

Emerson FBxConnect™ Licensing Tool User Manual (for Customers)



Application & Device Safety Considerations

▪ **Reading these Instructions**

Before operating a device or application, read these instructions carefully and understand their safety implications. In some situations, improper use may result in damage or injury. Keep this manual in a convenient location for future reference. Note that these instructions may not cover all details or variations in equipment or cover every possible situation regarding installation, operation, or maintenance. Should problems arise that are not covered sufficiently in the text, immediately contact Energy and Transportation Solutions (ETS) Customer Support for further information.

▪ **Protecting Operating Processes**

The failure of a device or application – for whatever reason – may leave an operating process without appropriate protection and could result in possible damage to property or injury to persons. To protect against this, review the need for additional backup equipment or provide alternate means of protection (such as alarm devices, output limiting, fail-safe valves, relief valves, emergency shutoffs, emergency switches, etc.). Contact ETS for additional information.

▪ **Using Qualified Personnel**

Installation, configuration, and any subsequent modifications to a device or application should only be performed by qualified, suitably trained personnel.

▪ **System Training**

A well-trained workforce is critical to the success of your operation. Knowing how to correctly install, configure, program, calibrate, and troubleshoot your Emerson equipment provides your engineers and technicians with the skills and confidence to optimize your investment. ETS offers a variety of ways for your personnel to acquire essential system expertise. Our full-time professional instructors can conduct classroom training at several of our corporate offices, at your site, or even at your regional Emerson office. You can also receive the same quality training via our live, interactive Emerson Virtual Classroom and save on travel costs. For our complete schedule and further information, contact the ETS Training Department at 800-338-8158 or email us at education@emerson.com.

▪ **Grounding Equipment**

Ground metal enclosures and exposed metal parts of electrical instruments in accordance with relevant safety standards. For the USA, refer to OSHA rules and regulations as specified in *Design Safety Standards for Electrical Systems*, 29 CFR, Part 1910, Subpart S, dated: May 16, 1981 (OSHA rulings are in agreement with the National Electrical Code). For international locations, refer to IEC 60364-4-41: PROTECTION AGAINST ELECTRIC SHOCK. You must also ground mechanical or pneumatic instruments that include electrically operated devices such as lights, switches, relays, alarms, or chart drives. The chassis (or earth ground) lug provides a safe connection point to a customer-designated ground location for ESD and transient voltage suppression. Do not use the chassis ground lug for signal, common, or return connections. **Do not connect the chassis ground lug directly to a lightning arrester/lightning rod.** Do not run signal wiring in conduit or open trays with power wiring or near heavy electrical equipment. If shielded wiring is used, ground the shield of the signal wiring at any one point of the signal loop.

Important: Complying with the codes and regulations of authorities having jurisdiction is essential to ensuring personnel safety. The guidelines and recommendations in this manual are intended to meet or exceed applicable codes and regulations. If differences occur between this manual and the codes and regulations of authorities having jurisdiction, those codes and regulations must take precedence.

▪ **Protecting from Electrostatic Discharge (ESD)**

Any device contains sensitive electronic components which can be damaged by exposure to an ESD voltage. Depending on the magnitude and duration of the ESD, it can result in erratic operation or complete failure of the equipment. Ensure that you correctly care for and handle ESD-sensitive components.

▪ **Ethernet Connectivity**

This automation device is intended to be used in an Ethernet network which does not have public access. The inclusion of this device in a publicly accessible Ethernet-based network is not recommended.

▪ **Returning Equipment**

If you need to return any equipment to ETS, it is your responsibility to ensure that the equipment has been cleaned to safe levels, as defined and/or determined by applicable federal, state and/or local law regulations or codes. You also agree to indemnify ETS and hold ETS harmless from any liability or damage which ETS may incur or suffer due to your failure to ensure device cleanliness.

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Section 1: Introduction

Licensing Tool is a cloud-based licensing system for the software applications that run on the FB3000 RTU. Customers can purchase add-on features and special applications from their Emerson Impact Partner (or local Emerson representative for their world area) to run on an FB3000 RTU. These applications enable the FB3000 to handle additional meter runs, or to perform special calculations or custom logic not included in the standard base firmware of the FB3000.

1.1 Abbreviations, Acronyms, and Terms

This section describes the abbreviations, acronyms, and terms used throughout this manual.




Term	Description
Product	The software application that runs on the RTU.
Company/Customer	Organizations or businesses that use devices and licenses for business processes. The terms <i>Company</i> and <i>Customer</i> are interchangeably used throughout the document.
EIP	Emerson Impact Partner (“EIP” or “partner”): the organization that – on behalf of Energy and Transportation Solutions – facilitates the purchase of licenses and the commissioning of FBx devices at customer sites.
Device	The Emerson hardware — in this case — an FB3000 RTU. The serial number on the RTU identifies the devices in the licensing system. You can find the serial number of a device registered with the ECP on the Devices tab. To find the device serial number on the hardware, locate the S/N item on the label of the CPU module and then look for a case-sensitive 9 or 10-character string. If the device shipped from the factory pre-configured, the Emerson Impact Partner or representative typically pre-assigns the license to the device so the ECP recognizes the serial number. Alternatively, suppose you want to add a license to a device already at a customer site. In that case, the impact partner or representative must assign the license to the customer site where the device resides for the device to be recognized in the ECP.

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Term	Description
Site	Sites (also called “assets”) are user-defined groupings of devices and/or products within an organization or business. For example, T&D Natural Gas Company might have two sites named either “Southeast Production Field” and “Western Production Field” or “Department 1” and “Department 2”. Select names for your sites/assets which are meaningful for your organization.
RTU	Remote Terminal Unit
DPL	Denied Party List
MFA	Multi-Factor Authentication

Icon	Description
	Click to open the selected item for editing.
	Click to disable the selected item. The system typically displays a confirmation message to verify the action.
	Click to include the selected item.

Section 2: Knowing your application

2.1 Overview

The Licensing Tool application is an essential tool for businesses and organizations that require efficient tracking and management of software licenses.

The Licensing Tool application integrates with the Field Tools application to serve Partner and Customer users.

The application provides functionalities such as fulfillment of back-to-back orders, license activations, transfers of licenses/devices, site management, user management, and historical logs for the end-user's convenience.

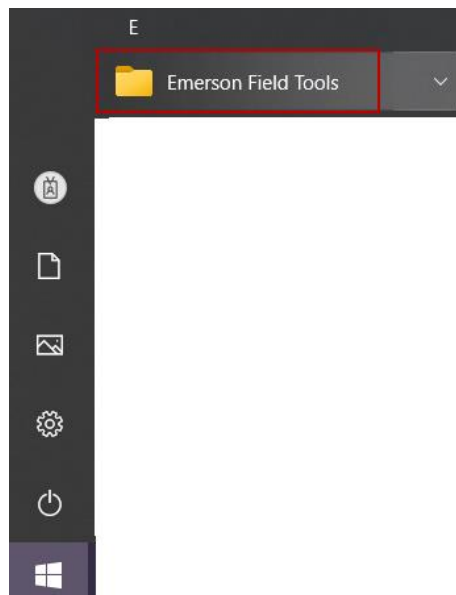
FBxConnect downloads the license file to the device and facilitates communication with the server. Its use is currently limited to Emerson's FB3000 devices.

2.2 Launching the application

To launch the application,

1. Go to the start menu and locate Emerson Field Tools.

Figure 1. Locating Emerson Field Tools




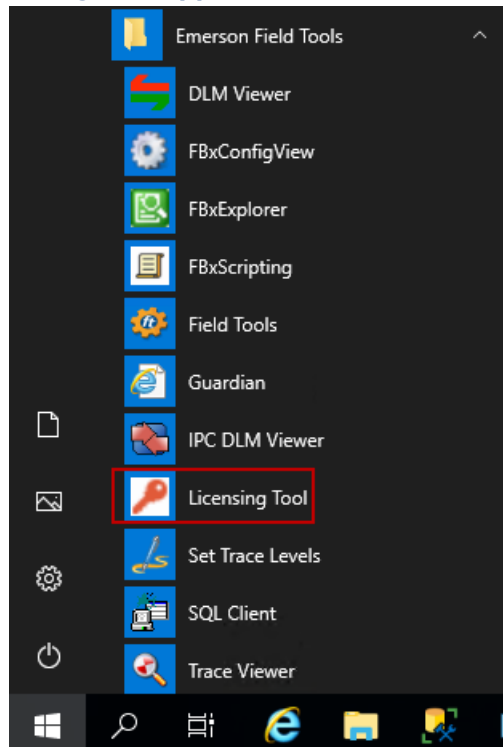
2. Click the  arrow to see the associated applications.

Figure 2. Launching Licensing Tool application



3. Click **Licensing Tool**. This launches the Licensing tool application.
4. Click **Sign In** to log in to the application.

2.3 Logging in for the first time

1. If you do not have an account on the Licensing Tool, contact an Emerson Impact Partner, Customer or Guardian administrator to create one for you as a new user.
2. Once the account is created, Emerson receives an email requesting DPL approval.
3. Emerson reviews the account information. Upon approval of the DPL, your email ID is added to the system.
4. On your first login, click on the "Forgot password" link.

Figure 3. First-time Login

User Authentication

Enter Your Password

Enter your password to continue to Licensing Tool.

[Edit](#)

Password*

[Forgot password?](#)

[LOG IN](#)

This action sends a password reset email to your email ID.

Figure 4. Resetting password

User Authentication

Check Your Email

Please check the email address kush@emerson.com for instructions to reset your password.

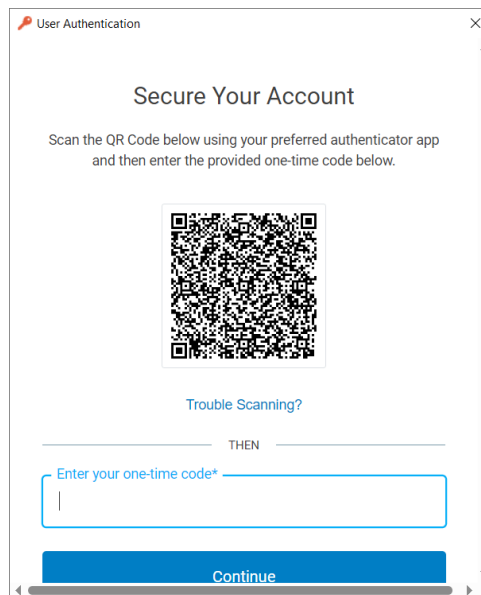
[Resend email](#)

5. Follow the instructions in the email to set your new password.
6. Enter the new credentials. The software prompts for an additional form of authentication. Refer section **Multi-Factor Authentication** for details.

2.4 Multi-Factor Authentication

1. Upon providing the correct credentials, you are prompted to register for Multi-Factor Authentication (MFA) using an authenticator app.

Figure 5. Scanning QR code for MFA



Notes

- If in case you are unable to scan the QR code, click the [Trouble Scanning?](#) link.
- If you **do not have a smartphone** to scan the QR code, download a TOTP (time-based one-time password) app for the desktop to generate the one-time code. Alternatively, you can use a password manager like Keeper to generate the one-time code.
- If you have switched to a new smartphone or cannot access the authenticator app anymore, please reach out to Guardian tech support.

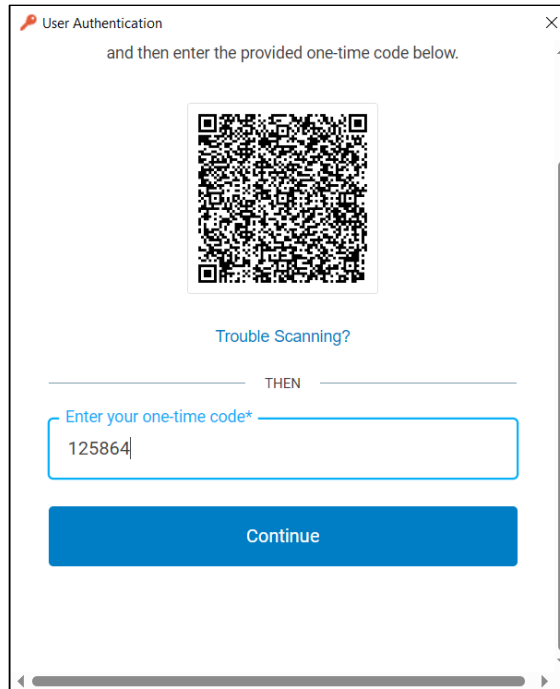
2. Open their authenticator app and scan the displayed QR code. A 6-digit code appears for the associated account.

Note

We recommend using either the Google Authenticator app, Microsoft Authenticator app, or any other reliable authentication application that suits your needs.

3. Enters this code into the "one-time code" field.

Figure 6. Entering the one-time code



4. Entering the correct code successfully opens the home page of the application.

2.4.1 Trouble Scanning

This is an alternate method to perform the multi-factor authentication if in case the QR code doesn't work.

1. Click the **Trouble Scanning?** link to access the alternate MFA method.

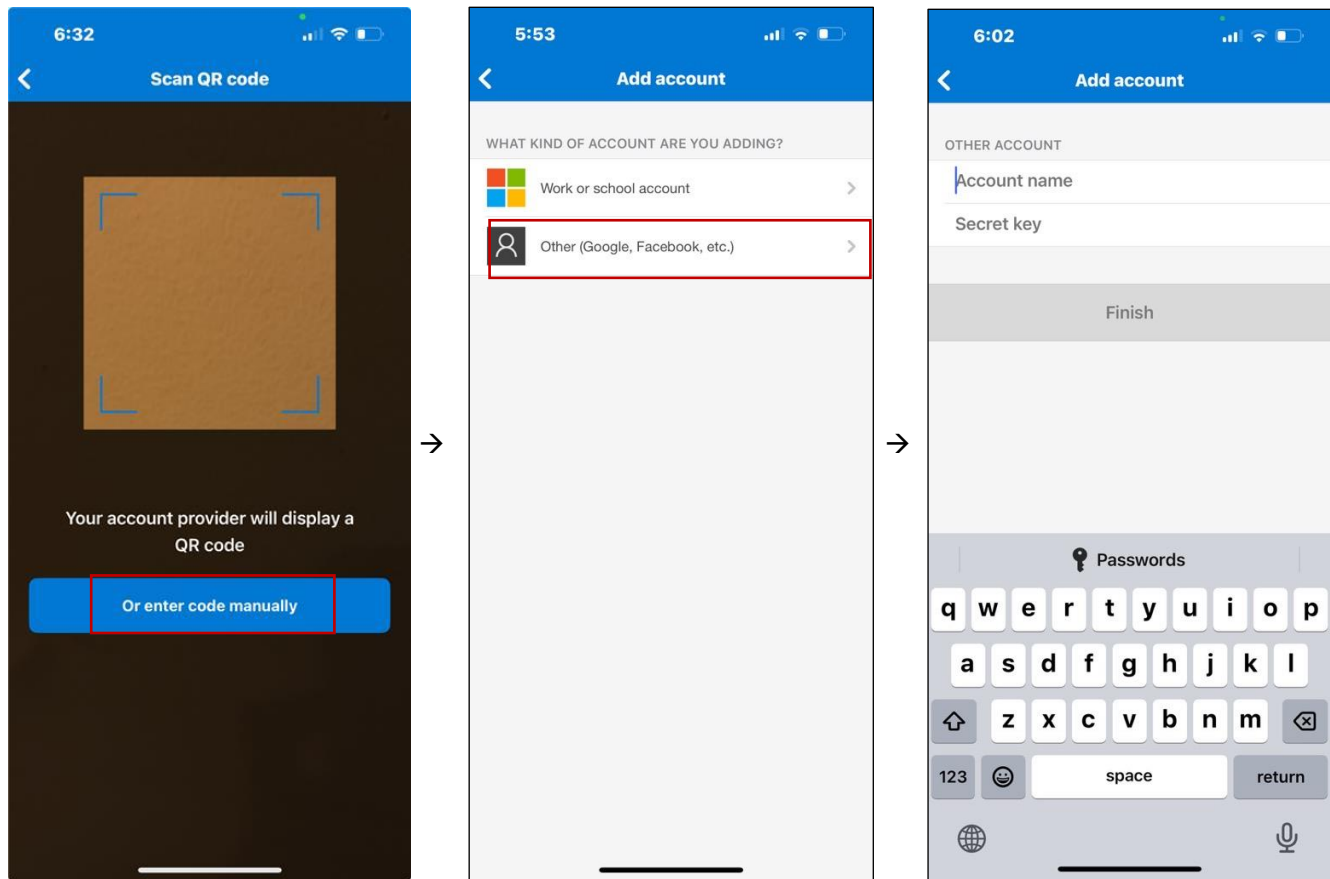
Figure 7. Performing MFA by alternate method

The screenshot shows a 'User Authentication' window with the following elements:

- Title: User Authentication
- Section: Secure Your Account
- Instruction: Manually enter the following code into your preferred authenticator app and then enter the provided one-time code below.
- Code: FR4CS0JQMFTTSN2JFR2DOMRKKQZTKVSW
- Buttons: Copy code, Continue
- Input field: Enter your one-time code*

2. You have two options for entering the code into your authenticator app:
 - a. Manually enter the given code into your authenticator app.
 - b. Click the 'Copy Code' button to copy the code.
3. If you choose the 'Copy Code' option, send the copied code to your email address.
4. Access your email on the device where your authenticator app is installed.
5. Open the email containing the code and copy it.
6. Open the authenticator app, access the scanner, add an (other) account, and enter the copied code in the Secret key field

Figure 8. Generating the one-time code



7. Click Finish to generate the one-time code on the authenticator app.
8. Enter the One-time code on the User authentication screen [Figure 7. Performing MFA by alternate method](#) on your system. A valid code allows you to successfully log in into the application.

2.5 Understanding the user interface

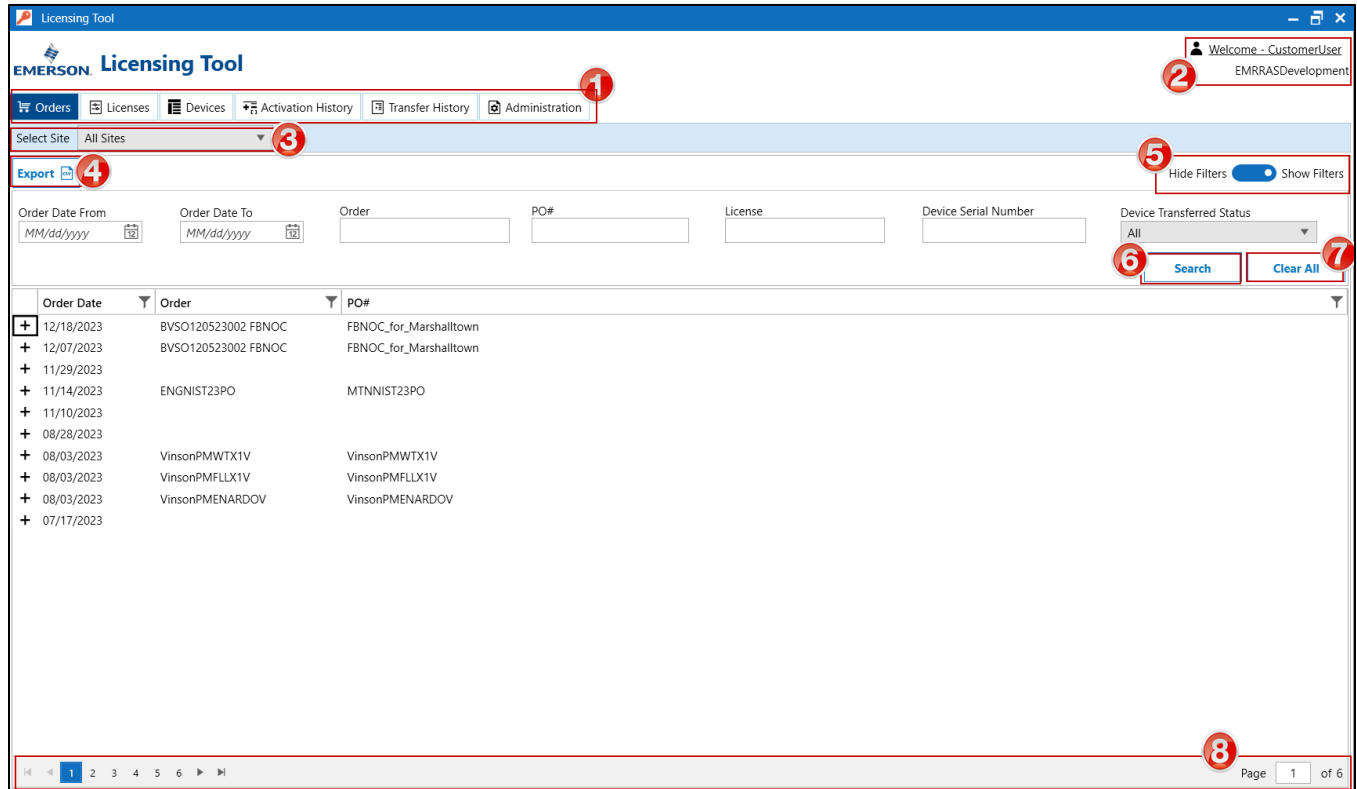
Licensing Tool has a simple user interface designed for the ease of use. There are seven tabs available on the user interface. The system displays the **Orders** tab when the application opens:

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Figure 9. User Interface



Field

Description

1

Tabs

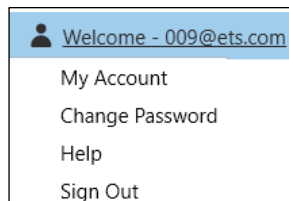
The user interface has the following tabs:








- Orders
- Products
- Devices
- Activations
- Transfer Logs
- Reports
- Administration

2

Logged in user

Shows the details of the logged-in user. Click the username to display the following options:

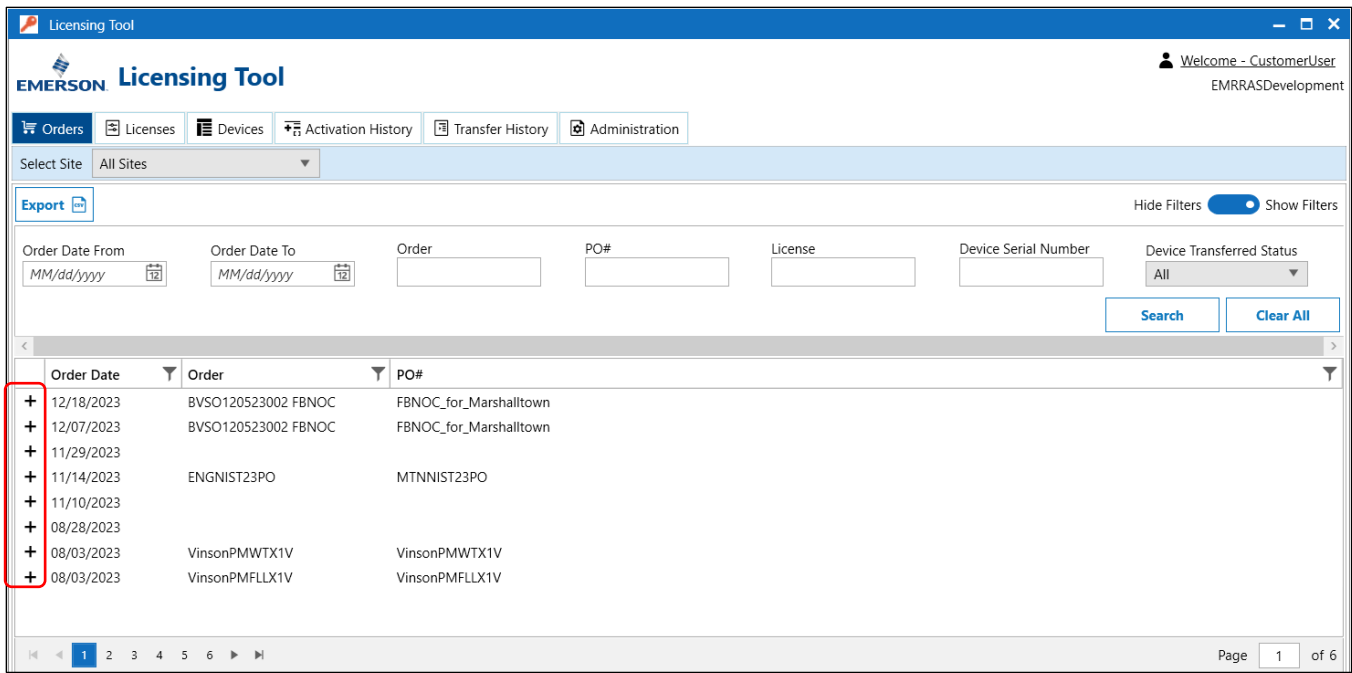


Field	Description
	Select site Select a site from a drop-down list. The system filters records specific to the selected site.
	Export Click to export the data of the selected tab into a CSV format.
	Show/Hide filters Toggle to view or hide filters.
	Search Click to search the content based on the available filter criteria. The number of fields available for filtering the content varies on each tab.
	Clear all Click to clear all the applied filters.
	Status bar Displays details of the currently open page number and the total number of pages available. Note: Each page displays a maximum of ten records. Use the navigation arrows () to move between page numbers.

Section 3: Viewing the orders

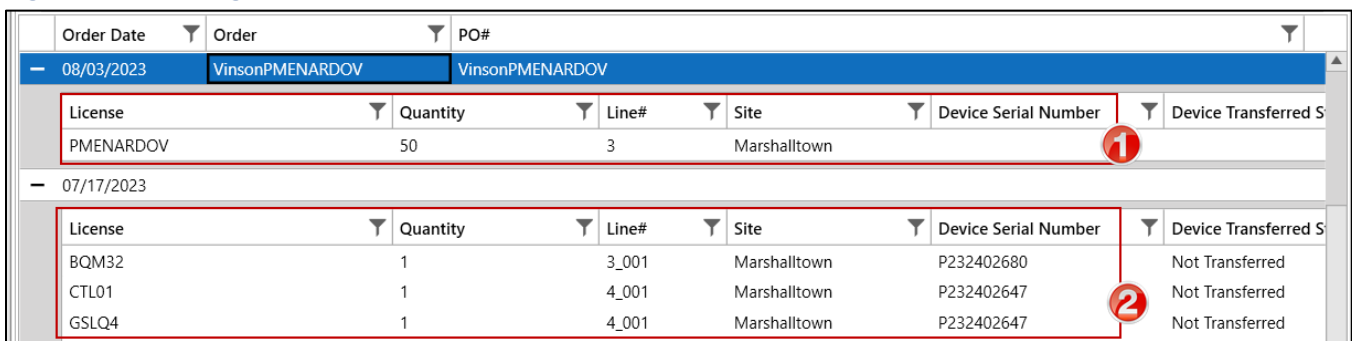
The **Orders** tab (after you sign into the application) lists all the available orders for the selected site.

Figure 10. Viewing orders



Click **+** (at the left of each order) to show the details for a specific record:

Figure 11. Viewing order details



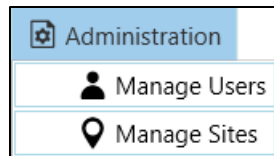
As illustrated in the **Figure 11. Viewing order details** screen, an order can have -

- 1 License(s) without an associated device
- 2 License(s) with an associated device

Section 4: Working with the Administration tab

The **Administration** tab allows the customer admin user to manage its own users and sites.

Figure 12. Working with the Administration tab



Refer to the following sections for details:

- *Managing users*
- *Managing sites*

4.1 Managing users

Users are the individuals who interact with software applications for various purposes. They have different roles and access levels based on which functionalities accessible to them.

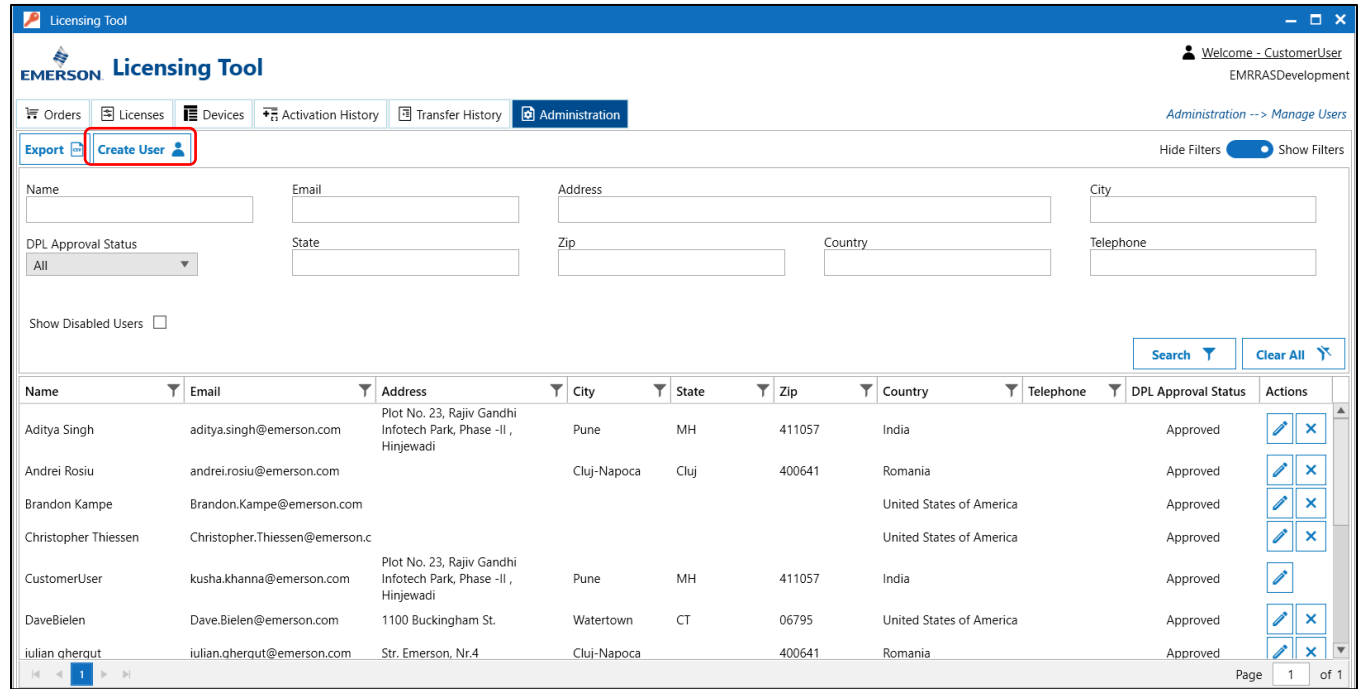
Use this function to create, edit, or delete a user. When you click **Manage Users**, the system displays the list of users:

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Figure 13. Managing users



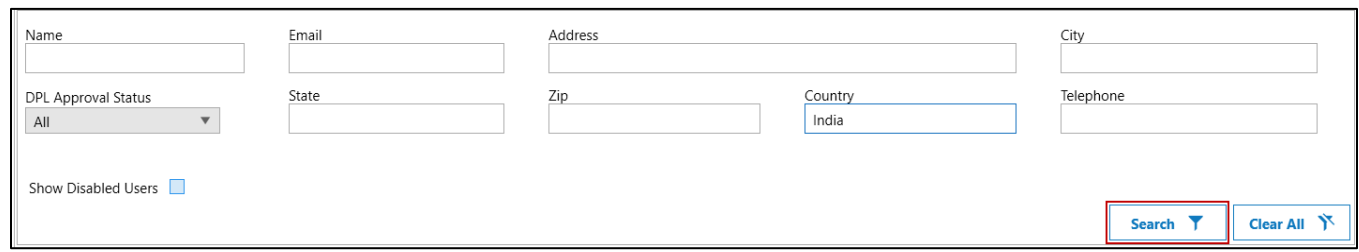
Filtering Content by Search Criteria

You can filter the displayed records using different search criteria. For example, to filter the users by the country "India":

9. Enter country name as **India**.

10. Click **Search**:

Figure 14. Searching users



The system displays all the records matching the search criteria:

Figure 15. Viewing filtered records

Name	Email	Address	City	State	Zip	Country	Telephone	DPL Approval Status	Actions
Aditya Singh	aditya.singh@emerson.com	Plot No. 23, Rajiv Gandhi Infotech Park, Phase -II, Hinjewadi	Pune	MH	411057	India		Approved	
CustomerUser	kusha.khanna@emerson.com	Plot No. 23, Rajiv Gandhi Infotech Park, Phase -II, Hinjewadi	Pune	MH	411057	India		Approved	
vinodkumar.guthula	Vinodkumar.Guthula@emerson.com		Pune	MH		India		Approved	

To clear the filter, click **Clear All** in **Figure 14. Searching users**.

4.1.1 Creating a new user

To create a new user for the customer:

1. Click **Create User** (as shown on the Licensing Tool Administration screen, **Figure 13. Managing users**). The system displays the **Add or update user** screen, showing the **User Details** tab:

Figure 16. Add or update user screen

Add or Update User
✕

User Details

Sites Roles

Name *

Email *

Default Rights

Country *

Address

State

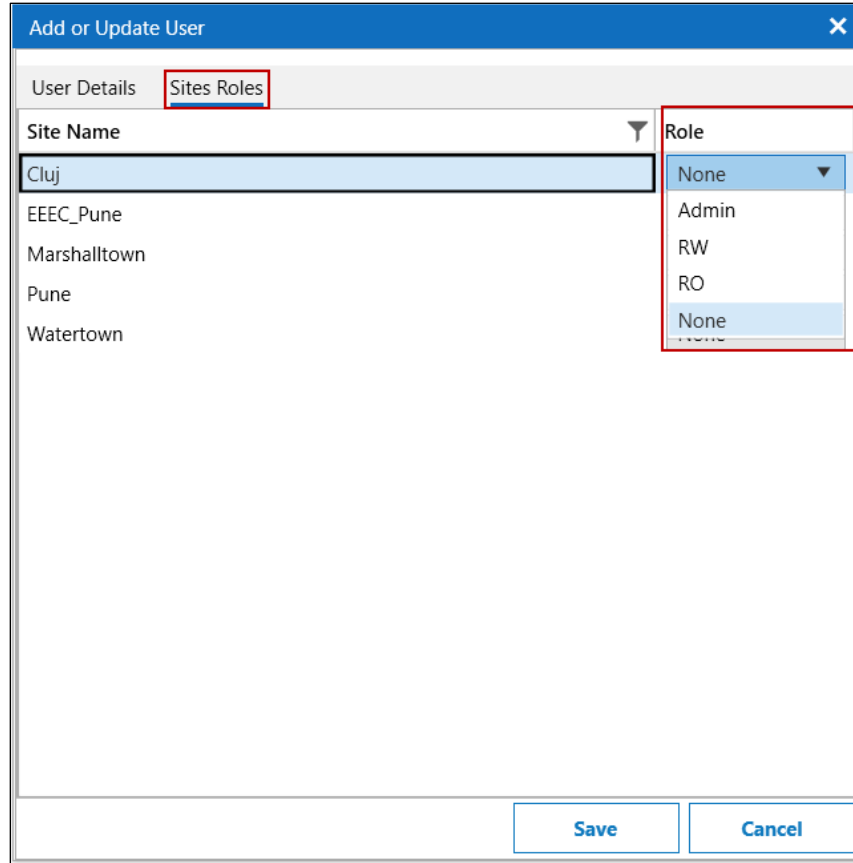
City

Zip

Telephone

2. Enter the new user details (* asterisks indicate mandatory fields) and click the **Sites Roles** tab. The system displays the Sites Roles screen:

Figure 17. Add or update user: Sites Roles tab



- Assign **roles** (Admin, RW, RO, or None) to the users on the required sites. “Roles” define the system activities each user can perform:

Role (Default)	Activities/ Permissions
Admin	Administration tab is visible. The admin user can - <ul style="list-style-type: none"> ○ Create/edit/disable customer site ○ Create/edit/disable customer users
None/RW/RO	Administration tab is not visible (Any of the above functionalities is not visible)

Role (Site wise)	Activities
Site Admin	Site admin can - <ul style="list-style-type: none"> • Export data • Manage devices (add license, edit description, transfer (single/multiple), download license file, revoke license) • Transfer licenses (single/multiple)

Role (Site wise)	Activities
RW	Users with RW rights can - <ul style="list-style-type: none"> Export data Manage devices (add license, edit description, download license file, revoke license) View data on orders, licenses, devices, activations, and view activation and transfer history (for the site) Export data on orders, licenses, devices, activations, and transfer history (for the site)
RO	Users with RO rights can- <ul style="list-style-type: none"> View data on orders, licenses, devices, activations, and transfer history Export data on orders, licenses, devices, activations, and transfer history Manage devices (download license file)
None	For the user with None rights, no activities are permitted. The following two conditions are applicable- <ul style="list-style-type: none"> when the user has access to the site with None privilege - the system displays <i>No sites to see the data.</i> when the user has access to one or more sites with mixed privileges - the user will not be able to see the data of the site having None privilege.

- Click **Save**. The system creates a new user with the selected role and adds the user to the list of users on the Licensing Tool Administration screen.

4.1.2 Editing a user

To edit a selected user’s details:







- Click the  icon at the extreme right of a user’s record (shown in **Figure 13. Managing users**):

Figure 18. User record

Name	Email	Address	City	State	Zip	Country	Telephone	DPL Approval Status	Actions
Aditya Singh	aditya.singh@emerson.com	Plot No. 23, Rajiv Gandhi Infotech Park, Phase -II , Hinjewadi	Pune	MH	411057	India		Approved	 
CustomerUser	kusha.khanna@emerson.com	Plot No. 23, Rajiv Gandhi Infotech Park, Phase -II , Hinjewadi	Pune	MH	411057	India		Approved	
Test user 1	TestUser1@in.com	Street no 123, Applewood	Nasik	Maharashtra	313001	India		Pending	 

The system displays the Add or update user screen, showing the User Details tab:

Figure 19. Add or update user screen: User Details tab

The screenshot shows a window titled "Add or Update User" with a close button (X) in the top right corner. Below the title bar are two tabs: "User Details" (selected) and "Sites Roles". The "User Details" tab contains the following fields:

- Name *: Test user 1
- Email *Ⓜ: TestUser1@in.com
- Default Rights: None (dropdown menu)
- Country *: India
- Address: Street no 123, Applewood
- State: Maharashtra
- City: Nasik
- Zip: 313001
- Telephone: (empty field)

At the bottom right of the form are two buttons: "Save" and "Cancel".

2. Make required changes in the user details or roles and click **Save**. The system updates the user details.

4.1.3 Disabling a user

Use this function to disable a defined user temporarily. This does not remove the user from the system, but only hides it from the list of users but only restricts their access to the application.

To disable a user:






1. Click the **X** icon at the extreme right of a user's record (shown in **Figure 18. User record**). The system displays a confirmation screen:

Figure 20. Disable Confirmation screen

The screenshot shows a "Confirmation" dialog box with a close button (X) in the top right corner. It contains a question mark icon and the text: "Do you want to disable the following user? Name : Test user 1". At the bottom are two buttons: "Yes" and "No".

- Click **Yes** to confirm. The system hides the selected entry from the users' list.

Figure 21. User record disabled

Name	Email	Address	City	State	Zip	Country	Telephone	DPL Approval Status	Actions
Aditya Singh	aditya.singh@emerson.com	Plot No. 23, Rajiv Gandhi Infotech Park, Phase -II, Hinjewadi	Pune	MH	411057	India		Approved	 
CustomerUser	kusha.khanna@emerson.com	Plot No. 23, Rajiv Gandhi Infotech Park, Phase -II, Hinjewadi	Pune	MH	411057	India		Approved	
Test user 1	TestUser1@in.com	Street no 123, Applewood	Nasik	Maharashtra	313001	India		Pending	 

Note

To re-enable the disabled user, see *Enabling a disabled user* below.

4.1.4 Enabling a disabled user

To re-enable a disabled user:

- Select the **Show Disabled Users** option on the Administration screen:

Figure 22. Searching users

Name

Email

Address

City

DPL Approval Status


State

Zip

Country

Telephone

Show Disabled Users

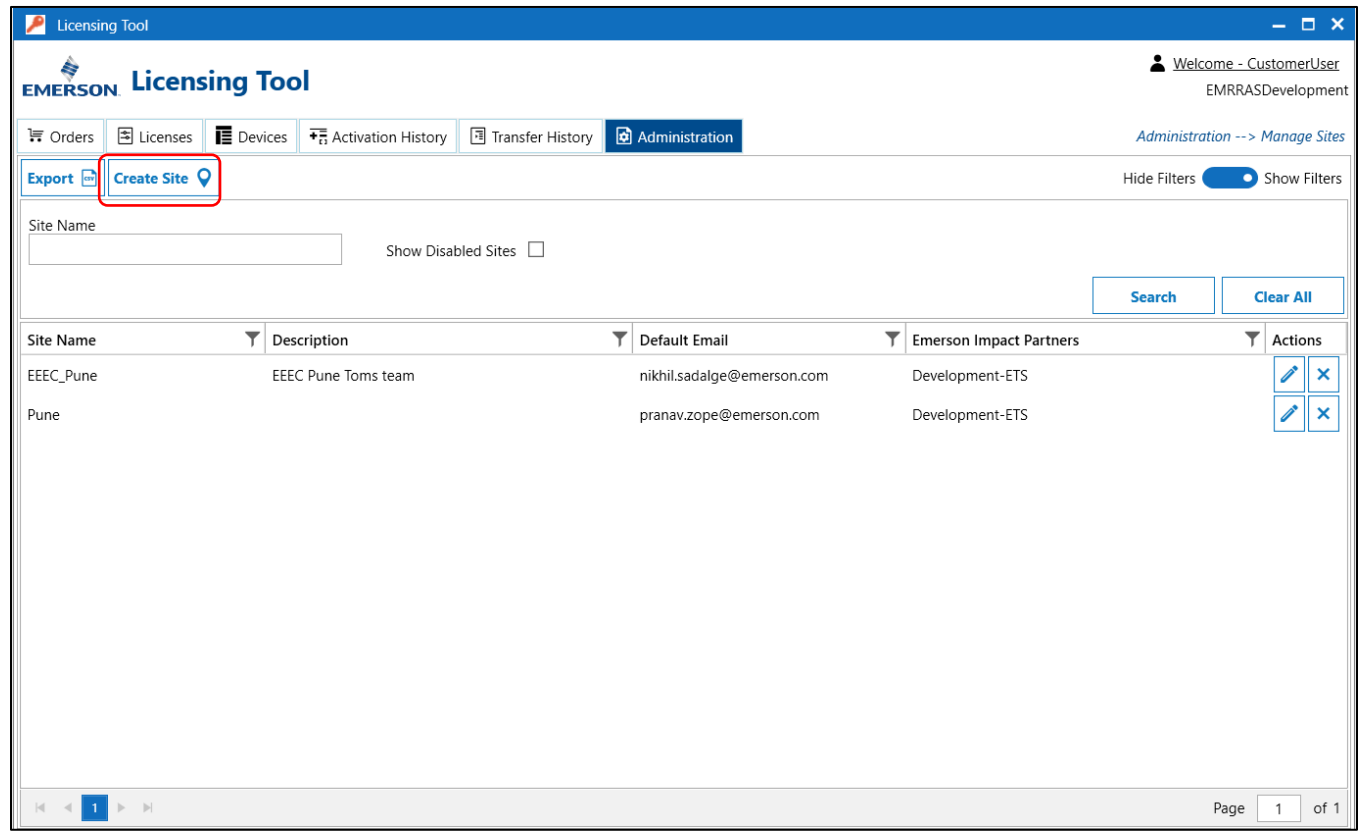
- Click **Search**. The disabled username reappears in the user list.
- Click the  icon in front of the username. The system displays a confirmation message.
- Click **Yes** on the confirmation message the system displays. The system re-enables the username.

4.2 Managing sites

Sites (also called “assets”) are physical/logical groupings where devices and/or products are located within an organization or business. For example, T&D Natural Gas Company might have two sites named either “Southeast Production Field” and “Western Production Field” or “Department 1” and “Department 2.” Select names for your sites that are meaningful for your organization.

Use this function to create, edit, or disable sites. From the Administration tab’s drop-down menu, click **Manage Sites**. The system displays a listing of defined sites:

Figure 23. Site listing



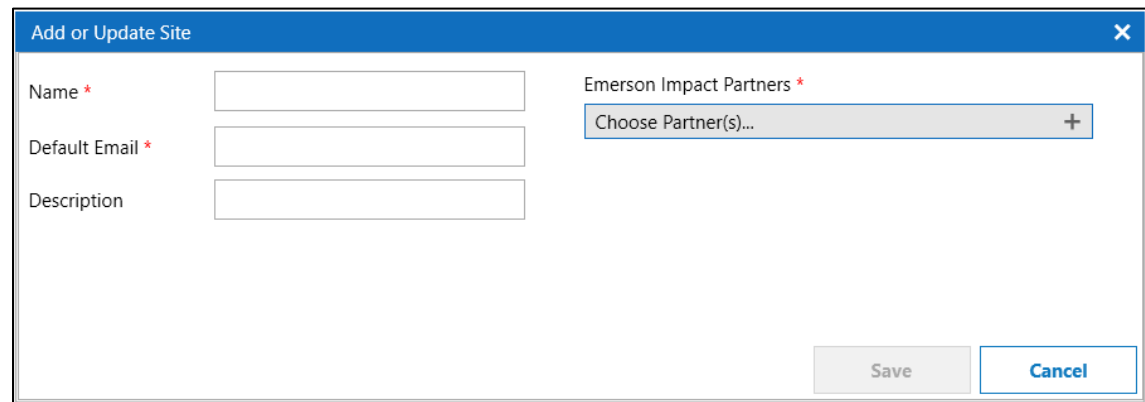
4.2.1 Creating a new site

Use this function to create a new site and associate partner(s) to that site.

To create a new site:

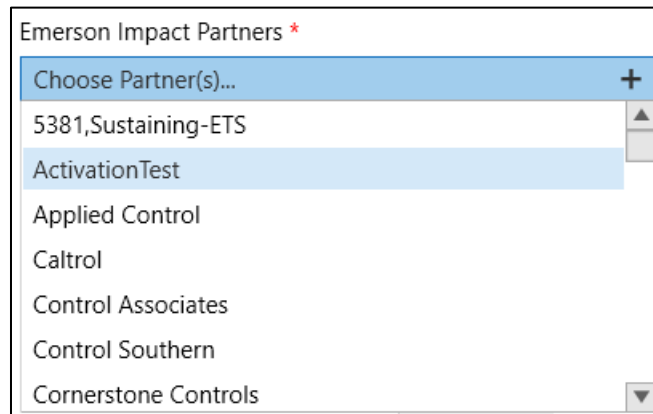
1. Click **Create New Site** in the site listing. The system displays the Add or update site screen:

Figure 24. Creating a new site



2. Enter the necessary details (the Name, Default Email, and Emerson Impact Partners fields are required). When any software product order is received on this site, the notification email will be received at this email address.
3. Select Emerson Impact Partners to associate with the site.

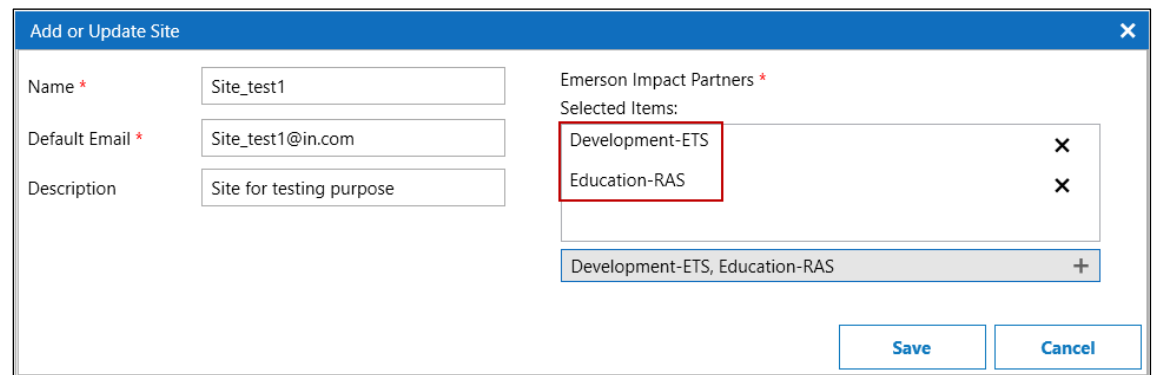
Figure 25. Selecting Impact Partners



Note





Customers can associate more than one partner to its site. This means, one customer can have more than one partner as shown below. All those partners can manage the customer simultaneously.

Figure 26. Selecting multiple Impact Partners



4. Click **Save**. The system adds the new site to the list of sites.

Figure 27. Adding multiple Impact Partners

Site Name	Description	Default Email	Emerson Impact Partners	Actions
EEEC_Pune	EEEC Pune Toms team	nikhil.sadalge@emerson.com	Development-ETS	 
Pune		pranav.zope@emerson.com	Development-ETS	 
Site_test1	Site created for testing	Site_test1@in.com	Development-ETS, Education-RAS	 

4.2.2 Editing a site

To edit a site:


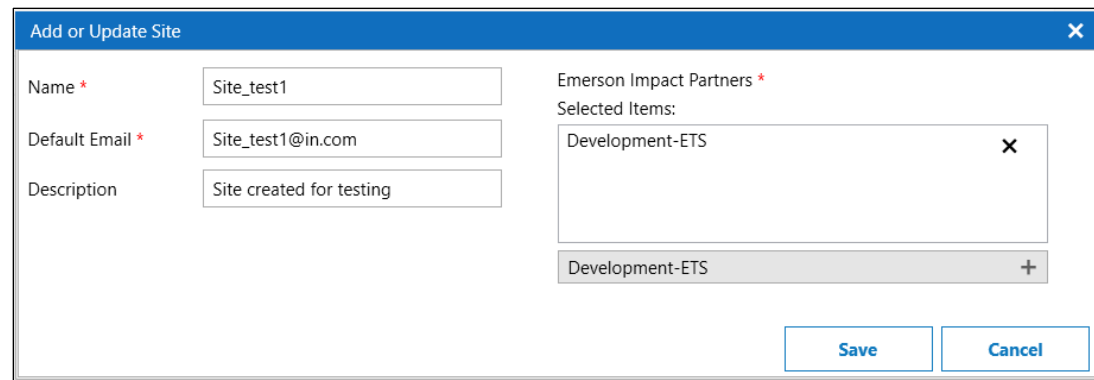
1. Select a site from the list of sites and click the  icon. The system displays the Add or Update site screen:

Figure 28. Add or Update Site screen



The dialog box titled "Add or Update Site" contains the following fields and controls:

- Name ***: Text input field containing "Site_test1".
- Default Email ***: Text input field containing "Site_test1@in.com".
- Description**: Text input field containing "Site created for testing".
- Emerson Impact Partners ***: A section with a "Selected Items:" list containing "Development-ETS" with a close icon (X). Below the list is a button with "Development-ETS" and a plus icon (+).
- Buttons**: "Save" and "Cancel" buttons at the bottom right.

2. Make the required changes and click **Save**. The system updates the site details.

4.2.3 Disabling a site

When a site is disabled, site users or partners cannot-

- send products/devices to this site
- view the data from this site

To disable a site:


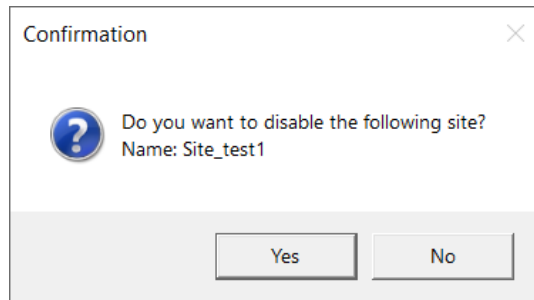
1. Select a site to be disabled from the list of sites and click the  icon at the right of the site's listing. The system displays a confirmation screen:

Figure 29. Confirmation of site disable



2. Click **Yes** to confirm. The system hides the disabled site from the site listing but **does not** delete the site.

Note

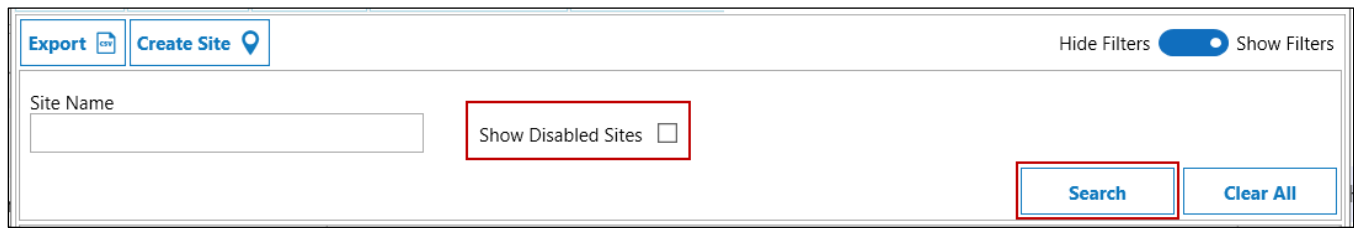
To enable to disabled site, see *Enabling a disabled site* below.


4.2.4 Enabling a disabled site

To re-enable a disabled site:

1. Select the **Show Disabled Sites** option on the site listing screen:

Figure 30. Show disabled sites option

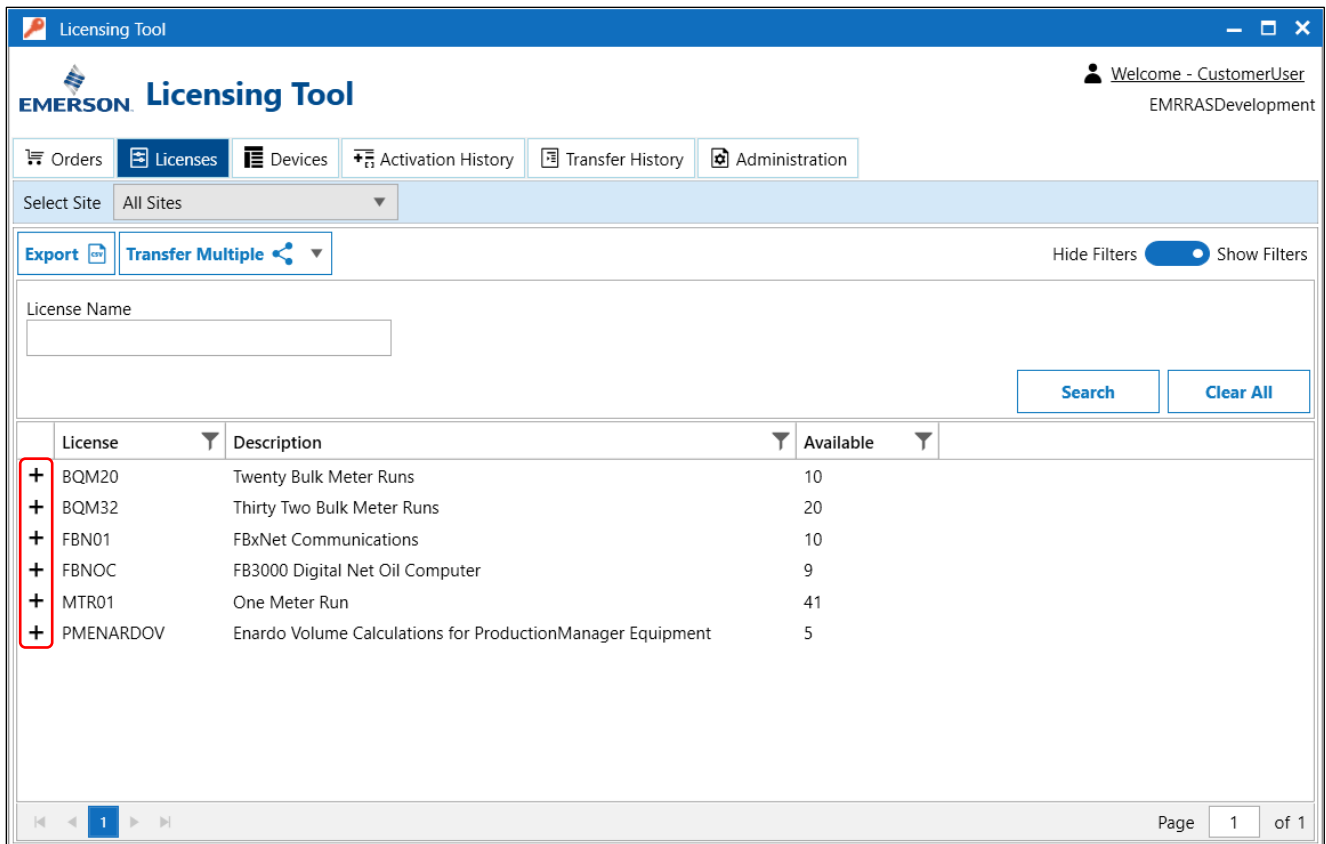


2. Click **Search**. The system adds the names of all disabled sites to the site list.
3. Click the  icon in front of the site name followed by **Yes** on the confirmation message that appears. The system adds the selected company back to the site listing as an enabled site.

Section 5: Working with licenses



The **Licenses** tab lists all the product licenses available across all sites of the logged-in customer. Select the Licenses tab to display the product license listing screen:

Figure 31. Licenses Listing



Clicking **+** expands product license details and enables actions on the licenses as shown below:

Figure 32. License details

	License	Description	Available	
+	BQM20	Twenty Bulk Meter Runs	10	
-	BQM32	Thirty Two Bulk Meter Runs	20	
Site		Available	Actions	
Pune		20	 	
+	FBN01	FBxNet Communications	9	
+	FBNOC	FB3000 Digital Net Oil Computer	9	
+	MTR01	One Meter Run	41	
+	PMENARDOV	Enardo Volume Calculations for ProductionManager Equipment	5	

All actions are described in the following sections:


- *Transferring single product's license customer*
- *Transferring multiple products' licenses to own site*

5.1.1 Transferring single product's license to own site

Use this function to transfer a single product's license to another site owned by the same customer. To transfer a product license to another site:

1. Click **+** to expand the license details. Here, we have expanded the details of **FBN01**, which has 10 available licenses that belong to the **Pune** site.

Figure 33. Expanded license details

	License	Description	Available	
+	BQM20	Twenty Bulk Meter Runs	10	
+	BQM32	Thirty Two Bulk Meter Runs	20	
-	FBN01	FBxNet Communications	10	
Site		Available	Actions	
Pune		10		


2. Click  and select **To Site** from the drop-down menu. The system displays the Transfer selected license to own screen:

Figure 34. Transfer selected license to own site

Transfer selected license to own site

From
Site - Pune

To
Site *

License - FBN01
License Description - FBxNet Communications
License available quantity in site - 10
Quantity To Transfer - ▼ ▲

Remarks

3. Select a site from the **To Site** drop-down list as shown below. This site receives the selected products (here, **Site_test1**).

Figure 35. To Site selected screen

From
Site - Pune

To
Site *

4. Click ▲ or ▼ to increase or decrease the quantity of license(s) to be transferred (here, two FBN01 licenses).

Figure 36. Defining the Product to Transfer

Transfer selected license to own site

From
Site - Pune

To
Site * Site_test1

License - FBN01
License Description - FBxNet Communications
License available quantity in site - 10
Quantity To Transfer - 2

Remarks
Two licenses to be transferred from Pune site to Site_test1

Transfer Cancel

Note

You cannot select more than the available quantity to transfer.

5. After selecting specific quantities of the required licenses, click **Transfer**. The system displays a confirmation screen:

Figure 37. License transfer confirmation

Confirmation

Are you sure you want to transfer items
From : 'Pune'
To : 'Site_test1'?

Yes No

6. Click **Yes** to confirm. The system transfers the specified licenses to the selected site as shown below:

Figure 38. Licenses transferred

FBN01 FBxNet Communications			10
Site	Available	Actions	
Pune	8		
Site_test1	2		

We can see the change in available quantities of the licenses with both sites. Two licenses from the **Pune** site are transferred to **Site_test1**.

Alternatively, you can also select the **Site_test1** site from the **Select Site** drop-down list and check the transferred licenses as shown below:

Figure 39. Product licenses transferred to the selected site

Select Site Site_test1

Export Transfer Multiple

License Name

License	Description	Available
FBN01	FBxNet Communications	2

Site	Available	Actions
Site_test1	2	

5.1.2 Transferring multiple products' licenses to own site

Use this function to transfer multiple product licenses to another site owned by the same customer. To transfer product licenses to another site:

1. Click and select **To Site** from the drop-down menu. The system displays the Transfer multiple licenses to own site screen:

Figure 40. Transfer multiple licenses to own site

The dialog box titled "Transfer multiple licenses to own site" contains the following elements:

- From:** A dropdown menu labeled "Site *" with the text "Select Site" and a downward arrow.
- To:** A dropdown menu labeled "Site *" with the text "Select Site" and a downward arrow.
- Table:** A table with four columns: "License", "License Description", "Available", and "Quantity To Transfer". The table body is currently empty.
- Remarks:** A text input field labeled "Remarks".
- Buttons:** "Transfer" and "Cancel" buttons located at the bottom right.

2. Select sites in both the **From** and **To** drop-down lists as shown below. The licenses get transferred from one site to another (here, from **Pune** to **Site_test1**).

Figure 41. From and To Site Selected screen

This close-up shows the site selection process:

- From:** The dropdown menu is open, and "Pune" is selected.
- To:** The dropdown menu is open, and "Site_test1" is selected.

3. Click ▲ or ▼ to increase or decrease the quantity of license(s) to be transferred (here, three **MTR01** and two **FBN01** licenses).

Figure 42. Selecting the licenses to transfer

License	License Description	Available	Quantity To Transfer
BQM20	Twenty Bulk Meter Runs	10	0
BQM32	Thirty Two Bulk Meter Runs	20	0
FBN01	FBxNet Communications	8	2
MTR01	One Meter Run	41	3
PMENARDOV	Enardo Volume Calculations for ProductionManager Equipment	5	0

Note

You cannot select more than the available quantity to transfer.

- After selecting specific quantities of the licenses, click **Transfer**. The system displays a confirmation screen:

Figure 43. License transfer confirmation

Confirmation

Are you sure you want to transfer items
From : 'Pune'
To : 'Site_test1'?

Yes No

- Click **Yes** to confirm. The system transfers the specified licenses as shown below:

Figure 44. Licenses transferred

- FBN01		FBxNet Communications	10
Site	Available	Actions	
Pune	6		
Site_test1	4		
+ FBNOG		FB3000 Digital Net Oil Computer	9
- MTR01		One Meter Run	41
Site	Available	Actions	
Site_test1	3		
Pune	38		

We can see the change in available quantities of the licenses with both sites. Two licenses of FBN01 and three licenses of MTR01 are transferred from **Pune** site to **Site_test1**.

Alternatively, you can also select the **Site_test1** site from the **Select Site** drop-down list and check the transferred licenses as shown below:

Figure 45. Product licenses transferred to the selected site

Select Site	Site_test1	
Export	Transfer Multiple	
License Name		
<input type="text"/>		
License	Description	Available
+ FBN01	FBxNet Communications	4
+ MTR01	One Meter Run	3

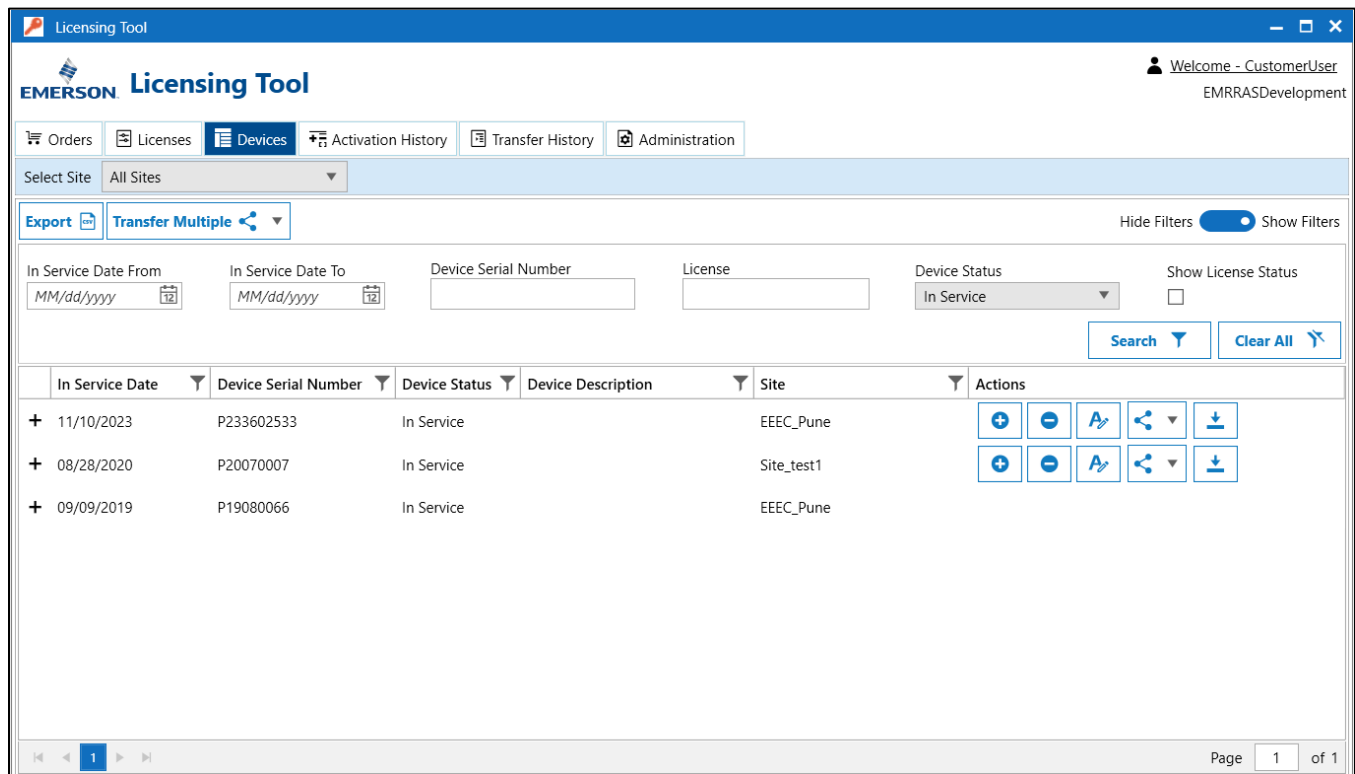
Section 6: Working with devices

Select the **Devices** tab to list all available devices and manage (add, transfer, download, and revoke) products for those devices.

Note

When shipped from manufacturing, each product has one CTL01 product installed. Add more products as appropriate.

Figure 46. Device listing



Note

If the logged-in user ID does not have the necessary rights on the device(s) at a particular site, no action can be taken on that device. For example, the user cannot perform any actions on the **P19080066** device shown in the screen above. Rights on individual sites are governed by the site roles, as described in [Creating a new user](#).

All device-related actions are described in the following sections:

- [Adding a new license to a device](#)
- [Editing device description](#)
- [Transferring a device to own site](#)

- *Transferring multiple devices to own sites*
- *Downloading the device license file*
- *Revoking a product license*

6.1.1 Adding a new license to a device

To add a new product to a device:

1. Select a site from the drop-down list. The system filters records according to the selected site. For example, selecting **Site_test1** lists all the devices that belong to the **Site_test1** site, as shown below:

Figure 47. Devices filtered by site (Site_test1)

In Service Date	Device Serial Number	Device Status	Device Description	Site	Actions
08/28/2020	P20070007	In Service		Site_test1	[+] [-] [A] [Share] [Download]

2. Click **+** to display the details of the device (here, **P20070007**) as shown below:

Figure 48. License details of device

In Service Date	Device Serial Number	Device Status	Device Description	Site	Actions
08/28/2020	P20070007	In Service		Site_test1	[+] [-] [A] [Share] [Download]
License	Description	Activated Quantity			
GSLQ4	Gas Calcs + Liquid Calcs - includes 4 Mtr Runs (BQM04)	1			
MTR01	One Meter Run	4			
FBNOG	FB3000 Digital Net Oil Computer	1			
SC04	FBxStation Control	1			
CTL01	Base Control-PID, Action Blocks, Math Blocks, Effects	1			

In the image above, device **P20070007** has multiple activated licenses. We can activate more licenses for this device.


3. Click  to activate more licenses for this device. The system displays the Add license to device screen:

Figure 49. Add license to device screen

License	Device activated	Available	Quantity to activate
FBN01	0	4	0
MTR01	4	3	0

4. Click ▲ or ▼ to increase or decrease the quantity of each license for the device. For example, in the screen below we have increased the quantities of the licenses FBN01 and MTR01 for activation:

Figure 50. Licenses to be Added to Device

License	Device activated	Available	Quantity to activate
FBN01	0	4	2
MTR01	4	3	1

Note:

The system prevents you from selecting more than the available product quantity.

- After selecting specific quantities of the required products, click **Complete Activation**. The system displays a confirmation screen:

Figure 51. Confirmation of activated licenses

Confirmation

Are you sure you want to activate selected licenses on site Site_test1?

Yes No

- Click **Yes**. The system displays a message about successful activation and allows you to directly download the License file into your system.

- Now, the system activates the selected licenses and displays the increased activated quantities of the selected licenses as shown below:

Figure 52. Summary of activated products on device

License	Description	Activated Quantity
GSLQ4	Gas Calcs + Liquid Calcs - includes 4 Mtr Runs (BQM04)	1
FBN01	FBxNet Communications	2
MTR01	One Meter Run	5
FBNOG	FB3000 Digital Net Oil Computer	1
SC04	FBxStation Control	1
CTL01	Base Control-PID, Action Blocks, Math Blocks, Effects	1

6.1.2 Editing device description

To edit the description of a device:


- Select a device from the list of devices and click the  icon. The system displays the Edit device description screen:

Figure 53. Edit device description

Device Serial Number P233602533

Description

Save Cancel

- Make the required changes and click **Save**. The system updates the device details.

6.1.3 Transferring a device to own site



Important

Transferring devices requires **administrative** privileges.

Use this function to transfer a device to another site owned by the same customer. Any associated license transfers with the device when it is transferred from one site to another.

To transfer a device between sites:












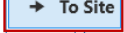






1. Select a device from the list of available devices (here, device serial number **P233602533**).
2. The selected device currently belongs to the **EEC_Pune** site. Click  to view the transfer options:

Figure 54. Transfer options (To Site)

	In Service Date	Device Serial Number	Device Status	Device Description	Site	Actions
	11/10/2023	P233602533	In Service		EEEC_Pune	    
	08/28/2020	P20070007	In Service		Site_test1	   
	09/09/2019	P19080066	In Service		EEEC_Pune	    

3. Select **To Site** option as shown above. The system displays the Transfer Device to Own Site screen:

Figure 55. Transfer selected device to own site screen

Transfer selected device to own site
✕

From
Site - EEEEC_Pune

To
Site *

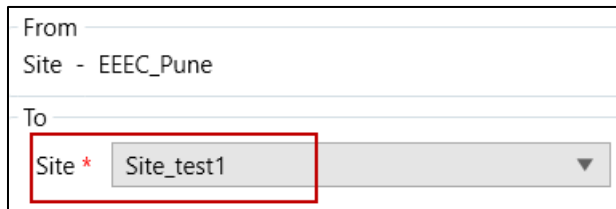
Device
Serial Number - P233602533 In Service Date - 11/10/2023 5:30 AM
Description -

Activated License	License Description	Activated Quantity
CTL01	Base Control-PID, Action Blocks, Math Blocks, Effects	1
BQM20	Twenty Bulk Meter Runs	1
GSLQ4	Gas Calcs + Liquid Calcs - includes 4 Mtr Runs (BQM04)	1

Remarks

4. The licenses belonging to the selected device by default appear as shown in the above screen.
5. Select a site from the **To Site** drop-down list (here, **Site_test1**). This is the site where the selected devices need to be transferred:

Figure 56. Site selected for transfer

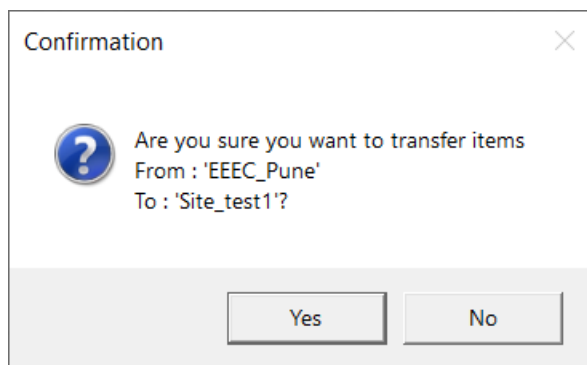


From
Site - EEEEC_Pune

To
Site * Site_test1

6. Add relevant descriptive remarks in the **Remarks** text box.
7. Click **Transfer**. The system displays a confirmation screen:

Figure 57. Confirmation


















Confirmation

Are you sure you want to transfer items
From : 'EEEC_Pune'
To : 'Site_test1'?

Yes No

8. Click **Yes**. The system transfers the selected device. (Here, device **P233602533**) is transferred from site **EEEC_Pune** to **Site_test1** as shown below.

Figure 58. Transferred device listing

	In Service Date	Device Serial Number	Device Status	Device Description	Site	Actions
+	11/10/2023	P233602533	In Service		Site_test1	    
+	08/28/2020	P20070007	In Service		Site_test1	    
+	09/09/2019	P19080066	In Service		EEEC_Pune	    

6.1.4 Transferring multiple devices to own sites

Use this function to transfer multiple devices from one site to another, both sites being owned by the same customer. To transfer devices between sites:


1. Click  and select **To Site** option. The system displays the Transfer multiple licenses to own site screen:

Figure 59. Transfer multiple devices to own site

The dialog box is titled "Transfer multiple devices to own site". It contains the following elements:

- From:** A dropdown menu labeled "Site *" with the text "Select Site".
- To:** A dropdown menu labeled "Site *" with the text "Select Site".
- Devices available in site:** A table with columns "Serial Number" and "Description".
- Devices selected for transfer:** A table with columns "Serial Number" and "Description".
- Remarks:** A text input field.
- Buttons:** "Transfer" and "Cancel" buttons at the bottom right.

2. Select **From** and **To Site** from the list of available options.

Figure 60. Selected sites

This screenshot shows the "From" and "To" site selection dropdowns. The "From" dropdown is set to "EEEEC_Pune" and the "To" dropdown is set to "Site_test1".

3. The devices belonging to the selected **From** site by default appear under **Devices available in site**.

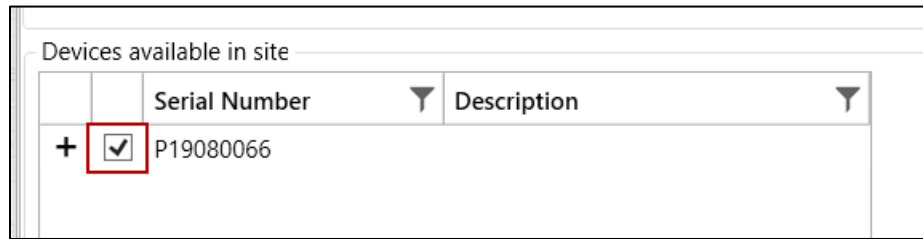
Figure 61. Devices available in site

This screenshot shows the "Devices available in site" table. It contains one row with the following data:

	Serial Number	Description
<input type="checkbox"/>	P19080066	

4. Select the device(s) to be transferred to the selected site, as shown below:

Figure 62. Device selected for transfer




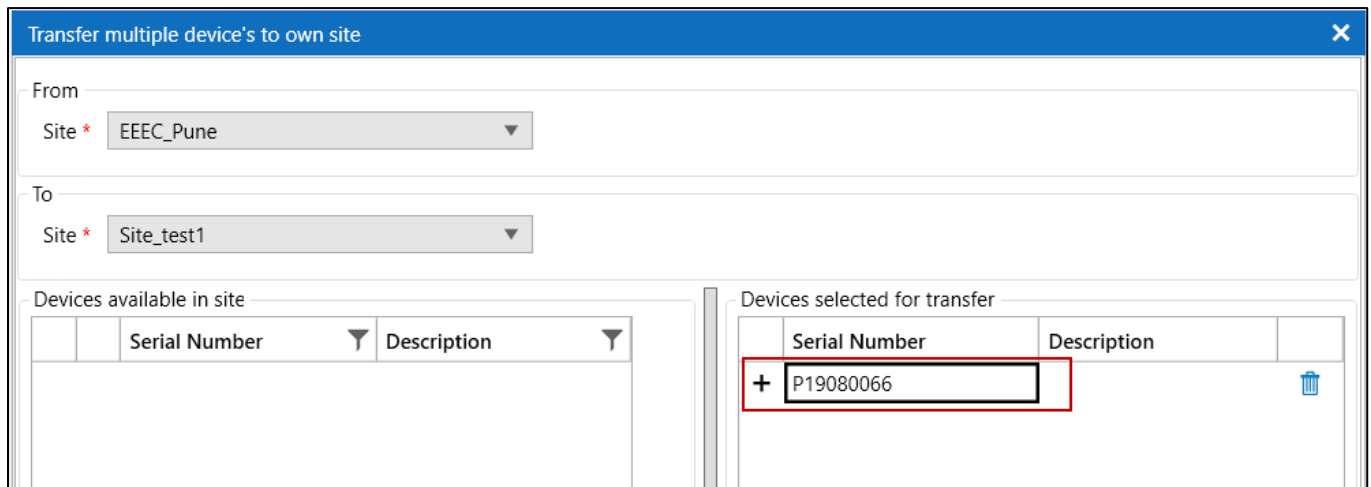
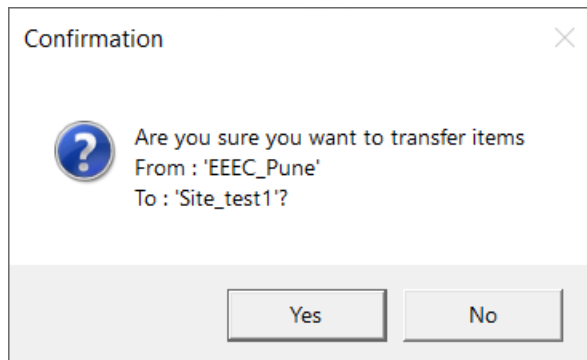
5. Click  icon. The selected device moves to the **Devices selected for transfer** column, as shown below:

Figure 63. Transferred devices



6. Add relevant descriptive remarks in the **Remarks** text box.
7. Click **Transfer**. The system displays a confirmation screen:

Figure 64. Confirmation



- Click **Yes**. The system transfers the selected device (Td5555-Test, Td12-7_Test, Td1234_Test) from site **EEEE_Pune** to **Site_test1** as shown below.

Figure 65. Transferred device listing

	In Service Date	Device Serial Number	Device Status	Device Description	Site	Actions
+	11/10/2023	P233602533	In Service		Site_test1	[+] [-] [A] [Share] [Download]
+	08/28/2020	P20070007	In Service		Site_test1	[+] [-] [A] [Share] [Download]
+	09/09/2019	P19080066	In Service		Site_test1	[+] [-] [A] [Share] [Download]

6.1.5 Downloading the device license file

Use this functionality to download the device license file on your system.

Selecting the **Show License status** check box to view the current download status of the license file.

Figure 66. Download device license

In Service Date From	In Service Date To	Device Serial Number	License	Device Status	Show License Status	License Status	
MM/dd/yyyy	MM/dd/yyyy			In Service	<input checked="" type="checkbox"/>	All	
[Search] [Clear All]							
	In Service Date	Device Serial Number	Device Status	Device Description	Site	License Status	Actions
+	09/12/2024	P2024120915	In Service	Partner site 1		Downloaded	[+] [-] [A] [Share] [Download]
+	09/12/2024	P202412093	In Service	Partner site 1		Download Pending	[+] [-] [A] [Share] [Download]
+	09/12/2024	P2024120913	In Service	Warehouse		Download Pending	[+] [-] [A] [Share] [Download]

Any of the following statuses is possible –

- Downloaded** – The file is already downloaded on the system.
- Download pending** – The file is yet to be downloaded on the system
- Latest** – The file has already been transferred to the device.

To download a license file:


- Select a device from the list of devices and click the  icon.

Figure 67. Download device license

	In Service Date	Device Serial Number	Device Status	Device Description	Site	Actions
+	11/10/2023	P233602533	In Service		Site_test1	[+] [-] [A] [Share] [Download]

The system displays the window to browse the location where the file needs to be saved.

2. Enter a meaningful name of the file and click Save.

Now, log in to the FBxConnect application to transfer this file to the required device.

For details, refer to the **FBxConnect help file**.

6.1.6 Revoking a product license

Use this function to revoke the activated product licenses of a selected device. The revoked quantity gets added to the device's available license quantity.
















Scenarios that may require license revocation include:

- When a user wishes to transfer the licenses to alternate devices
- If a license was inadvertently assigned to the incorrect device
- In cases where the device is experiencing problems, necessitating the removal of its licenses so they can be reassigned to a different device.

To revoke a license:

1. Select a device from the list of available devices:

Figure 68. Device listing

	In Service Date	Device Serial Number	Device Status	Device Description	Site	Actions
+	11/10/2023	P233602533	In Service		Site_test1	    
+	08/28/2020	P20070007	In Service		Site_test1	    
+	09/09/2019	P19080066	In Service		Site_test1	    


2. Click  to revoke the license of the selected device. System displays the Revoke license screen:

Figure 69. Revoke license

Revoke License
✕

Device Serial Number P19080066

Company EMRRASDevelopment

Site Site~~t~~est1

Full Revoke

License	Device activated	Quantity To Revoke
CTL01	1	0 ▼ ▲
BQM20	1	0 ▼ ▲
GSAL4	1	0 ▼ ▲

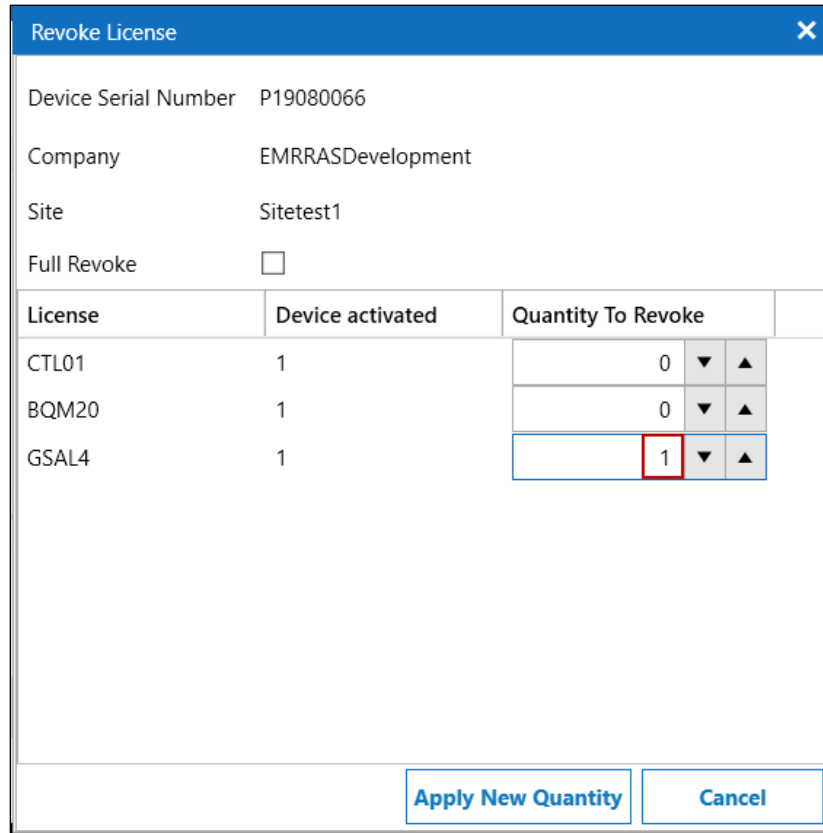
Apply New Quantity
Cancel

3. Click ▲ or ▼ to increase or decrease the quantity of licenses to be revoked. For example, one license of **GSAL4** needs to be revoked.

Notes

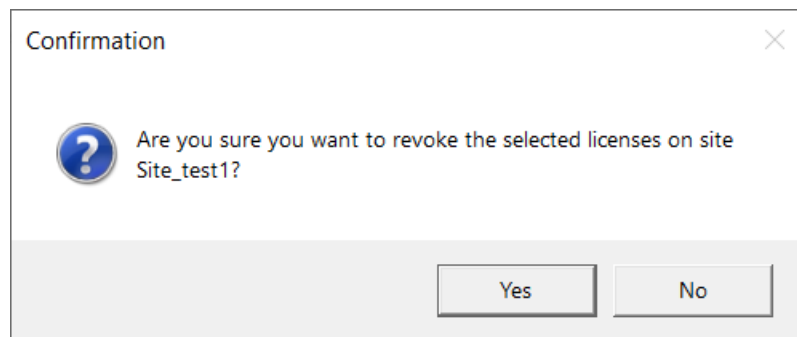
- You cannot select more than the available license quantity.
- To revoke all the licenses at once, select the **Full Revoke** check box. All the activated licenses appear in the **Quantity to Revoke** column.

Figure 70. Select quantity to revoke



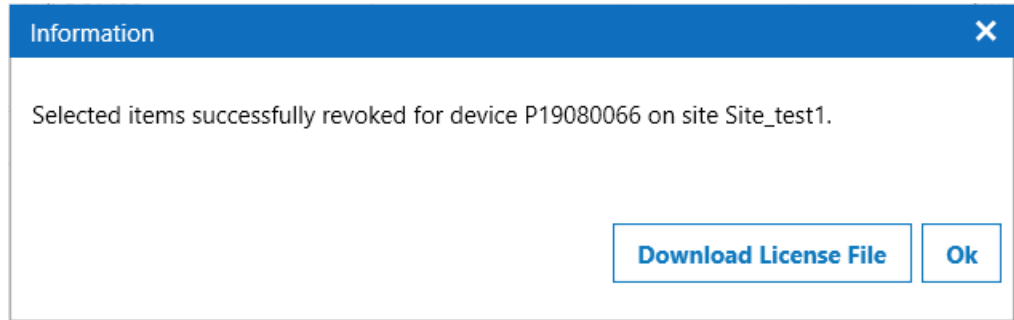
4. Click **Apply New Quantity** after specifying the quantity of licenses to revoke. The system displays a confirmation screen:

Figure 71. Revocation confirmation



5. Click **Yes** to confirm. The system displays a success message. Click **Download License File** to download the updated license file else click OK.

Figure 72. Revocation confirmation



- 6. The system revokes the specified number of licenses.

In the below image, we can see that after revoking the only license of GSAL4. It has been removed from the list of activated licenses.

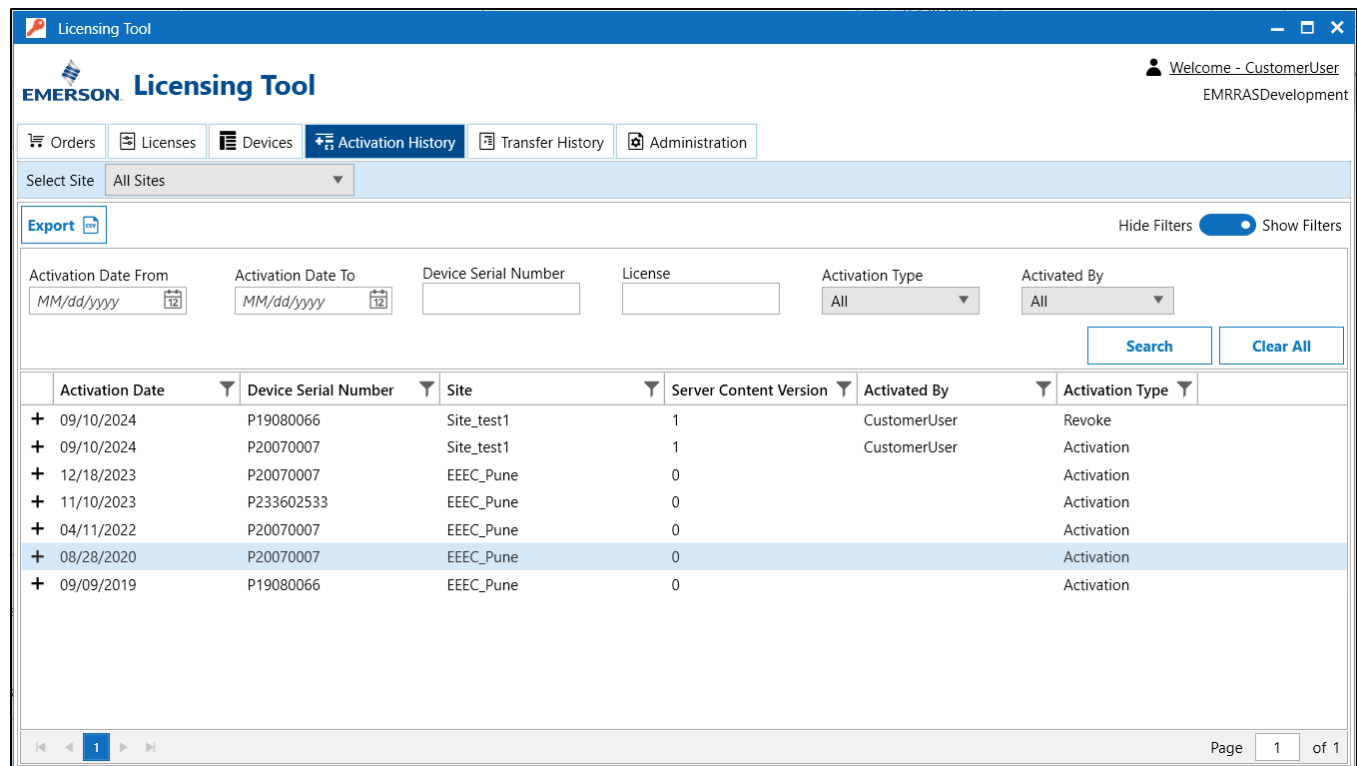
Figure 73. Updated license list

License	Description	Activated Quantity
CTL01	Base Control-PID, Action Blocks, Math Blocks, Effects	1
BQM20	Twenty Bulk Meter Runs	1

Section 7: Viewing the activations history

Use the **Activation History** tab to view the history of licenses already activated on a device. This tab is read-only.

Figure 74. Viewing the activations history



To view activation history details:

Click **+** to expand the details. The system displays a list of all the activated licenses corresponding to the selected device along with the available quantity of each license. An example screen is shown below:

Figure 75. Viewing the history of the activation

Activation Date	Device Serial Number	Site	Server Content Version	Activated By	Activation Type
+ 09/10/2024	P19080066	Site_test1	1	CustomerUser	Revoke
- 09/10/2024	P20070007	Site_test1	1	CustomerUser	Activation
License	Description	Quantity			
FBN01	FBxNet Communications	2			
MTR01	One Meter Run	1			

Section 8: Viewing the transfer history

Use the **Transfer History** tab to view the details of transfers for the partner. It lists all line items with the product name, quantity, and remarks. Remarks are very useful for analysis purposes.

Figure 76. Transfer history

Date	Transfer Type	Entity	Site	Entity	Site	Order	PO#	Line#	License	Quantity	Device	Transferred By	Remarks
09/10/2024	Internal	EMRRASDevelopment	EEEC_Pune	EMRRASDevelopment	Site_test1				GSAL4	1	P19080066	CustomerUser	Transferring device to test site
09/10/2024	Internal	EMRRASDevelopment	EEEC_Pune	EMRRASDevelopment	Site_test1				BQM20	1	P19080066	CustomerUser	Transferring device to test site
09/10/2024	Internal	EMRRASDevelopment	EEEC_Pune	EMRRASDevelopment	Site_test1				CTL01	1	P19080066	CustomerUser	Transferring device to test site
09/10/2024	Internal	EMRRASDevelopment	EEEC_Pune	EMRRASDevelopment	Site_test1				GSLQ4	1	P233602533	CustomerUser	
09/10/2024	Internal	EMRRASDevelopment	EEEC_Pune	EMRRASDevelopment	Site_test1				BQM20	1	P233602533	CustomerUser	
09/10/2024	Internal	EMRRASDevelopment	EEEC_Pune	EMRRASDevelopment	Site_test1				CTL01	1	P233602533	CustomerUser	
09/10/2024	Internal	EMRRASDevelopment	Pune	EMRRASDevelopment	Site_test1				GSLQ4	1	P20070007	CustomerUser	
09/10/2024	Internal	EMRRASDevelopment	Pune	EMRRASDevelopment	Site_test1				FBNOC	1	P20070007	CustomerUser	
09/10/2024	Internal	EMRRASDevelopment	Pune	EMRRASDevelopment	Site_test1				SC04	1	P20070007	CustomerUser	
09/10/2024	External	Development-ETS	Warehouse	EMRRASDevelopment	EEEC_Pune				CTL01	1	P20070007	CustomerUser	

The **Transferred by** column identifies who performed each transfer. Each line details the specifics of those transfers. For example, the screen above has two highlighted transfers:

- The first is an **Internal** transfer of one GSAL4 license, which is transferred from the **EEEC_Pune** site to the **Site_test1** site of the same customer. The product is transferred from one site to another, both of which were owned by the same customer.
- The second one is an **External** transfer of one CTL01 product, is transferred from the **Warehouse** site of **Development-ETS** to the site **EEEC_Pune** of **EMREASDevelopment**. The product is transferred from a partner to a customer.

Additionally, you can use the filtering options on this listing to refine the display.

Section 9: Appendix A: Exporting data

Customers can export the data on most of the tabs in the application.

To export data:

1. Click **Export** on the extreme right under the available tabs.
2. Enter the **File name** and **Location**.
3. Click **Save**.
4. Navigate to the file location, open the CSV file, and review the entries. Additionally, you can export the data after applying filters based on your search criteria. When you do this, only the filtered content is included in the exported results.

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