FieldCare, DeviceCare Getting Started





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

Product version	Document	Changes/comments
 FieldCare: 2.18.xx DeviceCare: 1.07.xx 	KA01303S/04/ EN/10.23-00	 New FieldCare product version Windows 11 Support Microsoft SQL Server 2022 Express Update FDI Package support, Endress+Hauser and third-party manufacturer PROFINET CommDTM updated CDI CommDTM updated Flow verification DTM updated Security update of components Security update of components Security manual SD03193S Catalog update, B & R scanning and IO-Link improved W@M functionality removed as W@M Portal will shut down on 31.12.2023.
 FieldCare: 2.19.xx DeviceCare: 1.08.xx 	KA01303S/04/ EN/11.24-00	 FXA291 communication driver updated V2.12.36.4 Softing PROFIdtm updated V2.24.00 Flow verification DTM updated V2.02.00 PROFINET CommDTM updated V1.01.00 Bug fixes

2 About this document

2.1 Document function

The Brief Operating Instructions contain all the essential information from incoming acceptance to initial commissioning.

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

2.2 Symbols used

Symbol	Meaning
A	Open the start page of the Installation Manager.
¢	Open the language setting.

Symbol	Meaning
?	Additional information about the software.
\times	Close the application.
<	Jump back to the last page opened.
Ř	Information about FieldCare, modem, Fieldgate, Field Xpert.
	Open the keyboard.
ス と ス	Full screen.
ZK ZK	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

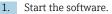
Activating the software permanently with Internet connectivity

Prerequisites:

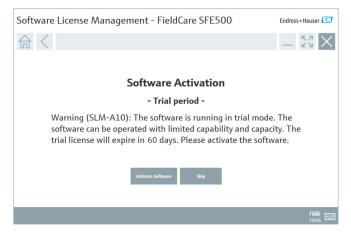
The software ID is available



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.



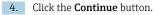
└ The **Software activation** window is displayed:



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



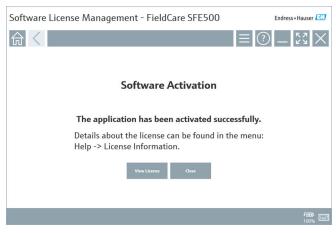
- 3. Enter the software ID.
 - └ A symbol confirms the correct software ID has been entered.



∟.

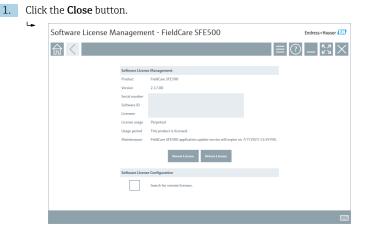
() ()				_	К.Я. 2 Ч
	te the software l in your creden				
	I have forgotten my passwo Activate	rd Create Account	Cancel		

- 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:



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

- 2. Click the X (\times) 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.

1 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:

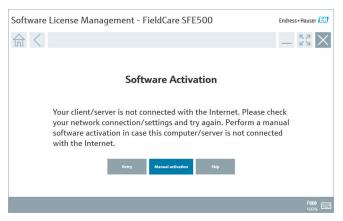
- A portable storage device, e.g. a USB stick
- A second computer with Internet access

Overview of the manual activation process

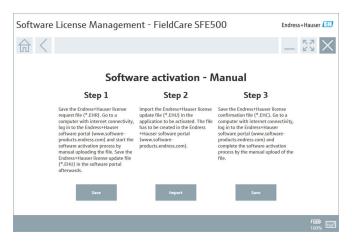
Computer with FieldCare, but no Internet access	USB stick	Computer with Internet access
"Software activation - Manual" window		In the Endress+Hauser software portal
Step 1		
Action: Save license request file (*.EHR) on USB stick.	=>	1. Activation request
		Action: Upload license request file (*.EHR) 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.



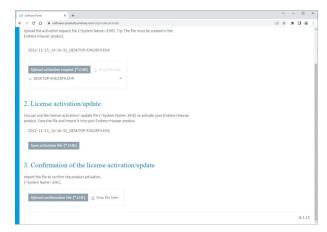
- 3. Click the Save button under Step 1.
 - ← The Windows dialog **Save as...** opens.
- 4. Save the license request file (*.EHR) on a USB stick.
- 5. Take the USB stick to a computer with Internet access.
- 6. On this computer with Internet access, go to the Endress+Hauser software portal: https://software-products.endress.com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

17 Software Foral X +	v - D)
- > C 🙆 🛔 software-products.endress.com/ui/private/activate	8 x * 1 4
Software Portal The complete solution for managing your product licenses.	Endress+Hauser 🖽
Home My Licenses Activation/Update License return Download License Assignment Contact My account	
1. Activation/update request Upload the activition request frie (>5ystem Name <ehr). be="" created="" file="" in="" must="" the="" the<br="" tip:="">Endews+Hauer model.</ehr).>	
Uplead activation request (*.2143)	
2. License activation/update You can use the license-activation/-update file (>5ystem Name <ehu) activate="" endress+hauser<="" td="" to="" your=""><td></td></ehu)>	
product. Save the file and import if into your Endness+Hauser product.	
3. Confirmation of the license activation/update	
Import the file to confirm the product activation. (>System Name<.EHC).	
Upload confirmation file (*.EHC) 👲 Drop file here	
	8.1.1

- 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.
- **18.** Save the license confirmation file (*.EHC) on the USB stick.
- 19. Click the X (\times) 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.

← → C O is software-products.endress.com/ui/		LÉ 1
Upload the activation request file (>System Na Endress+Hauser product.	ame<.EHR). Tip: The file must be created in the	
2022-11-15_14-16-32_DE5KTOP-R3K28	SFHLEHU	
Upload activation request (*.EHR)		
DESKTOP-R3K28FH.EHR	×	
2. License activation/update	te	
You can use the license-activation/-undate file	e (>System Name<.EHU) to activate your Endress+Hauser	
product. Save the file and import it into your Er	Endress+Hauser product.	
	Endress+Hauser product.	
product. Save the file and import it into your Er	Endress+Hauser product.	
product. Save the file and import it into your Er 2022-11-15_14-16-32_DESKTOP-R3K28F	Endress+Hauser product.	
product. Save the file and import it into your Er 2022-11-15_14-16-32_DESKTOP-R3K28F	Indress-Hauser product. InfrASHU	
product. Save the file and import it into your En 2022-11-35_14-16-32_DESKTOP-R3K280 Save activation file (*1100) 3. Confirmation of the licer Import the file to confirm the product activatio	ndees-нашее робыт. янклац mse activation/update	
product. Save the file and import it into your Ex 2022-11-15_14-16-32_DESKTOP-R3K280 Save activation file (*.1380) 3. Confirmation of the licer	ndees-нашее робыт. янклац mse activation/update	
product. Save the file and import it into your E 2022-11-15_14-16-12_DESKTOP-RI3C28I Save activation file (*1180) 3. Confirmation of the licer Import the file to confirm the product activatio (25)tem hame(_3HC).	ndees-нашее робыт. янклац mse activation/update	
product. Save the file and import it into your E 2022:11:35_14:16:32_0ESKTOP.4334280 Save activation file (*1180) 3. Confirmation of the licer import the file to confirm the product activatio (?System NameC_BHC).	Independent. PRLDNU nse activation/update en.	

- 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:

Software License Managem	Endress+Hauser	
命く		≡?_5××
Software Lice	ise Management	
Product	FieldCare SFE500	
Version	2.17.00	
Serial number		
Software ID		
Licensee		
License usage	Perpetual	
Usage period	This product is licensed.	
Maintenance	FieldCare SFE500 application update service will expire on 7/7/2023	11:59 PM.
	Renew License Return License	
Software Lice	ise Configuration	
	Search for remote licenses.	

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

Software License Management - FieldCare SFE500	Endress+Hauser 🖽
	#100%



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

Software License Management - FieldCare SFE500	Endress+Hauser 🔠
	- ² 2 27
Software Activation	
The application has been activated successfully.	
Details about the license can be found in the menu: Help -> License Information.	
View License Close	
	# 00%

If you do not yet have a user account for the Endress+Hauser software 4. 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:

Software License Manageme	Endress+Hauser 🖾	
命く		≡ ? _ % ×
Software Licen	se Management	
Product	FieldCare SFE500	
Version	2.17.00	
Serial number		
Software ID		
Licensee		
License usage	Perpetual	
Usage period	This product is licensed.	
Maintenance	FieldCare SFE500 application update service will expire on 7/7/2023 11:59 PM.	
	Renew License Return License	
Software Licen	se Configuration	
	Search for remote licenses.	

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

Software License Management - FieldCare SFE500	Endress+Hauser
∃	? _ Ľ X ×
To return the license you need access to the Software Portal. Please fill in your credentials or register to get a new account. E mill address Password I have forgetten my paravered Utense License Crede Access	
	/ III 100% III

- 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

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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

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

In 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. A Microsoft SQL Server 2022 Express is installed with clean installations of FieldCare versions from 2.18.

A clean installation of FieldCare 2.18 is recommended for the Windows 11 operating system. With FieldCare 2.18, a Microsoft SQL Server 2022 Express, which is an essential requirement for Windows 11, is automatically installed.

Installed operating system	Installed SQL Server	FieldCare database ¹⁾	FieldCare	Procedure
Windows 10	No SQL Server installed	No database installed	Not installed	 Install FieldCare 2.18.xx incl. SQL Server 2022. FieldCare database is clean installed.
Windows 10	SQL Server 2014 SQL Server 2016 SQL Server 2019 or SQL Server 2022	No database installed	Not installed	 Perform a clean install of FieldCare 2.18.xx. Use existing SQL Server. FieldCare database is clean installed.

Installation and update scenarios supported by version 2.18.xx:

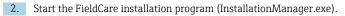
Installed operating system	Installed SQL Server	FieldCare database ¹⁾	FieldCare	Procedure
Windows 10	SQL Server 2014	Database installed	Not installed or older version	 Perform a clean install of FieldCare 2.18.xx. Use existing SQL Server. Existing FieldCare database is used.
Windows 11	No SQL Server installed	No database installed	Not installed	 Install FieldCare 2.18.xx incl. SQL Server 2022. FieldCare database is clean installed.

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.

4.2 Software installation

1. Insert the FieldCare USB stick into a USB port and use the Windows file manager to switch to the root directory.



Installation Manager				Endress+Hauser
命				🍣 (i)
	ß	(EI)	EI)	
	FieldCare SFE500 License key required	DeviceCare SFE100 Freeware, activation required	DTM library	
	(EI)			
	FDI Package Library	More		

- Options on the Installation Manager start page: FieldCare SFE500 installation →

 19

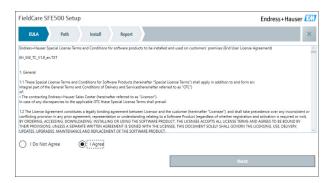
 - DeviceCare SFE100 installation →
 ⁽¹⁾ 22
 - DTM library installation →
 ⁽¹⁾
 ⁽²⁾
 ⁽²⁾
 - FDI Package library installation →
 ¹ 26
 - More $\rightarrow \square 26$

4

4.2.1 Installing FieldCare SFE500

1. Click FieldCare SFE500 on the Installation Manager start page.

╘╺ The "EULA" tab opens.



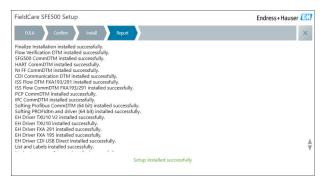
- 2. Select **I agree** to accept the license agreement and click **Next**.
 - ← The "Path" tab opens.

FieldCare SFE500 Setup	Endress+Hauser 🖽
EULA Path Install Report	X
Installation path	
C:\Program Files (x86)\Endress+Hauser\FieldCare SFE500	
Create shortcut on desktop?	
Back	Next

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

FieldCare SFE500 Setup	Endress+Hauser 🖽
EULA Confirm Update Report	×
Updating	
	Overall Progress
-	Frame

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.

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4.2.2 Installing DeviceCare SFE100

1. On the Installation Manager start page, click **DeviceCare SFE100**.

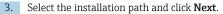
← The "EULA" tab opens.

eviceCare SFE100 Setup				Endress+Hau	iser 🖪		
EULA	Path	Install	Report				×
	l part of the Gen	eral Terms an	d Conditions of De	livery and Services (herein		shall apply in addition to and the contracting Endress+Hau	
(regard BY ACC	all take preceden lless of whether r ESSING, DOWNI	ce over any is egistration an OADING, INS	consistent or conf d activation is requ FALLING OR USING	icting provision in any pri ired or not). THE SOFTWARE, THE LIG	ior agreement, representation	ud/or end user (hereinafter "Li or understanding relating to E TERMS AND AGREES TO BI CUMENT SOLELY SHALL GOV.	software BOUND
1.3					MENT OF THE SOFTWARE. des of the Software that Lice	nsor supplies, unless Licensor	provides
1.4	The Special Li	ense Terms o	io not apply to lice	nsing of the following so	ftware products: Software as	a Service (SaaS), firmware (e	mbedded
) I Do Not A	igree (I Agree					
					٩	lext	
					Þ	lext	

2. Select **I agree** to accept the license agreement and click **Next**.

← The "Path" tab opens.

DeviceCare SFE100 Setup	Endress+Hauser 🖾
EULA Path Install Report	×
Installation path	
(C\Program Files (x86)\Endress+Hauser	35
Create shortcut on desktop?	
Back	Next



└ The "Install" tab opens and **DeviceCare** starts to install.

DeviceCare SFE100 Setup	Endress+Hauser 🖽
EULA Confirm Install Report	×
Installing	
Overall Progress	
License Validator (64bit)	

Following installation, the "Report" tab opens.

DeviceCare SFE100 Setup	Endress+Hauser 🔀
EULA Confirm Install Report	×
Release Notes installed successfully. DeviceCare SFE100 installed successfully.	
Setup	installed successfully

4. Close the dialog box.

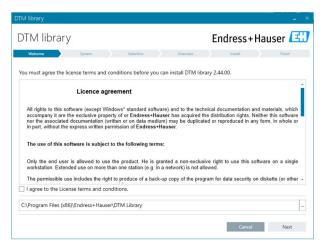
4.2.3 DTM library



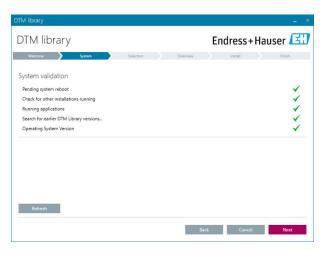
To be able to access the devices, the required DTMs and DTM libraries must be selected and installed.

1. Click **DTM library** on the Installation Manager start page.

└ The "Welcome" tab opens.



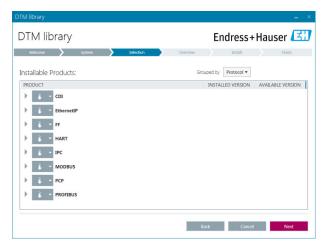
- 2. Accept the license conditions and click Next.
 - └ The "System" tab opens.





3. Click Next.

∟. The "Selection" tab opens.



Select the products that need to be installed and click Next. 4.

┕► The "Overview" tab opens.

DTM library				Endre	ss+l	laus	er 🖪
Welcome System	Selection	>	Overview	Inst	ll		Finish
Installation Overview:							
ollowing products are subject to (Un)Install/Update:							
PRODUCT				INSTALL	UPDATE	REMOVE	SIZE [MB]
Ecograph T / RSG35 / CDI / FW 2.01.zz					~		0.0
EngyCal / RH33 / CDI / FW 1.04.zz					\checkmark		0.0
EngyCal / RS33 / CDI / FW 1.04.zz					~		0.0
Levelflex / FMP 5x / HART / FW 1.01.zz / Dev.Rev. 2					~		-1.6
Levelflex / FMP 5x / HART / FW 1.02.zz / Dev.Rev. 3					~		-1.3
Levelflex / FMP 5x / HART / FW 1.03.zz / Dev.Rev. 4					~		4.2
Levelflex / FMP 5x / PA / FW 1.00.zz / Dev.Rev. 1					1		-2.3
					.1		0.6
Total				12	21	0	422.7
USED DRIVE	REQUI	RED SPAC	E [MB]		FREE SP	ACE [MB]	
CA		422.7			62,7	30.9	

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

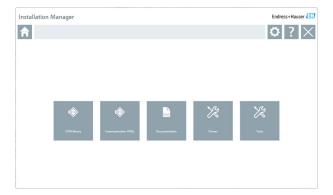
In order to access the devices with FDI Packages as device drivers, you must first install the necessary FDI Packages or FDI Package libraries.

1. Click FDI Package library on the Installation Manager start page.

2. Follow the instructions on installation.

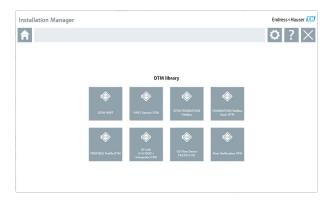
4.2.5 More

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



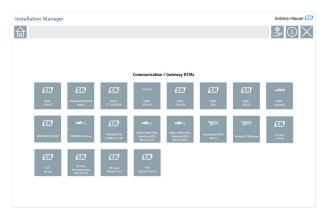
DTM library

- ► Click DTM library.
 - └ All available DTMs are displayed.



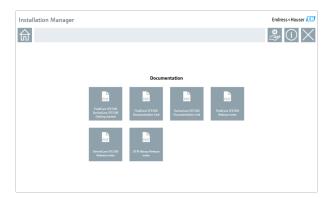
Communication/Gateway DTMs

- Click Communication/Gateway DTMs.
 - All available communication/gateway DTMs are displayed.



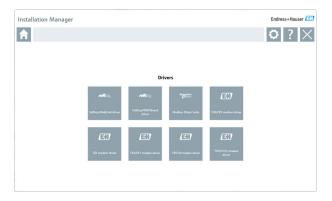
Documentation

- ► Click Documentation.
 - └ All documents are displayed as PDFs.



Drivers

- Click Drivers.
 - ← All available drivers are displayed.



Tools

- Click Tools.
 - ← All available tools are displayed.



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.

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- 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.



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