

AMS Suite: Intelligent Device Manager

Quick Install Guide



1 YOUR AMS DEVICE MANAGER PACKAGE INCLUDES THE FOLLOWING:

- A AMS Device Manager License Flyer
- B Introduction Letter
- C Installation Guide
- D Quick Install Guide
- E DVD



Please contact your local AMS Device Manager Service Office or Service Representative if any items are missing.

** All AMS Device Manager documentation is available online. See step 7 for details.

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YOUR COMPUTER HARDWARE

Your computer hardware should meet the **recommended** hardware and operating system requirements for optimal installation and performance. See the following pages for specific requirements. For additional information, please refer to the Installation Guide.

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CONFIGURATION

In order to communicate with intelligent devices, you need to configure a communication method in the AMS Device Manager Network Configuration. To do this, select: **Start→All Programs→AMS Device Manager→Network Configuration**. See the Installation Guide for more detailed information.

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STARTING AMS DEVICE MANAGER

Now that you have installed, licensed and set up communication systems, you are ready to run AMS Device Manager. Select **Start→All Programs→AMS Device Manager→AMS Device Manager**. Type in a username and password and then click **OK**. You can login initially as “admin” without a password. See the installation details for instructions on setting up usernames and passwords. Congratulations! You are now running AMS Device Manager!

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INSTALLATION— YOU'RE READY TO BEGIN!

The steps you perform to install AMS Device Manager are determined by the type of system you want to set up. The basic steps to install a standalone AMS Device Manager system in either a single-station (Server Plus) or a distributed (Server Plus and Client SC Stations) configuration are covered in this guide. Additional information is contained in the Installation Guide.

For guidance installing AMS Device Manager on a DeltaV or Ovation workstation, refer to the AMS Device Manager Installation Guide.

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REGISTRATION & LICENSING



Follow the AMS Device Manager Licensing Wizard to gather the information needed to obtain your software licensing codes. Your customer access code is included in the software package. Please be sure to retain this code for future reference.

You must license your AMS Device Manager system before you can use it. See the installation checklists on the following pages for details. Use the web to license AMS Device Manager quickly and easily 24 hours a day!

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IN CASE YOU NEED HELP...

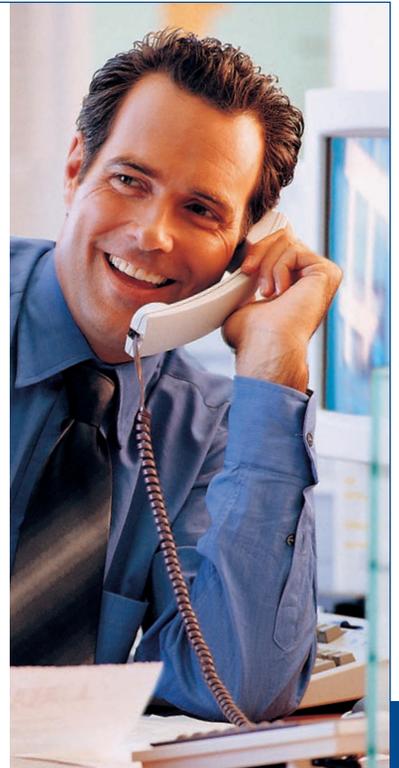
There are a number of places you can get assistance:

- A Books Online** Select **Start**→**All Programs**→**AMS Device Manager**→**Help**→**Books Online**.
- B Guardian Support** Our Guardian Support program provides you with direct, comprehensive

support, and delivers key ongoing benefits:

- A Guardian account for customized content based on individual system components
- Receipt of new versions of AMS Device Manager software sent directly to you
- Automatically receive and install new device files on your system, so you are always up to date
- Direct telephone and email support for expert advice and guidance
- Online technical support, including a knowledge base of information, available anywhere in the world

Visit www.assetweb.com/support for more information on Guardian Support!





SERVICES OFFERING

Get off to a strong start with your technology investment. Use Emerson's Asset Optimization Services to ensure you are effectively employing AMS Device Manager. Emerson experts can help you use the diagnostics from your smart devices to full advantage.

Our experts will install the application and complete your initial configurations and implement maintenance tasks to optimize your use of AMS Device Manager to enable measurement of improvement to your facility's bottom line.



NEED TRAINING?

An organization's most valuable asset is its people. A well-trained staff brings direct benefits that can be calculated as a return-on-investment and is essential to staying competitive in today's markets.

The fastest way for your team to learn how to productively use AMS Device Manager software is through our self-paced training programs or our comprehensive instructor-led training. Our training is based on real-world tasks that AMS Device Manager users encounter on the job. It's quick, can be completed at your facility, and delivers the results you expect.

Contact your Emerson Process Management Representative or visit www.emersonprocess.com/education for more details.

AMS DEVICE MANAGER VERSION 12 REQUIREMENTS

AMS Device Manager Hardware and Operating System Requirements

AMS Device Manager Station Type	Minimum Requirements	Operating Systems
Server Plus Station	Intel Core 2 Quad, 2 GHz 3 GB memory 2 GB free hard disk space	Windows XP, Professional SP3 ¹ Windows Server 2003, Standard SP2 ¹ Windows Server 2003 R2, Standard SP2 ¹
Client SC Station	Intel Core 2 Duo, 2.4 GHz 2 GB memory 2 GB free hard disk space	Windows 7, Professional SP1 ² , Enterprise SP1 ² Windows Server 2008, Standard SP2 ² , Enterprise SP2 ² Windows Server 2008 R2, Standard ³ , Enterprise ³

¹ Only 32-bit versions are supported.

² 32-bit and 64-bit versions are supported.

³ Only 64-bit versions are supported.

NOTE: PCs in a distributed system must use operating systems from the same OS family. You may mix PCs using Windows XP and Server 2003 or PCs using Windows 7 and Server 2008. No other combinations are allowed.

Set virtual memory to 2-3 times the size of the physical memory.

The minimum PC requirements are applicable to AMS Device Manager stations in a standalone deployment. More rigorous PC requirements may exist if the PC will also function as a DCS workstation. Please refer to the DCS documentation for more details.

USB Interfaces

- A 375 Field Communicator requires a USB Infrared Data Association (IrDA) adapter and IrDA driver. This driver can also be used to communicate with the 475 Field Communicator. See the AMS Device Manager Release Notes for a list of supported adapters.
- The 475 Field Communicator with Bluetooth requires a supported Bluetooth adapter. See the Release Notes for a list of supported adapters and system requirements.
- A USB port and USB HART modem driver are required to use a USB HART modem. See the Release Notes for a list of supported modems.
- A USB port and the Fieldbus Device Configuration Utility are required to use the USB Fieldbus Interface. See the USB Fieldbus Interface User's Manual for system requirements.

Monitor Requirements

- The minimum monitor requirements are 1024 x 600 resolution and 16-bit color.

Serial Interfaces

- A standard RS-232 serial interface is required for a serial HART modem, HART multiplexer network, or documenting calibrator.
- A serial HART modem requires a serial port with a dedicated interrupt.
- AMS Device Manager operation has been verified for a serial HART modem connected to the built-in serial port of a PC or to a Sealevel COM8 port board (installed on an ISA bus of the AMS Device Manager PC).

Before You Use AMS Device Manager



- Set up and configure communication interfaces, and attach smart devices. See the Installation Guide for more information.
- Review the "Installation and upgrading issues" in the Release Notes and follow any steps appropriate for your system.

AMS DEVICE MANAGER INSTALLATION SINGLE STATION

Note: Refer to the *AMS Suite: Intelligent Device Manager Installation Guide* for more detailed information on all installation steps.

Before You Begin



Verify your software and hardware meet requirements. See page 1 of this insert.

If you are installing AMS Device Manager on a laptop that you connect to a network through a docking station, *dock it during AMS Device Manager installation.*

If your AMS Device Manager station is connected to a computer network, see your system administrator for networking protocol requirements.

Install AMS Device Manager

You will need your customer access code printed on your AMS Device Manager software certificate to gather registration information during AMS Device Manager installation.

NOTE: Do not interrupt the installation process except when prompted to reboot the machine, or AMS Device Manager will not be fully installed and will malfunction. Do not remove the installation disk when you reboot the PC.



The Microsoft Windows Server and Workstation services must be running on the PC during installation.

Insert **DVD** in the DVD-ROM drive. If the installation does not start automatically, select **Start→Run** from the Windows taskbar and in the text box, type D:\AMSDeviceManager_SETUP.EXE (where D: is the DVD-ROM drive letter) and click **OK**.

Click **Server Plus Station** and follow the prompts.

License AMS Device Manager

After receiving your license codes from the AMS Device Manager Registration Center, rerun the Licensing Wizard to complete the licensing process and enable the AMS Device Manager software.



From the Windows Start menu, choose **Start→All Programs→AMS Device Manager→Licensing→Licensing Wizard**.

Follow the prompts in the Licensing Wizard.

Install AMS Device Manager SNAP-ON™ Application(s)

AMS Device Manager SNAP-ON application capabilities are separately licensed; you should only install a SNAP-ON application if you have licensed it.



Check the SNAP-ON application's documentation for any additional hardware and software requirements.

The Microsoft Windows Server and Workstation services must be running on the PC during installation.

Insert **DVD** in the DVD-ROM drive and select **Start→Run** from the Windows taskbar.

In the text box, type D:\SNAP-ONS And Tools\SNAP-ONS\<FolderName>\SETUP.EXE (where D: is the DVD-ROM drive letter and <FolderName> is the name of the folder for the SNAP-ON application) and click **OK**.

Follow the prompts.

Install SNAP-ON Application(s) continued

Repeat for each licensed SNAP-ON application.

Note: The Calibration Assistant SNAP-ON application is enabled through licensing — no separate installation is required.

Set Up AMS Device Manager User Logins

Add a Password to the AMS Device Manager Admin Login

Set up a password for the “admin” username as soon as AMS Device Manager is installed to ensure system security.



Select **Start**→**All Programs**→**AMS Device Manager**→**User Manager**.

In the AMS Device Manager User Manager Login dialog box, enter **Admin**, and click **Login** (no password is required initially).

In the AMS Device Manager User Manager window, select the admin username and click **Edit User**.

Enter a password and confirm it.

Ensure all special permissions are checked.

Click **OK**.

Add Other AMS Device Manager User Logins



For a Standard User (see below for a Windows User):

In the AMS Device Manager User Manager window (see above), click **Add User**.

Select the Standard User option and click **Next**.

Enter a username and password and confirm the password.

Select the appropriate permissions for this user. See Books Online for more information.

Click **Finish** to add the new username to the list of users.

Repeat for each additional Standard User.

Click **Close**.

For a Windows User:

Add the Windows Username to the AMSDeviceManager group (see your network administrator).

In the AMS Device Manager User Manager window (see above), click **Add User**.

Select the Windows User option and click **Next**.

Select the username from the list of users and click **Next**.

Select the appropriate permissions for this user. See Books Online for more information.

Click **Finish** to add the new username to the list of users.

Repeat for each additional Windows User.

Click **Close**.

AMS DEVICE MANAGER INSTALLATION DISTRIBUTED SYSTEM

Before You Begin



Verify your software and hardware meet requirements. See page 1 of this insert.

Ensure each PC uses the same software application (such as Word or Excel) and version for entering service notes.

Establish suitable Windows user profiles or unique Windows usernames and passwords for AMS Device Manager users. All stations must use the same network domain. If a domain is not used, each unique Windows username and password for AMS Device Manager users must be the same on every AMS Device Manager station. Consult your network/system administrator about security implications and network concerns.

Synchronize all PC clocks.

NOTE: See your SQL Server documentation for the proper procedure. AMS Device Manager will install the correct components of SQL Server during installation.

Install AMS Device Manager on the Server Plus Station

Install AMS Device Manager on the Server Plus Station first (recommended, but not required). You will need your customer access code during installation.

NOTE: Do not interrupt the installation process except when prompted to reboot the machine, or AMS Device Manager will not be fully installed and will malfunction. Do not remove the installation disk when you reboot the PC.



The Microsoft Windows Server and Workstation services must be running on the PC during installation.

Insert **DVD** in the DVD-ROM drive of the Server Plus Station. If the installation does not start automatically, select **Start→Run** from the Windows taskbar and in the text box, type `D:\AMSDeviceManager_SETUP.EXE` (where D: is the DVD-ROM drive letter) and click **OK**.

Click **Server Plus Station** and follow the prompts.

Determine Computer Names

If you do not know the computer (DNS) name of each PC to be used in your distributed AMS Device Manager system, do the following **on each PC**:



Open the Windows Control Panel.

Double-click the **System** icon.

On the Computer Name tab of the System Properties dialog box, note the computer name; write it in the Computer Name Log, below.

Click **Cancel** when done.

Close the Control Panel window.

Server Plus Station:

Client SC Station 1:

Client SC Station 2:

Client SC Station 3:

Client SC Station 4:

Client SC Station n: (up to 131 client SC stations)

AMS DEVICE MANAGER INSTALLATION DISTRIBUTED SYSTEM

Set Up the Server Plus Station to Recognize the Client SC Stations



Select **Start→All Programs→AMS Device Manager→Station Configuration** from the Windows taskbar on the Server Plus Station.

Click **Add**, enter the computer name of a Client SC Station PC that you want to connect, and click **OK**.*

Repeat for each Client SC Station, and click **Close** when done.

*The Client SC name is not case sensitive – you can enter it in either upper-case or lower-case characters.

Install AMS Device Manager on All Client SC Stations



The Microsoft Windows Server and Workstation services must be running on the PC during installation.

Insert **DVD** in the DVD-ROM drive. If the installation does not start automatically, select **Start→Run** from the Windows taskbar and in the text box, type D:\AMSDeviceManager_SETUP.EXE (where D: is the DVD-ROM drive letter) and click **OK**.

Select **Client SC** and follow the prompts.

Repeat these steps on each AMS Device Manager Client SC Station PC.

NOTE: Do not interrupt the installation process except when prompted to reboot – otherwise AMS Device Manager software will not be fully installed and will malfunction. Do not remove the installation disk when you reboot the PC.

Licensing AMS Device Manager

Licensing for a distributed AMS Device Manager system is done at the Server Plus Station. After receiving your license codes from the AMS Device Manager Registration Center, rerun the Licensing Wizard at the Server Plus Station to complete the licensing process and enable the AMS Device Manager software.



From the Windows Start menu, choose **Start→All Programs→AMS Device Manager→Licensing→Licensing Wizard**.

Follow the prompts in the Licensing Wizard.

Install AMS Device Manager SNAP-ON Application(s)

AMS Device Manager SNAP-ON application capabilities are separately licensed; you can only install a SNAP-ON application if you have licensed it. Most SNAP-ON applications must be installed on each station in a distributed AMS Device Manager system.



Check the SNAP-ON application's documentation for any additional hardware and software requirements.

The Microsoft Windows Server and Workstation services must be running on the PC during installation.

Insert **DVD** in the DVD-ROM drive and select **Start→Run** from the Windows taskbar.

In the text box, type D:\SNAP-ONS And Tools\SNAP-ONS\<FolderName>\SETUP.EXE (where D: is the DVD-ROM drive letter and <FolderName> is the name of the folder for the SNAP-ON application) and click **OK**.

Follow the prompts.

Install SNAP-ON Application(s) continued

Repeat for each licensed SNAP-ON application at each PC in the distributed AMS Device Manager system.

NOTE: The Calibration Assistant SNAP-ON application is enabled through licensing – no separate installation is required.

Set Up AMS Device Manager User Logins

Add a Password to the AMS Device Manager Admin Login

Set up a password for the “admin” username as soon as AMS Device Manager is installed to ensure system security.



Select **Start**→**All Programs**→**AMS Device Manager**→**User Manager**.

In the AMS Device Manager User Manager Login dialog box, enter **Admin** and click **Login** (no password is required initially).

In the AMS Device Manager User Manager window, select the admin username and click **Edit User**.

Enter a password and confirm it.

Ensure all special permissions are checked.

Click **OK**.

Add Other AMS Device Manager User Logins



For a Standard User (see below for a Windows User):

In the AMS Device Manager User Manager window (see above), click **Add User**.

Select the Standard User option and click **Next**.

Enter a username and password and confirm the password.

Select the appropriate permissions for this user. See Books Online for more information.

Click **Finish** to add the new username to the list of users.

Repeat for each additional Standard User.

Click **Close**.

For a Windows User:

Add the Windows Username to the AMSDeviceManager group (see your network administrator).

In the AMS Device Manager User Manager window (see above), click **Add User**.

Select the Windows User option and click **Next**.

Select the username from the list of users, and click **Next**.

Select the appropriate permissions for this user. See Books Online for more information.

Click **Finish** to add the new username to the list of users.

Repeat for each additional Windows User.

Click **Close**.

INSTALLATION INSTRUCTIONS – HANDHELD COMMUNICATOR INTERFACE KIT

Installation Instructions - Handheld Communicator Interface Kit

To connect your 475 Field Communicator to your PC using Bluetooth:



Ensure a Bluetooth adapter using the Windows Bluetooth software and drivers (stack) is connected and enabled on the PC. You may need to restart your PC to ensure the PC recognizes the Bluetooth adapter. See the Release Notes for a list of supported adapters and system requirements.

Ensure the Field Communicator has been added to AMS Device Manager and the default connection type is set to Bluetooth using the Network Configuration utility.

Turn on the 475 Field Communicator and select 'Listen For PC' mode from the main menu. If the default connection type is set to IrDA, change the connection type to Bluetooth.

Wait until the Bluetooth symbol on the Field Communicator keypad is illuminated by a blue light and a 'Waiting for connection' message appears.

Launch AMS Device Manager.

Double-click the Field Communicator icon or right-click the icon and select Open from the context menu.

Select the desired Field Communicator from the 475 Field Communicator Bluetooth Connection dialog box and click Connect.

To connect a different Field Communicator using Bluetooth, right-click the Field Communicator icon and select Open to restart the search for other Field Communicators.

To connect your 475 or 375 Field Communicator to your PC using IrDA:



Ensure an IrDA adapter and driver are installed on the PC. Refer to your IrDA interface operating instructions. See the Release Notes for a list of supported IrDA adapters.

Ensure the Field Communicator has been added to AMS Device Manager and the default connection type is set to IrDA using the Network Configuration utility.

Align the IrDA adapter with the IrDA interface on the Field Communicator.

Turn on the 475 or 375 Field Communicator and select 'Listen For PC' mode from the main menu. If the default connection type is set to Bluetooth, change the connection type to IrDA.

Launch AMS Device Manager.

Double-click the Field Communicator icon or right-click the icon and select Open from the context menu.

THANK YOU FOR PURCHASING AMS DEVICE MANAGER!

AMS Device Manager will increase availability and reduce maintenance costs by helping you eliminate unnecessary maintenance tasks, streamline field device configuration and calibration procedures, and access valuable diagnostic information from your HART®, FOUNDATION™ fieldbus, PROFIBUS DP, PROFIBUS PA, and WirelessHART® field devices. Please use this guide to:

- Verify that all product contents are included to complete successful installation of your new software.
- Verify that your computer hardware meets the minimum requirements to complete successful installation and operation.
- Assist you with the AMS Device Manager installation process.
- Register, license, and begin using AMS Device Manager.

Note: This guide is provided for quick reference purposes, and may not cover all requirements for your installation. Please refer to the AMS Suite: Intelligent Device Manager Installation Guide for comprehensive guidance.

Emerson Process Management

Asset Optimization
12001 Technology Drive
Eden Prairie, MN 55344 USA
T 1(952) 828-3633
F 1(952) 828-3006

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