COACH

Installation Guide

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COACH 2.0

INSTALLATION GUIDE

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INTRODUCTION

The COACH software program is provided on the CentraLine Software CD-ROM, and must be installed on to the hard drive of the computer in order to run the program.

⚠ CAUTION

Before you install the software, please follow the instructions described under System Requirements to make sure that COACH software will be working properly.

CONTENTS OF THE CD

The CD delivered from the factory is empty and contains only a voucher.
Please request the software and the following documents from the local CentraLine field focus people:

- Installation guide (.pdf)
- User guide previous COACH version (.pdf) in local language
- Product datasheet (.pdf)

The COACH version name and a corresponding voucher number for the licensing process define the right to use this software product.

SYSTEM REQUIREMENTS

Hardware Requirements

PC with the following minimum specification:

- An IBM compatible PC with Pentium 1.5 GHz processor
- 1 GB RAM
- 20 GB free hard disk space
- 2 MB VGA supporting 64k colors at 800 x 600 resolution
- LonWorks Network Interfaces, see “LON Interfaces” section
- Serial port for modem connection
- Pointing Device – Mouse (serial, PS/2, or USB)

Optional

- Printer – any printer with Microsoft® Windows support

Software Requirements

- Windows XP Professional including Service Pack 2
- Word 2003 or higher

IMPORTANT

*Make sure that all Microsoft security updates are **manually** installed on a regular basis.*

⚠ CAUTION

Changes or deinstallation made to any of those prerequisite software **after** COACH has been installed, may cause malfunction and result in a new installation of COACH.

IMPORTANT

If necessary, please contact your I.T. department for the relevant information and advice.

LON Interfaces

In order to connect to the LON network, one of the following interfaces must be installed:

- Echelon PCC-10 PCMCIA Card (Laptop)
- Echelon PCLTA-21 PCI Card (Desktop)
- Echelon U10 USB Stick (Laptop and Desktop)
- Loytec NIC709-USB
- Loytec NIC709-IP

The function of COACH is supported for these LON interfaces, however other cards may work also.

Please install the LON interfaces and the corresponding drivers. For relevant documentation and driver please refer to corresponding websites at http://www.echelon.com and http://www.loytec.com.

IMPORTANT

For Echelon LON interfaces, install the driver before the installation of the physical device.

For all LON interfaces, perform a test after installation for proper function of the installed interface.

Font Size Setting

For proper display of custom graphics created with ARENA Editor do **not** change the font size from Normal size (96 DPI) to Large size (120 DPI) under **Settings – Control Panel – Display – Settings – Advanced – DPI Setting**.

INSTALLATION

IMPORTANT

- *Please ensure you are logged onto Windows XP as a user with Administrator privilege having a username and a password in order to be able to install SQL. You must enter a password, otherwise SQL is installed incompletely.*
- *For automatic Windows logon a registry entry needs to be created with username and password.*
- *Please deactivate energy saving options for the PC.*

Prerequisites

The LON interface including the appropriate driver must be installed before hand. Install driver before installing the LON interface hardware.

COACH needs the following prerequisite software packages for proper operation:

- Microsoft SQL Server 5.1

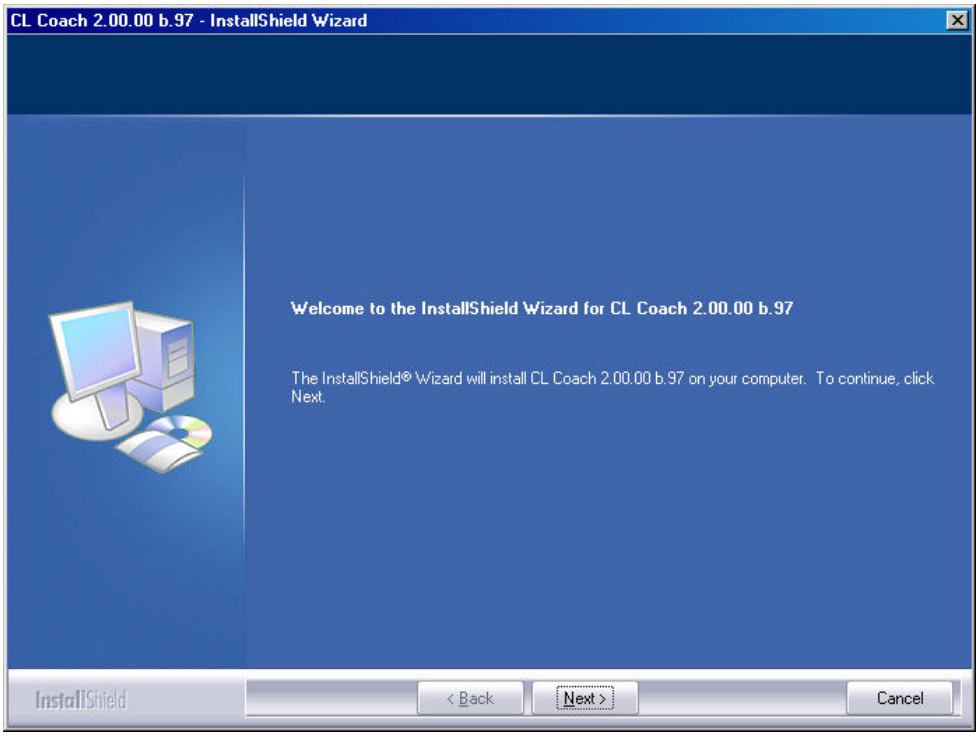
  NOTE: If Full SQL Server is to be used, Microsoft SQL Server 2005 Service Pack 2 must be installed for proper operation. Microsoft SQL Server is available in the COACH Setup folder. During installation, software automatically checks the PC system and asks for appropriate installation steps in order to provide the prerequisite SQL software.

NOTE: During installation, some steps take long, for example the database creation may take up to 15 minutes. Do not shutdown the PC or do any other actions which may interrupt or cancel the installation.

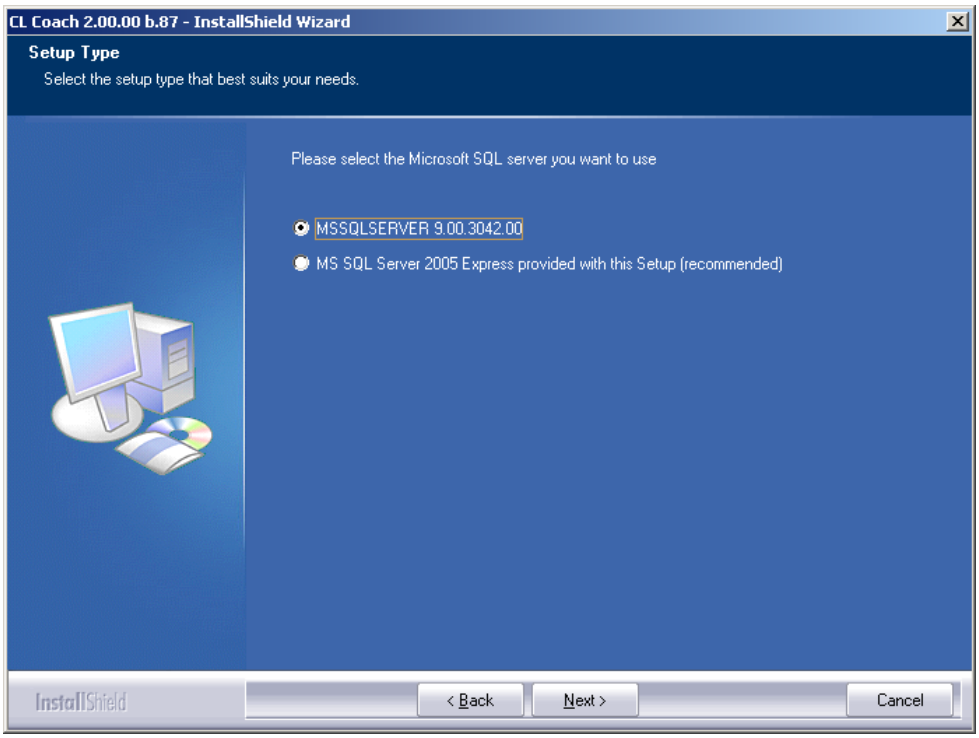
1. Uninstall previously installed COACH 2.0 software version using the **Add or Remove function** in the Windows *Control Panel*.
2. Disable automatic Windows logon.
3. Reboot the PC.

4. Log on with username and password. Please do not leave the **Password** field blank (see ***IMPORTANT*** hint above).
5. Close all running applications.
6. Insert *CentraLine Software* CD in CD-ROM drive.
7. Open the *Setup* folder and then double-click on **Setup.exe**.

   In the following, the most important screens and steps are shown:

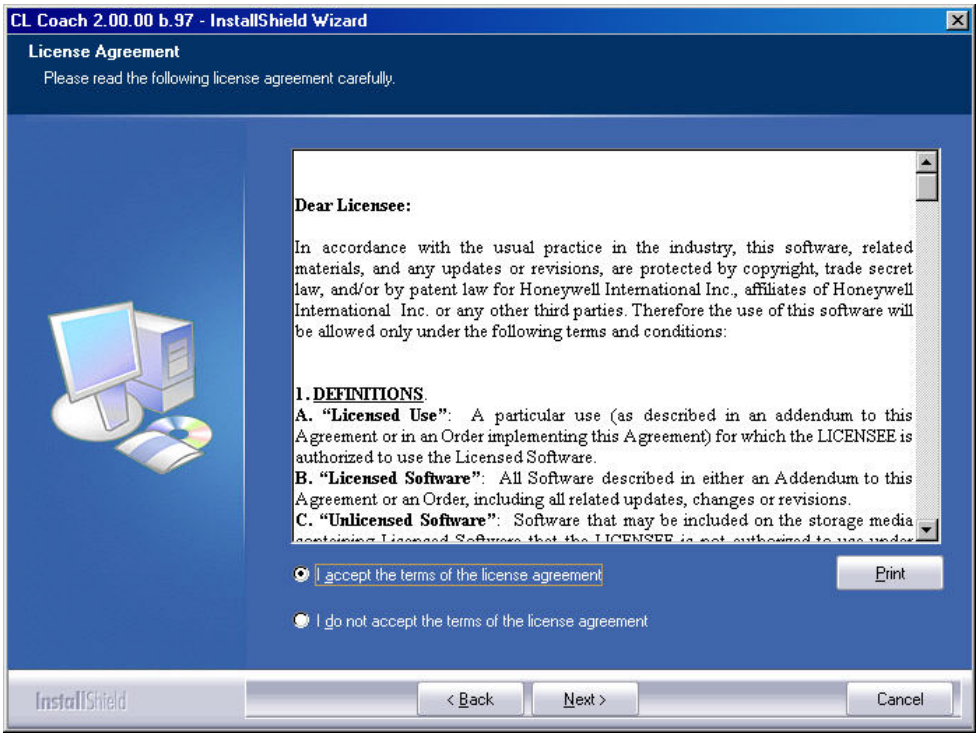


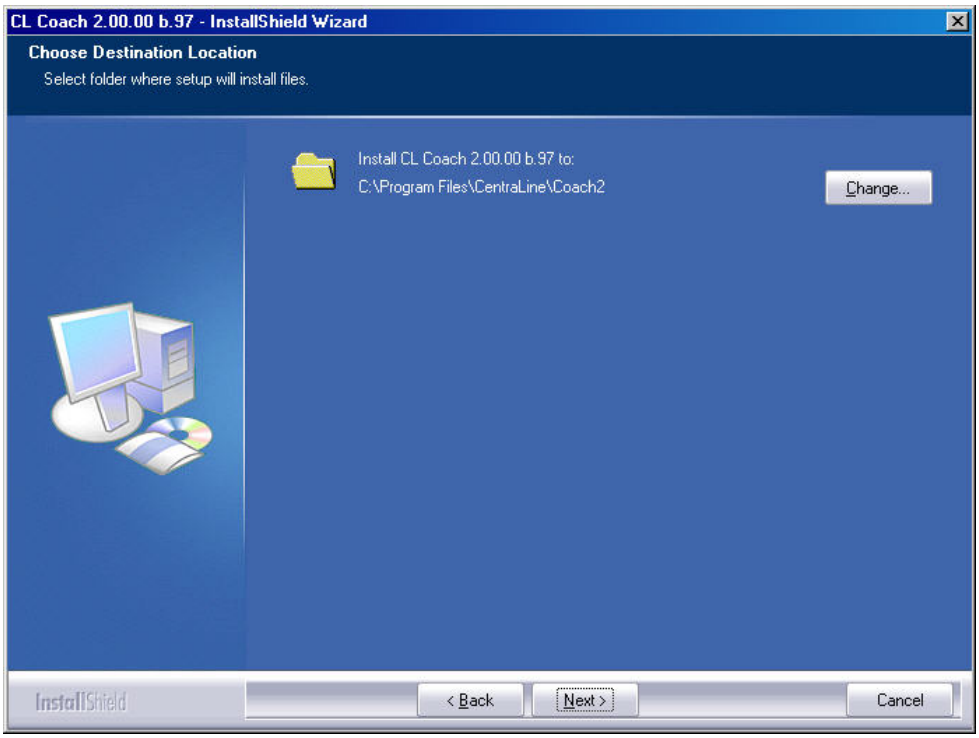
8. To start installation, click **Next** button.

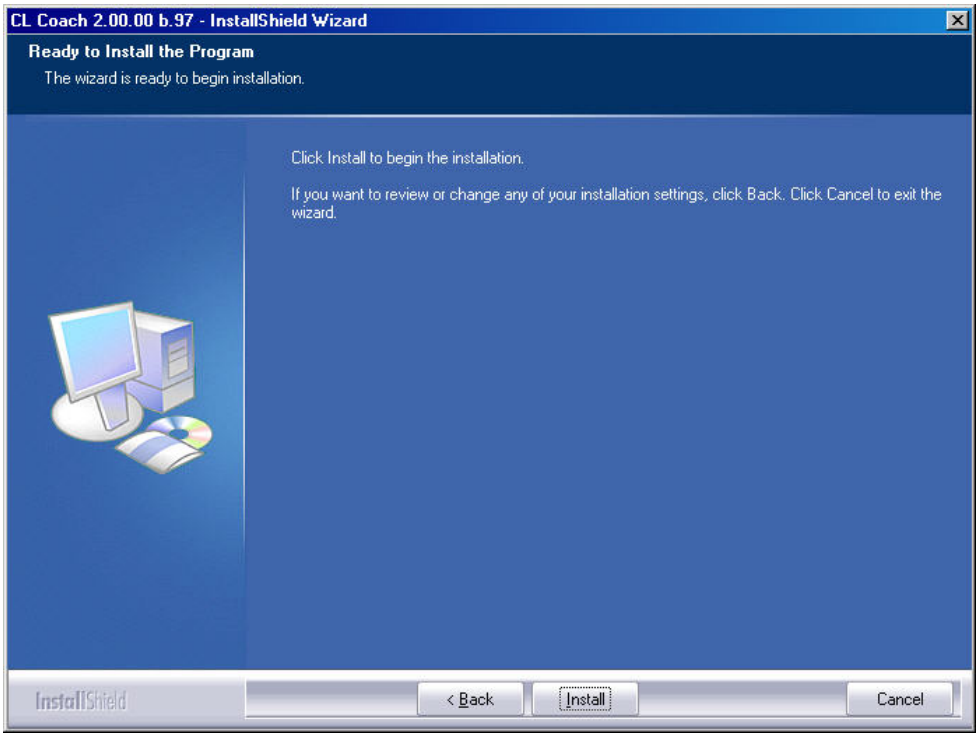


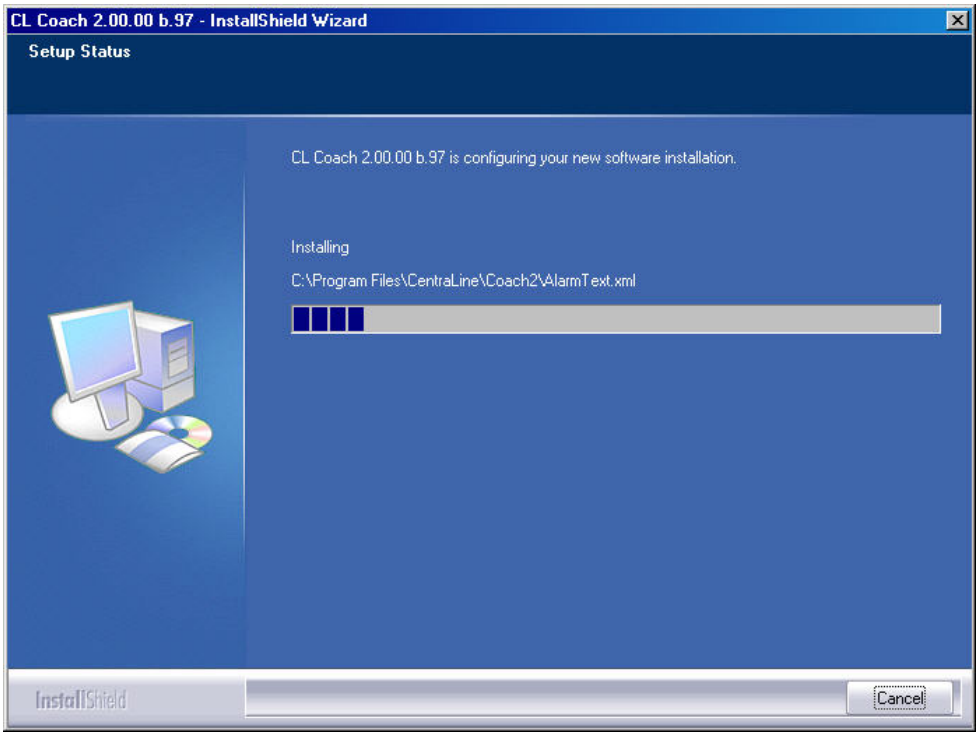
9. Select the SQL Server version. It is recommended to select **MS SQL Server 2005 Express**. But you can also work an already installed SQL server version which is selected then by default.

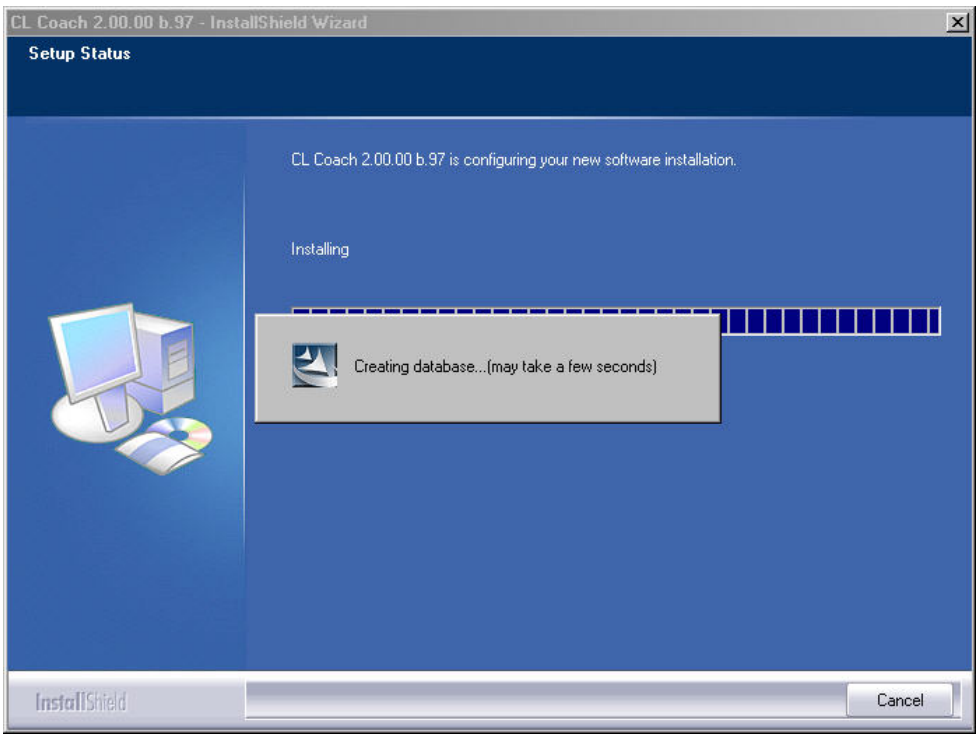
10. Click **Next** and follow the further installation steps.



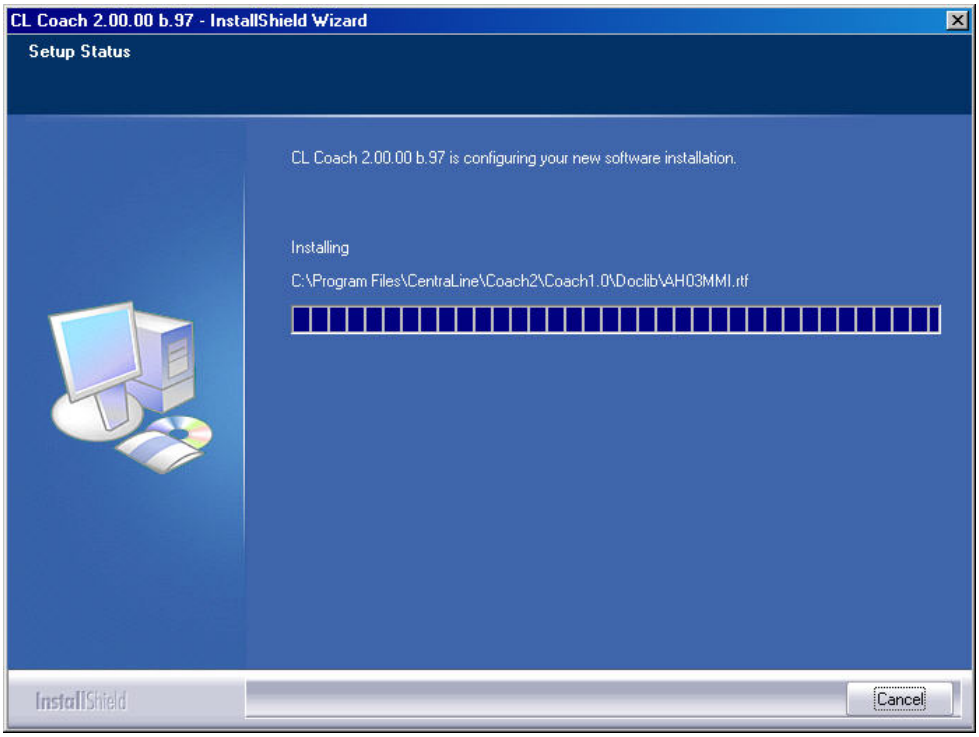


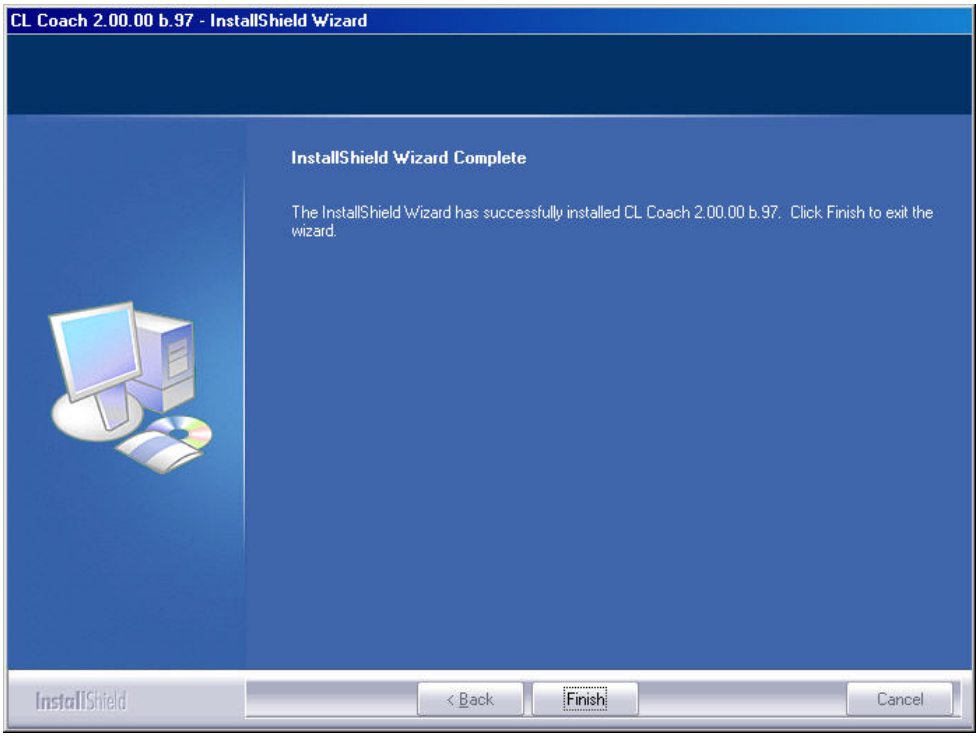

CL Coach 2.00.00 b.97 - InstallShield Wizard
Ready to Install the Program
The wizard is ready to begin installation.
Click Install to begin the installation.
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
InstallShield
< Back
Install
Cancel


CL Coach 2.00.00 b.97 - InstallShield Wizard
Setup Status
CL Coach 2.00.00 b.97 is configuring your new software installation.
Installing
C:\Program Files\CentraLine\Coach2\AlarmText.xml
InstallShield
Cancel



NOTE: Creating the database may take up to 15 minutes. Do not shutdown the PC or do any other actions which may interrupt or cancel the installation.





11. Click **Finish**.
12. In order to use COACH software, you need to register the software in the next step (see "Licensing" section).

    COACH 2.0 and previous COACH versions can be installed in parallel on one PC but cannot be run simultaneously.

LICENSING

Demo Version

At the end of the COACH installation you are asked for a valid license to start COACH with full functionality. Otherwise COACH can only be run as unregistered demo version with restricted functionality (see "How to Use COACH as Demo Version" section).

NOTE: COACH 2.0 cannot be upgraded from previous COACH versions. For COACH 2.0 you need a new license (see “Upgrades” section).

New License

The licensing will be done by using the Registration function of the COACH software and the CentraLine License Server in parallel. The licensing procedure is based on three items:

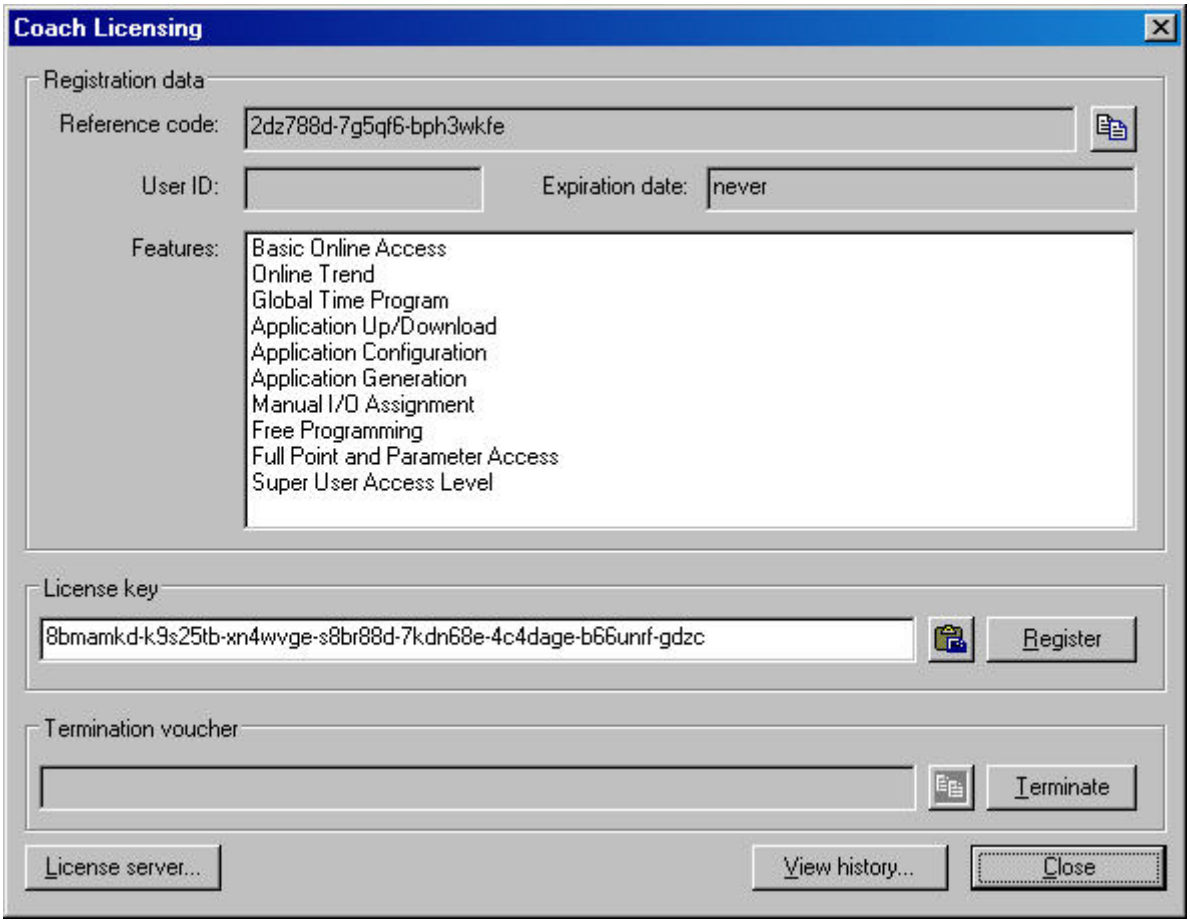
- Voucher number
  Included and printed on the CentraLine Software CD label
- Reference code
  Automatically created on the PC where COACH has been installed
- License key
  Automatically created by the CentraLine License server when following the procedure as described in the following.

➢ Launch the COACH software from the desktop by double-clicking on the *COACH* icon .

RESULT: The following message box displays:

- Click on the **OK** button.

  RESULT: The *Registration* dialog box displays.



In the **Reference code** field, a reference code is displayed which is generated from internal PC data during installation of COACH. This code refers to that particular PC at the time when COACH had been installed. The **License key** field indicates that the License key is invalid.

- Click into the **Reference code** field and highlight the code.
- Press CTRL+C key or click on the **Copy** icon to copy the code to the clipboard.
- In the *Registration* dialog box, click on the **License Server** button or, enter http://license.centraline.com into the Web browser.

On CentraLine License Server

RESULT: The CentraLine License server is invoked.

- Right on the top choose the language in which the license server should be displayed.

USER REGISTRATION

- Click on "User Registration" if you are not registered yet. If you registered continue with logging in.

  RESULT: The *User Registration* screen displays.

- In the **UserName** field, enter your user name without blanks, for example, JohnLogan for John Logan.
- Click on the **Continue** button.
- On this page of the *User Registration* screen, enter you personal data such as First Name, Last Name, Country and Company in the fields of the same name.
- Click on the **Send** button.

  RESULT: You will receive two e-mails with your login data from the CentraLine Product Team: one with your personal data and the other with your password which is needed for future access of the license server.

- Please check your e-mail for the login data and keep them safe.

LOGIN

- Shift to the CentraLine Server and enter your Username and the password in the corresponding fields on the left.
- Click on the **Login** button.

  RESULT: The *License Overview* screen displays.

- Click on the **New License** button.

  RESULT: The *New License* screen displays.

- Click in the **Reference Code** field and press CRTL+V key to paste the reference code. If no reference code is inserted, shift to the COACH *Registration* dialog box, highlight the reference code and click on the **Copy** icon . Shift to the *New License* screen on the License server and paste the reference code into the **Reference Code** field by pressing CRTL+V key.
- Enter the COACH voucher number from the CentraLine Software CD into the **Voucher Number** field.
- Enter a free comment into the **Free comment** field if desired.
- Click on the **Send** button.

  RESULT: The license key is generated.

- Highlight the license key and press CRTL+C key to copy it to the clipboard.
- Shift to the COACH *Registration* dialog box.

In COACH Registration Dialog Box

- Click into the **License key** field.
- Paste the license key into the **License key** field key by clicking CRTL+V key or by clicking on the **Paste** icon.
- Click on the **Register License** button.

  RESULT: In the message box displayed, confirm the registration by clicking the **OK** button. Depending on the licence, the available features will be displayed in the *Features* area.

  NOTE: For more information on the features, please refer to the “Upgrades” section.

- Close the *Registration* dialog box by clicking **OK**.

For procedures on how to:
- Show and modify a license
- Upgrade a license
- Replace a license
- Transfer a license
- View the License history

please view the online documentation on the CentraLine License Server by clicking on the **Help** menu there.

NOTE: With one license, different language versions can be installed, but not in parallel.

Unrecoverable Licenses

⚠ CAUTION

In case you change the hard disk of your PC, terminate the COACH software by using the Termination function (see detailed licensing documentation on the CentraLine License server). If you do not terminate your license, this license will be lost unrecoverable and you will need to order a new license.

How to use COACH as Demo Version

After the COACH software has been installed, this version will automatically be a demo version if it is not registered.

The demo version allows:

- Configuring
- Printing documentation
- Back upping project

The demo does not allow:

- Online access
- Downloading application
- Starting COACH Online

UPGRADES

When installing COACH 2.0, an existing previous COACH version will remain untouched on the PC. You can run both COACH versions but not simultaneously.

A previous COACH version, for example 1.5, cannot be upgraded to COACH 2.0 using an Upgrade-license. For COACH 2.0 you need a new license as shown in the Order Numbers table.

When already using a COACH 2.0 version, 2 Upgrade licenses are available for upgrading the expert level as shown in the Feature Upgrades table.

Table 1: Order Numbers

Order No.	Description	License for
CLCH2DEMO	OACH Demo Version without Voucher: Allows application configuration, printing, saving, but no online access and no generation of downloadable files.	Demo
CLCH2EL1	COACH License for end customer like care taker (user with expert level 1): Allows access to datapoints, settings and time programs of running controllers. The user can see the configured project, but cannot make any changes to the configuration or upload / download.	End User
CLCH2EL2	COACH License for expert end customer=expert care taker (user with expert level 2): Same as CLCH2EL1, but with additional online access to specific controller parameters.	Expert End User
CLCH2EL3	COACH License "Basic" for Partner (user with expert level 3): Allows creation of projects, configuration of controllers, online access to datapoints, settings and time programs, up-/download.	Partner
CLCH2EL4	COACH License "Full" for Partner (user with expert level 4): Like CLCH2EL3 plus in addition: Manual I/O Assignment, Online Trend, Online Remote Access, Full parameter access, switching tables.	Expert Partner

CLCH2UPGREL1EL2	Upgrade from CLCH2EL1 to CLCH2EL2.	
CLCH2UPGREL3EL4	Upgrade from CLCH2EL3 to CLCH2EL4.	
Super user	Internal Use only - Cannot be ordered	Super User

Table 2: Feature Upgrades

COACH 2 New Licenses	Basic Online Access	Online Trend	Global Time program	Application Up/Download	Application Configuration	Application Generation	Manual I/O Assignment	Free Programming	Full Point and Parameter Access	End User Access Level	Expert End User Access Level	Partner Access Level	Expert Partner Access Level	Super User Access Level
CLCH2EL1	X									X				
CLCH2EL2	X	X	X								X			
CLCH2EL3	X	X	X	X	X	X						X		
CLCH2EL4	X	X	X	X	X	X	X	X					X	
COACH SUPER USER	X	X	X	X	X	X	X	X	X					X
COACH 2 Upgrade Licenses														
CLCH2UPGREL1EL2		X	X								X			
CLCH2UPGREL3EL4							X	X					X	

Manufactured for and on behalf of the Environmental and Combustion Controls Division of Honeywell Technologies Sàrl, Ecublens, Route du Bois 37, Switzerland by its Authorized Representative:

CentraLine
Honeywell GmbH
Böblinger Straße 17
D-71101 Schönaich
Tel +49 7031 637 845
Fax +49 7031 637 846
info@centraline.com
www.centraline.com

CentraLine
Honeywell Control Systems Ltd.
Arlington Business Park
UK-Bracknell, Berkshire RG12 1EB
Tel +44 13 44 656 565
Fax +44 13 44 656 563
info-uk@centraline.com
www.centraline.com

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