



FactoryTalk

by ROCKWELL AUTOMATION

FactoryTalk[®] Historian SE

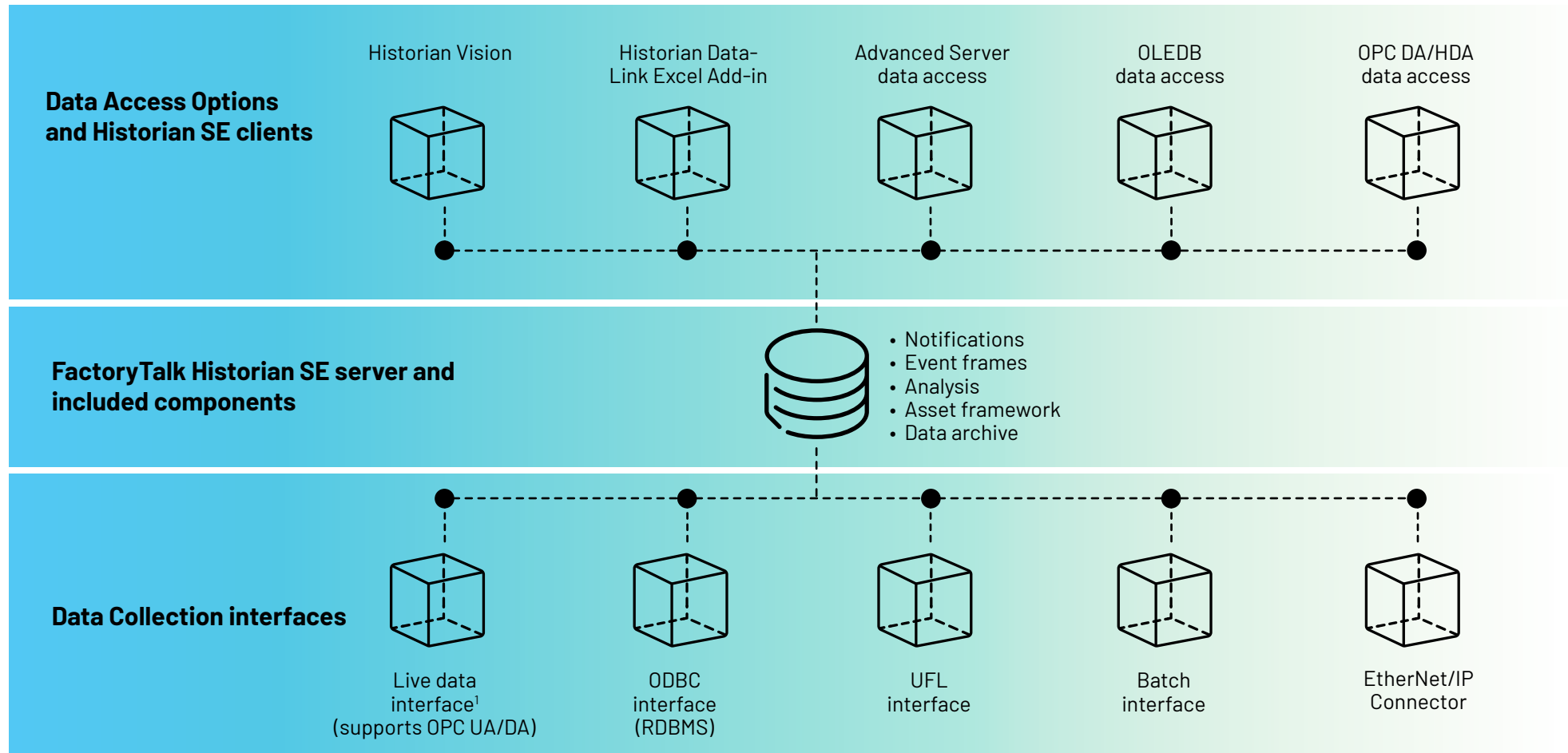
ORDERING GUIDE

FactoryTalk® Historian SE

FactoryTalk® Historian Site Edition (SE) is a system of record for your operations across the entire plant. It provides the capability to collect, store, analyze, and contextualize data using a powerful engine that optimizes data collection, compresses vast amount of data in a small format, and enables high speed data retrieval. The system consists of: Data collection interfaces, FactoryTalk Historian SE server, data access options, and visualization/analysis tools.

This ordering guide will help you determine which FactoryTalk Historian SE components are best suited to your needs.

FactoryTalk Historian SE System Overview by ROCKWELL AUTOMATION



Overview of the MyRockwell Software Portal Ordering Sequence

1 Select a tiered package

- FactoryTalk Historian SE **Starter, 250 tags**
- FactoryTalk Historian SE **Standard, 1000 tags**
- Any other tiered package

2 Select Subscriptions or Perpetual with Maintenance

3 Select support level

- 8x5 M-F support
- 24x7 support
- Self-support

4 Select media if necessary

5 Select Quantity (for tiered Package) and add to cart

Note: If you leave the Product Details page and return to add another product, your selection settings in steps 2, 3, and 4 are reset to default values.

6 Optional: For Recommended Products, specify quantity for each selected item and add to cart.

Note: Recommended Products pricing reflects your selections in steps 2, 3 and 4. The description will include the word "Subscription" or "Perpetual" to give an indication on what product type has been selected.

Note: All items in the Recommended Products section can be ordered independently without inclusion of a tiered package selection. If the user is only interested in Recommended Products, skip step 5.



FactoryTalk® Historian SE Server

A FactoryTalk Historian SE server includes a data point-limited license, Asset Framework, Event Frames, Analysis (calculation engine with results stored as time series), and Notifications. Additionally, server licenses include the FactoryTalk® Live Data Interface and FactoryTalk® Linx for communications to Rockwell Automation controllers. Communications to third-party devices can be through the FactoryTalk Live Data interface using a third-party OPC UA or DA server (purchased separately).

Tag licensing is additive. License activations can be used on either one or split across multiple Historian SE servers.

FOR NEW HISTORIAN SERVER DEPLOYMENTS:

- The maximum server size is **60,000 tags**.
- **10% of total tags** can be from any data source (Rockwell or 3rd party data source).
- A Rockwell Data Source is defined as a Rockwell Automation device or data shown on Rockwell Automation HMI as part of a FactoryTalk System.

The following tiered packages are available



FactoryTalk Historian SE Server

250

FactoryTalk Historian SE Starter - 250 tags

Included in this package is a Historian SE Server with 250 tags. FactoryTalk® VantagePoint® EMI is NOT included

Tag capacity can be expanded up to the maximum server size by either selecting multiple of this package or by selecting any of the Historian SE server packages available (tag licensing is additive).

5000

FactoryTalk Historian SE - 5,000 tags

Included in this package is a Historian SE Server with 5,000 tags. FactoryTalk VantagePoint EMI is NOT included.

Tag capacity can be expanded up to the maximum server size by either selecting multiple of this package or by selecting any of the Historian SE server packages available (tag licensing is additive).

1000

FactoryTalk Historian SE Standard - 1,000 tags

Included in this package is a Historian SE Server with 1,000 tags. FactoryTalk VantagePoint EMI is NOT included.

Tag capacity can be expanded up to the maximum server size by either selecting multiple of this package or by selecting any of the Historian SE server packages available (tag licensing is additive).

10000

FactoryTalk Historian SE - 10,000 tags

Included in this package is a Historian SE Server with 10,000 tags. FactoryTalk VantagePoint EMI is NOT included.

Tag capacity can be expanded up to the maximum server size by either selecting multiple of this package or by selecting any of the Historian SE server packages available (tag licensing is additive).

NOTE: A volume discount is applied when using multiple quantities of the **FactoryTalk Historian SE Standard - 1,000 tags** package. Here are the benefits:

- Provides a broad range of tag capacity (any multiple of 1000 tags) to fit the need of any application
- Allows volume purchasing of licenses at the enterprise and allocating to sites in 1000 tag increments
- An automatic discount for Historian SE Server in a Collective (high availability)

FactoryTalk Historian SE Server

500

FactoryTalk Historian SE with Productivity Clients - 500 tags

Included in this package is a Historian SE Server with 500 tags. VantagePoint EMI Server is included with 1 Named User and 3 Concurrent Users.

When additional tags are needed, it is recommended to use the "Historian SE 1,000 Tag Add On" from Recommended Products or any other Historian SE server package available (tag licensing is additive).

20000

FactoryTalk Historian SE - 20,000 tags

Included in this package is a Historian SE Server with 20,000 tags. FactoryTalk VantagePoint EMI is NOT included.

Tag capacity can be expanded up to the maximum server size by either selecting multiple of this package or by selecting any of the Historian SE server packages available (tag licensing is additive).

50000

FactoryTalk Historian SE - 50,000 tags

Included in this package is a Historian SE Server with 50,000 tags. FactoryTalk VantagePoint EMI is NOT included.

Tag capacity can be expanded up to the maximum server size by selecting any of the Historian SE server packages available (tag licensing is additive).

There are also two Recommended Products, which include the Historian SE Server

Historian SE 1,000 Tag Add On

Use to add tags in increments of 1,000 to an existing server (Activation Only).
A volume discount is applied for any quantity of two or more.

Historian SE 500 Tag Add On

Use as a new Historian SE Server with 500 tags or to add 500 tags to an existing server (tag licensing is additive). This item does not qualify for a volume discount.

Client Tools

In addition to the entire Rockwell Automation® portfolio of visualization and analytics products, there are client tools that are specific to FactoryTalk Historian SE, and they can be added to cart from the list of Recommended Products.

Historian SE, DataLink Client, 5 Users

DataLink is an Excel Add-in client application to bring data from Historian SE into Excel and build reporting content. Historian SE, DataLink includes 5 named-users.

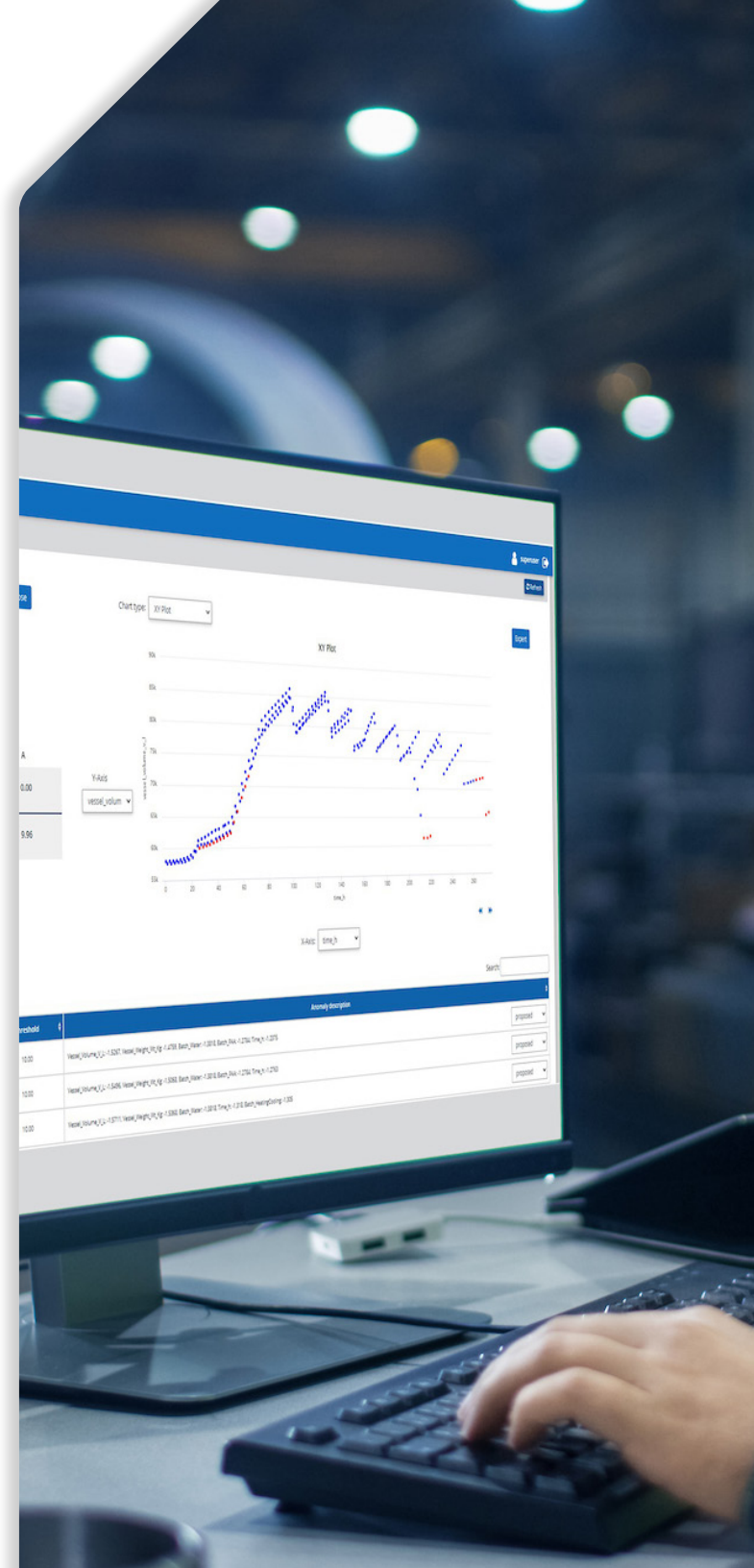
Historian SE, PI Vision Client, 1 User

Vision is a web-based server/client application that enables you to easily retrieve, monitor, and analyze process information on desktop or mobile platforms. In addition to leveraging trends, tables, values, gauges, and XY plots, Vision enables you to view and analyze your Historian SE data during the time range of a particular event. For example, you may want to examine the performance of an asset during an operator shift or compare the data for several assets during a downtime period.

Historian SE Vision application server is licensed by the number of named-users. Each user can be an Explorer and a Publisher. Each Historian Vision client is one named user. The maximum number of Vision clients per FactoryTalk Historian SE Server is 20.

Vision replaces ProcessBook and allows you to bring forward monitoring displays, in a convenient, modern environment.

Select quantity 5 of this product for your initial purchase.



Data access options

Data access options are tools that make it easy to pull Historian SE data into third-party applications and business tools. When considering a data access option, the following is required:

1. Select the desired Data Access option
2. Select the appropriate Unlimited Users CAL based on the Historian server tag count

Historian SE, Advanced Server Add-On

FactoryTalk Historian SE Advanced Server License adds the following data access options: OPC-DA and HDA Servers, OLE DB, ODBC, JDBC, Web API, and Advanced Computation Engine (ACE). For example, with the Web API, you can create custom web tools that access Historian SE data using HTTPS protocol and run on virtually any operating system.

See Unlimited User CAL options below for more information.

Historian SE, OLEDB Data Access

With OLEDB, you can access the Historian SE data by executing SQL queries. OLEDB also includes ODBC provider. See Unlimited User CAL options below for more information.

Historian SE, OPC Data Access

OPC DA/HDA data access is an OPC server to use OPC clients to access Historian SE data. See Unlimited User CAL options below for more information.

Historian SE, Unlimited User CAL options

All data access components, whether purchased as part of the Advanced Server Add On, or separately (i.e. OLEDB and OPC), required client licensing for third-party applications to consume Historian SE data. See Unlimited User CAL options below for more information.

- Historian SE, Unlimited User CAL for 250 tag servers
- Historian SE, Unlimited User CAL for 500 tag servers
- Historian SE, Unlimited User CAL for 1000 tag servers
- Historian SE, Unlimited User CAL for servers up to 2.5K tags
- Historian SE, Unlimited User CAL for servers up to 5000 tags
- Historian SE, Unlimited User CAL for servers up to 10,000 tags
- Historian SE, Unlimited User CAL for servers up to 20,000 tags
- Historian SE, Unlimited User CAL for servers up to 50,000 tags

Note: Rockwell Automation client applications, i.e. FactoryTalk® View, FactoryTalk® VantagePoint, FactoryTalk® Analytics™ DataView, ThingWorx, do not require users CAL.



Data collection interfaces

Interfaces are the software applications that take the data from your data source and send them to the Historian SE server. Data collection interfaces typically run on a dedicated host and called an interface node.

The **FactoryTalk Live Data Interface** is included with every Historian SE server license. It is used with Rockwell Automation controllers and is also an OPC UA and DA client.

Here is a list of additional interfaces that can be purchased separately.

Historian SE to SE Interface

Use this interface to replicate data from one Historian SE server (source) to another Historian SE server (target).

Each source server requires its own SE to SE interface. The target server requires the license count to be at least the sum of the tag licensing that exists on each source server even if you are only replicating a subset of tags from one or more sources.

This interface is also required when aggregating Historian ME data to a Historian SE Collective (High Availability). In this case, the only required activation at the target server is for the number of tags that are being transferred to the collective. This interface is not required with Historian ME if the target Historian SE server is not configured as a Collective; the built-in Data Transfer mechanism in Historian ME can be used.

Example: Historian SE (Source 1) has 5000 tags, Historian SE (Source 2) has 10,000 tags, so Historian SE (Target) needs Licensing for 15,000 tags (combine total of two source servers)

Historian SE, ODBC Interface

Use this interface to extract data from an ODBC data source and copy it to the Historian SE server. This interface is also known as RDBMS.

Historian SE, Universal File Loader I/F

Universal File Loader is an interface used for importing manual data from a file formatted as a CSV, XML, or text file.



Data collection interfaces

Historian SE, Batch Interfaces

The Historian SE Batch Interface provides a connection to the FactoryTalk® Batch event journal (EVT file) to capture batch execution in real time. These events are stored in the Historian archive (specifically Historian Batch Database and Historian Module Database) and can be displayed in ProcessBook and Vision clients to show batch operations down to the individual phase operations.

Choose one of the following:

- Historian SE, Batch Interface, 1 Unit
- Historian SE, Batch Interface, 3 Unit
- Historian SE, Batch Interface, 10 Units
- Historian SE, Batch Interface, 30 Units
- Historian SE, Batch Interface, 60 Units

Historian SE, EtherNet/IP Connector

This data collection interface is used with ControlLogix and CompactLogix controllers to support high-speed data collection (in milliseconds). Requires FactoryTalk Historian SE version 8.00 or higher.

OTHER

Historian SE, Event Frame Generator

The Event Frames Generator (EFGen) generates events (Event Frames) in Asset Framework based on values from trigger points in the Historian SE Server. The Event Frame Generator Interface is the replacement for the Batch Generator (PIBaGen) Interface when batch phases include subphase operations.



Example use cases

EXAMPLE USE CASE 1

I want to purchase a 250 tag FactoryTalk Historian SE Server, subscription, 8x5 support.

STEP 1

In this example, we order quantity 1 of **Historian SE Starter – 250 tags Subscription**. Add to Cart and Checkout.

Note: FactoryTalk Historian SE tag licensing is additive. Tag capacity can be expanded up to the maximum server size by selecting any of the Historian SE server packages available.

EXAMPLE USE CASE 2*

I want to purchase a 2,500 tag FactoryTalk Historian SE Server, and 5 Historian Vision clients, subscription, 8x5 support.

STEP 1

In this example, we order quantity 3 of **Historian SE Standard – 1,000 tags Subscription**. Add to Cart and Continue shopping.

STEP 2

From the Recommended Products section, we order 5 quantities of the **Historian SE, PI Vision Client, 1 User Subscription**. Add to Cart and Checkout.

IMPORTANT

Part of our licensing simplification is to offer increments of 1000. Ordering quantity 2 of Historian SE Standard – 1000 tags Subscription and quantity 1 of Historian SE, 500 Tag Add-On Subscription, to get exactly 2500 tags, will result in a similar price due to the volume discount that is available to the Historian SE Standard – 1000 tags package.

This applies to example use case 2

Example use cases

EXAMPLE USE CASE 3

I want to purchase a 5,000 tag FactoryTalk Historian SE Server with High Availability (Collective) perpetual, 8x5 support.

We have 2 possible options in this example since Historian SE licensing is additive. Select the one that better fits the application and project needs.

OPTION 1:

Using two 5,000 tag licenses

STEP 1

We can order quantity 2 of **Historian SE – 5,000 tags Perpetual**. Add to Cart and Checkout.

Note: Customers have the flexibility to either deploy 1 server with 10,000 tags, or a collective (high availability) with 5,000 tags on each member.

OPTION 2:

Using ten 1,000 tag licenses

STEP 1

We can order quantity 10 of **Historian SE Standard – 1,000 tags Perpetual**. Add to Cart and Checkout.

Note: A volume discount is applied to the Historian SE Standard – 1,000 tags quantity of 10. Customers have the flexibility to either deploy 1 server with 10,000 tags, 10 servers with 1,000 tags on each server, or a collective (high availability) with 5,000 tags on each member.

EXAMPLE USE CASE 4*

I want to purchase a 500 tag FactoryTalk Historian SE server, OLEDB data access, subscription, 8x5 support.

STEP 1

Ensure that Subscription is selected for the first tiered package, as well as 8x5 support. Do NOT Add this to cart.

STEP 2

From the Recommended Products, order quantity 1 of **Historian SE, 500 Tag Add On Subscription**. Add to Cart and Continue shopping.

STEP 3

From the Recommended Products section, we order a quantity 1 of the **Historian SE, OLEDB Data Access Subscription**. Add to Cart and Continue shopping.

STEP 4





From the Recommended Products section, we order the **Historian SE, Unlimited User CAL for 500 tag servers Subscription**. Add to Cart and Checkout.

IMPORTANT

All items in the Recommended Products section can be ordered independently without inclusion of a tiered package. However, pricing for Recommended Products reflects your selections from the tiered packages. Therefore, confirm to select Subscription or Perpetual, and the appropriate support level, before adding a recommended product to cart.

This applies to example use case 4



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