

# **ecoSYS**

## **Site Supervisor**

# **Setup & Configuration I**

Education You Can Build On



***Presented By:***

**(Instructor Name)**



# ***Housekeeping***

- Smile Card
- No Smoking
- Class Length
- Portable Phones and Beepers
- Rest Rooms
- Fire Safety



# ***Course Reference Materials***

- Participant Manual
- *ecoSYS Site Supervisor Controller User Guide*
- *ecoSYS Site Supervisor Quick Setup Guide*

# ***Course Agenda***

- ecoSYS Site Supervisor Navigation
- Basic System Configuration (Setup Role-Based User Access, Personal Profile)
- Adding & Commissioning a Device
- Alarm Configuration & Transmission



# ecoSYS Site Supervisor Navigation

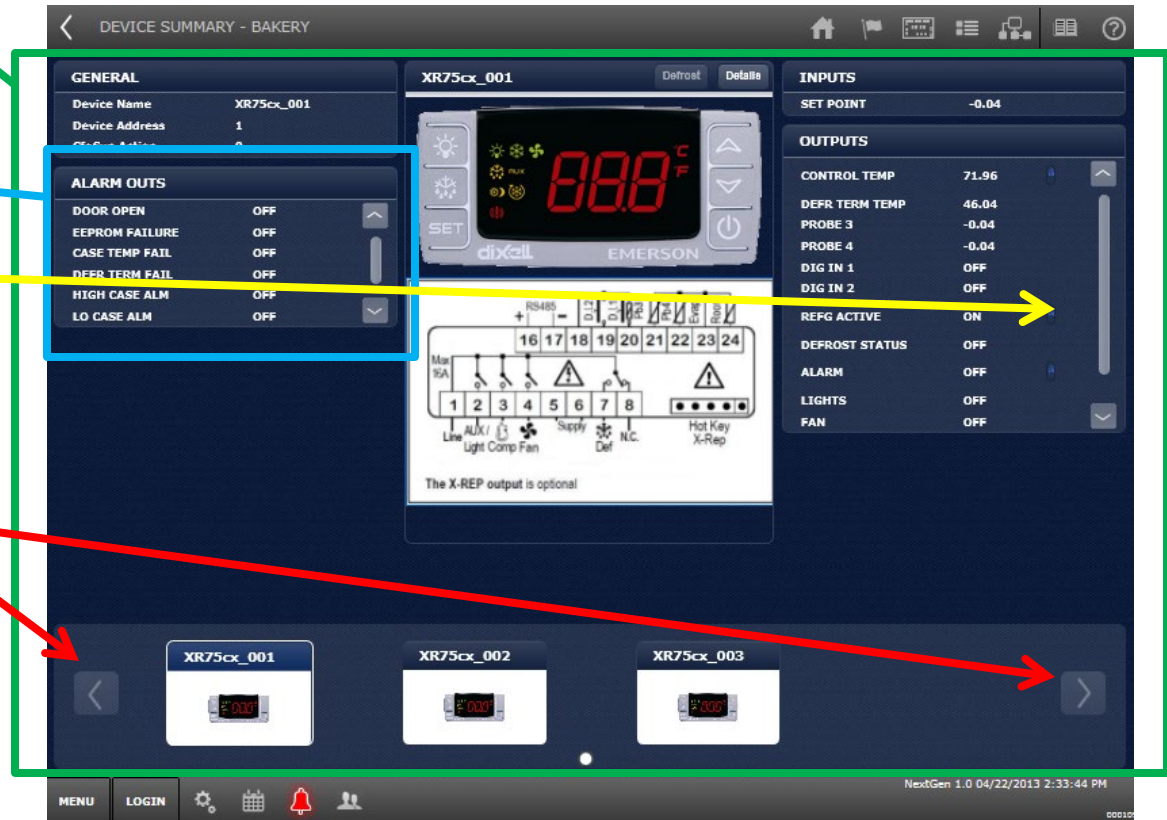
Education You Can Build On





# Basic Screen Elements

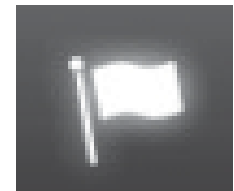
- Main Display
- Panels
- Slider/Scroll Bar
- Back and Forward Buttons





# *Top of the Screen – Buttons and Icons*

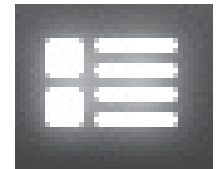
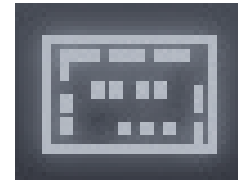
- Back – takes you to the previously viewed page
- Home – takes you to the primary (default) dashboard
- Flag icon – takes you to a screen where you can set preferred language, localization parameters, time and date formats





# *Top of the Screen – Buttons and Icons*

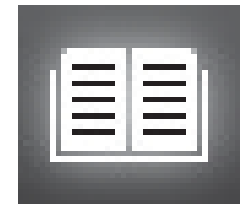
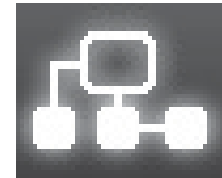
- Floorplan icon – takes you to the floorplan screen, displaying site's physical layout and location of devices
- Site map – takes you to the Site map screen, which allows you to navigate quickly to any content area





# *Top of the Screen – Buttons and Icons*

- System view – takes you to an overview of the applications that have been set up, network summary, and filtering options
- General Help – takes you to the General Help screen where you can search for a Help topic by entering text





# ***Top of the Screen – Buttons and Icons***

- Settings (question mark icon) – takes you to the current page's contextual help, which displays information about the elements on the current page





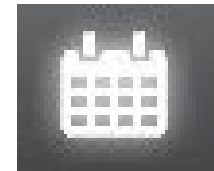
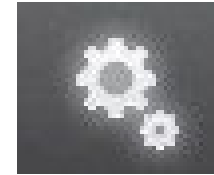
# ***Bottom of the Screen – Buttons and Icons***

- Menu – opens the stepwise menu showing all available content in the system; unavailable areas appear disabled
- Login/Logout - allows you to login to the system using your credentials; toggles to Logout once you have logged in



# ***Bottom of the Screen – Buttons and Icons***

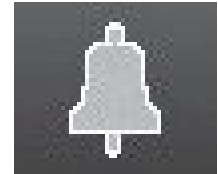
- Settings (gear icon) – allows you to set or edit your personal profile page
- Scheduler – takes you to page where the system can be configured to perform operations on specific days/times





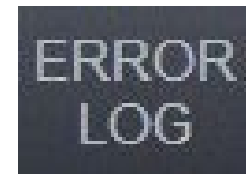
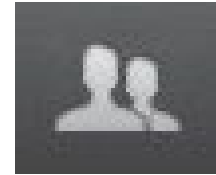
# ***Bottom of the Screen – Buttons and Icons***

- Alarms – takes you to page where you can view, sort, change active alarms, notices, and alarm history; appears red if active alarm is present



# ***Bottom of the Screen – Buttons and Icons***

- Active logins – shows you information on users currently logged into the system
- Error Log – opens a pop-up box displaying all system logs





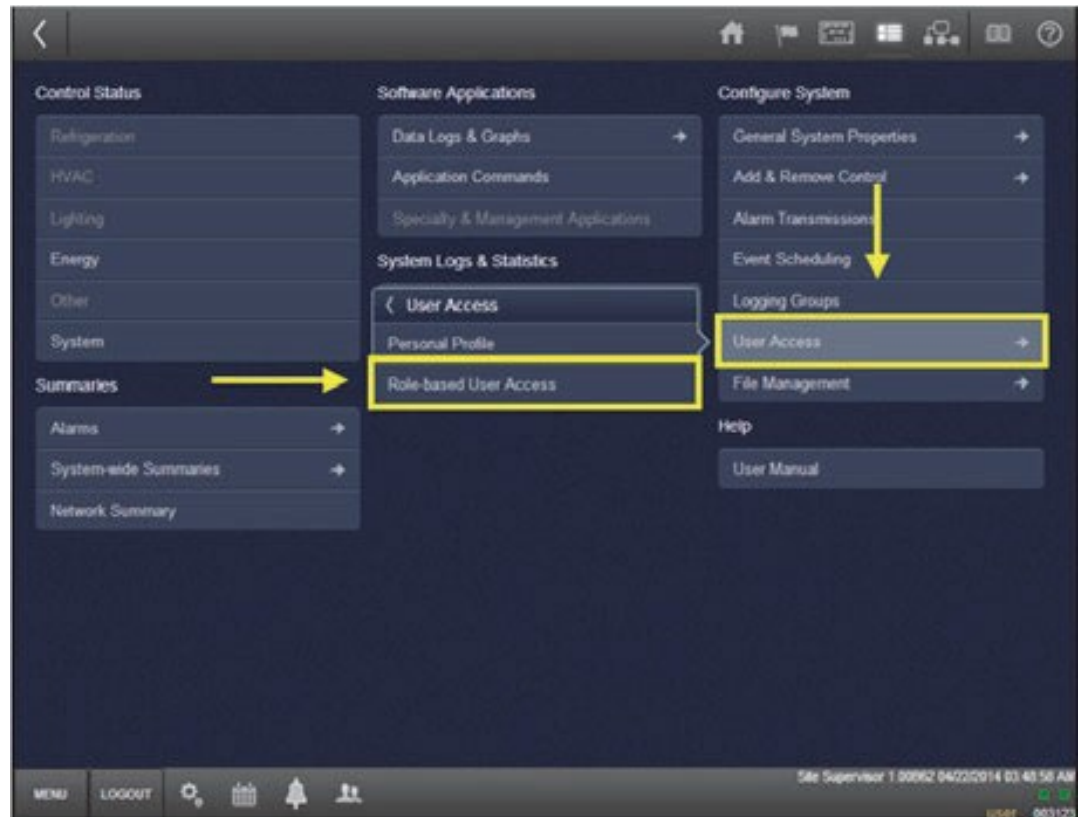
# Basic System Configuration

Education You Can Build On



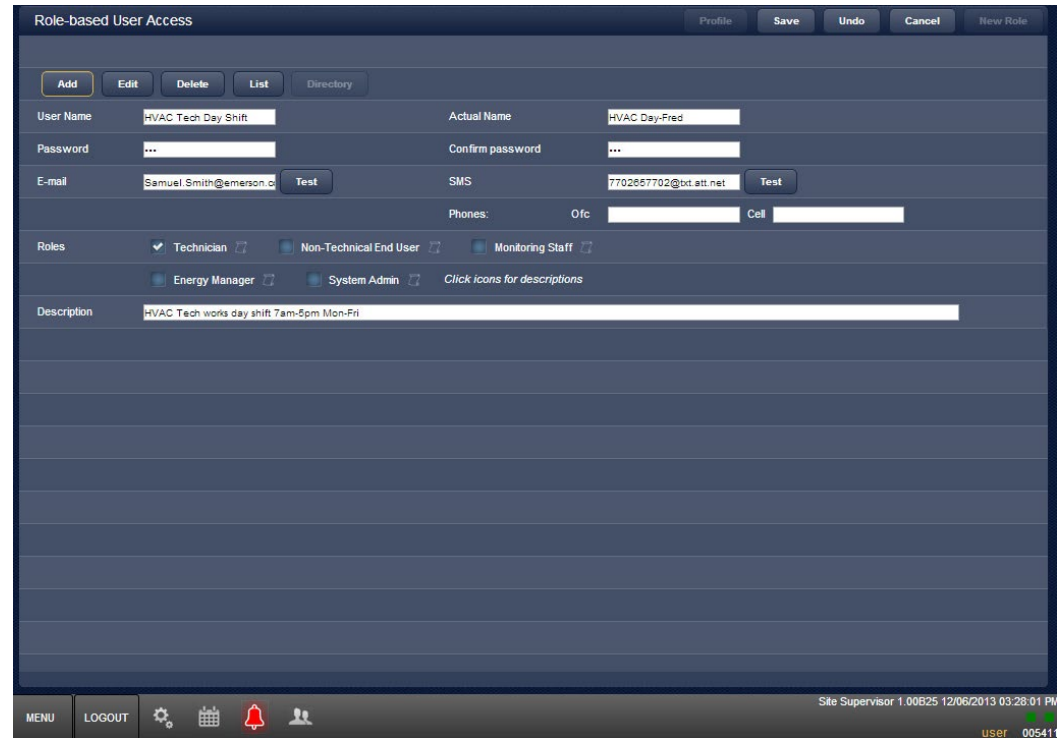
# Set Up Role-Based User Access

- Login to Site Supervisor and go to **Site Map**.
- Under Configure System, click on **User Access**, then **Role-Based User Access**.



# Set Up Role-Based User Access

- Select **Add**. (If making changes to existing user access, choose **Edit**.)
- If you are adding a user, you will need to complete all required fields.
- In the Role area, check the role(s) you wish to assign to the user.



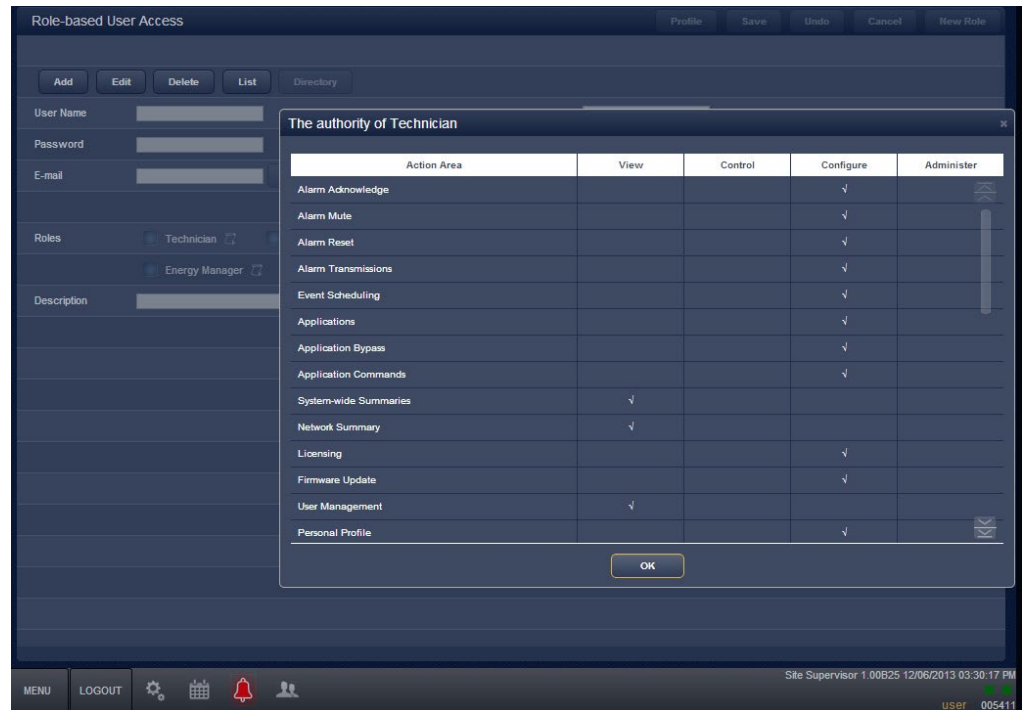
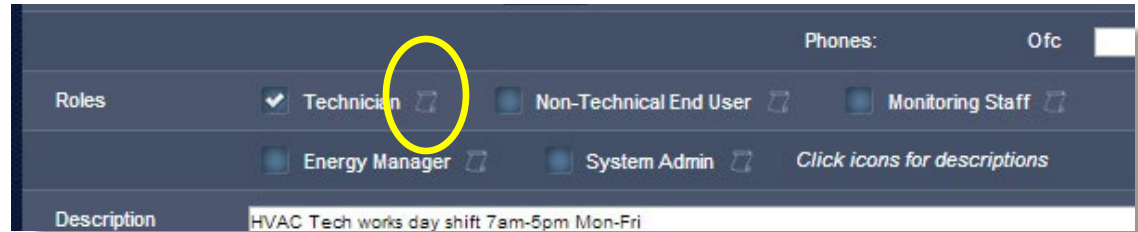
The screenshot displays the 'Role-based User Access' management interface. At the top, there are buttons for 'Profile', 'Save', 'Undo', 'Cancel', and 'New Role'. Below this, a navigation bar includes 'Add', 'Edit', 'Delete', 'List', and 'Directory'. The main form contains the following fields and options:

- User Name:** HVAC Tech Day Shift
- Actual Name:** HVAC Day-Fred
- Password:** [Redacted]
- Confirm password:** [Redacted]
- E-mail:** Samuel.Smith@emerson.com (with a 'Test' button)
- SMS:** 7702857702@att.net (with a 'Test' button)
- Phones:** Ofc [Redacted], Cel [Redacted]
- Roles:** A list of roles with checkboxes:  Technician,  Non-Technical End User,  Monitoring Staff,  Energy Manager, and  System Admin. A link 'Click icons for descriptions' is also present.
- Description:** HVAC Tech works day shift 7am-5pm Mon-Fri

The bottom of the interface features a 'MENU' button, a 'LOGOUT' button, and a status bar showing 'Site Supervisor 1.00825 12/06/2013 03:28:01 PM' and 'user 00541'.

# Set Up Role-Based User Access

- For description of the authority associated with a role, click on the information icon next to the role name.



# Set Up Role-Based User Access

- When finished, click **Save**.

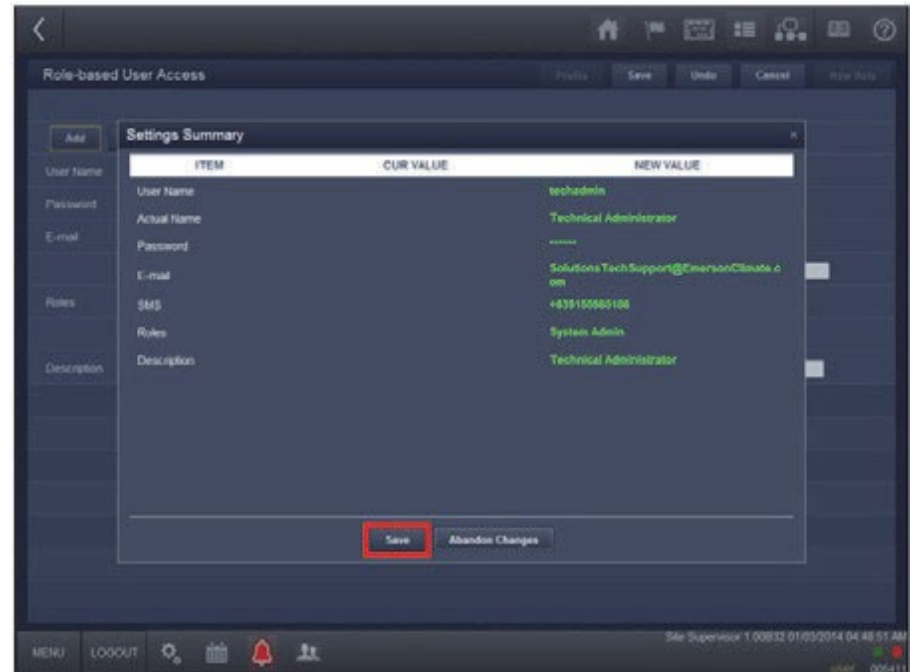
The screenshot shows a web-based configuration interface for 'Role-based User Access'. The interface is dark-themed and contains the following elements:

- Header:** 'Role-based User Access' with buttons for 'Profile', 'Save', 'Undo', 'Cancel', and 'New Role'.
- Navigation:** A row of buttons: 'Add', 'Edit', 'Delete', 'List', and 'Directory'.
- User Information:**
  - User Name: HVAC Tech Day Shift
  - Actual Name: HVAC Day-Fred
  - Password: [Redacted]
  - Confirm password: [Redacted]
  - E-mail: Samuel.Smith@emerson.c... with a 'Test' button.
  - SMS: 7702857702@txt.att.net with a 'Test' button.
  - Phones: Ofc [Redacted] Cell [Redacted]
- Roles:** A list of roles with checkboxes:
  - Technician
  - Non-Technical End User
  - Monitoring Staff
  - Energy Manager
  - System AdminA link 'Click icons for descriptions' is also present.
- Description:** HVAC Tech works day shift 7am-5pm Mon-Fri

The bottom of the interface features a dark footer with a 'MENU' button, a 'LOGOUT' button, and several icons (gear, calendar, bell, people). On the right side of the footer, it displays 'Site Supervisor 1.00B25 12/06/2013 03:28:01 PM' and 'user 005411'.

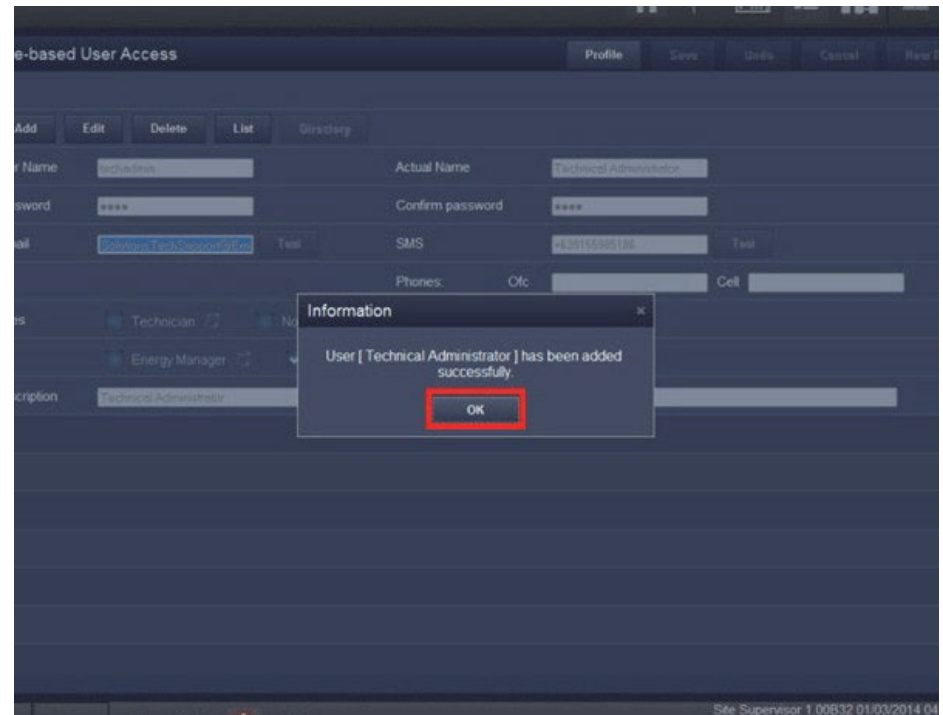
# Set Up Role-Based User Access

- A confirmation screen will open displaying a summary. Review and if correct, click **Save**. If not, click **Abandon Changes**.



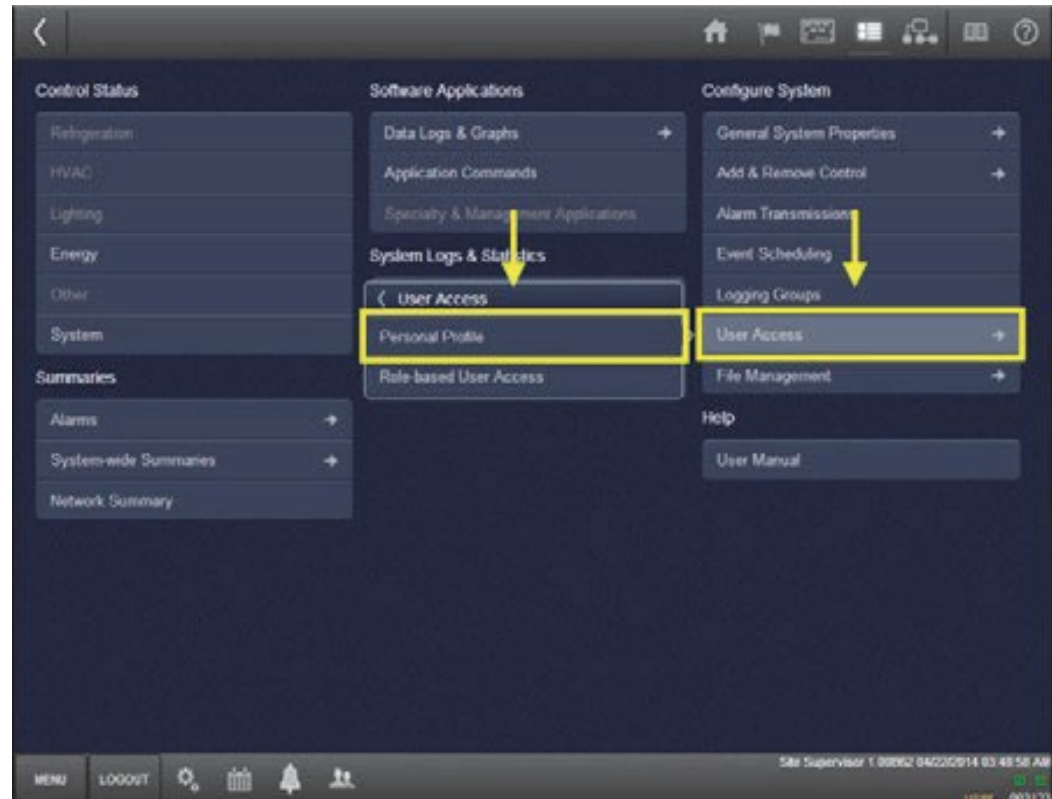
# Set Up Role-Based User Access

- After you click Save, the new user just created is added to the list of users. Click on **OK**.



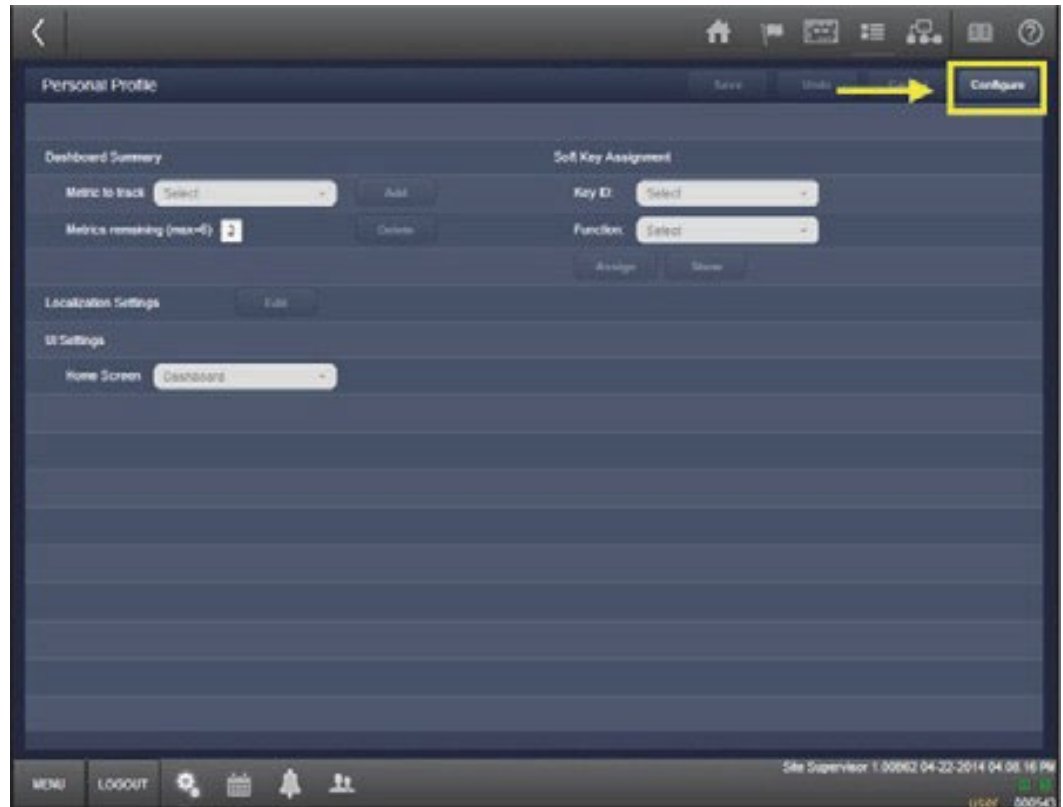
# Set Up Personal Profile

- Login to Site Supervisor and go to **Site Map**.
- Select User Access, then **Personal Profile**.



# Set Up Personal Profile

- Select **Configure**.



# Set Up Personal Profile

- Enter necessary information for parameters:
  - Dashboard summary (metric(s) displayed in Dashboard Summary column)
  - Soft Key assignment
  - UI Settings (sets what is displayed on Home Screen)
- Click **Save**.

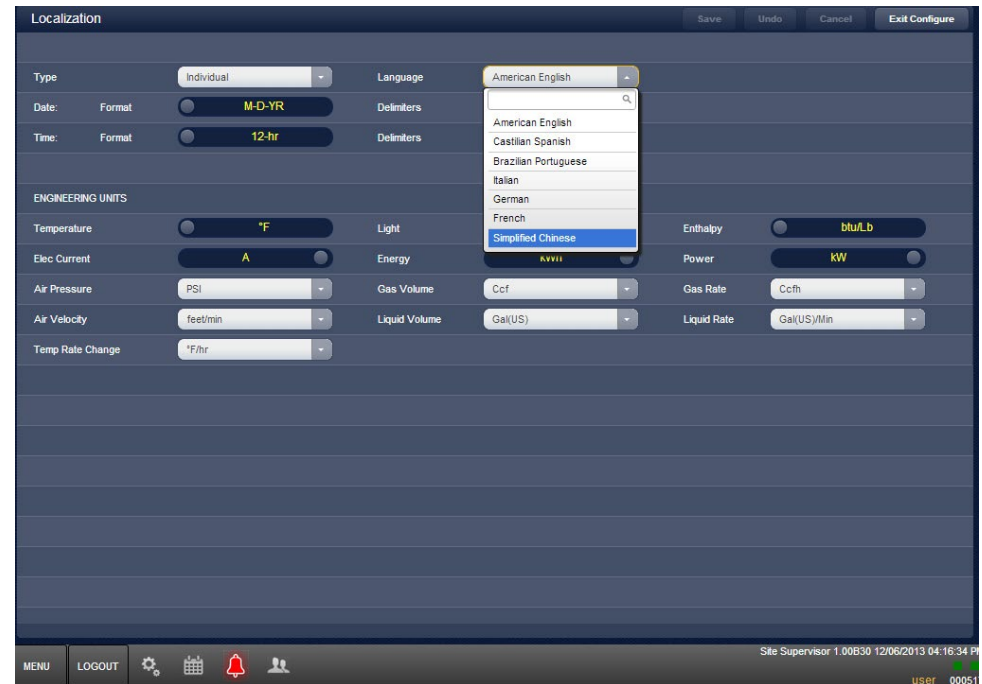
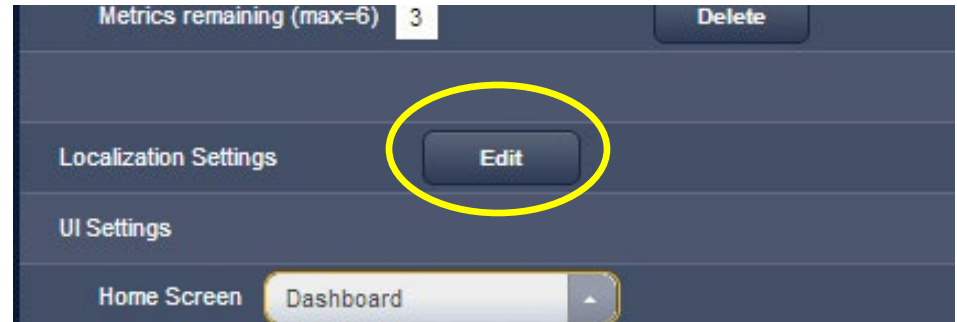
The screenshot shows the 'Personal Profile' configuration interface. At the top right, there are buttons for 'Save', 'Undo', 'Cancel', and 'Exit Configure'. The interface is divided into several sections:

- Dashboard Summary:** Includes a 'Metric to track' dropdown menu, an 'Add' button, and a 'Metrics remaining (max=6)' field with the value '3' and a 'Delete' button.
- Soft Key Assignment:** Includes a 'Key ID' dropdown menu, a 'Function' dropdown menu, and 'Assign' and 'show' buttons.
- Localization Settings:** Includes an 'Edit' button.
- UI Settings:** Includes a 'Home Screen' dropdown menu with a search icon. A dropdown list is open, showing options: 'Dashboard', 'Floorplan', and 'Site Summary'. 'Dashboard' is currently selected.

At the bottom of the screen, there is a navigation bar with icons for 'MENU', 'LOGOUT', a gear icon, a calendar icon, a bell icon, and a person icon. The bottom right corner displays the text 'Site Supervisor 1.00B30 12/06/2013 04:15:21 PM' and 'user 00054'.

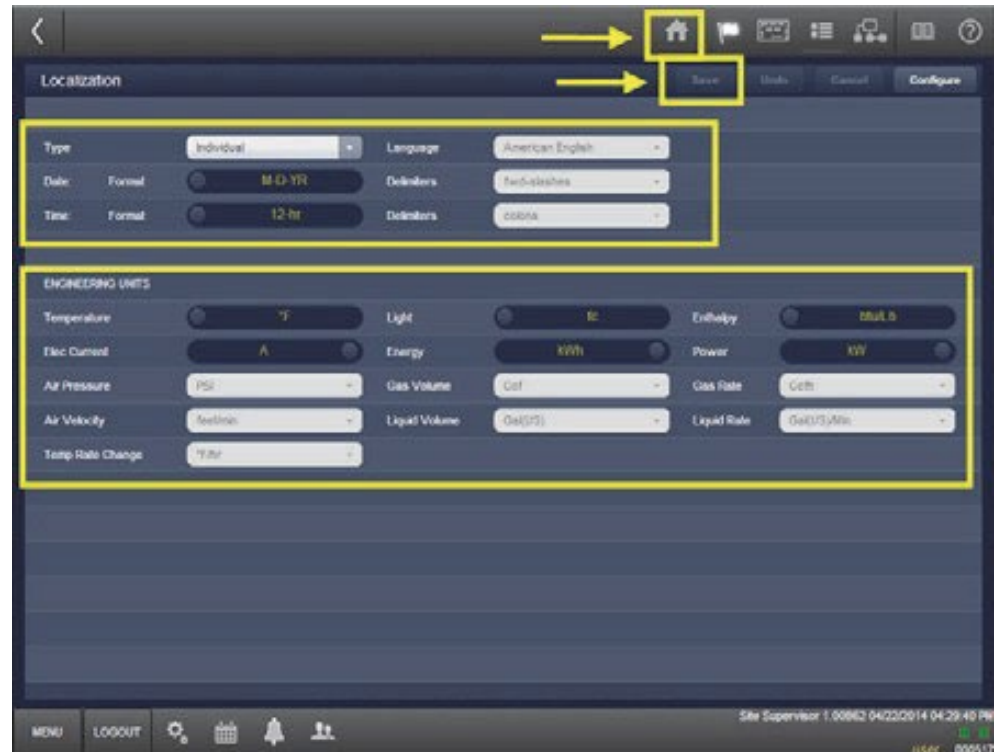
# Set Up Personal Profile

- Click **Edit** beside Localization Settings to change language, engineering units, and date and time formats.



# Set Up Personal Profile

- After setting parameters, select **Save**, then click the Home icon to exit the screen.





# Adding and Commissioning a Device

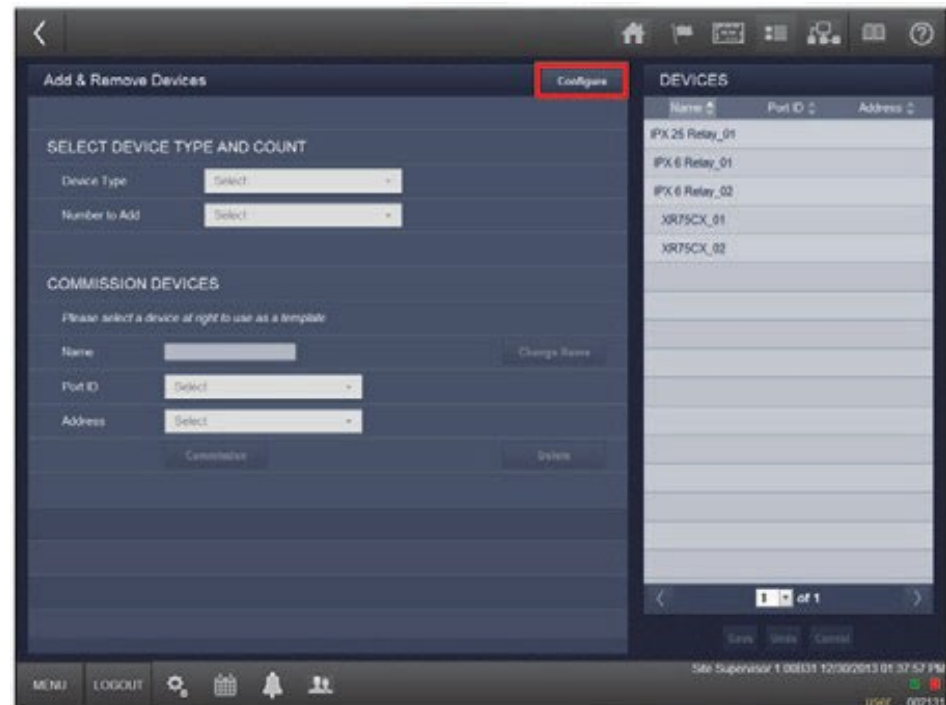
Education You Can Build On



# Add a Device

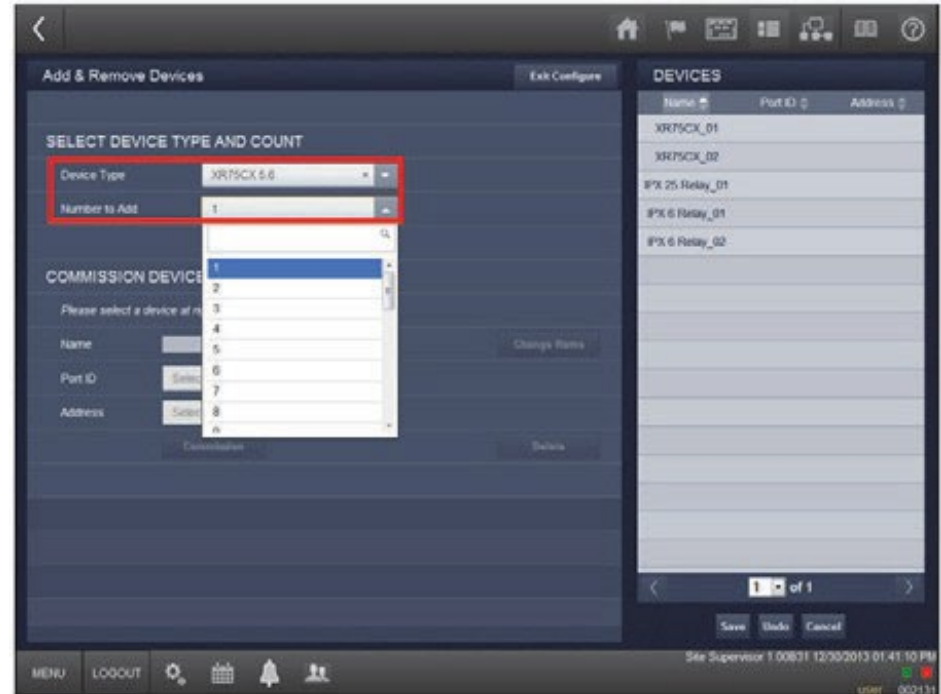
- Use the **Menu** or **Site Map** button.
- Click **Configure** to modify device settings.

*Configure System > Add & Remove Control > Devices*



# Add a Device

- Select the **Device Type** from the dropdown list.
- Select the number of devices from the **Number to Add** dropdown.



# Add a Device

- Select **Exit Configure** to save the settings

**Add & Remove Devices** Exit Configure

**SELECT DEVICE TYPE AND COUNT**

Device Type: XR75CX 5.6  
Number to Add: 1

**COMMISSION DEVICES**

Please select a device at right to use as a template

Name:  Change Name

Part ID:  Change

Address:  Change

Commission Delete

Name	Part ID	Address
XR75CX_01		
XR75CX_02		
IPX 25 Relay_01		
IPX 6 Relay_01		
IPX 6 Relay_02		

1 of 1

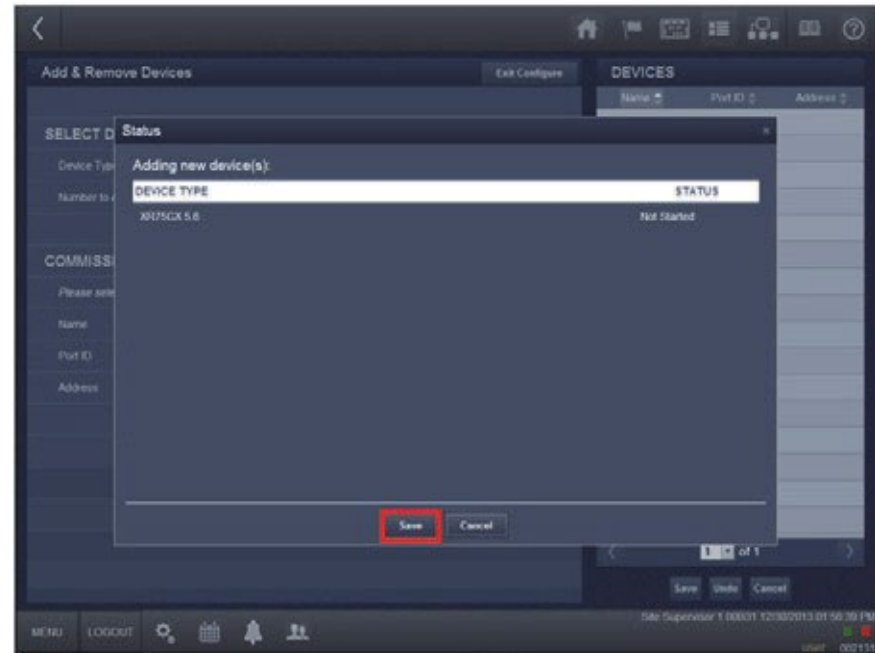
Save Undo Cancel

MENU LOGOUT Settings Calendar Notifications Users

Site Supervisor 1.00831 12/30/2013 01:47:29 PM  
user 00131

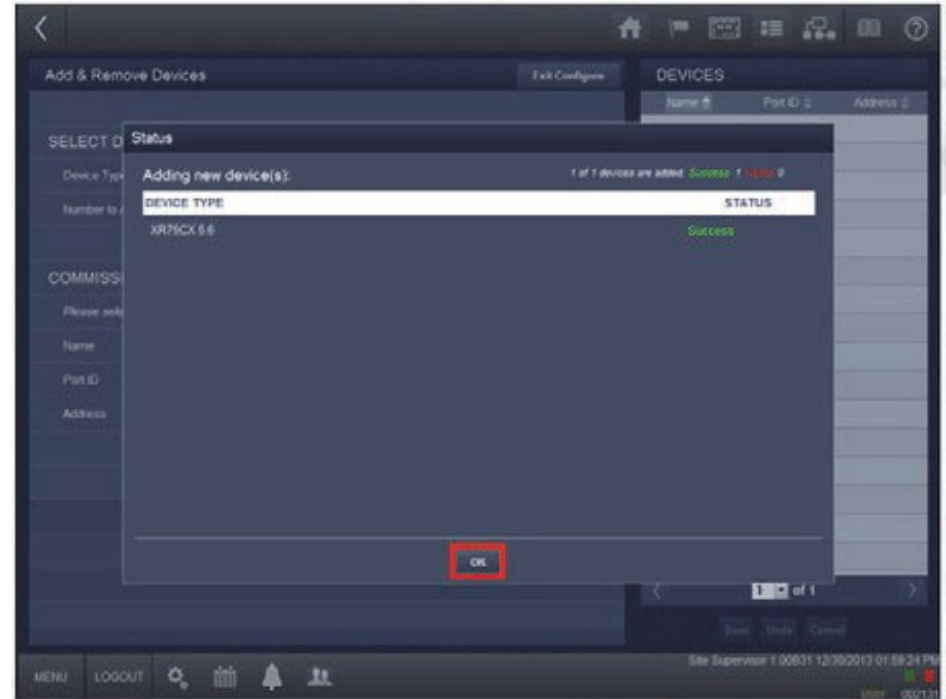
# Add a Device

- A pop-up screen will open showing the status of the device. Click **Save**.



# Add a Device

- After successfully adding the device, click **OK**.



# Commissioning a Device

- Use the **Menu** or **Site Map** button.
- Select **Configure** to modify settings.

*Configure System > Add & Remove Control > Devices*

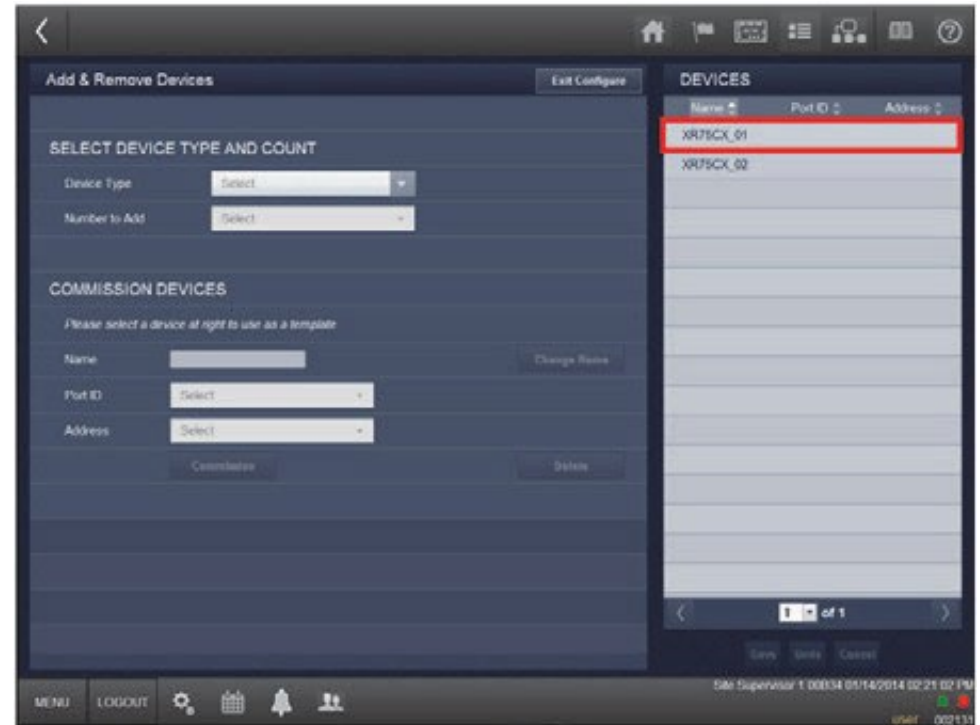
The screenshot displays the 'Add & Remove Devices' configuration interface. The 'Configure' button is highlighted with a red box. The interface includes the following sections:

- SELECT DEVICE TYPE AND COUNT:** Fields for 'Device Type' and 'Number to Add', both with 'Select' dropdown menus.
- COMMISSION DEVICES:** A section with the instruction 'Please select a device at right to use as a template'. It contains fields for 'Name', 'Port ID', and 'Address', each with a 'Select' dropdown menu. Below these fields are 'Commission' and 'Settle' buttons.
- DEVICES Table:** A table with columns 'Name', 'Port ID', and 'Address'. It lists two devices: 'XR75CX\_01' and 'XR75CX\_02'.

The bottom status bar shows: 'Site Supervisor 1 008134 01/14/2014 02:20:32 PM' and 'USER: 002131'.

# Commissioning a Device

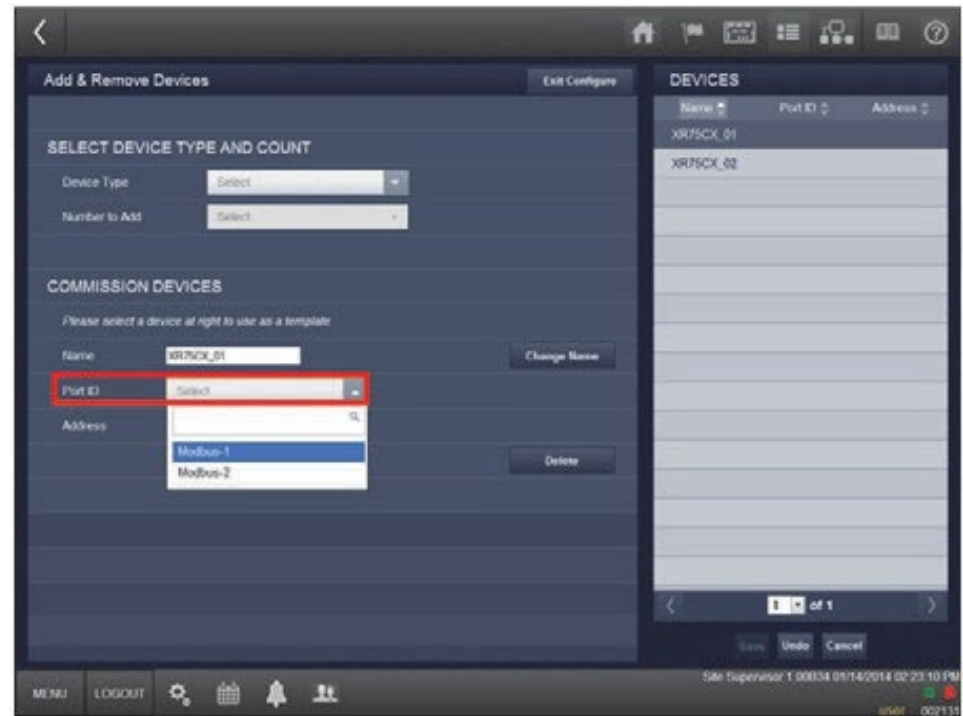
- From the list of devices on the right side of the screen, select the device you want to commission.





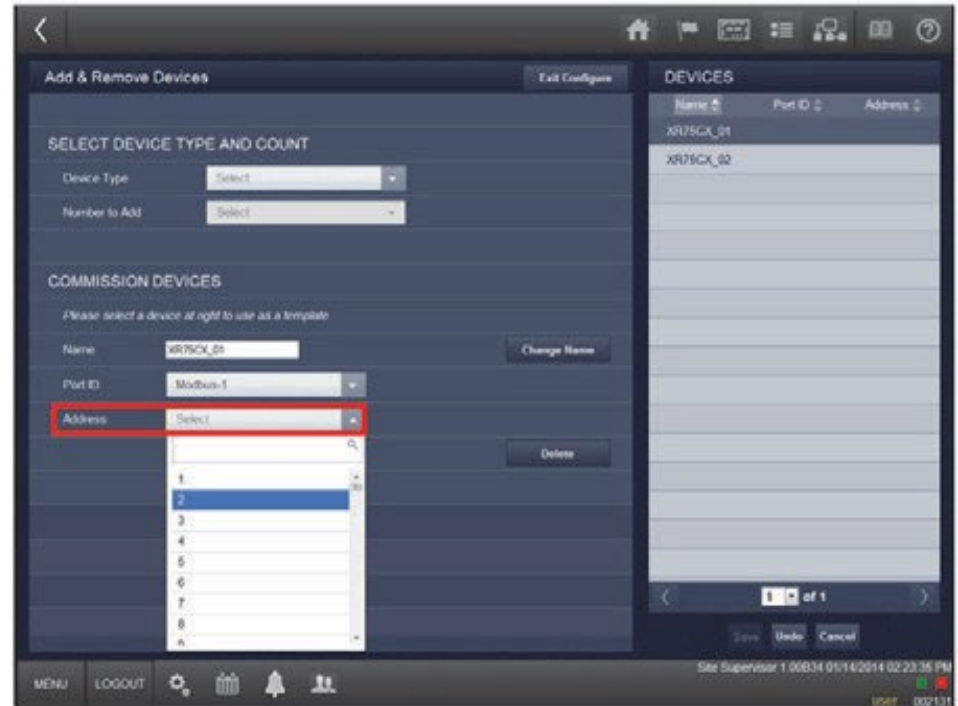
# Commissioning a Device

- Select the Port ID from the dropdown list.



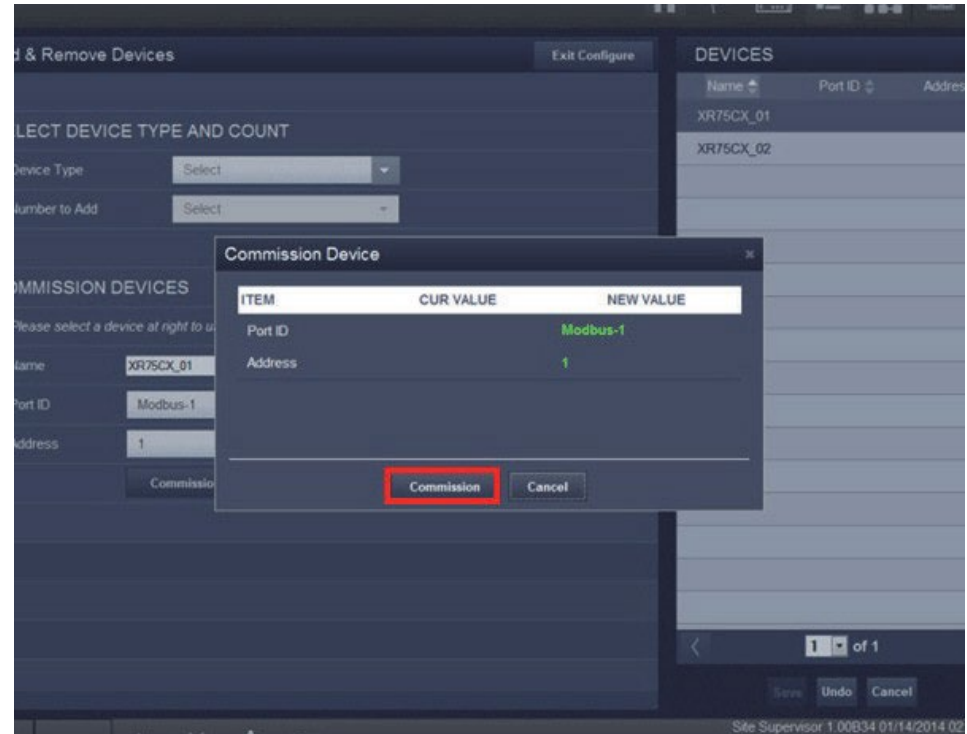
# Commissioning a Device

- Select the Address from the dropdown list.
- *Make sure there are no duplicate addresses among the devices within the same Port ID.*



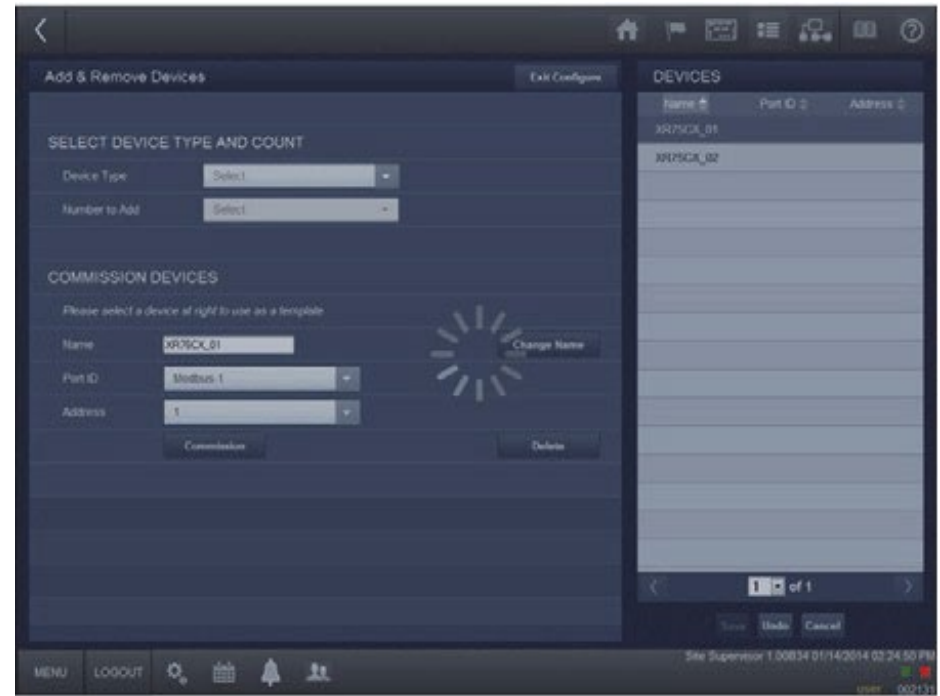
# Commissioning a Device

- Select **Commission**. A Commission Device screen will open with a summary of settings.
- If settings are correct, click on **Commission**.



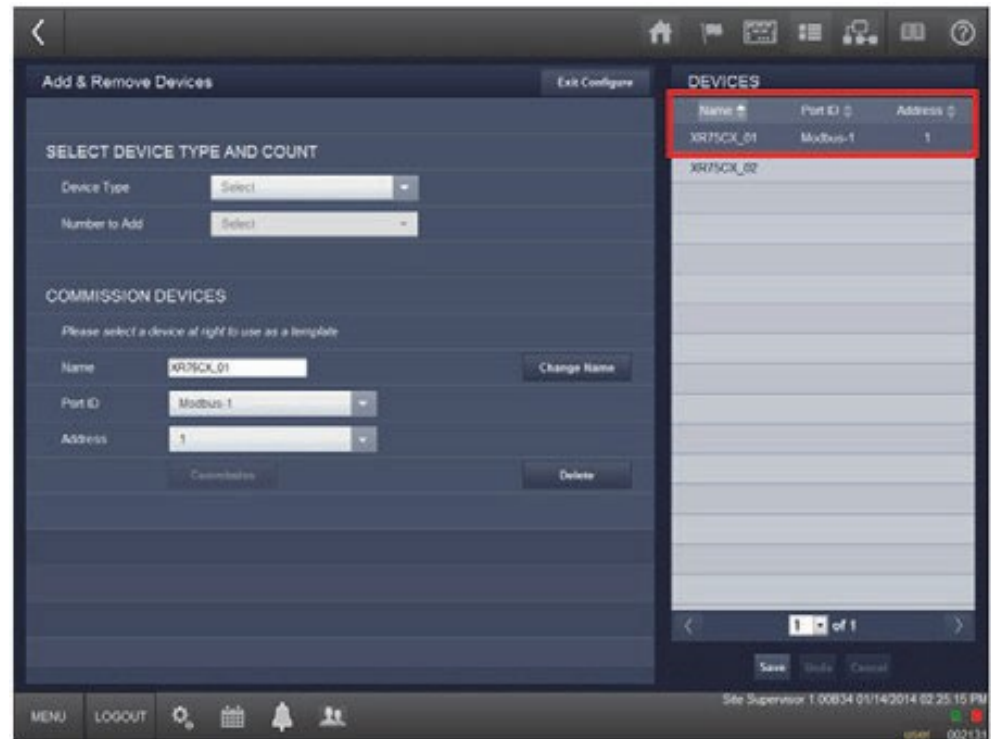
# Commissioning a Device

- Wait for the commissioning process to complete.



# Commissioning a Device

- When the process has completed successfully, the device appears on the device list panel. Port Name and Address are also displayed.





# Alarm Configuration & Transmission

Education You Can Build On



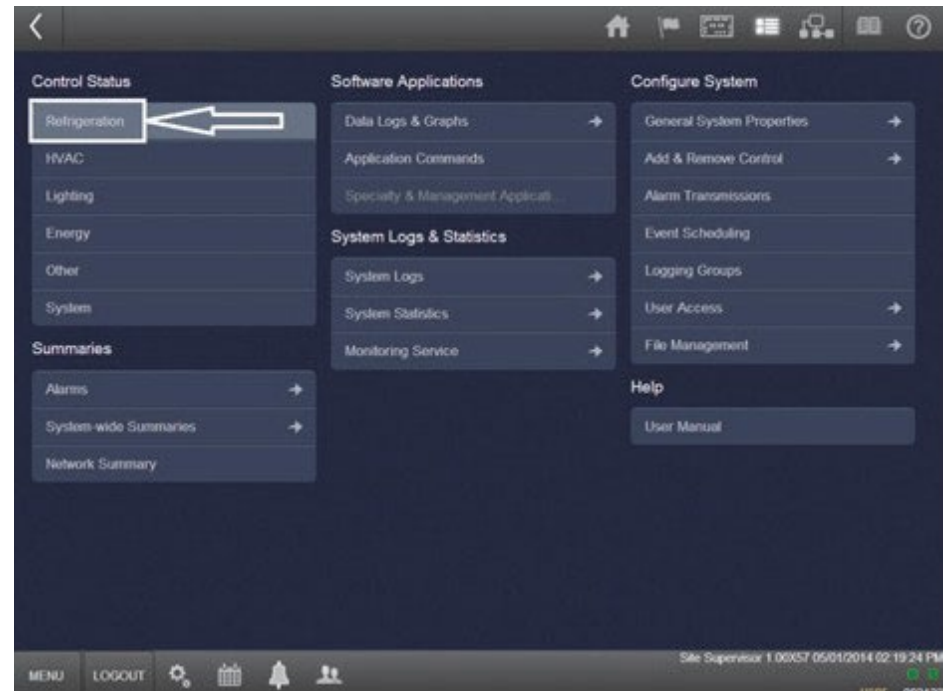
# Alarm Configuration

- Alarms can be generated from various sources, including external devices, applications, and sub-systems. Configuration, transmission, and history settings can be defined by the user.



# Alarm Configuration

- Login to Site Supervisor and go to the Site Map.
- Under Control Status, choose the category of the device or application. In this example, we have selected Refrigeration.



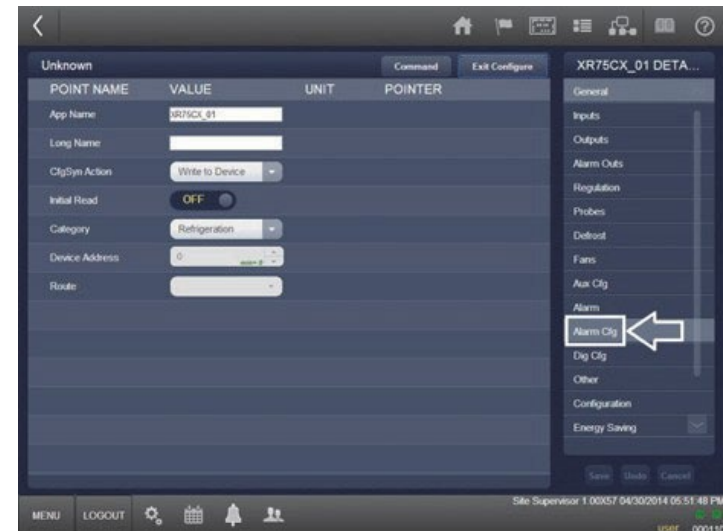
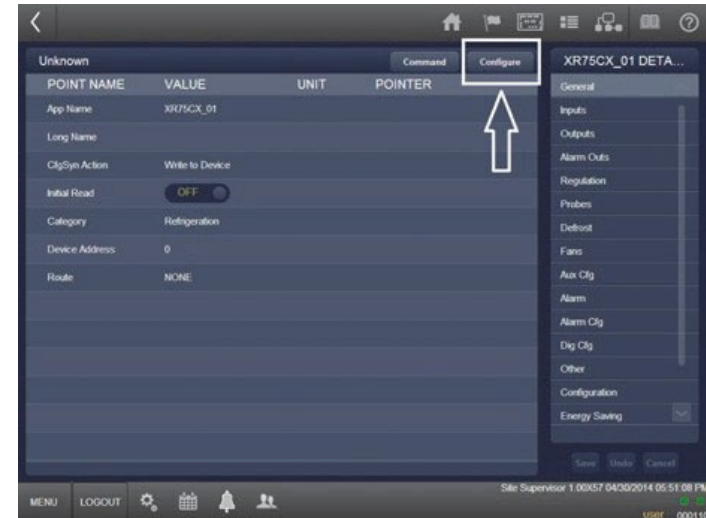
# Alarm Configuration

- Click on the **Details** tab for the device/application to access configuration properties (XR75CX controller shown).



# Alarm Configuration

- Select **Configure** to enable editing.
- Select **Alarm Cfg.**



# Alarm Configuration

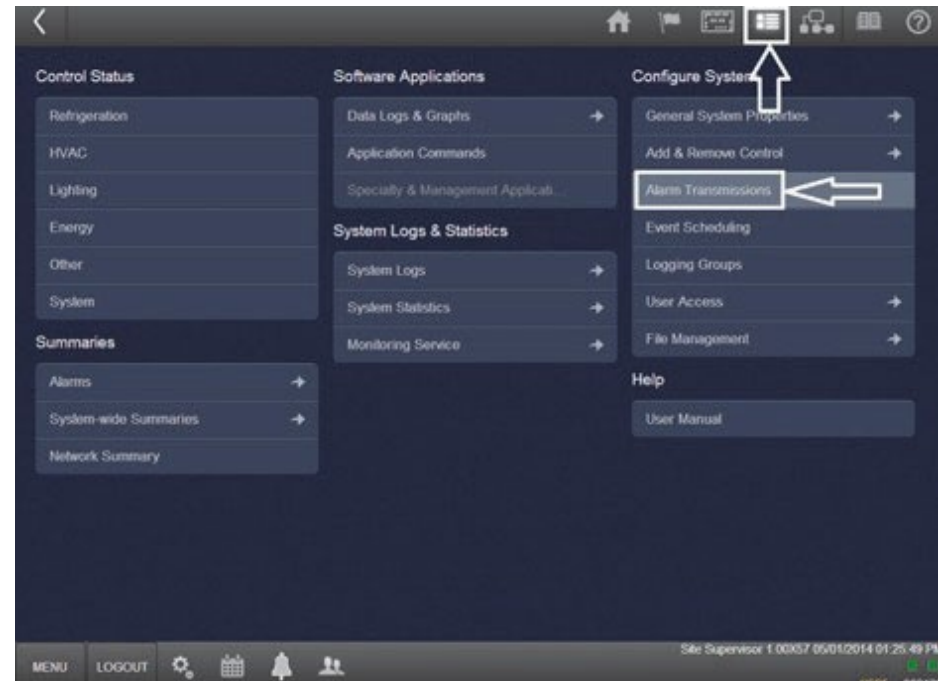
- Enter the settings for the alarm configuration.
  - Alarm description
  - Alarm type (urgency level)
  - Alarm category
  - Repeat time
  - Monitoring ON or OFF
- Click on **Save**.

POINT NAME	VALUE	UNIT	POINTER
CaseTemp DispMsg	Enter alarm description here		
CaseTemp AlmType	Non-Critical		
CaseTemp AlmCat	Refrigeration		
CaseTemp Repeat	60:00		
Case Temp Monitor	ON		
Defr Term DispMsg			
Defr Term AlmType	Non-Critical		
Defr Term AlmCat	Refrigeration		
Defr Term Repeat	60:00		
Defr Term Monitor	ON		
HCase DispMsg			
HCase AlmType	Non-Critical		
HighCase AlmCat	Refrigeration		

Site Supervisor 1.00X57 05/01/2014 10:50:25 AM  
user 00011

# Alarm Transmission

- Go to Site Map page and select **Alarm Transmissions**.



# Alarm Transmission

## Alarm Transmissions Buttons

<b>Save</b>	Records changes
<b>Undo</b>	Reverses last 8 actions
<b>Cancel</b>	Terminates changes
<b>Configure</b>	Validates privileges
<b>Retrieve</b>	Look for existing notice
<b>Delete</b>	Activated if a notice is retrieved
<b>New</b>	Create new alarm notice
<b>Add</b>	Displays recipient list

The screenshot shows the 'Alarm Transmissions' configuration window. At the top, there are buttons for 'Save', 'Undo', 'Cancel', and 'Exit Configure'. Below this is a 'Name' field containing 'All Critical Alarms' and buttons for 'Retrieve' and 'Delete'. The main area is a table with columns 'ACTION', 'CUR VALUE', and 'NEW VALUE'. The rows include 'Category', 'Alarm Type', 'Relay 1 (Audio)', 'Relay 2 (Visual)', 'Relay 3 (3rd Party A)', 'Relay 4 (3rd Party B)', 'Resolution', and 'Schedule'. Below the table is an 'APPLICATION OUTPUT' section with 'TARGET' and 'PROPERTY' dropdowns. At the bottom, there are buttons for 'New', 'Add', 'RECIPIENTS', 'E-MAIL', 'SMS', and 'REMOVE'. The footer contains 'MENU', 'LOGOUT', and system information: 'Site Supervisor 1.00825 12/06/2013 11:36:12 AM'.

# Alarm Transmission

## Dropdown/Data Entry Boxes

Name

Category

Alarm Type

Relay 1 (Audio)

Relay 2 (Visual)

Relay 3 (3<sup>rd</sup> Party A)

Relay 4 (3<sup>rd</sup> Party B)

Resolution

Schedule

Target

Property

The screenshot shows the 'Alarm Transmissions' configuration window. At the top, there are buttons for 'Save', 'Undo', 'Cancel', and 'Exit Configure'. Below this is a 'Name' field containing 'All Critical Alarms' and buttons for 'Retrieve' and 'Delete'. The main configuration area is a table with columns 'ACTION', 'CUR VALUE', and 'NEW VALUE'. The rows include 'Category', 'Alarm Type', 'Relay 1 (Audio)', 'Relay 2 (Visual)', 'Relay 3 (3rd Party A)', 'Relay 4 (3rd Party B)', 'Resolution', and 'Schedule'. The 'Relay 1 (Audio)' dropdown is open, showing options: 'Any', 'Critical Alarm', 'Non-critical Alarm', and 'Notice'. Below the table, there are 'APPLICATION OUTPUT' fields for 'TARGET' and 'PROPERTY', both set to 'Select'. At the bottom, there are buttons for 'New', 'Add', 'RECIPIENTS', 'E-MAIL', 'SMS', and 'REMOVE'. The footer contains 'MENU', 'LOGOUT', and system information: 'Site Supervisor 1.00825 12/06/2013 11:36:12 AM'.

ACTION	CUR VALUE	NEW VALUE
Category	Any	Any
Alarm Type	Any	Critical Alarm
Relay 1 (Audio)	Not enabled	<input checked="" type="checkbox"/> Any <input type="checkbox"/> Critical Alarm <input type="checkbox"/> Non-critical Alarm <input type="checkbox"/> Notice
Relay 2 (Visual)	Not enabled	Not enabled
Relay 3 (3rd Party A)	Not enabled	Not enabled
Relay 4 (3rd Party B)	Not enabled	Not enabled
Resolution	Any	Any
Schedule	None	Select

APPLICATION OUTPUT: TARGET: Select, PROPERTY: Select

Buttons: New, Add, RECIPIENTS, E-MAIL, SMS, REMOVE

Footer: MENU, LOGOUT, Site Supervisor 1.00825 12/06/2013 11:36:12 AM

# Create New Alarm Notice

- To select recipient from the recipient list, click **Add**.
- To create a new recipient, click **New**.

Alarm Transmissions

Name: All Critical Alarms

Retrieve Delete

ACTION	CUR VALUE	NEW VALUE
Category	Any	Any
Alarm Type	Any	Critical Alarm
Relay 1 (Audio)	Not enabled	Any
Relay 2 (Visual)	Not enabled	Critical Alarm
Relay 3 (3rd Party A)	Not enabled	Non-critical Alarm
Relay 4 (3rd Party B)	Not enabled	Notice
Resolution	Any	Not enabled
Schedule	None	Not enabled
APPLICATION OUTPUT	TARGET: Select	PROPERTY: Select

New Add RECIPIENTS E-MAIL SMS REMOVE

MENU LOGOUT Site Supervisor 1.00B25 12/06/2013 11:36:12 AM

# Create New Alarm Notice

- Select recipient(s) and choose **OK**.

The screenshot displays the 'Alarm Transmissions' configuration window. The main window has a title bar with 'Save', 'Undo', 'Cancel', and 'Exit Configure' buttons. Below the title bar, there is a 'Name' field containing 'All Critical Alarms' and 'Retrieve' and 'Delete' buttons. The main area is a table with columns 'ACTION', 'CUR VALUE', and 'NEW VALUE'. The table contains the following rows:

ACTION	CUR VALUE	NEW VALUE
Category	Any	Any
Alarm Type	Any	Non-critical Alarm
Relay 1 (Audio)	Not enabled	Not enabled
Relay 2 (Visual)		
Relay 3 (3rd Party A)		
Relay 4 (3rd Party B)		
Resolution		
Schedule		

A 'Recipients' dialog box is open in the center, showing a list of recipients with columns for 'Recipient', 'E-mail', 'SMS', and 'Language'. The 'SMS' column is currently empty. The 'user' recipient is selected with a checkmark. The dialog has 'OK' and 'Cancel' buttons at the bottom.

Below the table, there is an 'APPLICATION OUTPUT' section with 'TARGET' and 'PROPERTY' dropdown menus. At the bottom of the main window, there are 'New' and 'Add' buttons, followed by a table with columns 'RECIPIENTS', 'E-MAIL', 'SMS', and 'REMOVE'. The bottom status bar shows 'MENU', 'LOGOUT', and system icons. The footer text reads 'Site Supervisor 1.00B25 12/06/2013 01:50:35 PM' and 'user 00524'.

# Create New Alarm Notice

- Select type of transmission – email or SMS (text) or both

The screenshot displays the 'Alarm Transmissions' configuration window. At the top, there are buttons for 'Save', 'Undo', 'Cancel', and 'Exit Configure'. Below this, a 'Name' field is set to 'All Critical Alarms', with 'Retrieve' and 'Delete' buttons. The main configuration area is a table with three columns: 'ACTION', 'CUR VALUE', and 'NEW VALUE'.

ACTION	CUR VALUE	NEW VALUE
Category	Any	Any
Alarm Type	Any	Non-critical Alarm
Relay 1 (Audio)	Not enabled	Not enabled
Relay 2 (Visual)	Not enabled	Not enabled
Relay 3 (3rd Party A)	Not enabled	Not enabled
Relay 4 (3rd Party B)	Not enabled	Not enabled
Resolution	Any	Any
Schedule	None	Select

Below the table, there are 'APPLICATION OUTPUT' fields for 'TARGET' and 'PROPERTY', both set to 'Select'. The 'RECIPIENTS' section includes 'New' and 'Add' buttons, and a list of recipients. One recipient, '(New address) SSMTIH', is shown with 'E-MAIL' and 'SMS' checkboxes checked. A yellow circle highlights these checkboxes. A 'REMOVE' button is also present for each recipient.

At the bottom of the interface, there is a 'MENU' button, a 'LOGOUT' button, and a set of icons for settings, calendar, notifications, and users. The status bar at the bottom right shows 'Site Supervisor 1.00825 12/06/2013 01:52:06 PM' and 'user 00524'.

# Create New Alarm Notice

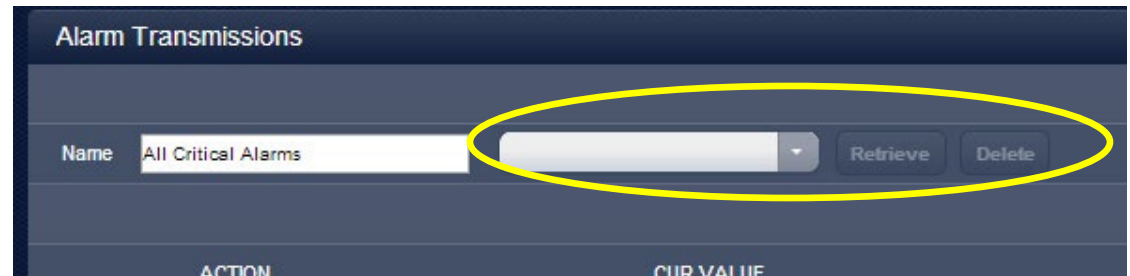
- Create new alarm notice by entering name in the **Name** entry box. Must be unique.
- When all fields are completed, confirmation screen will appear. Click **Save** or **Abandon Changes**.

The screenshot shows the 'Alarm Transmissions' configuration screen. At the top, there are buttons for 'Save', 'Undo', 'Cancel', and 'Exit Configure'. Below this is a 'Name' field containing 'All Critical Alarms' and buttons for 'Retrieve' and 'Delete'. The main configuration area is a table with three columns: 'ACTION', 'CUR VALUE', and 'NEW VALUE'. The rows are: Category (Any), Alarm Type (Non-critical Alarm), Relay 1 (Audio) (Not enabled), Relay 2 (Visual) (Not enabled), Relay 3 (3rd Party A) (Not enabled), Relay 4 (3rd Party B) (Not enabled), Resolution (Any), and Schedule (None). Below the table are 'APPLICATION OUTPUT' fields for 'TARGET' and 'PROPERTY', both set to 'Select'. At the bottom, there are buttons for 'New', 'Add', 'RECIPIENTS', 'E-MAIL', 'SMS', and 'REMOVE'. A recipient entry is visible: '(new active) SSMITH' with checkmarks under 'E-MAIL' and 'SMS'. The footer contains 'MENU', 'LOGOUT', system icons, and the text 'Site Supervisor 1.00E25 12/06/2013 01:52:06 PM' and 'USER 00524'.

ACTION	CUR VALUE	NEW VALUE
Category	Any	Any
Alarm Type	Any	Non-critical Alarm
Relay 1 (Audio)	Not enabled	Not enabled
Relay 2 (Visual)	Not enabled	Not enabled
Relay 3 (3rd Party A)	Not enabled	Not enabled
Relay 4 (3rd Party B)	Not enabled	Not enabled
Resolution	Any	Any
Schedule	None	Select

# Retrieve Existing Alarm Notice

- Existing notices can be found from the drop-down menu beside the Name data entry box.
- Click the **Retrieve** button.



# Questions?

Education You Can Build On

