

Field Data Manager MS21 installation and activation

For PMO and other related or similar applications



Table of contents

- 1. **What is Field Data Manager** 3
- 2. **System requirements** 3
 - 2.1 Virtual or physical servers
 - 2.2 Operating system
 - 2.3 Support databases
- 3. **MS21 – multi-user license** 3
- 4. **Field Data Manager MS21 installation on server** 4
- 5. **Field Data Manager MS21 activation on server** 7
- 6. **Postgre SQL Server – Allowing access to clients**9
- 7. **Installation of Field Data Manager on clients** 11
- 8. **First start of Field Data Manager on clients** 12
- 9. **Firewall requirements** 13
- 10. **Service contact information** 13
- 11. **FAQs** 14

1. What is Field Data Manager

- Used in connection with the Memograph M RSG45 to ensure compliance with 21 CFR Part 11
 - **21 CFR Part 11 Explanation**
 - Electronic records and signatures
- Read/visualize/export/import/and print data
- Tamperproof data storage
- Automatic transfer by ethernet and/or manual transfer by SD card or USB stick
- Templates and naming can be done by the administrator
- User management and electronic signatures according to FDA 21 CFR part 11

2. System requirements

2.1 Virtual or physical servers

- PC with Pentium™ 4 (≥2 GHz)
- PC with Pentium™ M (≥1 GHz)
- PC with AMD™ (≥1.6 GHz)
- Minimum 1 GB RAM cache
- Minimum 20 GB free hard disk memory
- Minimum screen resolution of 1024 x 800 pixel
- CD/DVD drive (For computers without a drive, FDM can also be downloaded from Endress+Hauser's software portal. You will need an account on the software portal software-products.endress.com)

2.2 Operating system

- Microsoft™ Windows™ Server 2019
- Microsoft™ Windows™ Server 2022
- Windows 10™
- Windows 11™
- Windows .NET 2.0/3.5

2.3 Support databases

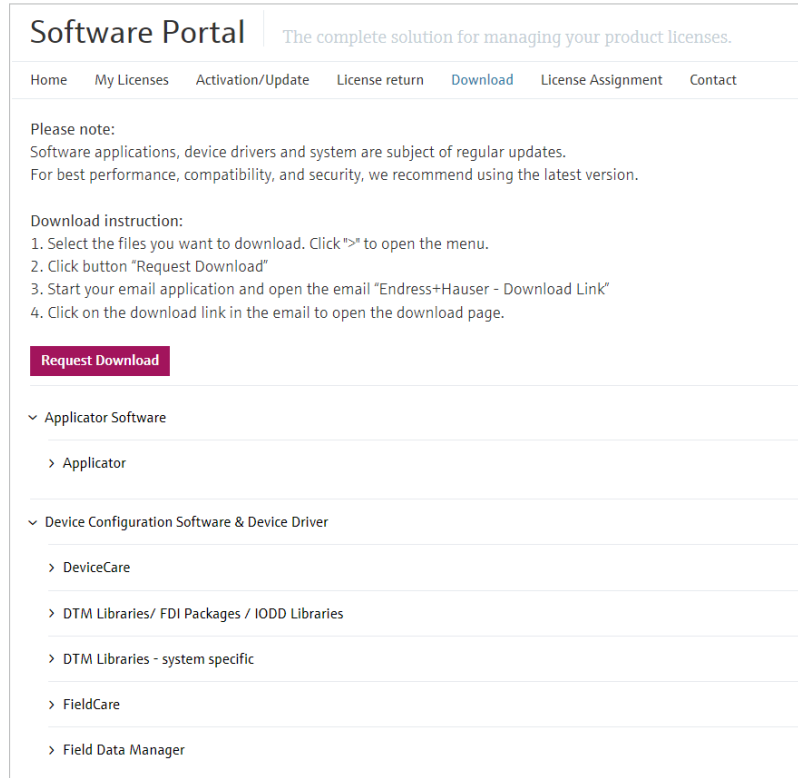
- PostgreSQL (included with software)
- Microsoft SQL Server (version 2005 or higher)

3. MS21 – multi-user license

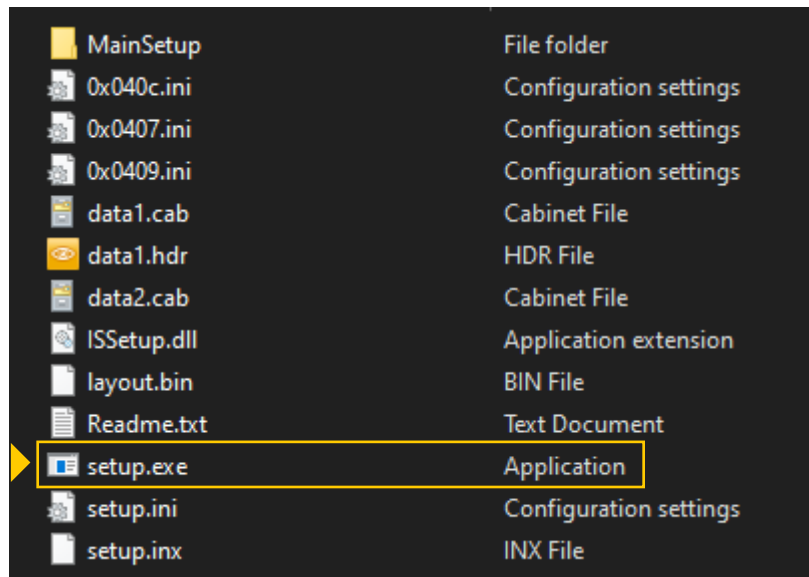
- Distributes 1, 3 or 5 multi-user (floating licenses)
- Activation only done once on server
- Number of computers is not limited
- Number of **active clients** at the same time is **limited** (1, 3 or 5)
 - More can be added with a special order within Endress+Hauser

4. Field Data Manager MS21 installation on server

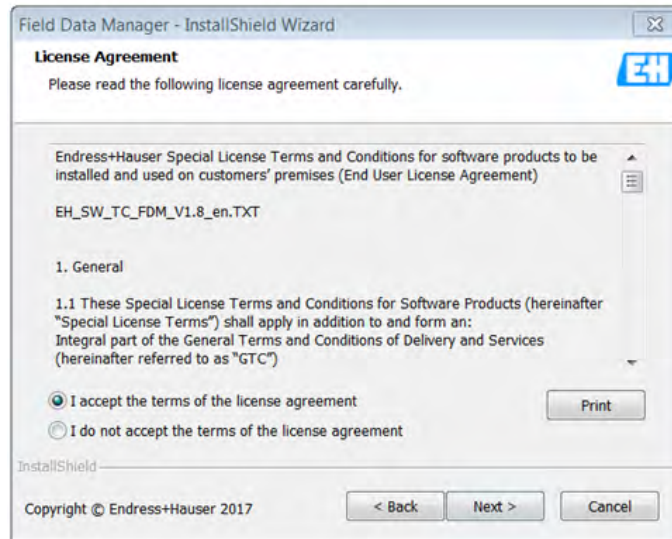
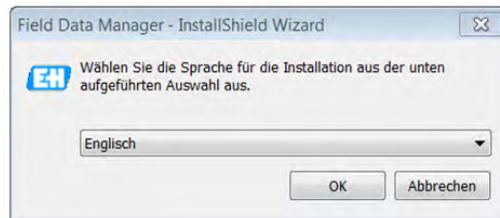
- Create an account for the Endress+Hauser Software Portal
[Software-products.endress.com](https://software-products.endress.com)
- Download Field Data Manager from the downloads tab



- Launch the Field Data Manager installer by selecting the setup.exe executable in the main folder
 - Do not go into the “main setup folder” as a crucial step will be missed



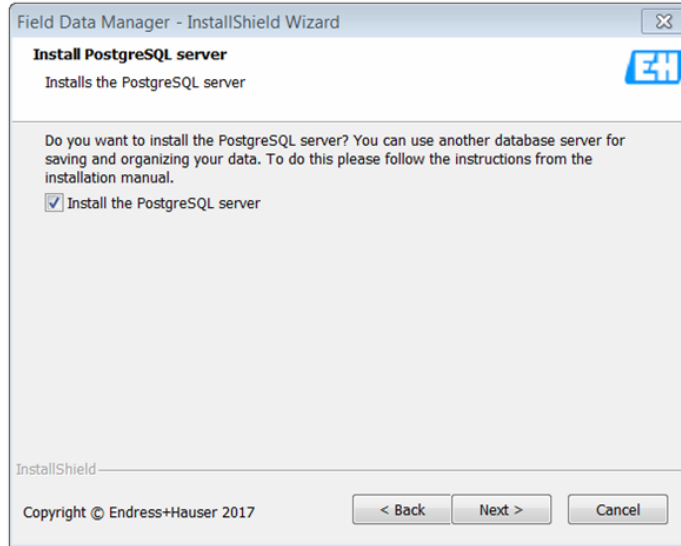
- Select the language and accept the license agreement



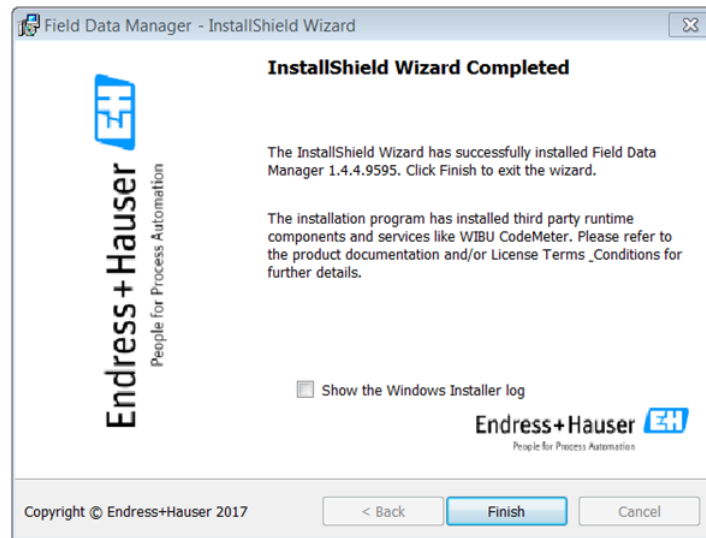
- Identify the installation folder if applicable



- Ensure check box is selected to install the PostgreSQL
 - If you are using the Microsoft SQL server or Oracle SQL server, you may deselect this check box



- Allow installation for the automatic services and database initialization tools



- Installation is now complete on the server

5. Field Data Manager MS21 license activation on server

MS21-ABA3 Field Data Manager version is recommended for PMO-related applications – order as download via www.endress.com

- After launching the software, an activation screen will pop up – there will be an “Activate Professional Version” where you will input the Software ID you received

Software Activation

Field Data Manager Software - Trail period

Warning (SLM-A10): The software is running in trial mode. The software can be operated with unlimited capability and capacity. The trial license will expire in 19 days. Please activate the software.

Extend trial period

Activate Essential version

Activate Professional version

Enter the software ID you received with the purchased software.

Software ID - - - -

Ok Cancel

- Login with the credentials you made for the Endress+Hauser Software Portal Software-products.endress.com

Software Activation

Please enter your user credentials of the Endress+Hauser software portal (www.software-products.endress.com). Please perform a registration if you do not have an account.

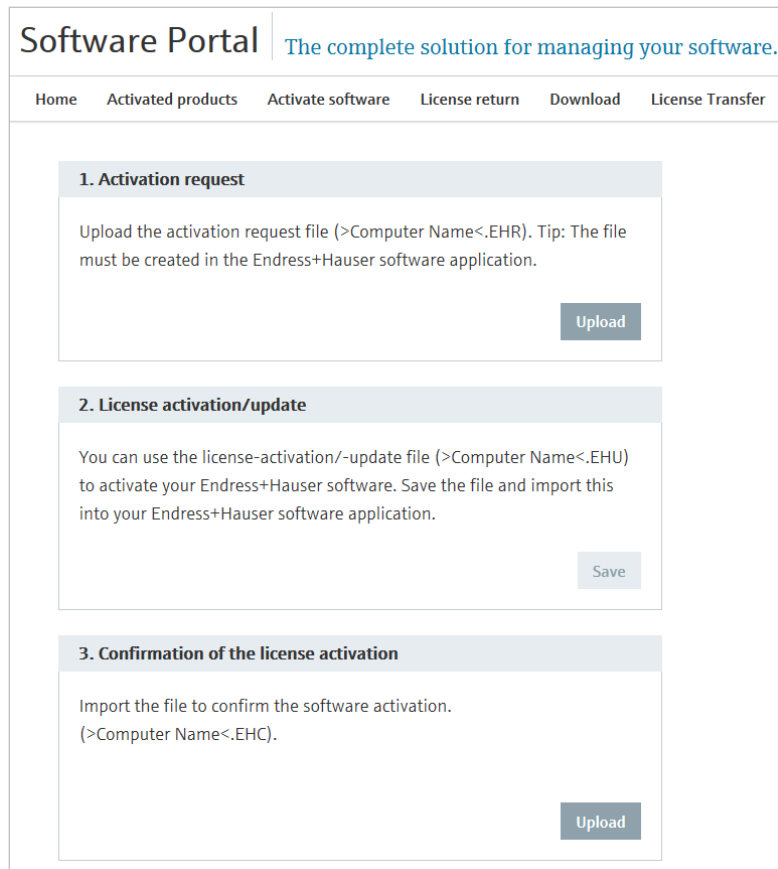
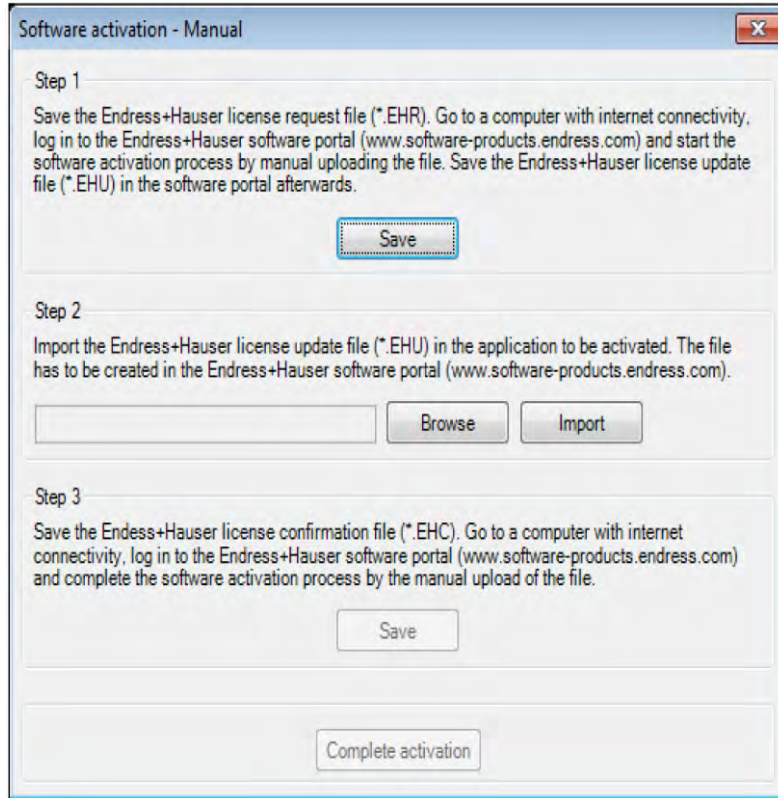
E-mail address

Password

[I have forgotten my password](#)

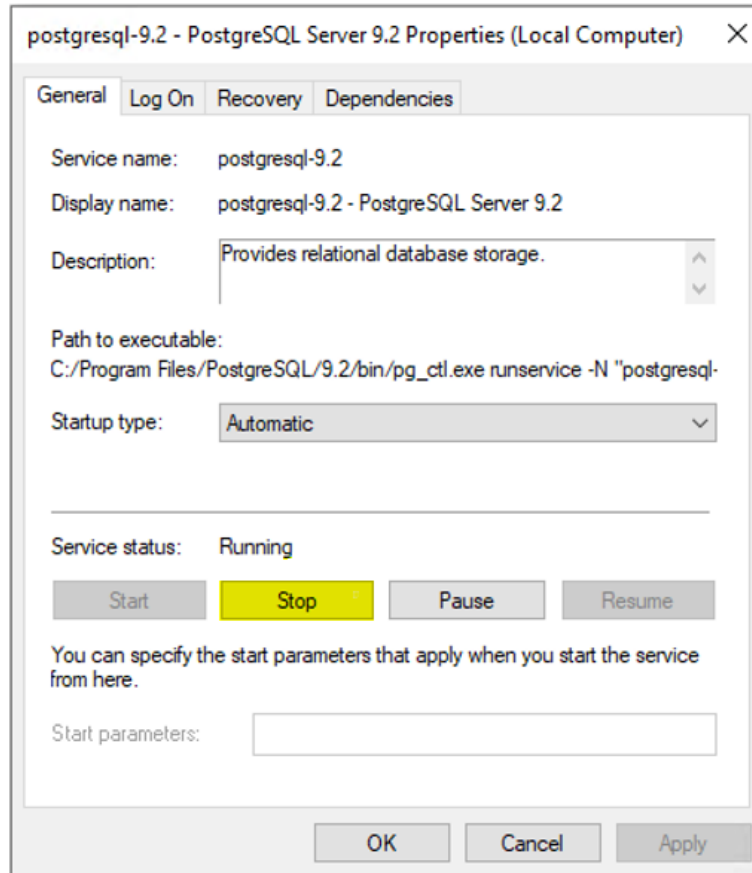
Activate now Create account Cancel

- If manual activation is needed (server has no internet connection), a new screen will pop up – follow the steps and use the “License Activation” tab of the software portal to complete this action.

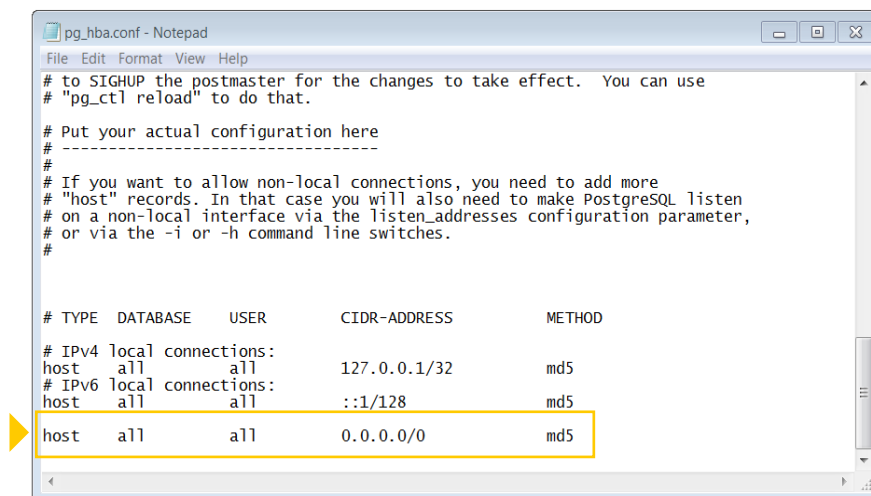


6. Postgre SQL on the server – allowing access by the clients

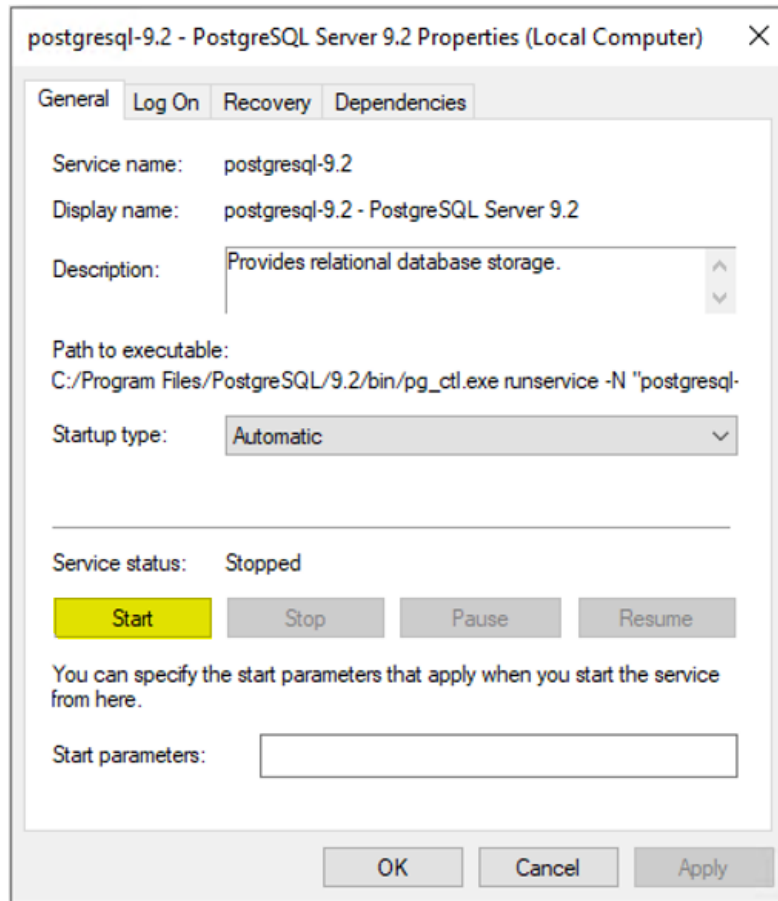
- The Postgre SQL Server will be used to store the database in which all data will be stored tamper-proof as well as distributing the licenses to active clients
- Stop the Postgre Windows Service in the Control Panel – Administrative Tools – Service



- In the below file path, open the file pg_hba.conf and add the following line:
 - **C:\program files\PostgreSQL9.2\data**
 - Add line: **host all all 0.0.0.0/0 md5**



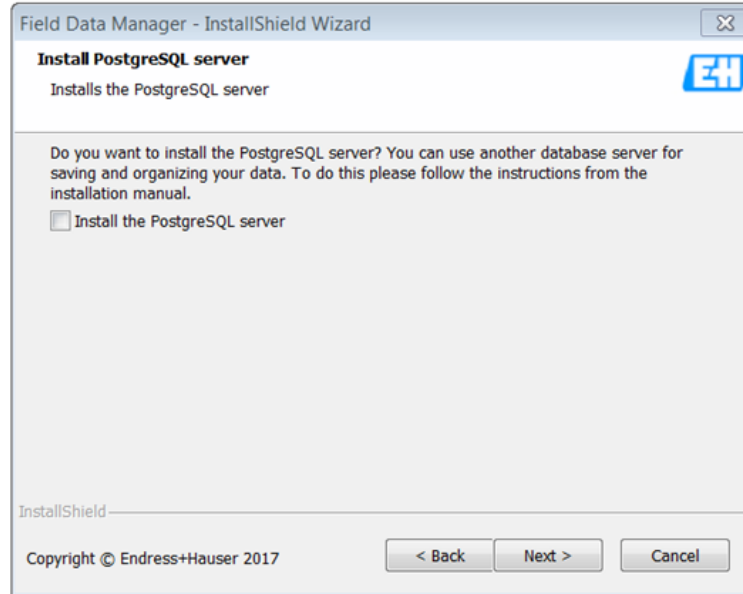
- Restart the Postgre Windows Service in Control Panel – Administrative Tools – Service



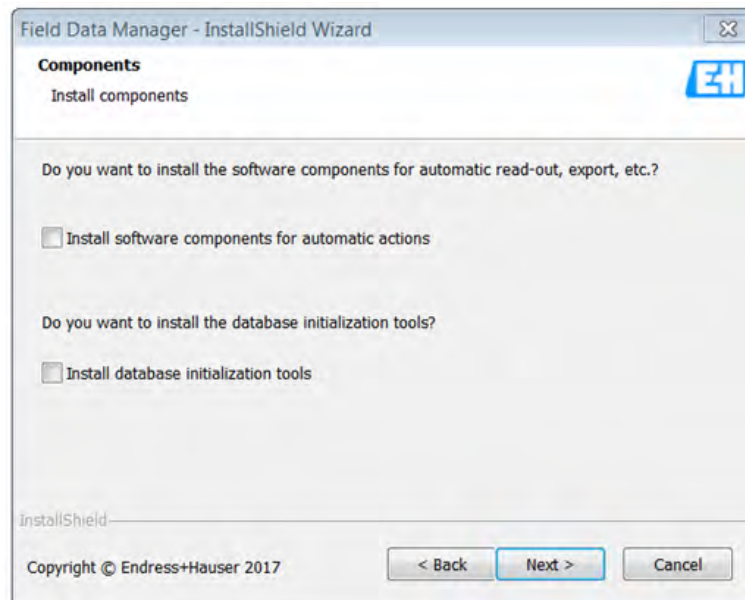
- Client access has been enabled

7. Installation of Field Data Manager on clients

- Follow the same steps as the installation Field Data Manager on the server minus what is listed below
 - It is not necessary to install the PostgreSQL server on the client



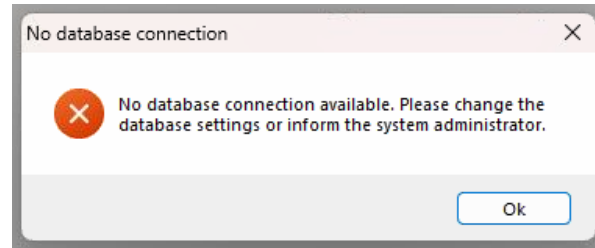
- It is not necessary to install the components for automatic job or the database initialization tools



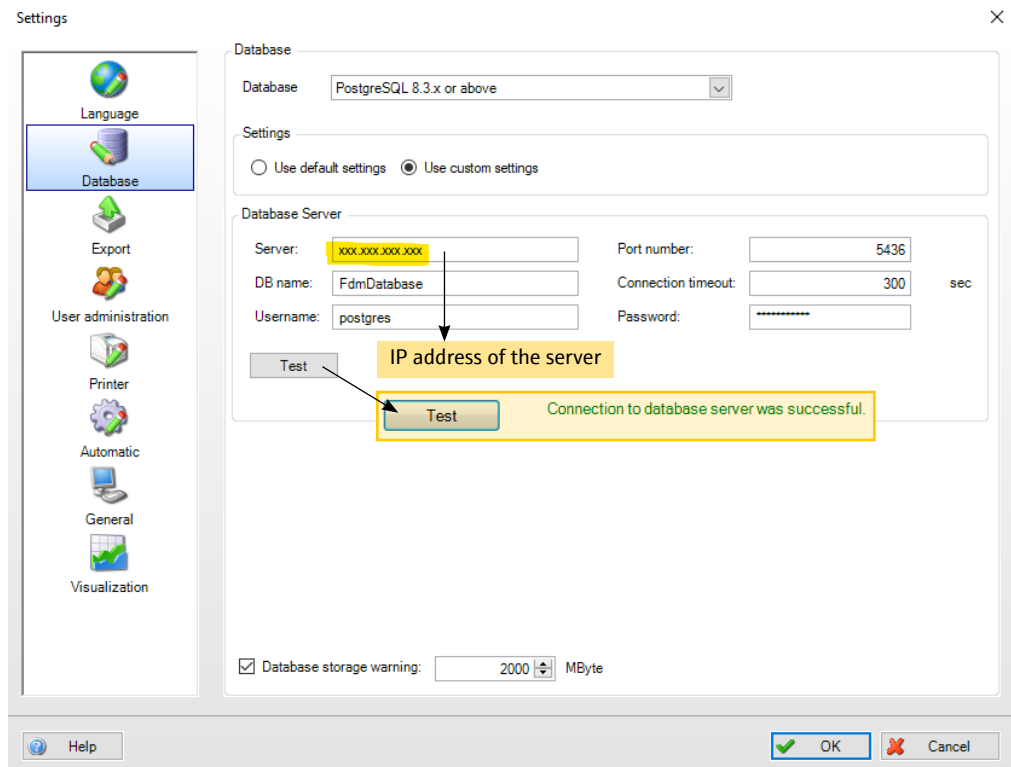
- After the install is complete, a message will pop up stating "No Postgre database server found"
 - This can be ignored and move on to the next step

8. First start of Field Data Manager on the client

- On the first launch, an error message will pop up stating “No database connection” as seen below



- Select “Extras” at the top left and then open the settings
- Enter the Database settings and update the server IP address to match the IP address of the server and hit the “Test” button; upon successful connection to the database, license will be issued to that client until the user has logged out



- If the database connection fails, please reference section 8 and confirm the appropriate firewall rules are allowed on the network
- Repeat this with all necessary clients to complete the full installation

9. Firewall requirements

The following ports MUST be open in both directions for proper operation of Field Data Manager MS21:

- 8000 Field Data Manager read out of historical data
- 8001 Field Data Manager automatic batch read (Memograph M RSG45 with batch package)
- 8002 Field Data Manager read out online values
- 8007 Field Data Manager data server for online values
- 5436 Postgre SQL Server
- 22350 WIBU Codemeter for software license management

10. Service contact information

For questions that cannot be answered in this manual, the Endress+Hauser support group can be accessed by either way listed below:

- Support line: 888-ENDRESS -> option 1 for customers -> option 2 for support -> option 4 for TRS support OR option 5 for software support.
- Open a support ticket from the link below:
 - **Get the support you need, fast! | Endress+Hauser**
 - Scroll to the bottom to “Reach technical support”
 - Select the “Open support ticket” link and fill out the required fields.

11. FAQs

What is the difference between MS20 and MS21?

- MS20 is a single station license that can be used on one PC only.
- MS21 is a multi-station license that utilizes a server to distribute licenses to active clients, up to five concurrent users depending on the license configuration.

What is the difference between the “Essential” version and the “Professional” version?

- The “Essential” version is a free version of Field Data Manager that is limited on operability.
- The “Professional” version is the paid version that allows full access to all possible functions of Field Data Manager.
- Please reference page 3 and 4 of the [MS20/21 Operating Manual](#) for the different functions and which is allowed on the “Essential” version.

What is the ‘Software ID’ that Field Data Manager is asking for when I first launch?

- When MS21 is purchased, a Software ID is generated with a serial number that will be sent to you. If you do not have this number and have purchased the license, please contact your representative or reach out to our support team.
- The number will be 25 characters long broken up in 5 sections: xxxxx.xxxxx.xxxxx.xxxxx.xxxxx

What is my username and password when I try to activate my license?

- Field Data Manager requires you to link your software to an active software portal account.
- The link to this software portal is software-product.endress.com

When I try to activate my software, it says there is no internet connection and asks for a “manual activation”. How do I do this?

- Reference section 4 on page 7 for how to complete the manual activation. A separate computer with internet connection is required.

I finished installing Field Data Manager on the server, but I am getting a “no database connection” error when I launch the software?

- When utilizing the default database connection Field Data Manager uses, you must ensure that the checkbox for “install PostgreSQL server” is selected for it to be installed. Please see section 3 on page 3 to ensure the correct install file is being used as well as section 3 on page 4 for the necessary checkbox.
- If a Microsoft SQL Server or Oracle SQL Server is being used, then the checkbox most likely was left blank. Navigate to Extras -> Settings -> Database to link the server. Please see the [Short Instruction](#) (starting on page 30) that has the necessary information for these servers.

After installing the software on the clients, I am getting a “no database connection” error when I launch the software?

- This popup is normal as when the installation is done for MS21 clients, you do not need to install the server/database. This is because the client must reference the database being used by the server. See section 7 on page 11 for this information.

I added the correct IP address for my server in the database settings of my client but am receiving a “Test connection failed” message?

- It is best to first check that the server does have access to the client and vice versa. To do this, we can utilize the “Command Prompt” application.
 - On the client side, open the application and type “ping” and then the IP address of the server. Example: ping 192.168.1.212
 - The same can be done on the server side by typing “ping” and then the IP address of the client.
 - If a successful connection is achieved, a message will appear stating that a reply has been received.
 - If a failed connection occurs, a message will appear stating “not reachable” or “timeout”. The network must then be visualized to find the roadblock.
- If a successful ping occurs, it is best to get with the network IT team to ensure that the firewall rules stated in section 8 on page 12 are unblocked for network traffic BOTH ways.

I can connect to Memograph M RSG45 webserver but cannot read values into Field Data Manager?

- If you can access both Field Data Manager and the webserver of Memograph M RSG45, the issue most likely lies with the firewall rules. See the required ports for operation above in section 8, page 12.

I have a local PostgreSQL server database, but my Field Data Manager installation cannot connect to it?

- First, check that the service is running. Search for “services” in the windows bar and select it to open it. Once open, scroll and look for “postgresql.....” and ensure it is running.
- If it is not shown here, you must redo the installation with the server selected. See page 4 to reference the point in the installation for the database.
- If it is shown here in the list and is “running” or “started”, then follow the below instructions:
 - In the installation folder, run the InitPostgreSQL.exe, and select “Create Schema”. The default settings are correct for the local database.
 - Default installation folder - C:\Program Files (x86)\Endress+Hauser\Field Data Manager Software
 - If the executable is not in the installation folder, please contact the Endress+Hauser service team.

We are swapping servers/PCs and I need to transfer my license.**What is required to do this?**

- You must return the license on the old server (PC) and the license on the new server (PC). To do this, you can navigate to the below menu and select “Return License”:
 - Help -> License Information -> License Information & Management
- Once you select “Return License”, you will be required to login to authorize the return.
- Once completed, the license is ready to be reactivated on the new server/PC.

www.addresses.endress.com

GL01055B/24/EN/01.26-00