FactoryTalk Batch Material Manager Administrator Guide

Rockwell Automation

Administrator Guide

Original Instructions

Important User Information

Read this document and the documents listed in the additional resources section about installation, configuration, and operation of this equipment before you install, configure, operate, or maintain this product. Users are required to familiarize themselves with installation and wiring instructions in addition to requirements of all applicable codes, laws, and standards.

Activities including installation, adjustments, putting into service, use, assembly, disassembly, and maintenance are required to be carried out by suitably trained personnel in accordance with applicable code of practice.

If this equipment is used in a manner not specified by the manufacturer, the protection provided by the equipment may be impaired.

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Throughout this manual, when necessary, we use notes to make you aware of safety considerations.

WARNING: Identifies information about practices or circumstances that can cause an explosion in a hazardous environment, which may lead to personal injury or death, property damage, or economic loss.

ATTENTION: Identifies information about practices or circumstances that can lead to personal injury or death, property damage, or economic loss. Attentions help you identify a hazard, avoid a hazard, and recognize the consequence.

IMPORTANT: Identifies information that is critical for successful application and understanding of the product.

These labels may also be on or inside the equipment to provide specific precautions.

SHOCK HAZARD: Labels may be on or inside the equipment, for example, a drive or motor, to alert people that dangerous voltage may be present.

BURN HAZARD: Labels may be on or inside the equipment, for example, a drive or motor, to alert people that surfaces may reach dangerous temperatures.

ARC FLASH HAZARD: Labels may be on or inside the equipment, for example, a motor control center, to alert people to potential Arc Flash. Arc Flash will cause severe injury or death. Wear proper Personal Protective Equipment (PPE). Follow ALL Regulatory requirements for safe work practices and for Personal Protective Equipment (PPE).

The following icon may appear in the text of this document.

Tip: Identifies information that is useful and can help to make a process easier to do or easier to understand.

Rockwell Automation recognizes that some of the terms that are currently used in our industry and in this publication are not in alignment with the movement toward inclusive language in technology. We are proactively collaborating with industry peers to find alternatives to such terms and making changes to our products and content. Please excuse the use of such terms in our content while we implement these changes.

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Preface

About this manual

This manual provides administrator instructions for the FactoryTalk Batch Material Manager components. It is one of a set of related manuals that describe installing, programming, and operating the FactoryTalk Batch system.

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

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- Components
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- Licenses
  Includes the name of the license, the list of open-source components citing the license, and the terms of the license.

The default location of this file is:

C:\Program Files (x86)\Common Files\Rockwell\Help\FactoryTalk Batch\Release Notes\OPENSOURCE

You may obtain Corresponding Source code for open-source packages included in this product from their respective project web site(s). Alternatively, you may obtain complete Corresponding Source code by contacting Rockwell Automation via the **Contact** form on the Rockwell Automation website: http://www.rockwellautomation.com/global/about-us/contact/contact.page. Please include "Open Source" as part of the request text.

Additional resources

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

Installation, Quick Start, and Getting Results Guides

Resource	Description
FactoryTalk Batch Components Installation and Upgrade Guide (BATCH-IN002)	Provides information and procedures for FactoryTalk Batch system installation. Includes information for FactoryTalk Batch Material Manager, FactoryTalk Event Archiver, and associated FactoryTalk Batch Client and Server components.

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

User Guides

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

Administrator Guides

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

Reference Guides

Resource	Description
FactoryTalk Batch Material Server API Reference Manual (BWMTR-RM001)	Provides access to information regarding the interface between the FactoryTalk Batch Material Server and the FactoryTalk Batch Material Editor and FactoryTalk Batch. It is intended to be used as a reference information by custom interface developers.
FactoryTalk Batch PCD Programming Reference Manual (BATCH-RM004)	Provides information and instructions about the FactoryTalk Batch PCD interface design. It is intended to be used as a reference guide for PCD programmers.
FactoryTalk Batch Server API Reference Manual (BATCH-RM003)	Provides information regarding the interface between the FactoryTalk Batch Server and FactoryTalk Batch View — the Server Application Programming Interface (API). It is intended to be used as a reference guide by custom interface developers.

Resource	Description
FactoryTalk Batch System Files Reference Manual (BATCH-RM005)	Provides the technical information for configuration and maintenance of a FactoryTalk Batch system. It can be used as a reference information for implementation engineers and system administrators.
FactoryTalk Batch eProcedure Instruction File Design Reference Manual (BWEPRO-RM001)	Includes information about the building of manual nstruction files for manual phases in the equipment database This information is intended to be used as a reference by instruction file authors.

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Configuring Material Manager

This chapter contains instructions for configuring FactoryTalk® Batch Material Manager. This chapter assumes that the FactoryTalk Batch system is configured and working properly and that Material Manager is installed.

Identify the material database

Configure the FactoryTalk Batch Material Manager Server with the location of the SQL database that contains the materials for the recipes.

To identify the material database

1. Navigate to **Rockwell Software > Network Editor**.
   The **Network Editor** window opens with the **Material Server** selected by default.
2. Select **Configure**. The **Configure MaterialTrack** dialog box opens. The default database is *materialbasedrecipe*.
3. In the **MaterialTrack Database** box, enter the name of the database, and select **OK**.

IMPORTANT: The **Network Editor** does not verify database names. Changes made to the database name are immediate for the clients and servers. If the database name is invalid, the **Material Editor** will not open.
Before changing the database name, check the spelling of the database name and synchronize the **Network Editor**. After changing the database name, confirm that the **Material Editor** opens and reads the databases.

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4. Select **Synchronize**.
5. Select **File > Exit**, and then select **Yes** to exit the **Network Editor**.

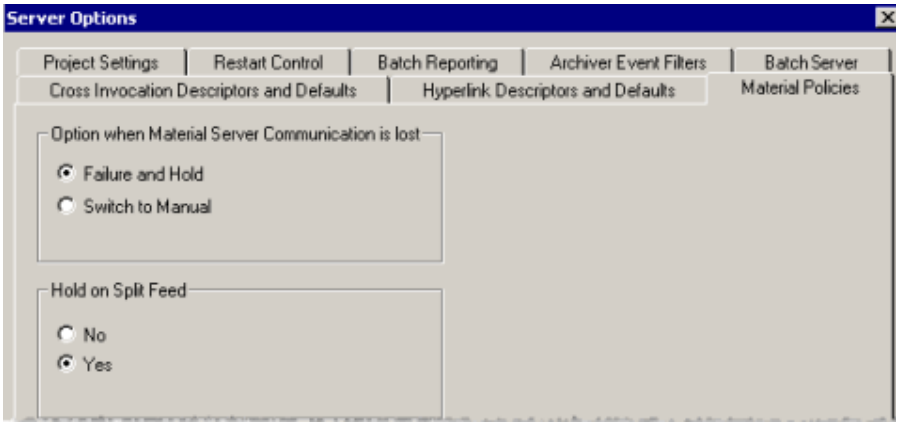
Setting the Material Server options

Set the options for the Material Server in the FactoryTalk Batch Equipment Editor module.

To identify the material database

1. Click **Start > Rockwell Software > Equipment Editor**.
2. From the **Options** menu, select **Server Options**. The **Server Options** dialog box opens to the **Project Settings** tab.

3. Select the **Material Polices** tab.



   - **Option when Material Server Comm is lost**
     When communication is lost between the FactoryTalk Batch and Material Servers, you can choose to fail and hold the batch or switch the batch to Manual mode.
   - **Failure and Hold** indicates the FactoryTalk Batch Server places the batch in the HELD state.
   - **Switch to Manual** indicates the FactoryTalk Batch Server continues to run the batch prompting the operator for decisions regarding information normally supplied by the Material Server. *(See "Troubleshooting" for more information.)*
   - **Hold on Split Feed**
     Split feeds occur when a material phase step does not add or distribute all of the material configured by the step.
   - **No** directs the FactoryTalk Batch Server to continue processing a batch when a split feed occurs. If you select this option, add a material loop to the recipe so that the binding process can select another container for material additions. (*See the FactoryTalk Batch Recipe Editor User Guide for more information on material loops.*)
   - **Yes** directs the FactoryTalk Batch Server to hold the batch when a split feed occurs. The Material Server calculates and sends new AMOUNT parameters to the FactoryTalk Batch Server. To resume processing, the operator must perform an active step change away from the unfinished step, manually rebind the unfinished step, perform an active step change back to the unfinished step, and then restart the batch.

4. Make your selections, and then click **OK**.

Enable the automatic deletion of lots with no remaining sublots

Use the following procedure to enable the automatic deletion of lots with no remaining sublots to free up space in the material database.

Tip: Sublots are identified as labels in Material Editor and FactoryTalk Batch View.

To enable the automatic deletion of lots with no remaining sublots

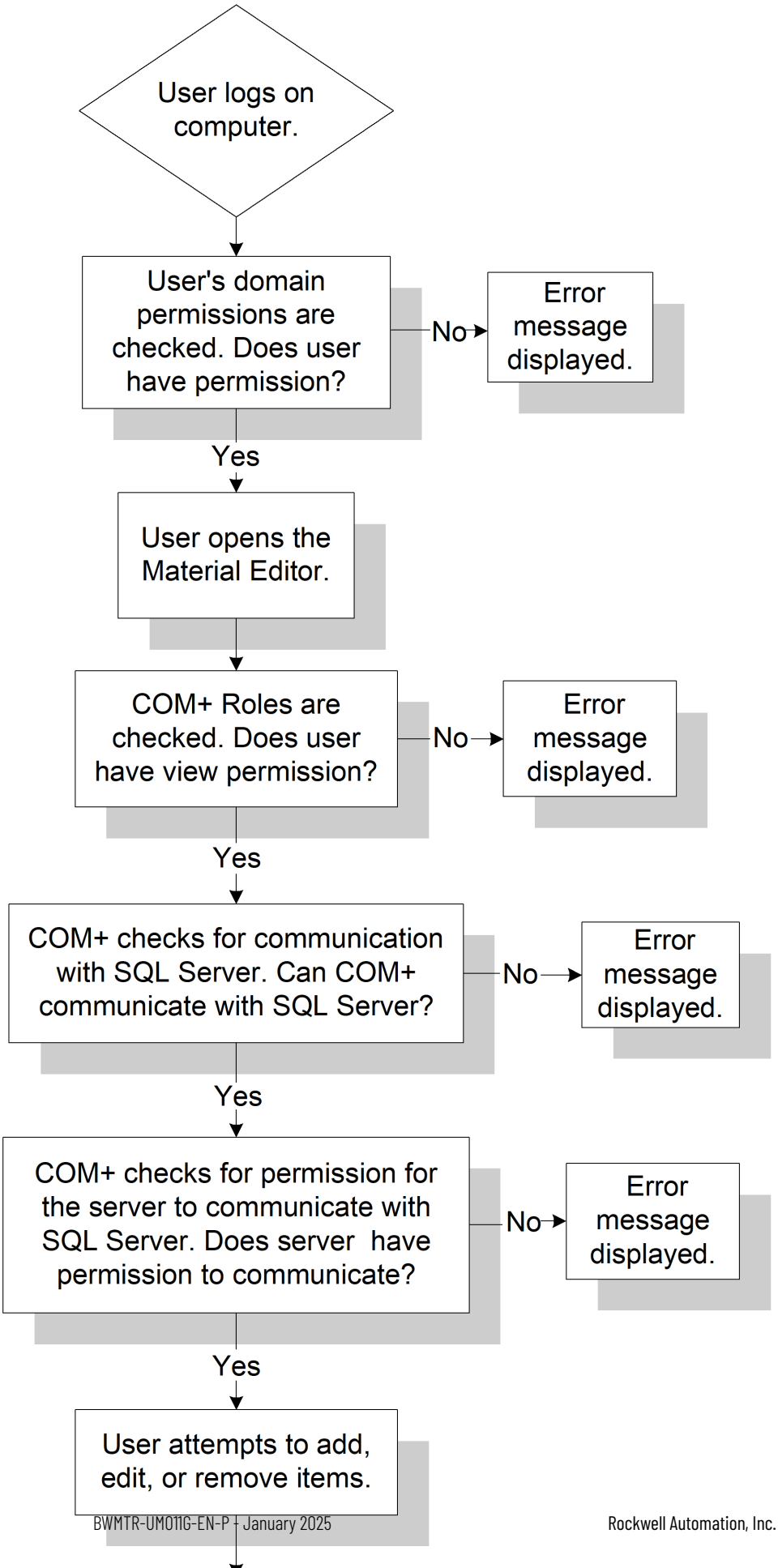
1. On the Material Manager Server machine, create a registry key.
   - 32-bit system Registry Editor location: [HKEY_LOCAL_MACHINE\SOFTWARE\MaterialTrack\Material Recipe\Setup
   - 64-bit system Registry Editor location: [HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node \MaterialTrack\Material Recipe\Setup
2. Create a string value `DeleteLotOnZeroSubLots` and set the **Value** to TRUE.

Implementing security

FactoryTalk Batch Material Manager security controls which accounts have permissions for certain actions, such as viewing, adding, removing, and changing an item. Security is set using COM+ role-based security and Windows user groups and users.

Through the use of COM+ role-based security, administration of security for Material Manager is greatly simplified. COM+ role-based security allows an application to have preset user categories called roles. These roles have preset permissions and have preset Windows user groups added to them. To implement security, an administrator must create the preset user groups and add the appropriate user accounts to these groups.

This flowchart is an example of how security works for Material Manager.



Security settings

The setup program creates a default user group and preset COM+ roles. Domain user groups and accounts created before installation are added to the roles during the installation process. Security is then implemented using Windows user groups and users.

Tip: If you want to customize security, contact Rockwell application support.

Material Manager Security

The local user group installed with Material Manager is **MTUsers**. This group is assigned permissions to the MaterialBasedRecipe database in SQL Server. The domain user account specified during the installation is added to this group role to allow the Editor to access the database using COM+.

To use domain security, create the following user groups and accounts on the domain before installation. These groups and accounts are added to the appropriate COM+ roles during the installation and inherit the permissions of those roles.

- **MTUsers**
  User Group
  Add the FactoryTalk Batch user account under which the FactoryTalk Batch Server service is running to the **MTUsers** group.
- **MTBatchServer**
  User Group & COM+ Role
  Add the FactoryTalk Batch user account under which the FactoryTalk Batch Server service is running to the **MTBatchServer** group. The **MTBatchServer** group is added to the **MTBatchServer** role during installation. The FactoryTalk Batch Server uses this role to access the material database. All FactoryTalk Batch Servers have unlimited access to Material Manager.
- **MTGeneral**
  COM+ Role
  The **MTGeneral** role is used internally by the Material Server to check security and communication between clients and the server.
- **MTLotAuthor**
  User Group & COM+ Role
  The **MTLotAuthor** role has permission to add, edit, and delete lots. The **MTLotAuthor** group is added to the **MTLotAuthor** role during installation.
- **MTMaterialAuthor**
  User Group & COM+ Role
  The **MTMaterialAuthor** role has permission to add, edit, and delete materials and containers. The **MTMaterialAuthor** group is added to the **MTMaterialAuthor** role during installation.
- **MTMaterialViewer**
  User Group & COM+ Role
  The **MTMaterialViewer** role has permission to view items in the Editor. The **MTMaterialViewer** group is added to the **MTMaterialViewer** role during installation.
- **Domain user account for the server**
  User

The domain user account specified during the installation is added to the local group, **MTUsers**. This is the account under which the server runs.

Tip: The *MaterialServer.log* file on the Material Server cannot be viewed from a client computer. You must share the \Program Files\Rockwell Software\Batch folder with the client computers if you want them to be able to reference the logged messages.

Using workgroup security

When FactoryTalk Batch Material Manager is installed for a workgroup, the local user accounts, local user groups, and COM+ Roles are created and assigned default permissions. You must customize the security settings to meet your facility's unique requirements as outlined in the following the steps:

Configuring the FactoryTalk Batch Material Manager Workgroup Server and Client Nodes

- You must define Windows user accounts and passwords on all computers that communicate with the Material Server. Configure membership in FactoryTalk Batch Material Manager user groups on the Material Server computer only.

Tip: Services with blank passwords are not supported.

- **Create Windows User Accounts**
  If you are not using the existing Windows user accounts, add new user accounts with the appropriate rights.
- **Add Windows User Accounts to Windows User Groups**
  Add the appropriate Windows user accounts to the FactoryTalk Batch Material Manager user groups on the Material Server computer. The user accounts inherit the rights and permissions of the user group to which they are added.

Using domain security

Perform the following steps to customize the security settings and implement domain security.

Tip: These steps are one possible implementation of domain security; you might find that your specific security requirements involve other steps.

1. Create domain user accounts.
   If you are not using existing user accounts, create domain user accounts that meet your facility's specific security requirements. For Domain user accounts that need access to Batch client applications, you must add the Windows user accounts to the appropriate FactoryTalk Directory. (See FactoryTalk Help for more information.)
2. Create domain user groups.
   Create these groups on the domain before installing FactoryTalk Batch Material Manager:
   - MTBatchServer
   - MTLotAuthor

- MTMaterialAuthor
- MTMaterialViewer
- MTGeneral

3. Add domain user accounts to the appropriate domain user groups.
   The user accounts will inherit the rights and permissions of the user group to which they are added.

Tip: Services with blank passwords are not supported.

Setting security on folders or files

You should limit log file and e vent journal (*.evt*) access to prevent data from being lost. Setting security on the folders or files is one suggested method. Set the security according to your company's requirements.

Use Notepad to open log files. If a log file is opened with a program other than Notepad, the FactoryTalk Batch Server may not run due to an access error.

IMPORTANT: FactoryTalk Batch Server continues writing information to log files and event journals (*.evt*) even when they are open. If a file is opened and then saved, data that may have been written to the event journal or log file while the file is open is lost.

Adding users and user groups

To add Windows security on folders or files in Windows Explorer

1. In Windows Explorer, locate the folder or file.
2. Right-click the folder or file, and then select **Properties**.
3. Select the **Security** tab, and then click the **Add** button.
4. From the **Select Users**, **Computers**, or **Groups** dialog box, click **Advanced** and then click **Find Now**.
5. Select a User or Group from the **Search results:** list, and then click **OK**.
6. Repeat for each User or Group that requires access to the folder or file.

IMPORTANT: Be sure to add the FactoryTalk Batch Server user account and then configure the account with Full Control permissions.

7. Click **OK** to return to the **Properties** dialog box.
8. From the **Group or user name:** list, select a User or Group, and then select the permissions in the Permissions area. Repeat for each User or Group.
9. Click **OK**.

Change permissions on the BATCHCTL share

Change the permissions on the BATCHCTL share to tighten security by removing the **Everyone** group and adding a new group that contains all the Windows users that need to access the share.

IMPORTANT: This new group allows applications to access the BATCHCTL share while locking out non-domain users.

Include these user types in the group:

- The FactoryTalk Batch Server and FactoryTalk Event Archiver user.
- Windows users logged in when the FactoryTalk Batch Equipment Editor, FactoryTalk Batch Recipe Editor and FactoryTalk Batch View are launched.

To change permissions on the BATCHCTL share

1. In **Windows Explorer**, locate the Batch folder. The default location is C:\Program Files (x86)\Rockwell Software\Batch**.**
2. Right-click the Batch folder, and then select **Properties**.
3. Select the **Security** tab and do the following:

a. Select **Edit**, select the **Everyone** group, and then select **Remove**.

b. After removing the **Everyone** group, select **Add**.

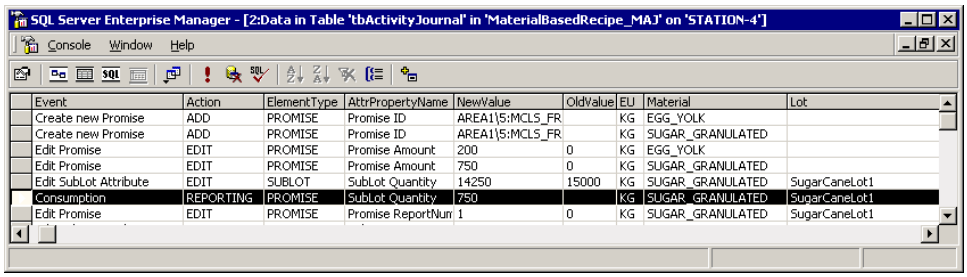
1. From the **Select Users**, **Computers, Service Accounts, or Groups** dialog box, select **Advanced** and then click **Find Now**.
2. Select a group from the **Search results** list, and then select **OK**.
3. Select **OK** to return to the **Properties** dialog box.
4. From the **Group or user name** list, select a user or group, and then select the permissions in the **Permissions** area. Repeat for each user or group.
5. Select **OK**.

Using the material activity journal

The material activity journal (*MaterialBasedRecipe_MAJ*) is an SQL database that captures events specific to FactoryTalk Batch Material Manageroccurring during a batch run of a material-based recipe. This Material Manager-specific data is stored in the *tbActivityJournal* table and is found also in the FactoryTalk Batch event journal (*.evt*) file along with the other non-Material Manager events.

Tip: You must first enable the material logging service. See **Enable material journaling** in the *FactoryTalk Batch Components Installation and Upgrade Guide*.

Batch Event Journal Entry



Event	Action	ElementType	AttrPropertyName	NewValue	OldValue	EU	Material	Lot
Create new Promise	ADD	PROMISE	Promise ID	AREA1\S:MCLS_FR		KG	EGG_YOLK	
Create new Promise	ADD	PROMISE	Promise ID	AREA1\S:MCLS_FR		KG	SUGAR_GRANULATED	
Edit Promise	EDIT	PROMISE	Promise Amount	200	0	KG	EGG_YOLK	
Edit Promise	EDIT	PROMISE	Promise Amount	750	0	KG	SUGAR_GRANULATED	
Edit SubLot Attribute	EDIT	SUBLOT	SubLot Quantity	14250	15000	KG	SUGAR_GRANULATED	SugarCaneLot1
Consumption	REPORTING	PROMISE	SubLot Quantity	750		KG	SUGAR_GRANULATED	SugarCaneLot1
Edit Promise	EDIT	PROMISE	Promise ReportNum	1	0	KG	SUGAR_GRANULATED	SugarCaneLot1

Material Activity Journal Entry

When the FactoryTalk Batch Server is able to communicate with the Material Server, the Material Manager-specific data is sent to the material activity journal by way of a COM+ queued component that uses features of Microsoft Message Queuing (MSMQ). This queued component enables journaling even when lapses in database communication occur. If the Material Server is not ready to receive data for the material activity journal, this queued component holds the data until the Material Server is ready.

If for some reason the queued component cannot pass the Material Manager-specific data to the material activity journal, the data is stored as messages in a dead queue. If the FactoryTalk Batch Server loses communication with the Material Server, the Material Manager-specific data appears only in the Batch event journal (*.evt*) file.

Enable material journaling

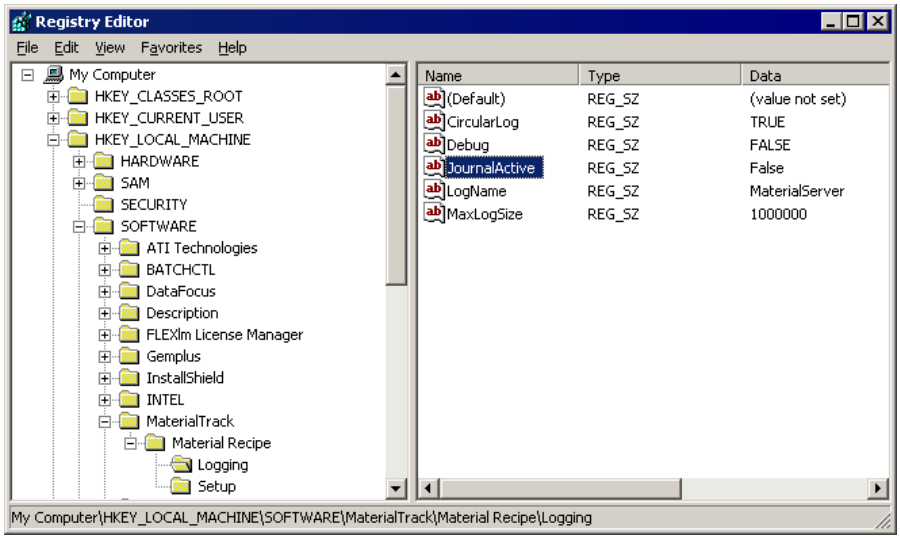
Recording activity to the Material Activity Journal is off by default. To record activity to the **MaterialBasedRecipe_MAJ** database, change the default value in the Registry on the Material Server computer.

IMPORTANT: This procedure is for **Material Manager users only.**

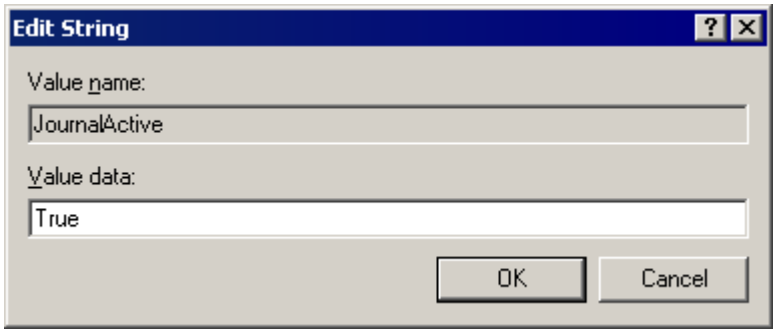
To enable material journaling

1. Select **Start > Run**.
2. In **Run**, enter **regedt32** and select **OK**. The **Registry Editor** opens.
3. Expand **HKEY_LOCAL_MACHINE** and then **Software.**
4. For a 64-bit computer, expand **Wow6432node.**

5. Navigate to the **MaterialTrack > Material Recipe > Logging** subkey.



6. Double-click the **JournalActive** subkey to open the **Edit String** dialog box.
7. To enable material logging, in **Value data**, enter **True** and select **OK**.



8. Close the **Registry Editor**.

Network Editor

The Network Editor is a utility that allows you to indicate where other ®FactoryTalk® Batch Batch and/or FactoryTalk Batch Material Manager Servers are located on the network. This network configuration information simplifies integration with other FactoryTalk products and the process of reconfiguring a multi-computer system.

During installation, the network configuration information is completed based on your responses. If you have multiple servers in your network, use the Network Editor to update the location of all your servers.

The Network Editor is installed automatically with the FactoryTalk Batch and Material Servers.

Open the Network Editor

Open the Network Editor to configure your network.

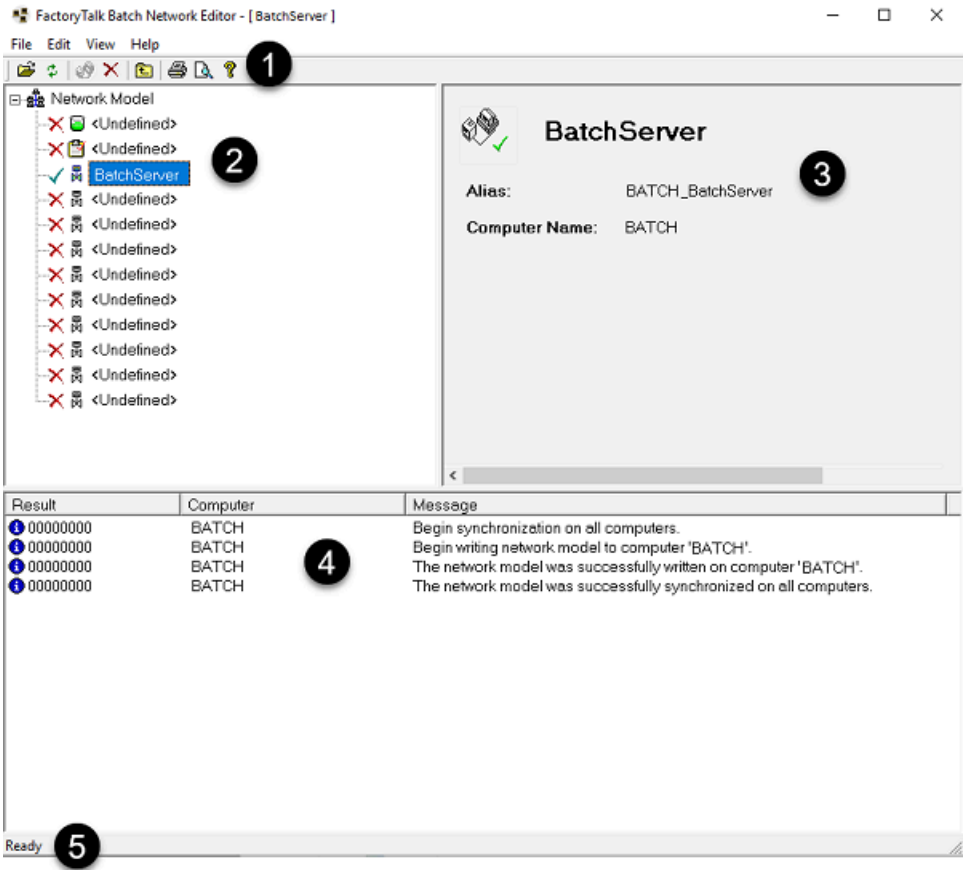
IMPORTANT: Administrator privileges are required to perform this procedure.

To open the Network Editor:

- Select **Start > Rockwell Software > Network Editor**. The **Network Editor** window opens.

Network Editor interface

This illustration identifies the different areas of the Network Editor interface:



1. Menu bar and toolbar on page 24
2. Hierarchy pane on page 22
3. Detail pane on page 23
4. Results pane on page 24
5. Status bar on page 25

Hierarchy pane

The **Hierarchy** pane provides a hierarchical view of the application servers in your FactoryTalk Batch system. The Network Model is the parent item in the hierarchy list, with the Material Server and FactoryTalk Batch Servers listed as Network Model members.

The following indicators appear next to each server listed:

✓	Indicates the server is recognized on the network
✗	Indicates the server is not defined or recognized
?	Indicates there is a problem with the server or the server's configuration

Detail pane

The **Detail** pane provides information specific to the item selected in the Hierarchy pane.

Network model information

The following items are available when **Network Model** is selected in the Hierarchy pane.

Item	Description
System Name	Allows you to name your FactoryTalk Batch system. The default is Network Model.
Network Model from	Displays the name of the computer from which the FactoryTalk Batch system was last synchronized.
Time Stamp	Displays the time of the last synchronization.
User Name	Displays the Windows user ID of the person who performed the last synchronization.
Apply Changes	Saves changes made to the FactoryTalk Batch system information.
Undo Changes	Undoes changes made to the FactoryTalk Batch system information that are not applied.
Synchronize All Application Servers	Initiates the synchronization of the application servers.

Application server information

The following items are available when a server or **Undefined** is selected in the Hierarchy pane.

Table 1. Application server information

Item	Description
Alias	Displays a user-defined alias for the selected application server.
Computer Name	Displays the computer name for the selected server.
Configure	Allows you to specify the name of the material database when using FactoryTalk Batch Material Manager. The default database is MaterialBasedRecipe.

IMPORTANT: The Network Editor does not verify database names. Changes made to the database name are immediate for the clients and servers. If the database name is invalid, the Material Editor will not open. Before changing the database name, check the spelling and synchronize the Network Editor. After changing the database name, confirm that the Material Editor opens and can read the database.

Results pane

The **Results** pane provides information messages regarding the results of the last synchronization. Included in the list is an icon indicating the type of message listed, the name of the computer that performed the synchronization, and the message generated by the synchronization process.

The table below shows icons used in the messages and explains what types of messages they represent.

	**Information**	Represents an information message.
	**Error**	Indicates an error message.
	**Warning**	Indicates a warning message.

Menu bar and toolbar

The menu bar contains the menus for **File**, **Edit**, **View**, and **Help**.

- **File menu**
  From the **File** menu, you can select a Network Model, synchronize all servers, print, and exit the Network Editor application.
- **Edit menu**
  From the **Edit** menu, you can add or remove a server from the Network Editor.
- **View menu**
  From the **View** menu, you can show or hide the toolbar/status bar, and refresh the Network Editor. You can also specify how data is viewed in the panes as well as setting other user preferences.

The Network Editor includes a toolbar which allows you to perform various functions. The buttons are enabled based on the item currently selected in the Network Editor. As you move your cursor over a button, a tool tip displays the button name and a detailed functional description displays in the status bar.

The Network Editor Toolbar buttons are:

	**Select Network Model**: Allows you to select a network model from another computer.
	**Synchronize**: Allows you to synchronize your application servers.
	**Add Server**: Allows you to add a previously undefined server.
	**Remove Server**: Allows you to remove a server.
	**Up One Level**: Moves you up one level in the Hierarchy pane.
	**Print**: Prints a report for the selected item.
	**Print Preview**: Allows you to view a report on the selected item.
	**Help**: Opens the Network Editor help.

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	**Print**: Prints a report for the selected item.
	**Print Preview**: Allows you to view a report on the selected item.
	**Help**: Opens the Network Editor help.

Status bar

The status bar at the bottom of the window displays text messages on the left side. In addition, the status bar displays one or more icons on the right side, representing the status of the application and data.

The list of states that can be displayed in the status bar:

	**Database:** The Network Editor is accessing data.
	**Server:** The Network Editor is accessing other servers.
	**Printing:** A report is being printed or previewed.
	**Processing:** The Network Editor is processing data.
	**Waiting:** The Network Editor is busy.

Configure your network

The Network Editor allows you to configure your FactoryTalk Batch system. You can add or remove application servers, print reports, and synchronize your network model with another computer.

This section provides instructions for performing these functions.

- Select a network model on page 26
- Add a server on page 26

- Remove a server on page 26
- Synchronize network models on page 27

Select a network model

When you select a network model, you are retrieving an existing network model from another computer and using it as the network model for the local computer. You must do this if you add, remove, or rename a server in your system and need to update your network model with your existing system, or if you want to use the network model from another computer.

To select a network model:

1. Open the **Network Editor**.
2. In the **Network Editor** toolbar, click the **Select Network Model** button.
3. Type the computer name in the "Enter the object name to select" area, or click the **Advanced** button to search for a computer.
4. Click **OK.**

Add a server

Use the Network Editor to add a previously undefined server.

To add a server:

1. Open the **Network Editor**.
2. In the **Hierarchy** pane, select the type of server to add.
3. Click **Add Server**.
4. In the **Alias** box, type an alias name. This is the name that displays in the Network Editor.
5. In the **Computer Name** box, type the computer name, or use the browse button to locate and select the computer from the list of computers on your domain.
6. Click the **Synchronize** button.
7. Click **OK**.

Remove a server

Use the Network Editor to remove a server from your network model.

To remove a server:

1. On the main FactoryTalk Batch server open the **Network Editor** and navigate to the root network model.
2. In the **Hierarchy** pane, select the server to remove.
3. Click the **Remove Server** button.
4. Click the **Synchronize** button. The servers listed in the model are updated with the new member server list. The server you removed is not updated.
5. Log in to the server you removed and open Network Editor.
6. Repeat steps 2 through 4 to remove the server manually.

Synchronize network models

The synchronization process copies the network model data from your computer to each of the computers included in your FactoryTalk Batch system.

Click the **Synchronize** button. The Network Editor refreshes and the results of the synchronization process display in the Results pane.

Tip: It is a good idea to synchronize after adding or removing a server from the network model.

User Preferences dialog box

The **User Preferences** function allows you to customize the behavior and appearance of the various panes and views within the Network Editor.

You can turn on information tips, change the application text/background colors, configure the various views, and set up reports used for printing.

This section provides instructions for performing these functions:

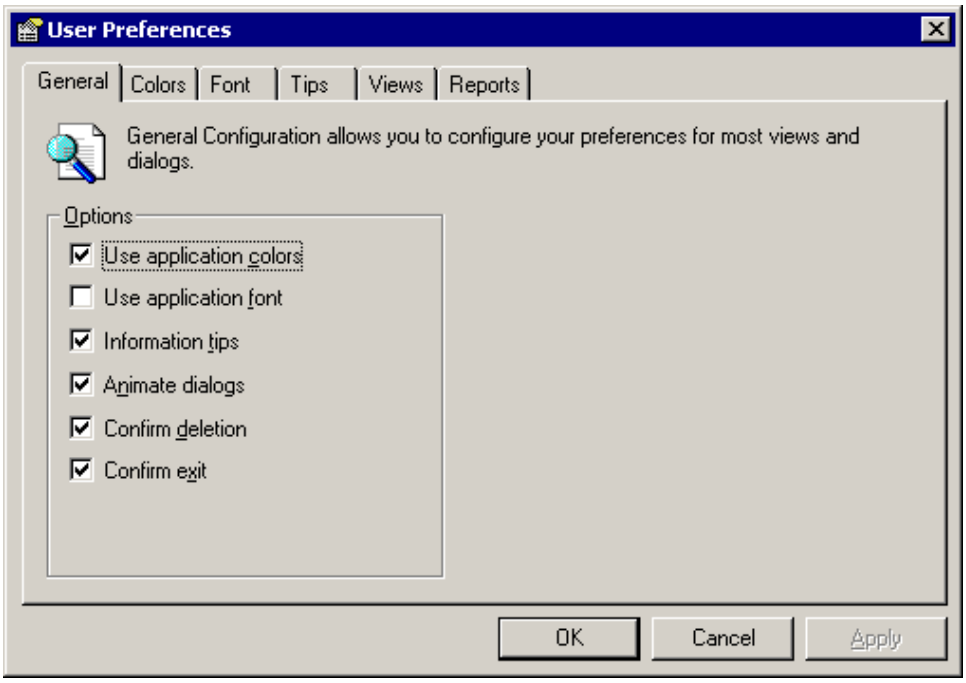
- Edit colors on page 28
- Edit the application font on page 29
- Edit information tips on page 29
- Set report preferences on page 30

See these topics for references to the **User Preferences** settings:

- User Preferences dialog box - General tab on page 28
- User Preferences dialog box - Views tab on page 30

User Preferences dialog box - General tab

The **General** tab is used to configure the basic behavior and appearance of the Network Editor views and dialog boxes. The selections on the **General** tab are used in conjunction with other sections of the **User Preferences** dialog box.



In the **Options** area, you have the following selections:

- **Use application colors:** Select to assign colors, other than the current Windows colors, to the background and text in the views.
- **Use application font:** Select to change the font, font style, and size from the default Windows style.
- **Information tips:** Select to enable single line tips that appear when you move the cursor over a button or field.
- **Animate dialogs:** Select to have dialog boxes fly out from the location from which they are opened.
- **Confirm deletion:** Select to display an "Are you sure?" message when you delete an item. Leave disabled to delete an item immediately without confirmation.
- **Confirm exit:** Select to have the application ask if you want to exit. Leave disabled to exit without a confirmation message.

Edit colors

The Network Editor defaults to the current Microsoft Windows color scheme. You can change the color of the text and background.

To edit colors:

1. Open the **Network Editor**.
2. From the **View** menu, select **User Preferences**.
3. On the **General** tab in the **User Preferences** dialog box, select **Use application colors**.
4. Select the **Colors** tab.

5. Disable **Use Windows colors** to enable the **Background color** and **Text color** lists.
6. Select the desired colors from the appropriate list, and then click **Apply**.

Edit the application font

The Network Editor defaults to the current Windows fonts. You can change the display font.

To edit the application font:

1. Open the **Network Editor**.
2. From the **View** menu, select **User Preferences**.
3. On the **General** tab in the **User Preferences** dialog box, select **Use application font**.
4. Select the **Font** tab.
5. Select the desired font, style, and size from the appropriate lists, and then click **OK**.
6. Click **Apply**.
7. Click **OK**.

Edit information tips

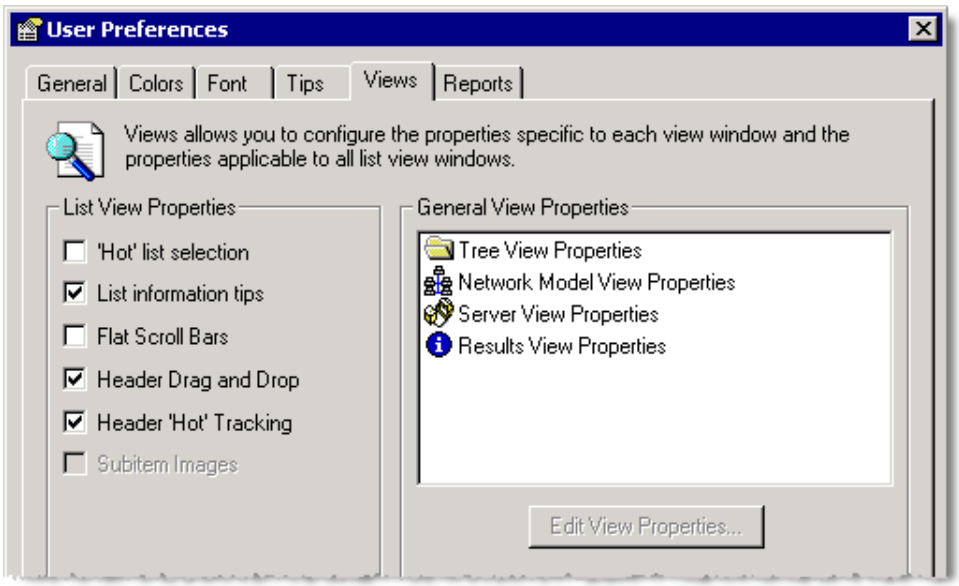
Information tips appear when you move the cursor over a button or field. You can change the font and colors of tips, and set tip timing, which determines how soon a tip displays.

To edit information tips:

1. Open the **Network Editor**.
2. From the **View** menu, select **User Preferences**.
3. On the **General** tab in the **User Preferences** dialog box, select **Information tips**.
4. Select the **Tips** tab.
5. To enable the **Background color** and **Text color** lists, disable **Use Windows colors**.
6. To change the tip color, select the text and background colors from the appropriate lists, and then click **OK**.
7. To change the tip font, click the **Change Font** button. The **Font** dialog box opens. Select the desired font, style, and size from the appropriate list, and then click **OK**.
8. To change the timing of information tips, use the **Up** and **Down** arrows to change the settings in the Timing area.
    - **Delay** determines how soon a tip displays when the cursor stops on an area with a tip.
    - **Visible duration** determines how long the tip is visible before closing.
9. Click **Apply**.
10. Click **OK**.

User Preferences dialog box - Views tab

To configure properties that are specific to each view and list in the Network Editor, use the **Views** tab. For all list views, you can enable information tips, alter the behavior of drag and drop, change the appearance of scroll bars, and set selection options. On selected views, you can change the font style and color, as well as the background color.



Set report preferences

You can define a footer to print on each report page and select the font and color (if your printer supports color printing) for the various report sections.

To set report preferences:

1. From the **View** menu, select **User Preferences**. The **User Preferences** dialog box opens to the **General** tab.
2. Select the **Reports** tab. The default report style for most views is **Formatted**.
3. To change the type of printed report, select either **List** or **Formatted** to the right of the appropriate report.

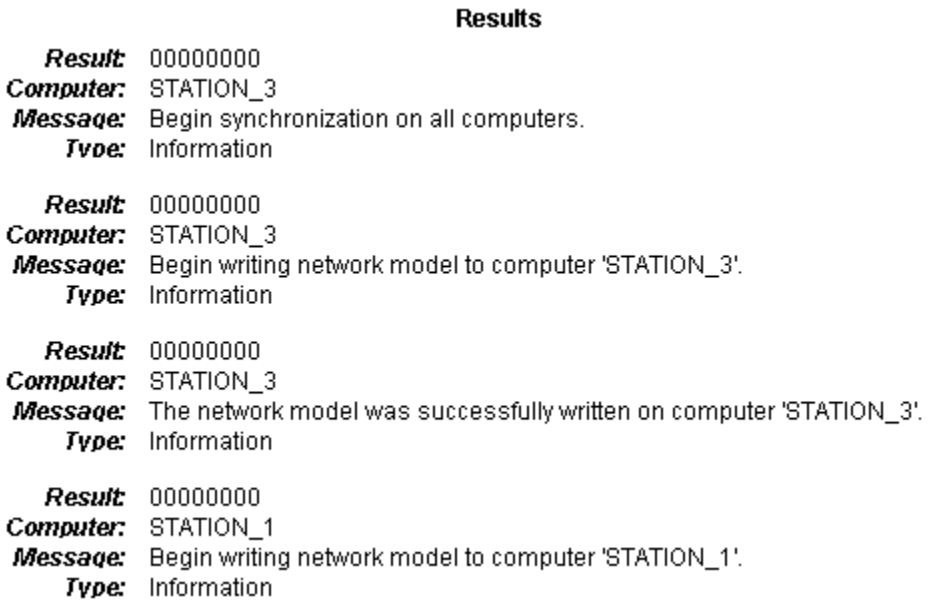
   Tip: If you select the **List** format, set the page orientation to landscape. From the **File** menu, select **Print Setup**, select **Landscape** in the Orientation area, and then click **OK**.

4. Where available, you can select **Include Related Data**, and any additional data associated with the selected item (single items only – not lists or groups) also prints on the report.
5. In the **Footer Text** box, type a word or phrase to appear centered at the bottom of each page.
6. Click **Apply**.

Report printing formats

The Network Editor report printing feature allows you to print network, server, or result pane information, in a report formatted with headers, footers and column headings (in list reports). There are two report formats available: formatted and list. The header (at the top of the page) consists of the report name, while the footer (at the bottom of the page) contains the printing date/time and the page count.

A formatted report presents the information down the page, with bold field names as shown in this figure.



Results

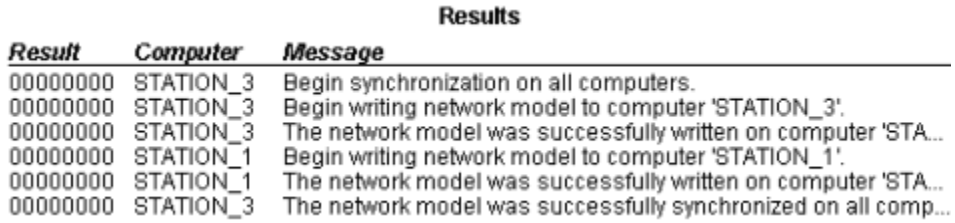
Result: 00000000
Computer: STATION_3
Message: Begin synchronization on all computers.
Type: Information

Result: 00000000
Computer: STATION_3
Message: Begin writing network model to computer 'STATION_3'.
Type: Information

Result: 00000000
Computer: STATION_3
Message: The network model was successfully written on computer 'STATION_3'.
Type: Information

Result: 00000000
Computer: STATION_1
Message: Begin writing network model to computer 'STATION_1'.
Type: Information

A list report presents the data in a columnar, spreadsheet format, with one line per data item. The field names become column headings as shown in this figure.



Results

Result	*Computer*	*Message*
00000000	STATION_3	Begin synchronization on all computers.
00000000	STATION_3	Begin writing network model to computer 'STATION_3'.
00000000	STATION_3	The network model was successfully written on computer 'STA...
00000000	STATION_1	Begin writing network model to computer 'STATION_1'.
00000000	STATION_1	The network model was successfully written on computer 'STA...
00000000	STATION_3	The network model was successfully synchronized on all comp...

You can customize the reports by setting margins, changing font styles, and selecting text colors. In addition, you can enter custom text that is also included in the footer. (See Set report preferences on page 30 for more information.)

Preview reports

The Print Preview function of the Network Editor allows you to see how a printed report looks before you send it to the printer.

To preview reports:

1. Click the **Print Preview** button. The Print Preview window opens, displaying the report as it will look when printed. The following options are available from the Print Preview window:
   - **Next Page** – If there is more than one page in the report, click **Next Page** to view the next page of the report.
   - **Prev Page** – Click to view the previous report pages (if there is more than one page in the report).
   - **Two Page** – Allows you to view two pages of a report in the same window.
   - **One Page** – Returns to the default preview setting of one page per window.

- **Zoom In/Out** – Click **Zoom In** to magnify the preview page. Click **Zoom Out** to reduce the size of the page in the preview window.
- **Close** – Closes the preview window.

2. Click **Close** to return to the Network Editor. You can either print the report or make additional report configuration changes.

Print reports

The Network Editor report printing feature allows you to print network, server, or result pane information, in a report formatted with headers, footers and column headings (in list reports).

To print reports

1. In the Network Editor's Hierarchy pane, select the list or item(s) that you want to print.
2. From the **File** menu, click **Print**. You could also click the **Print** button or press ctrl+p to display the **Print** dialog box.
3. Ensure that the correct printer is selected, and click **OK**.

Tip: To configure heading and footer fonts and add a custom footer to your reports, see Set report preferences on page 30**Set report preferences** for instructions.

Troubleshooting

This chapter contains information specific to troubleshooting the FactoryTalk Batch Material Server. (See the FactoryTalk Batch Administrator Guide for information on troubleshooting the FactoryTalk Batch Server.)

Automatic repair of batch component installation fails

This can happen if one or more necessary folders were unintentionally moved (in Windows explorer). For example, if the Schema folder gets moved away from its original install path, the install package starts up automatically and tries to 'repair' the problem. This 'repair' can clear out the Model and Server keys in the registry, which can make the Batch client editors generate warning dialogs because they are not able to find the Network Model.

If this happens, completely uninstall the application and then reinstall it.

Error: No containers match material container specification

This error can appear for several reasons. Here are a few things to check when this message appears:

- The container's state is not marked Ready to Use.
- The lot state of the sublot in the container is not marked Ready to Use.
- The material specification of the step does not match the material specification of a sublot.

Error: Unable to retrieve the Promise ID

If Material Manager offers the equipment ID of container to a recipe (A) and that container already has a Promise ID issued to another recipe (B), the recipe (A) trying to use that container goes into Hold. The operator receives the error: "Unable to retrieve the Promise ID". This prevents the inadvertent dumping of two materials into the same empty container, thus (possibly) destroying both materials.

Warning: Possible zero binding solutions

Deleting an item from an area model that is currently running on the batch server can result in batches that cannot be completed.

This warning occurs if you try to delete any of these items:

- Phase
- Container
- Material
- Equipment

Operating without a Material Server

There may be a time when communication between the FactoryTalk Batch Server and the Material Server is lost. If this occurs during a batch run, the operator can complete the batch without the Material Server.

Tip: To run material-based recipes without the Material Server, use the upper range request codes (11000-18000) in the phase logic. (For more information, see **Unable to Communicate with Material Server** in the *PCD Programming Reference Manual*.)

Because the Material Server cannot provide the FactoryTalk Batch Server with information necessary for automatic binding, the operator is prompted to select the containers/equipment modules for binding. Also, since the Material Server populates the material database with material additions and distributions, this task must be performed manually when the batch is complete.

ATTENTION: If the FactoryTalk Batch Server is configured to **Switch to Manual** and communication is lost with the Material Server, the FactoryTalk Batch Server switches to prompt binding and presents an unfiltered list of container/equipment module pairs from which to select binding candidates. The operator must select the container/equipment module pair to supply the correct material to continue processing the batch.

Failure to select the correct container/equipment module pair could result in a hazardous situation depending on the material.

Losing communication

If the FactoryTalk Batch Server is configured to **Failure and Hold** when communication is lost with the Material Server, the batch is held until communication resumes and the operator clears the failure.

If the FactoryTalk Batch Server is configured to **Switch to Manual** when communication is lost with the Material Server, the batch continues to run and the following occurs:

- All binding switches to prompt binding. Because the FactoryTalk Batch Server cannot access the information in the material database, the lists of equipment modules and containers are generated from the area model. Any other information provided by the material database, such as capacity, engineering unit, lot, and label, does not display. The operator must select the equipment module and container that can add material to or distribute material from the batch.
- The FactoryTalk Batch Server begins to use a default invalid promise ID since the Material Server cannot send a valid promise ID, which is used to update the inventory in the Material Editor. The actual amounts added or distributed in the recipe must be manually updated in the material database. In split feed situations, the FactoryTalk Batch Server continues to update the setpoint so processing can continue.
- The FactoryTalk Batch Server records Loss of Material Tracking and Loss of Material Server in the event journal. When the batch is complete, the additions and distributions must be updated manually into the material database.

(See the *FactoryTalk Material Editor User Guide* for information on updating the material database manually.)

Possible Failure and Hold Errors

When using a **Failure and Hold** configuration, and a break in communication happens after the Promise ID is required and the reporting is the first communication that fails, the Promise ID given by the Material Server may still exist in the material database. These "orphaned" Promise IDs can be a problem for several reasons.

1. A distribution type promise is limited to 1 per container. An orphaned promise of this type locks the container to other distributions.
2. Over-consumption also can be affected by this — The FactoryTalk Batch Server may assume there are active addition promises when in actuality this promise is no longer attached to a running phase.

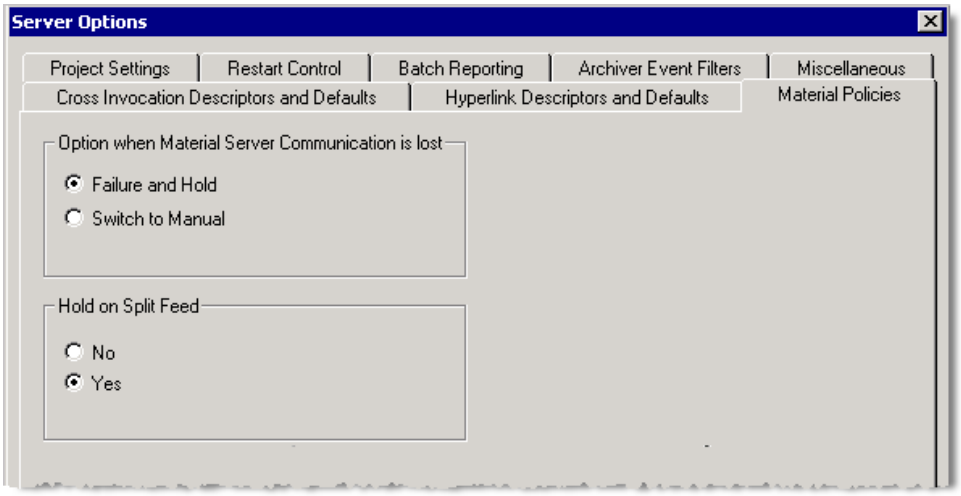
Reporting only happens once the phase transitions to a STOPPED, ABORTED or COMPLETED state.

To solve this problem, open the event journal and look for the event description "Material Distribution Database Reporting Failed - Event Type Material Tracking." Go to the tbPromise table and delete the Promise ID record that was noted in the event journal entry.

Switching to manual

Upon installation, the FactoryTalk Batch Server is configured to fail and hold a batch when communication with the Material Server is lost. If you want to run batches even when communication is lost, configure the FactoryTalk Batch Server to switch to Manual mode. In Manual mode, the FactoryTalk Batch Server prompts the operator for information normally supplied by the Material Server.

1. Click **Start > Rockwell Software > Equipment Editor**.
2. From the **Options** menu, select **Server Options**. The **Server Options** dialog box opens to the **Project Settings** tab.
3. Select the **Material Policies** tab.



1. Select **Switch to Manual**, and then click **OK**.

> **Tip:** If you are using the FactoryTalk Event Archiver, select the **Archiver Event Filters** tab while you are in the **Server Options** dialog box to verify that **Loss of Material Server** and **Loss of Material Tracking** are enabled.

2. Exit the FactoryTalk Batch Equipment Editor.

Restoring communication

When communication between the FactoryTalk Batch and Material Servers becomes available, the action of the FactoryTalk Batch Server depends on the setting selected on the **Material Policies** tab of the **Server Options** dialog box in the Equipment Editor.

- If the FactoryTalk Batch Server is configured to **Failure and Hold** the operator must clear the failure for the batch to continue processing.
- If the FactoryTalk Batch Server is configured to **Switch to Manual** the operator must restore communication manually when appropriate.

Tip: If you want to limit security on the **Failed Material Server Indicator** dialog box, disable the **Material Server Control** button for specified users or groups.

1. Double-click the Failed Material Indicator in the FactoryTalk Batch View. The **Failed Material Server Indicator** dialog box opens.
2. Click the **Material Server Control** button. The **Material Server Control** dialog box opens.
3. Select **Reestablish Communication with Material Server**, and then click **OK**.

IMPORTANT: Be aware that the material database is not synchronized with the FactoryTalk Batch Server and the data in the material database must be updated manually. (See the *FactoryTalk Material Editor User Guide* for information on updating the material database manually.)

Starting the FactoryTalk Batch server

A cold boot requires communication between the FactoryTalk Batch and Material Servers. If the Material Server is unavailable, the FactoryTalk Batch Server will not start. During a cold boot, the container, material, and material class enumerations are created based on the information in the material database. Once this information becomes resident in the FactoryTalk Batch Server, it can process a batch without the Material Server.

This material data (container, material, and material class enumerations) resident in the FactoryTalk Batch Server is referred to as persisted data. A cold boot refreshes this data by downloading new data from the material database via the Material Server. A warm or warm-all boot does not refresh this data.

If you need to restart the FactoryTalk Batch Server when the Material Server is unavailable, use either the warm or warm-all boot method. Both of these methods ensure that the container, material, and material class enumerations resident in the FactoryTalk Batch Server before the restart are restored.

(See the *FactoryTalk Batch Administrator Guide* for more information on the FactoryTalk Batch Service Manager.)

Change the server user account

Depending on your facility's security requirements you may need to change the user name and password periodically for the user accounts that the FactoryTalk Batch and Material Manager server run under. If you change the server's user account after installing the FactoryTalk Batch components you must configure your FactoryTalk Batch system to use the new server user account.

Tip: The user account for the FactoryTalk Batch server, Batch Archiver, eProcedure server services and the Batch COM+ Application must be identical. Material Manager Server can use a different server user account if necessary.

New server user account requirements

When creating a new user account for the FactoryTalk Batch or Material Manager Server, these requirements must be met.

- The password must be configured never to expire—if the password ever expires, the service eventually fails to log on.
- The user account must never be disabled or deleted—if this account is ever disabled/deleted, the service eventually fails to log on.
- If using a domain, the domain user account must have a unique name—if the user account is a domain account, remove any local user accounts with the same name.

Tip: The Material Manager Server and FactoryTalk Batch Server can use the same server user account. If they use separate accounts, the Material Manager Server account is only used on the material server computer.

Configure your FactoryTalk Batch system with the new server user account

After you create a new server user account, configure your FactoryTalk Batch system.

To configure your FactoryTalk Batch system with the new server user account:

1. Add the new server user account to the **batchsvr_group** and administrators group. By adding the new account to the **batchsvr_group** it inherits all the required user rights and access permissions.
2. If FactoryTalk Batch Material Manager is part of your system, add the new server user account to the **MTUsers** group on the Material Server computer.
3. Add the new server user account to the **FactoryTalk Batch Server** service.
4. If you are running FactoryTalk Event Archiver in incremental mode, add the new server user account in the **Batch Archiver** service.
5. If FactoryTalk eProcedure is part of your system, add the new server user account to the **eProcedure Server** service.
6. Add the new server user account to the **Batch COM** object in **Component Services > My Computer > COM+ Applications**.

Server account password change locations

If you change the password for the existing server user account, change the password in these locations:

- Change the password for the server user account in the FactoryTalk Batch server service.
  - If you are running FactoryTalk Event Archiver in incremental mode, change the password for the server user account to the **Batch Archiver** service.
  - If *e*Procedure is part of your system, change the password for the server user account in the ***e*Procedure Server** service.
- Change the password for the server user account in the **Batch** COM object in **Component Services** > **My Computer** > **COM+ Applications**.
- If FactoryTalk Batch Material Manager is part of your system, change the password for the server user account in the **MaterialTrack** COM object in **Component Services** > **My Computer** > **COM+ Applications**.

Tip: Make sure the server user account is a member of the MTUsers group on the Material Server computer.

Change the server user account for the FactoryTalk Batch Server service

To change the user account for the FactoryTalk Batch Server service, complete these steps on the server computer.

To change the server user account for the FactoryTalk Batch Server service:

1. Select **Start > Windows Administrative Tools > Services**. The **Services** dialog box opens.
2. Right-click **FactoryTalk Batch Server,** and then click **Properties**. The **FactoryTalk Batch Server Properties** dialog box opens.
3. On the **Log On** tab, select **This Account** and type the new user and/or password.
4. Select **OK**.
   - If you are using FactoryTalk Event Archiver in incremental mode, change the user account name and/or password for the **Batch Archiver** service.
   - If eProcedure is part of your system, change the user account name and/or password for the **eProcedure Server** service.
5. Close **Services**.

Change the server user account in FactoryTalk Batch COM+ applications

To change the FactoryTalk Batch Server or Material Manager Server user account in Batch COM+ applications, complete these steps on the FactoryTalk Batch Server computer.

To change the server user account in FactoryTalk Batch COM+ applications:

1. Select **Start > Windows Administrative Tools > Component Services**.
2. Expand **Component Services**, **Computers**, **My Computer** and **COM+ Applications**.
3. For FactoryTalk Batch, right-click **Batch**, and then select **Properties**. The **Batch Properties** dialog box opens.
   - On the **Identity** tab, select **This user** and type the new FactoryTalk Batch Server user name and/or password.
   - Select **OK**.

4. For FactoryTalk Batch Material Manager, right-click **MaterialTrack**, and then select **Properties**. The **MaterialTrack Properties** dialog box opens.
   - On the **Identity** tab, select **This user** and type the new Material Manager Server user name and/or password.
   - Select **OK**.

Tip: The new permissions are applied the next time the FactoryTalk Batch Server and the Material Manager Server are started. The same server user account can be used for both servers.

Change the server user account in My Computer properties

To change the server user account in **My Computer** properties, complete these steps on the FactoryTalk Batch client computers.

To change the server user account in My Computer properties

1. Select **Start > Windows Administrative Tools > Component Services**.
2. Expand **Component Services** and **Computers**.
3. Right-click **My Computer**, and then select **Properties**. The **My Computer Properties** dialog box opens.
4. On the **COM Security** tab, select **Edit Default** in the **Access Permissions** area. The **Access Permission** dialog box opens.
5. Select **Add** to open the **Select Users, Computers, or Groups** dialog box.
6. Type the new server user account name and then select **OK**.
7. In the **Access Permission** dialog box, select the new server user account. In the **Permissions** list, select **Allow** for Local Access and Remote Access.
8. Select **OK** twice.

Tip: If you are using separate user accounts for FactoryTalk Batch Server and Material Manager Server, repeat steps 5 - 8 to add the additional server user account.

9. Close **Component Services**.
10. Restart the computer.

Rockwell Automation Support

Use these resources to access support information.

Technical Support Center	Find help with how-to videos, FAQs, chat, user forums, and product notification updates.	rok.auto/support
Knowledgebase	Access Knowledgebase articles.	rok.auto/knowledgebase
Local Technical Support Phone Numbers	Locate the telephone number for your country.	rok.auto/phonesupport
Literature Library	Find installation instructions, manuals, brochures, and technical data publications.	rok.auto/literature
Product Compatibility and Download Center (PCDC)	Get help determining how products interact, check features and capabilities, and find associated firmware.	rok.auto/pcdc

Documentation feedback

Your comments help us serve your documentation needs better. If you have any suggestions on how to improve our content, complete the form at rok.auto/docfeedback.

Waste Electrical and Electronic Equipment (WEEE)

At the end of life, this equipment should be collected separately from any unsorted municipal waste.

Rockwell Automation maintains current product environmental information on its website at rok.auto/pec.

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BWMTR-UM011G-EN-P - January 2025
Supersedes Publication BWMTR-UM011F-EN-P - May 2022