EcoStruxure™ Facility Expert Starter Guide

For operations
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.

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.

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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.
How to use the EcoStruxure™ Facility Expert Starter Guide interface

USE THE SCROLL WHEEL TO NAVIGATE THROUGH THE GUIDE

Interactive menu in a main section

Last view

Main sections

General contents

Appendix

Title

1 Click on ...

2 Read the conditions of use

3 Click on ...

Important information

For data logger commissioning refer to EXP® commissioning guide

Life Is On

YouTube link

Web site link

Link to an other part of the document

Link to a specific appendix

Progress within a section

Click on the arrows to navigate in the part

Click on the arrows to navigate in the part
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.

Learn more about EcoStruxure Power

schneider-electric.com
EcoStruxure™ Facility Expert is a cloud based software that helps you improve operations & energy efficiency in individual facilities or across an entire portfolio of buildings.

Smart phone connectivity, collaborative technology, remote monitoring and automated alerts connects 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:

[discover](https://www.schneider-electric.com) EcoStruxure™ Facility Expert

[access](https://www.schneider-electric.com) EcoStruxure™ Facility Expert thru the web to ease asset condition review and trend analysis from the office.

[Learn more](https://www.schneider-electric.com) about 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*

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.

* This feature is available without subscription

APPENDIX
One of the key requirements of EcoStruxure architectures is underlying, end to end cybersecurity.

Schneider Electric follows local regulations and uses additional industry established frameworks where needed to conform to Cybersecurity standards, such as IEC 62443 and the ISO2700x suite, for its products, solutions, and services to guarantee security best practices at each stage of application development.

Our products are tested, validated and combined with our application to solve customer cyber security objectives.

**SECURE DATA COLLECTION WITH SMART PANELS**

Transmission flow between onsite gateways and Schneider Electric’s Data center is encrypted with cryptographic protocol (HTTPS TLS).

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

**Schneider Electric DATA CENTER**

Data is stored in a high-performance database to ensure high availability and integrity.

- Connection from Schneider Electric private network only
- Access log monitoring
- Backup and recovery procedures

**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
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
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I START

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2 Download
3 Create account & sign up
4 Set Preferences
5 Get to know User Interface

Discover the App
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

Some limitations on mobile phone or tablet depends on the operating system. Refer to compatibility recommendations on your applications’ stores.

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 smart phone 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

Note: EcoStruxure™ Facility Expert application is available for smartphones and tablet. For laptop usage, connect to EcoStruxure™ Facility Expert Web portal.

SCAN QR CODE FOR iOS OR ANDROID DEVICES
EcoStruxure™ Facility Expert account created from the web

If you create an account through EcoStruxure™ Facility Expert from the web you will receive an email describing how to download the App for mobile usage.
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.
If you are a Schneider Electric employee use your SSO to register or login EcoStruxure™ Facility Expert.
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 Preferences

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.
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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.

Click on "+" for quick access to main functions.

Be aware that there are some differences between the "+" button location on Android or iOS interface.
Overview - User Interface

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**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 list & map
Overview - User Interface

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- **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 list & map
- Access to Task manager
- Access to Community manager
- Click on “… the “More” key to access to tree view, reports and settings

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.

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- **Access to tasks list**
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Display team planning
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.

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

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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:

Create and register a new asset in your library

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

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

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Create work order for your team
Quick Access - User Interface

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Discover main keys:

Note: order of main keys differs on iOS or Android

In the field, simply scan a QR code of the equipment to access files and supporting documents of the asset
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

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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Nature of the task: preventative/reactive
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- Late tasks
- Preventive tasks
- Reactive tasks

Note: you can activate several tags at the same time if needed
Asset Detail - User Interface

For each asset, you can access:

1. Shortcuts to log an intervention, create a new task or to raise a detected issue
2. Asset information list: history, documentation, attachments, tasks, and manual readings in the settings
3. Asset nameplate: location, picture, QR code features
4. Active alerts list: actionable to access alarm detail
5. Preventive maintenance and tasks overview
Discover Asset dashboard:
Asset Detail - User Interface

Discover Asset dashboard:

Asset picture that you can customize
Asset Detail - User Interface

Discover Asset dashboard:

Asset status with criticity 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 interface with notifications and filter options](image)
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A list to navigate easily into your park of assets
Map View - User Interface

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**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

1. Register a new asset
2. Create QR code
4. Apply maintenance plan for SE products
7. Attach a file
10. Connected and non connected features

I edit alarm rules for my connected assets

3. Set up maintenance plan
5. Duplicate tasks
6. Create a task for several assets
8. Create manual readings
9. Create a new folder

1. Introduction
2. Alert rules & notifications

I download an asset from Schneider Electric resources repository

1. By scanning Schneider Electric products QR code
2. By scanning a panel QR code created with EcoStruxure Power Commission
**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.

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.
Create a new asset manually

1. Click on "More"
2. Select "Assets"
3. Click on "+" button
4. Select "New asset"

Quicker access to asset creation in the field, by using "+" button and then complete steps 4 to 11
I CREATE

Register a new asset manually

Create QR Code
Set up maintenance plan
Apply Schneider Electric asset templates
Duplicate tasks
Create a task for several assets
Attach a file
Create manual readings
Create a new folder

Connected and non-connected features

I edit alarm rules for my connected assets

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EcoStruxure™ Facility Expert

Create a new asset manually (cont.)

5. Enter asset "Name"
6. Choose asset "Parent"
7. Select a "Family"
8. Create or select an asset "Type"/"Model"

Associating a parent already registered into your list will automatically upload the asset location.
Create a new asset manually (cont.)

9. And enter additional information (brand/serial number, ref…)

10. Fill in “Location” by entering address or by geolocation

11. Additional information (can be any textual information, such as equipment password)

13. Verify through the “Overview” that your new asset is now stored in your library.

You can modify “instruction” field by editing it through the “Overview” menu of your asset, any time.
Create and manage your asset QR code from your mobile App, on smartphone or tablet

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. QR has been created for your asset!

Just scan the code in the field to get asset details, history & documentation

Create a new asset manually (cont.)

Just scan the code in the field to get asset details, history & documentation

Create QR code

Set up maintenance plan

Apply Schneider Electric asset templates

Duplicate tasks

Create a task for several assets

Attach a file

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Speed up operations with QR codes
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

Speed up operations with QR codes
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. You can either print the QR codes or copy the individually associated QR codes.

1. Select "Create a QR code"

2. Select "Generate by asset"

3. Choose the QR Code size

4. Choose on which asset you want to create a QR Code

Note that the parent QR code retrieves all associated children asset information.
Create QR code from your Web portal (cont.)

5. If you select a device tagged as “parent” in your Tree structure, select “Include related assets” if you wanted QR code to include the whole tree of assets.

6. Select “Include asset names” if you want to associate this information.

7. "Print" it on a sticker and affix it on your asset.

Note that the parent QR code retrieves all associated children asset information.
Set up maintenance plan

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

**ON ASSET DETAIL VIEW:**

1. Click on “+”
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 (preventive/reactive/other)

A tag will be associated to the task in your tasks list. By default, a task created from an alarm, alert or manual issue is tagged as “reactive”.

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- I start
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- I start
- I register a new asset manually
- Register a new asset
- Create QR Code
Set up maintenance plan (cont.)

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

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

8. Simply modify or delete title, actions names or actions 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.
Set up maintenance plan (cont.)

9. Assign the task to a member of your team and change it later if you want.

10. Select Measures associated to the task.
Set up maintenance plan (cont.)

11. Your new task is created

12. Registered in your calendar and your tasks list

Therefore, you can still manage your maintenance plans or assign the task later to a member of your team.
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.

Click on the new button “Apply Template”

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

Download 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.

Consult pre-defined list of available models for Schneider Electric MVA/LV products
Duplicate tasks for an equipment

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

1. In "Task" menu of your asset
2. Swipe to the left to duplicate the task
3. Confirm duplication

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I download an asset from Schneider Electric resources repository
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By scanning a panel QR code created with EcoStruxure Power Commission
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. Create a new task

3. Select equipment on which you want to apply the task

Register a new asset
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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 "+

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.
Attach a file (cont.)

3. Chose 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

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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.
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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Choose the “Category” and units. You can create several measurements per asset.</td>
</tr>
<tr>
<td>5</td>
<td>Your new measure is now created and attached to an asset.</td>
</tr>
</tbody>
</table>

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.
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. Click on «More»
2. Select «Assets»
3. Click on «+» and 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.

4 Name the folder
5 Fill in useful information
6 Click "OK" to confirm creation

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

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 (°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

Be aware that EcoStruxure Facility Expert is not suitable for any other application areas

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.

For data logger commissioning refer to EcoStruxure Power commissioning guide

Learn how to “Report an asset-related issue”

Find more details about subscriptions:
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. **Asset detail** menu, select “Alarm settings” in ‘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** SENDING E-MAILS

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** COMMUNICATING VIA https

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"}
Retrieve Schneider Electric product information in your App by scanning product QR code

EcoStruxure Plateform

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
- 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. Enter additional information related to your asset: name, maintenance tasks, attachment
4. Your asset is created and a new QR has been paired to your asset!

By scanning Schneider Electric product QR code
- Name: Main Inverter
- Parent: None
- Family: Electrical equipment
- Type: Circuit Breaker (ACB)
- Model: Westerly MTZ
- Brand: LVB47000
- Reference: 00003N1718810063

Consult the list of pre-defined models available for Schneider Electric MVA/V products

I download an asset from Schneider Electric resources repository
- By scanning Schneider Electric product QR code
- By scanning a panel QR code created with EcoStruxure Power Commission
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, link the project:
   - Share the project with EcoStruxure Power Commission and seamlessly export the data to EcoStruxure Facility Expert.

Learn more about the Digital Logbook solution: [schneider-electric.com](http://schneider-electric.com)
How it works (cont.)

3. With EcoStruxure Facility Expert, upload the documents of the switchboard configuration.

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

4. Provide customer access at panel delivery.

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

5. With a settled up preventative maintenance plan.

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](http://schneider-electric.com)
Retrieve the asset or switchboard information by scanning a panel QR code with EcoStruxure™ Facility Expert

As an EcoStruxure™ Facility Expert user, you see a QR code sticker placed on a switchboard and already have the ability to obtain its information. Then, you can simply use EcoStruxure™ Facility Expert 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

Speed up operations with QR codes
Learn how to “Transfer ownership”
Retrieve the asset or switchboard information by scanning a panel QR code with EcoStruxure™ Facility Expert

If you don’t already share this asset, you must request an access to its current owner.

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 APPROVAL**
   - The owner 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”
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 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 smart phone detects a mobile network, it will automatically update the new logged information.
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.

**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 team.

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

**Client manager (ex: technical manager)**
- Can only view assets data. They cannot edit anything.
New EcoStruxure™ Facility Expert user

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

Add a new user
- Change user profiles
- Manage scope of asset for each user
- Remove a user

Manage asset library
- Introduction
- Find an asset
- Duplicate an asset
- Delete an asset
- Transfer asset/Leave asset access
- Geolocate asset

Filter by status
- By search or Tree view

Operate & manage tasks
- Introduction
- Update asset information
- Log information or report an issue
- Manage tasks
- Generate reports
- Receive alarms on asset and fix it
- Access history & data trending
- Access history
- Access data trending
New EcoStruxure™ Facility Expert user (cont.)

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

6. New user is now added to your team. The guest will receive an email inviting him/her to join the team.

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

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

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

Enter new team member.
Change user profiles

1. From overview page, click on "Community".
2. Find the user you want to modify his/her role in the list.
3. Click on icon on the right.
4. Click on "Change role".

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

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- Access history
- Access data trending
Change user profiles (cont.)

5. Choose his/her new role in the list
6. Click on "OK" button to save it

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

Note: only users with Manager profile can modify user role
Manage scope of assets for each user

1. From overview page click on "Community"
2. Find the user for who you want to modify the scope of assets in the list
3. Click on icon on the right
4. Click on "Edit assets"

Learn how to transfer asset ownership from your "Asset list"
Manage scope of assets for each user (cont.)

Select those assets you want to share with the user by navigating in the tree view.

All managers will have access to the assets of your account. You will be unable 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. Go on "Team tab" to contact your community
2. Find the user you want to modify the scope of assets in the list
3. Click on icon on the right
4. Decide to call your contact or to send her/him an email
Contact your community (cont.)

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

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. Go on "Team tab"
2. From your team member list, find the user you want to remove
3. Click on icon on the right
4. Click on "Remove"

Only "manager" profile can remove a user from the team
Remove a user from your team (cont.)

Confirm “Yes” Remove a user

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.

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. Click on "More".
2. Select "Assets".
3. Then select the asset from the list.
4. Otherwise, scroll down to show the search bar and type in the asset name.
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 "More"
2. Select "Assets"
3. Scroll on the list to select the asset you want to duplicate
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.** By checking the box you duplicate all related assets

**7.** 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.
Delete an asset from your library

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

1. Click on "More"
2. Select "Assets"
3. In your list, select the asset you would like to transfer
4. Click on "Community"

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

5. Select the new manager and click on the "transfer" icon.

6. Select keep or lose access to this asset.

7. 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.

Find more details about "user profiles"
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

Collaborator(s) | Manager(s) | Technician(s)
---|---|---

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EcoStruxure™ Facility Expert

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Share information & collaborate
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Set up & manage users
Add a new user
Change user profiles
Manage scope of asset for each user
Contact your community
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Introduction
Receive alarms on asset and fix it
Access history & data trending
Access history
Access data trending

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Life Is On
Introduction

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
Filtering by status

1. On overview

2. Click on asset status bar to select the criticality you want to display
Filtering by status (cont.)

3. Filtering assets by status disable other statuses in your list as well as on the map.

4. Scroll down to search asset by name if needed.
Filtering by status (cont.)

Access asset detail and all related information
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.
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- Receive alarms on asset and fix it
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- Access history
- Access data trending

EcoStruxure™ Facility Expert

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
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 team mates and other experts.

Graphic interface enables quicker understanding while lowering stress.

As soon as trouble is fixed, complete event log, including pictures, is stored ensuring traceability and a report for customer automatically generated.
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.
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 "+" button.
3. Take a new photo or select one in your gallery.
4. Click on "Close" to implement your choice.
Update information

1. On asset detail, click on “Overview”
2. Click on “Edit”
3. Enter or modify asset characteristics, such as asset id for instance
4. Click “Ok” to confirm changes
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 necessary have time or competency to solve it.

In this situation, you can **raise an 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).

From overview page click on “+”

Select “new log”

Select the asset on the list

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.

Introduction
Find an asset
Duplicate an asset
Delete an asset
Transfer asset/Leave asset access
Geolocate asset
Filter by status
By search or Tree view

Operate & manage tasks
Introduction
Update asset information

Log information or report an issue
Manage tasks
Generate reports
Receive alarms on asset and fix it
Access history & data trending

Receive alarms on asset and fix it
Access history
Access data trending
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. **Close 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
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.
Report an asset-related issue (cont.)

5. Describe the issue

6. If needed, add a picture or a voice memo

7. Click on "OK". All your team will be notified.
Filter tasks

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

1. From your tasks 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

2. You can activate several tags to filter your tasks, if needed.

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”.

Access history & data trending
- Access history
- Access data trending
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 your tasks

Open task detail to view the list of actions to complete the task
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

2. Check the actions list while performing intervention
3. Enter duration of the intervention
4. Attach a file and add a comment if needed

Then generate and store related intervention report

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.

### Generate and store related intervention report

<table>
<thead>
<tr>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Device - Check the general condition of the device</td>
</tr>
<tr>
<td>Mechanism - Operate the device manually and electrically</td>
</tr>
<tr>
<td>Mechanism - Change the device electrically</td>
</tr>
<tr>
<td>Chassis - Check operation of CO, CT, CE position contacts and I/F auxiliary contacts</td>
</tr>
<tr>
<td>Chassis - Check operation of safety shutters</td>
</tr>
<tr>
<td>Chassis - Check IBO racking interlock between racking handle and opening pushbutton (Waterproof M7ZM7Z)</td>
</tr>
</tbody>
</table>

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.

### Generate and store related intervention report

Fix asset alert or alarm

Receive alarms on asset and fix it

Generate reports

Receive alarms on asset and fix it

Receive alarms on asset and fix it

Access history & data trending

Access data trending

Manage tasks

Generate reports

Receive alarms on asset and fix it

Introduction

Update asset information

Log information or report an issue

Manage tasks

Generate reports

Receive alarms on asset and fix it

Introduction

Update asset information

Log information or report an issue

Manage tasks

Generate reports

Receive alarms on asset and fix it

Introduction

Update asset information

Log information or report an issue
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 occurrence

1. Edit task
2. Choose All

Then set up a new maintenance plan

Learn how to set up a maintenance plan
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 of inspections, number of contributors)

- **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**
  - 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
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

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

Note: this function is not available from your smartphone

Customized information will be used in SUMMARY REPORTS and LOG REPORTS
Generate Intervention reports

After an intervention log

1. From overview page click on "More"
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"

Create and send Operation Reports
Generate summary reports

After a log or a task

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

After a log or a task

Select Start/End date

Select assets

Select content
(Log over a period, Upcoming tasks, measures over a period)

Name your report

Click on “Generate”
Access all your reports

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

With your assets connected to EcoStruxure™ Facility Expert you receive alerts when issues arise and can analyze problems with actionable data wherever you are, enabling you to decide to go on site, assign a task to a field technician, or postpone the intervention to your next maintenance visit.

Helping you to anticipate the maintenance needs of all or only key assets to limit downtime.

Upon network availability, be notified from your connected assets through:
- Preconfigured alarms with Schneider Electric equipment
- Manual settings for custom alarms on threshold
When receiving an alarm notification

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.
When receiving an alarm notification (cont.)

Then click on the alarm itself to change the issue status

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.
Manage an alarm and assign a task

If you decide to plan a task you can:

5. Describe the new task

6. Select or enter actions to be performed

Conduct troubleshooting
Manage an alarm and assign a task (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.
To operate intervention and close the alarm

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
To operate intervention and close the alarm (cont.)

A new task has been assigned to you:

5. Enter duration of the intervention
6. Open task detail to view the list of actions to complete the task
7. Check in the action to be performed
8. 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
   • Manual readings
   • Alarms / alerts from connected assets
   • Alarms / alerts raised manually by users
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.

**By default you access to the last data received from the cloud**

Click on “Trends”

**Note:** for pre-defined Schneider Electric assets, all the graph are already set. You can create up to 7 graphs by clicking on “+” button.
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. **Select the variables and period you want to display in the graph**
2. **Click on “Refresh” to generate the graph**
3. **Choose interval (logging/hour/day/week/month)**
4. **By default you access to the last data received from the cloud**
5. **You can also visualize the graph in full screen mode or delete it**

---

**Note:** for pre-defined Schneider Electric assets, all the graph are already set. You can create up to 7 graphs by clicking on “+” button.
Access asset data last values from your **smartphone**

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

1. Scroll down to access "Trends" 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.
### APPENDIX

- **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**

- **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
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<tr>
<th>ASSET TYPE</th>
<th>ASSET MODEL</th>
<th>LANGUAGE</th>
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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, technical information, maintenance plan or more.
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.

You can deliver even more value with the addition of EcoStruxure™ Facility Advisor services. Leverage advanced analytics software and services to review your customers’ building equipment performance and energy consumption, make recommendations, generate higher savings and become their trusted advisor.

More information on: schneider-electric.com

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.

More information on: schneider-electric.com

More information on: GoDigital
**Term** | **Description**
--- | ---
App | 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.
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.
Modbus logger modes | Foundation for the Internet of things (IoT) Modbus (machine-to-machine) describes any technology that enables networked 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 analyses. 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 an electrical distribution panel.
EcoStruxure Facility Expert Ecosystem
Asset/Equipment | Asset or equipment is 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 monitored as assets in your App, as well as heat pumps or roof tops.
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 trendings 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, event, logs, asset ownership 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 today you manage tasks and learn 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 temperature, distance, pressure, weight, and more.
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 logs are available from anywhere at any time, to help manage portfolio of assets and support operations and facility managers in their day to day activity. Furthermore, and thanks to IoT (Internet of Things) technology, connected assets can be continuously monitored. It enables data aggregation, status view, alerts in case of issue entities run algorithms that help analyze asset condition. Get more details on sensor.
Smart asset | Ethernet-ready generation of power distribution products that make the necessary data available on site or remotely. Discover smart products on sch.com.
Asset trends | Thru the web or from your smart devices you can review variables on the assets that you are monitoring. You can access last values collected from your phone or set graphs on your tablet or PC, selecting variables and period, to visualize and analyze trending on each connected asset.
Collaboration
Asset sharing | Asset ownership | Community features of EcoStruxure™ Facility Expert allow team members to upload, access and share information on assets. Asset ownership is dedicated to Manager profile who manages asset library. If necessary, ownership can be transferred but impacts access to asset data. Learn more about team and ownership transfer in chapter "1 OPERATE."
Maintenance
Digital logbook | Related to asset maintenance and operations, the digital logbook is a core feature of EcoStruxure™ Facility Expert. It can be initiated through QR code creation, as "Digital twin" of the asset, by aspen builder on construction phase and shared to contractors companies and Facility Managers once the building is operational. It allows team members to keep record of construction documents, user guide and maintenance schedules, helping them collaborate and easily access key information and maintenance plan which is necessary for electrical facility upkeep.
Maintenance plan | Recommended maintenance schedules and list of tasks to 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.
Maintenace status/Equipment status | Maintenance status indicates inspection schedules according to your assets' maintenance plans and history of operations. 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.
Preventive/Preventive maintenance | Preventative or preventive maintenance are interventions scheduled on calendar-based approach.
React/React maintenance | Reactive maintenance consists of corrective action due to an issue.
New Log/New issue | On EcoStruxure™ Facility Expert is a new log traces actions performed on an asset whereas a new issue signals an event discovered.
Tasks | Action or actions lists to be performed or scheduled.
Reports
Log or Operation or Intervention Report | Log report details the actions performed on an asset, time stamp 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.
**Cybersecurity details**

Cyber security at Schneider Electric are not only about our products, we have a services-led approach to Cyber Security that considers the life cycle of cybersecurity in the context of people, processes and technology in the operational technology (OT) space for the customer environment. Schneider Electric is permanently engaged to improve its digital data security processes to satisfy customer demands by protecting and defending your data.

**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. Certifications and compliance achievements include ISO/IEC 27001, 27017, 27018 and ISO/IEC 22301 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 RESIDENCY AND DIGITAL SOVEREIGNTY**
While EcoStruxure™ Facility Expert digital services are accessible worldwide, customers can base their service subscription and all subsequently related subscription data storage exclusively in one of 2 regions: the United States, or Europe.

*Note: The European instance of EcoStruxure™ Facility Expert is geographically deployed across data centers in the Netherlands and in Ireland. The American instance of EcoStruxure™ Facility Expert is geographically deployed across data centers in United states.*

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

Our solution is including:
- All Customer information (PIM: password, email, profile) are stored and encrypted in a corporate Identity Management System (IMS).
- All System to system credentials and tokens are stored and encrypted in EcoStruxure Facility-Expert databases located in the Microsoft Cloud Azure.
- All Customer functional data including time-series are segregated logically in the EcoStruxure Facility-Expert SQL database located in Microsoft Cloud Azure.

**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 1.1).
- Certificate involved in these encrypted sessions are leveraging SHA 256 secure hash algorithm. This applies to communications between EcoStruxure™ Facility Expert application (web portal and mobile app) and the servers in the Microsoft Azure data centers. And also to communications between our on-premises data loggers ComX and our Schneider Cloud solution.
- 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.

**DATA LOGGERS**
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 special, uppercase, lowercase and numeric character, and no more than two identical characters in a row.

Account management & Authorization
Account Owners have granular control (Partner level, Customer level, Site level) on the level of access rights and on the scope of data they can to grant to other users in the EcoStruxure™ Facility Expert. At any time, Admin users can add, modify and remove users from their account as well as immediately revoke any access by any user at their discretion.

**SECURITY ON YOUR 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
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.

### List of files format supported by the application

#### EcoStruxure™ Facility Expert

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<tr>
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<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**

<table>
<thead>
<tr>
<th>USER PROFILE</th>
<th>MANAGER</th>
<th>TECHNICIAN</th>
<th>COLLABORATOR</th>
<th>CLIENT MANAGER</th>
<th>CLIENT VIEWER</th>
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<tbody>
<tr>
<td><strong>USER MANAGEMENT</strong></td>
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<tr>
<td>Add/remove a Manager</td>
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<tr>
<td>Add/remove an 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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<td><strong>COMMISSIONING &amp; SETTINGS on webportal</strong></td>
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<td>Create a customer</td>
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<td>Update customer information</td>
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<td>Create site</td>
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<tr>
<td>Update site information</td>
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<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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<td><strong>OPERATIONS FEATURES on mobile App</strong></td>
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<tr>
<td>Create / modify / delete asset</td>
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<td>Add attachments to an asset</td>
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<td>Duplicate asset</td>
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<tr>
<td>Be notified and access to alarm / alert in case of issue</td>
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<tr>
<td>Acknowledge and close alarm / alert</td>
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<tr>
<td>Access to detailed asset dashboard</td>
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<tr>
<td>Scan QR code to access asset detail</td>
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<tr>
<td>Create log</td>
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<tr>
<td>Add a comment to a log</td>
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<td>Delete log</td>
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<tr>
<td>Raise an issue / a ticket</td>
<td>●</td>
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<tr>
<td>Create / assign a task</td>
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<tr>
<td>Complete a task</td>
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<tr>
<td>Collect readings manually</td>
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<tr>
<td>Customize reports</td>
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<tr>
<td>Generate intervention report</td>
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<tr>
<td>Generate activity report</td>
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<tr>
<td>Request asset access by scanning QR code</td>
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<tr>
<td>Access to export data function (on demand)</td>
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