than six characters. If the minimum password length is greater than six characters, **Minimum password length** takes precedence.  
**Default**: Disabled.
### Minimum password length

Sets the minimum number of characters a user account password must contain. A value of 0 allows you to create user accounts without passwords. If enabled, the **Passwords must meet complexity requirements** policy requires a minimum password length of six characters. However, if the **Minimum password length** policy is set to more than six characters, this overrides the **Passwords must meet complexity requirements** policy.

**Minimum:** 0 characters. A value of 0 means that you can create user accounts without passwords.

**Maximum:** 16 characters

**Defaults:**
- For the network directory, **six characters**.
- For the local directory, **0 characters**. This means that users can set the passwords to their accounts to be blank.

### Previous passwords remembered

Sets the number of unique new passwords that must be created before reusing an old password. If set to 0, old passwords can be reused immediately. This policy ensures that old passwords are not continually reused.

To maintain the effectiveness of the **Previous passwords remembered** policy, set the **Minimum password age** policy to a non-zero value to prevent passwords from being changed immediately. This policy is also necessary to make the **Maximum password age** policy meaningful. If this policy is set to zero, users can immediately re-use their existing passwords when their passwords expire.

**Minimum:** 0 passwords

**Maximum:** 24 passwords

**Default:** 3 passwords

### Minimum password age

Sets the minimum number of days passwords must be in effect before they can change. If set to 0, users can change their passwords immediately following a prior change.

This policy works together with the **Previous passwords remembered** policy to prevent a user from changing a password repeatedly until one of the user’s old password favorites can be used again.

If the value of the **Minimum password age** is greater than the value of the **Maximum password age**, the minimum password age is ignored.

- **Minimum:** 0 days
- **Maximum:** 999 days
- **Default:** 0 days. This means that users can change their passwords at any time.

### Maximum password age

Sets the maximum number of days passwords can be used before they must change. If set to 0, passwords never expire. When setting this value, be sure also to specify a smaller value for the **Password expiration warning**.

If the **Maximum password age** expires, the user is prompted to change the password when next logging on with the account.

If the value of the **Maximum password age** policy is less than the value of the **Minimum password age** policy, the minimum password age is ignored.

- **Minimum:** 0 days
- **Maximum:** 999 days
- **Default:** 0 days. This means that users are never prompted to change their passwords.
### Password expiration warning

Sets the number of days before passwords are due to expire that the system begins prompting users to change their passwords.

- **If Maximum password age** is set to 0, the password expiration warning never appears.
- If the value of the **Password expiration warning** is greater than the value of the **Maximum password age**, a password expiration warning appears the next time the user attempts to log on.

- **Minimum**: 0 days before expiration
- **Maximum**: 999 days before expiration
- **Default**: 14 days before expiration

### See also

- [Add a FactoryTalk user account](#) on page 43
- [Add a Windows-linked user account](#) on page 45
- [Security Policy Properties](#) on page 111

#### Single Sign-On Policy Settings

Use **Single Sign-On Policy Settings** in **Security Policy Properties** to set whether users can log on once to the FactoryTalk system, or must log on to each FactoryTalk product separately.

Disable single sign-on if users will be connecting through Remote Desktop Services using the name of the Remote Desktop Connection server computer. This is determined through the computer policy setting **Identify terminal server clients using the name of**. The computer name is saved as part of the single sign-on user's credentials, and might affect the level of access a user has to the FactoryTalk system.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enabled</td>
<td>Requires users to log on to the FactoryTalk system only once. The system checks the user's access rights as the user performs actions after logging on. If the user has the required access rights, the action is allowed to proceed. If the user does not have the required access rights, the action is prevented from taking place. The user is not prompted repeatedly to log on with a user name and password.</td>
</tr>
<tr>
<td>Disabled</td>
<td>Requires users to log on to each FactoryTalk product separately.</td>
</tr>
</tbody>
</table>

### See also

- [When to disable single sign-on](#) on page 110
- [Modify Computer Policy Settings](#) on page 96
- [Security Policy Properties](#) on page 111

#### When to disable single sign-on

If multiple users are sharing the same Windows user account, but have different FactoryTalk user accounts, it might be necessary to disable single sign-on. This is because with single sign-on enabled, the last user that logged on to FactoryTalk is
automatically logged on to all subsequent FactoryTalk products. If the ability to distinguish the actions of individual users is necessary, disable single sign-on to force all users to identify themselves to each FactoryTalk product they use.

There is no way to log all users off all FactoryTalk products simultaneously. This is because some products might need to run without interruption in the background. To log all users off all FactoryTalk products simultaneously, log off Windows. Logging off Windows also shuts down all FactoryTalk products that were started in the Windows session, regardless of how many users were logged on.

Also disable single sign-on when logging on to FactoryTalk through Remote Desktop Services using the name of the Remote Desktop Connection server computer. Alternatively, change the security policy Identify terminal server clients using the name of to allow Remote Desktop Services users to connect using the name of the Remote Desktop Connection client computer.

If single sign-on still does not seem to be working properly, the FactoryTalk product in use may not support the single sign-on capability. Some FactoryTalk products always require users to log on, even if single sign-on is enabled.

See also

Enable single sign-on on page 100

Security Policy Properties on page 111

Security Policy Properties

How do I open Security Policy Properties?

1. Start FactoryTalk Administration Console or FactoryTalk View Studio and then log on to the FactoryTalk Network Directory or FactoryTalk Local Directory where you want to modify security policies.

2. In the Explorer window, expand the System > Policies > System Policies folders.


Use Security Policy Properties to define general rules for implementing security across all FactoryTalk products in the system. To modify security policies, obtain the appropriate permissions for the System Policies folder in the Explorer.

- Account Policy Settings: Specify how FactoryTalk manages policies for user, computer, and group accounts.
- Computer Policy Settings: Specify how computer accounts in the FactoryTalk network directory can use remote access.
• **Directory Protection Policy Settings**: Specifies client computer accounts usage of the FactoryTalk network directory.

• **Password Policy Settings**: Configures password requirements for FactoryTalk user accounts.

• **Single Sign-On Policy Settings**: Controls whether users can log on once to the FactoryTalk system, or must log on to each FactoryTalk product separately.

**See also**

- Modify Account Policy Settings on page 94
- Modify Computer Policy Settings on page 96
- Modify Directory Protection Policy Settings on page 97
- Modify Password Policy Settings on page 98
- Navigate the Policy Properties windows on page 112

### Navigate the Policy Properties windows

All **Product Policies** and **System Policies** windows contain the same features to navigate to the property setting.

**To navigate the Policy Properties windows**

- To sort the policy settings alphabetically, select **Alphabetic**.
- To sort the policy settings by category, select **Categories**.
- To expand or collapse the list of policy settings in a category, select the arrow next to the category name.
- To change a setting, select the setting, then choose or type a new value.
- To change the size of any column, move the cursor over a column heading until a cross-bar shape appears, then select and drag to expand or reduce the column size.
- To resize the description of a selected setting, drag the top part of the description pane at the bottom of the window.

**See also**

- Assign user rights to make system policy changes on page 79
- Set audit policies on page 88
- Security Policy Properties on page 111
Export policies to XML

Export policies to save current FactoryTalk Directory policy settings to an XML file. Use an XML or text comparison tool to determine policy changes between exported policy files.

The exported policies are limited to the policies accessible by the logged on user. If the logged-on user does not have Read, Execute, or List Children permissions for a policy or its parent folders, that policy is not exported.

**Prerequisites**

Obtain permissions for each policy to be exported:

- Common > Read
- Common > Execute
- Common > List Children

**To export policies to XML**

1. From the Tools menu, select Export Policies.
2. Enter or browse to a path for the XML file.
3. Select Export.

**See also**

Export Policies

Set system security policies on page 93
Set product-specific policies

To prevent users of a FactoryTalk product from making unwanted changes, restrict user access to individual product features. Only users with the required level of access can use the product features once secured.

Example: Configure product policies for RSLinx Classic, to restrict the ability to shut down the RSLinx Classic service to only the group *Network admins*, to prevent system operators from inadvertently shutting down RSLinx Classic during run time.

A product policy is a collection of securable features in a FactoryTalk product. A product policy applies to only one product—if a user account is denied access to a product feature, that feature cannot be used when using that product, but the feature can still be used in other FactoryTalk products if the feature was not secured in that product.

To view and edit permissions:

- For features of a single product. In *Explorer*, expand **System > Policies > Product Policies**. Expand the folder for the product, right-click **Feature Security** and then select **Properties**. **Feature Security Properties** opens. The configurable permissions are listed under *Category*. Select **Configure Security** next to the category of permissions being edited and then choose the users or groups that will be allowed or denied access to the feature.

- For features of multiple products. In *Explorer*, expand **System > Policies**. Right-click **Product Policies** and select **Configure Feature Security** to open **Feature Security for Product Policies**. Then select to allow or deny permissions as needed for the products in the FactoryTalk Directory.

See also

- Secure features of a single product on page 116
- Secure multiple product features on page 116
- Differences between securable actions and product features on page 119
Secure features of a single product

To restrict access to one or more features of a single FactoryTalk property, use Feature Security Properties.

To secure features of a single product

1. Log on to the FactoryTalk Directory.

2. In FactoryTalk Administration Console Explorer, expand System > Policies > Product Policies.

3. In the Product Policies folder, expand the folder for the product.


5. In Feature Security Properties, select the row containing the feature. A description of the feature appears at the bottom of the window.

6. Configure the security settings for the feature:

   - If the product policy contains settings that are configured using lists, configure the settings, select OK, and skip the rest of the steps.
   - If the product policy is not configured using lists, in the column on the right, select Browse (...) beside Configure Security.

7. Use Configure Securable Action to select the users or user groups that have permission to access the feature, and select OK.

8. Repeat steps 4-6 as needed to configure the features that make up the product policy.

9. Select OK.

See also

Feature Security for Product Policies on page 118

Permissions on page 138

Secure multiple product features

Use Feature Security for Product Policies to secure features of multiple FactoryTalk products at once. The term action in Feature Security for Product Policies refers to a product feature. Each FactoryTalk product installed provides different securable features (actions).

Select plus (+) next to each FactoryTalk product to view the features to secure.

To secure multiple product features

1. Log on to the FactoryTalk Directory.
2. In FactoryTalk Administration Console **Explorer**, expand **System > Policies**.

3. Right-click **Product Policies**, and select **Configure Feature Security**.

4. (optional) To add a user and computer to the **Users** list, select **Add**. In **Select User and Computer**, select a user or group of users, and a computer or group of computers, and select **OK**.

5. In **Feature Security for Product Policies**, either:
   - Select **User** to specify which features a selected user can perform.
   - Select **Action** to specify which users can access a selected feature. Skip to step 7.

6. To set permissions by user:
   - In the **Users** list, select the user or user group to secure their access.
   - In the **Actions** list, expand the list of products and categories as needed to locate the feature to secure, and select the feature. Skip to step 8.

7. To set permissions by feature:
   - In the **Actions** list, expand the list of products and categories to locate the feature to secure, and select the feature.
   - In the **Users** list, select the user or group whose access to the feature is being secured.

8. Specify security settings, either:
   - Select **Allow** to allow a user to perform the action.
   - Select **Deny** to deny a user access to the action.

   If both **Allow** and **Deny** are cleared, the user is denied access to the feature.

9. Repeat steps 5–8 as needed to secure additional product features.

10. Select **OK**.

**See also**

- Secure features of a single product on page 116
- Permissions on page 138
- Differences between securable actions and product policies on page 119
How do I open Feature Security for Product Policies?

1. Start FactoryTalk Administration Console or FactoryTalk View Studio and then log on to the FactoryTalk Directory where you want to configure product policies.

2. In the Explorer window, expand the Network or Local FactoryTalk Directory tree, and then expand the folders `System > Policies`.

3. Right-click `Product Policies`, and then click `Configure Feature Security` on the context menu. You can also right-click any of the individual product categories and then click `Configure Feature Security` to configure policies for just that product.

Use the `Permissions` tab in `Feature Security for Product Policies` to secure features in multiple FactoryTalk products at the same time.

**Tip:** Security for FactoryTalk Linx Gateway must be configured one feature at a time.

If using both a local and a network FactoryTalk Directory configure product policies in each directory separately.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
</table>
| View permissions by | View the same set of permissions from two different points of view:  
• by user — Select `User`, select a user and then specify what product features that user can access  
• by action — Select `Action`, select a product feature and then specify which users can perform the feature |
| Add               | Select `Add` to add a user and computer to the list.                                                                                           |
| Remove            | Select `Remove` to remove a user and computer from the list.                                                                                   |
| Action list       | The term action in `Feature Security for Product Policies` refers to a product feature. Each FactoryTalk product installed provides different securable features (actions).  
Select plus (+) next to each FactoryTalk product to view the features to secure. For more information about each product, refer to the product's documentation.  |
| Allow             | Select to allow access to a product feature.                                                                                                   |
| Deny              | Select to deny access to a product feature.                                                                                                   |
| Allow and Deny    | Clear both to deny access to the feature.                                                                                                      |

**See also**

- [Secure multiple product features](#) on page 116
- [Permissions](#) on page 138
- [Things you can secure](#) on page 32
- [Differences between securable actions and product policies](#) on page 119
Feature Security Policies

How do I open Feature Security Properties?

1. Start FactoryTalk Administration Console or FactoryTalk View Studio and then log on to the FactoryTalk Directory where you want to configure product policies.

2. In the Explorer window, expand the System folder > Policies > Product Policies, expand the folder for the product whose policies you want to secure, and then double-click the type of product policies you want to secure for the product.

Use the Policy Settings tab in Feature Security Properties to configure the security policy settings available for a FactoryTalk product. Each FactoryTalk product has a different set of security policy settings that can be configured to allow or deny access to the feature by specific users or groups.

Policy settings are completely separate in the network directory and local directory. Changes made to the policy settings in one directory do not apply to the other directory.

See also

- Secure features of a single product on page 116
- Secure multiple product features on page 116
- Differences between securable actions and product policies on page 119

Differences between securable actions and product policies

A product policy is a collection of securable features in a FactoryTalk product. A product policy is different than a securable action in these ways:

- A securable action applies to all products that use that action in a particular context—such as an application or area.
- A product policy applies to only one product—if denied permission to a product feature, that product feature cannot be used when using that product.

In some cases, there are securable actions and product policies for the same capability. For example, that Logix Designer application has both a securable action and a product policy named Firmware: Update.

- The securable action applies to all products—if denied permission to the Firmware: Update action in an application or area, firmware in the controller from that application or area using any product cannot be updated.
• The product policy applies to only Logix Designer application—if denied permission to **Firmware: Update**, firmware cannot be updated when using Logix Designer application to configure any controller.

Unlike securable actions for resources, product policies do not inherit security settings. When specifying permissions for product policies, clearing both **Allow** and **Deny** does not allow the policy setting to inherit security. Instead, clearing both denies access to the product feature.

For details about securable actions and product policies in a particular FactoryTalk product, see the documentation for the product.

**See also**

- Secure features of a single product on page 116
- Secure multiple product features on page 116
- Secure resources on page 137
Chapter 11

Manage logical names

A logical name is an alias that identifies a control network or device. Use a logical name to provide a shorter or more intuitive name to identify a device, instead of using its network relative path. Logical names also change the way devices inherit security permissions. Control devices with identical logical names share security permissions across different control networks and across different computers, without requiring identical driver names or relying on identical network paths.

Define logical names in FactoryTalk Administration Console before configuring security for RSLogix 5000 controllers. For all other types of control hardware, choose whether to associate security settings with logical names or with network relative paths.

A logical name can be part of a resource grouping assigned to an area or application. If a logical name is assigned to an area, it inherits the security permissions of the area.

See also

- Logical names on page 121
- Add a logical name on page 123
- Add a device to a logical name on page 124
- Assign a control device to a logical name on page 125
- Add a logical name to an area or application on page 126

Logical names

Consider these questions:
<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
</table>
| Why use logical names? | • Control devices with identical logical names share security permissions across different control networks and across different computers, without requiring identical RSLinx Classic driver names or relying on identical network paths.  
• Logical names are required to configure security for RSLogix 5000 controllers.  
• Logical names can be used as aliases for control devices with multiple paths, so that each instance of the device is associated with a single set of security permissions. |
| What happens when a logical name is added? | • After adding a logical name for a control device, the security system automatically uses the security permissions associated with that name, rather than with the device’s network relative path, to determine access permissions.  
• After defining a new logical name, establish security permissions for the control device. Be sure to add an identical logical name for the control device on each computer on the network that has access to the device, if the different computers have different relative paths to the device.  
• If security is configured for a control device identified by a network relative path, and then later a logical name for the device is added, the original security permissions are not lost; they remain associated with the path, but they do not transfer to the logical name. As a result, the original security permissions are no longer accessible, because security now attempts to access the security permissions using the name, not the path.  
• If a control device’s logical name is changed, the original security permissions remain associated with the first logical name. Re-add security permissions for the device, to associate them with the new logical name. |
| What happens when a logical name is deleted? | • When a logical name is deleted, the security system automatically uses the security permissions associated with the device’s network relative path.  
• The logical name and its associated security permissions still exist in the security system after a name is deleted. For example, suppose the name “MyPLC1” is assigned to Device1 on Computer A and Computer B, and each computer has a different relative path to Device1. When a user attempts to perform an action on Device1 from either computer, the security system checks the permissions associated with “MyPLC1.” Now suppose we delete the name “MyPLC1” on Computer A, but leave it assigned on Computer B. If a user attempts to perform an action on Device1 from Computer A, security uses the permissions associated with the Device1’s network relative path. If a user attempts to perform an action on Device1 from Computer B, however, security uses the permissions associated with the logical name “MyPLC1.”  
• Do not delete logical names for RSLogix 5000 controllers. Because RSLogix 5000 controllers do not have network relative paths, deleting a logical name can cause unexpected results. |

See also

Add a logical name on page 123
Delete a logical name on page 123
Add a logical name

Add a logical name to Networks and Devices to create an alias that identifies a control network or a device. Use a logical name to provide a shorter or more intuitive name to identify a device, instead of using its network relative path. Logical names also change the way devices inherit security permissions. Control devices with identical logical names share security permissions across different control networks and across different computers, without requiring identical driver names or relying on identical network paths.

Add logical names in FactoryTalk Administration Console before configuring security for RSLogix 5000 controllers. For all other types of control hardware, choose whether to associate security settings with logical names or with network relative paths.

Logical names can be added and configured in advance of creating areas or applications.

To add a logical name

1. In FactoryTalk Administration Console Explorer, expand Networks and Devices until Logical Names is visible.
2. Right-click Logical Names and select New Logical Name.
3. In New Logical Name, enter the name. For a RSLogix 5000 controller, type a name that is identical to the device name stored in the controller.
4. Select OK.

The logical name is created and can be assigned to an area or application using Resources Editor.

Tip: Alternatively, select an area or application and add a logical name to it. This assigns the logical name to the area or application so that it immediately inherits the security permissions of that area or application.

Delete a logical name

Delete a logical name from Networks and Devices when not needed as an alias for a control device or network. After deleting a logical name, the security
permissions for the devices associated with it revert to the permissions of the device or network.

| Important: | Because RSLogix 5000 controllers do not use network relative paths, deleting a logical name associated with a RSLogix 5000 controller can cause unexpected results. |

To delete a logical name

1. In FactoryTalk Administration Console Explorer, expand **Networks and Devices** until Logical Names is visible.

2. Right-click the logical name and select **Delete**.

See also

- Add a logical name on page 123
- Delete a logical name from an area or application on page 127
- Logical names on page 121

Add a device to a logical name

Use Logical Name Properties to add control devices or networks to a logical name so that they inherit the security permissions of the logical name.

To add devices to a logical name

1. In FactoryTalk Administration Console Explorer, expand **Networks and Devices** until the logical name is visible.

2. Right-click the logical name, then select **Properties**.

3. In Logical Name Properties, select **Add**.

4. In Device Browser, select a device, or type the network relative path to a device that does not exist yet, but will be added later.

5. When finished, select **OK**.

See also

- Remove a device from a logical name on page 124
- Logical Name Properties on page 122

Remove a device from a logical name

Use Logical Name Properties to remove a device association from a logical name.
Manage logical names

Chapter 11

Important:
Do not remove an RSLogix 5000 controller from a logical name. Because RSLogix 5000 controllers do not use network relative paths, removing the device from a logical name can cause unexpected results.

To remove a device from a logical name

1. In FactoryTalk Administration Console Explorer, expand Networks and Devices until the logical name is visible.
2. Right-click the logical name, then select Properties.
3. In Logical Name Properties, in the Device members list, select a device or network.
4. Select Remove, then OK.

See also

Assign a control device to a logical name on page 125
Delete a logical name on page 123

Assign a control device to a logical name

A logical name is an alias that identifies a control network or device. Add logical names in FactoryTalk Administration Console before configuring security for RSLogix 5000 controllers. If assigned to an area or application, a logical name inherits the security permissions of that area or application.

Use Device Properties to assign a control device to an existing logical name or add the device to a new logical name.

To assign a control device to a logical name

1. Expand Networks and Devices until the network or device is visible.
2. Right-click the network or device and select Properties.
3. In Device Properties, the Logical name list displays the current logical name the device or network it is assigned to.
4. Either:
   - Assign a new logical name. Select <New...>. In New Logical Name, enter a descriptive name and select OK.
   - Select from an existing logical name or change the logical name associated with the device. Select the Logical name drop-down and select the logical name to assign the device to.
5. Select OK.
6. If different computers have different relative paths to the device, add an identical logical name for the control device on each computer on the network that has access to the device.

**Tip:** If you change the logical name of a control device, the security permissions remain associated with the first logical name. Re-add security permissions for the device to associate them with the new logical name.

See also

- Remove a device from a logical name on page 124
- Add a logical name to an area or application on page 126

### Add a logical name to an area or application

Devices with identical logical names share security permissions across different control networks and across different computers, even if those devices are configured with different driver names or network paths. Add logical names before configuring security for RSLogix 5000 controllers. For all other types of control hardware, choose whether to associate security settings with logical names or with network relative paths.

Add a logical name to an area or application when the permissions associated with the logical name are inherited from that area or application.

**Prerequisites**

Adding a logical name requires these permissions for the area or application:

- Common > Create Children
- Common > List Children
- Common > Read

**To add a logical name to an area or application**

1. In FactoryTalk Administration Console Explorer, right-click the application or area, point to Logical Name and then select New.
2. In New Logical Name, type a name and select OK.

See also

- Logical names on page 121
- Delete a logical name from an area or application on page 127
Delete a logical name from an area or application

Delete a logical name from an area or an application to break the link between the logical name and the permissions associated with the area or application.

Prerequisites

Deleting a logical name requires these permissions for the application or area:

- Common > Delete
- Common > List Children
- Common > Read

To delete a logical name from an area or application

1. In FactoryTalk Administration Console Explorer, expand the local or network directory tree until the application or area that contains the logical name is visible.

2. Right-click the application or area icon, and select Resource Editor.

3. In the Resources Editor, the application is selected in the Areas list.

4. In the Associated Resources list, select the logical name to delete, and then select Cut.

5. Select Close.

See also

Logical names on page 121
Add a logical name to an area or application on page 126

New Logical Name

How do I open New Logical Name?

1. Start FactoryTalk Administration Console or FactoryTalk View Studio and then log on to the FactoryTalk Network Directory or FactoryTalk Local Directory where you want to edit devices.

2. Expand the Explorer tree until the application or area containing the resource grouping you want to edit is visible.

3. Right-click the application or area, and then click Resource Editor on the context menu.

4. In the Resources Editor dialog box, click Manage Resources. In the Select resources for dialog box, do one of the following:
• To edit the devices belonging to an existing logical name, expand the **Logical Names** folder, right-click the logical name whose device members you want to edit, and then click **Properties** on the context menu.

• To create a new logical name and add devices to it, click the **Add New Logical Name** button. In the New Logical Name dialog box, type a logical name and then click OK.

Use **New Logical Name** to create an alias for the path to a device. A logical name associates security permissions directly with the name, rather than with the path. This allows you to associate a network or device with a single set of security permissions. Devices with identical logical names share security permissions across different control networks and across different computers.

**Important:** When using RSLogix 5000® controllers, you must use logical names to add a mapping between FactoryTalk Administration Console and the devices.

After creating a new logical name, type a descriptive name to identify it.

• If **New Logical Name** is opened from an application or area in FactoryTalk Administration Console **Explorer**, the new logical name is assigned to the application or area.

• If **New Logical Name** is opened from **Select Resources**, use **Logical Name Properties** to assign the new logical name to an application or area.

**See also**

*Add a logical name* on page 123

*Add a logical name to an area or application* on page 126

*Resources Editor* on page 135

**Logical Name Properties**

**How do I open Logical Name Properties?**

1. Start FactoryTalk Administration Console or FactoryTalk View Studio and then log on to the FactoryTalk Network Directory or FactoryTalk Local Directory where you want to edit devices.

2. Expand the Explorer tree until the application or area containing the resource grouping you want to edit is visible.

3. Right-click the application or area, and then click **Resource Editor** on the context menu.

4. In the **Resources Editor** dialog box, click **Manage Resources**. In the **Select resources for** dialog box, do one of the following:
• To edit the devices belonging to an existing logical name, expand the Logical Names folder, right-click the logical name whose device members you want to edit, and then click Properties on the context menu.

• To create a new logical name and add devices to it, click the Add New Logical Name button. In the New Logical Name dialog box, type a logical name and then click OK.

Use Logical Name Properties to:

• View the control devices associated with a logical name
• Add or remove control devices from a logical name
• View or remove the area associated with a control device via its resource grouping

Use the following settings to edit the properties of a logical name.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logical name</td>
<td>Select a logical name to edit the control devices associated with it. To create a new logical name, select New and then, in New Logical Name, type a logical name. For a RSLogix 5000 controller, type a name that is identical to the device name stored in the controller. Devices with identical logical names share security permissions across different control networks and across different computers, even if those devices are configured with different driver names or network paths. After defining a logical name, create security permissions for the control device. The new security permissions that you define are now associated with the logical name. Any security permissions defined earlier, before a logical name was added, remain associated with the device’s network relative path, and are not copied to the logical name. Because RSLogix 5000 devices do not use network relative paths, define logical names for RSLogix 5000 devices before configuring security.</td>
</tr>
<tr>
<td>Device members</td>
<td>This list shows the network relative paths of the devices that are referenced by the selected logical name. To add devices to the selected logical name, select Add. You can add multiple devices to a single logical name, but you cannot add a single device to multiple logical names. To save changes, select Apply. To remove a device from the selected logical name, select the device and then select Remove.</td>
</tr>
<tr>
<td>Area associated with</td>
<td>If the selected logical name is a member of a hardware resource grouping, this field shows the area from which the logical name inherits its security permissions. The information in this field appears only as a reference. You cannot edit this field. To remove the logical name from the area, select Remove.</td>
</tr>
</tbody>
</table>

See also

Add a logical name on page 123
Add a device to a logical name on page 124
Remove a device from a logical name on page 124

Device Properties

For control hardware displayed in the Networks and Devices tree, use Device Properties to:

• View network relative paths
• Add a device to a new logical name
• Assign a control device to an existing logical name
• Change the logical name associated with the device
• Remove a device from a logical name
• Remove the control device from a resource grouping

**Important:** Do not remove RSLogix 5000 controllers from a logical name. Because RSLogix 5000 controllers do not use network relative paths, removing the device from a logical name can cause unexpected results.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Device path</td>
<td>Displays the network relative path of the device. This setting is read-only.</td>
</tr>
<tr>
<td>Logical name</td>
<td>Associates a device with a logical name. Select a logical name to view the area associated with the logical name. The area indicates the resource grouping to which the logical name belongs. Do either:</td>
</tr>
<tr>
<td></td>
<td>• To create a new logical name, select &lt;New...&gt;. In New Logical Name, enter a descriptive name and select OK.</td>
</tr>
<tr>
<td></td>
<td>• To associate the device with an existing logical name, or to change the logical name associated with the device, under Logical name select the logical name.</td>
</tr>
<tr>
<td></td>
<td>• To remove the logical name the device is associated with, select None. The security system automatically uses the security permissions associated with the device’s network relative path.</td>
</tr>
<tr>
<td>Area associated with</td>
<td>If the selected logical name is a member of a hardware resource grouping, this setting displays the area from which the logical name inherits its security permissions. This setting is read-only.</td>
</tr>
<tr>
<td>Remove</td>
<td>To remove the logical name from the area, select Remove. This removes the logical name from the resource grouping.</td>
</tr>
</tbody>
</table>

See also

Assign a control device to a logical name on page 125
Chapter 12

Resource grouping

A resource grouping is a collection of hardware resources from the Networks and Devices tree that is associated with an application or area. Grouping hardware resources under an application or area allows defining of security permissions for a set of control hardware in one step, rather than having to set permissions for each device separately. Hardware in a resource grouping can be defined by its network relative path or by its logical name.

To manage the security of control hardware through an application or area, use the Resources Editor to:

- Group hardware resources in an application or area.
- Move a resource between areas.
- Remove devices from a resource grouping.

See also

Group hardware resources in an application or area on page 132
Move a resource between areas on page 133
Remove a device from a resource grouping on page 134
Resource groupings on page 131

A resource grouping is a collection of hardware resources from the Networks and Devices tree that is associated with an application or area. A resource grouping is not a separate account type.

Grouping resources under an application or area allows granting or denying security permissions for a set of control hardware in one step, rather than setting permissions for each device separately.

Create a resource grouping in any application or area in the FactoryTalk Directory by selecting resources to associate with the area in the Resources Editor. A resource grouping automatically inherits the security settings of the application or area where the resource group is located.
These security permissions might be explicit permissions defined specifically for
the area, or they might be inherited from the application in which the area is
located, or from the FactoryTalk Directory in which the application is located. If
needed, set explicit permissions for a device that override the security permissions
set for its resource group by browsing for the network or device in the Networks
and Devices tree.

To prevent conflicting permissions, these configurations are not permitted:

• Nesting resource groupings within other resource groupings.
• Including the same network or device in multiple resource groupings within
  the same FactoryTalk Directory.

See also

Group hardware resources in an application or area on page 132
Remove a device from a resource grouping on page 134
Permissions on page 138

Group hardware resources to manage their security settings through the
application or area. Devices in a resource grouping inherit security permissions
from their associated application or area.

Prerequisites

Grouping hardware resources together requires these permissions for the
application or area:

• Common > Read
• Common > List Children
• Common > Configure Security

To group hardware resources in an application or area

1. In FactoryTalk Administration Console Explorer right-click any
   application or area and then select Resource Editor.
2. In Resources Editor, select Manage Resources. Select Resources opens
3. (optional) To create a new logical name that can be added to a resource
grouping, select Add New Logical Name.
4. Select the resource, either:
Select the logical name of the resource. Expand the Logical Names tree until the device is visible.

To filter the list of logical names:

- Select **Show only logical names not associated with areas** to view the logical names for only those devices that are not already associated with an application or area.
- Select **Show all logical names** to view all logical names even if they are already associated with an application or area.

- Select the resource using its network relative path, expand the Networks and Devices tree until the device is visible.

5. After selecting the resource in the tree, use the > to move it into the Selected resources list.

6. When finished, select **OK**.

**See also**

- **Move a resource between areas** on page 133
- **Remove a device from a resource grouping** on page 134
- **Resource groupings** on page 131

**Move a resource between areas**

Use the **Resources Editor** to move a hardware resource from one application or area to another. The device or control network that is moved inherits the security permissions of its new area or application.

**Prerequisites**

Moving hardware resources between areas requires these permissions for the application or area:

- Common > Read
- Common > List Children
- Common > Configure Security

**To move a resource between areas**

1. In FactoryTalk Administration Console **Explorer**, right-click any application or area and then select **Resource Editor**.

2. In the **Areas** list, select the area containing the resource to copy.
3. In the **Associated resources** list, right-click the resource, and then select **Cut**.

4. In the **Areas** list, select the area to copy the resource to, right-click the **Associated resources** list again, and then select **Paste**.

5. When finished, select **Close**.

**See also**

- [Group hardware resources in an application or area](#) on page 132
- [Remove a device from a resource grouping](#) on page 134
- [Resource groupings](#) on page 131

### Remove a device from a resource grouping

Remove a device from a resource grouping to break the link between its security permissions and those of the application or area to which it belongs.

When a device is removed from a resource grouping, the security permissions for the device revert to what they were for either the logical name of the device — if the device is associated with a logical name — or for the network relative path of the device. The changes take effect immediately when applied.

**Prerequisites**

Removing a device from a resource group requires these permissions for the application or area:

- Common > Configure Security
- Common > List Children
- Common > Read

**To remove a device from a resource grouping**

1. In FactoryTalk Administration Console **Explorer**, right-click the application or area containing the resource grouping, and select **Resource Editor**.

2. In the **Areas** list of the **Resources Editor**, select the area or application containing the resource to delete.

3. In the **Associated resources** list, right-click the resource, and then select **Cut**.

4. When finished, select **Close**.
See also

Resource groupings on page 131

Resources Editor

How do I open Resources Editor?

1. Start FactoryTalk Administration Console or FactoryTalk View Studio and then log on to the FactoryTalk Network Directory or FactoryTalk Local Directory where you want to modify resource groupings.

2. In the Explorer window, right-click any application or area and then click Resource Editor on the context menu.

Use Resources Editor to edit a resource grouping in an area or application. Select Manage Resources to add or remove resources, or to map resources to logical names.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Areas</td>
<td>Displays the applications and areas in the FactoryTalk network directory, or the applications in the FactoryTalk local directory. Select an area or application to view the list of resources associated with it.</td>
</tr>
<tr>
<td>Associated resources</td>
<td>Shows the hardware devices located in the application or area. Devices that are represented by logical names are displayed using their logical names. Devices that are represented by network relative paths are shown by their network relative paths.</td>
</tr>
<tr>
<td></td>
<td>• To remove a resource, right-click the resource and then select Cut. When removing a device from a resource grouping, the security permissions for the device revert to what they were for either logical name of the device, if the device is associated with a logical name, or for the network relative path of the device. Select OK and the changes take effect immediately.</td>
</tr>
<tr>
<td></td>
<td>• To move a resource from one area to another, in the Areas list, select the area containing the resource to copy. In the Associated resources list, right-click the resource, and select Cut. In the Areas list, select the area to copy the resource to. Right-click the Associated resources list again, and select Paste.</td>
</tr>
<tr>
<td>Manage Resources</td>
<td>Select Manage Resources to add or remove resources in the selected application or area, or to map resources to logical names.</td>
</tr>
</tbody>
</table>

See also

Group hardware resources in an application or area on page 132

Remove a device from a resource grouping on page 134

Select Resources

Use Select Resources to associate resources with an application or area. Referenced the hardware devices by logical name or by network relative path. Use these settings to specify how resources are added to the grouping.
Resource grouping

### Setting Description

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select resources to be associated with an area</td>
<td>• To view the logical names for only those devices that are not already associated with an application or area, select <strong>Show only logical names not associated with areas</strong>. Ignore this setting if not using logical names with networks and devices.</td>
</tr>
<tr>
<td></td>
<td>• To view all logical names, even those already associated with an application or area, select <strong>Show all logical names</strong>. Ignore this setting if not using logical names with networks and devices.</td>
</tr>
<tr>
<td></td>
<td>• To add a logical name to the list of resources in the grouping, select the logical name and select &gt;. The same network or device (represented by a logical name) cannot be added to multiple resource groupings.</td>
</tr>
<tr>
<td></td>
<td>• To add a device using its network relative path, expand the <strong>Networks and Devices</strong> tree until the device is visible. Select the device and select &gt;. The same network or device cannot be added to multiple resource groupings.</td>
</tr>
<tr>
<td>Add New Logical Name</td>
<td>Select to create a new logical name for a device.</td>
</tr>
<tr>
<td>Delete Logical Name</td>
<td>Delete logical names that are no longer in use in the system, but remain visible in this dialog box. This occurs if the device associated with a logical name was deleted. <strong>Delete Logical Name</strong> is disabled if the selected logical name is in use.</td>
</tr>
<tr>
<td>Selected resources</td>
<td>Shows the resources that are associated with the application or area. To remove a resource from the list, select the resource and select &lt;.</td>
</tr>
</tbody>
</table>

See also

- [Group hardware resources in an application or area](#) on page 132
- [Resource groupings](#) on page 131
Secure resources

To secure the resources in the FactoryTalk system, select the resource, and use Allow or Deny permissions to specify which users can perform what actions on that resource from what computers. This helps ensure that only authorized personnel can perform approved actions from appropriate locations.

Common actions include the ability to see the resource, to edit or delete it, and to add additional items to the resource. Additional securable actions might appear, depending on which FactoryTalk products installed.

Set security permissions for:

- FactoryTalk local or network directory
- Applications
- Areas
- System folder
- Action groups
- Policies
- Computers and Computer Groups
- Users and User Groups
- Connections, including databases
- Networks and devices

Security for networks and devices follows special rules for inheriting security permissions, and includes the use of logical names, permission sets, and resource groupings. For this reason, security for networks and devices is covered in its own section.

See also

Permissions on page 138
Set FactoryTalk Directory permissions on page 146
View effective permissions on page 158
Permissions determine which users can perform which actions on specific resources in the system from which computers.

Allow and Deny permissions

Set two kinds of permissions on resources:

- **Allow** permissions grant users permission to perform actions on resources from all computers or from only certain computers on a network. For example, in a FactoryTalk network directory, for a resource such as an area containing various servers, assign Allow permission to a Read action for a group of users named Designers from All Computers. This allows members of the Designers group to view the contents of the area from any computer on the network.

- **Deny** permissions prevent users from performing actions on resources from all computers or from only certain computers on a network. In a FactoryTalk local directory, security permissions apply to only the local computer. In a network directory, for an area containing various servers, assign Deny permissions to a Write action for a group of users named Designers from All Computers to prevent members of the Designers group from modifying the contents of the area.

Remove all permissions from an object by clearing both Allow and Deny. This allows the object to inherit permissions assigned at a higher level. For example, remove all permissions from an area located in an application, the area then inherits permissions from the application.

If no permissions are assigned to a resource at any level, Deny is implied.

**Product policies** do not inherit security settings. When specifying permissions for product policies, clearing both Allow and Deny does not allow the policy setting to inherit security. Instead, clearing both denies access to the product feature.

Inherited and explicit permissions

By default, resources inherit permissions automatically from their parent resources. For example, if assigning security to an area in an application, all of the items in the area inherit the security settings of the area, and the area inherits security settings from the application. The top of the hierarchy is the network directory or local directory.

Networks and devices that are referenced by logical names, rather than by network relative paths, inherit permissions differently than other resources.
Override inherited permissions two ways:

- **Set up explicit permissions** for resources at a lower level of the hierarchy. For example, if an area inherits permissions from an application, override the inherited permissions by specifying permissions explicitly for the area.

  Explicit permissions are permissions assigned deliberately to the resource, for users, groups, or computers, and actions. Explicit permissions take precedence over inherited permissions.

- **Break the chain of inheritance** at a level in the Network Directory or Local Directory tree. For example, stop an area from inheriting permissions from the application in which it is located by selecting **Do not inherit permissions** when setting up security for the area. When breaking the chain of inheritance, specify whether to remove all permissions from resources below the break (which then implies Deny permission), or whether to use the permissions that are inherited by the resource at the break as explicit permissions.

The principle of inheritance allows setting permissions at as high a level as is practical, and then introducing exceptions at lower levels where necessary. If permissions are not assigned at any level, Deny is implied. When the system evaluates the level of access provided to a user, computer, or group, Deny permissions are evaluated before Allow permissions, explicit permissions override inherited permissions, and where conflicting permissions exist, Deny takes precedence over Allow.

**Categories of permissions for actions**

The actions that users can perform on resources are grouped into categories. The Common category is common to all FactoryTalk products. Create action groups to assign security permissions to all of the actions in the group in one step, rather than assigning permissions to each action separately.

**Effective permissions**

To find out what actions a user or group can perform on a resource, view the permissions in effect (effective permissions) for the resource. The effective permissions are shown in the Effective Permissions tab of the Security Settings for the resource.

**Effective Permissions** shows the permissions that are granted to the selected user, computer, or group. When calculating effective permissions, the system takes into account the permissions in effect from group membership, as well as any permissions inherited from the parent object.

If a check mark appears for an action, permission is allowed, whether explicitly or by inheritance. If a check mark does not appear, permission is denied, whether
explicitly or by inheritance. If a category (for example, Common) shows a gray check mark, one or more – but not all – of the actions inside the category is allowed. Expand the category to see which permissions within it are allowed or denied.

See also

Breaking the chain of inheritance on page 140

Order of precedence on page 142

Secure resources on page 137

View effective permissions on page 158

Breaking the chain of inheritance

By default, resources inherit permissions automatically from their parent resources. For example, if assigning security to an area in an application, all of the items in the area inherit the security settings of the area, and the area inherits security settings from the application. The top of the hierarchy is the network directory or local directory.

Override inherited permissions in two ways:

- **Set up explicit permissions** for resources at a lower level of the hierarchy. For example, if an area inherits permissions from an application, override the inherited permissions by specifying permissions explicitly for the area.

- **Break the chain of inheritance** at a level in the network directory or local directory tree. For example, stop an area from inheriting permissions from the application in which it is located by selecting **Do not inherit permissions** when setting up security for the area. When breaking the chain of inheritance, specify whether to remove all permissions from resources below the break (which then implies **Deny** permission), or whether to use the permissions that are inherited by the resource at the break as explicit permissions.

Permissions are inherited only as far up the network directory or local directory tree as the chain of inheritance remains intact. For example, when **Do not inherit permissions** for an area is selected, items that inherit permissions inside the area can inherit permissions only as far as the area. They cannot inherit permissions...
from the application in which the area is located. Because breaking the chain of inheritance complicates administration, only do this when absolutely necessary.

The principle of inheritance allows setting permissions at as high a level as is practical. Then, introduce exceptions at lower levels where necessary.

If permissions are not assigned at any level, **Deny** is implied.

**See also**

- [Permissions](#) on page 138
- [Order of precedence](#) on page 142
Secure resources on page 137

Order of precedence

When the system evaluates the level of access a user, computer, or group has, these rules apply:

- **Deny permissions are implied.** If no permissions are assigned to a resource, Deny is implied. Use implied Deny permissions rather than explicit Deny permissions wherever possible, because this simplifies administration.

- **Deny permissions are evaluated before Allow permissions.** For example, if the Operators group is explicitly denied access to a data server, but an individual user account in the group (Jane) is explicitly allowed access, the Deny rule for the group account takes precedence over the Allow rule for the individual account, and Jane cannot access the data server as long as she is a member of the Operators group.

- **Explicit permissions override inherited permissions.** For example, assume your application has an area named Baking, and Operators are allowed Read access to the area. If a rule is applied to the Operators group that specifically denies Read access to an HMI server in the Baking area, the Deny permission takes precedence over the Allow permission.

  This means that an explicit Allow permission overrides an inherited Deny permission, and an explicit Deny permission overrides an inherited Allow permission.

- **If conflicting explicit permissions are set at the same level, Deny takes precedence over Allow.** For example, the Operators are explicitly denied group access to a data server, but an individual user account (Jane) is explicitly allowed access to the data server. Deny takes precedence over Allow, and Jane cannot access the data server if she is a member of the Operators group. This happens because conflicting explicit permissions are set on the same resource. To allow Jane access to the data server, deny the Operators group access to the resource at a higher level in the hierarchy (for example, the area in which the data server is located), and then explicitly allow exceptions for the data server.

See also

- Breaking the chain of inheritance on page 140
- Permissions on page 138
- Secure resources on page 137
When setting up security, specify which actions a user or group can perform on a selected resource. In a FactoryTalk network directory, specify from which computer or group of computers a user can perform the action.

A group of common actions are installed by default with the FactoryTalk Services Platform. However, different sets of actions apply to different resources in the directory. Additional securable actions might appear, depending on which FactoryTalk products are installed. For details about using those actions, see the documentation for your FactoryTalk products.

**Read**

Controls whether a user or group can see the resource in the **Explorer** from a computer or group of computers.

<table>
<thead>
<tr>
<th>Resource type</th>
<th>Result of Denying &quot;Read&quot;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network directory or local directory</td>
<td>Prevents users from seeing the directory or its contents.</td>
</tr>
<tr>
<td>Application</td>
<td>Prevents users from seeing the application or its contents. Denying Read does not prevent users from reading tag values from data servers in the application.</td>
</tr>
<tr>
<td>Area</td>
<td>Prevents users from seeing the area or its contents. Denying Read does not prevent users from reading tag values from data servers in the area.</td>
</tr>
<tr>
<td>System folder</td>
<td>Prevents users from seeing the System folder or its contents. Denying Read does not prevent users from reading tag values for devices in the Networks and Devices tree.</td>
</tr>
<tr>
<td>Networks and Devices tree</td>
<td>Prevents users from seeing the Networks and Devices tree and its contents. Denying Read does not prevent users from reading tag values for a particular device.</td>
</tr>
<tr>
<td>Individual network or device in the Networks and Devices tree</td>
<td>Prevents users from seeing the network or device and its contents. Denying Read does not prevent users from reading tag values for a particular device.</td>
</tr>
</tbody>
</table>

**Write**

Controls whether a user or group can write to the resource from a computer or group of computers.

<table>
<thead>
<tr>
<th>Resource type</th>
<th>Result of Denying &quot;Write&quot;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network directory or local directory</td>
<td>Prevents users from modifying the properties of any item in the directory. For example, denying Write prevents users from modifying the description of an application, area, or the properties of a data server. However, if Create Children is allowed, the user or group can create applications in the directory, add areas to an application, and add data servers to areas.</td>
</tr>
<tr>
<td>Application</td>
<td>Prevents users from modifying the properties of any item in the application. For example, denying Write prevents users from modifying the description of the application, the descriptions of areas within the application, or the properties of data servers within the application or its areas. However, if Create Children is allowed, the user or group can add areas or data servers to an application, and can add data servers to areas.</td>
</tr>
<tr>
<td>Area</td>
<td>Prevents users from modifying the properties of any item in the area. For example, denying Write prevents users from modifying the description of the area, or the properties of data servers within the area. However, if Create Children is allowed, the user or group can add areas or data servers within the area.</td>
</tr>
</tbody>
</table>
## Secure resources

### System folder
Prevents users from modifying the properties of any item in the System folder. For example, denying **Write** prevents users from modifying policy settings, and the properties of user accounts, such as an account's description or group memberships. Denying **Write** also prevents deleting user and group accounts, if the accounts have group memberships associated with them. This is because the group memberships are updated automatically when an account is deleted, and updating group memberships is controlled by the **Write** action.

### Networks and Devices tree
Prevents users from defining, modifying, or removing logical names for networks or devices. Denying **Write** does not prevent users from writing tag values to devices.

### Individual network or device in the Networks and Devices tree
Prevents users from defining, modifying, or removing logical names for the network or device. Denying **Write** does not prevent users from writing tag values to devices.

## Configure Security

Controls whether a user or group can change the security permissions for the resource, while working from a computer or group of computers, by using FactoryTalk Administration Console and selecting **Security** for the resource.

Denying **Configure Security** has the same effect on all types of securable resources. For example, if a user is denied **Configure Security** for an area, the user cannot change the security settings of the area, such as allowing or denying users permission to perform actions in the area, while working from the specified computer or group of computers.

Similarly, denying **Configure Security** on the **Users and Groups** folder prevents users from setting security permissions for the **Users and Groups** folder. Denying **Configure Security** on the **Users and Groups** folder does **not** limit the access users have to resources in the system.

## Create Children

Controls whether a user or group can create a new, related resource beneath an existing resource in the FactoryTalk Administration Console directory tree while working from a computer or group of computers.

<table>
<thead>
<tr>
<th>Resource type</th>
<th>Result of Denying &quot;Create Children&quot;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network directory or local directory</td>
<td>Prevents users from creating applications or areas.</td>
</tr>
<tr>
<td>Application</td>
<td>Prevents users from creating areas or data servers in the application.</td>
</tr>
<tr>
<td>Area</td>
<td>Prevents users from seeing the area or its contents. Denying <strong>Read</strong> does not prevent users from reading tag values from data servers in the area.</td>
</tr>
<tr>
<td>System folder</td>
<td>Prevents users from creating user, computer, or group accounts. Denying <strong>Create Children</strong> has no effect on policies.</td>
</tr>
<tr>
<td>Networks and Devices tree</td>
<td><strong>Create Children</strong> is not available because users cannot add items to the Networks and Devices tree. Networks and Devices is populated automatically, based on the networks and devices that are available to your local computer.</td>
</tr>
<tr>
<td>Individual network or device in the Networks and Devices tree</td>
<td><strong>Create Children</strong> is not available because users cannot add items to the Networks and Devices tree. Networks and Devices is populated automatically, based on the networks and devices that are available to your local computer.</td>
</tr>
</tbody>
</table>
List Children

Controls whether a user or group can list the children of the resource from a computer or group of computers.

Denying List Children has the same effect on all types of securable resources. For example, if List Children access is denied to an application, the user or group can see the application, but not its contents while working from the specified computer or group of computers.

Unlike the Read action, List Children does allow the user to see the resource that contains other resources, for example, the application that contains areas or data servers.

Execute

Controls whether a user or group can perform an executable action from a computer or group of computers. The Execute action is used primarily for Product Policy Feature Security settings.

Instead of using the Execute action, each FactoryTalk product can use its own actions to secure its executable features. For details about what, if anything, the Execute action does in a particular FactoryTalk product, see the documentation for that product.

Delete

<table>
<thead>
<tr>
<th>Resource type</th>
<th>Result of Denying &quot;Delete&quot;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network directory or local directory</td>
<td>Prevents users from deleting any item in the directory, for example, applications, areas, data servers, or user accounts.</td>
</tr>
<tr>
<td>Application</td>
<td>Prevents users from deleting the application, or any item within it, for example, areas, or data servers.</td>
</tr>
<tr>
<td>Area</td>
<td>Prevents users from deleting the area, or any item within it, for example, data servers within the area.</td>
</tr>
<tr>
<td>System folder</td>
<td>Prevents users from deleting any item in the System folder, for example, user, computer, or group accounts. If a user, computer, or group account has group memberships associated with it, deleting the account also requires Write permission, because updating the group memberships of accounts is controlled by the Write action.</td>
</tr>
<tr>
<td>Networks and Devices tree</td>
<td>The Delete action is not available because users cannot remove items from the Networks and Devices tree. Networks and Devices is populated automatically, based on the networks and devices that are available to your local computer.</td>
</tr>
<tr>
<td>Individual network or device in the Networks and Devices tree</td>
<td>The Delete action is not available because users cannot remove items from the Networks and Devices tree. Networks and Devices is populated automatically, based on the networks and devices that are available to your local computer.</td>
</tr>
</tbody>
</table>

Tag actions: Write Value

Controls whether a user or group can write to tags in data servers from a computer or group of computers. Configure this action on the network directory or local directory, an application, or an area.
The **Write Value** action does not prevent users from writing values to tags in specific hardware devices. **Write Value** prevents writing values to all of the tags managed by a data server.

If additional FactoryTalk products are installed, they might install additional Tag actions. For details about these actions, see Help for your FactoryTalk products.

**User Action Groups**

This category contains the added action groups. If no action groups were added, this category does not appear.

**See also**

- [Things you can secure](#) on page 32
- [Account types](#) on page 20
- [Differences between securable actions and product policies](#) on page 119
- [Effective permission icons](#) on page 160
- [Secure features of a single product](#) on page 116

**Set FactoryTalk Directory permissions**

Set permissions on your FactoryTalk Directory folder to control whether a user or group can:

- See the directory or its contents (**Read**)
- Modify the properties of any item in the directory (**Write**)
- Add applications, areas, and data servers to the directory (**Create Children**)
- Change the security settings of the directory (**Configure Security**)
- View child folders within the directory (**List Children**)
- Write tags in data servers (**Write Value**)
- Perform other product-specific actions
- Perform actions defined in user action groups
Tip:

- Denying Write prevents users from modifying the properties of any item in the directory. However, if Create Children is allowed, the user or group can add items to the directory.
- The Write Value action does not prevent users from writing values to tags in specific hardware devices.

Prerequisites

Setting FactoryTalk Directory permissions requires these permissions:

- Common > Read
- Common > Configure Security

To set FactoryTalk Directory permissions

1. In FactoryTalk Administration Console Explorer, right-click the FactoryTalk network or local directory, and select Security.

2. In Security Settings for [Local or Network], in the Permissions tab, either:
   
   - Set permissions by user:
     - Select User.
     - In Users and Computers, select a user and computer.
     - In Action, expand the category that contains the action to secure, and select the action.

   - Set permissions by action:
     - Select Action.
     - In Action, expand the category that contains the action to secure, and select the action. If the list of actions is blank, add users and computers first.
     - In Users and Computers, select a user and computer.

3. Select Allow or Deny.

4. (optional) To control access to the action by another user or group, select Add and select the user or group, and computer or group, and select OK.

5. When finished configuring security for the FactoryTalk Directory, select OK.
See also

Security Settings-Permissions

Security Settings-Effective Permissions

Security Settings-Inherit Permissions

Actions on page 142

Secure resources on page 137

Set application permissions

Set permissions on the application to control whether a user-computer pair can:

- See the application or its contents (Read)
- Modify the properties of any item in the application (Write)
- Add areas or data servers to the application (Create Children)
- Change the security settings of the application (Configure Security)
- View the contents of the application (List Children)
- Delete the application or any item within it (Delete)
- Write tags in data servers (Write Value)
- Perform other product-specific actions
- Perform actions defined in user action groups

If a resource grouping is associated with the application, the networks or devices in the resource grouping inherit the security permissions of the application.

Tip:
- Denying Read does not prevent users from reading tag values from data servers in the application.
- Denying Write prevents users from modifying the properties of any item in the application. However, if Create Children is allowed, users can add areas or data servers to an application.
- The Write Value action does not prevent users from writing values to tags in specific hardware devices.

Prerequisites

Setting application permissions requires these security permissions:

- Common > Read
- Common > Configure Security
To set application permissions

1. In FactoryTalk Administration Console Explorer, right-click the application to secure, then select Security.

2. In Security Settings, in the Permissions tab, either:
   - Set permissions by user:
     - Select User.
     - In Users and Computers, select a user and computer.
     - In Action, expand the category that contains the action to secure, and select the action.
   - Set permissions by action:
     - Select Action.
     - In Action, expand the category that contains the action to secure, and select the action. If the list of actions is blank, add users and computers first.
     - In Users and Computers, select a user and computer.

3. Select Allow or Deny, or clear both. Clear both Allow and Deny to make the application inherit its security settings from the FactoryTalk Directory folder.

4. (optional) To control access to the action by another user or group, select Add, and in Select User and Computer, select the user or group, and computer or group to add, and select OK.

5. When finished configuring security for the application, select OK.

See also

View effective permissions on page 158

Add a user-computer pair on page 63

Secure resources on page 137

Actions on page 142

Set area permissions

Set permissions on an area in order to control whether a user-computer pair can:

- See the area or its contents (Read)
- Modify the properties of any item in the area (Write)
- Add areas or data servers to the area (Create Children)
• Change the security settings of the area (Configure Security)
• View the contents of the area (List Children)
• Delete the area or any item within it (Delete)
• Write tags in data servers (Write Value)
• Perform other product-specific actions
• Perform actions defined in user action groups

For example, set Read and Write permissions to the Ingredients area within an application to allow the operators of the Ingredients machinery to read and write values to and from controllers in their own area, but only when using computers located within sight of the equipment.

If a resource grouping is associated with the area, the networks or devices in the resource grouping inherit the security permissions of the area.

Tip:
- Denying Read does not prevent users from reading tag values from data servers in the area.
- Denying Write prevents users from modifying the properties of any item in the area. However, if Create Children is allowed, users can add areas or data servers within the area.
- The Write Value action does not prevent users from writing values to tags in specific hardware devices.

Prerequisites

Setting area permissions requires these security permissions:

• Common > Read
• Common > Configure Security

To set area permissions

1. In FactoryTalk Administration Console Explorer, expand the application, right-click the area to secure, and select Security.

2. In Security Settings, in the Permissions tab, either:

• Set permissions by user:
  • Select User.
  • In Users and Computers, select a user and computer.
  • In Action, expand the category that contains the action to secure, and select the action.
• Set permissions by action:
  • Select Action.
  • In Action, expand the category that contains the action to secure, and select the action. If the list of actions is blank, add users and computers first.
  • In Users and Computers, select a user and computer.

3. Select Allow or Deny, or clear both. Clear both Allow and Deny to make the area inherit its security settings from a resource higher in the FactoryTalk Directory tree.

4. (optional) To control access to the action by another user or group, select Add. In Select User and Computer, select the user or group, and computer or group to add, and select OK.

5. When finished configuring security for the area, select OK.

See also

View effective permissions on page 158
Add a user-computer pair on page 63
Actions on page 142
Secure resources on page 137

Set System folder permissions

Set permissions on the System folder to control whether a user-computer pair can:

• See the System folder or its contents (Read)
• Modify the properties of any item in the System folder (Write)
• Add user, user group, computer, or computer group accounts (Create Children)
• Change the security settings of the System folder (Configure Security)
• View the contents of the System folder (List Children)
• Delete the System folder or any item within it (Delete)
• Write tags in data servers (Write Value)
• Perform other product-specific actions
• Perform actions defined in user action groups
Tip:
- Denying Read does not prevent users from reading tag values for devices in the Networks and Devices tree.
- Denying Write prevents users from modifying the properties of any item in the System folder. Denying Write also prevents deleting user and group accounts, if the accounts have group memberships associated with them.
- Denying Create Children has no effect on policies.
- If a user, computer, or group account has group memberships associated with it, deleting the account also requires Write permission, because updating the group memberships of accounts is controlled by the Write action.
- The Write Value action does not prevent users from writing values to tags in specific hardware devices.

Prerequisites

Obtain the following security permissions for the System folder:

- Common > Read
- Common > Configure Security

To set System folder permissions

1. In FactoryTalk Administration Console Explorer, right-click the System folder or the subfolder to secure, and select Security.

2. In Security Settings, in the Permissions tab, either:
   - Set permissions by user:
     - Select User.
     - In Users and Computers, select a user and computer.
     - In Action, expand the category that contains the action to secure, and select the action.
   - Set permissions by action:
     - Select Action.
     - In Action, expand the category that contains the action to secure, and select the action. If the list of actions is blank, add users and computers first.
     - In Users and Computers, select a user and computer.

3. Select Allow or Deny, or clear both. Clear both Allow and Deny to make the System folder inherit its security settings from the FactoryTalk Directory folder.

4. (optional) To control access to the action by another user or group, select Add, and in Select User and Computer, select the user or group, and computer or group to add, and select OK.
5. When finished configuring security for the **System** folder, select **OK**.

**See also**

- **View effective permissions** on page 158
- **Add a user-computer pair** on page 63
- **Actions** on page 142
- **Secure resources** on page 137

**Set action group permissions**

Set permissions on an action group to control whether a user-computer pair can:

- See the action group (**Read**)
- Modify the properties of the action group (**Write**)
- Change the security settings of the action group (**Configure Security**)
- Delete the action group (**Delete**)
- Perform actions defined in another user action group

**Prerequisites**

Setting action group permissions requires these security permissions:

- Common > Read
- Common > Configure Security

**To set action group permissions**

1. In FactoryTalk Administration Console **Explorer**, expand the network directory tree, the **System** folder, and the **Action Groups** folder, right-click the action group to secure, and select **Security**.

2. In **Security Settings**, in the **Permissions** tab, either:

   - Set permissions by user:
     - Select User.
     - In the **Users and Computers** list, select a user and computer.
     - In the **Action** list, expand the category that contains the action to secure, and select **Action**.

   - Set permissions by action:
     - Select **Action**.
• In **Action**, expand the category that contains the action to secure, and select the action. If the list of actions is blank, add users and computers first.

• In **Users and Computers**, select a user and computer.

3. Select **Allow** or **Deny**, or clear both. Clear both **Allow** and **Deny** to make **Action Groups** or the individual action group inherit its security settings from a resource higher in the directory tree.

4. (optional) To control access to the selected action by another user or group, Select **Add**. In **Select User and Computer**, select the user or group, and computer or group to add, and select **OK**.

5. When finished configuring security for the action group, select **OK**.

**See also**

- [View effective permissions](#) on page 158
- [Add a user-computer pair](#) on page 63
- [Add and remove action groups](#) on page 69
- [Actions](#) on page 142
- [Secure resources](#) on page 137

**Set database permissions**

Set permissions on a database to specify which user-computer pairs can:

• See the database
• Modify the properties of the database (**Write**)
• Change the security settings of the database (**Configure Security**)
• Delete the database within it (**Delete**)
• Perform actions defined in a user action group

**Prerequisites**

Setting database permissions requires these security permissions:

• Common > Read
• Common > Configure Security
To set database permissions

1. In FactoryTalk Administration Console Explorer, expand System > Connections > Databases, right-click the database, and select Security.

2. In Security Settings, in the Permissions tab, either:
   - Set permissions by user:
     - Select User.
     - In Users and Computers, select a user and computer.
     - In Action, expand the category that contains the action to secure, and select the action.
   - Set permissions by action:
     - Select Action.
     - In Action, expand the category that contains the action to secure, and select the action. If the list of actions is blank, add users and computers first.
     - In Users and Computers, select a user and computer.

3. Select Allow or Deny, or clear both. Clear both Allow and Deny to make the folder inherit its security settings from a resource higher in the directory tree.

4. (optional) To control access to the folder by another user or group, select Add, and Select User and Computer, select the user or group, and computer or group to add, and select OK.

5. When finished configuring security for the database, select OK.

See also

View effective permissions on page 158
Add a user-computer pair on page 63
Actions on page 142
Secure resources on page 137

Set logical name permissions

Set permissions on the logical name to control whether a user-computer pair can:

- See the logical name (Read)
- Modify the properties of the logical name (Write)
- Change the security settings of the logical name (Configure Security)
• Delete the logical name (Delete)
• Perform actions defined in a user action group

Prerequisites

Setting logical name permissions requires these security permissions:

• Common > Read
• Common > Configure Security

To set logical name permissions

1. In FactoryTalk Administration Console Explorer, expand System > Logical Names, right-click the logical name, and select Security.

2. In Security Settings, in the Permissions tab, either:
   • Set permissions by user:
     • Select User.
     • In Users and Computers, select a user and computer.
     • In Action, expand the category that contains the action to secure, and select the action.
   • Set permissions by action:
     • Select Action.
     • In Action, expand the category that contains the action to secure, and select the action. If the list of actions is blank, add users and computers first.
     • In Users and Computers, select a user and computer.

3. Select Allow or Deny, or clear both. Clear both Allow and Deny to make Action Groups or the individual action group inherit its security settings from a resource higher in the directory tree.

4. (optional) To control access to the selected action by another user or group, select Add, and in Select User and Computer, select the user or group, and computer or group to add, and select OK.

5. When finished configuring security for the logical name, select OK.

See also

Secure resources on page 137
Permissions determine which users can perform which actions on specific resources in the system from which computers. Set Allow and Deny permissions on resources.

Allow a resource to inherit permissions when the selected resource has the same permissions as its parent resource. For example, if assigning security to an area in an application, all of the items in the area inherit the security settings of the area. By default, the area inherits security settings from the application. The top of the hierarchy is the network directory or local directory.

**To allow a resource to inherit permissions**

1. In FactoryTalk Administration Console Explorer, right-click the resource, then select Security.

2. In Security Settings, on the Permissions tab, clear Do not inherit permissions.

3. To remove explicit permissions, clear the black check mark next to Allow or Deny. Inherited permissions appear as gray check marks and cannot be removed. However, explicit permissions supersede inherited permissions.

4. Select OK.

**Tip:** Security settings configured for resources apply to all FactoryTalk products in the system in the current FactoryTalk directory. For example, if a user and computer are denied Read access to an area, that user and computer cannot see the area in any of the FactoryTalk products in the system.

See also

- Prevent a resource from inheriting permissions on page 157
- Secure resources on page 137
- Effective permission icons on page 160
- Permissions on page 138

When the chain of inheritance is broken, the resource no longer inherits permissions from its parent resources. For example, when setting up security for an area, selecting Do not inherit permissions stops the area from inheriting permission from the application in which it is located.

**To prevent a resource from inheriting permissions**

1. In FactoryTalk Administration Console Explorer, right-click the resource, then select Security.
2. In Security Settings, on the Permissions tab, select Do not inherit permissions.

3. Do one and select OK:

- To use the inherited permissions that were formerly applied to the resource as explicit permissions, select Copy the current permissions from the parent object to this object. Modify this permissions set as needed. Changes made to the parent object permissions are not applied to this resource after the chain of inheritance is broken.

- To remove all inherited permissions from the resource, select Remove all inherited permissions from this object. Grant explicit permissions to the resource as needed.

When removing all inherited permissions, Read and Configure Security permissions are automatically granted to the Administrators group. Always grant the Administrators group both of these permissions.

**Tip:** Security settings configured for resources apply to all FactoryTalk products in the system in the current FactoryTalk directory. For example, when denying a user and computer Read access to an area, that user and computer cannot see the area in any of the FactoryTalk products in the system.

**See also**

- Allow a resource to inherit permissions on page 157
- Secure resources on page 137
- Effective permission icons on page 160
- Permissions on page 138

**View effective permissions**

To determine what permissions are currently in effect for a resource, use the Effective Permissions tab in Security Settings. View the permissions in effect for:

- a user or group of users, and
- a computer or group of computers

For example, in Security Settings for an area, the Effective Permissions tab can show whether the selected users and computers can read the contents of the area.

To view the permissions in effect for a computer or group of computers, use a FactoryTalk network directory, because a FactoryTalk local directory is restricted to a single computer.
Prerequisites

Viewing effective permissions requires these security permissions for the resource (for example, an application) or the container (for example, an area) the resource is located in:

- Common > Read
- Common > Configure Security

To view effective permissions

1. In FactoryTalk Administration Console Explorer, expand the FactoryTalk network or local directory tree until the resource is visible.

2. Right-click the resource, and select Security.

3. In Security Settings, select the Effective Permissions tab.

4. To test the permissions for a user or user group, under User or group, select Browse (...) and browse for the user or user group.

5. To test the permissions for a computer or a computer group, under Computer or computer group, select Browse (...) and browse for the computer or computer group.

6. Select Update Permissions List to show the permissions currently in effect for the selected users and computers.

The Effective permissions list does not show separate columns for Allow and Deny permissions, and does not distinguish between explicit and inherited permissions. Instead, the presence or absence of a check mark in the Allowed column indicates the permissions in effect on the resource for the selected user and computer, or group:

- If a check mark appears beside an action, the action is allowed, whether explicitly or by inheritance.
- If a check mark does not appear beside an action, the action is denied, whether explicitly or by inheritance.
- If an action category (for example, Common or Alarming) shows a gray check mark, one or more—but not all—of the actions inside the category are allowed. Expand the category to see which actions are allowed or denied.

See also

Permissions on page 138
Effective permission icons

Security Settings indicate which permissions are in effect for an action.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>□</td>
<td>Cleared box beside an action means that no permissions are assigned. If both Allow and Deny are cleared beside an action, Deny is implied for the action. A cleared option shown beside the name of a group of actions, for example, All Actions or Common, means that some of the actions within that group do not have permissions assigned. If collapsed, expand the group to see which actions do not have permissions assigned.</td>
</tr>
<tr>
<td>✔</td>
<td>A black check mark means that Allow or Deny permissions were assigned explicitly.</td>
</tr>
<tr>
<td>□</td>
<td>A gray check mark means that Allow or Deny permissions were inherited.</td>
</tr>
</tbody>
</table>

These examples show how the Allow and Deny columns indicate what permissions were set for the resource.

Inherited permissions

The gray check marks show that Allow permissions are inherited for all actions.

Explicit permissions

If Allow is selected beside All Actions, black check marks appear. This means the inherited values are overridden and Allow on All Actions is explicitly granted. If the inherited permissions change later, the change does affect this security setting.
Explicit Deny permissions without inheritance

In this example, the resource does not inherit permissions from its parent (this illustration shows configuring security for the FactoryTalk network directory, which has no parent). If all actions are set to **Allow**, and then **Deny** beside **Read** is selected:

- **All Actions** and **Common** are cleared. Because they represent groups of actions, the cleared options beside **All Actions** and **Common** mean that not all of the actions within those groups are selected in the **Allow** column. Expand the group to see which actions do not have **Allow** permissions.

- For the **Read** action, **Allow** is cleared.

Explicit Deny permissions with inheritance

In this example, the resource inherits permissions from its parent (for example, an area might inherit permissions from an application). If all actions are set to **Allow**, and **Deny** beside **Read** is selected:

- **All Actions** and **Common** are cleared, but because these options previously inherited permissions, they now contain gray check marks. Expand the group to see which actions do not have **Allow** permissions.

- For the **Read** action, **Allow** is cleared, but because it previously inherited permissions, **Read** now contains a gray check mark. Because explicit permissions take precedence over inherited permissions, these selections indicate that **Read** access is denied.
Using "Do not inherit permissions"

Select Do not inherit permissions to remove all inheritance from the resource. Set permissions for the resource as shown in the previous example.

See also

- Allow a resource to inherit permissions on page 157
- Prevent a resource from inheriting permissions on page 157
- Secure resources on page 137
Chapter 14

Disaster Recovery

Create FactoryTalk backup files to preserve and restore a FactoryTalk system in case of a systems failure. If a FactoryTalk Directory is inaccessible or corrupt, use the FactoryTalk Directory Configuration Wizard to repair it.

For safekeeping and disaster recovery, or to move a FactoryTalk system from one set of computers to another, backup and restore an archive containing one of the following:

- An entire FactoryTalk Directory with all of its applications and its System folder.
- Only an individual application, with or without the System folder. An application archive file typically contains areas (in a network directory), resource grouping information, and references to data servers, device servers, alarm servers, and HMI servers.
- Only a System folder. The System folder includes a list of user, computer, and group accounts, passwords, system policy settings, product policy settings, system security settings, action groups, and alarm and event database definitions.

The backup process creates an archive file that contains only objects and references to objects held within the FactoryTalk Directory. The archive file does not contain project files that are specific to individual products.

FactoryTalk Services Platform 6.10 applies a new encryption algorithm to the backup file for enhanced security. Backups created using FactoryTalk Services Platform 6.10 can only be restored to host computers that are also running FactoryTalk Services Platform 6.10 or later. Backups created using FactoryTalk Services Platform 2.90 or later can be restored onto host computers that are running FactoryTalk Services Platform 6.10.

**Important:** Take care to choose the correct backup options when creating a backup archive. Restoring from the wrong type of backup archive can overwrite existing data that affects all applications.

**See also**

[Back up a FactoryTalk Directory on page 164](#)
Back up a FactoryTalk Directory

Back up a FactoryTalk Directory to move a development FactoryTalk system to a run-time FactoryTalk system, or to create a backup for disaster recovery purposes.

When you back up an entire FactoryTalk Directory, the archive file includes:

- All objects, references to objects held within the FactoryTalk Directory, and the security authority identifier. The archive file does not contain project files that are specific to individual products.
- All applications associated with that directory. Typically an application contains areas (in a network directory), resource grouping information, and references to data servers, device servers, alarm servers, and HMI servers.
- The System folder, which includes a list of user, computer, and group accounts, passwords, system policy settings, product policy settings, system security settings, action groups, and alarm and event database definitions.

Tip:
To back up a FactoryTalk Directory without its security authority identifier, or to back up only the security authority identifier, select Tools > Security Authority Identifier. In Modify Security Authority Identifier, select Backup and follow the on-screen instructions.

Prerequisites

- Obtain the security permissions needed to perform backup and restore operations. Open System > Policies > System Policies, and open User Rights Assignment. Under Backup and Restore > Backup and restore directory contents select Configure Security and verify access permissions have been granted.

To back up a FactoryTalk Directory

1. In FactoryTalk Administration Console Explorer, right-click the Network or Local Directory icon, then select Backup.

2. In Specify archive name, use the default name or type another name for the backup file.

   Tip: It is recommended to not change the default archive name. The default name contains the leading digits of the security authority identifier which allows you to easily identify the archive file associated with a specific directory.

3. In Specify archive location use the default archive location or use Browse to open the Browse for Folder window and specify another location.
4. To encrypt your archive file, select the **Encrypt file contents** check box, and then enter the same passphrase in the **Passphrase** and **Confirm passphrase** fields. If you clear this check box, your backup archive file will not be encrypted or protected.

**Encrypt file contents** is not available if your operating system does not support the proper level of encryption.

**Important:** Remember the passphrase when choosing to encrypt the file contents. The archive file cannot be restored without the correct passphrase.

5. Select **OK**.

Unless a different file name was specified, FactoryTalk Administration Console creates a directory backup file with its current security authority identifier in the default location or in the location specified. If a backup file with the same name already exists in the location selected, the system asks whether to overwrite the existing file.

6. After backing up a directory, perform backups of project files and databases from individual software products that are participating in the FactoryTalk system.

If the applications include:

- **HMI servers**: Back up FactoryTalk View files separately. See FactoryTalk View documentation for help.
- **RSLinx Classic data servers**: Run the RSLinx Backup Restore utility to back up the data server configuration. From the **Windows Start** menu, select **Rockwell Software > RSLinx > Backup Restore Utility**.
- **FactoryTalk Linx servers**: The base configuration of the FactoryTalk Linx server is included in the backup, including redundancy and alarms and events configurations. To retain device, driver, and shortcut configurations, make a copy of the file `RSLinxNG.xml` and keep it with your backup archive. By default the file is located in `C:\ProgramData\Rockwell\RSLinxEnterprise`.
- **FactoryTalk Linx Data Bridge**: Open FactoryTalk Linx Data Bridge, select **File > Export configuration**. Keep the exported file with your backup archive.
- **FactoryTalk Linx Gateway**: Make a copy the `FTLinxGateway.xml` file and keep it with your backup archive. By default the file is located
• **FactoryTalk Linx OPC UA Servers**: If the OPC UA Server configuration includes a user name and password, the backup will restore the password only if restored to the original computer. If the backup is restored to a different computer, the password is not restored and must be entered manually to restore the OPC UA Connector to full operation.

• **FactoryTalk Alarms and Events Logs**: Use Microsoft SQL Server tools to back up and restore database files.

• **FactoryTalk Transaction Manager**: Back up project files using the Configuration menu. See FactoryTalk Transaction Manager documentation for help.

• **FactoryTalk Batch**: Copy the FactoryTalk Batch files back to the same directory locations. See FactoryTalk Batch documentation for help.

• **Other products**: Back up product-specific information separately. See product documentation for help.

**Important:** FactoryTalk Services Platform 6.10 applies a new encryption algorithm to the backup file for enhanced security. Backups created using FactoryTalk Services Platform 6.10 can only be restored to host computers that are also running FactoryTalk Services Platform 6.10 or later. Backups created using FactoryTalk Services Platform 2.90 or later can be restored onto host computers that are running FactoryTalk Services Platform 6.10.

See also

- [Restore a FactoryTalk Directory](#) on page 176
- [Backup](#) on page 172
- [Back up a System folder](#) on page 166
- [Back up an application](#) on page 168
- [Backup and restore options](#) on page 173

**Back up a System folder**

Back up a System folder to create a backup archive that contains:

- The list of user, computer, and group accounts
- Action groups
- Passwords
- Policy settings
- Security settings
• Alarm and event database definitions

Restoring a System folder archive to a FactoryTalk Directory overwrites the contents of the existing System folder with the contents in the backup archive.

Prerequisites

• Obtain the security permissions needed to perform backup and restore operations. Expand System > Policies > System Policies, and open User Rights Assignment.

To back up a System folder

1. In FactoryTalk Administration Console Explorer, right-click the System folder, then select Backup.

2. Use the default name or type another name for the backup file.

3. Use the default archive location or specify another location by selecting Browse, selecting a location, and then selecting OK in the Browse for Folder window.

4. Select a file encryption option:

   • To encrypt your archive, select Encrypt file contents and then enter the same passphrase in the Passphrase and Confirm passphrase fields.

   • To create an archive without encryption, clear Encrypt file contents. This creates a plain text file with no password protection.

   Encrypt file contents will not be available if your operating system does not support the proper level of encryption.

   Important: Remember the passphrase if you choose to encrypt your file contents. The archive file cannot be restored without the correct passphrase.

5. In the Backup window, select OK.

   Unless you specified a different file name, FactoryTalk Administration creates a System.bak file in the default location or in the location you specified. If a backup file with the same name already exists in the location you’ve chosen, the system asks whether you want to overwrite the existing file.
Important: FactoryTalk Services Platform 6.10 applies a new encryption algorithm to the backup file for enhanced security. Backups created using FactoryTalk Services Platform 6.10 can only be restored to host computers that are also running FactoryTalk Services Platform 6.10 or later. Backups created using FactoryTalk Services Platform 2.90 or later can be restored onto host computers that are running FactoryTalk Services Platform 6.10.

See also
- Restore (System folder) on page 193
- Restore a System folder on page 178
- Backup resources on page 173
- Backup on page 172
- Backup and restore options on page 173

Back up an application

An application typically contains areas (in a network directory), resource grouping information, and references to data servers, device servers, alarm servers, and HMI servers.

Back up an application and create an archive file to:

- Restore the application to a FactoryTalk Directory on a different computer
- Duplicate the application with a different name within the same directory

Optionally, include the System folder in the archive. The System folder includes a list of user, computer, and group accounts, passwords, system policy settings, product policy settings, system security settings, action groups, and alarm and event database definitions.

Prerequisites

- Obtain the security permissions needed to perform backup and restore operations. Open System > Policies > System Policies, and double-click User Rights Assignment.

To back up an application

1. In FactoryTalk Administration Console Explorer, right-click the selected application, and select Backup.
2. Use the default name or enter another name for the backup file.
3. Use the default archive location or specify another location by selecting Browse, selecting a location, and then selecting OK in the Browse for Folder window.
4. To back up the application without including the System folder, clear the **Backup System in archive** check box. To include the System folder in the backup, select the **Backup System in archive** check box.

   **Tip:** You can still choose to restore only the application from the backup archive file later even if you include the System folder in the backup.

5. To encrypt your archive file, select the **Encrypt file contents** check box, and then enter the same passphrase in the **Passphrase** and **Confirm passphrase** fields. If you clear this check box, your backup archive file will not be encrypted or protected.

   The **Encrypt file contents** check box will not be available if your operating system does not support the proper level of encryption.

   **Important:** Remember the passphrase if you choose to encrypt your file contents. The archive file cannot be restored without the correct passphrase.

6. In the **Backup** window, select **OK**.

   Unless you specified a different file name, FactoryTalk Administration creates an **ApplicationName.bak** file for the application in the default location, or in the location you specified. If a backup file with the same name already exists in the location you’ve chosen, the system asks whether you want to overwrite the existing file.

7. After backing up an application, back up and restore project files and databases separately from individual software products that are participating in the FactoryTalk system.

   If your applications include:


   - **RSLogix Classic data servers**: Run the RSLogix Backup Restore utility to back up the data server configuration. From the **Windows Start** menu, select **Rockwell Software > RSLogix > Backup Restore Utility**.

   - **FactoryTalk Linx servers**: The base configuration of the FactoryTalk Linx server is included in the backup, including redundancy and alarms and events configurations. To retain device, driver, and shortcut configurations, make a copy of the file `RSLinxNG.xml` and keep it
with your backup archive. By default the file is located in C:\ProgramData\Rockwell\RSLinxEnterprise.

- **FactoryTalk Linx Data Bridge**: Open FactoryTalk Linx Data Bridge, select **File > Export configuration**. Keep the exported file with your backup archive.

- **FactoryTalk Linx Gateway**: Make a copy the **FTLinxGateway.xml** file and keep it with your backup archive. By default the file is located in C:\ProgramData\Rockwell\FactoryTalk Linx Gateway.

- **FactoryTalk Linx OPC UA Servers**: If the OPC UA Server configuration includes a user name and password, the backup will restore the password only if restored to the original computer. If the backup is restored to a different computer, the password is not restored and must be entered manually to restore the OPC UA Connector to full operation.

- **FactoryTalk Alarms and Events Logs**: Use Microsoft SQL Server tools to back up and restore database files.

- **FactoryTalk Transaction Manager**: Back up project files using the **Configuration** menu. See FactoryTalk Transaction Manager documentation for help.

- **FactoryTalk Batch**: Copy the FactoryTalk Batch files back to the same directory locations. See FactoryTalk Batch documentation for help.

- **Other products**: Back up product-specific information separately. See product documentation for help.

**Important**: FactoryTalk Services Platform 6.10 applies a new encryption algorithm to the backup file for enhanced security. Backups created using FactoryTalk Services Platform 6.10 can only be restored to host computers that are also running FactoryTalk Services Platform 6.10 or later. Backups created using FactoryTalk Services Platform 2.90 or later can be restored onto host computers that are running FactoryTalk Services Platform 6.10.

See also

- **Restore (Application)** on page 194
- **Backup and restore options** on page 173
- **Backup** on page 172
- **Update security settings for Networks and Devices** on page 186
- **Update security settings for the FactoryTalk Linx OPC UA Connector** on page 187
Back up a Security Authority identifier

Each FactoryTalk Directory has a unique Security Authority identifier generated during installation. Back up a Security Authority identifier to save the identifier in case of disaster.

Secure controller projects and controllers running secure projects can only be accessed when the FactoryTalk Directory Security Authority identifier matches the identifier saved in the project. This prevents unauthorized access to a controller or controller project if moved or copied to a different FactoryTalk Directory.

Prerequisites

- Obtain the following permissions from System > System Policies> User Rights Assignment:
  - Modify Security Authority Identifier

To back up the security authority identifier

1. In FactoryTalk Administration Console, select Tools > FactoryTalk Security Authority Identifier.
2. In Modify Security Authority Identifier, select Backup.
3. (optional) In Backup, set the backup archive options:
   - **Specify archive name**: Type the name for the backup archive.
   - **Specify archive location**: Type or browse to a path for the backup archive.
   - **Encrypt file contents**: Select to protect the backup archive with a passphrase, then enter the passphrase into the passphrase fields. Clear to save the backup archive as plain text.
4. Select OK.
5. (optional) If prompted, select Yes to overwrite the existing backup archive.
6. In the confirmation window, select OK.
Chapter 14  Disaster Recovery

Important: FactoryTalk Services Platform 6.10 applies a new encryption algorithm to the backup file for enhanced security. Backups created using FactoryTalk Services Platform 6.10 can only be restored to host computers that are also running FactoryTalk Services Platform 6.10 or later. Backups created using FactoryTalk Services Platform 2.90 or later can be restored onto host computers that are running FactoryTalk Services Platform 6.10.

See also

- Restore a Security Authority identifier on page 182
- Generate a Security Authority identifier on page 190
- Modify Security Authority Identifier on page 174

Backup

How do I open Backup?

1. Run FactoryTalk Administration Console.
2. In the Explorer window, right-click the directory icon, an application, or the System folder.
3. On the context menu, click Backup.

Use Backup to specify:

- The name and location of a backup file
- Whether or not to include the System folder in the backup (application backup only)
- Whether or not to encrypt the backup archive
- A passphrase for the encrypted archive, if used

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specify archive name</td>
<td>Use the default archive name or type a name for the archive file. The extension .bak is added automatically. You do not have to type it.</td>
</tr>
<tr>
<td></td>
<td>• By default, an archive file that contains a backup of an entire FactoryTalk Directory (including all applications, all user and computer accounts and groups, passwords, policy settings, and security settings) is named with its current security authority identifier, for example, Network - 72CE2C2E-5175-4C26-98AE-3ABE5AC7F8EC.bak or Local - CS65C77A-4664-4E6C-9779-1EC729B3A8A0.bak. It is recommended that you do not change the default archive name. The default name contains the leading digits of the security authority identifier which allows you to easily identify the archive file associated with a specific directory.</td>
</tr>
<tr>
<td></td>
<td>• By default, an archive file that contains a backup of a System folder (including user and computer accounts and groups, passwords, policy settings, and security settings) is named System.bak.</td>
</tr>
<tr>
<td></td>
<td>• By default, an archive file that contains a backup of a single application is named the same as the application. If you are backing up an application, you can optionally also include the contents of the System folder in the backup archive.</td>
</tr>
<tr>
<td>Specify archive location</td>
<td>Use the default archive location or type the path where you want to save the backup file. Alternatively, select Browse, select a folder, and select OK. The default archive location is C:UsersPublicDocuments.</td>
</tr>
</tbody>
</table>
## Setting Description

### Backup System in archive
The **Backup System in archive** check box is available only if you are backing up an application.
- To include the contents of the System folder in the backup archive, select this check box.
- Choose this option when you want to restore only one application from a FactoryTalk Directory, but want to include all user and computer accounts and groups, passwords, policy settings, and security settings from the original FactoryTalk Directory.
- To back up only the application without the System folder, clear this check box.
- Choose this option when you want to add an application to an existing FactoryTalk Directory without overwriting the settings held in the System folder.

### File Encryption
Choose whether or not to encrypt the archive file. Encrypting the file protects it against unauthorized use.
- The check box will not be available if your operating system does not support the proper level of encryption. To use the file encryption, install your FactoryTalk software on one of the supported operating systems.
- To encrypt file contents, select the **File Encryption** check box.
- To save the archive file without encryption, clear this check box.

### Passphrase
Type a passphrase for the archive file you want to encrypt.
- The passphrase must meet the following requirements:
  - Any alphanumeric character or other characters
  - Minimum length: 0
  - Maximum length: 64

### Confirm passphrase
Type the same passphrase you typed in the **Passphrase** field.

---

**Important:** Remember the passphrase if you choose to encrypt your file contents. The archive file cannot be restored without the correct passphrase.

FactoryTalk Services Platform 6.10 applies a new encryption algorithm to the backup file for enhanced security. Backups created using FactoryTalk Services Platform 6.10 can only be restored to host computers that are also running FactoryTalk Services Platform 6.10 or later. Backups created using FactoryTalk Services Platform 2.90 or later can be restored onto host computers that are running FactoryTalk Services Platform 6.10.

---

### See also

- **Back up an application** on page 168
- **Back up a FactoryTalk Directory** on page 164
- **Back up a System folder** on page 166
- **Backup and restore options** on page 173

### Backup and restore options
Use backup and restore options to select which data in the FactoryTalk Directory should be backed up or restored.
Important: Restoring from the wrong type of backup archive can overwrite existing data that affects all applications. FactoryTalk Services Platform 6.10 applies a new encryption algorithm to the backup file for enhanced security. Backups created using FactoryTalk Services Platform 6.10 can only be restored to host computers that are also running FactoryTalk Services Platform 6.10 or later. Backups created using FactoryTalk Services Platform 2.90 or later can be restored onto host computers that are running FactoryTalk Services Platform 6.10.

<table>
<thead>
<tr>
<th>To backup or restore</th>
<th>Create this type of backup archive</th>
</tr>
</thead>
<tbody>
<tr>
<td>An individual application without the System folder</td>
<td>Application</td>
</tr>
<tr>
<td>Multiple applications without the System folder</td>
<td>Application</td>
</tr>
<tr>
<td>The System folder, without restoring applications</td>
<td>System folder</td>
</tr>
<tr>
<td></td>
<td>• You cannot restore only the System folder from an Application or FactoryTalk Directory archive.</td>
</tr>
<tr>
<td>An individual application and the System folder</td>
<td>Application</td>
</tr>
<tr>
<td></td>
<td>• Select <strong>Backup system in archive</strong>. Selecting this item overwrites the contents of the System folder in the FactoryTalk Directory, including accounts, security settings, and policy settings.</td>
</tr>
<tr>
<td>Multiple applications and the System folder</td>
<td>Application</td>
</tr>
<tr>
<td></td>
<td>• Create separate archives for each application, and select <strong>Backup system in archive</strong> in at least one of the archives.</td>
</tr>
<tr>
<td></td>
<td>• If the applications come from different FactoryTalk Directories, remember that you can restore only one System folder into a single FactoryTalk Directory.</td>
</tr>
<tr>
<td>An entire FactoryTalk Directory including all applications, the System folder, and the security authority identifier</td>
<td>FactoryTalk Directory</td>
</tr>
<tr>
<td></td>
<td>• Cannot be used to restore individual applications, or only the System folder.</td>
</tr>
<tr>
<td>The FactoryTalk Directory security authority identifier only</td>
<td>FactoryTalk Directory</td>
</tr>
<tr>
<td></td>
<td>• Use <strong>Modify Security Authority Identifier</strong> to create this backup archive, which contains only the security authority identifier.</td>
</tr>
<tr>
<td></td>
<td>• To restore this backup archive, use <strong>Modify Security Authority Identifier</strong>.</td>
</tr>
<tr>
<td></td>
<td>• It is strongly recommended to make a backup of the directory with the new identifier after restoring the security authority identifier.</td>
</tr>
</tbody>
</table>

See also

- [Back up a FactoryTalk Directory](#) on page 164
- [Back up an application](#) on page 168
- [Back up a System folder](#) on page 166
- [Back up a Security Authority identifier](#) on page 171
- [Backup](#) on page 172

**Modify Security Authority Identifier**

How do I open Modify Security Authority Identifier?
In FactoryTalk Administration Console, select **Tools > FactoryTalk Security Authority Identifier**.

Use **Modify Security Authority Identifier** to generate, back up, or restore the unique Security Authority Identifier for a FactoryTalk Directory. The **User Rights Assignment > Modify Security Authority Identifier** permission is required to generate, back up, or restore the identifier.

Secure controller projects and controllers running secure projects can only be accessed when the FactoryTalk Directory Security Authority identifier matches the identifier saved in the project. This prevents unauthorized access to a controller or controller project if moved or copied to a different FactoryTalk Directory.

**See also**

- [Generate a Security Authority identifier](#) on page 190
- [Back up a Security Authority identifier](#) on page 171
- [Restore a Security Authority identifier](#) on page 182

**Restore a FactoryTalk system**

After backing up an entire FactoryTalk Directory, individual application, System folder, or security authority identifier in an archive file, restore these resources to:

- Recover from a data loss
- Move a development FactoryTalk system to a run-time system
- Copy FactoryTalk Directory components to another computer

Restore the following:

- An entire FactoryTalk Directory
- Only an individual application, with or without the System folder
- Only a System folder
Important:

- Choose the correct backup options when creating a backup archive. Restoring from the wrong type of backup archive overwrites existing data that affects all applications.
- An archive file created using FactoryTalk Services Platform 6.10 cannot be restored on a computer running an earlier version of FactoryTalk Services Platform.
- Archive files created using FactoryTalk Services Platform 2.90 or later can be restored on a computer running FactoryTalk Services Platform 6.10.

See also

- Restore a FactoryTalk Directory on page 176
- Restore an application on page 180
- Restore a System folder on page 178
- Verify security settings after restoring a FactoryTalk system on page 183
- Backup and restore options on page 173

**Restore a FactoryTalk Directory**

To move an entire FactoryTalk system from one computer to another, restore a FactoryTalk Directory backup archive. As a safeguard, create a backup archive of the directory first, before performing a restore operation.

Important:

- *Do not restore* an archive file created under FactoryTalk Services Platform 2.10 (CPR 9) or later into a FactoryTalk Directory that is currently running FactoryTalk Automation Platform 2.00 (CPR 7). This restore scenario is not supported and may have unexpected results.
- A FactoryTalk Directory archive file that is automatically created when you install or upgrade FactoryTalk Services Platform 2.50 or later can only be restored on the same computer.
- An archive file created using FactoryTalk Services Platform 6.10 cannot be restored on a computer running an earlier version of FactoryTalk Services Platform.
- Archive files created using FactoryTalk Services Platform 2.90 or later can be restored on a computer running FactoryTalk Services Platform 6.10.

Restoring an archive created in an earlier version of the FactoryTalk platform into a later version automatically updates the data in the System folder to be compatible with the later version, while retaining the original data from the archive.

For example, restoring an archive created under FactoryTalk Services Platform 2.9 (CPR 9) into a FactoryTalk Directory upgraded to FactoryTalk Services Platform 6.10 (CPR 11) or later. The restore process retains the original user accounts and all system-wide security and policy settings, but also updates the System folder to include new options and policies.
Prerequisites

1. Obtain the security permissions needed to perform backup and restore operations. Open System > Policies > System Policies, and then double-click User Rights Assignment.

2. Shut down all FactoryTalk software products, components, and services, except FactoryTalk Administration Console and FactoryTalk Help.

3. Log on to the directory to restore into, and create a backup archive of the existing directory.

To restore a FactoryTalk Directory

1. In FactoryTalk Administration Console Explorer, verify that the applications located in the restore directory are not currently expanded or being used by another product or component. Close all applications held in the directory.

2. Right-click Network or Local, and select Restore.

3. In Restore, select Browse, select the backup file (*.bak) to restore, and select Open.

   By default, an archive file for a network directory or local directory is named with its current security authority identifier, for example, Network - 72CE2C2E-5175-4C26-98AE-3ABE5AC7F8EC.bak or Local - C565C77A-4664-4E6C-9779-1EC729B3A8A0.bak.

4. Select Next.

5. If the backup file is encrypted, Restore Backup File opens. Type the passphrase used during the backup operation.

   **Important:** An error message opens if the passphrase entered is not correct. Enter the passphrase again. If the wrong passphrase is entered three times, Restore Backup File closes. Select the archive file and try again.

   After you enter the correct passphrase, Restore shows the type of archive and what applications are contained in the archive. The entire FactoryTalk Directory will be restored, including all applications, all user and computer accounts and groups, passwords, policy settings, security settings, and the security authority identifier.

6. To restore the FactoryTalk Directory contained in the selected archive, select Finish.
7. After restoring a FactoryTalk Directory, verify FactoryTalk security settings, and perform any follow-up tasks, such as copying in application configuration .xml files and updating passwords.

8. If hosting servers on different computers than those configured in the restored directory, the following additional steps are required:
   - Add the new computers into the FactoryTalk Directory.
   - Change the server host computer names on the server property pages.
   - Restart the computers hosting FactoryTalk Linx and Tag Alarm and Event Servers. This is necessary to ensure the alarm servers start up.

See also

Verify security settings after restoring a FactoryTalk system on page 183
Update security settings for the FactoryTalk Linx OPC UA Connector on page 187
Add a computer on page 59
Back up a FactoryTalk Directory on page 164

Restoration of a System folder

To overwrite the contents of the existing System folder with the contents in the backup archive, restore an archive that contains only a System folder.

A System folder archive includes the following:
   - The list of user, computer, and group accounts
   - Action groups
   - Passwords
   - Policy settings
   - Security settings
   - Alarm and event database definitions

Restoring an archive created in an earlier version of the FactoryTalk platform into a later version automatically updates the data in the System folder to be compatible with the later version, while retaining the original data from the archive.

For example, an archive created under FactoryTalk Services Platform 2.90 (CPR 9) restored into a FactoryTalk Directory that has been upgraded to FactoryTalk Services Platform 6.10 (CPR 11) or later. The restore process retains the original
user accounts and all system-wide security and policy settings, but also updates the System folder to include new options and policies.

**Prerequisites**

1. Obtain the security permissions needed to perform backup and restore operations. Open **System > Policies > System Policies**, and then double-click **User Rights Assignment**.
2. Create the system-only backup archive.
3. Shut down all FactoryTalk software products, components, and services, except FactoryTalk Administration Console and FactoryTalk Help.
4. Log on to the directory you want to restore into, and create a backup archive of the existing directory.

**Important:** Do not restore an archive file created under FactoryTalk Services Platform 2.10 (CPR 9) or later into a FactoryTalk Directory that is currently running FactoryTalk Services Platform 2.00 (CPR 7). This restore scenario is not supported and may have unexpected results.

An archive file created using FactoryTalk Services Platform 6.10 cannot be restored on a computer running an earlier version of FactoryTalk Services Platform.

Archive files created using FactoryTalk Services Platform 2.90 or later can be restored on a computer running FactoryTalk Services Platform 6.10.

**To restore a System folder**

1. In FactoryTalk Administration Console **Explorer**, right-click **Network** or **Local**, and select **Restore**.
2. Select **Browse**, and then select the backup archive file to restore. The default name is **System.bak**.
3. Select **OK** to close the browse window, and then select **Next**.
4. If the backup file is encrypted, **Restore Backup File** opens. Type the passphrase that was used during the backup operation.

**Important:** An error message opens if the passphrase entered is not correct. Enter the passphrase again. If the wrong passphrase is entered three times, **Restore Backup File** closes. Select the archive file and try again.

5. After entering the correct passphrase, select **Finish** to restore the System folder.
6. After restoring the System folder, back up and restore project files and databases from individual software products.
7. Verify security settings, and perform any follow-up tasks.

See also

- Verify security settings after restoring a FactoryTalk system on page 183
- Backup and restore options on page 173
- Back up a System folder on page 166

**Restore an application**

To restore an application from one computer to another, or to copy an application within the same directory, restore an application. If the System folder was backed up with the application, choose whether or not to restore it.

When restoring an application without the System folder:

- Any references are broken from the application to objects that do not exist in the installed System tree, for example, network or device addresses.
- Security does not work for user accounts, user groups, and computers that do not exist in the installed System folder.

**Important:**
- Do not restore an archive file, created under FactoryTalk Services Platform 2.10 (CPR 9) or later, into a FactoryTalk Directory that is currently running FactoryTalk Automation Platform 2.00 (CPR 7). This restore scenario is not supported and may have unexpected results.
- An archive file created using FactoryTalk Services Platform 6.10 cannot be restored on a computer running an earlier version of FactoryTalk Services Platform.
- Archive files created using FactoryTalk Services Platform 2.90 or later can be restored on a computer running FactoryTalk Services Platform 6.10.

**Prerequisites**

1. Obtain the security permissions needed to perform backup and restore operations. Open System > Policies > System Policies, and then double-click User Rights Assignment.

2. Create the application archive, with or without a System folder.

3. Shut down all FactoryTalk software products, components, and services, except FactoryTalk Administration Console and FactoryTalk Help.

4. Log on to the directory you want to restore into, and create a backup archive of the existing directory.
To restore an application

1. In FactoryTalk Administration Console Explorer, right-click Network or Local, and select Restore.

2. In Restore, select Browse, and then select the backup archive file (ApplicationName.bak) to restore. Select OK, then select Next.

3. If the backup file is encrypted, Restore Backup File opens. Type the passphrase that was used during the backup operation.

   **Important:** An error message opens if the passphrase entered is not correct. Enter the passphrase again. If the wrong passphrase is entered three times, Restore Backup File closes. Select the archive file and try again.

4. Restore shows information about the application. Choose one of the following restore options:

   - Select Restore System. This overwrites user, computer, and group accounts, passwords, policy settings, and security settings for all applications in the FactoryTalk Directory.
   - Clear Restore System. If restoring an application to a different directory or to a different computer, manually recreate security permissions for FactoryTalk users and groups in the restored application.

5. To restore the application with its original name, select Finish. To restore an application with a different name, select the Restore into a new application named check box, type the name, and then select Finish.

   If a different name was entered, the system leaves the original application intact and restores the backup as a new application.

6. If restoring an application without the System folder:

   - Restore references from the application to objects that do not exist in the installed System tree, either by adding these items manually or modifying the application to use the objects that are available.
   - Manually reset any existing security settings in the restored application to reference users, user groups, computers, and computer groups defined in the current System folder.

7. If restoring an application with its System folder, verify that the security settings managed through the System folder are correct, and make edits as needed.
8. If restoring an application that includes a FactoryTalk Linx OPC UA Server that requires authentication, verify that the security settings on the **OPC UA Servers** properties page are correct and make edits as needed.

9. If restoring a FactoryTalk Linx server, copy the appropriate configuration .xml file into the product’s ProgramData folder (by default, C:\ProgramData\Rockwell\<product name>)

- FactoryTalk Linx - RSLinxNG.xml
- FactoryTalk Linx Gateway - FTLinxGateway.xml

10. If restoring a FactoryTalk Linx Data Bridge, open FactoryTalk Linx Data Bridge, select **File > Import configuration** and browse to the location where you stored the exported configuration file.

**See also**

- Verify security settings after restoring a FactoryTalk system on page 183
- Update security settings for the FactoryTalk Linx OPC UA Connector on page 187
- Back up an application on page 168
- Restore a FactoryTalk system on page 175

**Restore a Security Authority identifier**

Each FactoryTalk Directory has a unique Security Authority identifier generated during installation. Restore a Security Authority identifier to replace the current identifier with an identifier from a backup file.

Secure controller projects and controllers running secure projects can only be accessed when the FactoryTalk Directory Security Authority identifier matches the identifier saved in the project. This prevents unauthorized access to a controller or controller project if moved or copied to a different FactoryTalk Directory.

**Important:** After restoring a new Security Authority identifier, controllers and controller projects secured with the previous identifier cannot be accessed.

**Prerequisites**

1. Obtain the following permissions from **System > System Policies> User Rights Assignment**:

- Modify Security Authority Identifier

2. Back up the FactoryTalk Directory.
3. Use Logix Designer to remove security from any controllers and controller projects in the FactoryTalk Directory.

4. Shut down all FactoryTalk software products, components, and services except FactoryTalk Administration Console.

To restore the security authority identifier

1. In FactoryTalk Administration Console, select Tools > FactoryTalk Security Authority Identifier.

2. In Modify Security Authority Identifier, select Restore.

3. In Restore, select Browse (...) to specify the archive to restore, then select Next.

   By default, an archive file for a security authority identifier is named with that identifier. For example, Network - 72CE2C2E-5175-4C26-98AE-3ABE5AC7F8EC.bak or Local - C565C77A-4664-4E6C-9779-1EC729B3A8A0.bak.

4. (optional) If the backup file was encrypted, in Restore Backup File, type the passphrase to unlock the backup file, then click select OK.

5. In Restore, select Restore security authority identifier only, then select Finish.

6. (optional) Use Logix Designer to add security to any controllers and controller projects in the FactoryTalk Directory.

See also

- Back up a Security Authority identifier on page 171
- Generate a Security Authority identifier on page 190
- Modify Security Authority Identifier on page 174

Verify security settings after restoring a FactoryTalk system

After restoring a FactoryTalk Directory backup archive, verify the FactoryTalk Directory security settings on the new FactoryTalk system meet your requirements, and make adjustments as needed.

Depending upon your FactoryTalk configuration, do one or more of the following tasks after restoring the FactoryTalk Directory:

- Update computer accounts in the network directory
- Recreate Windows-linked user accounts
- Update Windows-linked user groups
- Update security settings for Networks and Devices
- Update security settings for FactoryTalk Linx OPC UA Connector
- Restore database connections

See also

- Update computer accounts in the network directory on page 184
- Recreate a Windows-linked user account on page 185
- Update Windows-linked user groups on page 186
- Update security settings for Networks and Devices on page 186
- Restore database connections on page 187

**Update computer accounts in the network directory**

After restoring any backup archive that includes a System folder, update computer accounts to allow access to the network directory.

If the system policy **Require computer accounts for all client machines** is enabled, then only client computers that have been added to the list of computers in the network directory can access that directory. When a backup archive is restored, the directory automatically adds the computer on which the network directory server resides, and the client computer from which the restore operation was performed, to the System folder in the network directory.

**To update computer accounts in the network directory**

1. Log on to FactoryTalk Administration Console as administrator on either the network directory server computer or the client computer where the restore was performed.

2. Rename existing computer accounts from the old domain to easily map them to computers on the new domain. This retains any security settings that were applied to the computer accounts in the old domain.

3. Delete computer accounts that no longer exist in the new domain, and that do not map to computers in the new domain.

4. Add computer accounts to allow computers on the network access to the restored network directory.
Tip: If you delete a computer account and then recreate it, its security settings are lost. To map computers from one domain to another, rename the computer accounts rather than deleting and recreating them.

See also

- Edit or view computer properties on page 61
- Delete a computer on page 60
- Add a computer on page 59
- Verify security settings after restoring a FactoryTalk system on page 183

Recreate a Windows-linked user account

When using individual Windows-linked user accounts, recreate these accounts when restoring your FactoryTalk Directory to a new FactoryTalk system.

Important: Only Windows-linked user group accounts move to a new domain, individual Windows-linked user accounts do not move. This allows you to retain all of the security permissions for the group.

Prerequisites

- Restore the FactoryTalk Directory on the run-time network.
- Complete any follow-up tasks needed to recreate the development FactoryTalk Directory on the run-time network.

To recreate a Windows-linked user account

1. In FactoryTalk Administration Console Explorer, expand System > Policies > System Policies, and double-click Security Policy.

2. Expand Account Policy Settings, then select Show deleted accounts in user list. Enable this setting.

3. Delete the old account.

4. Create the new account.

5. Recreate all the security permissions for the new account. Choose one of the following:
• Add the user account to a group that already has security settings defined for it

• Create permissions for a user account when securing a resource

See also

Update Windows-linked user groups on page 186

Delete a user account on page 48

Add a Windows-linked user account on page 45

Add accounts to a FactoryTalk user group on page 57

Verify security settings after restoring a FactoryTalk system on page 183

Update Windows-linked user groups

When the System folder is restored to a new Windows domain, Windows-linked user groups that existed in the original domain may no longer exist in the new domain.

Change the original Windows-linked groups to groups that exist in the new domain. Security settings that refer to the Windows-linked groups in the new domain update automatically. Move your applications to a different domain without having to change or recreate each user account separately.

If the system uses local workstation accounts as part of a Windows workgroup, Windows-linked user accounts lose their security settings after the System folder is restored.

See also

Update security settings for Networks and Devices on page 186

Update security settings for Networks and Devices

After restoring an entire FactoryTalk Directory, update security settings for Networks and Devices to secure them in the new domain.

The Networks and Devices tree displays information about the networks and devices connected to the local computer. The contents of the Networks and Devices tree are not included in the backup archive, however the backup archive does include any security settings defined for networks and devices.

If an archive is restored on a computer connected to the same networks and devices using the same drivers or logical names, the security settings restored from the archive file take effect. Check to make sure security settings are accurate for the resources in the new FactoryTalk system, and make edits as needed.
To update security settings for Networks and Devices

1. In FactoryTalk Administration Console Explorer, select Networks and Devices to view the networks and devices in your FactoryTalk system.

   Tip: To check the security settings for a network or device, right-click its icon, then select Security. Use Security Settings to view permissions by user or by action, and to see if permissions are inherited from higher levels in the FactoryTalk directory tree.

2. Review and edit user action permissions as needed.

See also

- Restore database connections on page 187
- Verify security settings after restoring a FactoryTalk system on page 183

Update security settings for the FactoryTalk Linx OPC UA Connector

After restoring an entire FactoryTalk Directory on a replacement or re-imaged computer, update security settings for the FactoryTalk Linx OPC Connector if the OPC UA Server requires authentication. The user credentials for the OPC UA Server are encrypted and tied to the private key of the original computer, so replacing the computer removes the stored credentials.

If an archive is restored on the same computer and the computer is not re-imaged, the credentials are included in the restore, but should be verified to ensure proper operation.

To update security settings for the FactoryTalk Linx OPC UA Connector

1. In FactoryTalk Administration Console Explorer, right-click a FactoryTalk Linx OPC UA Connector, then click Properties.

2. Click OPC UA Servers.

3. Select a server from the OPC UA Servers list to edit its properties

4. Under Authentication Settings review and edit the user name and password as needed.

See also

- Restore database connections on page 187
- Verify security settings after restoring a FactoryTalk system on page 183

Restore database connections

If the FactoryTalk system being restored includes Microsoft SQL Server databases for logging historical data, including FactoryTalk Alarms and Events logs, the connection to the database must be restored to re-establish a connection between a
database definition, held in the directory, and its associated Microsoft SQL Server database.

**To restore database connections**

1. On any computer in the network directory, run FactoryTalk Administration Console.

2. From Explorer, open System > Connections > Databases.

3. Double-click the database definition to open its properties, update the SQL Server host computer name if it has changed, and then select **OK**.

   The system checks for database tables and creates them, if they do not exist.

**See also**

- [Verify security settings after restoring a FactoryTalk system](#) on page 183
- [Restore a FactoryTalk system](#) on page 175

---

**Restore an earlier system after upgrading FactoryTalk platform software**

An archive file created using FactoryTalk Services Platform 6.10 cannot be restored on a computer running an earlier version of FactoryTalk Services Platform. You must use the archive file created before you installed FactoryTalk Services Platform 6.10 to revert to a previous version.

Before restoring to an earlier system, keep the following in mind:

- Following the instructions in this topic overwrites all data in the FactoryTalk Directory and returns it to the state it was in before upgraded. For example, any applications, security settings, or system policies will be lost. If you want to keep any of this data, back up the network directory and local directory now.

- When reverting from FactoryTalk Services Platform 2.10 (CPR 9) or later to an earlier version of the platform, you must restore backup archives for both the network directory and the local directory, even if you plan to use only one of the directories.

- If you upgraded to FactoryTalk Services Platform version 2.10 (CPR 9) or later, backups of the earlier version of the local directory and network directory were automatically created. You can use those backups to revert to an earlier version.

- Do not restore an archive file created with FactoryTalk Services Platform 2.10 (CPR 9) or later into a FactoryTalk Directory that is running FactoryTalk Services Platform 2.00 (CPR 7). This is not supported and may have unexpected results.
As part of re-installing an earlier version of FactoryTalk Services Platform or FactoryTalk Automation Platform, you will need to enter the FactoryTalk administrator user name and passwords that were saved in the backup archive of the FactoryTalk Directory.

To restore an earlier system after upgrading FactoryTalk platform software

1. Uninstall all FactoryTalk software products that are incompatible with the version of the FactoryTalk platform you plan to use.
   a. To verify the version of the FactoryTalk platform software that a product requires, see the product’s installation documentation.
   b. Go to Control Panel > Uninstall a program or Programs and Features.
   c. Uninstall FactoryTalk Services Platform.
   d. Uninstall Windows Firewall Configuration Utility.

2. Restart your computer.

3. Delete the folders C:\ProgramData\Rockwell\RNAServer and C:\ProgramData\Rockwell\RNAClient.

4. Install the version of the FactoryTalk platform software you plan to use. If the version is 2.10 (CPR 9) or later, skip to the next step after installation. If the version is 2.00 (CPR 7), do the following:
   - If prompted, enter a FactoryTalk administrator user name and password for each directory.

5. Install earlier versions of all software products that are compatible with the version of the FactoryTalk platform software you plan to use. To verify the version of the FactoryTalk platform software that a product requires, see the product’s installation documentation.

6. Run FactoryTalk Administration Console and log on to the Local Directory. In Explorer, right-click the Local icon and then restore a local backup archive created with the earlier version of the FactoryTalk platform software.

7. Select File > Log Off to log off the local directory, and then log on to the network directory. Right-click the Network icon and then restore a
network backup archive created with the earlier version of the FactoryTalk platform software.

See also

Restore a FactoryTalk system on page 175

Generate a Security Authority identifier

Each FactoryTalk Directory has a unique Security Authority identifier generated during installation. Generate a Security Authority identifier to change the Security Authority identifier assigned to the FactoryTalk Directory.

Secure controller projects and controllers running secure projects can only be accessed when the FactoryTalk Directory Security Authority identifier matches the identifier saved in the project. This prevents unauthorized access to a controller or controller project if moved or copied to a different FactoryTalk Directory.

Important: After generating a new Security Authority identifier, controllers and controller projects secured with the previous identifier cannot be accessed.

Prerequisites

1. Obtain the following permissions from System > System Policies> User Rights Assignment:
   - Modify Security Authority Identifier
2. Back up the FactoryTalk Directory.
3. Use Logix Designer to remove security from any controllers and controller projects in the FactoryTalk Directory.
4. Shut down all FactoryTalk software products, components, and services except FactoryTalk Administration Console.

To generate a Security Authority identifier

1. In FactoryTalk Administration Console, select Tools > FactoryTalk Security Authority Identifier.
2. In Modify Security Authority Identifier, select Generate ID.
3. In the confirmation window, select Yes.
4. (optional) select Backup to back up the current directory with the new identifier.
5. Select Close.
6. (optional) Use Logix Designer to add security to any controllers and controller projects in the FactoryTalk Directory.

See also

- Back up a Security Authority identifier on page 171
- Restore a Security Authority identifier on page 182
- Modify Security Authority Identifier on page 174

**Restore**

How do I open Restore?

1. Run FactoryTalk Administration Console.
2. At the top of the Explorer window, right-click the Directory icon.
3. On the context menu, click **Restore**.

Use **Restore** to specify the name of the backup file to use to restore all or part of a FactoryTalk Directory.

Select one of these archive types:

- A full FactoryTalk Directory backup archive. This will be named with its security authority identifier (for example, *Network - 72CE2C2E-5175-4C26-98AE-3ABE5AC7F8EC.bak* or *Local - C565C77A-4664-4E6C-9779-1EC729B3A8A0.bak*). It contains all applications, and all user and computer accounts and groups, passwords, policy settings, and security settings.

- A System folder archive. A System folder archive contains a backup of a System folder, including user and computer accounts and groups, passwords, policy settings, and security settings. It is named **System.bak** by default.

- An application archive. This archive contains a backup of the application, and may contain a backup of the System folder. By default, an application archive file has the same name as the application.

Before restoring an archive file, shut down all FactoryTalk software products, components, and services, except FactoryTalk Administration Console and FactoryTalk Help, then create a backup archive of the target directory before continuing with the restore process.

An archive file created under FactoryTalk Automation Platform 2.00 (CPR 7) and restored into a FactoryTalk Directory that has been upgraded to FactoryTalk Services Platform 2.10 (CPR 9) or later automatically updates the data in
the System folder to be compatible with FactoryTalk Services Platform 2.10 or later, while leaving the original data unchanged.

**Important:**
- Do not restore an archive file created under FactoryTalk Services Platform 2.10 (CPR 9) or later into a FactoryTalk Directory that is running FactoryTalk Automation Platform 2.00 (CPR 7). This restore scenario is not supported and may have unexpected results.
- An archive file created using FactoryTalk Services Platform 6.10 cannot be restored on a computer running an earlier version of FactoryTalk Services Platform.
- Archive files created using FactoryTalk Services Platform 2.90 or later can be restored on a computer running FactoryTalk Services Platform 6.10.

**See also**
- [Restore a FactoryTalk Directory](#) on page 176
- [Restore a System folder](#) on page 178
- [Restore an application](#) on page 180
- [Verify security settings after restoring a FactoryTalk system](#) on page 183

**Restore (FactoryTalk Directory)**

How do I open Restore?

1. Run FactoryTalk Administration Console.
2. At the top of the Explorer window, right-click the Directory icon.
3. On the context menu, click Restore.

After selecting a FactoryTalk Directory archive to restore, verify the restoration settings are correct to finish the restore operation. If this is not the correct backup archive, select Cancel to exit or Back to select a different archive file.

Backup files that are created automatically when upgrading to FactoryTalk Services Platform 2.50 or later can only be restored on the same computer.

**Important:**
- Do not restore an archive file created under FactoryTalk Services Platform 2.10 (CPR 9) or later into a FactoryTalk Directory that is running FactoryTalk Automation Platform 2.00 (CPR 7). This restore scenario is not supported and may have unexpected results.
- An archive file created using FactoryTalk Services Platform 6.10 cannot be restored on a computer running an earlier version of FactoryTalk Services Platform.
- Archive files created using FactoryTalk Services Platform 2.90 or later can be restored on a computer running FactoryTalk Services Platform 6.10.
### Setting Description

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archive name</td>
<td>The name of the backup archive file to restore.</td>
</tr>
<tr>
<td>Archive type</td>
<td>Identifies the type of information held within the backup archive file.</td>
</tr>
<tr>
<td>FactoryTalk Directory</td>
<td>Identifies an archive file that contains the contents of an entire directory, including all applications and the System folder.</td>
</tr>
</tbody>
</table>
**Important:** Restoring the System folder overwrites all user and computer accounts and groups, passwords, policy settings, and security settings for all applications in the FactoryTalk Directory. |
| Application(s)  | Lists the names of the applications held in the backup archive file. When you restore an entire directory, all of the applications included in that directory are also restored. |
| Restore         | Only appears when an application is open in the FactoryTalk Directory, which prevents a full restore. If hidden, the entire FactoryTalk Directory will be restored. Select which portions of the FactoryTalk Directory to restore:         |
| Restore directory contents only | Restores applications, users, computers, groups, passwords, policies, and security settings. The security authority identifier is not restored. |
| Restore security authority identifier only | Only restores the security authority identifier. Applications, users, computers, groups, passwords, policies, and security settings are not restored. |
|                 | Back up your directory and remove the old bindings from all controllers and controller projects before continuing. Backup the directory with the new identifier after the restore process is complete. |

**Tip:** After restoring from a backup archive, manually back up and restore project files and databases from other software products participating in the FactoryTalk system, and check security settings and computer accounts.

**See also**

[Restore a FactoryTalk Directory on page 176](#)

### Restore (System folder)

How do I open Restore?

1. Run FactoryTalk Administration Console.

2. At the top of the Explorer window, right-click the Directory icon.

3. On the context menu, click Restore.

After selecting a system-only archive file, Restore displays the archive name and the archive type.

Restoring a System folder moves the following system-wide settings from one FactoryTalk Directory to another:

- The list of user, computer, and group accounts
- Action groups
- Passwords
Review the following settings before selecting **Finish** to restore a System folder.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archive name</td>
<td>The name of the backup archive file to restore.</td>
</tr>
<tr>
<td>Archive type</td>
<td>Identifies the type of information held within the backup archive file.</td>
</tr>
<tr>
<td>System Only</td>
<td>Restoring the System folder overwrites all user and computer accounts and groups, passwords, policy settings, and security settings for all applications in the FactoryTalk Directory.</td>
</tr>
<tr>
<td>Application(s)</td>
<td>(none) - Confirms that applications are not included in the backup archive to restore.</td>
</tr>
</tbody>
</table>

**See also**

- [Restore a System folder on page 178](#)
- [Backup and restore options on page 173](#)

**Restore (Application)**

How do I open Restore?

1. Run FactoryTalk Administration Console.
2. At the top of the Explorer window, right-click the Directory icon.
3. On the context menu, click **Restore**.

After selecting a FactoryTalk Directory archive to restore, verify the restoration settings are correct to finish the restore operation. If this is not the correct backup archive, select **Cancel** to exit or **Back** to select a different archive file.

If the **System** folder was backed up with the application, choose whether to restore it along with the application.

Backup files that are created automatically when upgrading to FactoryTalk Services Platform 2.50 or later can only be restored on the same computer.
Important:

- Do not restore an archive file created under FactoryTalk Services Platform 2.10 (CPR 9) or later into a FactoryTalk Directory that is running FactoryTalk Automation Platform 2.00 (CPR 7). This restore scenario is not supported and may have unexpected results.

- An archive file created using FactoryTalk Services Platform 6.10 cannot be restored on a computer running an earlier version of FactoryTalk Services Platform.

- Archive files created using FactoryTalk Services Platform 2.90 or later can be restored on a computer running FactoryTalk Services Platform 6.10.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archive name</td>
<td>The name of the backup archive file to be restored. By default, the archive name is ApplicationName.bak file.</td>
</tr>
<tr>
<td>Archive type</td>
<td>Identifies the type of information held within the backup archive file.</td>
</tr>
<tr>
<td><em>Application and System</em></td>
<td>Identifies an archive file that contains both an application and a System folder.</td>
</tr>
<tr>
<td><em>Application</em></td>
<td>Identifies an archive file that contains only an application.</td>
</tr>
<tr>
<td>Application(s)</td>
<td>The name of the application or applications held in the backup archive file.</td>
</tr>
<tr>
<td>Restore System</td>
<td>If the backup archive file includes a System folder, this option is available.</td>
</tr>
<tr>
<td><em>To restore the application</em></td>
<td>To restore the application and the System folder, select Restore System. Restoring the System folder overwrites all user and computer accounts, passwords, policy settings, and security settings for all applications in the FactoryTalk Directory.</td>
</tr>
<tr>
<td><em>To restore the application</em></td>
<td>To restore the application without restoring the System folder, clear Restore System. Restoring the System folder overwrites all user and computer accounts, passwords, policy settings, and security settings for all applications in the FactoryTalk Directory.</td>
</tr>
<tr>
<td><em>When restoring an application</em></td>
<td>When restoring an application without its associated System folder to a different directory or to a different computer, security permissions for FactoryTalk users and groups need to be manually recreated in the restored application.</td>
</tr>
<tr>
<td>Restore into a new application named:</td>
<td>Choose whether to overwrite an existing application or create a new application.</td>
</tr>
<tr>
<td><em>To restore the contents</em></td>
<td>To restore the contents of the backup archive file into an application with a new name, select Restore into a New Application Named, then enter a unique name. When Finish is selected, the system leaves the original application intact and restores the backup archive as a new application in the directory. When both applications are the same, it copies the archived application into the directory.</td>
</tr>
<tr>
<td><em>To restore an existing</em></td>
<td>To restore an existing application with its original name, clear Restore into a New Application Named. When Finish is selected, the system confirms to overwrite the existing application of the same name. Select Yes to restore the application.</td>
</tr>
</tbody>
</table>

See also

Restore an application on page 180

**Restore Backup File**

Use **Restore Backup File** to enter the passphrase which was used during the archive file backup operation. The archive file cannot be restored without the correct passphrase.

The passphrase must meet the following requirements:
Any alphanumeric character or other characters
- Minimum length: 0
- Maximum length: 64

An error message opens if the passphrase you entered is not correct. Enter the passphrase again. If the wrong passphrase is entered three times, **Restore Backup File** closes. Select the archive file and try again.

See also

- [Restore (FactoryTalk Directory)](page-192)
- [Restore an application](page-180)
- [Restore a System folder](page-178)
- [Restore a Security Authority identifier](page-182)

**FactoryTalk Directory Configuration Wizard**

How do I run the FactoryTalk Directory Configuration Wizard?

1. On the computer where FactoryTalk Services Platform is installed, log on to Windows with a user account that is a member of the local Windows Administrators group.

2. Click **Start > All Programs > Rockwell Software > FactoryTalk Tools > FactoryTalk Directory Configuration Wizard**.

FactoryTalk Directory products share a common address book, finding and providing access to plant floor resources, such as data tags and graphic displays.


Run the FactoryTalk Directory Configuration Wizard if:

- An error occurs while installing the FactoryTalk Services Platform, or a message displays instructing to run the wizard manually.

- A valid FactoryTalk Administrator account could not be found for the directory during an upgrade of an existing FactoryTalk Directory from FactoryTalk Automation Platform version 2.0.

- If FactoryTalk Services Platform was installed from a remote client (such as Remote Desktop Services). The FactoryTalk Directory cannot be
configured from a remote client. The FactoryTalk Directory Configuration Wizard must be run at the Windows console on the computer.

- The FactoryTalk administrator account in the network directory or local directory is not accessible. Running the wizard resets a locked administrator account, or changes an expired password for the administrator account. Alternatively, have another user whose account is a member of the FactoryTalk Administrators group reset your locked account or password for you.

If the administrator account was disabled, have another user enable the account in FactoryTalk Administration Console. The last FactoryTalk administrator account in a directory cannot be disabled. If no other user is available, or the password to another administrator account is not known (for example, because that user left the organization), contact Rockwell Automation Technical Support.

See also

Select a FactoryTalk Directory to configure on page 197

Network directory and account access on page 198

Network directory and the FactoryTalk Directory Configuration Wizard on page 199

Local directory and account access on page 200

Product support for network and local directories on page 202

Select a FactoryTalk Directory to configure

The first step in configuring a FactoryTalk Directory is to select which FactoryTalk directory to configure from the first page in the FactoryTalk Directory Configuration Wizard.

To select a FactoryTalk Directory to configure


2. In FactoryTalk Directory Configuration Wizard, under Configure settings, choose one or both of the following:

   - Configure the FactoryTalk Network Directory
   - Configure the FactoryTalk Local Directory

3. Select Next.
Configure FactoryTalk Network Directory

To configure (or reconfigure) a FactoryTalk network directory or to upgrade an existing FactoryTalk network directory, logging on is required. This allows the FactoryTalk Directory Configuration Wizard to access the directory and configure it. To configure the FactoryTalk network directory, run the FactoryTalk Directory Configuration Wizard at the computer that is the FactoryTalk network directory server.

Tip: Configuring the FactoryTalk network directory from a remote computer is not allowed.

Depending on what accounts are available in the network directory, log on using:

- Any Windows administrator account that is a member of the local Windows administrators group on the computer where the FactoryTalk network directory server is located.
- Any FactoryTalk account that is a member of the FactoryTalk Administrators group in the network directory.

Log on using an existing FactoryTalk administrator account to reset the password of the account if it has expired. If your account has been locked or disabled, have another user whose account is a member of the FactoryTalk Administrators group enable the account or reset your password.

Important: Keep your administrator user name and password in a safe place. To enable the administrator account, both the original user name and password to the account are required. If either is lost, the account cannot be enabled.

If the administrator account is disabled, the FactoryTalk Directory Configuration Wizard cannot enable the account. Instead, have another user enable the account in FactoryTalk Administration Console. The last FactoryTalk administrator account in a directory cannot be disabled.
If no other user is available, or the password to another administrator account is not available (for example, because that user left the organization), contact Rockwell Automation Technical Support.

See also

Network directory and the FactoryTalk Directory Configuration Wizard on page 199

Reset an expired password on page 204

Change Password (network) on page 205

Summary on page 206

FactoryTalk Directory Configuration Wizard

Running the FactoryTalk Directory Configuration Wizard to reconfigure the FactoryTalk network directory performs these operations:

- Backs up the original directory.
  The backup file is named NetworkInstall*.bak and is located in C:\ProgramData\Rockwell\RNAServer\Backups. The location of the backup files is also logged to FactoryTalk Diagnostics. View the diagnostic log files using the FactoryTalk Diagnostics Viewer.

- Adds the Windows Administrators group to the FactoryTalk Administrators group, if an error occurred while you were installing or upgrading the FactoryTalk Services Platform on a computer for the first time, or if a valid administrator account could not be found.
  This means that any user account that is a member of the local Windows Administrators group on any computer connected to the network directory has administrative access to the directory.

- Updates policies in the directory and adds the $AnonymousLogon account to the directory, if an error occurred while upgrading an existing FactoryTalk Directory.
  This account is given Common > Read and Common > List Children access to the FactoryTalk Directory. This account is used when FactoryTalk products require service access to the directory.

- Changes the password, if the password to a FactoryTalk account has expired, and the account is a member of the FactoryTalk Administrators group.

- Resets the account, if a FactoryTalk administrator account becomes locked.
See also

Configure FactoryTalk Network Directory on page 198

Reset an expired password on page 204

Change Password (network) on page 205

Summary on page 206

Configure FactoryTalk Local Directory

To configure (or reconfigure) a FactoryTalk local directory, or to upgrade an existing FactoryTalk local directory, logging on is required. This allows the FactoryTalk Directory Configuration Wizard to access the directory and configure it. Reconfiguring the FactoryTalk local directory allows you to reset the password of an expired administrator account.

Depending on what accounts are available in the local directory, log on using:

- Any Windows administrator account that is a member of the local Windows administrators group on the local computer.
- Any FactoryTalk account that is a member of the FactoryTalk Administrators group in the local directory.

Log on using an existing FactoryTalk administrator account to enable the account if it has become locked, or if the password to the account has expired. Alternatively, have another user whose account is a member of the FactoryTalk Administrators group enable the account or reset the password.

Important: Keep the administrator user name and password in a safe place. To enable the administrator account, both the original user name and password to the account are required. If either is lost, the account cannot be enabled.

If the administrator account was disabled, the FactoryTalk Directory Configuration Wizard cannot enable the account. Instead, have another user enable the account in FactoryTalk Administration Console. The last FactoryTalk administrator account in a directory cannot be disabled.

If no other user is available, or the password to another administrator account is not available (for example, because that user left the organization), contact Rockwell Automation Technical Support.

See also

Select a FactoryTalk Directory to configure on page 197

Local directory and the FactoryTalk Directory Configuration Wizard on page 201
Enter an administrator user name and password on page 203

Change Password (local) on page 204

Product support for network and local directories on page 202

Running the FactoryTalk Directory Configuration Wizard to reconfigure the FactoryTalk local directory performs these operations:

- Backs up the original directory.
  The backup file is named LocalInstall*.bak, and is located in C:\ProgramData\Rockwell\RNAServer\Backups. The location of the backup files is also logged to FactoryTalk Diagnostics. Use FactoryTalk Diagnostics Viewer to view the diagnostic log files.

- Adds the Windows Administrators group to the FactoryTalk Administrators group if an error occurred while installing or upgrading the FactoryTalk Services Platform on a computer for the first time, or if a valid administrator account could not be found.
  This means that any user account that is a member of the local Windows Administrators group on the local computer has administrative access to the directory.

- Adds the Windows Authenticated Users group to the local directory, allowing any user who is logged on to Windows to access the local directory.
  Tip: The Windows Authenticated Users group includes all users and computers whose identities have been authenticated. The Authenticated Users group is used to override security in the local directory by granting access to all authenticated Windows user accounts. Authenticated Users does not include Guest even if the Guest account has a password.

- Updates policies in the directory, and adds the $AnonymousLogon account to the directory, if an error occurred while upgrading an existing FactoryTalk Directory.
  This account is given Common > Read and Common > List Children access to the FactoryTalk Directory. This account is used when FactoryTalk products require service access to the directory.

- Changes the password, if the password to a FactoryTalk account that is a member of the FactoryTalk Administrators group expires.

- Resets the account if a FactoryTalk administrator account becomes locked.

See also

Configure FactoryTalk Local Directory on page 200
FactoryTalk® Directory allows products to share a common address book, which finds and provides access to plant-floor resources, such as data tags and graphic displays.

The FactoryTalk® Services Platform includes two separate directories: a local directory and a network directory.

- **In a local directory**, a Directory Server, all project information, and all participating software products are located on a single computer. Local applications cannot be shared across a network.
- **A network directory** organizes project information from multiple FactoryTalk® products across multiple computers on a network.

Which directory to configure depends upon which software products are part of the FactoryTalk system. The table below shows which products require a network directory, which require a local directory, and which use either directory.

<table>
<thead>
<tr>
<th>Product</th>
<th>Network Directory</th>
<th>Local Directory</th>
</tr>
</thead>
<tbody>
<tr>
<td>FactoryTalk® Administration Console</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>FactoryTalk® AssetCentre</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>FactoryTalk Batch</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>FactoryTalk Historian Classic</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>FactoryTalk Historian for Batch</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>FactoryTalk Linx™</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>FactoryTalk Linx™ Gateway</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>FactoryTalk Metrics</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>FactoryTalk Portal</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>FactoryTalk ProductionCentre®</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>FactoryTalk Scheduler</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>FactoryTalk Transaction Manager</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>FactoryTalk View Machine Edition (ME)</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>FactoryTalk View Site Edition (SE)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>FactoryTalk View SE Local</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Logix Designer</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>RSAutomation Desktop®</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>RSBizWare™ BatchCampaign™</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>RSBizWare eProcedure®</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Enter an administrator user name and password

Enter a Windows Administrator account user name and password. If the user name and password are accepted, the directory is configured and the FactoryTalk Directory Configuration Wizard summary is displayed.

Prerequisites


2. In FactoryTalk Directory Configuration Wizard, select the directory you want to configure, and select Next.

To enter an administrator user name and password

1. In Administrator User Name, enter a Windows Administrator account or FactoryTalk Administrator account user name.

2. In Password, enter the password that corresponds to the user name you entered.

3. Select Next.

See also

Select a FactoryTalk Directory to configure on page 197

Reset an expired password on page 204

Configure FactoryTalk Network Directory on page 198

Configure FactoryTalk Local Directory on page 200

Default passwords on page 207

*The FactoryTalk local directory is not supported in RSLogix 5000 v20 software.

### Table: Supported Software

<table>
<thead>
<tr>
<th>Software</th>
<th>Need FactoryTalk Directory</th>
<th>RSLogix® Classic</th>
<th>RSLogix™ 5</th>
<th>RSLogix 500®</th>
<th>RSLogix 5000®</th>
</tr>
</thead>
<tbody>
<tr>
<td>RSNetWorx™</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>RSMAC™</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes*</td>
<td></td>
</tr>
<tr>
<td>RSLinx® Classic</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>RSLogix® 5</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>RSLogix 500®</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

See also

Select a FactoryTalk Directory to configure on page 197
Reset an expired password

When using the FactoryTalk Directory Configuration Wizard, if the password to the administrator account has expired, **Change Password** opens automatically. It cannot be opened manually.

**Tip:** Alternatively, use FactoryTalk Administration Console or FactoryTalk View Studio instead of the FactoryTalk Directory Configuration Wizard to change an account password.

To reset an expired password

1. In **New password**, enter the new password for the administrator account.
2. In **Confirm new password**, enter the same password entered in **New password**, and select **OK**.

Depending on how the FactoryTalk security policies are configured, minimum password length and password complexity requirements might apply.

**See also**

- [Configure FactoryTalk Network Directory](#) on page 198
- [Configure FactoryTalk Local Directory](#) on page 200
- [Default passwords](#) on page 207

### Change Password (local)

The **Change Password** window appears automatically if the FactoryTalk local directory contains an administrator account with an expired password. There is no way to make this window appear manually if there is no administrator account with an expired password in the directory.

To change the password to an account manually, use FactoryTalk Administration Console instead of the FactoryTalk Directory Configuration Wizard.

If no other user is available and the password to the FactoryTalk administrator account has been lost or forgotten, contact Rockwell Automation Technical Support.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator user name</td>
<td>Displays the user name of the expired administrator account.</td>
</tr>
<tr>
<td>Old password</td>
<td>Displays asterisks (*) as a placeholder for the old password typed for the expired account.</td>
</tr>
<tr>
<td>New password</td>
<td>Type the new password to the account.</td>
</tr>
</tbody>
</table>
Confirm new password

Type the same password as in the New password box.

Depending on how the FactoryTalk security policies are configured, a minimum password length and password complexity requirements might apply. Check with the FactoryTalk administrator for specific requirements.

If the new password is rejected, check that the new password:

- Is not the same as any of the last 3 passwords used for the account
- Does not contain all of the user account name. For example, a user account named John12 cannot have the password John1234. However, the password 12John is permitted. This check is also case sensitive so John12 could have the password jOHN12.
- Is at least six characters long
- Contains characters from three of the following four categories:
  - Unaccented uppercase characters (A to Z)
  - Unaccented lowercase characters (a to z)
  - Numerals (0 to 9)
  - Non-alphanumeric characters (!, @, #, %)

Important: Keep a record of the administrator user name and password in a safe place. To enable the administrator account, you must have both the original user name and password to the account. If either is lost, the account cannot be enabled.

See also

- Configure FactoryTalk Local Directory on page 200
- Summary on page 206
- Default passwords on page 207

Change Password (network)

When running the Configuration Wizard, if your administrator account has an expired password, Change Password appears automatically. There is no way to make this window appear manually if there is no administrator account with an expired password in the directory.

To change the password to an account manually, use FactoryTalk Administration Console or FactoryTalk View Studio instead of the FactoryTalk Directory Configuration Wizard.

If no other user is available and you cannot remember the password to your FactoryTalk administrator account, contact Rockwell Automation Technical Support.

Use the following settings to reset the password in your FactoryTalk network directory.
### Setting Description

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator user name</td>
<td>This box displays the user name you typed for the expired administrator account in the previous step of the wizard.</td>
</tr>
<tr>
<td>Old password</td>
<td>This box displays asterisks (*) as a placeholder for the old password you typed for the expired account in the previous step of the wizard.</td>
</tr>
<tr>
<td>New password</td>
<td>Type the new password to the account.</td>
</tr>
<tr>
<td>Confirm new password</td>
<td>Type the same password you typed in the New password box.</td>
</tr>
</tbody>
</table>

Depending on how the FactoryTalk security policies are configured, a minimum password length and password complexity requirements might apply. Check with your FactoryTalk administrator if the suggestions below do not work.

If the wizard will not accept your new password, make sure that your new password:

- Is not the same as any of the last 3 passwords you used for the account
- Does not contain all of the user account name. For example, a user account named John12 cannot have the password John1234. However, the password 12John is permitted. This check is also case sensitive so John12 could have the password jOHN12.
- Is at least six characters long
- Contains characters from three of the following four categories:
  - Unaccented uppercase characters (A to Z)
  - Unaccented lowercase characters (a to z)
  - Numerals (0 to 9)
  - Non-alphanumeric characters (!, @, #, %)

If no other user is available and you cannot remember the password to your FactoryTalk administrator account, contact Rockwell Automation Technical Support.

**See also**

- [Reset an expired password](#) on page 204
- [Configure FactoryTalk Network Directory](#) on page 198
- [Summary](#) on page 206
- [Default passwords](#) on page 207

**Summary**

How do I open Summary?

Click **OK** in the second wizard screen--**Reconfigure a Network Directory** or **Reconfigure a Local Directory**.

When the FactoryTalk Directory Configuration Wizard finishes, **Summary** shows a list of what the FactoryTalk Directory Configuration Wizard did, together with any errors that might have occurred. These errors are also logged to FactoryTalk Diagnostics and can be reviewed using the FactoryTalk Diagnostics Viewer.
If an error occurred while running the FactoryTalk Directory Configuration Wizard, review the errors shown in **Summary**, and refer to the list of common errors below. After resolving the likely problems, run the wizard again.

Common causes for errors include:

- **Insufficient disk space.** Clear some disk space and then run the wizard again.

- **You are not logged on as an administrator.** You must be logged on as an administrator to run the FactoryTalk Directory Configuration Wizard. To run the wizard because an error occurred during installation for the first time on a computer, you must be logged on as a Windows local administrator.

- **The FactoryTalk Directory is in read-only mode.** This error applies to only the FactoryTalk network directory. This error appears as a warning when your computer cannot communicate with the FactoryTalk network directory server, or if the network connection is lost while configuring the directory. Make sure both your computer and the FactoryTalk network directory are connected to the network. You do not need to run the wizard again after reconnecting to the FactoryTalk network directory server.

- **You are attempting to configure the FactoryTalk Directory from a remote computer.** You cannot use Remote Desktop Services to configure a FactoryTalk Directory. You must configure a FactoryTalk local directory at the local computer. You must configure a FactoryTalk network directory at the computer that is the FactoryTalk network directory server.

See also

FactoryTalk Directory Configuration Wizard

**Default passwords**

If you are trying to configure a directory but you are being prompted for a password you don’t have, this might be because you are upgrading from FactoryTalk Automation Platform version 2.00.

In version 2.00, you had to create passwords for FactoryTalk administrator accounts in both the network directory and the local directory.

To upgrade existing directories to FactoryTalk Services Platform version 2.10 or later, you must supply the original user name and password for the FactoryTalk administrator accounts.

- For the FactoryTalk local directory, the original default user name was Administrator, and the password field was left blank.

- For the FactoryTalk network directory, the original default user name was Administrator, but you were prompted to provide a password.
If you cannot remember the password to an existing directory, you cannot access that directory. Contact Rockwell Automation Technical Support.

See also

- Enter an administrator user name and password on page 203
- Reset an expired password on page 204
Appendix A

Upgrade FactoryTalk Services Platform

In a distributed FactoryTalk System, all computers must run the same FactoryTalk Services Platform major release, referred to as Coordinated Product Release (CPR). While not required, Rockwell Automation also recommends that all computers run the same FactoryTalk Services Platform minor release and patch levels. For the latest compatibility information, refer to the Product Compatibility and Download Center.

During the upgrade, the installer automatically:

- Creates a backup file for any FactoryTalk Directory already configured on the computer.
- Updates existing Local Directory and Network Directories with support for new product policies, system policies, and features.
- Leaves existing settings unchanged, including user and group accounts, security settings, and policy settings.

Prerequisites

- Obtain the installation disc of a FactoryTalk-enabled product
  or
- Obtain the standalone FactoryTalk Services Platform installation file downloaded from the Rockwell Automation Product Compatibility and Download Center.

To upgrade FactoryTalk Services Platform


2. (optional) Upgrade client computers:
   a. Log in to the computer as a user in the Windows Administrators group.
   b. Shut down all Rockwell Automation software products running on the computer.
c. Insert the product disc and select FactoryTalk Services Platform, or run the standalone FactoryTalk Services Platform installation file.

d. Once installation is complete, restart the computer.

3. Upgrade the FactoryTalk Network Directory server:

a. Log in to the computer as a user in the Windows Administrators group.

b. Shut down all Rockwell Automation software products running on the computer.

c. Disconnect the computer from the network, so client computers cannot connect during the upgrade.

d. Use Windows Control Panel to uninstall FactoryTalk Services Platform.

e. Insert the product disc and select FactoryTalk Services Platform, or run the standalone FactoryTalk Services Platform installation file.

f. Once installation is complete, restart the computer.

g. Reconnect the computer to the network.

See also

Product Compatibility and Download Center

Back up a FactoryTalk Directory on page 164

Restore a FactoryTalk Directory on page 176

Identify the installed FactoryTalk Services Platform version

Identify the installed FactoryTalk Services Platform version to determine if an upgrade of FactoryTalk Services Platform is necessary.

To identify the installed FactoryTalk Services Platform version

1. Open the Windows Control Panel.

2. Open Add or Remove Programs.

3. In the list of installed programs, FactoryTalk Services Platform appears, with the version number shown beside it.
FactoryTalk Web Services

FactoryTalk Web Services allow web-enabled Rockwell Automation software products to access FactoryTalk services over a network using the Hypertext Transfer Protocol (HTTP) or the Hypertext Transfer Protocol over Secure Socket Layer (HTTPS).

The FactoryTalk Security Web Service allows clients to interact with the FactoryTalk Directory for authentication and authorization. The web service also provides support for products running in environments such as Linux and Java.

For details about using FactoryTalk Web Services with your FactoryTalk-enabled product, see your product documentation.

**Important:**
If deploying FactoryTalk Web Services in an environment where privacy of the network communications might be at risk, add an HTTPS site binding to encrypt all client connections to FactoryTalk Web Services.

**See also**

- Install FactoryTalk Web Services on page 211
- Add an HTTPS site binding for FactoryTalk Web Services on page 212

FactoryTalk Web Services is installed from any FactoryTalk-enabled product CD that includes FactoryTalk Services Platform, version 2.10.02 (CPR 9 Service Release 2) or later. It is an optional component and is not installed automatically with FactoryTalk Services Platform.

For most applications, install FactoryTalk Web Services on the computer that is the FactoryTalk Network Directory server. Specific FactoryTalk-enabled products using FactoryTalk Web Services might also have additional installation requirements. For details, see the documentation supplied with your FactoryTalk-enabled product.

**To install FactoryTalk Web Services**

1. Log on to the FactoryTalk Network Directory Server computer with a user account that is a member of the **Windows Administrators** group.

2. Go to the Windows **Control Panel** and open **Programs and Features**.
3. Select FactoryTalk Services Platform, then select Change.

4. Follow the instructions on the screen to modify the existing installation.

5. In the list of program features, click FactoryTalk Web Services, then click This feature, and all subfeatures, will be installed on local hard drive.

6. Click Next, then follow the instructions to finish the installation.

See also

Add an HTTPS site binding for FactoryTalk Web Services on page 212

If deploying FactoryTalk Web Services in an environment where privacy of the network communications might be at risk, add an HTTPS site binding to encrypt all client connections to FactoryTalk Web Services.

Prerequisites

- Install FactoryTalk Web Services.
- Configure Internet Information Services (IIS) to use web server security.

To add an HTTPS binding for FactoryTalk Web Services

1. On the FactoryTalk server, from Control Panel, select Administrative Tools > Internet Information Services (IIS) Manager.

2. From Connections, select Default Web Site.

3. From Actions, select Bindings.

4. In Site Bindings, select Add.

5. In Add Site Binding, specify the following the binding properties:

   - Type: Select HTTPS.
   - IP Address: Select All Unassigned.
   - Port: Enter 443.
   - SSL Certificate: Select the SSL certificate for the FactoryTalk Web Services server.

6. Click OK, then click Close.

7. From Connections, select FactoryTalk.
8. In /FactoryTalk Home, double-click SSL Settings, select Require SSL, then select Accept.

9. From Actions, select Apply.

See also

Microsoft TechNet: Configure Web Server Security (IIS 7)

**Client computers unable to connect to FactoryTalk Web Services**

Possible cause and solution:

- Lack of network connectivity.
  Check the network connection of the client computer and verify that it can connect to other network resources.
  Check the network connection of the FactoryTalk Web Services host computer and verify that it can connect to network resources and accept inbound connections.

- Required software is not installed on the FactoryTalk Web Services host computer.
  Verify Microsoft .NET Framework 4.6 is installed on the FactoryTalk Web Services host computer. If it is not installed, install it using the FactoryTalk Services Platform installation media.
  Verify Internet Information Services (IIS) is installed on the FactoryTalk Web Services host computer. If it is not installed, install it using Control Panel (Windows) or Administrative Tools (Windows Server).

- Internet Information Services (IIS) is not listening on the default ports on the FactoryTalk Web Services host computer.
  On the FactoryTalk Web Services host computer, open a browser and connect to the login URL:

  **HTTP:**

  **HTTPS:**

  If the FactoryTalk Web Services page does not appear, IIS is either not running properly or is configured to listen on another port. Use IIS Manager to check the configuration and update client computer FactoryTalk Web Services paths to use a non-default port if necessary.

- The firewall on the FactoryTalk Web Services host computer does not allow incoming traffic on the ports configured in IIS Manager.
On the client computer, open a browser and connect to the login URL. Replace `server_path` with the fully qualified domain name of the FactoryTalk Web Services host computer and replace the port number with the port number configured in IIS Manager:

**HTTP:**
http://`server_path`:80/FactoryTalk/Security/WebService/200810.asmx

**HTTPS:**

If the FactoryTalk Web Services page does not appear, verify that the firewall on the FactoryTalk Web Services host computer allows incoming traffic to the ports configured in IIS Manager.

See also

FactoryTalk communications

*How to change the TCP port for IIS services*

Possible cause and solution:

- User account does not have permission to log into FactoryTalk Web Services

  1. On the FactoryTalk Web Services host computer, open a browser and connect to the login URL. Replace the port number with the port number configured in Internet Information Services (IIS) Manager:

     **HTTP:**

     **HTTPS:**

*User cannot log into FactoryTalk Web Services*
2. Select Login.

3. In userName, enter the user name for an account already configured in the FactoryTalk Network Directory.

4. In password, enter the password for the account.

5. In encryptionAlgorithm, type ClearText then click the Invoke button.

If the page returns an XML string, the user account is valid for use with FactoryTalk Web Services.

- User account has been disabled or locked in FactoryTalk Directory.
  Contact the FactoryTalk administrator to verify account status.

See also

Client computers unable to connect to FactoryTalk Web Services on page 213
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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.

<table>
<thead>
<tr>
<th>United States or Canada</th>
<th>1.440.646.3434</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outside United States or Canada</td>
<td>Use the Worldwide Locator available at <a href="http://www.rockwellautomation.com/locations">http://www.rockwellautomation.com/locations</a>, or contact your local Rockwell Automation representative.</td>
</tr>
</tbody>
</table>

New product satisfaction return

Rockwell Automation tests all of its products to 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.

<table>
<thead>
<tr>
<th>United States</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outside United States</td>
<td>Please contact your local Rockwell Automation representative for the return procedure.</td>
</tr>
</tbody>
</table>

Documentation feedback

Your comments will help us serve your documentation needs better. If you have any suggestions on how to improve this document, complete the feedback form, publication RA-DU002 http://literature.rockwellautomation.com/idc/groups/literature/documents/du/ra-du002_en-e.pdf.

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