

Experion HS Supplementary Installation Tasks Guide

EHDOC-X138-en-410A
July 2013

Release 410

Document	Release	Issue	Date
EHDOC-X138-en-410A	410	0	July 2013

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Contents

Changing computer names	7
About computer names	8
Changing a Flex Station computer name checklist	9
Changing the computer name	9
Changing the Experion account passwords	10
Resetting the log on accounts for DCOM Servers and services	11
About this guide	13
Installing HMIWeb Display Builder	15
Changing the security settings of an Experion server	17
Setting up a third-party OPC client or server	19
Installing a remote third-party OPC client checklist	20
Installing a remote third-party OPC server checklist	22
Installing the OPC Server Connect package	24
Creating the Windows mngr account	25
Creating the third-party OPC Windows account	26
Configuring DCOM on the Experion OPC server	27
Configuring DCOM to receive OPC callbacks	28
Configuring DCOM on a third-party OPC server	29
Configuring OPC Server Service Settings	31
Controlling read/write access	32
Setting up Microsoft Excel for reports checklist	35
Installing Microsoft Excel	36
Installing Microsoft Excel or Microsoft Office service packs	37
Disabling the Deny log on locally policy for the Local Servers account	38
Setting up Microsoft Excel for Excel Reports	39
Setting up Microsoft Excel for Batch Reports	42
Installing the Experion ODBC client	44
Setting up network printers for Microsoft Excel reports	45
Re-enabling the Deny log on locally policy for the Local Servers account	46
Setting up a file server checklist	47
Setting up a shared folder	48

Assigning a drive letter on a client computer to a shared folder	49
Changing license and server configuration details	51
Changing the Experion license	52
Changing the displays search path, history archive, and history restore search folders	53
Changing the report paper type or report font	54
Configuring the database setup	55
Adjusting History retention	55
Adjusting sizing of non-licensed items	55
Common Experion tasks	57
Starting and stopping Experion servers	58
Stopping Experion services	60
Using the Experion PKS Services Control Panel	60
Displaying the Computer Management services console	61
Start and stop services using a command line (ssservices.exe)	61
Configuring a Systech terminal server	63
Specify the IP Address	65
Logging into the Terminal Server using Internet Explorer	66
Changing the TCP/IP Address	67
Configuring the Router/Gateway Address	68
Configuring the TCP keep alive timer	70
Configuring Serial Ports	71
Adding the IP address to the server's hosts file	73
Upgrading the Systech Terminal Server to Current Release	74
Configuring the Terminal Server for use with Fast Failover	75
Connecting Controllers	76
Installing specialized hardware on a computer	77
Installing a printer	78
Installing a printer driver for a local printer	79
Installing a printer driver for a local shared printer	79
Installing a printer driver for a shared network printer (with a suitable share name)	80
Installing a printer driver for a shared network printer (whose existing share name is unsuitable)	81
Setting up the print job spool folder	82
Creating a guest account	82
Serial adapter installation checklist	83
Installing a Stallion EasyConnection	83
Connecting an integrated keyboard (IKB) to an OEP/IKB adapter	85
Connecting an integrated keyboard (IKB) to a USB port	86
To configure the USB Serial port	86
Notices	89

Documentation feedback	90
How to report a security vulnerability	91

CONTENTS

Changing computer names

You can change a computer name *after* the installation of the Experion software. However, you can only change the computer name *prior* to the configuration of the node, and only for the following nodes:

- Flex Station



Attention

You cannot change the computer name of Experion servers.



CAUTION

If you rename the computer after you have started configuring Experion server, you will need to either reinstall Experion server or possibly even restore the computer from a backup.

Related topics

“About computer names” on page 8

“Changing a Flex Station computer name checklist” on page 9

About computer names

Every Experion node (for example, Experion server and Flex Station computers) must have a unique name and IP address. The unique name must comply with the following rules:

- The length of the node name must comply with the table below.
- The name must begin with an alphabetic character, such as a to z, or A to Z.
- The name must not contain spaces or other non-standard characters.
- The names of redundant server pairs consist of a common ‘base name’ (which must follow the other naming restrictions), plus an ‘A’ suffix for the primary server and a ‘B’ suffix for the backup server.

For example, if the base name of the redundant servers is HSSERV:

- The name of the primary server is HSSERVA.
- The name of the backup server name is HSSERVB.
- The node name must not end with ‘A’ or ‘B’. (The use of A and B as the last letter in a name is reserved for naming redundant servers.)
- To avoid potential confusion, the node name should not end with a ‘0’ or ‘1’, as these numbers are used in *hosts* files to identify redundant links.

Table 1: Length of node name for Dual Ethernet networks

Node type	Dual Ethernet
Flex Station	14 characters ¹ Example: <i>HSCSTN010</i>
Redundant Experion server	13 characters ² Example: <i>HSCSVR01A0</i>
Non-redundant Experion server	14 characters ³ Example: <i>HSCSVR010</i>

¹ The last character is reserved for 0/1 redundant link suffix.

² The last two characters are reserved for A/B redundant server suffix and the 0/1 redundant link suffix.

³ The last character is reserved for 0/1 redundant link suffix.

Changing a Flex Station computer name checklist

You can rename a Flex Station computer before starting any configuration tasks on these computers.



CAUTION

You can only rename a Flex Station computer before configuring the Experion software. If you rename the computer after you have started configuration tasks for the Experion software, the Experion software on the computer will become unstable and you will need restore the computer from a backup or reinstall the Experion software.

The following topics describe how to change the computer name for a Flex Station computer.

Related topics

“Changing the computer name” on page 9

“Changing the Experion account passwords” on page 10

“Resetting the log on accounts for DCOM Servers and services” on page 11

Changing the computer name

This is part of the change computer name procedure on nodes where changing the computer name is supported.

Prerequisites

- You understand the computer name restrictions.

To change the computer name

- 1 Log on to the computer using a Windows account with local administrator rights.
- 2 Do one of the following:

Option	Description
Windows Server 2008	<ol style="list-style-type: none"> 1. Choose Start > Server Manager 2. If prompted, click Continue in the User Account Control dialog box. 3. Under Computer Information in the Server Summary, click the Change System Properties link. The System Properties dialog box appears.

Option	Description
Windows 7	<ol style="list-style-type: none"> 1. In the Windows Control Panel large or small icon view, click System. 2. Under Computer name, domain, and workgroup settings, click Change settings. <p>The System Properties dialog box appears.</p>
3	Click the Change button. The Computer Name/Domain Changes dialog box appears.
4	In the Computer name box, type the new computer and then click OK .
5	If a restart your computer message dialog box appears, click OK .
6	Click OK in the System Properties dialog box.
7	In the restart your computer message dialog box, click Yes to restart the computer. After the computer restarts, an unable to locate dll event message may be displayed. This message can be ignored. Click OK to continue.

Changing the Experion account passwords

Account passwords must meet the following rules:

- Passwords must be minimum of six characters and a maximum of 32 characters.
- Passwords cannot contain the user's account name or any part of the user's full name that exceeds two consecutive characters.
- Passwords must contain characters from three of the following four categories:
 - English uppercase characters (A through Z)
 - English lowercase characters (a through z)
 - Base 10 digits (0 through 9)
 - Non-alphabetical characters (-@#\$\$%^&+=~!*()_+={|:;\"<>,.?/)

To change the Experion account passwords

- 1 In Windows Explorer, browse to *<install folder>\Honeywell\Experion PKS\utilities\pwdutil*, where *<install folder>* is the location where Experion is installed, and then double-click on *pwdutil.exe*.
- 2 In the **User Account Control** dialog box, click **Yes**.
The **Change Password Utility** window appears. On this window is a button for each Experion account.
- 3 Click on the account name for which the password has to be changed.
The **Password Information** dialog box appears.

- 4 In the **Password** and **Confirm Password** boxes, type the account password, and then click **OK**.
This does not need to be a new password. You can type the current password for this account. The password must follow the rules described above.
- 5 Once you have completed changing the account password(s), click **Done**.
A **WARNING** message appears.
- 6 Click **OK** to close the warning message box.

Resetting the log on accounts for DCOM Servers and services

You need to reset any existing account names that include the old computer name.

To change the log on account and password

- 1 Choose **Start > All Programs > Honeywell Experion PKS > System Management > Windows Services & DCOM Servers Log on Tool**.
- 2 In the **User Account Control** dialog box, click **Yes**.
The **Set Log on Account and Password on Servers** window appears.
- 3 In the **Account Name** list, select an account associated with the old computer name (the account name is *<old computer name>\<account name>*).
The account name appears in the **User Name** box.
- 4 In the **User Name** box, edit the account name, replacing the old computer name with the new computer name (the updated account name should be *<new computer name>\<account name>*).
- 5 In the **Password** box, type the password for the account.
This does not need to be a new password. You can type the current password for this account.
- 6 Click **Apply New Account**.
- 7 Repeat steps 3 to 5.
- 8 Once all accounts have been updated, click **Cancel**.

About this guide

This guide describes how to complete additional tasks once you have completed an initial installation or upgrade of Experion.

Intended audience

This guide is for people who are installing an Experion system.

Prerequisite skills

You should have completed planning your Experion system, and know the Experion components that you have licensed and need to install and configure. You should also know how to complete system administration tasks in the Windows operating system.

Related documents

For more information about installing Experion, see:

- *Software Installation User's Guide*
- the Experion migration documentation

Installing HMIWeb Display Builder

This section describes how to install the HMIWeb Display Builder software on a computer, without the need for installing all Station or server software.

To install HMIWeb Display Builder

- 1 Insert the Experion R410 media into the appropriate drive.
- 2 In Windows Explorer, browse to **Packages > ServerClient > station** and double-click **HMIWeb Station and Display Builder.msi**.
- 3 On the **HMIWeb Station and Display Builder** welcome screen, click **Next**.
- 4 On the **Customer Information** screen, type the **User Name** and **Organization**.
- 5 On the **Destination Folder** screen, click **Next**.
- 6 On the **Setup Type** screen, select **Custom**, and then click **Next**.
- 7 On the **Custom Setup** screen, select **HMIWeb Display Builder**, and then click **Next**.
- 8 On the **Ready to Install the Program** screen, click **Install**.
The HMIWeb Station and Display Builder are installed.
- 9 On the **InstallShield Wizard Complete** screen, click **Finish**.
- 10 If prompted, click **Yes** to restart the computer.
The computer restarts.

Changing the security settings of an Experion server

The Windows operating system provides security measures that include enhanced RPC, DCOM, and Windows Firewall settings.

While these security features are supported by Experion R410, some of the settings need to be modified if your system includes any one of the following:

- OPC connections (for example, HSC OPC Server, or other third-party OPC connections).

To ensure that your Experion system operates correctly if you have any of the above nodes in your system, the Experion R410 installation process modifies the default Windows operating system security settings. This modification at installation time sets the initial security of your Experion nodes to “unrestricted” mode.

You can check the current security settings of a given node, and if appropriate, change them from “unrestricted” to “restricted” mode to tighten the modified security settings.

Setting up a third-party OPC client or server

This section describes how to set up a third-party OPC client or third-party OPC server on a remote computer to communicate with an Experion server.



Attention

If you are installing the third-party OPC software on an Experion server, follow the instructions supplied by the manufacturer; there are no additional configuration steps required. Additional configuration is only required when you are installing third-party OPC software on a remote computer.

If you are installing third-party OPC software on a remote computer, follow the appropriate instructions for your installation.

To install a third-party	Go to
OPC client	“Installing a remote third-party OPC client checklist” on page 20
OPC server	“Installing a remote third-party OPC server checklist” on page 22

Related topics

- “Installing a remote third-party OPC client checklist” on page 20
- “Installing a remote third-party OPC server checklist” on page 22
- “Installing the OPC Server Connect package” on page 24
- “Creating the Windows mngr account” on page 25
- “Creating the third-party OPC Windows account” on page 26
- “Configuring DCOM on the Experion OPC server” on page 27
- “Configuring DCOM to receive OPC callbacks” on page 28
- “Configuring DCOM on a third-party OPC server” on page 29
- “Configuring OPC Server Service Settings” on page 31
- “Controlling read/write access” on page 32

Installing a remote third-party OPC client checklist

This section describes the steps to install a third-party OPC client on a remote computer.

For more information about OPC, see the “Configuring OPC” section of the *Server and Client Configuration Guide*.

Prerequisites

- The relevant installation media, license, and documentation for the third-party OPC software.
- Experion R410 media.
- You must be logged on to the computer using a Windows account with local administrator rights.

Tasks

Task	Go to	Done?
Install the third-party OPC client software on the remote computer using the instructions supplied by the manufacturer.		
Install the Experion OPC Server Connect package on the remote computer.	“Installing the OPC Server Connect package” on page 24	
Create the Windows mngr account on the computer where you installed the third-party OPC client.	“Creating the Windows mngr account” on page 25	
<p>If the Windows account that the third-party OPC client runs under is unknown to the Experion server, create that Windows account on the server.</p> <p>The Windows account will be unknown to the Experion server in any of the following situations</p> <ul style="list-style-type: none"> • The Windows account is a workgroup account. • If the computers are on the same domain but the Windows account that the third-party OPC client runs under is local to the remote computer, rather than a domain account. • If the computers are on different domains. 	“Creating the third-party OPC Windows account” on page 26	
Configure the Experion OPC server's DCOM settings to grant access to the Windows account that the third-party OPC client runs under.	“Configuring DCOM on the Experion OPC server” on page 27	


Task	Go to	Done?
Specify the third-party OPC client's read/write access.	“Controlling read/write access” on page 32	
For third-party OPC clients running Microsoft Windows version 6 or later, configure DCOM settings to receive OPC callbacks.	“Configuring DCOM to receive OPC callbacks” on page 28	
If the third-party OPC client connects with redundant Experion servers, install Redirection Manager.	“Installing Redirection Manager”	

Installing a remote third-party OPC server checklist

This section describes the steps to install a third-party OPC server on a remote computer. After installing the third-party OPC server, refer to the “Configuring OPC” section in the *Server and Client Configuration Guide* for further information.

Third-party OPC servers can either be run as:

- A service, or
- A foreground application (when it requires an application to be launched).

**Attention**

- The instructions for configuring DCOM security settings and OPC Server service settings apply only to third-party OPC servers running as a service. For third-party servers not running as a Windows service, refer to the third-party server documentation.

If the third-party server application includes a means to control the runtime behavior of the server, including starting and stopping the server, then it is advisable to restrict the server's DCOM configuration so that only local launch is permitted. That is, always utilize the third-party vendor's utilities to control the server and disallow remote launch from external clients, which may cause the server to start in an improper state.

Prerequisites

- The relevant installation media, license, and documentation for the third-party OPC software.
- You must be logged on to the computer using a Windows account with local administrator rights.

Tasks

Task	Go to	Done?
Install the third-party OPC server software on the remote computer using the instructions supplied by the manufacturer.		
Create a Windows mngr account on the computer where you installed the third-party OPC server.	“Creating the Windows mngr account” on page 25	

Task	Go to	Done?
<p>If the Windows account that the third-party OPC server runs under is unknown to the Experion server, create that Windows account on the server.</p> <p>The Windows account will be unknown to the Experion server in any of the following situations</p> <ul style="list-style-type: none"> • The account is a workgroup account. • If the computers are on the same domain, however, the Windows account that the third-party OPC server runs under is local to the remote computer, rather than a domain account. • If the computers are on different domains. 	<p>“Creating the third-party OPC Windows account” on page 26</p>	
<p>Configure the third-party OPC server's DCOM settings to:</p> <ul style="list-style-type: none"> • Define security permissions (this only applies to an OPC Server running as a service). • Grant access to the Windows mngr account. 	<p>“Configuring DCOM on a third-party OPC server” on page 29</p>	
<p>Configure the OPC Server Service Settings.</p>	<p>“Configuring OPC Server Service Settings” on page 31</p>	

Installing the OPC Server Connect package

For an Experion server to communicate with a third-party OPC client, you must install the OPC Server Connect package on the computer where the third-party OPC client is installed.

Prerequisites

- *Software Installation User's Guide (SIUG).*

To install the OPC Server Connect package

- For instructions on how to install the OPC Server Connect package, see the “Installing optional features” topic of the “Optional features” section of the *Software Installation User's Guide*.

Creating the Windows mngr account

This section describes how to create the Windows mngr account.

To create the Windows mngr account

- 1 Choose **Start**, right-click **Computer** and choose **Manage**.
- 2 Expand the **System Tools** item and then expand the **Local Users and Groups** item.
- 3 Click **Users**.
- 4 Choose **Action > New User** to open the **New User** dialog box.
- 5 In the **User Name** box, type **mngr**.
- 6 In the **Full Name** box, type **Experion Server Manager**.
- 7 In the **Password** and **Confirm Password** boxes, type the password for this user.
The Windows mngr account password must be the same on all computers.
- 8 Clear the **User must change password at next logon** check box and then select the **Password never expires** check box.
- 9 Click **Create** to add the account.
- 10 Close the **Computer Management** dialog box.

Creating the third-party OPC Windows account

This section describes how to create the Windows account that the third-party OPC software runs under on another computer.

Prerequisites

- The name and password of the Windows account that the third-party OPC software runs under.

To create the third-party OPC Windows account

- 1 Choose **Start**, right-click **Computer** and choose **Manage**.
- 2 Expand the **System Tools** item and then expand the **Local Users and Groups** item.
- 3 Click **Users**.
- 4 Choose **Action > New User** to open the **New User** dialog box.
- 5 In the **User Name** box, type the Windows account that the third-party OPC software runs under.
- 6 In the **Full Name** box, type a meaningful name for this account.
- 7 In the **Password** and **Confirm Password** boxes, type the password for this account. The Windows account password must be the same on all computers.
- 8 Clear the **User must change password at next logon** check box and then select the **Password never expires** check box.
- 9 Click **Create** to add the account.
- 10 In the **Local Users and Groups** item, click **Groups**.
- 11 Double-click the **Product Administrator** group to display the **Product Administrator Properties** dialog box.
- 12 Click **Add** to display the **Select Users or Groups** dialog box.
- 13 Click the name of the Windows account you have created and then click **Add**.
- 14 Click **OK**.
- 15 Click **OK** to close the **Product Administrator Properties** dialog box.
- 16 Close the **Computer Management** dialog box.

Configuring DCOM on the Experion OPC server

This section describes how to configure the DCOM settings on the Experion OPC server to grant access to the Windows account that the third-party OPC client runs under.


To configure DCOM on an Experion server

- 1 Choose **Start > All Programs > Accessories > Run** to display the **Run** dialog box.
- 2 Type **dcomcnfg** and click **OK** to display the **Distributed COM Configuration Properties** dialog box.
- 3 In the **Applications** list, click the OPC server you want to configure (**Experion OPC Server** through **Experion OPC Server 5**), and then click **Properties**.
- 4 Click the **Security** tab.
- 5 Click **Customize** in the **Access Permissions** group, and then click **Edit**.
- 6 Click **Add** to display the **Select Users, Computers or Groups** dialog box.
- 7 If the Experion server and the third-party OPC client computer are on different Windows domains, click **Location** and select the name of the Experion server from the correct domain.
- 8 In the **Enter the object names to select** box, type the name of the Windows account that the third-party OPC client is running under.
- 9 Click **Check name**.
- 10 Click **OK**.
- 11 In the **Permissions for [account name]** box, allow **Local Access** and **Remote Access** for the account that was added.
- 12 Click **OK** to close the **Access Permission** dialog box.
- 13 In the **Properties** window for the Experion OPC Server, click **Customize** in the **Launch and Activation Permissions** group, and then click **Edit**.
- 14 Repeat steps 6 to 11 to add the Windows account that the third-party OPC client is running under.
- 15 In the **Permissions for [account name]** box, allow **Local Launch**, **Remote Launch**, **Local Activation** and **Remote Activation** for the account that was added, and then click **OK** to close the **Launch Permission** dialog box.
- 16 Close the **Distributed COM Configuration Properties** dialog box.

Configuring DCOM to receive OPC callbacks

For any node running Microsoft Windows version 6.0 or later and hosting an OPC client application, it is necessary to configure DCOM settings so that it can receive OPC callbacks.

To configure DCOM callbacks

- 1 Choose **Start > Run** to open the **Run** dialog box.
- 2 Type **dcomcnfg** and click **OK** to open the **Component Services** dialog box.
- 3 Click **Component Services**, then **Computers**, and then **My Computer**.
- 4 Click the  (**Configure My Computer**) toolbar button to open the **My Computer** dialog box.
- 5 Click the **COM Security** tab.
- 6 In the **Access Permissions** section, click **Edit Limits**.
The **Access Permission** dialog box appears.
- 7 Select **ANONYMOUS LOGON**, and then select the **Allow** check box for **Remote Access**.
- 8 Click **OK**.
- 9 Click **Apply**.
- 10 Close the **My Computer** dialog box.
- 11 Close the **Component Services** dialog box.



Stop

You have completed this task. Return to the checklist that led to this task.

For more information about OPC callbacks, see the 'About the OPC Data Access standard' topic in the *Server and Client Configuration Guide*.

Configuring DCOM on a third-party OPC server

This section describes how to configure the DCOM settings on a third-party OPC server to grant access to the Windows mngr account.

When the target server is running as a service, you need to set the DCOM launch permissions to exclude all users except the local SYSTEM account so that the service can only be started and stopped using the local service control. If the service is set to enable DCOM launch permissions for remote users, then a remote connection request will cause the service process to start if it is not presently running. This can result in initialization problems for the service and a problematic connection for the client.

To configure DCOM on a third-party OPC server

- 1 Choose **Start > All Programs > Accessories > Run** to display the **Run** dialog box.
- 2 Type **dcomcnfg** and click **OK** to display the **Distributed COM Configuration Properties** dialog box.
- 3 In the **Applications** list, click the name of the third-party OPC server and then click **Properties**.
- 4 If you are setting up a third-party OPC Server to run as a service, click the **Security** tab.
If you are setting up a third-party OPC Server to run as a foreground application, got to step 11.
- 5 In the **Launch and Activate Permissions** group, click **Customize** and then click **Edit**.
- 6 In the **Launch Permissions** dialog box, set the permissions for users follows and then click **OK**.

Administrator: Allow **Local Activation**

Network: Allow **Local Activation** and **Remote Activation**

Mngr: Allow **Local Activation** and **Remote Activation**

Network Service: Allow **Local Activation** and **Remote Activation**

System: Allow **Local Launch** and **Local Activation**

- 7 In the **Access Permissions** group, click **Customize** and then click **Edit**.
- 8 In the **Access Permissions** dialog box, set the permissions for users as follows and click **OK**:

Administrator: Allow **Local Access**

Network: Allow **Local Access** and **Remote Access**

Mngr: Allow **Local Access** and **Remote Access**

Network Service: Allow **Local Access** and **Remote Access**

System: Allow **Local Launch** and **Local Access**

- 9 In the **Configuration Permissions** group, click **Customize** and then click **Edit**.
- 10 In the **Change Configuration Permission** dialog box, set the permissions for users as follows and then click **OK**.

Administrator: Allow **Full Control** and **Read**

Creator/Owners: Deny **Full Control** and **Read**

Power Users: Deny **Full Control** and **Read**

System: Allow **Full Control** and **Read**

Users: Deny **Full Control** but allow **Read**

- 11 Click the **Identity** tab of the **Properties** sheet.
- 12 Click **This user** and then click **Browse**.
- 13 In the **Select User** dialog box, select the local mangr account and close the dialog box.
- 14 On the **Identity** tab, enter and confirm the password for the local mngr account and click **Apply** to apply the settings and close the **Properties** sheet.

Configuring OPC Server Service Settings

To configure OPC Server service settings

- 1 Choose **Start > All Programs > Accessories > Run** to display the **Run** dialog box.
- 2 Type **services.msc** and click **OK**.
- 3 In the list of services, click the name of the third-party OPC server and then click **Properties**.
- 4 Click the **Recovery** tab and choose the following settings:
 - First failure: Restart the Service**
 - Second failure: Restart the Service**
 - Subsequent failure: Restart the Service**
 - Reset fail count after: 0 days**
 - Reset service after: 1 minutes**
- 5 Click **Apply** to apply the settings, and then click **OK** to close the **Properties** sheet.

Controlling read/write access

By default, any OPC client connected to the Experion OPC server has full read and write access to the Experion point database. It is possible to deny OPC clients read/write access to the Experion point database based on the Windows account that the third-party OPC client runs under.

To deny read/write access for a Windows account

- 1 On the Experion server, use Windows Explorer to locate the following files in the <data folder>\Honeywell\ProductConfig\Security, where <data folder> is the location where Experion data is stored. For default installations, <data folder> is C:\ProgramData.

For this ProgID...	...choose these files
HWHsc.OPCServer	XPKSOPCRead
	XPKSOPCWrite
	XPKSOPCHDARead
HWHsc.OPCServer2	XPKSOPCRead2
	XPKSOPCWrite2
	XPKSOPCHDARead2
HWHsc.OPCServer3	XPKSOPCRead3
	XPKSOPCWrite3
	XPKSOPCHDARead3
HWHsc.OPCServer4	XPKSOPCRead4
	XPKSOPCWrite4
	XPKSOPCHDARead4
HWHsc.OPCServer5	XPKSOPCRead5
	XPKSOPCWrite5
	XPKSOPCHDARead5

- 2 For each file
 - a Right-click it and choose **Properties** to display the **Properties** dialog box.
 - b Click the **Security** tab.
 - c Click **Add** to display the **Select Users of Groups** dialog box.
 - d Click the Windows account name that you want to deny access and then click **Add**.

- e Click **OK**.
- f In the **Permissions** list, select all check boxes displayed in the **Deny** column.
- g Click **OK**.

It is not possible to deny read access to a Windows account while giving write access to the same Windows account. If a Windows account is denied read access, any third-party OPC clients that run under that Windows account are denied access to the Experion point database. It is possible, however, to only deny write access to a Windows account.

Setting up Microsoft Excel for reports checklist

The following topics describes how to set up Microsoft Excel reports using either Microsoft Excel Data Exchange (MEDE) or the Experion ODBC driver.

Related topics

- “Installing Microsoft Excel” on page 36
- “Installing Microsoft Excel or Microsoft Office service packs” on page 37
- “Disabling the Deny log on locally policy for the Local Servers account” on page 38
- “Setting up Microsoft Excel for Excel Reports” on page 39
- “Setting up Microsoft Excel for Batch Reports” on page 42
- “Installing the Experion ODBC client” on page 44
- “Setting up network printers for Microsoft Excel reports” on page 45
- “Re-enabling the Deny log on locally policy for the Local Servers account” on page 46

Installing Microsoft Excel

If you install Microsoft Excel on a remote computer (that is, a computer other than the server), it uses the full name of the primary server when requesting information from the server.

**Attention**

- Microsoft Office 2010 is available as 32-bit and 64-bit versions. Honeywell supports only the 32-bit version of Office 2010 for both 32-bit and 64-bit operating systems.
-

Prerequisites

- Microsoft Office or Microsoft Excel installation media.
- You must be logged on to the computer using a Windows account with local administrator rights.

To install or upgrade Microsoft Excel

- 1 Insert the Microsoft Office or Microsoft Excel installation media into the computer.
- 2 In Windows Explorer, browse to the drive and double-click on the *setup.exe* file.
- 3 Follow the on-screen instructions to complete the installation.

**Attention**

- If you plan to use Microsoft Excel to fetch data from Experion with the ODBC Driver, you must perform a custom install and choose to install **Microsoft Query**, located in the Office Tools folder.
 - When installing Microsoft Office on Experion nodes, note the following:
 - Select the **Custom Installation** option.
 - Select **Office shared feature**. This is necessary to ensure that VBA is installed.
 - Do not install Microsoft Outlook on Experion server nodes.
-

- 4 Restart the computer.

Installing Microsoft Excel or Microsoft Office service packs

Prerequisites

- You have the latest supported Microsoft Office service pack for your version of Microsoft Office or Microsoft Excel.



Tip

You can download Microsoft Office service packs from the following location: <http://office.microsoft.com/Downloads/default.aspx>, or you can order Microsoft Office service pack media from Microsoft.

- You may also need the Microsoft Office or Microsoft Excel installation media, depending on which version is installed and how you installed it.

To install the Microsoft Office service pack

- 1 Close any applications that are running.
- 2 In Windows Explorer, browse to the folder containing the Microsoft Office service pack, and double-click on the *setup.exe* file.
- 3 Follow the on-screen instructions to complete the installation.
- 4 Restart the computer.

Related topics

“Disabling the Deny log on locally policy for the Local Servers account” on page 38

“Re-enabling the Deny log on locally policy for the Local Servers account” on page 46

“Setting up Microsoft Excel for Batch Reports” on page 42

Disabling the Deny log on locally policy for the Local Servers account

There may be times when you need to perform Windows configuration tasks that use the Windows *MNGR* account. By default, Experion prevents this account from logging on locally to the computer by enforcing the Windows **Deny log on locally** security policy. Therefore, you need to disable the security policy temporarily so that you can perform your configuration tasks. Immediately after completing your tasks, you must re-enable the **Deny log on locally** security policy.



CAUTION

This procedure changes the Windows security policy and allows the Windows *MNGR* account to log on locally to this computer, which is a potential security risk.

You should only use this procedure when you need to perform Windows configuration tasks. Once complete, you must change the security policy back to its previous state. If you fail to do this, anyone who has knowledge of the Windows *MNGR* or LocalComServer account passwords could have privileged access to this computer.

- 1 Log on to the computer using a Windows account with local administrator rights.
- 2 Choose **Start** and type **secpol.msc** in the search box.
The **Local Security Policy** window appears.
- 3 Expand the **Local Policies** item and then click on the **User Rights Assignment** item.
- 4 Double-click on the **Deny log on locally** policy.
The **Deny log on locally Properties** window appears.
- 5 Click the **Local Servers** item, and then click **Remove**.
- 6 Click **OK**.
- 7 Close the **Local Security Policy** window.

Next steps

- Complete your Windows configuration tasks.
- Re-enable the **Deny log on locally** security policy for the *Local Servers* account.

Related topics

- “Re-enabling the Deny log on locally policy for the Local Servers account” on page 46
- “Installing Microsoft Excel or Microsoft Office service packs” on page 37
- “Setting up Microsoft Excel for Batch Reports” on page 42

Setting up Microsoft Excel for Excel Reports

If you are setting up Microsoft Excel for usage with Excel Reports, you need to ensure Microsoft Excel is setup correctly under the *MNGR* account.

Prerequisites

- Microsoft Excel is installed, but not yet started.
- You have followed the procedures to temporarily disable the **Deny log on locally** policy for the *Local Servers* account.

See the topic “Disabling the Deny log on locally policy for the Local Servers account” on page 38 for more information.



CAUTION

When following this procedure, you must complete all the steps, including the final steps to restore Local Servers to the Deny log on locally policy. If you fail to do this, anyone who has knowledge of the Windows *MNGR* or LocalComServer account passwords could have privileged access to this computer.

To set up Microsoft Excel for Excel Reports

- 1 Log on to the Windows operating system using the Windows *MNGR* account.
- 2 In Windows Explorer, go to `<install folder>\Honeywell\Experion PKS\Client\X1dataex`.
Where `<install folder>` is the location where Experion is installed.
- 3 Right-click on the *excel reports.reg* file, and choose **Merge**.
If prompted, enter the password for a Windows administrator user.
- 4 Close Windows Explorer.
- 5 Do the following:
 - a Choose **Start > Run**.
The **Run** dialog box appears.
 - b In the **Open** box, type the following:
`<install folder>\Honeywell\Experion PKS\Client\X1dataex\activatemedev.vbs`
Where `<install folder>` is the location where Experion is installed.
- 6 Click **OK**.
Type the *MNGR* password, if prompted. Ignore any failure to write to log error.
The Microsoft Office installation application may start.
- 7 Choose **Start > Run**.
The **Run** dialog box appears.

- 8 In the **Open** box, type the following:
`<folder_to_excel_executable>\excel.exe`
 and then click **OK**.

Office version	Example
----------------	---------

Office 2007	For Office 2007, where the default installation folder is <i>C:\Program Files (x86)\Microsoft Office\Office12\Excel.exe</i> , you would type:
--------------------	---

	C:\Program Files (x86)\Microsoft Office\Office12\Excel.exe
--	---

Office 2010	For Office 2010, where the default installation folder is <i>C:\Program Files (x86)\Microsoft Office\Office14\Excel.exe</i> , you would type:
--------------------	---

	C:\Program Files (x86)\Microsoft Office\Office14\Excel.exe
--	---

Office 2013	For Office 2013, where the default installation folder is <i>C:\Program Files (x86)\Microsoft Office\Office15\Excel.exe</i> , you would type:
--------------------	---

	C:\Program Files (x86)\Microsoft Office\Office15\Excel.exe
--	---

- 9 Start Microsoft Excel, if not already started.
- 10 If prompted, complete the details in any Microsoft Excel dialog boxes, such as typing the user name and initials, and selecting the help and Windows update options.
- 11 Choose **Office Icon > Excel Options**.
 The **Excel Options** window appears.
- 12 Click **Trust Center**.
- 13 Click **Trust Center Settings**.
 The **Trust Center** window appears.
- 14 Click **Add-ins** on the left side of the window.
- 15 Clear all the add-in check boxes.
- 16 Click **OK** to close the **Trust Center** window.
- 17 Click **Add-Ins** on the left side of the **Excel Options** window.
- 18 Under the **Active Application Add-ins** group, check that **MEDE** is listed.
- 19 If MEDE (Microsoft Excel for Data Exchange) is not listed, do the following:
 - a In the **Manage** list, click **Excel Add-ins**.
 - b Click **Go**.
 The **Add-Ins** dialog box appears.
 - c Install the MEDE add-in.
- 20 Click **OK** to close the **Excel Options** window
- 21 Close Microsoft Excel.

- 22 If you have a Microsoft Excel file that you want to use as input to the report, confirm that you can open this file in Microsoft Excel and that no Microsoft Excel dialog boxes appear when you open the file.

If you don't have an existing Microsoft Excel file, you can skip this step.

To open the Microsoft Excel report, you will need to open the file using the **Run** dialog box.

For example, you would type:

```
C:\Program Files (x86)\Microsoft Office\Office12\excel.exe \"C:\ProgramData\Honeywell\Experion PKS\Server\Data\Report\MyExcelReportTemplate001.xls\"
```

Note the back slash character (\) before the quote characters (") that enclose the path to the Microsoft Excel file.

- 23 Log off the Windows operating system and log on using a Windows account with administrator privileges.

Next steps

- Re-enable the **Deny log on locally** security policy for the *Local Servers* account.

See the topic “Re-enabling the Deny log on locally policy for the Local Servers account” on page 46 for more information.

Setting up Microsoft Excel for Batch Reports



Attention

Follow this procedure if you are setting up Microsoft Excel to only run Batch Reports.
If you want to run Batch Reports as well as Excel Reports, do not follow this procedure.
Instead, see the topic “Setting up Microsoft Excel for Excel Reports” on page 39.

Prerequisites

- Microsoft Excel is installed, but not yet started.
- You have followed the procedures to temporarily disable the **Deny log on locally** policy for the *Local Servers* account.

See the topic “Disabling the Deny log on locally policy for the Local Servers account” on page 38 for more information.



CAUTION

When following this procedure, you must complete all the steps, including the final steps to restore Local Servers to the Deny log on locally policy. If you fail to do this, anyone who has knowledge of the Windows *MNGR* or LocalComServer account passwords could have privileged access to this computer.

To set up Microsoft Excel for Batch Reports

- 1 Start Microsoft Excel.
If prompted, complete the details in any Microsoft Excel dialog boxes, such as typing the user name and initials, and selecting the Help and Windows update.
- 2 Do one of the following:

Option	Description
Microsoft Excel 2007	Close Microsoft Excel.
Microsoft Excel 2010	1. Restart Microsoft Excel for the changes to take effect. 2. Close Microsoft Excel.

Next steps

- Re-enable the **Deny log on locally** security policy for the *Local Servers* account.
See the topic “Re-enabling the Deny log on locally policy for the Local Servers account” on page 46 for more information.

Related topics

“Disabling the Deny log on locally policy for the Local Servers account” on page 38

“Re-enabling the Deny log on locally policy for the Local Servers account” on page 46
“Installing Microsoft Excel or Microsoft Office service packs” on page 37

Installing the Experion ODBC client

For Microsoft Excel, Microsoft Access applications, and other applications to access Experion server data using the Experion ODBC driver, you need to install the ODBC client on the same computer as the application.

If the application is installed on the Experion server, you do not need to install the ODBC client as it is already installed as part of the Experion installation. However, if the application is on another computer, you must install the ODBC client on that computer.

Prerequisites

- *Software Installation User's Guide (SIUG).*

To install the ODBC client

- For instructions on how to install the ODBC client, see the “Installing optional features” topic of the “Optional features” section of the *Software Installation User's Guide*.

Next steps

After installing the ODBC client, configure the Experion ODBC driver. For more information, see the *Server and Client Configuration Guide*.

Setting up network printers for Microsoft Excel reports

If you want to print Microsoft Excel reports to a network printer, you must be logged on using the Windows *MNGR* account when configuring that printer. Printers configured using other accounts cannot be used because the connection to the network print queue will not always be visible to other accounts on the same computer.

Prerequisites

- Microsoft Excel is installed.
- You have followed the procedures to temporarily disable the **Deny log on locally** policy for the *Local Servers* account.

See the topic “Disabling the Deny log on locally policy for the Local Servers account” on page 38 for more information.



CAUTION

When following this procedure, you must complete all the steps, including the final steps to restore Local Servers to the Deny log on locally policy. If you fail to do this, anyone who has knowledge of the Windows *MNGR* or LocalComServer account passwords could have privileged access to this computer.

To set up network printers for Microsoft Excel reports

- 1 Log on to the computer using the Windows *MNGR* account.
- 2 Configure the printer.
For more information about configuring printers, see the “Configuring printers checklist” topic in the “Printers” section of the *Server and Client Configuration Guide*.
- 3 Log off the Windows operating system and log on using a Windows account with administrator privileges.

Next steps

- Re-enable the **Deny log on locally** security policy for the *Local Servers* account.
See the topic “Re-enabling the Deny log on locally policy for the Local Servers account” on page 46 for more information.

Re-enabling the Deny log on locally policy for the Local Servers account

This procedure reinstates the Windows security policy that prevents the Windows *MNGR* account from logging on locally to this computer.

- 1 Log on to the Windows operating system using a Windows account with administrator privileges.
- 2 Choose **Start** and type **secpol.msc** in the search box.
The **Local Security Policy** window appears.
- 3 Expand the **Local Policies** item and then click on the **User Rights Assignment** item.
- 4 Double-click on the **Deny log on locally** policy.
The **Deny log on locally Properties** window appears.
- 5 Click **Add User or Group**.
The **Select Users, Computers, Service Accounts, or Groups** window appears.
- 6 Click **Locations**.
The **Locations** window appears.
- 7 In the **Location** list, select the computer name, and then click **OK**.
- 8 Click **Object Types**.
The **Object Types** window appears.
- 9 Select the **Groups** check box and click **OK**.
- 10 In the **Enter the object names to select** box, type **Local Servers**.
- 11 Click **Check Names** and ensure that the name can be resolved.
- 12 Click **OK**.
- 13 Click **OK** to close the **Deny log on locally Properties** window.
- 14 Close the **Local Security Policy** window.
- 15 Log off the Windows operator system and log on as an Experion user.

Related topics

- “Disabling the Deny log on locally policy for the Local Servers account” on page 38
- “Installing Microsoft Excel or Microsoft Office service packs” on page 37
- “Setting up Microsoft Excel for Batch Reports” on page 42

Setting up a file server checklist

A file server allows other computers to share its files over a network. Experion uses the file-sharing capabilities of the Microsoft Windows Network.

Experion uses a file server to store displays.

Tasks

Task	Go to	Done?
Set up the folder as a shared folder.	“Setting up a shared folder” on page 48	
On each computer that needs access to the shared folder, assign a drive letter.	“Assigning a drive letter on a client computer to a shared folder” on page 49	

Related topics

“Setting up a shared folder” on page 48

“Assigning a drive letter on a client computer to a shared folder” on page 49

Setting up a shared folder

To set up a shared folder

- 1 Log on to the computer using a Windows account with local administrator rights.
- 2 In Windows Explorer, right-click the folder you want to share and choose **Share**.
- 3 Select the user(s) who will be able to access this folder and click **Add**.
- 4 Click **Share**. A progress bar displays.
- 5 When the share is successful, click **Done**.
- 6 Click **OK** to share the folder, and then close the dialog box.

Assigning a drive letter on a client computer to a shared folder

In order for a client computer to access to files in a shared folder, you must assign a drive letter to the shared folder.

To assign a drive letter on a client computer

- 1 In Windows Explorer, select **Computer** and click **Map Network Drive**. The Map Network Drive dialog box appears.
- 2 In the **Drive** list, select an unassigned letter.
- 3 Click **Browse** and browse to the shared folder and click **OK**.
- 4 Click **Finish**.

SETTING UP A FILE SERVER CHECKLIST

Changing license and server configuration details

The following topics describe supplementary tasks that are either part of an installation or upgrade, or can be completed, if required, after an installation.

Related topics

“Changing the Experion license” on page 52

“Changing the displays search path, history archive, and history restore search folders” on page 53

“Changing the report paper type or report font” on page 54

“Configuring the database setup” on page 55

Changing the Experion license

This section describes how to change the Experion license.

Prerequisites

- The new Experion license.
- You have backed up the database, especially if the database size is being changed.
- Some major license changes require you to run the setup program from Experion Application DVD. The setup program will notify you if this is the case.
- If you have a redundant server system, you have to perform this procedure on each server.

To change the Experion license

- 1 Log on to the server using a Windows account with local administrator rights.
- 2 Stop the Experion server in **Database Only** mode.
- 3 Choose **Start > All Programs > Honeywell Experion PKS > Server**, then right-click **Experion PKS Server Configuration Panel** and choose **Run as administrator**.

The **Experion PKS Server Configuration Panel** dialog box appears.

- 4 Click **View License**.
The license details dialog box appears.
- 5 Click **Change License**.
- 6 Type the new system and authorization numbers.
- 7 Click **OK**.
- 8 Click **Close**.
- 9 Click **OK** to close the **Experion PKS Server Configuration Panel** dialog box.

Related topics

“Starting and stopping Experion servers” on page 58

Changing the displays search path, history archive, and history restore search folders

Prerequisites

- Changing the folders requires you to stop and restart the Experion server.

To change the folder

- 1 Log on to the server using a Windows account with local administrator rights.
- 2 Choose **Start > All Programs > Honeywell Experion PKS > Server**, then right-click **Experion PKS Server Configuration Panel** and choose **Run as administrator**.

The **Experion PKS Server Configuration Panel** dialog box appears.

- 3 In the appropriate box, type the path to the folder, or click **Browse** and then browse to the location of the folder, select it, and then click **OK**.
- 4 Click **OK** to close the **Experion PKS Server Configuration Panel** dialog box.
- 5 Stop the Experion server and unload the database.
- 6 Return the Experion server to system running status.

Changing the report paper type or report font

Prerequisites

- Changing the report paper type or report font requires you to stop and restart the Experion server.

To change the report paper type or report font

- 1 Log on to the server using a Windows account with local administrator rights.
- 2 Choose **Start > All Programs > Honeywell Experion PKS > Server**, then right-click **Experion PKS Server Configuration Panel** and choose **Run as administrator**.

The **Experion PKS Server Configuration Panel** dialog box appears.

- 3 In the **Report paper type** list, select the new report paper size.
- 4 In the **Report font** list, click the new report font.
- 5 Click **OK** to close the **Experion PKS Server Configuration Panel** dialog box.
- 6 Stop the Experion server and unload the database.
- 7 Return the Experion server to system running status.

Related topics

“Starting and stopping Experion servers” on page 58

Configuring the database setup

After installing Experion, you can adjust the database sizing for history samples and other non-licensed items to meet your system's requirements.

Related topics

“Adjusting History retention” on page 55

“Adjusting sizing of non-licensed items” on page 55

Adjusting History retention

You can adjust history retention periods, including the duration and number of samples, with the *sysb7d* utility. For details about this utility, see the *Server and Client Configuration Guide*.

For more information about history collection refer to the "History collection" section of the *Server and Client Planning Guide* and the "History collection and archiving" section of the *Server and Client Configuration Guide*.

Adjusting sizing of non-licensed items

You can adjust the sizing of non-licensed items, so that the sizing meets your needs, with the *sysb7d* utility. The following table lists the non-licensed items whose sizing you can adjust. For details about this utility, see the *Server and Client Configuration Guide*.



Attention

Because some non-licensed items affect disk space and memory requirements, you need to take care when setting their sizes.

Item	Default number	Max number	Additional disk space required/item (kilobytes)
Algorithm blocks	6,000	6,000	0
Areas	1,000	1,000	0
Concurrent alarms	1,000	1,000	0
Concurrent delays	1,000	1,000	0
Concurrent messages	1,000	1,000	0
Controller channels	90	99	0
Controllers	100	255	0

Item	Default number	Max number	Additional disk space required/item (kilobytes)
Dynamic objects on named displays	300	300	0
Event Summary	32,000	32,767 ⁴	0.25
Groups	16,000	16,000	0
Number of application tasks	80	80	0
Number of user files	3	150	User defined
Operators	400	1,000	0
Point control schedules	1,000	1,000	0
Point lists	2,000	2,000	0
Printer connections	50	50	0
Recipes	500	32,767	1
Reports	1,000	1,000	0
Sequence of event (SOE) entries	1,000	32,767	0.25
Stored delays	2,000	32,767	0.1
Trends	3,000	3,000	0

⁴ The maximum configurable size of the online Event Summary.

Common Experion tasks

Related topics

“Starting and stopping Experion servers” on page 58

“Stopping Experion services” on page 60

Starting and stopping Experion servers

You can stop and start Experion servers using the **Experion PKS Server** dialog box.



CAUTION

To avoid synchronization issues while Experion servers are offline, and while services are stopped, avoid making engineering changes to the system, such as adding controllers or changing tag names.

In addition, it is best practice to bring Experion servers back online in the reverse order in which they were taken offline. This also helps to reduce database-related synchronization issues.

To stop the Experion server

- 1 Choose **Start > All Programs > Honeywell Experion PKS > Server > Start-Stop Experion PKS Server**.

The **Experion PKS Server** dialog box appears.

Simple mode	Full mode

- 2 If the **Experion PKS Server** dialog box appears in simple mode, click the icon to the left of the title bar, and choose **Advanced > Full mode**.
- 3 There are three stop modes available in Full mode; **Database Unloaded**, **Database & Daemons**, and **Database Only**
Click the stop mode specified in the task or step that led you to this task.
- 4 If prompted, click **Yes** to confirm the action.
Wait for the server to change its state. It may take several minutes for the Experion server to stop.

To start the Experion server

- 1 Choose **Start > All Programs > Honeywell Experion PKS > Server > Start-Stop Experion PKS Server**.

The **Experion PKS Server** dialog box appears.

- 2 If the **Experion PKS Server** dialog box appears in simple mode, click the icon to the left of the title bar, and choose **Advanced > Full mode**.
- 3 To start the Experion server, click **System Running**.
- 4 If prompted, click **Yes** to confirm the action.

Wait for the Experion server to change its state. It may take several minutes for the Experion server to start.

Related topics

“Changing the Experion license” on page 52

“Changing the report paper type or report font” on page 54

Stopping Experion services

This section describes how to stop Experion services on a computer.



CAUTION

To avoid synchronization issues while servers are offline, or while services are stopped, avoid making Engineering changes to the system, such as adding controllers or changing tag names.

In addition, it is best practice to bring servers back online in the reverse order in which they were taken offline. This also helps to reduce database-related synchronization issues.

Related topics

“Using the Experion PKS Services Control Panel” on page 60

“Displaying the Computer Management services console” on page 61

“Start and stop services using a command line (ssservices.exe)” on page 61

Using the Experion PKS Services Control Panel

This control panel provides the following options:

- Start/stop SQL services.
- Start/stop Engineering Tool services.
- Start/stop Server/Station services.
- Start/stop common components infrastructure/TPS services.
- Start/stop all Experion services.

Prerequisites

- The Experion PKS Services Control Panel can be accessed by the following methods
 - If you have installed Experion, in the *<install folder>\Honeywell\Experion PKS\Utilities\ssservices* folder, double-click the *ssservices.exe* file, where *<install folder>* is the location where Experion is installed.
 - In the Experion Application DVD, go to the *Packages\Utilities\ssservices* folder and double-click the *ssservices.exe* file.

To use the Experion PKS Services Control Panel

- 1 Open the Experion PKS Services Control Panel.

See the *Prerequisites* section above for more information on how to start this utility.

- 2 Click the required start or stop command option.
- 3 Click **OK**.
A message displays the success of stopping the services.

Displaying the Computer Management services console

To display the Computer Management Services Console

- 1 Click **Start**, right-click the **Computer** and choose **Manage**.
- 2 Expand the **Services and Applications** item.
- 3 Click the **Services** item.
The services are displayed on the right pane of the console. Most Experion-related process names are prefixed with “Experion”.

Start and stop services using a command line (ssservices.exe)

Description

Using the **ssservices.exe** command, you can start and stop Experion services from a command line, or use the command in *.bat* files.

Syntax

ssservices.exe {-start_sql | -start | -start_hsc | -start_cc | -start_all | -stop_sql | -stop | -stop_hsc | -stop_cc | -stop_all} [*path_to_ssstatus.txt*]

Arguments	Description
-start_sql	Start SQL services.
-start	Start Engineering Tools services.
-start_hsc	Start Experion server services.
-start_cc	Start all common component infrastructure services.
-start_all	Start all services (SQL services, Engineering Tools services, Experion server services, and all common component infrastructure services).
-stop_sql	Stop SQL services.
-stop	Stop Engineering Tools services.
-stop_hsc	Stop Experion server services.
-stop_cc	Stop all common component infrastructure services.

Arguments	Description
-stop_all	Stop all services (SQL services, Engineering Tools services, Experion server services, and all common component infrastructure services).
<i>path_to_ssstatus.txt</i>	The path to the folder where the <i>ssstatus.txt</i> . This file contains the output of the command. If this path is not specified, the output is displayed in the command window. If the path contains spaces, the path should be contained within quotes.

Example

```
"<install folder>\Honeywell\Experion PKS\Utilities\SSServices
\ssservices.exe" -start_hsc "<install folder>\Honeywell\Experion PKS
\Install"
```

Where *<install folder>* is the location where Experion is installed.

This example will start Experion server services. The *ssstatus.txt* file located in the *<install folder>\Honeywell\Experion PKS\Install* folder will contain the output of the command.

Configuring a Systech terminal server

This section describes how to configure a Systech NDS—5016RM or NDS—6204 terminal server so that the server can communicate with devices, such as controllers, connected to its serial ports.

Prerequisites

- You have installed the Systech terminal server as described in the *NDS/5000 and NDS/6000 Hardware Manual*.
- You have installed the NativeCOM software.

Tasks

Task	Go to	Done?
Specify the Systech's IP address.	"Specify the IP Address" on page 65	
Log on to the Systech via Internet Explorer.	"Logging into the Terminal Server using Internet Explorer" on page 66	
Change the TCP/IP settings.	"Changing the TCP/IP Address" on page 67	
If the Systech is connected to the Experion server via a router, configure the route from the Systech to the Experion server.	"Configuring the Router/Gateway Address" on page 68	
Configure the TCP keep alive timer.	"Configuring the TCP keep alive timer" on page 70	

Task	Go to	Done?
Configure the Systech's serial ports.	"Configuring Serial Ports" on page 71	
Connect controllers as required.	"Connecting Controllers" on page 76	

Related topics

"Specify the IP Address" on page 65

"Logging into the Terminal Server using Internet Explorer" on page 66

"Changing the TCP/IP Address" on page 67

"Configuring the Router/Gateway Address" on page 68

"Configuring the TCP keep alive timer" on page 70

"Configuring Serial Ports" on page 71

"Adding the IP address to the server's hosts file" on page 73

"Upgrading the Systech Terminal Server to Current Release" on page 74

"Configuring the Terminal Server for use with Fast Failover" on page 75

"Connecting Controllers" on page 76

Specify the IP Address

You specify the Systech's IP address using the NativeCOM software. The NativeCOM software and manual are available on the media you received with your Systech terminal server, or from the Systech web site (<http://www.systech.com>)

Prerequisites

- NativeCOM software is installed.

To specify the IP address

- 1 Log on to the server using a Windows account with local administrator privileges.
- 2 Click **Start > All Programs > NativeCOM > NativeCOM Configuration Utility**.
- 3 In the Port Server group, click **Add**.
The **Add Multiple NativeCOM Ports** dialog box appears, containing a list of the Systech terminal servers available on your local network. Some terminal servers running older software will not appear in this list.
- 4 If the Systech terminal server appears in the **Step 1 — Select a port server** list, click on the IP address/Hostname value and type the new IP address. Continue to step 9.
- 5 If the Systech terminal server does not appear in the **Step 1 — Select a port server** list, click **Add Unlisted Port Server**.
- 6 In the **Existing IP Address/Hostname** box, type the currently assigned IP address of the Systech terminal server.
- 7 Click **Assign IP Address**.
- 8 Type the Ethernet Address and the New IP Address of your Systech Terminal Server and click **Assign IP Address**.
After assigning an IP address the Add Port Server dialog box will appear.
- 9 In the **Step 1 - Select a port server** area, click the terminal server.
- 10 In the **Step 2 - Configure the port template** area, type a name for the serial ports and click **Driver Settings**.
- 11 In the **Driver Settings** dialog box, make sure only **Write Errors on Failed Network Connection** is selected and clear the **Retain Network Connection After Close** check box, and then click **OK**.
- 12 In the **Step 3 - Select COM ports** area, leave the defaults.
Although this dialog will assign virtual COM ports COM3 and COM4, this feature of the terminal server must not be used. The Experion terminal server driver must be used instead.
- 13 Click **OK** and then click **Close**.

Logging into the Terminal Server using Internet Explorer

Once your terminal server's IP address is configured it is recommended to continue the configuration of the terminal server using Microsoft Internet Explorer.

To log on using Internet Explorer

1 Start Microsoft Internet Explorer.

2 In the address bar type: **//a.b.c.d**

Where *a.b.c.d* is the IP address of your Systech terminal Server. For example: //220.0.0.1.

The main configuration menu appears.

Changing the TCP/IP Address

If you ever reconfigure your network, you have to define the Systech's new TCP/IP address.

To change the TCP/IP address

- 1 Click the **IP Address** link.
- 2 Type the IP address and IP Netmask addresses.
- 3 Click **Apply Changes**.
- 4 Click **Save Changes**.

You need to restart the terminal server for the new settings to take effect. Do this by cycling the power.

Configuring the Router/Gateway Address

If your Systech terminal server is connected to the Experion server via a router, you need to configure the route from the terminal server to the Experion server.



Attention

For the terminal server to be able to be reached by all computers on a different subnet, use that subnet's router or gateway address, as the destination address in the terminal server.

To configure the gateway

- 1 Click the **Routing/Gateways** link.
- 2 Type the Destination address.
This is the address of your Experion Server.
- 3 Type the Gateway address.
This is the address of the router that the terminal server communicates with.
- 4 From the Flags options, select **net**.
“net” indicates that the destination IP address is a computer on the specified network.
- 5 In Metric, specify the number of jumps to reach the destination address.
- 6 From the Gateway type options, select **address**.
Address indicates that the Gateway is an address.
- 7 Click **Add Entry**.
- 8 Click **Save Changes**.
- 9 You need to reboot the terminal server for the new settings to take effect. Do this by cycling the power.

Example

Your server is connected and has IP address 192.168.0.3 and the Systech Terminal Server is connected and has IP address 220.0.0.1.

The settings would be

Parameter	Value
Destination	192.168.0.3
Gateway	220.0.0.240
Flags	net
Metric	1

Parameter	Value
Gateway Type	address

Configuring the TCP keep alive timer

It is highly recommended that you configure the TCP keep alive timer. This will ensure that a TCP connection will quickly be released if one side of the connection is terminated abnormally. The TCP keep alive timer is essential in redundant systems where it is vital that the backup server can connect to the terminal server if the server acting as primary fails.

To configure the TCP keep alive timer

- 1** Click the **TCP Keep Alive** link.
- 2** Set the **tcp_keepidle** to 10.
This sets the keep alive timer to 10 seconds.
- 3** Set the **tcp_keepcnt** to 8.
This sets the number of TCP keep alive packets.
- 4** Click **Apply Changes**.
- 5** Click **Save Changes**.

Configuring Serial Ports

To configure the serial ports

- 1 Click the **Port Parameters** link.
- 2 Click either **Port 1** or **Port 2**.
- 3 Use the following table to set the ports characteristics.

Command	Option	Typical Setting
Baud	300 to 115,200	9600
Inactivity Timeout	0 (default)	60
Character size	5 6 7 8	8
Stop Bits	1 2	1
Parity	None Even Odd Mark Space	None
Interface Type	RS-232 RS-422 RS-485	RS-232
Flow Control	Input Software Flow Control Output Software Flow Control RTS/CTS Hardware Flow Control DTR/DSR Hardware Flow Control	No to all
Need DCD to open port	Ignore Required	Ignore

Command	Option	Typical Setting
Reverse-Telnet (RTN)	Enabled	Enabled
	Disabled	

- 4 After you have made the changes, click **Apply Changes**.
- 5 Click **Save Changes**.

Adding the IP address to the server's hosts file

You must add the IP address and name of the Systech to the server's hosts file.

To add the IP address to the hosts file

- 1 Log on to the server using a Windows account with local administrator.
- 2 Choose **Start > All Programs > Accessories > Command Prompt** to open a Command Prompt window.
- 3 At the command prompt, change to the folder for the hosts file.
For example:

```
cd %windir%\system32\drivers\etc
```

- 4 Open the hosts file by typing:

```
notepad hosts
```

- 5 Move to the last line and type:

```
a.b.c.d terminal_server_name
```

where *a.b.c.d* is the IP address and *terminal_server_name* is the TCP Host Name. You must specify this name in Quick Builder when configuring a controller that is connected to this Systech terminal server.

For example:

```
220.0.0.1 systech
```

After editing the server's hosts file, it is recommended that you confirm that the computer can resolve the name that you have added.

To confirm the information added to the hosts file

- 1 Choose **Start > All Programs > Accessories > Command Prompt** to open a Windows Command Prompt window.
- 2 At the command prompt, type

```
ping terminal_server_name
```

where *terminal_server_name* is the TCP Host Name which you added to the hosts file.

For example:

```
ping systech
```

Upgrading the Systech Terminal Server to Current Release

The Systech terminal server software consists of the following components

- Firmware—boot-time code
- Operational Software—run-time code
- Factory Configuration—the configuration to return to if you corrupt your current configuration

To upgrade the Systech

- 1 Download the latest files from the Systech web site, . Save these files in a location accessible during the upgrade.
- 2 Choose **Start > All Programs > NativeCOM > Port Server Utilities**.
- 3 If the Systech terminal server is not listed, do the following:
 - a Click **Add Unlisted Port Server**.
 - b In the **Existing IP Address/Hostname** box, type the IP address of the terminal server and click **Add this Port Server**.
- 4 Click the **Update/Reboot Unit** tab.
- 5 In **BDNL Files to Update**, type the path of the file that will update the terminal server.
- 6 Select **Reboot unit (required for new BDNL to take effect)**.
- 7 Click the terminal server from the list.
- 8 Click **Update/Reboot Unit**.

Configuring the Terminal Server for use with Fast Failover

In a redundant server system, the backup server must be able to communicate with the field devices as soon as it becomes the primary server.

Terminal servers implement the concept of a *TCP keep alive timer*. The TCP keep alive timer ensures that the terminal server automatically disconnects and frees a connection to one of its ports if communication with the server is lost (if the server fails or the network connection is broken). This enables the backup server to take over communication with the field devices.

Once the keep alive time has expired, a keep alive packet is sent from the Systech terminal server to the server. The interval between these keep alive packets is the greater of 2 seconds and the keep alive time/96. If the server does not respond to a configured number of keep alive packets the terminal server assumes that the connection has been broken and it allows the backup server to establish a connection.

This means that the Systech terminal server will free up a connection to one of its ports if communication with a server has been lost for the keep alive time + number of keep alive packets * 2 seconds. That is, for a 10-second keep alive time, the connection to one of its ports is freed up after 26 seconds of lost communication with the server (assuming the number of keep alive packets is 8).

The following table shows the recommended settings for the keep alive time and the number of keep alive packets for various redundant server configurations.

	Servers configured for:		
	Normal failover communicating with terminal servers on a high-speed LAN	Fast failover communicating with terminal servers on a high-speed LAN	Normal or fast failover communicating with terminal servers on low- speed WAN
Recommended keep alive time (seconds)	10	5	20
Recommended number of keep alive packets	8	3	8

Connecting Controllers

This section provides general instructions on connecting controllers to a Systech. Note that you must also read the appropriate *Controller References* to see if there are any specific restrictions applicable to the controllers you want to connect.

Cabling

For cable wiring information that is specific to the controller that you are connecting to this terminal server, see the controller's interface reference guide.

Configuring the Port in Quick Builder

You use Quick Builder to configure each controller that is connected to the Systech.

The following properties (see Port tab) are specific to a Systech.

Property	Description
Port Type	Click Terminal Server.
Terminal Server TCP Host Name	The name you defined in the server's hosts file for the Systech to which the controller is connected. If you have not added the terminal server's details to the hosts file, you can type its IP address.
Terminal Server TCP Port No	The number of the TCP port to which the controller is connected, which is equal to 8000 plus the serial port number. For example, if the controller is connected to serial port 2, you would type 8002 .
Idle Timeout	Leave at 180 sec.

Installing specialized hardware on a computer

The topics in this section describe how you install or configure the following hardware for an Experion system:

- Printers
- Serial adapters
- Integrated keyboards (IKB)
 - Using an OEP/IKB adapter
 - Using a USB port

Related topics

“Installing a printer” on page 78

“Serial adapter installation checklist” on page 83

“Connecting an integrated keyboard (IKB) to an OEP/IKB adapter” on page 85

“Connecting an integrated keyboard (IKB) to a USB port” on page 86

Installing a printer

This topic describes how to install a printer.

Prerequisites

- A supported printer.
- You must be logged on to the computer using a Windows account with local administrator rights.
- If you are installing an alarm printer, such as an Epson LQ 1070+ ESC P2, the paper size is usually set to US Std Fanfold.

Tasks

Task	Go to	Done?
Connect the printer to the computer as specified by the manufacturer.		
Install the print driver. Choose one of the following methods:		
• Local printer	“Installing a printer driver for a local printer” on page 79	
• Local shared printer	“Installing a printer driver for a local shared printer” on page 79	
• Shared network printer with a suitable share name That is, the share name does not contain more than 30 characters and does not contain any spaces.	“Installing a printer driver for a shared network printer (with a suitable share name)” on page 80	
• Shared network printer whose existing share name is unsuitable	“Installing a printer driver for a shared network printer (whose existing share name is unsuitable)” on page 81	
Specify the location of the print job spool.	“Setting up the print job spool folder” on page 82	
If this is an alarm/report printer and it is connected to a computer other than the server, create a guest account.	“Creating a guest account” on page 82	
Configure the printer, as described in the <i>Server and Client Configuration Guide</i> .		

Related topics

- “Installing a printer driver for a local printer” on page 79
- “Installing a printer driver for a local shared printer” on page 79
- “Installing a printer driver for a shared network printer (with a suitable share name)” on page 80
- “Installing a printer driver for a shared network printer (whose existing share name is unsuitable)” on page 81
- “Setting up the print job spool folder” on page 82
- “Creating a guest account” on page 82

Installing a printer driver for a local printer

This procedure is only applicable if the printer is connected to the computer, and is only used by this computer.

To install the printer driver

- 1 Log on to the computer using a Windows account with local administrator rights.
- 2 Choose **Start > Devices and Printers > Add a Printer**.
- 3 Click **Add a Local Printer**.
- 4 Click the port to which the printer is connected. Click **Next** to continue.
- 5 Select the printer manufacturer from **Manufacturer**.
- 6 Select the printer model from **Printers**, and then click **Next**.
- 7 Name the printer. The name cannot contain spaces, and must not contain more than 30 characters.
- 8 Click **Next** to continue.
- 9 Specify whether or not the printer can be shared by other network users then click **Next**.
- 10 If you want to, specify **Location** and **Comments**.
- 11 Click **Next**.
- 12 Click **Yes** to print a test page.
- 13 Check the information is correct and click **Finish** to finish installing the printer.

Installing a printer driver for a local shared printer

This procedure is only applicable if the printer is connected to the computer, and it is shared by other computers.

To install the printer driver

- 1 Log on to the computer using a Windows account with local administrator rights.
- 2 Choose **Start > Devices and Printers > Add a Printer**.
- 3 Click **Add a Local Printer**.
- 4 Click the port to which the printer is connected. Click **Next** to continue.
- 5 Click the printer manufacturer from **Manufacturer**.
- 6 Click the printer model from **Printers**, and then click **Next**.
- 7 Name the printer. The name cannot contain spaces, and must not contain more than 30 characters.
- 8 Click **Next** to continue.
- 9 Click **Share as**, type the same name as above, then click **Next**.
- 10 If you want to, specify Location and Comments .
- 11 Click **Next**.
- 12 Click **Yes** to print a test page.
- 13 Check the information is correct and click **Finish** to finish installing the printer.

Installing a printer driver for a shared network printer (with a suitable share name)

This procedure is only applicable if the printer is connected directly to the network, and the current share name does not contain spaces or more than 30 characters.

To install the printer driver

- 1 Log on to the computer using a Windows account with local administrator rights.
- 2 Choose **Start > Devices and Printers > Add a Printer**.
- 3 Click **Add a network, wireless or Bluetooth printer**. A list of available printers displays.
If the printer you wish to connect to does not display, click **The printer that I want isn't listed** to browse a list of shared printers on the network.
- 4 Click the printer you want to add and click **Next**.
- 5 Specify whether or not you want the network printer to be the default and click **Next**.
Experion does not require the printer to be the default. However, if it is your only printer, and you wish to print screen dumps, you must make it the default printer.
- 6 Check the information is correct and click **Finish** to complete the installation.

To set the paper size

- 1 Choose **Start > Devices and Printers**.

- 2 Click the printer.
- 3 Right-click the printer and choose **Printing Preferences** from the menu which displays.
- 4 Click the correct paper size and click **OK**.
- 5 Select the orientation: **Portrait** or **Landscape**.
- 6 Click **Apply** and then click **OK** to close the **Printing Preferences** dialog box.

Installing a printer driver for a shared network printer (whose existing share name is unsuitable)

This procedure is only applicable if the printer's current share name contains spaces or more than 30 characters.

To install the printer driver

- 1 Log on to the computer using a Windows account with local administrator rights.
- 2 Choose **Start > Devices and Printers > Add a Printer**.
- 3 Do one of the following:

Option	Description
Windows 7, Windows Server 2008, Windows Server 2008 R2	<ol style="list-style-type: none"> 1. Click Add a printer. 2. Click Add a local or network printer as an administrator. 3. Click Add Local Printer.

- 4 Click **Create a new port** and click **Next**.
- 5 Type the full network UNC path for the printer in the **Port Name** dialog box and click **OK**.
- 6 Click the printer manufacturer from **Manufacturer**.
- 7 Click the printer model from **Printers**, and then click **Next**.
- 8 Name the printer. The name cannot contain spaces, and must not contain more than 30 characters.
- 9 Click **Next**.
- 10 Click **Do not share this printer** and click **Next**.
- 11 If you want to, specify Location and Comments.
- 12 Click **Next**.
- 13 Click **Yes** to print a test page.
- 14 Check the information is correct and click **Finish** to finish installing the printer.

To set the paper size

- 1 Choose **Start > Devices and Printers**.
- 2 Select the printer.
- 3 Right-click the printer and select **Printing Preferences**.
- 4 Click **Advanced**.
- 5 Click the correct paper size and click **OK**.
- 6 Select the orientation: **Portrait** or **Landscape**.
- 7 Click **Apply** and then click **OK** to close the **Printing Preferences** dialog box.

Setting up the print job spool folder

When you install a printer, Windows creates a folder to temporarily store print jobs before sending them to the printer. By default, the folder is *%windir%\system32\spool\Printers*.

To change the spool folder

- 1 Choose **Start > Devices and Printers > Printers** to display the Printers window.
- 2 Select a printer and click **Print server properties** and click the Advanced tab.
- 3 Type a path for the print spool folder that is not in the primary partition.
- 4 Click **Apply** and then click **OK** to save your changes.

Creating a guest account

When printing alarms, events, or reports on a printer that is connected to a computer other than the server, network security becomes a factor. This is because Experion runs under the *Mngr* account. When Experion attempts to print via another computer, it logs into that computer using the *Mngr* account and associated password. The print job will fail if the logon fails.

To ensure that security does not become an issue when printing, you must create a 'guest' account on the other computer named *Mngr*. If this account is only used for printing, you can set it up for only printing privileges.

Serial adapter installation checklist

This section describes the prerequisites while installing a serial adapter.

Prerequisites

- Serial adapter is qualified for use with Experion R410.
- When installing a Windows operating system recommended serial adapter, the device will be detected and automatically configured during the Windows operating system installation.

Related topics

“Installing a Stallion EasyConnection” on page 83

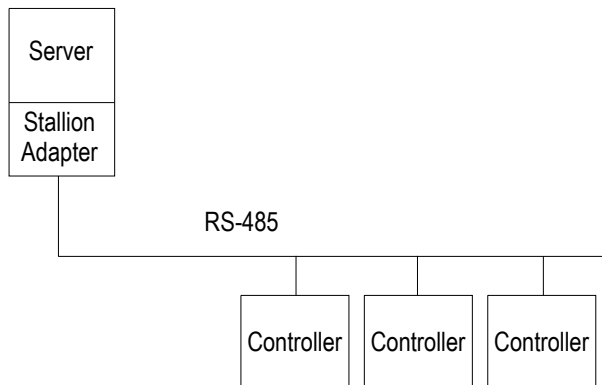
Installing a Stallion EasyConnection



Electrostatic discharge

Ensure that you are properly earthed when installing any hardware in a computer. Honeywell recommends that you use an antistatic wrist strap. Alternatively, frequently touch metal parts on the computer to prevent the buildup of static electricity.

The Stallion EasyConnection serial adapter can connect RS-232, RS-422, and RS-485 devices. The following figure shows a typical configuration.



Prerequisites

- Stallion EasyConnection adapter.
- Disk or CD supplied with the adapter.

- For details about connecting controllers to the adapter, see the *Server and Client Configuration Guide*.

To install a Stallion EasyConnection and configure its driver

- 1 Install the adapter in accordance with the manufacturer's instructions, using the default DIP switch settings.
- 2 Do one of the following:

Option	Description
Windows Server 2008	<ul style="list-style-type: none"> • In the Windows Control Panel classic view, double-click Add Hardware. The Add Hardware Wizard is displayed.
Windows 7	<ol style="list-style-type: none"> 1. In the Windows Control Panel large or small icon view, click Devices and Printers. 2. Click Add a Device. The Add a device wizard is displayed.

- 3 Follow the prompts on the wizard to install the driver.

Connecting an integrated keyboard (IKB) to an OEP/IKB adapter

This section shows how to connect the Honeywell OEP/IKB adapter to a computer and a non-USB integrated keyboard (IKB).

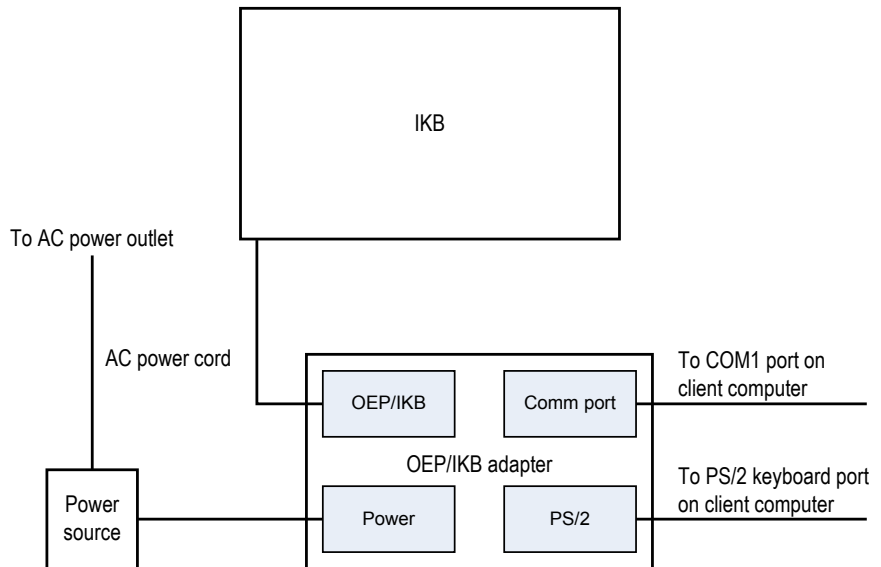


CAUTION

Do not connect the AC power cord to the AC power outlet unless the OEP/IKB adapter is connected to the IKB and the COM1 and PS/2 ports of the computer.

To connect an IKB to an OEP/IKB adapter

- 1 Shutdown and turn off the computer.
- 2 Turn off the IKB.
- 3 Connect the OEP/IKB, COMM, and PS/2 ports on the OEP/IKB adapter as shown in the following diagram.



- 4 Connect the power source to the OEP/IKB adapter.
- 5 Connect the AC power cord to the power source and the AC power outlet.
- 6 Turn on the computer and the IKB.

Connecting an integrated keyboard (IKB) to a USB port

This section describes how to connect a USB integrated keyboard (IKB) to a USB port or USB hub connected to the computer.

Prerequisites

- The IKB service is installed.
- You know the location of the USB drivers on your computer. If you accepted the default path when you installed the IKB service, the location of the USB drivers is

C:\Program Files (x86)\Honeywell\IKB_USB_Drivers

To connect the Integrated Keyboard and install USB drivers

- 1 Insert the integrated keyboard (IKB) USB cable into a USB port on the computer or the USB hub that is connected to the computer.
- 2 Insert the IKB power plug into a power outlet.
- 3 Ensure the power to the IKB is switched on.
- 4 The Found New Hardware wizard starts. Click **Next** to continue.
- 5 Click **Specify a location** and then click **Next**.
- 6 Type the **location of the USB drivers** and then click **OK**.
- 7 The Found New Hardware wizard restarts.
- 8 Click **Next** to continue.
- 9 Click **Specify a location** and then click **Next**.
The location you typed in the step above appears.
- 10 Click **OK** to continue.
- 11 Click **Next**.
- 12 Click **Finish**.
- 13 Restart the computer.

To configure the USB Serial port

- 1 Click **Start**, right-click **Computer** and choose **Manage**.
- 2 Click the **Device Manager** item to display a list of devices.
- 3 Expand the **Ports (COM & LPT)** item.
In the list of ports is the USB Serial item with the port name displayed next to the item name. The port name must be COM3.

- 4 If the port name is *not* COM3
 - a Right-click on the **USB Serial** item and choose **Properties**.
 - b Click the **Port Settings** tab.
 - c Click **Advanced**.
 - d In the **COM Port Number** list, choose **COM3**.
 - e Click **OK** to close the **Advanced Settings** dialog box.
 - f Click **OK** to close the **USB Serial Properties** dialog box.
- 5 Close the **Computer Management** dialog box.

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How to report a security vulnerability

For the purpose of submission, a security vulnerability is defined as a software defect or weakness that can be exploited to reduce the operational or security capabilities of the software.

Honeywell investigates all reports of security vulnerabilities affecting Honeywell products and services.

To report a potential security vulnerability against any Honeywell product, please follow the instructions at:

<https://honeywell.com/pages/vulnerabilityreporting.aspx>

Submit the requested information to Honeywell using one of the following methods:

- Send an email to security@honeywell.com.
- or
- Contact your local Honeywell Technical Assistance Center (TAC) or support center listed in the “Support and other contacts” section of this document.

Index

A

- accounts
 - passwords, changing 10
 - resetting log on accounts for DCOM Servers and services 11
- assigning a drive letter to a shared folder 49

C

- changing
 - account passwords 10
 - archive folders 53
 - computer names 7
 - Console Extension Station computer name 9
 - Console Station computer name 9
 - displays search path 53
 - Experion account passwords 10
 - Flex Station computer name 9
 - font for reports 54
 - history folders 53
 - license details 51, 52
 - passwords 10
 - report font 54
 - report paper type 54
 - restore folders 53
 - search path for displays 53
 - security settings on server 17
 - server configuration details 51
- checklists
 - changing a computer name 9
 - configuring a Systech terminal server 63
 - installing a remote third-party OPC client 20
 - installing a remote third-party OPC server 22
 - Microsoft Excel

- reports 35
 - setting up a file server 47
 - clients
 - OPC client
 - setting up a third-party OPC client 19
 - commands and utilities
 - ssservices.exe 61
 - common Experion tasks 57
 - Computer Management services console 61
 - computer names 7–9
 - configuring
 - DCOM 27–29
 - OPC 20, 22, 27, 31
 - Systech terminal server 63
 - Console Extension Stations
 - changing the name of 9
 - Console Stations
 - changing the name of 9
 - consoles
 - Computer Management services console 61
 - control panel, services 60
 - creating
 - mngr account 25
 - third-party OPC Windows account 26
 - user accounts 25
 - Windows mngr account 25
- ## D
- databases
 - configuring items 55
 - history retention 55
 - sizing 55
 - DCOM
 - configuring 27–29
 - resetting 11
 - displays

- changing search paths 53
- search paths 53
- drive letter, assigning 49

F

- file server
 - setting up 47
- Flex Stations
 - changing the name of 9
- folders
 - shared folders 48, 49

H

- history
 - archive folders 53
 - restore folders 53
 - retention 55
 - specifying retention period 55
- HMIWeb Display Builder
 - installing 15

I

- IKB (Integrated Operator Keyboard) 77
- installing
 - HMIWeb Display Builder 15
 - Microsoft Excel 36
 - Microsoft service packs 37
 - ODBC driver 44
 - OPC Server Connect package 24
 - remote third-party OPC client 20
 - remote third-party OPC server 22
 - specialized hardware 77

L

- license
 - changing 51, 52

M

- Microsoft Excel
 - Data Exchange
 - setting up 39

- installing 36
- installing service packs 37
- Microsoft Excel for Data Exchange (MED E) 39
 - reports
 - setting up 35, 39, 42, 45
- Microsoft Office
 - installing service packs 37
- mngr account (Windows)
 - creating 25

N

- naming conventions
 - computer names 7, 8
- networks
 - printers 45

O

- ODBC driver
 - installing 44
- OEP (Operator Entry Panel) 77
- OPC
 - callback 28
 - configuring 20, 22, 31
 - configuring DCOM 27–29
 - DCOM 27–29
 - OPC Client
 - setting up a third-party OPC client 19
 - OPC Server
 - OPC Server Connect package 24
 - setting up a third-party OPC server 19
 - read/write permissions 32
 - Server
 - OPC Server Connect package 24
 - setting up a third-party OPC client or server 19
 - third-party OPC client or server, setting up 19
 - third-party OPC server, configuring 29
 - third-party OPC Windows account 26

P

- passwords

- changing
 - Experion account passwords 10
- POK (Parallel Operation Keyboard) 77
- printers
 - configuring 45
 - installing 77

R

- read/write permissions
 - OPC 32
- reports
 - batch 42
 - font 54
 - Microsoft Excel 39, 42
 - network printers 45
 - paper type 54
 - printers 45
- resetting
 - log on accounts for DCOM Servers and services 11
- retention periods for collecting history 55

S

- searching for
 - display search paths 53
- security
 - server
 - settings 17
- serial adapters
 - installing 77
- servers
 - computer names 8
 - configuring 51
 - naming rules 8
 - OPC server
 - setting up a third-party OPC server 19

- starting 58
- stopping 58
- service packs (Microsoft Excel, Microsoft Office), installing 37
- services
 - Computer Management services console 61
 - control panel 60
 - DCOM 11
 - OPC server service 31
 - starting 61
 - stopping 60, 61
- shared folders 48, 49
- sizing non-licensed items 55
- specialized hardware, installing 77
- ssservices.exe command 61
- starting
 - server 58
 - services with the ssservices.exe command 61
- stopping
 - server 58
 - services 60, 61
- Systech terminal server 63

T

- tasks
 - common Experion tasks 57
- terminal servers
 - Systech terminal server 63
- third-party OPC client or server 19

W

- Windows
 - account for third-party OPC 26
 - mngt account 25

