T101 - Migrating your HMI System
Agenda

Why Migrate to Integrated Architecture

How to Migrate

What’s New in HMI Software

RSView32 to FactoryTalk View SE migrations

FactoryTalk View SE / ME 64-bit database conversion

Competitive software conversions
RA Product Lifecycle Stages

Active
- The most current product offering within a category of product.

Active Mature
- Products fully supported and available, but a newer family within the product category is available. Can realize benefits from migrating to newer family.

End of Life
- A product discontinued date has been announced. Actively execute migrations and/or last time buys.

Discontinued
- New product is no longer available. Repair/exchange services may still be available.
Product Lifecycle

- Active
- Active Mature
- End of Life
- Discontinued

- PanelView Plus 7
- PanelView Plus 6
- PanelView Standard

NEW
Product Lifecycle Status

Search Results

<table>
<thead>
<tr>
<th>PRODUCT ID</th>
<th>PRODUCT DESCRIPTION</th>
<th>LIFECYCLE STATUS</th>
<th>DISCONTINUED DATE</th>
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<tr>
<td>1785-L40B</td>
<td>PLC-5 PROCESSOR</td>
<td>DISCONTINUED</td>
<td>12/31/2014</td>
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Lifecycle Status Key

- **Active**: Most current offering within a product category.
- **Active Mature**: Product is fully supported, but a newer product exists. Gain value by migrating.
- **End of Life**: Product is fully supported; actively execute migrations and last time buys.
- **Discontinued**: New product no longer manufactured/procured; repair/exchange services may be available.

* In some instances, certain product IDs may not appear in the lifecycle database. If you are looking for lifecycle information on a specific catalog number that does not appear in these Search Results, please contact Customer Care for assistance.

www.rockwellautomation.com/legacy
Migrate to Integrated Architecture
Value of Integrated Architecture

- Reduce Development Time with FactoryTalk View software
  - Global Objects and Faceplates
  - Seamless Logix Connectivity
    - Direct tag browsing
  - Macros and Recipe Management

- Increase Productivity
  - Trending and Datalogging
  - PDF Viewer, MS Office Viewers
  - Email
  - Web browser
  - Backup/Restore

- Keep connected with your Plant Floor
  - FactoryTalk ViewPoint
  - VNC
  - FTP
Productivity Tools

- Tools to get the job done efficiently!

- PDF Reader
- Media Player
- Email
- Datalog
- Web Browser

- Office Viewers
- Backup / Restore
Mobility Tools

- FactoryTalk ViewPoint
- VNC (Virtual Network Computing)
- FTP (File Transfer Protocol)
PanelView Plus 7

More Screen Options ..... Greater Resolutions ..... Additional Certifications ..... 

- New Displays
  - Increased screen resolution
  - Wide screen options
  - Additional sizes – from 4” to 19”

- Certifications:
  - ATEX
  - INMetro, EAC – Release 2
  - Marine (Future Performance models)
  - IP66, IP54, NEMA 12, NEMA 13 and NEMA 4X
PanelView Plus 7 Standard version includes an embedded Ethernet Port.

PanelView Plus 7 Performance line comes with an embedded switch (DLR).
FactoryTalk View ME v8.0 Updates

Design-time security
- Each project has its own private security configuration
- Restore a project (MER/APA) without overwriting any other project’s security configuration

Updated Domain authentication
- Allows panel to authenticate with Server 2008/2012 domains
- Requires LDAP support to be enabled in end-user’s domain

Runtime user management
- Add and delete FactoryTalk users during runtime
- Change user’s group membership during runtime

Compatibility
- Windows 8 and Windows Server 2012 Support
- PanelView 7 Support

Release information subject to change
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Competitive software conversions
1. Open your PanelView Standard application in FactoryTalk View Studio.
2. Save it as a PanelView Plus compatible application.

80% of the time, no further modification is required.

Conversion log in FTView Studio identifies any features not supported by PanelView Plus 6 and 7.

Typically may want to take advantage of the enhanced features and graphics available in PanelView Plus 6 and 7.
This document will provide guidelines and procedures for migrating a PanelView Standard terminal and applications to the PanelView Plus terminal platform.
Prosoft Ethernet/IP to Remote I/O and DH+

- ProSoft Part Number: AN-X-AB-DHRIO
- EtherNet/IP HMI Adapter to Remote I/O and DH+
- Upgrade your HMIs without replacing your Control System

From - - >

PanelView Standard

PLC 5

PanelView Plus 6

To - - >

EtherNet/IP to AB Remote I/O

Blue Hose

AB Remote I/O

PLC 5
# PanelView Migration Information

## Migration Tools

<table>
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<th>Migration Tools</th>
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<td>On-Site Conversion &amp; Migration Services</td>
<td><a href="http://www.rockwellautomation.com/services/onsite">http://www.rockwellautomation.com/services/onsite</a></td>
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<tr>
<td>StepForward Incentives Program</td>
<td><a href="http://www.ab.com/stepforward/">http://www.ab.com/stepforward/</a></td>
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## Frequently Asked Questions

- **Is there a list of questions and answers related to migration solutions?**
  - Yes, the document provides a list of frequently asked questions related to migration solutions.

## Migration Links

- **Migration Tools**
  - [Migration Solutions - Lifecycle Extension & Migrations](http://www.rockwellautomation.com/solutions-services/capabilities/migration-solutions/overview.page)
  - [On-Site Conversion & Migration Services](http://www.rockwellautomation.com/services/onsite)
  - [StepForward Incentives Program](http://www.ab.com/stepforward/)
  - [ProSoft Ethernet/IP to Remote I/O or DH+](http://www.prosoft-technology.com/prosoft/products/stand_alone_gateways/ethernet/ethernet_ip/an_x_ab_dhrio#)

## Conversion Services

- **Conversion Services**
  - [Conversion Services for Your Legacy Creator Interface Platform](http://www.rockwellautomation.com/products/software/creator/creator_interface/)
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- Competitive software conversions
A View for Every Manufacturing Scenario

FactoryTalk View Machine Edition
- Panel HMI
  - PanelView Plus and Compact

FactoryTalk View Site Edition
- Scalable PC Based HMI
  - Industrial and Non-Industrial Computers and Monitors

FactoryTalk ViewPoint
- Web-Based HMI
Summary of FT View v8.0 release

- Products and Services Released:
  - FactoryTalk View Site Edition 8.0
  - FactoryTalk View Machine Edition 8.0
  - FactoryTalk ViewPoint 8.0
  - FactoryTalk Services Platform 2.70
  - FactoryTalk Alarms and Events 2.70
  - RSLinx Enterprise 5.70
  - RSLinx Classic 3.70
  - FactoryTalk Activation 3.62.01
# FactoryTalk View SE v8.0
## August 2014 Release

### Streamlined Installation
- Unattended Install
- Streamlined Client Install
- Uninstall FactoryTalk View Tool
- FT Historian Connectivity Tools

### Improved Run-Time Experience
- Confirmation Popup*
- Button Enable Disable*
- Improved display of screen values
- Enhanced surface area for touch animation*
- New User Group Security functions

### Alarming Improvements
- Alarm Severity Improvements
- Configure Alarm Sounds for Banner
- Out of Scope alarm occurrence handling
- Alarm Banner Sort Order improvements
- Alarm Log Viewer Improvements

### Configuration and Application Building
- Capture Value before Change
- Remote Studio for Network Station
- VBA import and export

### Expanded Operating System Support
- Windows 8
- Windows 8.1 Update
- Windows 2012 Server R2
- Cache Management Tool
- Last release supporting Older Microsoft Operating Systems

* - Supported in ViewPoint 8.0
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Product Lifecycle

- **Active**
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*FactoryTalk® View ME*
*FactoryTalk® View SE*
*RSView32™*

Expand Your View
Changing Technology

- Platform evolution - operating system and PC
  - Windows XP – MS support ended **April 8, 2014**
    - No software updates
    - No security updates for virus protection!
    - No new driver support
    - FT View v8.0 is final release to support Windows XP
  - 64-bit platform and operating systems becoming standard

- Data sharing with the Integrated Architecture and FactoryTalk
  - Distinction between HMI and other systems starting to blur
  - Better integration with controllers
  - Integrate with FT Historian, FT AssetCentre, VantagePoint and ViewPoint

- Adoption of commercial advancements in technology
  - Virtualization can save capital expense in server infrastructure and administration costs
  - Increased demand for mobile HMI solutions
  - Modern HMI environment for new personnel entering the workforce
What is the status of RSView32?

- Do I have to migrate - is RSView32 going away?
  - No - RSView32 will be supported as long as 32-bit systems are available
  - RSView32 v7.60 does provide support for Windows 7 32-bit
  - However, there are no plans for RSView32 to support 64-bit operating systems
  - If moving to 64-bit systems, you will need to either migrate to FactoryTalk View SE or employ a solution such as virtualization

- Many RSView32 systems are deployed on computers with Windows XP – IT departments may have notified the plant to develop a migration plan
Benefits of migrating to FactoryTalk View SE

- Application development tools
- Redundancy
- FactoryTalk Live Data and Direct Referencing
- FactoryTalk Services Platform
- Audit trails and e-signature for regulatory compliance
- FactoryTalk ViewPoint
- Client-side VBA (client-stored and executed)
- Information product integration with FactoryTalk VantagePoint, Historian ME
About FactoryTalk View Studio

- FactoryTalk View Studio is the single development environment for both FactoryTalk View SE and ME
  - Is also the tool used to migrate RSView32 applications to FactoryTalk View SE
- Four types of applications can be created in FactoryTalk View Studio
  - **Network Distributed (SE)** - multi-client, multi-server application with components running on different machines
  - **Network Station (SE)** – single-client application with all components running on one machine, but with the ability to connect to system components on remote machines
  - **Local Station (SE)** – single-client application with all components running on a single machine
  - **FactoryTalk View Machine Edition (ME)** – application that runs on either a PanelView Plus terminal or on a PC running FactoryTalk View ME Station
How to migrate an RSView32 application to FactoryTalk View SE

Create a FactoryTalk View SE project

- Select the type of application you want to create: Site Edition (network distributed or network station) or Site Edition (local) and give it a name.
How to migrate an RSView32 application to FactoryTalk View SE

Add a new Area, and then create a new HMI Server in it

- Right-click on the application and select **Add New Server > HMI Server**

- In the HMI Server Wizard, select **Import a project** and click **Next**

- Browse to the RSView32 project that you are importing
How to migrate an RSView32 application to FactoryTalk View SE

- Provide a name for the new HMI Server and select the computer that will host the HMI server; click **Finish** to import the RSView32 application.

- The RSView32 project is imported into FactoryTalk View SE.
  - You will see displays and the tag database in the project as well as:
    - Animations
    - Text
    - Alarms
    - Expressions
    - Libraries
    - Images
    - Macros
    - Global Keys
    - Parameter Files
    - Recipes
    - Derived Tags
    - Events
How to migrate an RSView32 application to FactoryTalk View SE

- Finishing steps
  - Create a **data server** to communicate with the controller – see **AID 29663**
  - Convert or configure alarms – HMI tag alarms can be converted to FactoryTalk Alarms; controller-based alarms are available for use in View SE through FactoryTalk Alarms and Events
  - Configure startup components and create client files
  - Convert graphics to use direct referencing
  - Migrate functionality created with RSView32 VBA – see **AID 51770**
  - Create Users and configure Security
  - Migrate RSView32 extension functionality
- Be aware of best practices in FactoryTalk View SE
  - **AID 37110** has links to many best practice documents, as well as patches and application notes
Utilities and tools available for migration

- **Alarm Migration tool**
  - Used to convert HMI alarms to FactoryTalk Alarms
  - Converts alarm tags to a format usable by the FT Alarms and Events server
  - Available in Knowledge Base AID 45583

- **Tag Import and Export wizard**
  - Built into FactoryTalk View Studio
  - Used to export HMI tag information to a .CSV file, which can then be:
    - Imported into a FactoryTalk Alarms and Events server
    - Edited using Excel, then re-imported into an application
Utilities and tools available for migration

- **Legacy Tag Database Conversion utility**
  - Installed with FactoryTalk View v6.1, 7.0, or 8.0
  - Also available in Knowledge Base AID **450509**
  - Converts tag database from old (Watcom) format to new (SQL Server Express) format that supports 64-bit systems
  - Allows you to import RSView32 project into FactoryTalk View on 64-bit machine

- **HMI Tag to Direct Reference Converter Wizard**
  - Converts HMI tag database references in graphic objects to direct controller references
  - Available in Knowledge Base AID **31289**
  - Can be used with both View SE and View ME
Helpful links

- **RSView32 to FactoryTalk View SE Migration Guide** – Lit Library Doc ID: FTALK-QR004A-EN-P
  - Covers details on what does and does not convert, importing RSView32 app into FT View SE
- **Knowledge Base articles**
  - **27708** - RSView32 to View SE Conversion Guidelines
  - **46786** – How to convert an RSView project to FactoryTalk View SE Distributed
  - **51770** – Sample app showing VBA migration
  - **70818** – FactoryTalk Alarms and Events with Win-911
  - **57990** – FactoryTalk ViewPoint tips and best practices
  - **40891** – FactoryTalk View SE Server Redundancy Guidelines
Helpful links

- RSView32 to FT View SE migration site
  - [http://campaign.rockwellautomation.com/hmi-home](http://campaign.rockwellautomation.com/hmi-home)

- Collection of tools to help with decisions and process of migrating

- Many new videos there covering why you should think about migrating, technical tips and a demo of migrating an app, and success stories
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Moving to a 64-bit system

- Be aware that a 64-bit OS requires FT View SE v6.1 or later
  - RSView32 does NOT support 64-bit operating systems
  - Neither do pre-v6.1 versions of FT View SE / ME
- In v6.1 of FactoryTalk View, database format changed to support 64-bit
  - Now based on SQL Server
- Older projects need the tag DB converted before use on 64-bit OS
- Couple ways to do this:
  - Open older View SE project in v6.1 or later - automatically converts DB
  - Use the Legacy Tag Database Conversion Tool to convert tag DB
Converting a pre-v6.1 FT View project

32-bit machine with pre-v6.1 FT View

- Install Legacy Tag DB Converter and run it
- Select project to be converted and export Legacy Tag Database
- .CSV files will be created in project folder
- Copy entire folder over to 64-bit machine
- Can use Application Manager to create archive .APA for ME project

64-bit machine with v6.1 or later FT View

- For ME .APA, first run Application Manager to restore project
- Run Legacy Tag DB Converter (installed with FT View v6.1+)
- Select FT View SE/ME application type and browse to project folder
- Tag DB is converted…can now open application in FT View v6.1 or later!
Converting an RSView32 project

32-bit machine with RSView32

- Install Legacy Tag DB Converter and run it
- Select RSView32 project to be converted and export Legacy Tag Database
- .CSV files will be created in RSView32 project folder
- Copy entire folder over to 64-bit machine, including .CSV files

64-bit machine with V6.1 or later FT View SE

- Run Legacy Tag DB Converter (installed with FT View v6.1 or later)
- Create FT View tag DB in new format
- Select RSView32 application type and browse to project folder
- Tag DB is converted…can now import RSView32 project into FT View SE v6.1 or later!
Legacy Tag Database Conversion - Summary

- Users who **do not plan** to use FactoryTalk View on a 64-bit OS **do not need** to use the utility!
  - Opening a pre-v6.1 project in FactoryTalk View v6.1 or 7.0 on a 32-bit OS will automatically convert the tag database to SQL Server 2008 R2 Express
  - Importing an RSView32 project into FactoryTalk View v6.1 or 7.0 (32-bit) will also automatically convert the tag database
- Users who are planning to use pre-v6.1 FactoryTalk View projects on a 64-bit OS are **required** to use the utility
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Competitive application conversions

- StepForward applies for any competitor HMI software migration
  - Trade-in one for one license toward FactoryTalk View SE
- Competitive Application Conversion Utilities
  - For Wonderware InTouch and Intellution iFIX/FIX32
  - Not a complete conversion!
  - Tag DB and displays convert, scripts and ActiveX do not
  - Helps get conversion started
  - For details talk to your distributor or RA sales
Thank you!