



Kepware is the world leader in communication software for automation.

We offer expertise in both OPC and embedded device communications, and our OPC software products are known worldwide for their quality, reliability and ease of use. Kepware's unique driver architecture combines with industry and 3rd party vendor standards to ensure Kepware's ability to deliver state of the art and ideal-fit solutions for industry leading automation applications. Our mission is to become the de facto standard for 3rd party connectivity.

Kepware Installation Guide

Thank you for choosing Kepware Technologies. Our focus on industrial automation software technology allows us to provide a growing range of products for every major industrial protocol. We develop communication drivers, automation controllers, I/O and field devices. Operating system support includes Microsoft Windows Desktop, Server and Embedded (Windows CE and Windows NT/XP Embedded). Today, Kepware provides over 130 communication protocols. Through the efforts of our direct sales, distribution and embedded partners, Kepware is the leading provider of communications with annual shipments exceeding 100,000 units. For detailed product descriptions, please visit our website at www.kepware.com.

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Kepware Technologies Products

Installing from the Kepware CD

Kepware product installation files may be installed directly from a Kepware product CD-ROM or from the Kepware website.

01. Installing from the Kepware CD

Insert the "Kepware Product Installations & Information CD" into the CD drive. The CD should automatically run the installation; if it does not, browse to the CD drive using Windows Explorer and double-click on "Setup.exe".

02. Go to the Products Page

Click Product Installations to open the Products page.

03. Choose a Product

Select the desired product and then click Install.

04. Follow Product Installation

Skip ahead in this booklet to the section regarding the software product's specific installation instructions. For more information, refer to the Table of Contents.

Installing from the Kepware Website

01. Installing from the Kepware Website

Navigate your browser to www.kepware.com and then hover over Home. This will invoke My Kepware and Register.

02. Sign In to My Kepware (or Register)

If you have already created a **My Kepware** account, click on **Login**. If not, click on **Sign Up** and complete the registration page. Afterwards, you will receive an email: to verify your Kepware registration, click on the link provided by Kepware.

03. Go to the Products Page

Once verified, you will be able to sign into your **My Kepware** account, from which you may download product installation files. To start, click **Products**.

04. Choose a Product

Browse through the products. When you are ready, click **Free Download** for the product of interest.

05. Save the Installation File(s) to Your Computer

The **File Download Security Warning** dialog will be displayed. Click **Save** and then browse to the folder in which you want to save the installation file.

06. Follow Product Installation

Skip ahead in this booklet to the section regarding the software product's specific installation instructions. For more information, refer to the Table of Contents.

Installing ClientAce

With ClientAce's powerful drag-and-drop controls and full API, you can OPC client-enable your .NET applications quickly.

Note: Microsoft's Visual Studio .NET 2003/2005/2008 must be installed before installing ClientAce.

Please run the Microsoft Visual Studio .NET 2003/2005/2008 setup at this point if it is not already installed. ClientAce will not install on Microsoft Visual Studio Express Editions.

01. Installation Welcome

In the Installation Welcome screen, click **Next** to continue.

02. License Agreement

Read the License Agreement and then click "I accept the terms of this license agreement" to accept the terms and continue. If you do not accept the terms and wish to cancel the installation, click "I do not accept the terms of this license agreement".

03. Choose Destination Folder

You may change the default directory at this point or click **Next** to accept the default and continue

04. Select Features

Select the desired features and then click **Next** to continue.

05. Select Program Folder

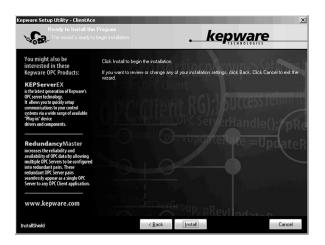
The installation creates a Start Menu directory named **Kepware Products** by default, as well as a **ClientAce** sub-directory. You may change the default directory at this point or click **Next** to accept the default and continue.

06. Complete the Installation

Click Next.

07. Finish the Setup

Click Finish.



Licensing and Unlocking ClientAce

The following process is required for licensing and unlocking ClientAce.

01. Invoke the 'License ClientAce' Option

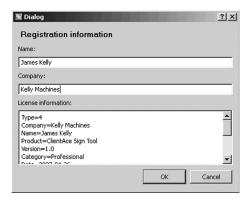
From the Windows desktop, click **Start | Programs | Kepware Products**. Next, select **ClientAce | License ClientAce**.

02. Acquire License

In the Kepware ClientAce License dialog, click Acquire License.

03. Enter Registration Information

In the Registration Information dialog, complete the Name and Company fields. The License Information field will be populated with the licensing information needed by Kepware Technologies.



04. Send Message to Kepware Technologies

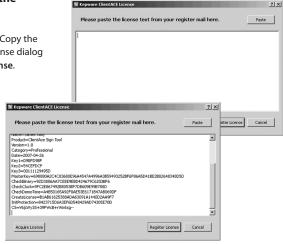
An email message window from your email client application will be displayed. Click **Send** to send the message to Kepware Technologies.

05. Post the Licensing Code into the ClientAce Licensing dialog

Kepware Technologies will reply and include the product's licensing code. Copy the code into the Kepware ClientAce License dialog window, and then click **Register License**.

06. Confirmation

ClientAce has been installed sucessfully, and can now be used to sign custom client applications.



Installing **KEPServerEX**

KEPServerEX has the widest range of available plug-in device drivers and components for the industrial market. With over 130 reliable drivers that support thousands of model types, KEPServerEX allows you to truly maximize the promise of OPC.

@KEPServerEX 5 Setup

01. Start the install

Double-click on the icon and select **Run** or **Open** to start the install. If an active content warning is displayed, click "Yes" to continue.

02. Installation Welcome

In the Installation Welcome dialog, click **Next** to continue.

03. License Agreement

Read the License Agreement and then click "I accept the terms of this license agree-



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ment" to accept the terms and continue. If you do not accept the terms and wish to cancel the installation, click "I do not accept the terms of this license agreement".

04. KEPServerEX V4.x Detected

Setup can detect when a legacy version server is installed. To keep and run both versions, select **Side by Side**. To remove the legacy server and direct all connections requests for it to the new server, select **Remove and Redirect**.

05. Choose Destination Folder

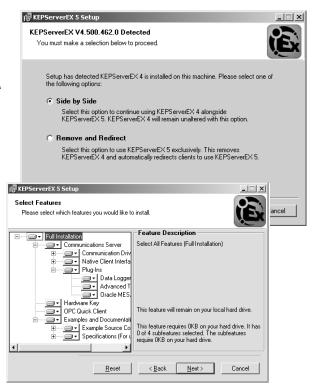
By default, KEPServerEX will be installed into the following directory:

C:\Program Files\Kepware\ KEPServerEX 5

You may change the default directory at this point or click **Next** to accept the default and continue.

06. Select Program Folder

The installation creates a Start Menu directory called **Kepware** by default, as well as a **KEPServerEX 5** subdirectory. You may change the default directory at this time, or click **Next** to accept the default and continue.



07. Select Installed Feature Set

Expand the driver tree in order to view and select the drivers you wish to install. When a main component is selected, all of the sub-components beneath will also be installed. Leave **Example Source Code** checked in order to install sample source code and specifications.

For **Server-Level Components**, expand the **Plug-in** tree and select the components you wish to install.

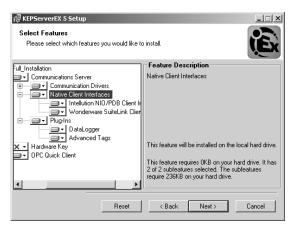
For **Custom Client Interfaces**, expand the **Native Client Interfaces** tree and select the interfaces that you will need supported.

08. Ready to Install the Application

Click Next to start the install. To modify selections, click Back.

09. Complete the Setup

Once the installation is completed, click Finish to complete the setup. A Kepware Readme.txt document will be displayed. Read the document and then click File | Exit to close the window.



Activating a Software License **KEPServerEX**

Once activated, a software license may be transferred to another machine.

Note: Software licenses are recommended for users who require the use of Terminial Services.

01. Open License Utility

Select Manage Software Licenses and then click Next

02. Select "Manage software license activation between this PC and the issuer."

Click Next to continue.

03. Enter the Activation ID

In **Create Activation Request File**, enter the **Activation ID**, which is assigned by

Kepware with the purchased product. Then, click Save to File....

04. Save the Request File

The License Utility will then display a file-browse dialog, allowing you to save the generated request file, "activation_request.txt." Save the file, making note of its location as it will be sent to Kepware in the next step.



05. Launch License Management Tools

In an internet browser, navigate to www.kepware.com/mykepware. This will bring you to the My Kepware Portal. Returning users will be prompted to enter login information, whereas first users must create a My Kepware Account to continue. Once logged in, select Product Registration and Activation under the License Management Tools section for the version of the product being installed. Next, click Browse and then select the downloaded activation request file.

06. Save the Activation Response File

Next, click **Generate Activation Response File**. You'll receive an activation response file called "response.txt" from Kepware. Save this file to the Host PC.

07. Process the Activation Response File

Return to the Manage Software License Activation dialog in the License Utility. Next, click Load From File.... then select the downloaded Activation Response File. The document is then processed. If successful, the View Page will be displayed.



Transferring a Software License **KEPServerEX**

The Transfer Process allows users to either store the license in License Management Tools or move the license from one machine to another.

01. Open License Utility

Select Manage Software Licenses and then click Next.

02. Select "Transfer a software license by returning the license to the issuer."

03. Select the Product to be Transferred

Under Create Transfer Request File, select the product that will be transferred. This will update the Products Affected by Current Selection list box with the features contained within the software license.



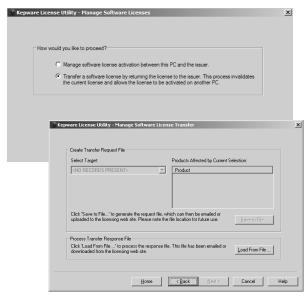
04. Deactivate the License

Click Save to File... to deactivate the license on the machine.

Note: This means that the license rights will no longer be respected by the installed software. If a request file is not given to Kepware, users will be unable to use the license. The software will return to running in 2 hour demo mode.

05. Save Generated Request File

The License Utility will then display a file-browse dialog, allowing you to save the generated request file, "transfer_request.txt." Make note of its location, as it will be sent to Kepware in the next step.



06. Launch License Management Tools

In an internet browser, navigate to www.kepware.com/mykepware. This will bring you to the My Kepware Portal. Once logged in, select Activation Transfer Utility under License Management Tools for the version of the product being used. Next, click Browse and then select the downloaded activation request file..

Note: The license is now stored in the online account. For more information on moving the license to another PC, continue with the instructions below.

07. Save the Transfer Response File

Next, click Generate Transfer Response File. You'll receive an activation response file called "response.txt" from Kepware. Save this file to the Host PC.

08. Process the Transfer Response File

Return to the Manage Software License Transfer dialog in the License Utility. Next, click Load From File.... then select the downloaded Transfer Response File. The document is then processed. If successful, the View Page will be displayed.

Note 1: The license information for the products being transferred will not be present in the list. **Note 2:** Users may now activate the license on a second machine.

Managing Hardware Key Certificates **KEPServerEX**

A Hardware Key Certificate is a digitally-signed file generated by Kepware that contains a unique Hardware Key ID (as well as a list of activated products). Although hardware key certificates can be imported to many hosts, the corresponding physical hardware key can only be attached to one machine at a time.

Note: If a hardware license is being used, the subscription associated with that product is bound to the hardware certificate. It is mobile when the document is exported/imported.

01. Open License Utility

Select Manage Hardware Key Certificates and then click Next.

02. Registering the Hardware Key Certificate File

- Obtain the hardware key and corresponding hardware key certificate from Kepware, and then click Load from file....
- Browse to the hardware key certificate file and then click OK. The file will have a unique name, such as "MyHrdKeyCert.lic."

The certificate is then processed by the License Utility. If successful, the **View Page** will be displayed.



04. Using the Hardware Key Certificate File on Multiple Machines

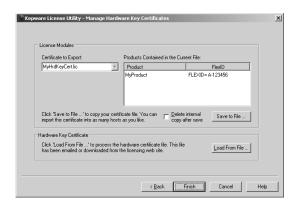
Before the hardware key may be used on another machine, a copy of the hardware key certificate file must be located. It does not need to be returned to Kepware.

- To export the hardware key certificate file to a different machine, select it from the Certificate to Export drop-down menu. This will update the list of products contained in the current file.
- 2) Next, click Save to File... and then select where to save the hardware key certificate file. Users should back-up this file in a safe and accessible location.

Note: The hardware key certificate is now ready to be imported into a second machine.

05. Deleting the Internal Copy of the Hardware Key Certificate File

If planning to use a different hardware key, users may find that removing the existing hardware key certificates helps to avoid confusion. To do so, select **Delete internal copy after save** in the **Manage Hardware Key Certificates** dialog.



Installing LinkMaster

LinkMaster has the capabilities of both server and client applications. It can access, collect, organize and link data from other OPC servers and then offer that data to OPC/DDE clients.

01. Installation Welcome

In the Installation Welcome dialog box, click Next to continue.

02. License Agreement

Read the License Agreement and then click "I accept the terms of this license agreement" to accept the terms and continue. If you do not accept the terms and wish to cancel the installation, click "I do not accept the terms of this license agreement".

03. Select Features

Select the desired features and then click Next to continue.

04. Choose Destination Folder - LinkMaster

By default, LinkMaster will be installed into the following directory:

C:\Program Files\LinkMaster

You may change the default directory now or click **Next** to accept the default directory and continue.

05. Choose Destination Folder - EventViewer

By default, EventViewer will be installed into the following directory:

C:\Program Files\EventViewer

You may change the default directory now or click **Next** to accept the default directory and continue

06. Select Program Folder - LinkMaster

The installation creates a Start Menu directory named **Kepware Products** by default, as well as a **LinkMaster** sub-directory. You may change these directory locations now or click **Next** to accept the default locations and continue.

07. Select Program Folder - EventViewer

The installation creates a Start Menu directory named **Kepware Products** by default, as well as an **EventViewer** sub-directory. You may change the default directory at this point or click **Next** to accept the default and continue.

08. Review Install Settings

Verify the selected install components and settings and then click **Next** to start the install. To modify selections, click **Back**.

09. Complete the Setup

Once the installation is complete, click Finish to complete the setup. A Kepware support document will be displayed containing information about using DCOM on the Windows XP operating system with Service Pack 2. Read the document and then click File | Exit to close the window.



Licensing and Unlocking LinkMaster

The following process is required for licensing and unlocking LinkMaster.

01. Start LinkMaster

If LinkMaster is not already running, start it now.

02. Access Help Menu

From the main menu, select **Help | Unlock Application**.

03. Enter License

Enter the license for the purchased item. This license number (21 digits or longer) can be found on the sticker inside the "Product Installations & Information" CD case.

Click OK to continue.

Note: The "Keypad" button is provided for PCs without keyboards.

04. Unlock License

Once the product license number has been entered, you will be running in the 10 day installation grace period. In this time, you must visit www.kepware.com/mykepware or contact a qualified representative to unlock the license for full-time use.

05. Supply Unlock Information

From the main menu, select **Help | Unlock a License...** to display the unlock information (License Number and Computer ID).

Pick **one** of the following methods to supply the unlock information and receive your password from Kepware Technologies. Include the product owner's contact information. For example, if you are unlocking the items for a client, we will need the client's contact information.

1) Online: www.kepware.com/mykepware

2) Call: +1 (207) 775 1660 x 211 **3) Fax:** +1 (207) 775 1799

4) Email: password@kepware.com

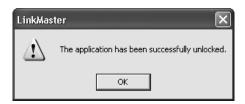
06. Enter Password

Enter the password received from Kepware, and then click **OK** to continue.



07. Item Unlocked

The item is now unlocked for unrestricted full-time use.



08. Restart LinkMaster

LinkMaster must be restarted in order for the license and unlock process to take full effect. From the main menu, select **File | Exit.**

Transferring a Product License:

LinkMaster

The following process is required for transferring a LinkMaster product license.

01. Start LinkMaster

If LinkMaster is not already running, start it now. **Note:** At this time, record all license numbers.

02. Access Help Menu - Target System

From the main menu, select Help | Transfer a License.

03. Read the Instructions

Read the instructions in the License Transfer Wizard. Then, click Next to continue.

04. License Agreement

Read the License Agreement and then click "I accept the terms of this license agreement" to accept the terms and continue. If you do not accept the terms and wish to cancel the installation, click "I do not accept the terms of this license agreement".

05. Start the Target Machine

Start the Target Machine, which is the machine to which the license will be transferred.



06. Select Removable Media

Select the removable media drive for preparation and make sure that the media is loaded. Then click **Prepare**. The media will now be prepared for license transfer. Click **Next** to continue.

07. Select the Source System

The media must now be removed from the Target System and inserted into the Source System. Be sure that all the steps described can be completed in a timely fashion before continuing with the license transfer process.

08. Access Help Menu - Source System

From the main menu, select Help | Transfer a License.

09. Select Source System

Select the **Source System** and then select a licensed driver or plug-in from the drop-down list. Click **Next** to continue.

10. Read the Instructions

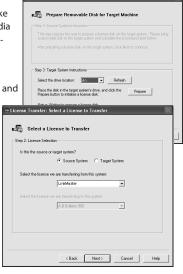
Read the instructions and then click Next.

11. Verify Install Components

Be sure that the prepared media from the Target Machine is loaded into the Source Machine. Select the appropriate drive and then click **Transfer**. Click **Next** to continue.

12. Remove Media - Source System

Read the instructions and then remove the media from the Source System.



License Transfer: Prepare Removable Disk for Target Machine

13. Insert Media - Target System

Insert the media from the Source System back into the Target System. Click Next to continue.

14. Transfer the License

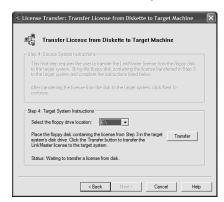
Select the removable media drive from the drop-down list and then click Transfer.

15. Success!

The license has been successfully transferred from the Source System to the Target System. Click **Next** to continue.

16. Transfer Complete

Read the Transfer Process summary and then click Finish to exit.



Redundancy Master

RedundancyMaster increases industrial data's reliability and availability by allowing multiple OPC Servers to be configured into redundant pairs. These pairs will then appear as a single OPC Server to any OPC Client.

01. Installation Welcome

In the Installation Welcome dialog box, click Next to continue.

02. License Agreement

Read the License Agreement and then click "I accept the terms of this license agreement" to accept the terms and continue. If you do not accept the terms and wish to cancel the installation, click "I do not accept the terms of this license agreement".

03. Choose Destination Folder - RedundancyMaster

By default, RedundancyMaster will be installed into the following directory:

C:\Program Files\RedundancyMaster.



You may change the default directory now or click **Next** to accept the default directory and continue

04. Select Features to Install

Click Next to continue.

05. Select Program Folder

The installation creates a Start Menu directory named **Kepware Products** by default, as well as a **RedundancyMaster** sub-directory. You may change the default directory at this point or click **Next** to accept the default and continue.

06. Complete the Setup

Once the installation is completed, click **Finish** to complete the setup.



Licensing and Unlocking Redundancy Master

The following process is required for licensing and unlocking RedundancyMaster.

01. Start RedundancyMaster

If RedundancyMaster is not already running, start it now.

02. Access Help Menu

From the main menu, select Help | Purchase a License.

03. Enter License

Enter the license for the purchased item. This license number (21 digits or longer) can be found on the sticker inside the "Product Installations & Information" CD case. Then, click **OK** to continue.

Note: The "Keypad" button is provided for PCs without keyboards.

04. Item Licensed

Now that the item is licensed, it must be unlocked for unlimited use. Click "Yes" to unlock item now or "No" to unlock the item later.

Once the product license number has been entered, you will be running in the 10 day installation grace period. In this time, you must visit www.kepware.com/mykepware or contact a qualified representative to unlock the license for full-time use.

05. Supply Unlock Information

From the main menu, select Help | Unlock a License... to display the unlock information (License Number and Computer ID). Pick one of the following methods to supply the unlock information and receive your password from Kepware Technologies. Include the product owner's contact information. For example, if you are



1) Online: www.kepware.com/mykepware

2) Call: +1 (207) 775 1660 x 211
3) Fax: +1 (207) 775 1799
4) Email: password@kepware.com

06. Enter Password

Enter the password received from Kepware, and then click **OK** to continue.

unlocking the items for a client, we will need the client's contact information.

07. Item Unlocked

The item is now unlocked for unrestricted full-time use.

08. Restart RedundancyMaster

RedundancyMaster must now be stopped and restarted for the license and unlock process to take effect. From the main menu, select **File | Exit**.



Transferring a Product License:

RedundancyMaster

The following process is required for transferring a RedundancyMaster product license.

01. Start RedundancyMaster

If RedundancyMaster is not already running, start it now. **Note:** At this time, record all license numbers.

02. Access Help Menu - Target System

From the main menu, select Help | Transfer a License.

03. Read the Instructions

Read the instructions on the License Transfer Wizard. Then, click Next to continue.

04. License Agreement

Read the License Agreement and then click "I accept the terms of this license agreement" to accept the terms and continue. If you do not accept the terms and wish to cancel the installation, click "I do not accept the terms of this license agreement".



05. Start the Target Machine

Start the Target Machine, which is the machine to which the license will be transferred.

06. Select Removable Media

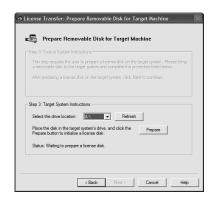
Select the removable media drive for preparation and make sure that the media is loaded. Then, click **Prepare**. The media will now be prepared for license transfer. Then, click **Next** to continue.

07. Select the Source System

The media must now be removed from the Target System and inserted into the Source System. Be sure that all the steps described can be completed in a timely fashion before continuing with the license transfer process.

08. Access Help Menu - Source System

From the main menu, select Help | Transfer a License.



09. Select Source System

Select the Source System and then choose a licensed driver or plug-in from the drop-down list. Then, click **Next** to continue

10. Read the Instructions

Read the instructions and then click Next.

11. Verify Install Components

Be sure that the prepared media from the Target Machine is loaded into the Source Machine. Select the appropriate drive and then click **Transfer**. Once successfully transferred, click **Next** to continue.

12. Remove Media - Source System

Read the instructions and then remove the media from the Source System.



13. Insert Media - Target System

Insert the media from the Source System back into the Target System and then click **Next** to continue.

14. Transfer the License

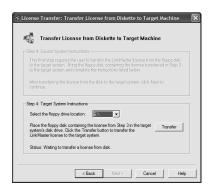
Select the removable media drive from the drop-down list and then click Transfer.

15. Success!

You have successfully transferred your license from the Source System to the Target System. Click **Next** to continue.

16. Transfer Complete

Read the Transfer Process summary and then click Finish to exit.



Accessing

Documentation & 3rd Party Software

Detailed product information may be accessed through the Help Menu.

01. Start the Product

02. Access the Help Menu

The Help File Browser can be accessed from the product's main menu. To do so, select Help | Contents. The Help File Search can be accessed from the product's main menu. To do so, select Help | Search.

Note: These features can be used to search for specific product topics.

03. Help File System

The Help File System contains basic information on device communication setup and supported device addresses, as well as the products' various components and wizards.

04. Driver Documentation

The driver help documentation provides information nessessary to establishing communication with supported devices, as well as detailed descriptions of error codes and their possible causes and solutions. All driver help files include sections on device setup, data types description, address descriptions and error descriptions. To make connectivity easier, most drivers have been designed to use the factory defaults on start up.

05. Online Help Guides

For more information on Kepware products and on connecting 3rd Party Clients, refer to the Knowledge Resources & Self Help section at the Support Center at www.kepware.com.

Kepware Technologies Technical Support

Kepware is introducing a new license service program that delivers both Technical Support and Product Updates as an optional purchase with a product sale. This service program will take the form of an annual service agreement (tracked on a per license basis) and will commence after the initial warranty period.

01. Kepware License Service Program

The Kepware License Service Program includes both support and product updates, which are not available separately. The License Service Program begins following the Warranty expiration and extends for one full year, and includes Phone Support, Email Support and Knowledgebase Access. Product updates for the duration of the support term are included.

02. Support Details

Support includes up to 4 hours of Phone Support per month and unlimited Email Support. Phone Support in excess of 4 hours will require a separate extended support contract, available on a custom basis. Unlimited Email Support and Knowledgebase Access is included with the License Service Program.

03. Update Details

Updates are included for the Licensed product for the duration of the Support term. Updates are for existing license functionality only. Licenses may be upgraded in functionality. After an upgrade, updates will be available as part of the normal warranty policy and new functionality will be supported under an updated License Service Program.

Note: Contact Kepware for expense information.

Accessing

Connectivity Guides

Kepware's Connectivity Guides are also provided in the Installation CD.

01. Connection Details

The Connectivity Guide contains information on how to connect to Kepware server products from 3rd party clients (such as Cimplicity, ePro, Genesis, iFix, Intouch, PI, RSView and WinCC).

02. Accessing Connectivity Guides

To access the Connectivity Guides, click HMI and Client Guides from under the Knowledge Resources & Self Help section at the Support Center at www.kepware.com.

Kepware Technologies End User License Agreement

The software accompanying this license agreement [described as the Software] is the property of Kepware Technologies Inc, and is protected by United States and International Copyright laws and International treaty provisions.

No ownership rights are granted by this Agreement or possession of the Software. Therefore, you must treat the Licensed Software like any other copyrighted material (e.g., a book or musical recording), except that you may make a single copy for backup or archival purposes. Your rights and obligations in its use are described as follows:

01. Single Computer

You may use and display this software on a single computer.

02. Archival Copy

You may make one copy of the software for archival purposes. Alternatively, you may copy the software onto your hard disk and hold the original for archival purposes.

03. Source Code

You may not modify or attempt to reverse engineer the software, or make any attempt to change or even examine the source code of the software.

04. License Transfer

You may transfer the software to another computer using the utilities provided. The software must be used on only a single computer at one time.

05. Distribution

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