EcoStruxure™ Facility Expert
Legal & safety information

The information provided in this documentation contains general descriptions and/or technical characteristics of the performance of the products contained herein. This documentation is not intended as a substitute for and is not to be used for determining suitability or reliability of these products for specific user applications. It is the duty of any such user or integrator to perform the appropriate and complete risk analysis, evaluation and testing of the products with respect to the relevant specific application or use thereof. Neither Schneider Electric nor any of its affiliates or subsidiaries shall be responsible or liable for misuse of the information contained herein. If you have any suggestions for improvements or amendments or have found errors in this publication, please notify us.

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All pertinent state, regional, and local safety regulations must be observed when installing and using this product. For reasons of safety and to help ensure compliance with documented system data, only the manufacturer should perform component repairs.

When devices are used for applications with technical safety requirements, the relevant instructions must be followed. Failure to use Schneider Electric software or approved software with our hardware products may result in injury, harm, or improper operating results. Failure to observe this information can result in injury or equipment damage.

Safety Information

Important Information

NOTICE

Read these instructions carefully and look at the equipment to become familiar with the device before trying to install, operate, service or maintain it. The following special messages may appear throughout this bulletin or on the equipment to warn of potential hazards or to call attention to information that clarifies or simplifies a procedure.

The addition of either symbol to a "Danger" or "Warning" safety label indicates that an electrical hazard exists which will result in personal injury if the instructions are not followed.

This is the safety alert symbol. It is used to alert you to potential personal injury hazards. Obey all safety messages that follow this symbol to avoid possible injury or death.

⚠️ DANGER

DANGER indicates a hazardous situation which, if not avoided, will result in death or serious injury.

⚠️ WARNING

WARNING indicates a hazardous situation which, if not avoided, could result in death or serious injury.

⚠️ CAUTION

CAUTION indicates a hazardous situation which, if not avoided, could result in minor or moderate injury.

NOTICE

NOTICE is used to address practices not related to physical injury. The safety alert symbol shall not be used with this signal word.
How to use the EcoStruxure™ Facility Expert Starter Guide interface

USE THE SCROLL WHEEL TO NAVIGATE THROUGH THE GUIDE

To create an account, complete and sign up mandatory information

Once the App has been downloaded you need to sign legal documents upon your registration. Otherwise the application won’t be accessible.

1. Click on 'Sign up'
2. Complete and create your password on 'My personal information'
3. Complete 'My Company' mandatory information

For data logger commissioning refer to ESSP commissioning guide

YouTube link

Web site link

Link to an other part of the document

Link to a specific appendix

Progress within a section

Last view

Awareness for important information

Click on the arrows to navigate

Interactive menu in a main section
With the power of EcoStruxure, you gain a complete IoT-ready solution to protect assets, monitor energy consumption, and optimize buildings operations, comfort and performance. Designed for low and medium voltage architectures, EcoStruxure™ Power solutions enhance connectivity, reliability, and smart analytics so that your operations run smoothly, sustainably, and more profitably.

With EcoStruxure™ Facility Expert, Schneider Electric delivers a connected technology platform that allows you monitoring and access to an assets’ information, from any place at any time, and to receive alarms through mobile applications, helping users reduce the risk of prolonged equipment downtime or events and gain control of operations for their entire building’s portfolio.
EcoStruxure™ Facility Expert is a cloud-based software that helps you improve operations and energy efficiency in individual facilities or across an entire portfolio of buildings.

Smart phone connectivity, collaborative technology, remote monitoring, and automated alerts connect you to buildings and key equipment 24/7, making maintenance more reliable and operations more efficient, and cost-effective.

EcoStruxure™ Facility Expert account gives you access to interfaces that are adapted to field and desk usage:

A mobile App to simplify day-to-day operations, access, log, and share asset information easily from the field, schedule maintenance, and to be notified in case of equipment alert or alarm.

Access to EcoStruxure™ Facility Expert thru the web to ease asset condition review and trend analysis from the office.

From smart services to building excellence

Up to 8% savings on operating expenses

Up to 10% business continuity for your customers

Up to 5% energy bill savings for your customers

Learn more about EcoStruxure™ Facility Expert:
schneider-electric.com

Discover EcoStruxure™ Facility Expert
Main features

- Data trends on connected assets
- Smart alerts with actionable data
- Equipment status
- Maintenance status and localization at a glance
- Collaboration features
- Edition and automatic storage of intervention reports
- Asset details available from the field
- Actionable task manager with long term maintenance schedules & reminders

* This feature is available without subscription

APPENDIX

A free application to discover and use CMMS and digital logbook for your equipment portfolio. A subscription to add the benefit of connected and alarming features.

More details about Ecostruxure® Facility Expert subscription:
Digital solutions tailored for services

Schneider Electric offers opportunities to leverage your unique skills, set up your own business development strategy, and offer a full range of advanced services to your customers.

Based on the latest technology merging mobile App, Web platform and IoT, EcoStruxure™ Facility Expert range of subscriptions helps you deliver valuable services, optimize field operations, monitor energy consumption, or control HVAC equipment remotely in a single or multi-site buildings.

From the user convenience of your smartphone you get everything you need to face your daily challenges, reduce equipment failures and improve facility’s efficiency and performance.

* This feature is available without subscription
SECURE DATA COLLECTION
WITH SMART PANELS

Transmission flow between onsite gateways and Schneider Electric's Data center is encrypted with cryptographic protocol (HTTPS minimum level required is TLS 1.2).

- Signed firmware for MasterPact MTZ, IFE and IO Module
- Strong password policy for IP devices

SECURE DATA COLLECTION, PROCESSING, STORAGE AND ACCESS

Schneider Electric DATA CENTER

Our cloud services are physically deployed across multiple Microsoft Azure data centers.

Microsoft data centers are world-class facilities with more certifications than any other cloud provider (ISO/IEC 22301, 27017, 27018 and ISO/IEC 27001 in addition to SOC 1, SOC 2 and SOC 3).

To learn more about Microsoft’s Azure data centers, please visit [Microsoft Azure](https://azure.microsoft.com).

EcoStruxure™ Facility Expert

All parts of the application are protected by firewalls. All access to EcoStruxure™ Facility Expert application is logged to allow full traceability.

Data confidentiality is also ensured thanks to a strong role-based access control mechanism. Before any customer release, Schneider Electric tests and validates EcoStruxure™ Facility Expert offerings thanks to a dedicated world class cyber security testing. In parallel, Penetrations Tests are performed by external IT specialist entities to strengthen the security.

- Software in Microsoft Azure environment
- HTTPS access
- Strong authentication management to access dashboard and password policy
- Signed and dedicated Schneider certificate for each components
- Code analysis has been made with no critical issue

To learn more about EcoStruxure™ Facility Expert, please visit [EcoStruxure Facility Expert](https://www.schneider-electric.com/en-us/ecostruxure-facility-expert).
Schneider Electric focuses on securing data flows coming from connected products and solutions (whether they connect to non-Schneider hosts or platforms managed by Schneider Electric), and on aligning to the latest data integrity and privacy regulatory requirements such as the European General Data Protection Regulation (GDPR).

DATA REMAINS CUSTOMER OWNERSHIP

- Data policy is compliant to local regulation
- Customer Data Use and Protection policy to be electronically signed by the Responsible of the site (Building owner, Tenant, …). No Data will be exported without this agreement.
Discover EcoStruxure™ Facility Expert features, from maintenance digital logbook to asset monitoring.

Objective of this starter guide is to support you handling your App from your account creation to connected features in order to help you get even more efficient in your maintenance & operations activities by using your App.

In addition you shall find in the document actionable explanations describing the main features and actions to be performed with EcoStruxure™ Facility Expert, through interactive descriptions and possibility to refer to other available materials, such as videos or brochures.

In some cases, you can also get the opportunity to switch directly to a related section, access details to complement your knowledge on this subject through link to the Annexes chapter, or open information pop-up to read useful information and usage recommendations.

For questions, comments, or to receive updated news on EcoStruxure™ Facility Expert software evolution, please contact us at the following email address: facilityexpert@schneider-electric.com

Note: this document introduces the features of:
- EcoStruxure™ Facility Expert – free version
- EcoStruxure™ Facility Expert – Operations

Learn more about features per subscription in APPENDIX
I START
WITH MY App

I CREATE
MY ASSET LIBRARY

I OPERATE
WITH MY App AND MANAGE MY LIBRARY
I START

Get to know User Interface

- Overview UI
- Quick access UI
- Task manager UI
- Asset detail UI
- Map view UI

Create account

Set preference

Download

Get to know user interface
Prerequisite

Information and requirements on supported mobile hardware and recommended web browsers.

**Supported hardware for mobile App**
- For Apple
  Version of the iOS v9 or later
- For Android
  Android OS v6.0 or later

**Recommended internet browsers for Web portal**
- Google Chrome from v65 (recommended browser)
- Firefox from v59.0.2

A mobile application which runs in Online or Offline mode
During maintenance operations, technicians may be out of mobile network areas but they can still add information. As soon as the smartphone detects a mobile network it will automatically update the information.
How to download EcoStruxure™ Facility Expert application from App stores

Search for EcoStruxure™ Facility Expert according to your operating system, iOS or Android, or just scan the proper QR code below.

**FROM MOBILE OR TABLET SEARCH ENGINE**

**SCAN QR CODE FOR iOS OR ANDROID DEVICES**

**Note:** EcoStruxure™ Facility Expert application is available for smartphones and tablet. For laptop usage, connect to EcoStruxure™ Facility Expert Web portal.
EcoStruxure™ Facility Expert account created from the web

If you create an account through EcoStruxure™ Facility Expert from the web you will be able to log in with the same username and password to use the App on your other devices.
To create an account, complete and sign up mandatory information

Once the App has been downloaded you need to sign legal documents upon your registration. Otherwise the application won’t be accessible.

1. Click on "Sign up"
2. Complete and create your password on "My personal information"
3. Complete "My Company" mandatory information
4. Check CAPTCHA box
5. Confirm by clicking on "Sign Up"

Then, you will receive an email to activate your account.
Access Privacy policy and agree to the terms and conditions

1. Access to the “Data Privacy” notice and to the “Terms and Conditions”
2. Read the legal documents
3. Tick the box to confirm your agreement

Note: You can access the legal documents anytime in your settings menu.
Preferences and settings

This entry enables you to access your legal documents, complete your personal profile or to configure your App.

1. To set your language, click on "More" entry and open "settings"

2. Open "Language" on your settings tab

3. Select your favorite language

Multi-language users can not set more than one language in Settings

Note: In settings you can also:
- Access to legal documents
- Request support
- Enable/disable help and notifications
- Customize your profile
Overview - User Interface

Home page of your App. Overview is your dependable dashboard to keep an eye on your equipment, assets status, planned tasks or to manage your asset library from anywhere, anytime.

Discover how to use it:

Blue line appears on the left of User Interface to help you quickly identify unread notifications received for all main menus: asset status, tasks or community.
Overview - User Interface

Home page of your App. Overview is your dependable dashboard to keep an eye on your equipment, assets status, planned tasks or to manage your asset library from anywhere, anytime.

Discover how to use it:

Blue line appears on the left of User Interface to help you quickly identify unread notifications received for all main menus: asset status, tasks or community.

Be aware that there are some differences between the “+” button location on Android or iOS interface.

Click on “+” for quick access to main functions.
Overview - User Interface

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Discover how to use it:

Blue line appears on the left of User Interface to help you quickly identify unread notifications received for all main menus: asset status, tasks or community.

Access to Asset Status and map location
Access to Tasks manager
Access to Asset Library
Click on "..." the "More" key to access to reports, community, settings and Offline mode

Point out number and topics of received notifications.
Overview - User Interface

Home page of your App. **Overview** is your dependable dashboard to keep an eye on your equipment, assets status, planned tasks or to manage your asset library from anywhere, anytime.

**Discover how to use it:**

- **Blue line** appears on the left of User Interface to help you quickly identify unread notifications received for all main menus: asset status, tasks or community

**Access to tasks list**
Overview - User Interface

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Quick Access - User Interface

Click on “+” on the overview UI to display **Quick access** dashboard and access faster to the main features of your App.

**Discover main keys:**

*Note: order of main keys differs on iOS or Android*
Quick Access - User Interface

Click on “+” on the overview UI to display Quick access dashboard and access faster to the main features of your App.

Discover main keys:

Note: order of main keys differs on iOS or Android

Enter manual readings: water/gas/electricity consumption, running hours…
Quick Access - User Interface

Click on “+” on the overview UI to display **Quick access** dashboard and access faster to the main features of your App.

**Discover main keys:**

- **Overview**
- **Task Manager**
- **Asset Detail**
- **Map View**

**Note:** order of main keys differs on iOS or Android

In the field, raise an issue manually
Quick Access - User Interface

Click on “+” on the overview UI to display Quick access dashboard and access faster to the main features of your App.

Discover main keys:

Note: order of main keys differs on iOS or Android

Create and register a new asset in your library
Quick Access - User Interface

Click on “+” on the overview UI to display Quick access dashboard and access faster to the main features of your App.

Discover main keys:

Note: order of main keys differs on iOS or Android

In the field, log an intervention on an asset
Quick Access - User Interface

Click on “+” on the overview UI to display Quick access dashboard and access faster to the main features of your App.

Discover main keys:

Note: order of main keys differs on iOS or Android

Create maintenance task plan for your team
Quick Access - User Interface

Click on “+” on the overview UI to display Quick access dashboard and access faster to the main features of your App.

Discover main keys:

Note: order of main keys differs on iOS or Android

In the field, simply scan a QR code to:
- Access asset data and documents
- Create a new switchboard
- Enable PrismaSet Active Services
Task Manager - User Interface

With the Task Manager of your App, you can choose between Calendar or Task list view, easily filter predefined tasks, identify nature, assignment status of each task and quickly find one to access its details.

Discover your Task manager:

Filter list:
- Assigned to you
- Not assigned
- Unread
- Undated tasks
- Next 3 months tasks
- Late tasks
- Preventive tasks
- Reactive tasks
- Inspection

Note: you can activate several tags at the same time if needed.
Task Manager - User Interface

With the Task Manager of your App, you can choose between Calendar or Task list view, easily filter predefined tasks, identify nature, assignment status of each task and quickly find one to access its details.

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"+" = Quick access to create a new task
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Task Manager - User Interface

With the Task Manager of your App, you can choose between Calendar or Task list view, easily filter predefined tasks, identify nature, assignment status of each task and quickly find one to access its details.

Discover your Task manager:

Assignment status:
- Assigned to a team member
- Assigned to me
- Unassigned

Filter list:
- Assigned to you
- Not assigned
- Unread
- Undated tasks
- Next 3 months tasks
- Late tasks
- Preventive tasks
- Reactive tasks
- Inspection

Note: you can activate several tags at the same time if needed.
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- Assigned to you
- Not assigned
- Unread
- Undated tasks
- Next 3 months tasks
- Late tasks
- Preventive tasks
- Reactive tasks
- Inspection

**Note:** You can activate several tags at the same time if needed.

**Schedule indication:**
- Late tasks
- Can you go on site
- Can you go on site
- Control annual of the battery ext...
Asset Detail - User Interface

For each asset, you can access:

1. Shortcut to log an intervention, create a new task or to raise a detected issue.
3. Asset nameplate: location, picture, QR code features.
4. Active alert list: actionable to access alarm detail.
5. Preventive maintenance and tasks overview.

Discover the App
Asset Detail - User Interface

Discover Asset dashboard:

- Overview
- History
- Tasks
- Attached Files
- Community
- Trends
- Settings
- Map View
- Task Manager
- Asset Detail
- Discover the App
Asset Detail - User Interface

Discover Asset dashboard:

Asset picture that you can customize
Asset Detail - User Interface

Discover Asset dashboard:

Asset status with criticality indication:
Orange for an alert
Red for an alarm
Asset Detail - User Interface

Discover Asset dashboard:

Asset name, with Wifi icon if your asset is connected.
Asset Detail - User Interface

Discover Asset dashboard:

Asset location. Actionable to open map view
Asset Detail - User Interface

Discover Asset dashboard:

Quick access to QR code generation, export and print
Asset Detail - User Interface

Discover Asset dashboard:

Preventive maintenance and tasks overview
Asset Detail - User Interface

Discover Asset dashboard:

Asset alert list. Actionable to access detailed information
Asset Detail - User Interface

Discover Asset dashboard:

Asset journal with:
- intervention logs
- alarms/alerts history
- manual readings
Asset Detail - User Interface

Discover Asset dashboard:

Asset maintenance plan
Asset Detail - User Interface

Discover Asset dashboard:

Uploaded documents: picture, maintenance guide, single line diagram…
Asset Detail - User Interface

Discover Asset dashboard:

List of users who have access to the assets
Asset Detail - User Interface

Discover Asset dashboard:

Trending for connected assets
Asset Detail - User Interface

Discover Asset dashboard:

Manual readings creation & setting
Map View - User Interface

Map view helps you localize your assets and identify their status at a glance.

**Discover Map UI:**

- **Navigate on the map and filter by area or asset status**
- **Blue line** appears on the left of User Interface to help you quickly identify unread notifications received for all main menus: asset status, tasks or community
Map View - User Interface

Map view helps you localize your assets and identify their status at a glance.

**Discover Map UI:**

- **Asset status view** with alert and alarm status displayed by default

- **Map view** helps you localize your assets and identify their status at a glance.

- **Navigate on the map and filter by area or asset status**

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A list to navigate easily into your park of assets
Map View - User Interface

Map view helps you localize your assets and identify their status at a glance.

**Discover Map UI:**

- **Navigate on the map and filter by area or asset status**
- **Blue line** appears on the left of User Interface to help you quickly identify unread notifications received for all main menus: asset status, tasks or community.

A map to locate your park of assets and manage efficiently your operations.
I CREATE

I register a new asset manually

I save time when creating maintenance tasks

I download an asset from Schneider Electric resources repository

I activate services

I save time when creating maintenance tasks
I CREATE

- Create a folder
- Assign a task
- Create a new asset
- Create QR code
- Locate a new asset
- Create manual readings
- Set up Maintenance plan
- Attach a file
- Detail a task

I register a new asset manually
EcoStruxure™ Facility Expert User Guide | Page 64

**I CREATE**

- Apply Schneider Electric asset template
- Duplicate a task for an asset
- Apply a task to several assets
- I save time when creating maintenance tasks
- I download an asset from Schneider Electric resources repository
- I activate services

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EcoStruxure™ Facility Expert

Life Is On

Schneider Electric
I download an asset from Schneider Electric resources repository

By scanning Schneider Electric products QR code

By scanning a panel QR code created with EcoStruxure Power Commission

I register a new asset manually

I activate services

I save time when creating maintenance tasks

By scanning a panel QR code created with EcoStruxure Power Commission
I CREATE

Introduction

Activate Services for PrismaSet Active wireless panel server

Commission other Schneider Electric gateways

Create email and https alerts

I save time when creating maintenance tasks

I download an asset from Schneider Electric resources repository

I activate services
Structure your asset library

Asset library tree structure is crucial. When you register an asset, you can define its parent in the structure by creating a site, an equipment or a folder for each asset.

For instance:
**Site/Switchboard/asset**

Note that folders purpose is only to classify the equipment into the tree structure and that EcoStruxure™ Facility Expert limits hierarchy to 5 levels maximum.

Apply easily location of parent asset to all sub-assets. Change on parent asset address can be immediately applied on child assets.

To avoid having to create maintenance tasks for similar equipment you can simply **duplicate an asset** within all its associated maintenance plan. Tasks, periodicity and actions list will be kept, but not the contributor assignment or other attached documents (pictures, description etc…) as they are contextual information and asset specific.
Structure your asset library

Asset library tree structure is crucial. When you register an asset, you can define its parent in the structure by creating a site, an equipment or a folder for each asset.

For instance:
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To avoid having to create maintenance tasks for similar equipment you can simply duplicate an asset within all its associated maintenance plan. Tasks, periodicity and actions list will be kept, but not the contributor assignment or other attached documents (pictures, description etc…) as they are contextual information and asset specific.

Apply easily location of parent asset to all sub-assets. Change on parent asset address can be immediately applied on child assets.

For each parent you visualize the quantity of related sub-assets

You can click on "…" to access to the parent information (customer/site/switchboard…) or to duplicate/delete it.

Doing so, all the related equipment – if existing – will be duplicated or deleted.

Navigate to sub-assets just by clicking on the line. Without sub-assets you directly access to the equipment details.

Organize assets by sites or customers

Learn how you can "Duplicate an asset"
Learn how to "Transfer asset ownership"
Create a new folder

Folder creation helps you classify your assets and equipment in your library but you won’t be able to log information in your folder, as you do for an asset, and you will not visualize a folder on the Map.

1. On “Overview”, select “Assets” entry
2. Click on “+”
3. Select “New Folder”

You won’t be able to create a folder from the shortcut “+” on the Overview screen.

Access recommendations to build the “Tree structure” of your asset library.
Create a new folder (cont.)

Folder creation helps you classify your assets and equipment in your library but you won’t be able to log information in your folder, as you do for an asset, and you will not visualize a folder on the Map.

1. Name the folder
2. Fill in useful information
3. Click “OK” to confirm creation

You won’t be able to create a folder from the shortcut “+” on the Overview screen.

Access recommendations to build the “Tree structure” of your asset library.
Create a new asset manually

1. Click on "+"
2. Select "New asset"
3. Enter asset "Name"
4. Choose asset "Parent"

- I register a new asset manually
  - Create a folder
  - Create a new asset
  - Locate a new asset
  - Set up Maintenance plan
  - Detail a task
  - Assign a task
  - Create QR code
  - Create manual readings
  - Attach a file

- I save time when creating maintenance tasks
- I download an asset from SE resources repository
- I activate services
Create a new asset manually (cont.)

- **Select a “Family”**: Choose the appropriate category for your asset.
- **Create or select an asset “Type” / “Model”**: Specify the specific type and model of the asset.
- **Enter “Quantity” for quicker duplication**: This field allows you to quickly create multiple assets with similar specifications.
- **Add other asset information (brand/serial number, ref...)**: Supplemental details can be added to provide more context about the asset.

**Additional Features**
- When entering a valid Schneider Electric product reference, all documentation and product picture are automatically accessible.
- You can create and duplicate up to 25 new assets at once. Key information such as parent, asset location, type and model, commissioning date, attachments and maintenance plan are cloned across all.
- You can save time when creating maintenance tasks.
- You can download an asset from SE resources repository.
- You can activate services after creating an asset.
- You can activate services after creating an asset.

**Save by clicking on “OK”**: This action saves the asset information and confirms the creation process.

**Modify “Instruction” field**: This feature allows you to update or edit the instructional notes associated with the asset at any time.

**Assign a task**: Manage tasks related to the asset effectively.

**Add a file**: Attach relevant files or documents to the asset record.

**Organize assets by sites or customers**: Keep track of assets organized by specific locations or client information.
Locate the new asset

11. Fill in "Location" by entering address or by geolocation.

12. Save by clicking on "OK".

13. Verify on the "Map" or on your "Assets List" that your new asset is now stored in your library.
Set up maintenance plan

Setting up your asset maintenance plan helps you ensure the preventative maintenance will be performed on time thanks to reminders and the defined list of actions.

ON ASSET DETAIL VIEW:

1. Click on “Plan a task”
2. Enter “Description”
3. Select first occurrence
4. Schedule the recurrence with “Repeat” entry
5. Click on “Type” and select the category of this task
Set up maintenance plan (cont.)

6. **Click on “OK” to confirm**

7. **The task is now registered in your calendar and your tasks list, with all its related details**

Therefore, you can still manage your maintenance plans or assign the task later to a member of your team.
Customize maintenance template for 3rd party assets

1. Access the new "template" tab from Facility Expert web application.

2. For each new custom template:
   - Enter the template name
   - Detail the maintenance plan: tasks, actions, reminders
   - Add attachments
   - And set manual readings

3. Then, you will be able to update an existing template already applied to a batch as assets.

4. You can apply Schneider Electric preconfigured templates
   OR
   custom templates from your library

- Select the scope of your existing assets to apply this template

Note: once the template is applied on your assets, you cannot modify or delete tasks and attachments.

Or to modify the scope of assets associated to a template.
Set up reminder and detail the task

8. Set up a **reminder** to upload the task into your calendar, and be notified in advance when the intervention must be performed.

9. Create a list of **actions** or create subtasks with dedicated group of actions.

10. Simply modify or delete title, action names or action order.

When you register several actions, you can easily re-organize them by picking up one and sliding up/down to change the order of your list of actions.
Assign the task to a member of your team and change it later if you want.

You can also select the “Measures” you want to associate to the task.
CREATE

1. In Facility Expert mobile App, go to “Overview” tab of the asset.
2. Click on the QR code black icon.
3. ...and generate it in one click.
4. The QR code image turns green meaning it has been created for your asset!

Just scan the code in the field to get asset details, history & documentation.
Create and manage your asset QR code from your mobile App, on smartphone or tablet (cont.)

**MANAGE:** then, you can manage your asset QR code directly from your App

1. Select “Overview” in your “Asset detail” menu
2. Click on the QR code green icon
3. ...Visualize and “Export” or “Delete” QR code
Create Qr code from your Web portal

Regarding your Tree structure and the needs of your organization, you can either associate a QR code for a single asset or a group of assets, and then generate and print it simply.

1. From the overview click on + button and on “Manage Qr code”
2. Choose either to generate and print your Qr codes or just generate it without printing
3. Select the scope of equipment you want to generate and print Qr codes
Create QR code from your Web portal (cont.)

4

Select the format you want to use:
- Standard
- Standard with asset name
- For Pre-fabricated sticker

For pre-fabricated stickers, we recommend Brady BBP12 QR code printer and its consumables.

<table>
<thead>
<tr>
<th>Items</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brady Printer BBP12</td>
<td>Y4185460</td>
</tr>
<tr>
<td>Prefabricated sticker with Schneider Electric logo</td>
<td>Y-4850245</td>
</tr>
<tr>
<td>Prefabricated sticker without Schneider Electric logo</td>
<td>Y-4850246</td>
</tr>
<tr>
<td>Color ribbon</td>
<td>Y961570</td>
</tr>
</tbody>
</table>
Create manual readings for an asset

You can use EcoStruxure™ Facility Expert to collect readings, such as consumption measures or temperatures. Thanks to your App, you can store them automatically in your asset library, avoiding painful paper reports or potential error while improving operational efficiency of your team.

1. On asset detail, scroll down and select "Settings"

2. Click on "+" to add a new measure

3. Name your measure by entering or selecting a name
Create manual readings for an asset (cont.)

You can use EcoStruxure™ Facility Expert to collect readings, such as consumption measures or temperatures. Thanks to your App, you can store them automatically in your asset library, avoiding painful paper reports or potential error while improving operational efficiency of your team.

Choose the "Category" and units

You can create several measurements per asset

Your new measure is now created and attached to an asset
Attach a file

A file attached to an asset is automatically stored in your library. It can be a user manual, a picture, an audio file, a report, etc. Any useful information for the asset owner or the operator.

1. On "Asset detail" select "Attached files"
2. Click on "+
3. Choose the type of file you want to attach
4. Click on "OK" to validate
5. Your new file is now attached to your asset

On mobile phone we propose by default to attach a picture

TECHNICAL RESTRICTION: From mobile device, you can attach audio file and picture. From the web portal, you can attach any type of files (Office files, pdf, picture...) in the limit of 30 Mo.
Apply Schneider Electric asset templates

For some products, pre-defined maintenance tasks and documentation are ready to be applied to assets. This is the case for Premset or MasterPact for instance.

1. Click on the button “Apply Template” and activate it.

2. Predefined preventive maintenance tasks and User manual have been automatically imported in the “Tasks” menu of your Schneider Electric asset.

Product documents: imported Schneider Electric documentation

My documents: uploaded documentation (photo, documents etc…)

Downloading the template with maintenance plans is recommended for Schneider Electric assets.

Please note that you cannot apply 2 Schneider Electric maintenance templates on the same asset.
Create a tasks for several assets

Save time by applying a newly created task and its actions list to several assets.

1. On "Overview" click on "Task".
2. On your task list click on "+".
3. Then click on "Asset(s)".
4. Select equipment on which you want to apply the task and click "OK".
5. The new task will apply to each selected asset.
Duplicate tasks for an equipment

Save time by duplicating a task and its actions list for one asset.

1. On "Asset detail" select "Tasks".
2. Select the task you want to duplicate.
3. Swipe to the left to duplicate it.
4. Confirm duplication.

On "Asset detail" select "Tasks".
Retrieve Schneider Electric product information in your App by scanning product QR code

EcoStruxure Platform
Capabilities simplify the discovery and onboarding of an increasing number of Schneider Electric products that are configured to communicate in a simple way with EcoStruxure™ Facility Expert.

By scanning the Schneider Electric QR code on the asset you can quickly transfer its characteristics and related documents:

- Asset nameplate with picture, reference, serial number and brand
- Technical documentation: user and maintenance guides, single line diagram or drawings
- Maintenance plan

Note: Note that QR code image itself can’t be imported. To get the best of your App by sharing history of intervention, maintenance plans, attachments etc. with your community, you should generate a QR code from your App and stick it on the asset.
Retrieve Schneider Electric product information in your App by scanning product QR code (cont.)

1. Select "Scan a QR Code" on your quick access UI
2. Click on "Yes" in the pop-up – See below
3. Reference, serial number and brand are automatically fulfilled
4. Enter additional information related to your asset: name, maintenance tasks, attachment
5. Your asset is created and a new QR has been paired to your asset!
Retrieve information on your asset or switchboard in your App by scanning a panel QR created with EcoStruxure Power Commission

If a QR code had been created with EcoStruxure Power Commission and placed on the switchboard during its conception phase, you can scan it with your app and request an access to all the information you need to operate and maintain your electrical facility.

Design docs:
- Single line diagram
- Selectivity setting

Switchboard docs:
- CAD Drawings
- Switchboard photos
- User manual
- Wiring schema
- Bill of material
- Device serial number

Commissioning docs:
- Device password
- IT network configuration
- EcoStruxure Power Commission project report & test report

Maintenance docs:
- Maintenance plan
- Maintenance guide
- Spare part lists
How it works

1. With EcoStruxure Power Commission, Panel Builders commission the switchboard and create QR code.

   Set up and test all the connected devices in your electrical panel with EcoStruxure Power Commission.

   QR code is the unique identifier of the switchboard, for immediate collaboration and access to upload historical information of the equipment.

2. Then, they export the project to EcoStruxure Facility Expert to share it with collaborators from their communities.

   Share the project with EcoStruxure Power Commission and seamlessly export the data to EcoStruxure Facility Expert.

NOTE: Enter customer and site node information of a switchboard in EcoStruxure Power Commission and retrieve the asset hierarchy in EcoStruxure Facility Expert.
EcoStruxure™ Facility Expert
For operations

I CREATE

I register a new asset manually
I save time when creating maintenance tasks

I download an asset from SE resources repository
By scanning SE products QR code
By scanning a panel QR code created with EPC

I activate services

I START

EcoStruxure™ Facility Expert
For operations

How it works (cont.)

3 With EcoStruxure Facility Expert, retrieve the documents of the switchboard configuration

4 Provide customer access at panel delivery

5 With a settled up preventative maintenance plan

The online community can now upload useful document and information for the complete life cycle of the equipment, including construction, installation and maintenance history.

Clients and/or facility managers' access to the convenient and up-to-date information of the tagged equipment via the QR code.

With EcoStruxure Facility Expert the digital community can automatically access the primary maintenance plan, schedule operations, log activities and share reports.

Learn more about the Digital Logbook solution

schneider-electric.com
Retrieve the asset or switchboard information by scanning a panel QR code with EcoStruxure™ Facility Expert

If you are the first to scan the QR code with your app, you can add this new switchboard to your library by following the step-by-step wizard.

1. Click on "Start Creation".

2. Customer name and site information are automatically implemented.

3. If necessary, you can add users allowed to access the switchboard data.

4. Maintenance plan is automatically applied, and all switchboard documentation is available.

Reference, serial number and brand are automatically filled, and QR code is paired to your switchboard.

Note: By a simple click on the link “See all sub-assets”, you can access the details of the electrical components installed in the panel.
Retrieve the asset or switchboard information by scanning a panel QR code with EcoStruxure™ Facility Expert

As a user having the ability to obtain the switchboard information, you can simply use EcoStruxure™ Facility Expert to scan the QR code to access this equipment's digital twin:

1. Open EcoStruxure™ Facility Expert on your phone
2. Scan the QR code
3. Access all the information, maintenance plan and attached files, gathered in a simple QR code

Information will be available only if you already share this asset.
Retrieve the asset or switchboard information by scanning a panel QR code with EcoStruxure™ Facility Expert

If the equipment is already owned by a Facility Expert user, you must request access to the asset information.

1. **ACCESS REQUEST**
   - When scanning QR code... You are instantly notified and can identify the current owner to request an access.

2. **ACCESS APPROVAL**
   - The owner is notified and can decline or accept the request.

3. **ACCESS REQUEST**
   - The owner can choose to transfer the digital asset or to grant access as collaborator.

If you transfer the digital asset, you still access it as a team collaborator.

If you grant access, you still access it, and the requester will be a new collaborator.

Learn how to “Transfer ownership”
Introduction: EcoStruxure™ Facility Expert, non connected and connected features

CLOUD TECHNOLOGY HELPS YOU MAINTAIN YOUR NON CONNECTED ASSET THANKS TO:

- Asset and switchboard information available from the field through QR code
- Maintenance status and localization at a glance
- Edition and automatic storage of intervention reports
- Actionable task manager with long term maintenance schedules & reminders
- Collaboration features

Using digital logbook and task manager free features of EcoStruxure™ facility Expert helps you improve asset maintenance on your installed base and support your day to day efficiency.

IN ADDITION, IoT TECHNOLOGY CONNECTS YOU TO YOUR EQUIPMENT AND BUILDINGS 24/7 TO:

- Monitor remotely all your electrical, HVAC or key equipment installed in single or multisite buildings
- Better anticipate operations with data trends on assets
- Receive smart alerts with actionable data 24/7

EcoStruxure™ Facility Expert – operations helps you improve your customers’ business continuity and opens up new service offering opportunities.
The Voltage loss alert solution from EcoStruxure™ Power provides Facility Managers with local and remote visibility if an electrical outage or abnormal voltage phase conditions have occurred.

It makes voltage status inspection faster and diagnosis more efficient than ever, preventing equipment damage, and helping the operation team to respond without delay.

Native Connectivity for Power Availability application helps you minimize business disruption in event of electrical outage.

To learn more about Native Connectivity for Power Availability refer to EcoStruxure Power Application Note.
Service Activation for PrismaSet Active wireless panel server

1. Scan the QR Code located at the top of the panel with your app feature "Scan a QR code".

2. The activation wizard appears with the list of communicating devices if there are any. Click on "Start activation".

3. Start by pressing and holding the button located at the top of your panel for 5 seconds.

4. The indicator light will go from solid orange to flashing green for the duration of the commissioning. Click on "Next" once this is done.

If you don’t already have an account, you will be proposed to create one.
Service Activation for PrismaSet Active wireless panel server (cont.)

5. Choose between "I activate my panel" or "Activate the panel for a customer".

6. Enter the name of the customer who will own the PrismaSet Active panel. Click on "Next".

7. Confirm that you have received consent from your customer to access his equipment data. Click on "I obtained the consent" to continue.

8. Create or select the switchboard site.

9. Localize it by entering the address manually or using GPS location.

10. Click on "Next" once this is done.
Service Activation for PrismaSet Active wireless panel server (cont.)

11a

Select a **subscription** or/and enter your code received by email to activate the license. Click **ok** to validate.

10

If communicating devices are installed, select "Temporary period" or "Subscription plan" regarding your needs.

11b

Or **Temporary** license to finalize the setting before transferring the panel to the operation team.

---

**To get an activation code**, Schneider Electric recommends purchasing a subscription from your local sales representative or distributor.
Service Activation for PrismaSet Active wireless panel server (cont.)

12. Add the email addresses of the users who should be notified through Facility Expert in the event of voltage loss on the panel.

13. Click on "Complete activation".

14. The panel will then finish its activation by attempting to connect to the cloud via the LoRa network.

All phases LED indicators are now active and the connectivity symbol is green.

If the users do not have Facility Expert, they will receive an email inviting them to download the app.
Service Activation for PrismaSet Active wireless panel server (cont.)

Your PrismaSet Active panel is created and you will be notified in case of issue.

On the panel, the led indicators will help you identify the voltage or communication issue.

Discover other alerts
Commission other Schneider Electric gateways: smart assets and Com’X gateway

By connecting your equipment you are able to:

- Collect information to monitor equipment status change or trends for one or more buildings
- Optimize your alerts: preconfigured, customs, data trending (T°C, running hours, voltage, current)
- Be alerted with actionable data directly on your mobile device
- Plan intervention regarding the emergency: create and assign new task or post-pone maintenance

There are different modes to collect data of your connected assets:

- For smart assets with HTTPS and email capability (machine to machine mode)
- By commissioning a Schneider Electric Gateway such as Com’X or PowerTag Link C

Issue can also be raised manually from the field by changing the asset status accordingly.

To get the best of your connected assets by receiving alerts you should subscribe to EcoStruxure™ Facility Expert – Operations.

Learn more details about subscriptions:

For data logger commissioning refer to EcoStruxure Power commissioning guide

Find more details about subscriptions:
With the connection of the room controller SE8000, EcoStruxure Facility Expert provides now monitoring and control of Rooftop units (RTU) with simplified views for building managers to enable them to ensure easily comfort in the zones, and advanced views for maintenance teams and mechanical contractors to avoid them going on site by checking and modifying remotely setpoints/parameters of the machine.
Commission other SE gateways: SE8000 room controller (cont.)

1. Create customer site and register gateway on EcoStruxure Facility Expert Webportal.

2. Connect to SE8000 webpages and setup the room controller.


[Diagram of steps 1-3 with images of computer screens showing the process]

Learn more about Connecting SE8000 to Facility Expert

schneider-electric.com

Discover HVAC equipment
Create alert rules for smart asset with https or email capability

**Machine to Machine mode**, allows you to connect your smart assets directly from your App in order to receive automatic notifications in case of dysfunction or status change.

1. Once the toggle button activated, go on “Asset detail” menu and select “Alarm settings”
2. Enable the alarm
3. Enter unique asset unique identifier (ID)
4. Edit key words Note that key words are case sensitive
5. Confirm with “OK” or “Edit” your settings

Alerts can also be generated manually from the field changing the asset status accordingly. See “Raise a detected issue” chapter.
Notifications rules

Asset status will change in EcoStruxure™ Facility Expert according to the key words in the message body sent by your smart asset.

- If **Trip** or **Pretrip**: asset status changes to red
- If **Overload**: asset status changes to orange

Now, your asset can notify you in case of dysfunction by:

**CASE 1**

Asset identifier: **sender email**
(e.g. smartlink32e1@schneider-electric.com)

Email has to be sent to:
EcoStruxure™ Facility Expert email box:
events.ecostruxurefacilityexpert@schneider-electric.com

**CASE 2**

Asset identifier: **alphanumeric characters**
(e.g. amacaddress or serial number)

Request has to be sent to:
https://m2m.facilityexpert.schneider-electric.com/https/<assetidentifier>
Method: POST
Header: Content-Type: application/json
Body in JSON format: {
    "message": "message with key word"
}
I OPERATE

I share information & collaborate

I operate assets & manage tasks

I access history & asset trending

I manage my assets library

I receive alerts from my equipment

I OPERATE MY HVAC EQUIPMENT
User profiles

Set up & manage users

- Add a new user
- Change user profiles
- Manage scope of assets
- Contact your community
- Remove user
I OPERATE MY HVAC EQUIPMENT

Find an asset

- Filter by status
- Through Search
- Through Asset Menu

Duplicate an asset

Update asset information

- Associate QR code
- Add a picture
- Edit information

Delete an asset

Transfer an asset

Leave asset access

I OPERATE

I SHARE

INFORMATION & COLLABORATE

I access history & asset trending

I manage my assets library

I receive alerts from my equipment

I operate my HVAC equipment

I manage my assets library
I OPERATE

Maintenance reminder

Asset alerts

Alerts sent from PrismaSet
Active wireless panel

Other example of asset event alarms

Conduct preventive maintenance or troubleshooting

Execute operation

I OPERATE MY HVAC EQUIPMENT
I operate

Share information & collaborate

Access history & asset trending

I manage my assets library

I access my HVAC equipment

Access data trending from your devices

- Asset condition monitoring
- Temperature monitoring
- Energy monitoring

Receive alerts from my equipment
I OPERATE MY HVAC EQUIPMENT

- Monitor and control HVAC equipment
  - I operate multi-site buildings
  - I operate a zone
  - I operate equipment (e.g., Rooftop Unit)

I OPERATE

- I operate assets & manage tasks
- I receive alerts from my equipment
- I access history & asset trending

I SHARE

- In information & collaborate
- I access history & asset trending

I MANAGE

- My assets library
- I receive alerts from my equipment
- I access history & asset trending
EcoStruxure™ Facility Expert mobile application runs in Online or Offline mode.

During maintenance operations, technicians may be out of mobile network areas but they can still access asset detail and add information.

In offline mode, assets' attachments are not accessible.

As soon as the smartphone detects a mobile network, it will automatically update the new logged information.

Now, with your assets managed by EcoStruxure™ Facility Expert, you can:

- **Share information** with all your community members and improve operational collaboration
- **Manage your asset library** from your App
- **Geolocate your Park of assets** to improve efficiency of your day to day activities
- **Log information and document maintenance** in the field
- **Manage issues** faster than ever thanks to history of asset, events, and data trending analysis capability
EcoStruxure™ Facility Expert is your dependable partner to strengthen the effectiveness of your team and share information with your customers or contractors.

Thanks to the community features, onsite personnel can count on live support from experts or teammates if needed, receive notification, share event logs with the other contributors and generate operations reports available for viewers.
Set up and manage user profiles through your App or Web portal.

**EcoStruxure™ Facility Expert** propose profiles with adapted and restrictive abilities regarding your effective relationships with your Team, Customers or Collaborators, whether they are Panel Builders or Contractors.

### List of Abilities by User Profiles

- **Manager(s)**
  - Have full access: including adding, editing and deleting assets, tasks, reports.
  - Only role who can manage users community including profiles and scope of the assets.
  - Can access all assets.

- **Technician(s)**
  - Can access to assigned assets and may create logs and complete tasks on these assets.
  - No ability to manage community of users.

- **Collaborator(s)**
  - Have same rights as technician but cannot view community of users.
  - Only role which can be part of multiple teams.

- **Client manager (ex: technical manager)**
  - Can only view assets data.
  - They cannot edit anything.

- **Client viewer (ex: business owner)**
  - Can view asset data, add information related to these, create tasks, collect readings and raise issues.
New EcoStruxure™ Facility Expert user

1. From overview page click on "Community"
2. Select "Community"
3. Click on "+
4. Enter his/her email

From overview page click on "Community"
Select "Community"
Click on "+
Enter his/her email
5. Select his/her role in the list: Manager, Technician, Client Manager, Client Viewer, Collaborator.

6. Select assets within his/her scope of work and confirm selection.

The new team member will receive an email inviting him/her to join the team.

If you add a Manager profile to your team, he will automatically have access to all your assets.

In Facility Expert App, this user will be pending until he/she has created and activated his/her account.
Change user profiles

1. Find the user you want to modify his/her role in the list
2. Click on icon on the right
3. Click on "Change role"

Note: only users with a manager profile can modify user role
Change user profiles (cont.)

4. Choose his/her new role in the list.

5. Click on "OK" button to save it.

As soon as you have modified the user role, he/she will access to new set of functionalities accordingly.

Note: only users with a manager profile can modify user role.

You can not change profile to Collaborator role.
Manage scope of assets for each user

1. Find the user for who you want to modify the scope of assets in the list
2. Click on icon on the right
3. Click on “Edit assets”
4. Select those assets you want to share with the user by navigating in the tree view and click on “OK”

All managers will have access to the assets of your account. You will not be able to change their scope of assets.
Contact your community

Your App now offers you the capability to easily contact any user of your team: colleagues, customers or contractors.

1. Find the user you want to contact in the list
2. Click on icon on the right
3. Decide to call your contact or to send her/him an email
4. Write and send your message

To activate direct "Call" capability users have to enter their phone number in:
Settings > Profile in the App
Remove a user from your team

1. From your team member list, find the user you want to remove.

2. Click on icon on the right.

3. Click on "Remove".

4. Confirm "Yes".

Only "manager" profile can remove a user from the team.

Once you have removed someone from a team, the user will not be able to access to your account and assets anymore. However, you can always use the "Add user" capability of your App, to add them back to the team later on.
In your EcoStruxure™ Facility Expert asset library, you can easily find one of your assets, modify it, delete it or transfer this asset ownership to another user.
Find an asset in your library

1. From "Overview", click on "Assets".
2. Then select the asset from the list.
3. Otherwise, scroll down to show the search bar and type in the asset name.
Find an asset filtering by status

EcoStruxure™ Facility Expert helps you localize your assets and identify their status at a glance, supporting you in planning the best and most efficient truck rolls for your team.

You can easily:
- Localize your assets and filter them by status
- Enter your asset name to check its status
Find an asset filtering by status

1. On overview, you will see **Alert** and **Alarm** status displayed by default.
2. Click on asset status bar to select the **criticality** you want to display.
3. Filtering assets by status disable other statuses in your list as well as on the map.

- Through Search
- Through Asset Menu
- Duplicate an asset
- Delete an asset
- Transfer an asset
- Leave asset access
- Update asset information

**I OPERATE**
- I share asset information & collaborate
- I manage my assets library
- Find an asset
- Filter by status
- Find an asset filtering by status
- Through Search
- Through Asset Menu
- Duplicate an asset
- Delete an asset
- Transfer an asset
- Leave asset access
- Update asset information

**I start**
EcoStruxure™ Facility Expert
For operations

**I OPERATE**
- I share asset information & collaborate
- I manage my assets library
- Find an asset
- Filter by status
- Find an asset filtering by status
- Through Search
- Through Asset Menu
- Duplicate an asset
- Delete an asset
- Transfer an asset
- Leave asset access
- Update asset information

**I operate**
- I receive alerts from my equipment
- I access history & asset trending
- I operate my HVAC equipment
Find an asset filtering Through Search

4. Scroll down to search asset by name if needed

5. Then, access asset detail and all related information
Find an asset by searching through Asset Menu or Tree view

1. On asset view, select the asset you are looking for in the list.
2. Or scroll down to enter asset name.
Find an asset by searching through Asset menu or Tree view (cont.)

View asset detail…

… Or navigate in your tree view, customer or building/panel/breaker for instance, until you find the asset.
Duplicate an asset with its maintenance plan

To avoid creating maintenance tasks for similar equipment you can simply duplicate the same asset already stored into your library and all the associated tasks will be duplicated with it.

1. Click on "Assets"
2. Scroll on the list to find the asset you want to duplicate
3. Select the asset
4. Then, swipe to the left on the asset and click the blue "copy" icon

- Attached documents are not duplicated as they are contextual information.
- Maintenance tasks keep their periodicity but you must still select the first occurrence and assign the task to a contributor.
Duplicate an asset with its maintenance plan

To avoid creating maintenance tasks for similar equipment you can simply duplicate the same asset already stored into your library and all the associated tasks will be duplicated with it (cont.).

5. If needed, enter the new asset name

6. Enter the quantity of assets you need to duplicate

7. By checking the box you duplicate all related assets

8. Click on "OK" to validate

- Attached documents are not duplicated as they are contextual information
- Maintenance tasks keep their periodicity but you must still select the first occurrence and assign the task to a contributor.

Duplicate an asset with its maintenance plan
Delete an asset from your library

1. Click on "Assets".
2. Scroll on the list to find the asset you want to delete.
3. Select the asset.
4. Then, swipe to the left on the asset and click the red "bin" icon.
5. Confirm the deletion.
Transfer an asset

1. In your list, select the asset you would like to transfer.

2. On its "Asset detail" overview, click on "Community".

3. Click on the "transfer" icon.

Note: asset transfer option is only available for an asset created in EcoStruxure™ Facility Expert mobile App.

Note: When you transfer ownership of an asset, all related assets ownership will be transferred too.

Find more details about "user profiles"
Transfer an asset (cont.)

4. Enter the team managers' email

5. Select **keep or lose access to this asset**

6. The asset now appears as 'Shared' in your library

Note: When you transfer ownership of an asset, all related assets ownership will be transferred too.
**Leave asset access**

As an external collaborator you can decide to leave this asset access if you don’t need to access its information anymore.

1. On your asset list, open the tab “Shared with me”
2. Select the asset and swipe to the left
3. Confirm that you want to leave this asset access

As an external collaborator you can decide to leave this asset access if you don’t need to access its information anymore.
Associate an existing product QR code or a picture for an equipment already created in Facility Expert

1. On the “Overview” tab of the asset, click on the QR code black icon.
2. Scan the existing product QR code with your App.
3. Associating this QR code with an equipment already registered in your library will turn QR code icon from grey to green.

- Find an asset
- Duplicate an asset
- Delete an asset
- Transfer an asset
- Leave asset access

- Update asset information
  - Associate QR code
    - Add a picture
    - Edit information

- I operate assets & manage tasks
- I receive alerts from my equipment
- I access history & asset trending
- I operate my HVAC equipment
Add a picture from the field

1. On asset detail view, click on the asset picture to add, change or delete it.
2. Click on the "+" button.
3. Take a new photo or select one in your gallery.
4. Click on "Close" to implement your choice.

- Add a picture
- Edit information
- Add a picture & manage tasks
- Receive alerts from my equipment
- Access history & asset trending
- Operate my HVAC equipment
Edit information

1. On “Asset detail” view, click on “Overview”
2. Click “Edit”
3. Enter or modify asset characteristics, such as asset id for instance
4. Click “Ok” to confirm changes
Introduction

In case of asset alert or alarm, EcoStruxure™ Facility Expert is your dependable partner.

Wherever you are, get access to equipment information and manage its reference document library.

Organize trouble shooting with your team and remotely monitor operation.

Personnel sent to site gets live support from teammates and other experts.

Graphic interface enables quicker understanding while lowering stress.

As soon as trouble is fixed, the event log, including pictures, is stored ensuring traceability and a report for customer can be generated and stored too.
Introduction: what is a log, what is an issue?

When operating on site, you can create a log to describe and store intervention data. A log will trace actions performed in relation to an asset and store them in the asset log history. You can complete information, readings or attach a file to detail the log.

While working on site you detect an event that requires intervention, but you do not necessarily have time or competency to solve it. In this situation, you can report an asset-related issue, and if you are the team manager, schedule and assign this new task to solve the event.
Log information about an operation

Easily log your operations in the field to ensure traceability and prove compliance with applicable regulations (asset status, date, description, duration, pictures).

1. From “Overview” page, click on “+”
2. Select “new log”
3. Select the asset on the list
4. Complete information about the log

Logs are associated to assets only, not to folders.
Log information about an operation (cont.)

Easily log your operations in the field to ensure traceability and prove compliance with applicable regulations (asset status, date, description, duration, pictures).

5. Date, duration

6. Describe what has been done on this asset

7. Click on "OK"

Logs are associated to assets only, not to folders
Manual readings can be logged and associated to an asset

You can easily collect readings in the field with your EcoStruxure™ Facility Expert mobile App.

1. Click on shortcut "New reading" on quick access interface
2. Choose the asset or the meter – Only assets with manual reading created will be displayed
3. Visualize the last value collected and manually enter the new one – It’s done!
4. Click "OK" to confirm. You can also delete readings if necessary

- You can create several measurements per asset
- You cannot modify the creation date of the manual entry
- You can view the measurement list in the “History” section on each device

You can easily collect readings in the field with your EcoStruxure™ Facility Expert mobile App.
Report an asset-related issue

1. From "Overview" page click on "+".
2. Select "New issue".
3. "Select criticality" (e.g. alarm = red).
4. Select the "Asset".

Discover how EcoStruxure™ Facility Expert can help you to analyze and solve the issue.
EcoStruxure™ Facility Expert
For operations

I OPERATE

- I share asset information & collaborate
- I manage my assets library
- I operate assets & manage tasks
  - Log information about an operation or report an asset-related issue
    - Log information about operation
    - Log manual readings
  - Report an asset-related issue
    - Manage tasks
    - Generate reports
  - I receive alerts from my equipment
  - I access history & asset trending
  - I operate my HVAC equipment

I CREATE

I START

I OPERATE

SUMMARY

APPENDIX

Report an asset-related issue (cont.)

1. Describe the issue
2. If needed, add a picture or a voice memo
3. Click on “OK”
4. All your team will be notified

Log information about an operation or report an asset-related issue

Report an asset-related issue

Log information about an operation
Log manual readings

Manage tasks
Generate reports
I receive alerts from my equipment
I access history & asset trending
I operate my HVAC equipment

Discover how EcoStruxure™ Facility Expert can help you to analyze and solve the issue.

Report an asset-related issue

Log information about an operation
Log manual readings

Manage tasks
Generate reports
I receive alerts from my equipment
I access history & asset trending
I operate my HVAC equipment

Discover how EcoStruxure™ Facility Expert can help you to analyze and solve the issue.

Report an asset-related issue

Log information about an operation
Log manual readings

Manage tasks
Generate reports
I receive alerts from my equipment
I access history & asset trending
I operate my HVAC equipment

Discover how EcoStruxure™ Facility Expert can help you to analyze and solve the issue.

Report an asset-related issue

Log information about an operation
Log manual readings

Manage tasks
Generate reports
I receive alerts from my equipment
I access history & asset trending
I operate my HVAC equipment

Discover how EcoStruxure™ Facility Expert can help you to analyze and solve the issue.
Filter tasks

In your task list, a tag is associated to acknowledge its category: preventive, reactive, inspection or other.

From your task manager you have the capability to filter the tasks you want to access:
- Assigned to you
- Not assigned
- Unread
- Undated tasks
- Next 3 months tasks
- Late tasks
- Preventive tasks
- Reactive tasks
- Inspection

By default, a task created from an alarm, alert or manual issue is tagged as "reactive".

Learn how to assign a category to the task when you “Set up maintenance plan”.

You can activate several tags to filter your tasks, if needed.
Complete a task

When a new task has been assigned to you:
- You receive a notification
- Or you may want to access your task manager to check tasks that have been assigned to you.

Open task detail to view the list of actions you must perform to complete the task.

Fix asset alert or alarm
Complete a task (cont.)

When a new task has been assigned to you:
- You receive a notification
- Or you may want to access your task manager to check your tasks

1. Check the actions list while performing intervention
2. Enter duration of the intervention
3. Attach a file and add a comment if needed
   Your community will be notified that the intervention has been done

Fix asset alert or alarm
Complete a task (cont.)

When a new task has been assigned to you:
- You receive a notification
- Or you may want to access your task manager to check your tasks.

You can access the task completed detail in your asset History, and generate its related intervention report.
Modify task occurrence: modify one occurrence

1. Select a task and in Task details click on Edit
2. Choose Current
3. Change and enter a new date
Modify task occurrence: modify all occurrences

1. Edit task
2. Choose All

Then set up a new maintenance plan

Learn how to set up a maintenance plan
Generate reports introduction

EcoStruxure™ Facility Expert helps you to ensure maintenance traceability and to prove compliance with applicable regulations to your customers by generating intervention or summary reports. In a single click you can generate detailed reports in the field and thus, reduce administrative tasks and demonstrate that the job is done.

MAIN INFORMATION OF YOUR SUMMARY REPORT ARE:

- **Key figures**
  - Assets status at generation date
  - Logs details over the period (number of inspections, total duration, number of contributors)
  - Main alerts/alarms KPI

- **Asset synthesis**
  - Site details
  - Logs over the period (asset, log description, date, status, duration)
  - Late/upcoming maintenance tasks of the next 3 months (asset, task, date)
  - Measures (asset, measure, date, value)

MAIN INFORMATION OF YOUR INTERVENTION REPORT ARE:

- **Asset nameplate**
  - (name, address, type, asset type, brand, model, reference, serial number, commissioning date, lifetime, firmware, asset id)

- **Log details**
  - (contributor, company, date, hour, time spent, attachments, description)

- **List of tasks done**

Create and send Operation Reports
EcoStruxure™ Facility Expert
For operations

Customize your summary or log reports

From your tablet or web portal you can customize your operations reports with your company name, company logo and color.

1. Go to your “Settings” menu and select “Report customization”
2. Enter your COMPANY NAME
3. Choose your company logo
4. Select the REPORT TITLES COLOR
5. Save your reports customization

Customized information will be used in SUMMARY REPORTS and LOG REPORTS.

Note: this function is not available from your smartphone.

Your logo file must be consistent with following recommendations:
- width from 1500px to 2500px,
- height from 250px to 350px and
- size not exceed 5 Mo,
- format may be either JPEG or PNG.

From your tablet or web portal you can customize your operations reports with your company name, company logo and color.

- Generate Intervention reports
- Generate Summary reports
- Access all your reports
- I receive alerts from my equipment
- I access history & asset trending
- I operate my HVAC equipment

EcoStruxure™ Facility Expert
For operations

Life Is On
Schneider Electric
Generate Intervention reports

After an intervention log

1. From overview page click on “…”
2. Select “Reports”
3. Click on “+”
4. Select the report type “log report”
Generate Intervention reports (cont.)

After an intervention log

5. Select equipment
6. Select one log
7. Name your report
8. Click on "Generate"
Generate Summary reports

After a log or a task

1. From overview page click on “…”
2. Select “Reports”
3. Click on “+”
4. Select the report type “Summary”

From overview page click on “…”
Select “Reports”
Click on “+”
Select the report type “Summary”
Generate summary reports (cont.)

After a log or a task:

1. Select Start/End date
2. Select assets
3. Select content (Log over a period, Upcoming tasks, measures over a period)
4. Name your report
5. Click on "Generate"
Access all your reports

1. From overview page click on "..."
2. Select "Reports"
3. Find your report in the list

Generate reports
- Customize your reports
- Generate Intervention reports
- Generate Summary reports

Access all your reports
- I receive alerts from my equipment
- I access history & asset trending
- I operate my HVAC equipment
Introduction

With EcoStruxure™ Facility Expert you get the assurance that your assets are covered under a proactive and digital maintenance program including automatic reminders that help you improve your maintenance efficiency.

**Monitoring 24/7 your equipment condition** you can even go further leveraging a cost-efficient and simple technology that enables you to be alerted whenever you are when issues arise, receive actionable data to analyze the problems, or to anticipate maintenance needs by reviewing your key assets trends.

As a result, you limit the risk of business disruption and equipment damages, and you can plan your operations wisely by taking the best of your app to manage facilities more efficiently than ever.

Upon network availability, be notified from your connected assets through:
- Preconfigured alarms with Schneider Electric equipment
- Manual settings for custom alarms on threshold
Alerts sent from PrismaSeT Active wireless panel

The Voltage loss alert service provides Commercial and Industrial buildings managers and technicians with local and remote visibility in case of electrical outage or abnormal voltage phase conditions. It makes voltage status inspection faster and diagnosis more efficient than ever, preventing equipment damage, and helping them to respond without delay.

PrismaSeT Active features

- At the top of your panel one or all the 3 indicator phases lights are off, indicating a Voltage Loss event.

Remote alarms 24/7 on EcoStruxure Facility Expert

- From the distance, the dedicated alert receiver is instantly notified and able to access the alert detail and asset information through his/her EcoStruxure Facility Expert account.

LORA connectivity is not working, the communication status indicator is flashing orange instead of solid green.

- Service is activated on cloud-based software
- Service is not activated (blinking)
Alerts sent from PrismaSet Active wireless panel

Implementing PowerLogic HeatTag sensor into PrismaSet Active helps prevent damage in electrical cabinets from overheating by analyzing gases and particles emitted by cable sheaths in case of abnormal temperature rises. The solution monitors switchboard conditions 24/7 and sends alerts, helping the operations team react quickly and anticipate on-site interventions.

**PowerLogic HeatTag:**

*Wireless sensor for early detection of overheating cables*

- **Switchboard condition analysis**
  - Receive notification for functional issues in HeatTag devices
  - Analyzes gases and micro-particles emitted by overheating cable
  - 3 levels of alerts depending on severity
  - Measures ambient temperature and hygrometry
  - Provides switchboard air quality index

- **Sensor self-diagnosis**
  - Fan maintenance alert
  - Sensor health alert

**Remote alarms 24/7 on EcoStruxure Facility Expert**

The asset manager receives remote alerts with actionable details and can access a detailed dashboard for continuous monitoring and trends to analyze switchboard condition.
Other example of asset event alarms

EcoStruxure™ Power solutions based on smart Schneider sensors, connected products and cloud-based software enable Facility Manager and operations teams to be alerted 24/7, monitor key equipment and gain visibility on energy consumption, from loads to entire building.

PowerTag Energy
Wireless sensor for load management and asset protection

These wireless power sensors provide high-density energy metering for easy load management and asset protection. They can differentiate between lighting, cooking, and HVAC usage and inform on circuit breaker trips and usage alarms.

PowerTag Ambient
Wireless sensor for temperature monitoring

These wireless temperature sensors are battery powered and are suited to installation in refrigerated environments (down to -30°C) such as cold rooms or self-contained coolers.

Remote alarms 24/7 on EcoStruxure Facility Expert

Remote alarms with actionable details
- Alert on power outage with causes identification and recommendations
- Notification on mobile devices
- Load condition monitoring
- New PowerTag installation after service activation in PrismaSet Active
I CREATE
I OPERATE
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EcoStruxure™ Facility Expert
For operations

I share asset information & collaborate
I manage my assets library
I access history & asset trending
I receive alerts from my equipment

Maintenance reminder
Asset alerts
Conduct preventive maintenance or troubleshooting
Execute operation
I access history & asset trending
I operate my HVAC equipment

Conduct preventive maintenance or troubleshooting

1. Click on the notification
2. To access asset detail helping you identify the problem with actionable information

Note: In setting/notification preference you can decide to disable notifications. Regarding alarm, alerts, task assignment, new log. Be aware that when you disable alarm/alerts notification you will not be notified in case of issue.
Conduct preventive maintenance or troubleshooting (cont.)

3. Then click on the alarm itself to change the issue status.

4. According to alarm severity you can:
   a. "Acknowledge" the issue to inform your team that the issue has been taken into account
   b. "Plan a task" and assign it to the right technician
   c. Or "Close" the issue

- More than 50% of breakdowns for a piece of equipment have already occurred and the causes are known.
- When a task is planned, EcoStruxure™ Facility Expert will propose automatically to close the issue once the task is completed.
Conduct preventive maintenance or troubleshooting (cont.)

If you decide to plan a task you can:

5. Describe the new task

6. Select or enter actions to be performed
Conduct preventive maintenance or troubleshooting (cont.)

If you decide to plan a task you can:

6. Plan intervention

7. Assign the intervention

Users must be already registered if you want to assign them a task.

Conduct troubleshooting
Execute operation

A new task has been assigned to you:

1. You receive a notification
2. Open task detail to view the list of actions to complete the task
3. Check in the action to be performed
4. Complete the task

You receive a notification
Open task detail to view the list of actions to complete the task
Check in the action to be performed
Complete the task
EcoStruxure™ Facility Expert
For operations

I START
I CREATE
I OPERATE
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APPENDIX

I OPERATE
I share asset information & collaborate
I manage my assets library
I access history & asset trending
I receive alerts from my equipment

Maintenance reminder
Asset alerts
Conduct preventive maintenance or troubleshooting

Execute operation
I access history & asset trending
I operate my HVAC equipment

I CREATE
I operate

Execute Operation

A new task has been assigned to you:

1. Enter duration of the intervention
2. Attach additional information if needed
3. Create report
4. And close the alarm

Status of your equipment changes accordingly and your community will be notified that the intervention has been performed.
Access asset history

Equipment maintenance logs provide rich historical data that can be analyzed to provide insights on an asset’s performance compared to similar devices. In addition, keeping maintenance logs updated is proof that assets are being taken care of.

From asset detail:

1. Scroll down to access “History” tab and click on it.
2. In the list, select the historical record you are looking for.
3. Or filter to access the data you need by using relevant tags:

   - Preventive maintenance
   - Reactive maintenance
   - Inspection
   - Manual readings
   - Alarms / alerts from connected assets
   - Alarms / alerts raised manually by users
Access asset data last values from your smartphone

On your Trendstab you can access the variable of the connected assets you are monitoring.

1. Scroll down to access ‘Last Values’ tab
2. Click on it
3. Access to the last data received from the cloud

Note: for pre-defined Schneider Electric assets, all the variables are predefined and set
Access asset data trending for analysis from your tablet or webApp

On your Asset "Trends" tab you can set and access graph with variable of the connected assets you are monitoring.

Note: for pre-defined Schneider Electric assets, all the graph are already set. You can create up to 7 graphs by clicking on "+" button.

With EcoStruxure™ Facility Expert you get the insurance that your assets are covered under a proactive and digital maintenance program including automatic reminders that helps you improve your maintenance efficiency.
Access asset data trending for analysis from your tablet or webApp (cont.)

On your Asset “Trends” tab you can set and access graph with variable of the connected assets you are monitoring.

1. Access asset history
2. Access data trending from your devices
3. Temperature monitoring
4. Energy monitoring

**Switchboard (Eg.):**
- main consumptions and panel ambient temperature monitoring with PowerLogic HeatTag

**Roof Top Unit (Eg.):**
- Space indoor monitoring temperature, humidity, temperature and temperature setpoints
Access **Energy index** from your tablet or smartphone.

EcoStruxure Facility Expert displays kWh index on the “Asset details” interface if any PowerTag devices are installed in the switchboard.

**Summary view of kWh usage of each PowerTag sensor at panel level**

1. Click on each PowerTag to get its Energy Index view.
2. And for each PowerTag

**Energy index**
- **375 kWh**
- **325 kWh**

**Events**
- 2 events
- Power stage detected in Restaurant light
- Power stage detected in Restaurant light

**Maintenance**
- Last test: 06/05/2023
- UnLicensed tests: 0
- Latest test
- Next test: 06/05/2023
Monitor and control HVAC equipment

With the connection of the room controllers SE8000, EcoStruxure Facility Expert provides monitoring and control of RoofTop Units (RTU).

Simplified views for building managers enable them to ensure easily comfort in the zones of the facility. Advanced views for maintenance teams or mechanical contractors to avoid them going on site by checking and modifying remotely setpoints/parameters of the machine.

In addition to all maintenance features, operating the HVAC equipment with EcoStruxure Facility Expert allows you to remotely:

- Visualize temperatures, setpoints, humidity and CO2 levels on trends
- Control comfort parameters of a zone and configuration parameters of the room controller
- Modify the schedule of the rooftop operating sequence (occupied, unoccupied periods)
- Visualize quickly the rooftop unit operating conditions on a graphic
I operate my equipment on multi-site buildings

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.
I operate my equipment on multi-site buildings

**Home Overview** to visualize your building locations on the map and quickly access to their equipment status and related tasks.

EcoStruxure™ Facility Expert UI also available on mobility.

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.
I operate my equipment on multi-site buildings

Arrow symbol to display asset library of the building

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.
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I operate my equipment on multi-site buildings

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.

EcoStruxure™ Facility Expert UI also available on mobility.

Actionable GPS pin to access asset detail with zone view
I operate my equipment on multi-site buildings

Asset Menu entry to access the list of buildings

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000
I operate a zone

EcoStruxure™ Facility Expert UI also available on mobility.

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.
I operate a zone

Arrow symbol to view and quickly edit comfort parameter in a zone.
I operate a zone

Calendar symbol to access occupancy schedule

More details about EcoStruxure™ Facility Expert - Enterprise:

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000
EcoStruxure™ Facility Expert
For operations

I OPERATE
I share asset information & collaborate
I manage my assets library
I operate assets & manage tasks
I receive alerts from my equipment
I access history & asset trending

I operate my HVAC equipment
Monitor and control HVAC equipment
I operate multi-site buildings
I operate a zone
I operate equipment (e.g., Rooftop Unit)

I operate a zone

I receive alerts from my equipment
I access history & asset trending

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control thanks to the connected room controller SE8000.

More details about EcoStruxure™ Facility Expert -Enterprise:
APPENDIX
EcoStruxure™ Facility Expert
For operations

I OPERATE
- I share asset information & collaborate
- I manage my assets library
- I operate assets & manage tasks
- I receive alerts from my equipment
- I access history & asset trending

I operate my HVAC equipment
- Monitor and control HVAC equipment
- I operate multi-site buildings
- I operate a zone
- I operate equipment (e.g., Rooftop Unit)

I OPERATE EcoStruxure™ Facility Expert UI also available on mobility.

I operate a zone

Zone dashboard:
- Status
- Occupancy
- Temperature
- Humidity
- Set points

More details about EcoStruxure™ Facility Expert - Enterprise:

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.
I operate equipment

- I share asset information & collaborate
- I manage my assets library
- I operate assets & manage tasks
- I receive alerts from my equipment
- I access history & asset trending

I operate my HVAC equipment

- Monitor and control HVAC equipment
- I operate multi-site buildings
- I operate a zone
- I operate equipment (eg. Rooftop Unit)

UI also available on mobility.

More details about EcoStruxure™ Facility Expert-Enterprise:

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.
I operate equipment

Asset nameplate: location, picture, QR code features

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.
I operate equipment

- I share asset information & collaborate
- I manage my assets library
- I operate assets & manage tasks
- I receive alerts from my equipment
- I access history & asset trending

For operations

I operate

- I operate my HVAC equipment
  - Monitor and control HVAC equipment
  - I operate multi-site buildings
  - I operate a zone
- I operate equipment
  - (e.g. Rooftop Unit)

Entry to access equipment

History

EcoStruxure™ Facility Expert UI also available on mobility.

More details about EcoStruxure™ Facility Expert - Enterprise:

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.
I operate equipment

Tasks entry to access equipment maintenance plan

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.
I operate equipment

I share asset information & collaborate
I manage my assets library
I operate assets & manage tasks
I receive alerts from my equipment
I access history & asset trending

I operate my HVAC equipment
Monitor and control HVAC equipment
I operate multi-site buildings
I operate a zone
I operate equipment (e.g. Rooftop Unit)

Community of users

More details about EcoStruxure™ Facility Expert - Enterprise:

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.
I operate equipment

- I share asset information & collaborate
- I manage my assets library
- I operate assets & manage tasks
- I receive alerts from my equipment
- I access history & asset trending

I operate my HVAC equipment

- Monitor and control HVAC equipment
- I operate multi-site buildings
- I operate a zone
- I operate equipment (e.g., rooftop unit)

Trends entry to access equipment data

EcoStruxure™ Facility Expert UI also available on mobility.

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.
I operate equipment

Control entry to access RTU parameters

By logging in with a “Site Manager” profile, you access to a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.
I operate equipment

- I share asset information & collaborate
- I manage my assets library
- I operate assets & manage tasks
- I receive alerts from my equipment
- I access history & asset trending
- I operate my HVAC equipment
- Monitor and control HVAC equipment
- I operate multi-site buildings
- I operate a zone
- I operate equipment (e.g., Rooftop Unit)

UI also available on mobility.

EcoStruxure™ Facility Expert

By logging in with a “Site Manager” profile, you access a simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000.
EcoStruxure™ Facility Expert is part of the complete EcoStruxure™ Power solution

List of pre-defined models available for Schneider Electric MV/LV products

Digital solutions tailored for services EcoStruxure™ Facility Expert subscriptions

Glossary

Cloud-based software Cybersecurity details

List of files format supported by the application

Detailed list of abilities for each User Profile
EcoStruxure™ Facility Expert is part of the complete EcoStruxure™ Power solution

**INNOVATION AT EVERY LEVEL**

### Apps, Analytics & Services
Apps, analytics, and services let you make timely, informed decisions to reduce costs and boost efficiency.

### Edge Control
Operation monitoring and information sharing, supported by a suite of Schneider Electric software, allows 24/7 control on-site and remotely.

### Connected Products
Connected products collect and send information to the second level.

---

**Learn more about EcoStruxure Power**
List of pre-defined models available for Schneider Electric MV/LV products

<table>
<thead>
<tr>
<th>ASSET TYPE</th>
<th>ASSET MODEL</th>
<th>LANGUAGE</th>
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</thead>
<tbody>
<tr>
<td>LV SWITCHBOARD / SWITCHGEAR</td>
<td>ASSET MODEL</td>
<td>LANGUAGE</td>
</tr>
<tr>
<td>EcoStruxure TM Facility Expert</td>
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</table>

EcoStruxure Power turns your Schneider Electric assets into smart products making information available on site or remotely.

Regarding the asset type and range you can access asset nameplate.
### List of pre-defined models available for Schneider Electric MV/LV products

#### ASSET TYPE | ASSET MODEL | LANGUAGE
--- | --- | ---
**CIRCUIT BREAKER (ACB)**
- EasyPact MVS
- Masterpact MTZ
- Masterpact NT/NW
- PowerPact B Frame
- PowerPact HUL Frames
- PowerPact LA LH
- PowerPact M Frame
- PowerPact P-Frame
- PowerPact Q Frame
- PowerPact R-Frame

**CIRCUIT BREAKER (MCCB)**
- PowerPact B Frame
- PowerPact F Frame
- PowerPact HJL Frames
- PowerPact LA LH
- PowerPact M Frame
- PowerPact P-Frame
- PowerPact Q Frame
- PowerPact R-Frame

**CIRCUIT BREAKER AND SWITCH**
- RN-SESH-220
- RN-SESH-110
- VVN-SESH-35
- VVJ-SESH-10
- VVJ-SESH-10

**ENCLOSURES AND ACCESSORIES**
- Actassi
- Climatys
- Climayso-Cooling units
- Spacial
- Thalassa

**CUBICLE**
- MCSet 17.5 Bus Coupler
- MCSet 17.5 Bus Riser
- MCSet 17.5 Incomer
- MCSet 17.5 Metering
- MCSet 17.5 Outgoing feeder
- HKB 12-17,5 ; 24
- SME 24 CIB
- SME 24 Switch
- SME 24 Fuse Switch
- SME 36 CIB
- SME 36 Switch
- SME 36 Fuse Switch
- FXP 17,5
- FXP 24
- FXP High
- FXP Rail on Floor
- Promset Switch
- Promset with CB
- Promset metering & other

#### ASSET TYPE | ASSET MODEL | LANGUAGE
--- | --- | ---
**BUSWAY**
- Canalis KS Junction
- Canalis KS Line
- 1 Line Busway
- Canalis KT Junction
- Canalis KT Line
- Powerbus Busway

**POWER QUALITY CORRECTION**
- AccuSine
- VarSet
- VarPlus Logic

**TRANSFER SWITCH**
- ASCO S230 Automatic transfer Switch
- ASCO Series 300 Transfer Switch

**TRANSFORMER**
- Minera oil distribution transformer
- Minera power transformer
- Trihal Cast Resin

**VARIABLE SPEED DRIVES**
- Altivar process ATV600
- Altivar Process ATV6100
- Altivar process ATV900
### List of pre-defined models available for Schneider Electric MV/LV products

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<th>ASSET MODEL</th>
<th>LANGUAGE</th>
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<td>TelSys Protect Giga</td>
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<td>Easergy P3 with Arc Flash Protection</td>
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<td>Active - Self test</td>
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<td>Onduleur monophasé</td>
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<td></td>
<td>Source centrale courant continu</td>
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</table>

EcoStruxure Power turns your Schneider Electric assets into smart products, making information available on site or remotely.

Regarding the asset type and range you can access asset nameplate.
Digital solutions tailored for services

Schneider Electric offers opportunities to leverage your unique skills, set up your own business development strategy, and offer a full range of advanced services to your customers.

With EcoStruxure™ Facility Expert cloud-based platform, not only can you optimize your maintenance efficiency by using Digital Logbook for free in your day-to-day activities, you can also expand your offering with remote operations on electrical assets, refrigeration or HVAC equipment, or propose enhanced energy services thanks to the latest IoT technology and EcoStruxure Facility Expert range of subscriptions.

EcoStruxure Facility Expert subscriptions

Choose from a variety of subscriptions to enable higher value services and to enhance your energy efficiency by connecting with and monitoring your key equipment 24/7.

<table>
<thead>
<tr>
<th>OPERATIONS FEATURES – Mobile App</th>
<th>Operations</th>
<th>Energy</th>
<th>Enterprise^2</th>
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<td>Asset inventory/reading</td>
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<td>Overall asset status monitoring and map location</td>
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<td>Asset DR code creation</td>
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<td>Asset by history and document library</td>
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<td>Asset maintenance plan (customized or ready-to-use for SE equipment)</td>
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<tr>
<td>Tasks manager features, dispatch, management, and reminders</td>
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<td>One-click reports</td>
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<td>POWER EQUIPMENT (Com’X, PowerTag Link C, PrismaSet Active)</td>
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<tr>
<td>Preconfigured alarms on MV/LV equipment</td>
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<tr>
<td>Voltage loss, overheating detection and continuous thermal monitoring</td>
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<tr>
<td>Custom alarms for 3rd party equipment</td>
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<tr>
<td>Main trends, voltage, current, temperature, hygrometry</td>
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<td>REFRIGERATION and LIGHTING EQUIPMENT (PowerTag Link C)</td>
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<tr>
<td>Alarms on cooler/freezer T°C, bad power supply, abnormal operations (On, Off, Standby)</td>
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<tr>
<td>Cooler/freezer T°C trends</td>
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<tr>
<td>HVAC EQUIPMENT (SE 8000)</td>
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<tr>
<td>Rooftop Units (RTU) monitoring and control</td>
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<td>Zone monitoring and control</td>
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<td>ENERGY FEATURES – WebPortal</td>
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<td>Energy consumption monitoring: main, usage, zone, meter</td>
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<td>Normalization factors, surfaces, degree days, open/closed period</td>
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<tr>
<td>Energy site performance vs standard</td>
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<tr>
<td>Power demand and power factor monitoring and alerts</td>
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<tr>
<td>Alert on main energy consumption over target</td>
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<tr>
<td>Multi-site monitoring and benchmarking</td>
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<tr>
<td>Mobile App for manual readings</td>
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<tr>
<td>Monthly zone cards</td>
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<td>Energy cost evaluation</td>
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<tr>
<td>Energy KPIs</td>
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</tbody>
</table>

More information on Operations or Energy Subscriptions: [schneider-electric.com](http://schneider-electric.com)

More information on Enterprise Subscription: [Exchange](http://exchange.schneider-electric.com)

1. For HVAC equipment using SE 8000 gateway, a new “Site Manager” profile has been added. By logging in with this profile, you access to a new simplified and intuitive interface for comfort monitoring and control of each zone of your buildings thanks to the connected room controller SE8000

2. 10 sites minimum are recommended for a better EcoStruxure Facility Expert – Enterprise license application.
This section explains certain words or acronyms which might be unclear to a reader who does not now the system or the environment.

**GENERIC TERMS**

**App**
An app is short for “application,” which is the same thing as a software program. It is most often used to describe programs for mobile devices, such as smartphones and tablets. In this context, refer to EcoStruxure Facility Expert.

**Web App** or **Web portal**
A web application is a program that is stored on a remote server and delivered over the Internet through a browser interface.

**Online/Offline modes**
Online or offline indicates a state of connectivity. In modern terminology, this usually refers to an Internet connection. Offline extended meaning can refer to activities performed while disconnected from the Internet. EcoStruxure Facility Expert features can be limited due to offline mode.

**MtoM/Data logger modes**
Foundations for the Internet of Things (IoT) M2M (machine-to-machine) describes any technology that enables networking devices to exchange information and perform actions without the manual assistance of humans. A data logger is an electronic device that records data over time or in relation to location either with a built-in instrument or sensor or via external instruments and sensors. Data loggers enable automatic data collection. Schneider Electric gateways and data loggers help measured data reach the power monitoring software for analysis. They are fundamental components in most power and energy management system architectures.

**Switchboard**
An electrical switchboard is an asset that directs electricity from one or more sources of supply to several smaller regions of usage. It is an assembly of one or more panels, each of which contains switches that allow electricity to be redirected. Equivalent terms appearing in this document is electrical distribution panel.

**EcoStruxure Facility Expert Ecosystem**

**Asset/Equipment**
Asset or equipment are both used as generic term for every product stored in the library. It can be either electrical or HVAC equipment. For instance, switchboards, breakers or meters are mentioned as assets in your App, as well as heat pumps or roof tops.

**Non-connected/connected asset**
EcoStruxure Facility Expert is a cloud-based platform with collaborative features that ease digital information sharing for the community of users regarding their profiles and abilities. Asset identification, localization and maintenance logbooks are available from anywhere at any time, to help manage portfolio of assets and support operators and facility managers in their day to day activity. Furthermore, thanks to IoT (Internet of Things) technology, connected assets can be continuously monitored. It enables data aggregation, status view, alerts in case of issue and to run algorithms that help analyze asset condition status. Get more details on sa.com

**Smart asset**
Ethernet-ready generation of power distribution products that make the necessary data available on site or remotely. Discover smart products on sa.com

**Asset management**
Asset management refers to asset maintenance, operations or review. It can include, localization, maintenance plan, history of operations and asset information for non-connected assets or status monitoring and trending for connected assets.

**Energy consumption**
Wages consumption and production, such as electricity, gas, thermal or water can be stored or monitored through meters.

**Notification**

**Formal informing or warning about maintenance schedules, events, logs, asset ownership, exchange, transfer.**

**Terms & Conditions/Privacy policy**
Terms & conditions (T&C) = legal document or statement which governs user rights and responsibility by using EcoStruxure Facility Expert.

**Privacy policy**
document that explains how Schneider Electric handles any customer or employee data it collects.

**EcoStruxure Facility Expert Features**

**Alerts & Smart Data**

**Alert/Alarm**
EcoStruxure™ Facility Expert notifies you when maintenance must be operated on your assets. Once registered into your library, you get a view on the status of your portfolio of assets, knowing the number of maintenance tasks that are late or must be performed within 3 months and indicating the criticality of status for your assets. Furthermore, in case of event on your connected and monitored assets you receive an alarm with actionable information that helps you manage tasks and team according to the emergency.

**Manual alert or alarm**
If you detect an event occurring to an asset while working on site, you can manually describe the issue, select criticality and alert your team by raising the issue from your mobile App.

**Manual readings**
Manual readings cover any additional measure associated to an asset that you may need to collect and store when operating or maintaining it. Manual readings can be performed on an equipment or an electrical asset. Calendar-based or predictive maintenance require record-keeping and scheduling of inspections, and performing maintenance before things break optimizes business continuity and minimizes the cost of owning and operating switchboards.

**Maintenance status**
Maintenance status indicates inspection schedules according to your assets’ maintenance plans and history of operations.

**Equipment status**
Equipment status refers to asset condition and can alert you if an issue requires corrective intervention. Issues can be raised manually from the field or preset and automated for connected assets.

**Preventative/ Reactive maintenance**
Preventative or preventive maintenance are interventions scheduled on calendar-based approach.

**Reactive maintenance**
Consists of corrective action due to an issue.

**New log/New issue**
On EcoStruxure™ Facility Expert a new log traces actions performed on an asset whereas a new issue signals an event discovered.

**Tasks**
Actions or actions list to be performed or scheduled.

**Reports**
Log or Operation or Intervention Report
Log reports details the actions performed on an asset, time spent and identifies operator. Learn more about reports in “Generate reports” section.

**Summary report**
Summary reports are asset synthesis and key figures over a period. Learn more about reports in “Generate reports” section.
Cloud-based software Cybersecurity details

EcoStruxure Facility Expert is a Mobile and Web based application. 100% of corresponding back-end services are hosted on Microsoft Azure Cloud.

SECURE DEVELOPMENT LIFECYCLE
Schneider Electric is continuously monitoring the changing security landscape of cryptography and cybersecurity to ensure that we offer the best available protections to our customers and their sensitive data.

Our development practices follow a Secure Development Lifecycle which ensure a high level of code quality and usage of up-to-date libraries in order to ensure an optimal level of Cybersecurity.

Facility-Expert application as well as all Schneider Electric cloud systems are regularly audited by an internal process which include Penetration Tests.

CERTIFIED DATA CENTERS
Our cloud services are physically deployed across multiple Microsoft Azure data centers. Microsoft data centers are world-class facilities with more certifications than any other cloud provider.

The data centers used by Facility-Expert are located in East US (Virginia), West Europe (Netherlands) and North Europe (Ireland). Certifications and compliance achievements include ISO/IEC 22301, 27017, 27018 and ISO/IEC 27001 in addition to SOC 1, SOC 2 and SOC 3. To learn more about Microsoft’s Azure data centers, please visit: https://azure.microsoft.com/en-us/support/trust-center/

DATA SECURITY AT REST
Schneider Electric follow best practices to create highly secured solution and to limit the risk of data being compromized in any meaningful manner while protecting the privacy, control and autonomy of each customer’s data independently from any other.

Our solution is including:
• Customer information (PIM: password, email, profile) is stored and encrypted in a corporate Identity Management System (IMS).
• System to system credentials and tokens are stored and encrypted in EcoStruxure™ Facility-Expert databases or in configuration files located in the Microsoft Cloud Azure.
• Customer data is encrypted at rest in Facility Expert databases.

DATA SECURITY IN MOTION
Schneider Electric with EcoStruxure™ facility Expert implement best practices as:
• All communications to and from EcoStruxure™ Facility-Expert with internal Schneider Electric systems or external third-party systems, are encrypted using HTTPS (minimum level required is TLS 1.2).
• Certificate involved in these encrypted sessions are leveraging SHA 256 secure hash algorithm.
• This also applies to communications between our on-premises data loggers (ComX, SE8000, D-PAS, B-PAS) and Schneider Cloud platform.

DATALOGGERS
All data loggers provided by Schneider Electric employ store and forward mechanisms so that no data is ever lost in the event that a network connection between the on-premises publisher and our EcoStruxure™ Facility Expert cloud services becomes unavailable. When network connectivity resumes, a parallel data stream will be initiated to back-fill any data that was collecting during the period of network unavailability.

APPLICATION SECURITY
Authentication
Customers registration, authentication and Personal Information Management (PIM: password, email, profile) are managed by the Schneider Electric global corporate Identity Management System with which EcoStruxure™ Facility-Expert is integrated using Oauth 2.0 standard.

The customers authenticate their account directly through our application login page or web portal login page based on the authentication layer Single-Sign-On (SSO) and federated identity access are available in alignment with the Schneider Electric customer relation management (CRM) system.

The Schneider Electric enforce a level of password complexity during sign-up and registration to promote secure credentials. Password policy requires: at least 8 characters with at least 1 capital, uppercase, lowercase and numeric character, and no more than two identical characters in a row.

Data remains customer ownership.

DATA PRIVACY
Schneider Electric focuses on securing data flows coming from connected products and solutions (whether they connect to non-Schneider hosts or platforms managed by Schneider Electric), and on aligning to the latest data integrity and privacy regulatory requirements such as the European General Data Protection Regulation (GDPR).

• Data policy is compliant to local regulation.
• Customer Data Use and Protection policy to be electronically signed by the Responsible of the site (Building owner, Tenant, …). No Data will be exported without this agreement.

DATA ACCESS
As EcoStruxure™ Facility Expert digital services, collaboration with technical support to troubleshoot and diagnose issues are now easier, more direct and faster than ever. Having said that, we’ve ensured that the entire interaction with our support personnel, including scope, duration and permissions are wholly under your control and are highly secure to respect your data privacy rights outlined in the EcoStruxure™ Facility Expert set of terms of use and Schneider Electric data privacy policy.

Operational processes include automatic revocation of access to our Platform to users that are leaving the company or the project, based on their corporate identity. Audit logs are in place allowing to trace actions of each support team members.

Similarly, all transaction with external systems are logged in an audit log system and can be analyze.

For any question please contact your international support team: FacilityExpert@Schneider-electric.com
List of files format supported by the application

EcoStruxure™ Facility Expert

When creating your assets library with EcoStruxure™ Facility Expert, you can detail your equipment information by attaching various type of files according to your needs: video, image, audio, document or compressed files.

Data are stored in high-performance cloud database to allow integrity and sharing with your team contributors.

You can access attachments on your Web portal and on your App when on-line.

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<thead>
<tr>
<th>VIDEO FILES</th>
<th>IMAGE FILES</th>
<th>AUDIO FILES</th>
<th>DOCUMENT FILES</th>
<th>COMPRESSED FILES</th>
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## Detailed list of abilities for each User Profile

### EcoStruxure™ Facility Expert

#### USER PROFILE

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<thead>
<tr>
<th>USER MANAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ADD/REMOVE</strong></td>
</tr>
<tr>
<td>- Add/remove a Manager</td>
</tr>
<tr>
<td>- Add/remove a Technician</td>
</tr>
<tr>
<td>- Add/remove a Collaborator</td>
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</table>

<table>
<thead>
<tr>
<th>MANAGER</th>
<th>TECHNICIAN</th>
<th>COLLABORATOR</th>
<th>CLIENT MANAGER</th>
<th>CLIENT VIEWER</th>
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<tbody>
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<tr>
<td>Add/remove a Manager</td>
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<tr>
<td>Add/remove a Technician</td>
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<tr>
<td>Add/remove a Collaborator</td>
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<tr>
<td>Add/remove clients/users</td>
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<tr>
<td>Manage access to assets per user</td>
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<tr>
<td>COMMISSIONING &amp; SETTINGS on webportal</td>
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<tr>
<td>- Create a customer</td>
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<tr>
<td>- Update customer information</td>
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<tr>
<td>- Create site</td>
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<tr>
<td>- Update site information</td>
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<tr>
<td>- Associate a subscription to a site</td>
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<tr>
<td>- Register a data source</td>
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<tr>
<td>- Create / update / delete connected assets</td>
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<tr>
<td>- Configure events settings on energy &amp; assets</td>
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<table>
<thead>
<tr>
<th>OPERATIONS FEATURES on mobile App</th>
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</thead>
<tbody>
<tr>
<td>Create / modify an asset</td>
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<tr>
<td>Delete an asset</td>
</tr>
<tr>
<td>- Add attachments to an asset</td>
</tr>
<tr>
<td>- Duplicate asset</td>
</tr>
<tr>
<td>- Be notified and access to alarm / alert in case of issue</td>
</tr>
<tr>
<td>- Acknowledge and close alarm / alert</td>
</tr>
<tr>
<td>Access to detailed asset dashboard</td>
</tr>
<tr>
<td>- Scan QR code to access asset detail</td>
</tr>
<tr>
<td>- Create / assign a task</td>
</tr>
<tr>
<td>- Complete a task</td>
</tr>
<tr>
<td>Delete tasks completed</td>
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<tr>
<td>Collect readings manually</td>
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<tr>
<td>Customize reports</td>
</tr>
<tr>
<td>Generate intervention report</td>
</tr>
<tr>
<td>Generate activity report</td>
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<tr>
<td>Request asset access by scanning QR code</td>
</tr>
<tr>
<td>Access to export data function on demand</td>
</tr>
</tbody>
</table>
This document presents general, non-binding information regarding the potential value that digitized power distribution products and solutions can bring to the user. Due to varying user situations and goals, Schneider Electric does not warranty or guarantee that the same or similar results represented in this document can be achieved. Please refer to Schneider Electric product and solution catalogs for actual specifications and performance.

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ESXUG001EN (EcoStruxure™ Facility Expert User Guide - For operations - Version 2.3)