FieldCare, DeviceCare
Getting Started

Endress+Hauser
People for Process Automation

1 Revision history

Product version	Document	Changes/comments
▪ FieldCare: 2.13.xx ▪ DeviceCare: 1.05.xx	KA01303S/04/A2/04.18	New product version DeviceCare: new product version
▪ FieldCare: 2.14.xx ▪ DeviceCare: 1.06.xx	KA01303S/04/A2/05.19	New product version
▪ FieldCare: 2.14.xx ▪ DeviceCare: 1.07.xx	KA01303S/04/A2/06.20	New setups (new components) DeviceCare: new product version
▪ FieldCare: 2.15.xx ▪ DeviceCare: 1.07.xx	KA01303S/04/A2/07.20	New FieldCare product version ▪ Software license management ▪ USB stick replaces DVD
▪ FieldCare: 2.16.xx ▪ DeviceCare: 1.07.xx	KA01303S/04/EN/08.22-00	Section 4.3: Note on software update service
▪ FieldCare: 2.17.xx ▪ DeviceCare: 1.07.xx	KA01303S/04/EN/09.22-00	New FieldCare product version ▪ FDI Package support ▪ Security update

2 Document information

2.1 Document function

These instructions contain all the information needed to install and update the software.

2.2 Symbols used

Symbol	Meaning
	Open the start page of the Installation Manager.
	Open the language setting.
	Additional information about the software.

Symbol	Meaning
	Close the application.
	Jump back to the last page opened.
	Information about FieldCare, modem, Fieldgate, Field Xpert.
	Open the keyboard.
	Full screen.
	Exit full screen.

3 Product description

3.1 Software function

The Installation Manager guides the user through the installation of all the FieldCare components which are delivered within the FieldCare package (frame application, driver, CommDTM-files, DeviceDTM-files, tools). Administrator rights are needed to perform the installation.

3.2 Software license management (SLM)

3.2.1 FieldCare SFE500 licensing model

FieldCare is delivered with a free, time-limited trial license. The licensing agreement (EULA) applies for the use of the license. If FieldCare is to be used on a permanent basis, FieldCare must be purchased and the license activated with the software ID provided.

The FieldCare licensing model consists of a basic module called "Plant Asset Management" (PAM) and an extension called "Condition Monitoring". A license comprises a combination of the PAM module plus any extensions.

To be able to use the current FieldCare version, the software must be activated with the software ID. The license key of the previous FieldCare versions (< 2.15.00) can no longer be used for the current FieldCare version. For more information, visit www.endress.com/sfe500 or contact your local Endress+Hauser sales partner.

Software license management offers the following functions:
- Use of the software in trial mode for 60 days
- Permanent activation of the software (with or without Internet connectivity)
- License renewal
- Return of the license

Activating the software permanently

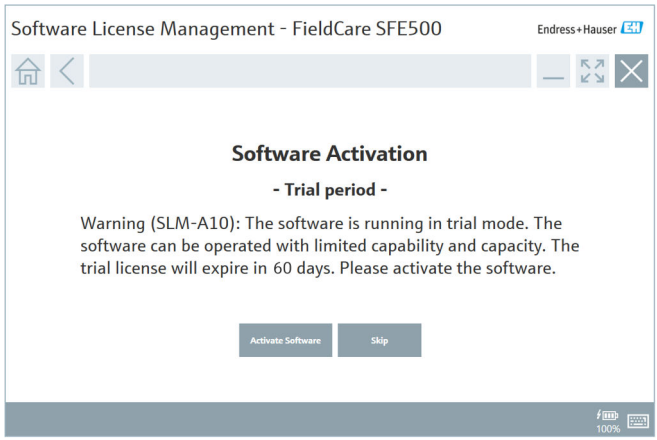
Prerequisites:
- The software is installed on the computer
- The licensing agreement (EULA) has been accepted

Activating the software permanently with Internet connectivity

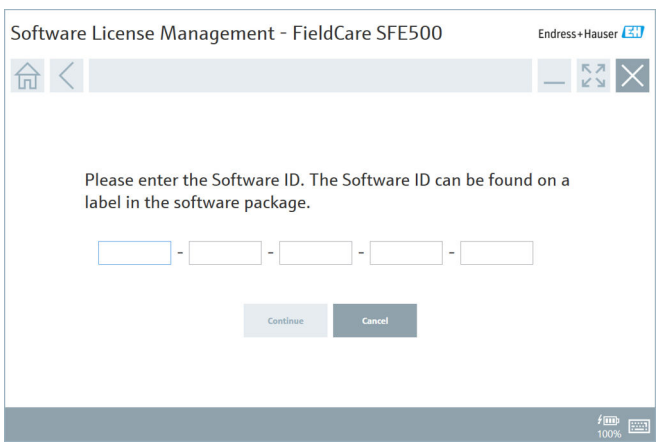
Prerequisites:
The software ID is available

The software ID is located on the label of the USB box containing the FieldCare USB stick or in the e-mail sent by Endress+Hauser on delivery of the product.

1. Start the software.
   ↳ The **Software activation** window is displayed:

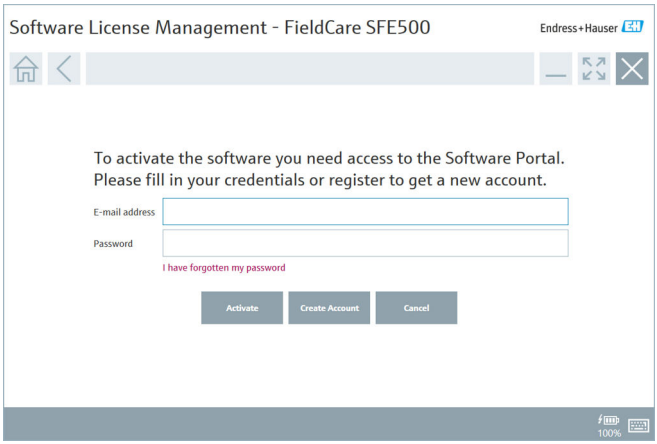


2. Click the **Activate** button.
   ↳ The **Software license management** window for entering the software ID is displayed.



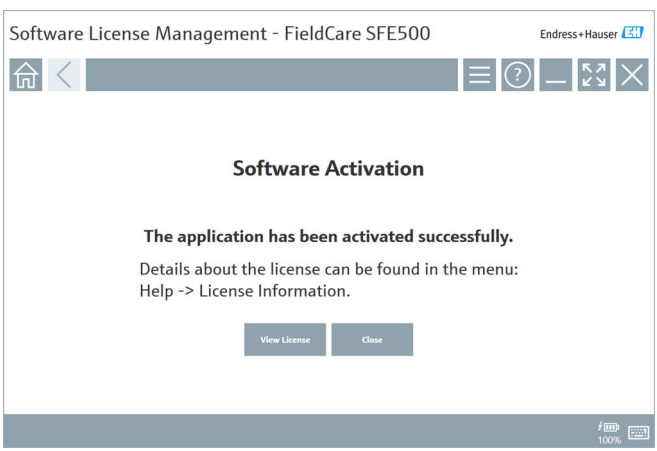
3. Enter the software ID.
   ↳ A symbol confirms the correct software ID has been entered.

4. Click the **Continue** button.



5. If you already have a user account for the Endress+Hauser software portal: enter the e-mail address and password and click **Activate**.

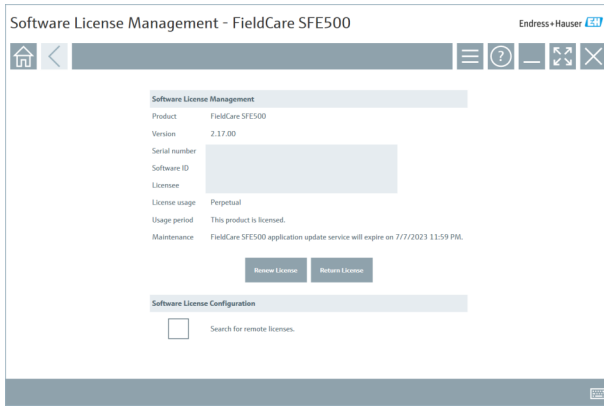
   ↳ The following window appears if the software has been activated successfully:



6. If you do not yet have a user account for the Endress+Hauser software portal, return to step 4 and click the **Create account** button.

After activation, you can view the license information:

1. Click the **Close** button.
   ↳



   The window displays all the relevant information for the license, such as the serial number, licensee etc.

2. Click the X (☒) in the top right-hand corner to close the window.
   ↳ After a moment, the **FieldCare** program starts.

Software license configuration

The **Search for remote licenses** checkbox can be enabled or disabled. The option is given for performance reasons. If the checkbox is enabled, the computer searches for valid software licenses in the network that are offered by a license server. If the checkbox is disabled, a valid software license must be installed locally on the computer. The option prevents the computer from scanning for licenses in the network.

If necessary, the **Software license management** function can be opened via the FieldCare menu **Help** and **License information**.

Activating the software permanently without Internet connectivity

If the computer does not have Internet access, the license can also be activated manually.

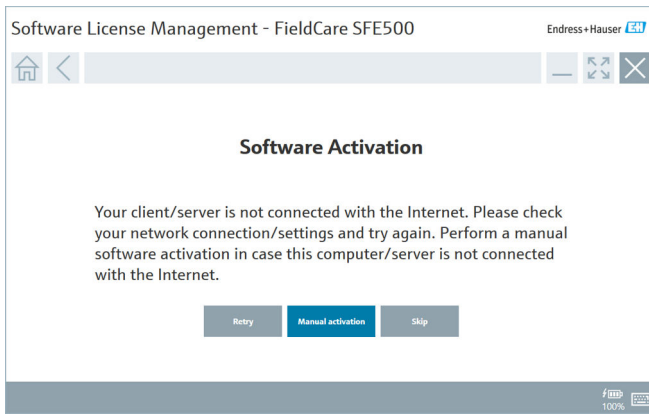
Prerequisites:
- A portable storage device, e.g. a USB stick
- A second computer with Internet access

Overview of the manual activation process

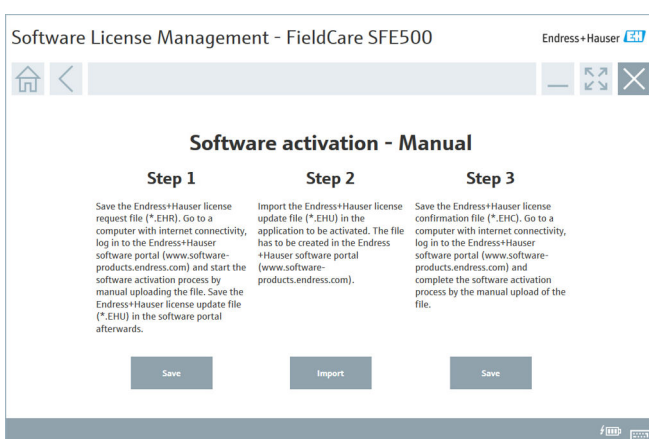
Computer with FieldCare, but no Internet access	**USB stick**	**Computer with Internet access**
"Software activation - Manual" window		**In the Endress+Hauser software portal**
Step 1		
Action: Save license request file (*.EHR) on USB stick.	=>	**1. Activation request**
		Action: Upload license request file (*.EHR) from USB stick.
		2. License activation/update
Step 2	<=	**Action:** Save license update file (*.EHU) on USB stick.
Action: Import license update file (*.EHU) from USB stick.		
Step 3		
Action: Save license confirmation file (*.EHC) on USB stick.	=>	**3. Confirmation of license activation**
		Action: Upload license confirmation file (*.EHC) from USB stick.

Detailed description

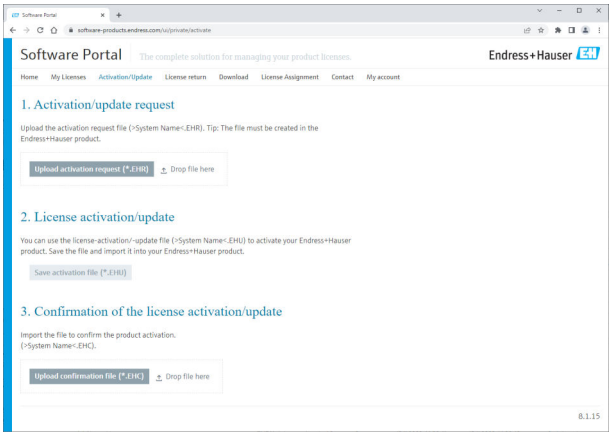
1. Carry out steps 1 to 4 as described in the section **Activating the software permanently with Internet connectivity**.
   ↳ The **Software activation** window is displayed with the message Your client/server is not connected with the Internet.



2. Click the **Manual activation** button.
   ↳ The **Software activation – manual** window is displayed.

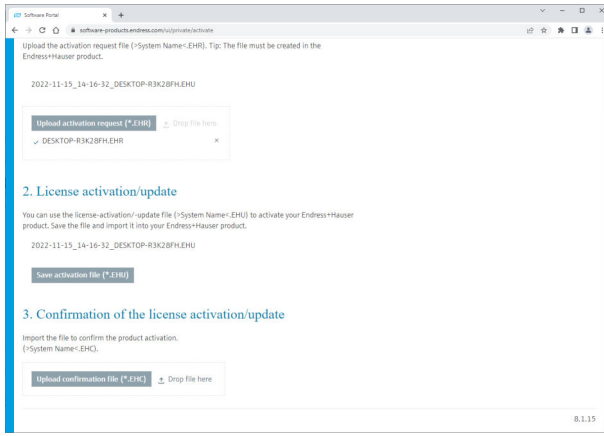


3. Click the **Save** button under **Step 1**.
   ↳ The Windows dialog **Save as...** opens.
4. Save the license request file (*.EHR) on a USB stick.
5. Take the USB stick to a computer with Internet access.
6. On this computer with Internet access, go to the Endress+Hauser software portal: https://software-products.endress.com
7. Log onto the Endress+Hauser software portal.
8. Select the **Activation/update** menu.
   ↳ The following view is displayed:



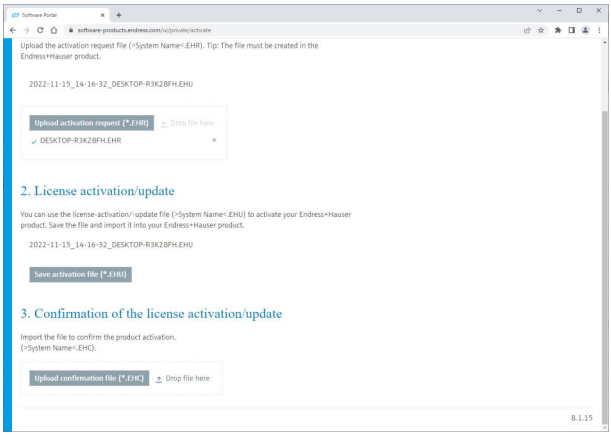
9. Under **1. Activation request**, click the **Upload** button.
10. Upload the license request file (*.EHR) from the USB stick.
    ↳ If the upload was successful, the following message is displayed: The activation request file has been successfully processed. Continue with **step 2** in the **Software activation – manual** window.

11. Select **OK** to confirm the message.
    ↳ The name of the activation file "*.EHU" is displayed:



12. Click the **Save** button.
13. Save the license update file (*.EHU) on the USB stick.
14. Take the USB stick to the computer where FieldCare is installed (no Internet connection). Make sure you do not log out of the Endress+Hauser software portal. On the computer without an Internet connection, the **Software activation - manual** window continues to be displayed.
15. Under **Step 2** click the **Import** button.
16. Upload the previously saved license update file (*.EHU) from the USB stick.
17. Click the **Save** button under **Step 3**.
    ↳ The Windows dialog **Save as...** opens.
18. Save the license confirmation file (*.EHC) on the USB stick.
19. Click the X (☒) in the top right-hand corner to close the window.
    ↳ After a moment, the **FieldCare** program starts.
20. Take the USB stick to the computer with Internet access. You are still actively logged into the Endress+Hauser software portal.

21. Scroll down to **3. Confirmation of the license activation**.



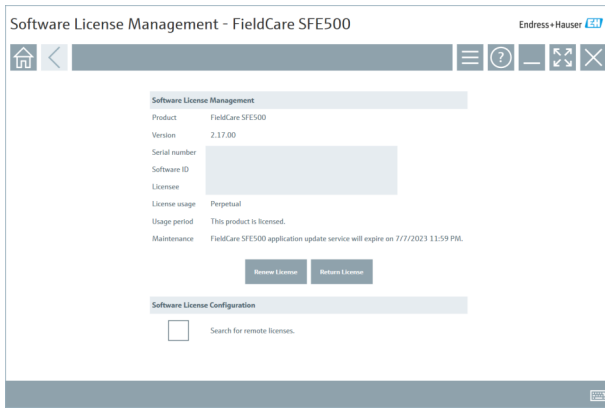
22. Click the **Upload** button.
23. Upload the saved license confirmation file (*.EHC) from the USB stick.
    ↳ If the upload was successful, the following message is displayed: **The activation of the product has been confirmed successfully.**
24. Select **OK** to confirm the message.

FieldCare is now permanently activated. The license status and license details can be checked on the Endress+Hauser software portal under **Products**.

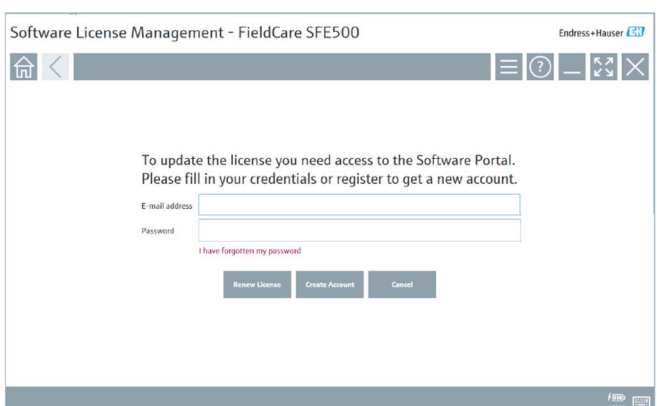
Updating the software license

Prerequisites:
- The software is installed on the computer
- The software is licensed

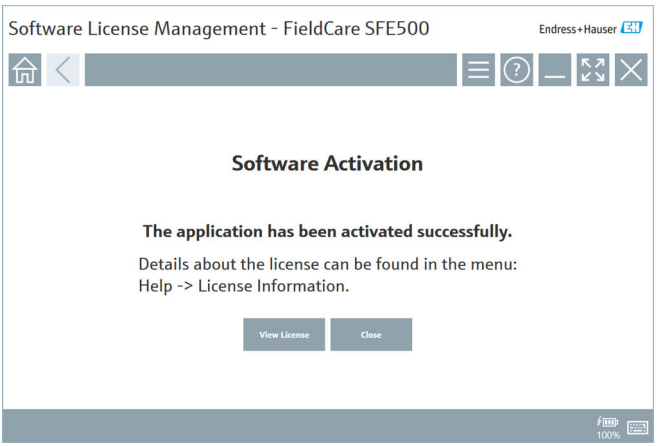
1. Open the **Software license management** function via the FieldCare menu **Help** -> **License information**.
   ↳ The following window is displayed:



2. Click the **Renew license** button.
   ↳ The **Login to software portal** window is displayed.



3. Enter your e-mail address and password, then click **Renew license**.
   ↳ The following window appears if the software has been activated successfully:

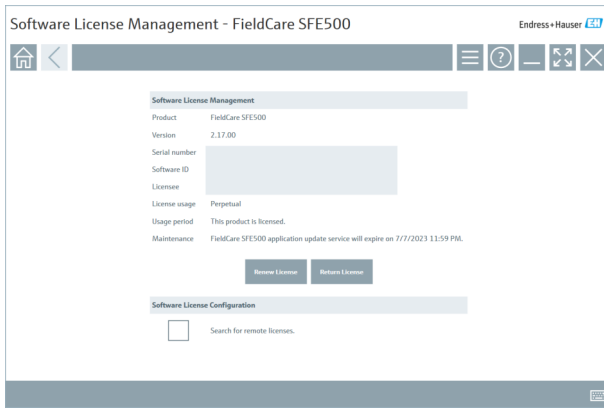


4. If you do not yet have a user account for the Endress+Hauser software portal, first click the **Create account** button in Step 2.

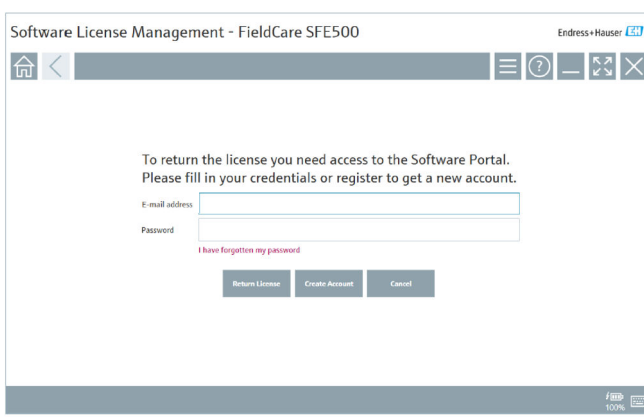
Returning the software license

Prerequisites:
- The software is installed on the computer
- The software is licensed

1. Open the **Software license management** function via the FieldCare menu **Help** and **License information**.
   ↳ The following window is displayed:



2. Click the **Return license** button.
   ↳ The **Login to software portal** window is displayed.



3. Enter your e-mail address and password, then click **Return license**.
   ↳ If the software was returned successfully, the **Return license** window appears with the message: **The software has been successfully returned**.

4 Installation

Some components take a long time to install. To avoid problems, do not cancel the installation unless requested to do so.

4.1 System requirements

Prior to installation, install the necessary software, e.g. Microsoft.NET 3.5/4.x and PDF Reader.

In the database mode, FieldCare versions up to 2.10.xx use SQL Server 2008 for data archiving. FieldCare versions from 2.11.xx are compatible with Windows 10, provided that the database is updated at least to SQL Server 2014.

Installation and update scenarios supported by version 2.17.xx:

Installed operating system	Installed SQL Server	FieldCare database [1]	FieldCare	Procedure
Windows 10	No	No	Not installed	▪ Install FieldCare 2.17.xx incl. SQL Server 2014 ▪ The FieldCare database is installed
Windows 10	SQL Server 2014 or SQL Server 2016	No	Not installed	▪ Install FieldCare 2.17.xx. ▪ Use existing SQL Server. ▪ The FieldCare database is installed
Windows 10	▪ No ▪ SQL Server 2008	No	Not installed	▪ Install SQL Server 2014. ▪ Install FieldCare 2.17.xx. ▪ The FieldCare database is installed
Windows 10	SQL Server 2008	Yes	▪ Not installed ▪ Older version of FieldCare	▪ Install FieldCare 2.17.xx. ▪ Use existing SQL Server. ▪ The existing FieldCare database is used

1) The SQL Server contains a database that can be used by FieldCare for data archiving.

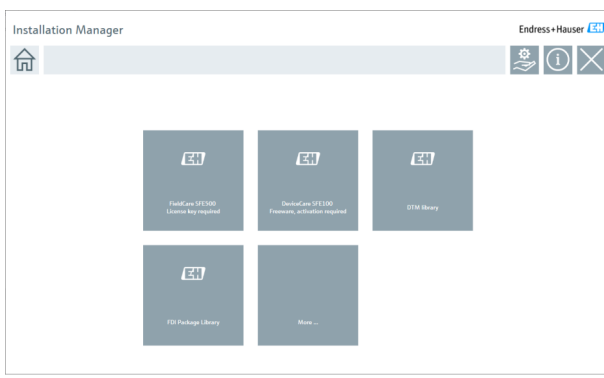
The FieldCare setup does not support an installation that involves upgrading the Windows version.

A pre-installed SQL Server is not updated automatically during a Windows upgrade. If SQL Server 2012 or older is installed, it will no longer work following the upgrade and neither will any pre-installed applications that require an SQL Server.

1. Make a backup of the FieldCare database in the SQL Server, the DB backup and the user files.
2. Upgrade installed Windows version to Windows 10.
3. Install FieldCare with SQL Server 2014.
4. Restore the data backed up previously.

4.2 Installing the software

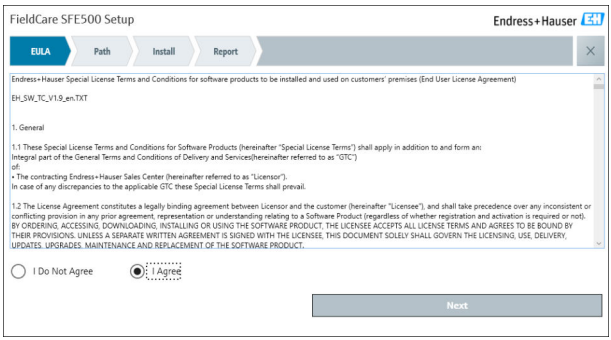
1. Insert the FieldCare USB stick into a USB port and navigate to the root folder with Windows File Manager.
2. Start the FieldCare installation program (InstallationManager.exe).



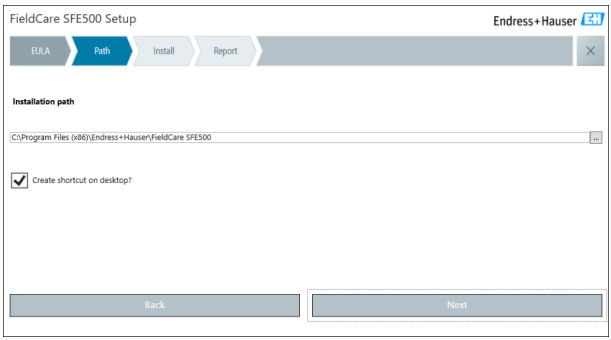
Options on the Installation Manager start page:
- FieldCare SFE500 installation → 18
- DeviceCare SFE100 installation → 20
- DTM library installation → 21
- FDI Package library installation → 24
- More → 24

4.2.1 Installing FieldCare SFE500

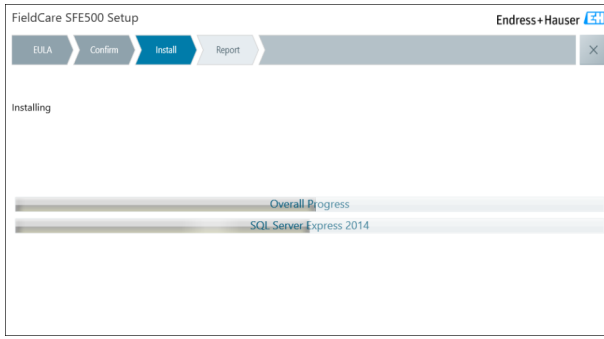
1. Click **FieldCare SFE500** on the Installation Manager start page.
   ↳ The "EULA" tab opens.



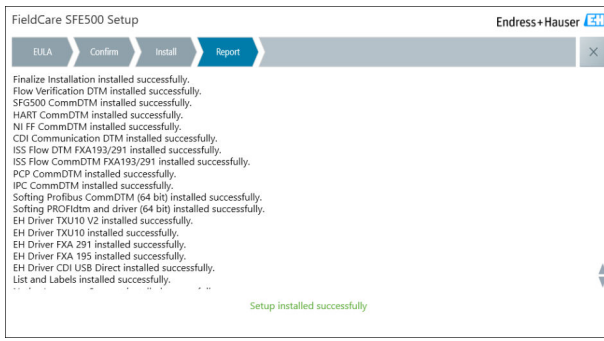
2. Select **I agree** to accept the license agreement and click **Next**.
   ↳ The "Path" tab opens.



3. Select the installation path and click **Next**.
   ↳ The "Install" tab opens and **FieldCare** is installed.



Following installation, the "Report" tab opens.

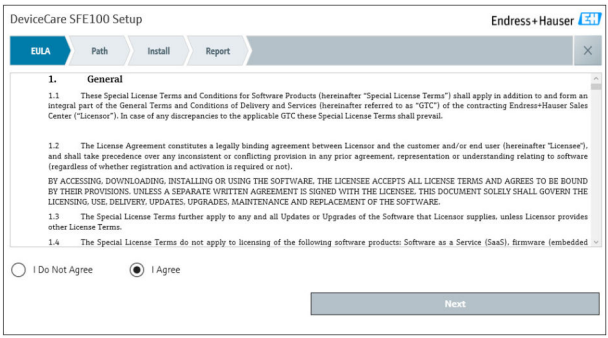


4. Close the dialog box.

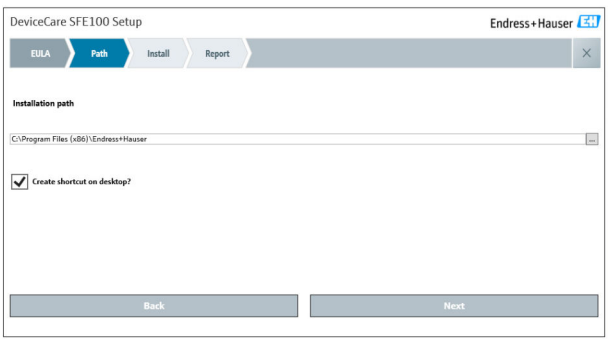
The database password must be changed following successful installation of FieldCare. The database's standard password cannot be used.

4.2.2 Installing DeviceCare SFE100

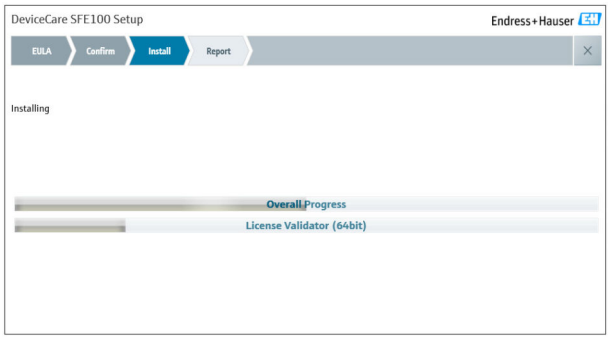
1. On the Installation Manager start page, click **DeviceCare SFE100**.
   ↳ The "EULA" tab opens.



2. Select **I agree** to accept the license agreement and click **Next**.
   ↳ The "Path" tab opens.



3. Select the installation path and click **Next**.
   ↳ The "Install" tab opens and **DeviceCare** starts to install.



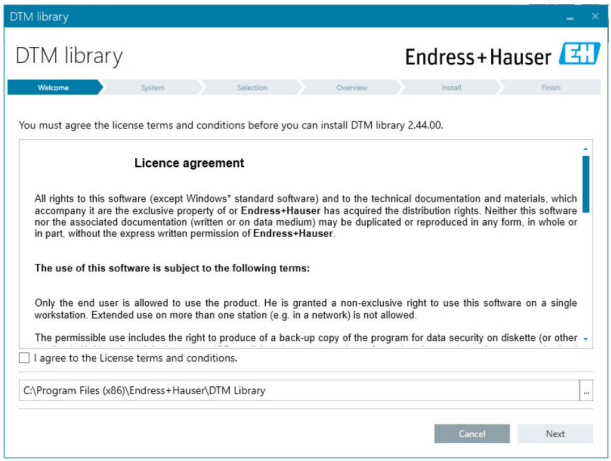
Following installation, the "Report" tab opens.

4. Close the dialog box.

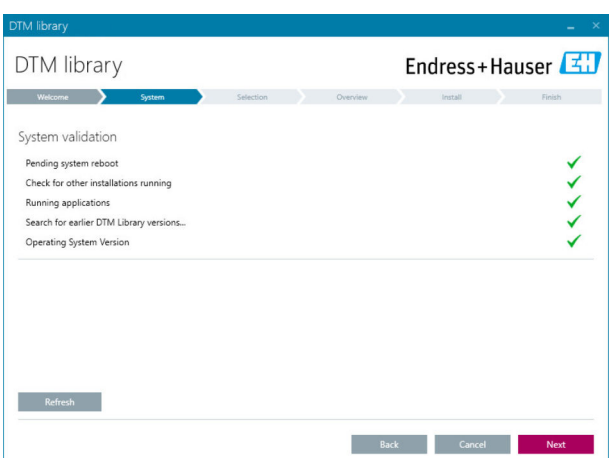
4.2.3 DTM library

To be able to access the devices, the required DTMs and DTM libraries must be selected and installed.

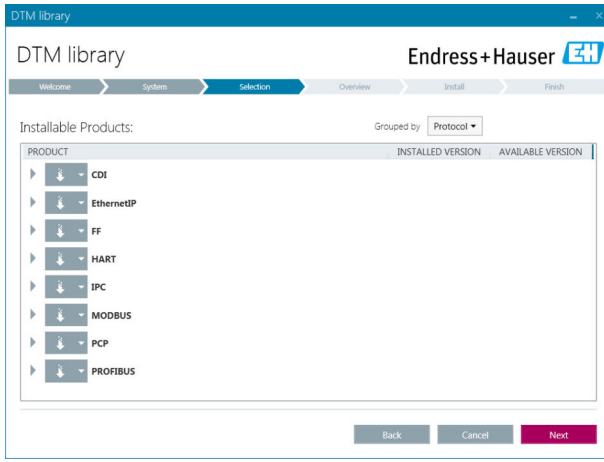
1. Click **DTM library** on the Installation Manager start page.
   ↳ The "Welcome" tab opens.



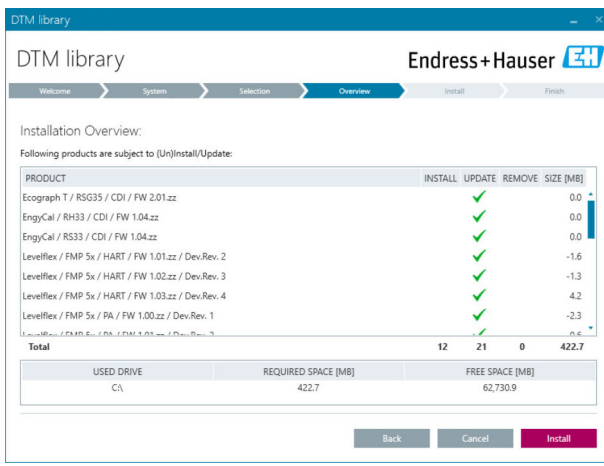
2. Accept the license conditions and click **Next**.
   ↳ The "System" tab opens.



3. Click **Next**.
   ↳ The "Selection" tab opens.



4. Select the products that need to be installed and click **Next**.
   ↳ The "Overview" tab opens.



5. Click **Install**.
   ↳ The DTM library starts to install and displays a message to confirm that installation was successful.
6. Click **Close**.
   ↳ The start page of the Installation Manager opens.

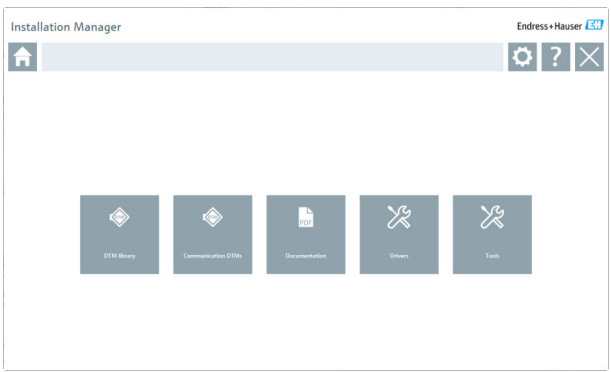
4.2.4 FDI Package library

To be able to access the devices with FDI Packages as device drivers, the required FDI Packages or FDI Package libraries must first be installed.

1. Click **FDI Package library** on the Installation Manager start page.
2. Continue to follow the installation instructions.

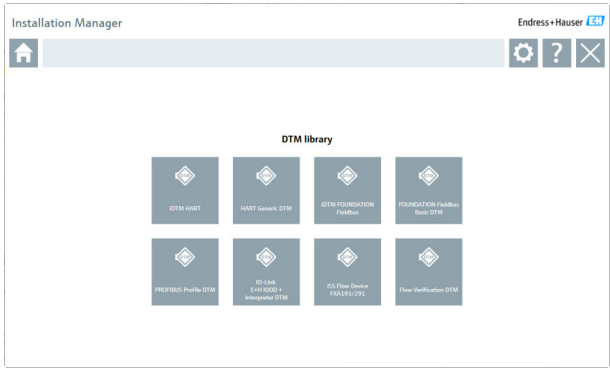
4.2.5 More

▶ Click **More** on the Installation Manager start page.
   ↳ The dialog box with the selection options opens.



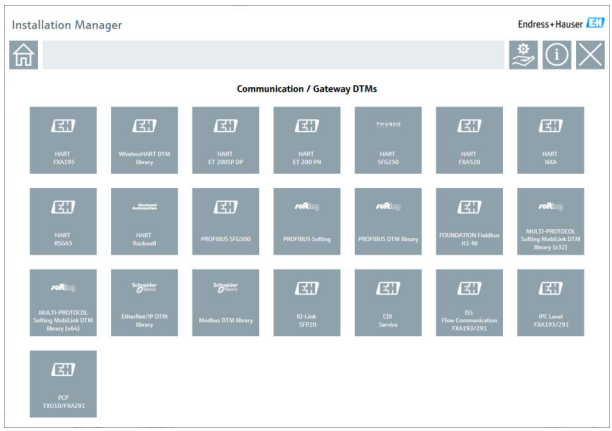
DTM library

► Click **DTM library**.
  ↳ All available DTMs are displayed.



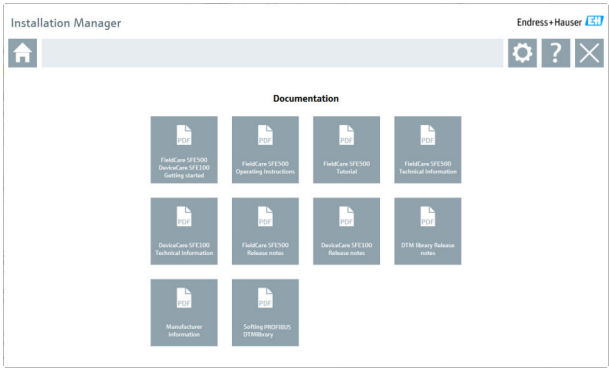
Communication / gateway DTMs

► Click **Communication / gateway DTMs**.
  ↳ All available communication / gateway DTMs are displayed.



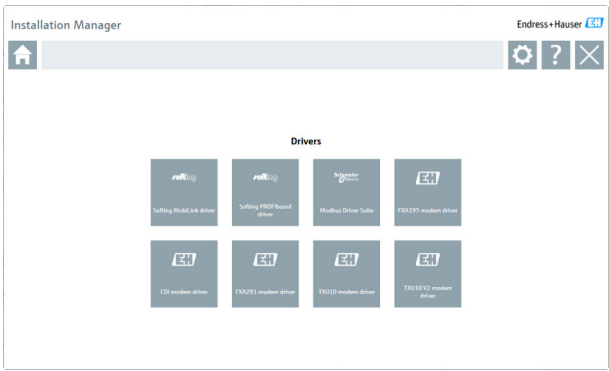
Documentation

- Click **Documentation**.
  - ↳ All documents are displayed as PDFs.



Drivers

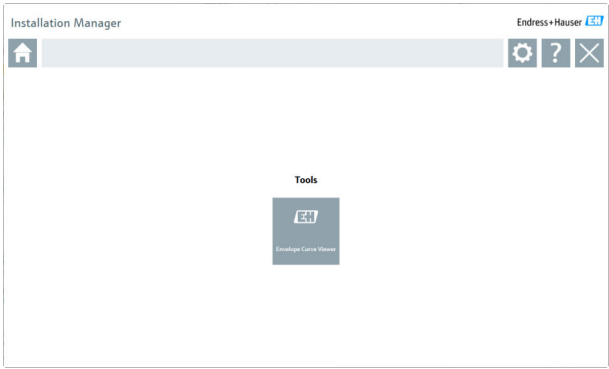
- Click **Drivers**.
  - ↳ All available drivers are displayed.



Tools

► Click **Tools**.

↳ The installation process for the Envelope Curve Viewer (Echo Curve Viewer) starts.



4.3 Updating the software

Endress+Hauser offers an update contract for FieldCare.

Contact your Endress+Hauser sales partner for further information.

Software update service

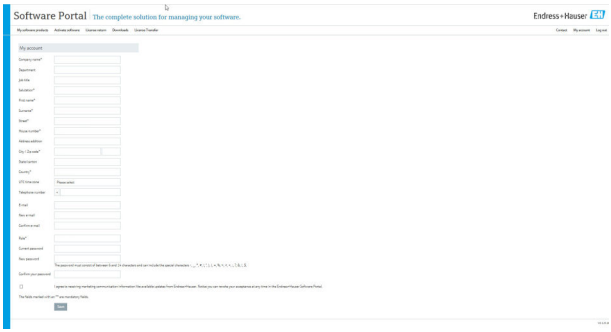
The inclusive maintenance period starts with the creation of the license and ends automatically after one year (expiry date). Regardless of when the software update service is purchased, any additional software update service purchased will continue without interruption from the last expiry date. If purchased after the expiry date, the new maintenance period will first cover the gap in service created between the expiry date and the creation of the purchased software update service.

It should also be noted that software updates can also be activated at a later point in time, provided that the software release was issued within a valid, active maintenance period.

Subscribing to product information

1. Enter https://software-products.endress.com in the web browser.
2. Log onto the Software Portal.

3. In the Software Portal, click **My account**.
   ↳ The "My account" dialog box opens.



4. Scroll down, select **I agree to receiving marketing communication information like available updates from Endress+Hauser** and click **Save**.
   ↳ You have subscribed to product information.

4.4 Updating the device catalog

The FieldCare device catalog must be updated following the installation of new DTMs or FDI Packages.

Prerequisites:
- FieldCare has been installed
- The software ID has been entered and the software has been activated
- The DTMs or FDI Packages have been installed

1. In FieldCare, click **Device catalog** and **Update**.
   ↳ The "Update device catalog" dialog box opens. The window on the left shows the DTMs or FDI Packages that are not included in the device catalog. The window on the right shows the DTMs or FDI Packages that are in the device catalog.
2. Click **Update**.
   ↳ The installed device drivers are updated.
3. Using the right mouse button, click the left window and select **Add all to DTM catalog**.
   ↳ The DTMs, iDTMs and FDI Packages are added to the device catalog.
4. Click **OK**.
   ↳ The changes are accepted and the dialog box closes.

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