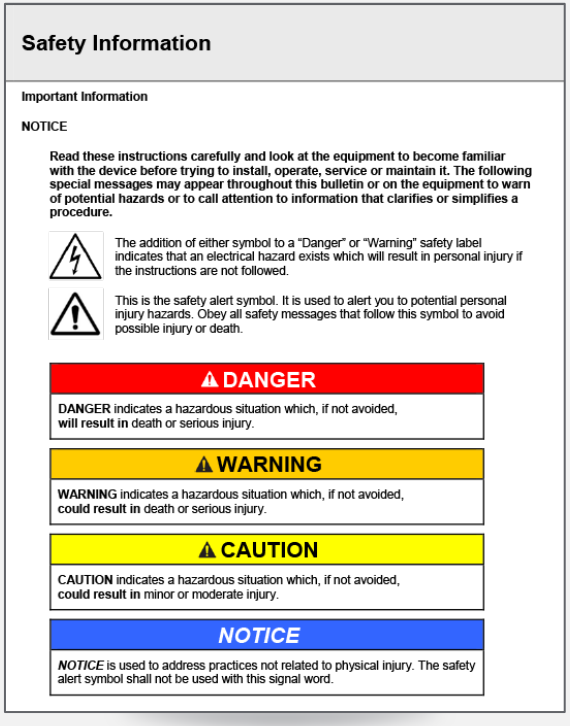
EcoStruxure™ Facility Expert

Life Is On Schneider Electric

Legal & safety information



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.

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.

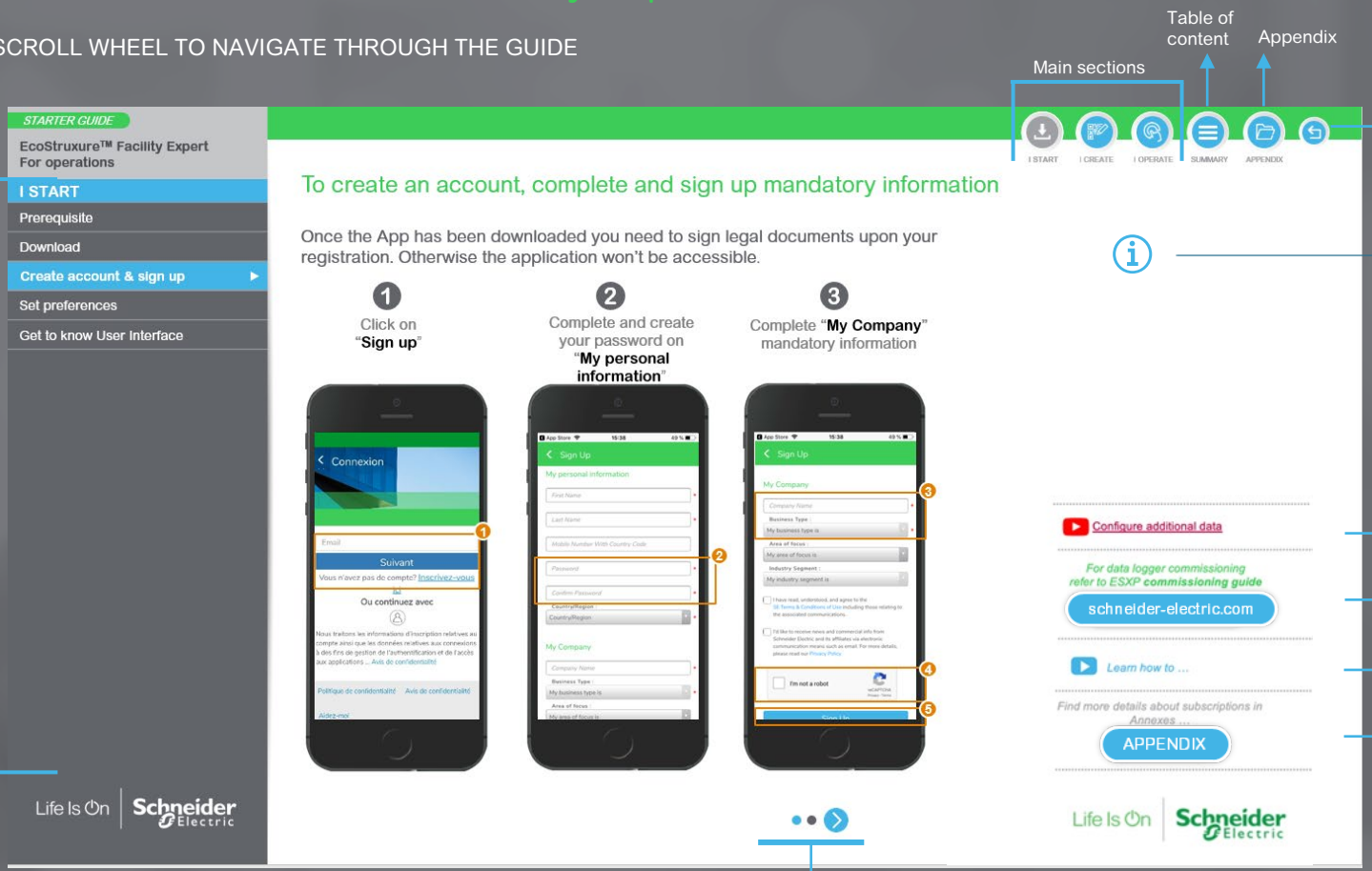
When devices are used for applications with technical safety requirements, the relevant instructions must be followed.

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.

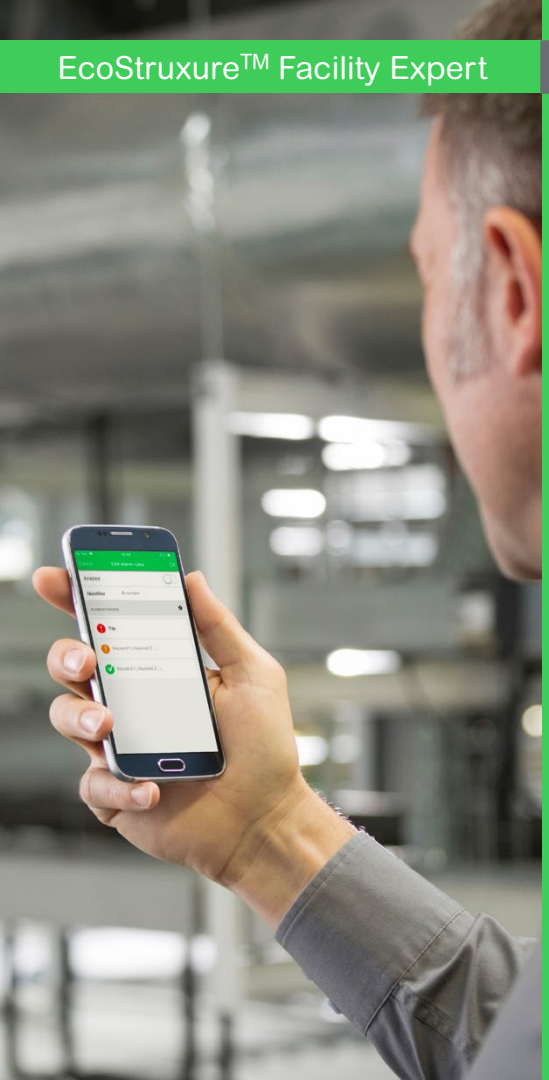
Life Is On Schneider Electric

How to use the EcoStruxure™ Facility Expert Starter Guide interface

USE THE SCROLL WHEEL TO NAVIGATE THROUGH THE GUIDE



EcoStruxure™ Facility Expert

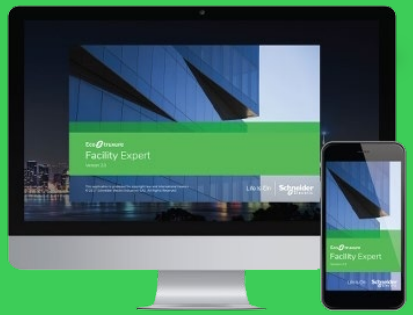


INTRODUCTION

Learn more about EcoStruxure™ Facility Expert:

schneider-electric.com

Discover EcoStruxure™ Facility Expert



On-line training:

Schneider-electric.com

DRIVING BUILDING EXCELLENCE

LEARN MORE

EcoStruxure™ Facility Expert - PRESENTATION

LEARN MORE

MAIN FEATURES FOR ASSETS MANAGEMENT

LEARN MORE

SERVICE ENABLEMENT

LEARN MORE

SECURITY AT EVERY LEVEL

Key requirements of EcoStruxure architectures

LEARN MORE

DATA PRIVACY

Protection of data flows

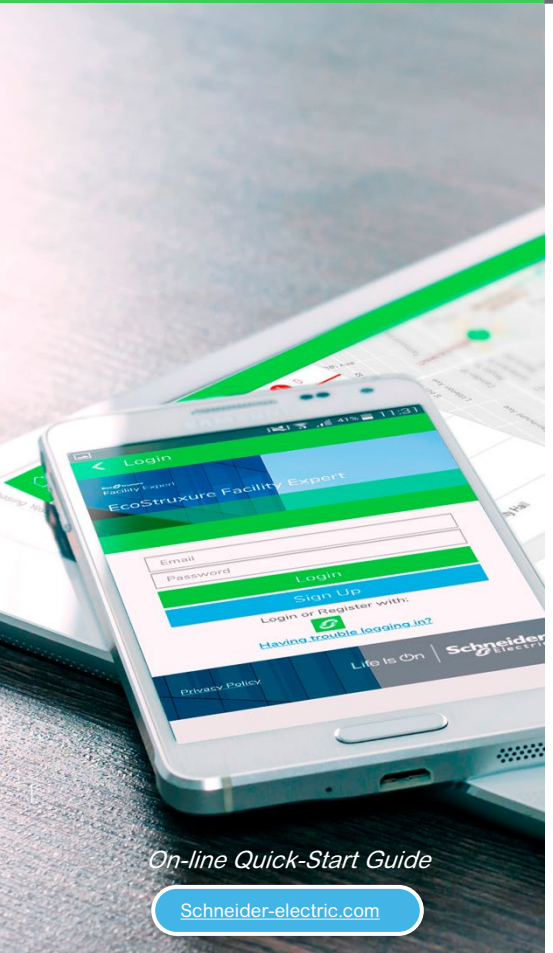
LEARN MORE

STARTER GUIDE OBJECTIVE & SCHNEIDER ELECTRIC CONTACT

LEARN MORE

EcoStruxure™ Facility Expert

TABLE OF CONTENTS



On-line Quick-Start Guide

Schneider-electric.com

I START

WITH MY App

I CREATE

MY ASSET LIBRARY

I OPERATE

WITH MY App AND MANAGE MY LIBRARY

I START

Prerequisite

Create account

Get to know user interface

Download

Set preferences

Life Is On Schneider Electric

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 or tablet depends on the operating system.
Refer to compatibility recommendations on App store.

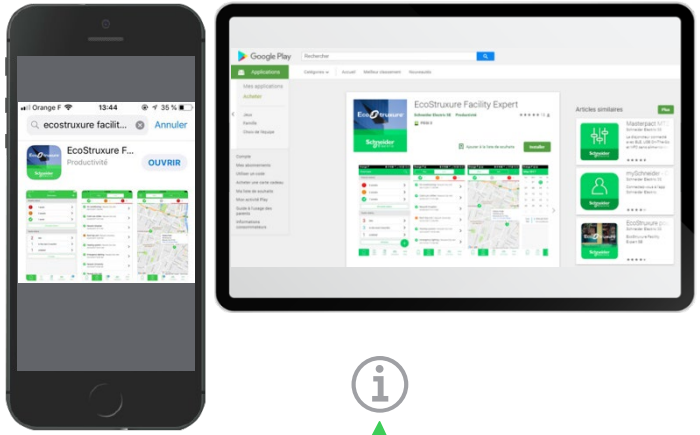
A mobile application which runs in Online or Offline mode
During maintenance operations, technicians may be out of mobile network area, but they can still add information.
As soon as the smart phone detects a mobile network it will automatically update the information.

I START
Prerequisite
Download
Create account & sign up
Set preferences
Get to know User Interface

How to download EcoStruxure™ Facility Expert application from App store

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 tablets. For laptop usage, connect to EcoStruxure™ Facility Expert Web portal

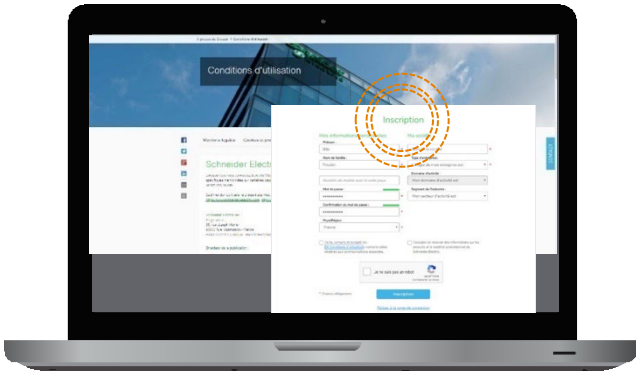
SCAN QR CODE FOR iOS OR ANDROID DEVICES

I START
Prerequisite
Download
Create account & sign up
Set preferences
Get to know User Interface

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.

▶ *EcoStruxure™ Facility Expert web access*



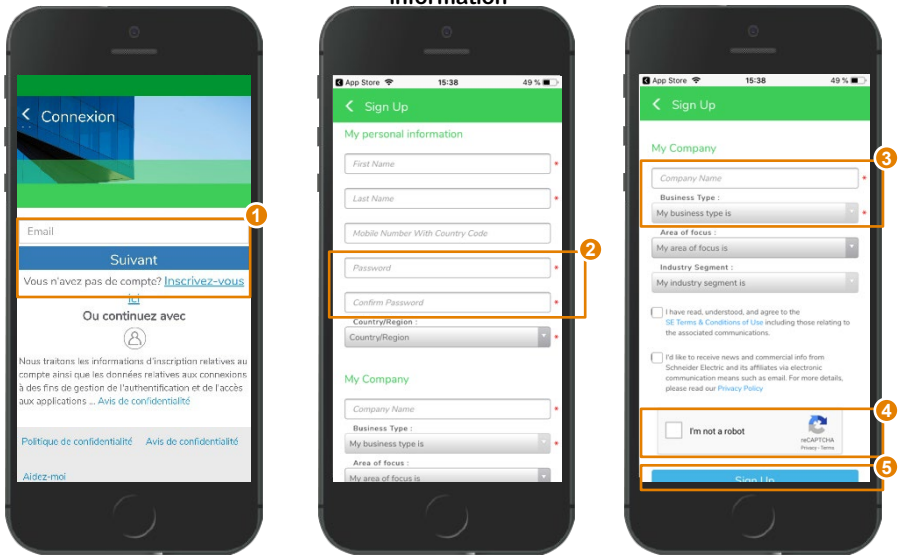
I START
Prerequisite
Download
Create account & sign up
Set preferences
Get to know User Interface

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.

Schneider Electric is committed to:
- Respect GDPR
- Protect user's private data
- Restitute user data upon user request

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



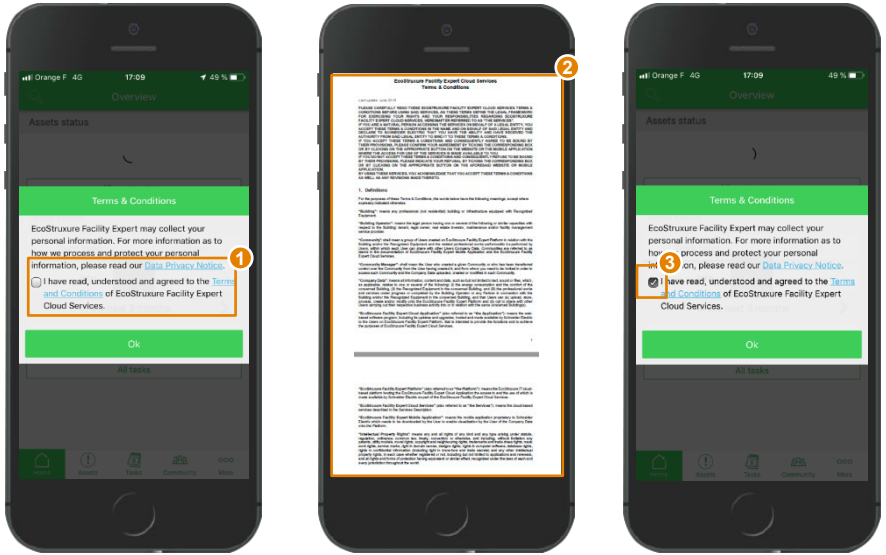
4. Check CAPTCHA box
5. Confirm by clicking on "**Sign Up**"

Then, you will receive an email to activate your account.

Access Privacy policy and agree to the terms and conditions

Note: You can access the legal documents anytime in settings menu

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



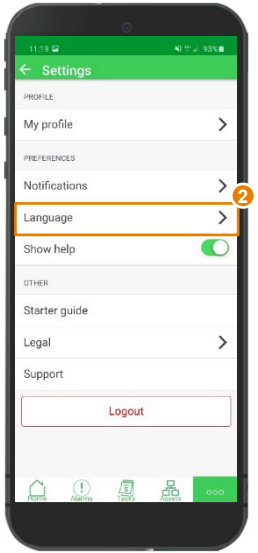
I START
Prerequisite
Download
Create account & sign up
Set preferences
Get to know User Interface

Preferences and settings

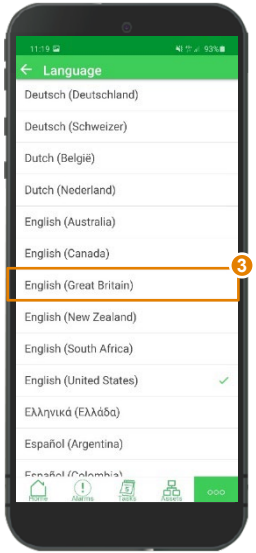
This entry enables you to access your legal documents, complete your personal profile or to configure your App.

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

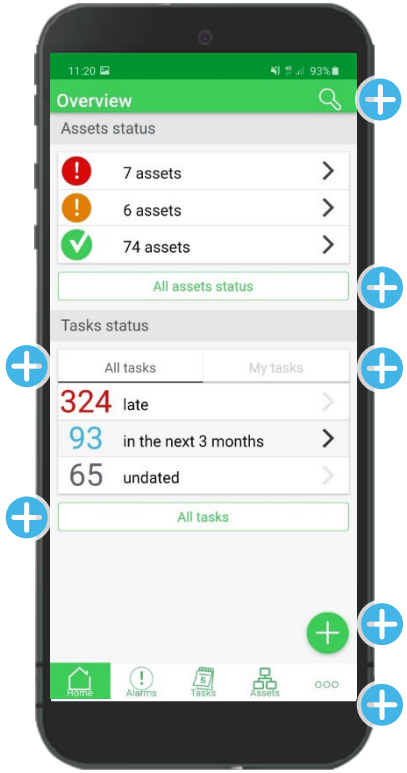
Life Is On Schneider Electric

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

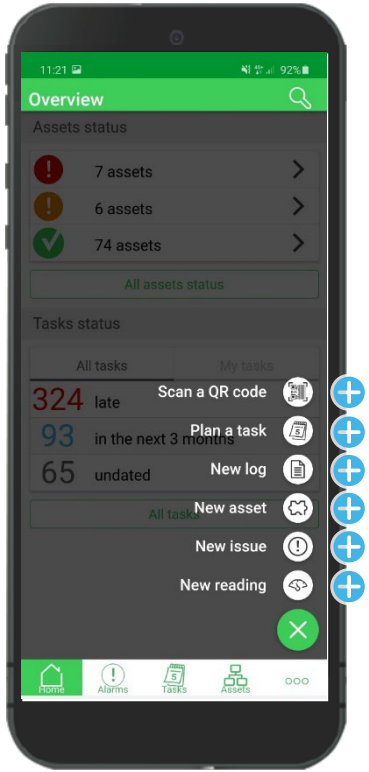


Discover the App

Quick Access - User Interface

Click on "+" on the overview UI to view **Quick access** dashboard for faster access to the main features of your App.

Discover main keys:



Note: order of **main keys differ** on iOS and Android

Discover the App

I START
Prerequisite
Download
Create account & sign up
Set preferences
Get to know User Interface
Overview
Quick Access
Task Manager
Asset Detail
Map View

Task Manager - User Interface

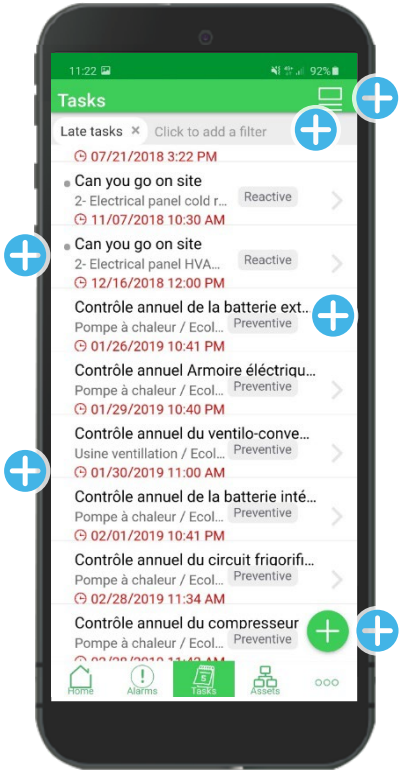
With the Task Manager of your App, you can choose between Calendar or Task list view, easily filter predefined tasks, identify nature, assignment status of each task and quickly find one to access its details.

Discover your Task manager:

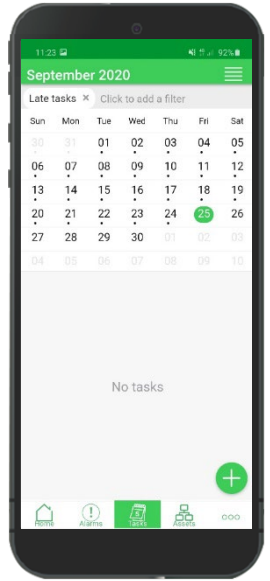
Filter list:
- Assigned to you
- Not assigned
- Unread
- Undated tasks
- Next 3 months tasks
- Late tasks
- Preventive tasks
- Reactive tasks
- Inspection

Note: you can activate several tags at the same time if needed

Task list view



Calendar view

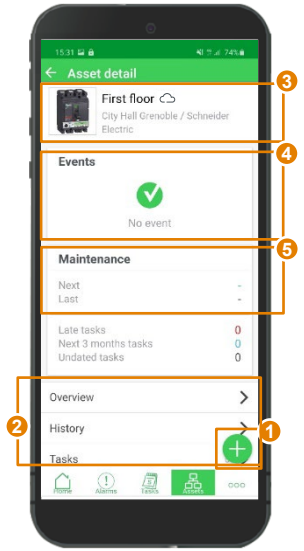


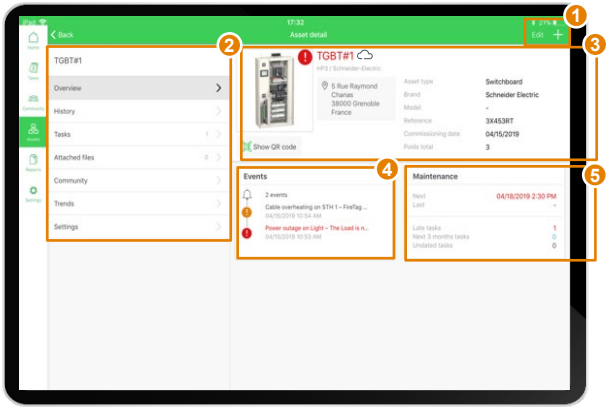
Discover the App

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

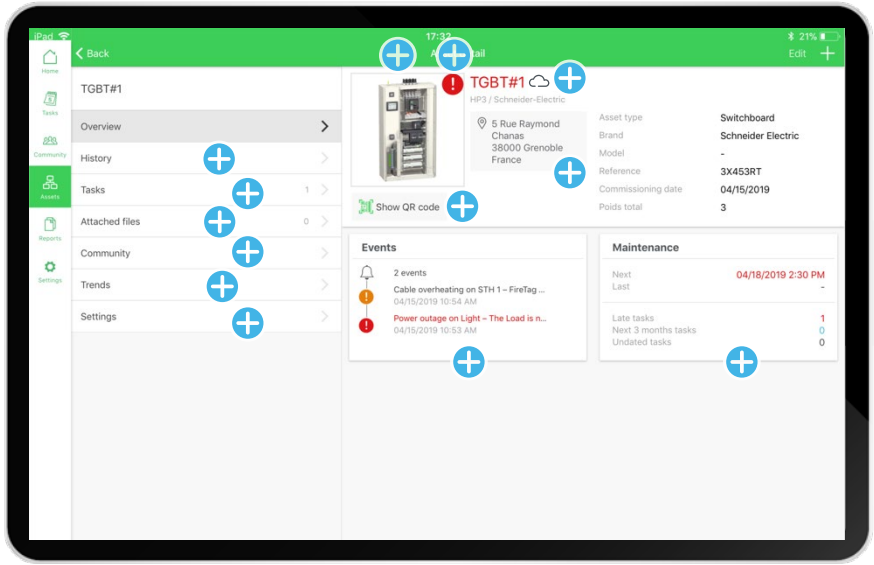




Discover the App

Asset Detail - User Interface

Discover Asset dashboard:



Discover the App

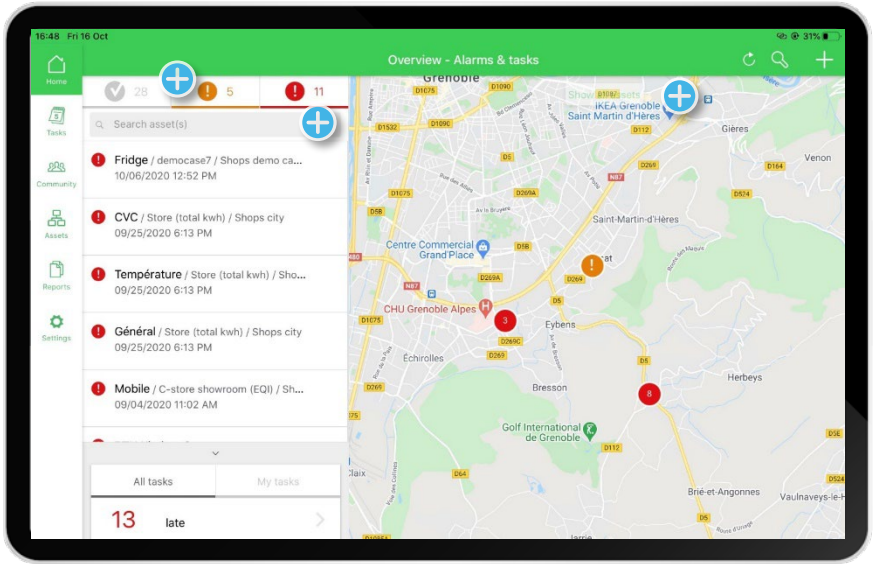
Map View - User Interface

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

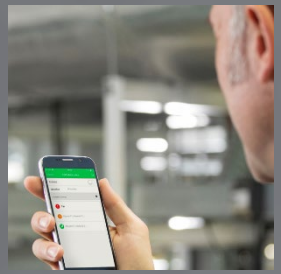
Blue line appears on the left of User Interface to help you quickly identify unread notifications received for all main menus: asset status, tasks or community



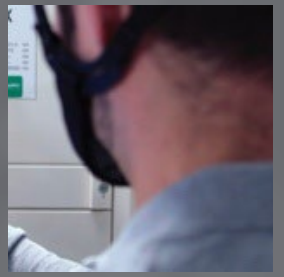
Discover the App

I CREATE

I register a new asset manually



I download an asset from Schneider Electric resources repository



Facility Expert

I save time when creating maintenance tasks

I activate services

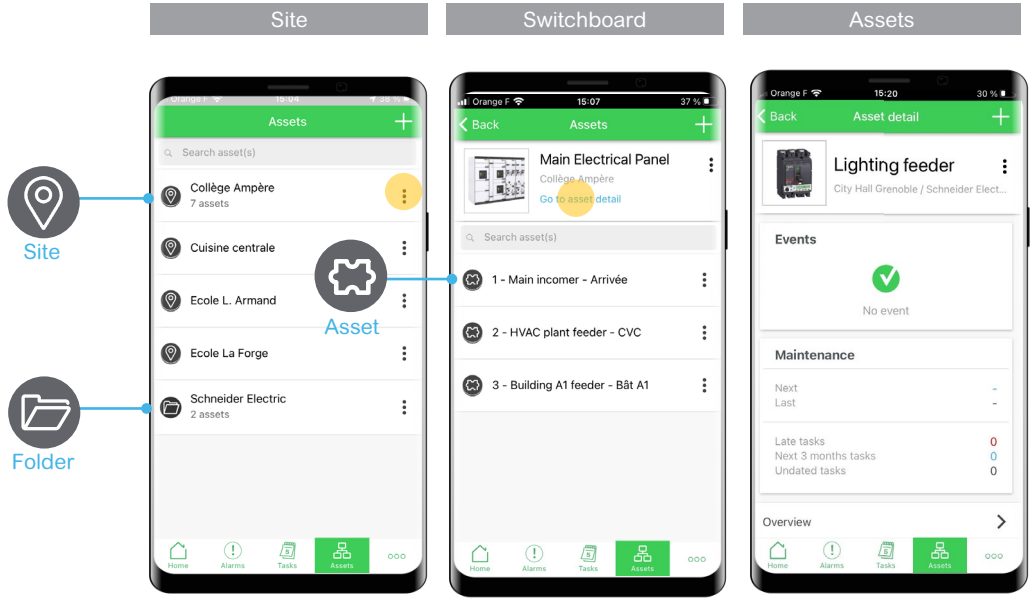
Life Is On Schneider Electric

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 folder's 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 creating maintenance tasks for similar equipment you can simply **duplicate an asset** with 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.

Organize assets by sites or customers

Learn how you can "Duplicate an asset"
Learn how to "Transfer asset ownership"

Structure your asset library

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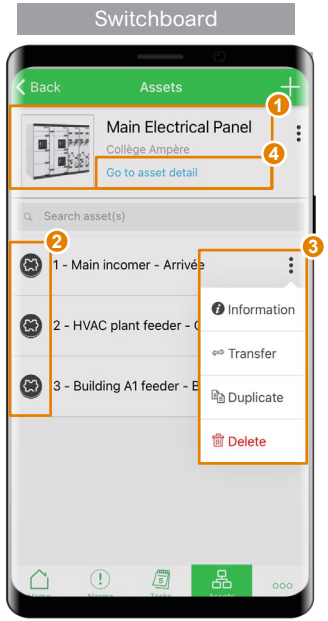
Tasks, periodicity and actions list will be kept, but not the contributor assignment or other attached documents (pictures, description etc…) as they are contextual information and asset specific.

1 Access to the parent information

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

3 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



4 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"

I CREATE

I register a new asset manually

Create a new 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

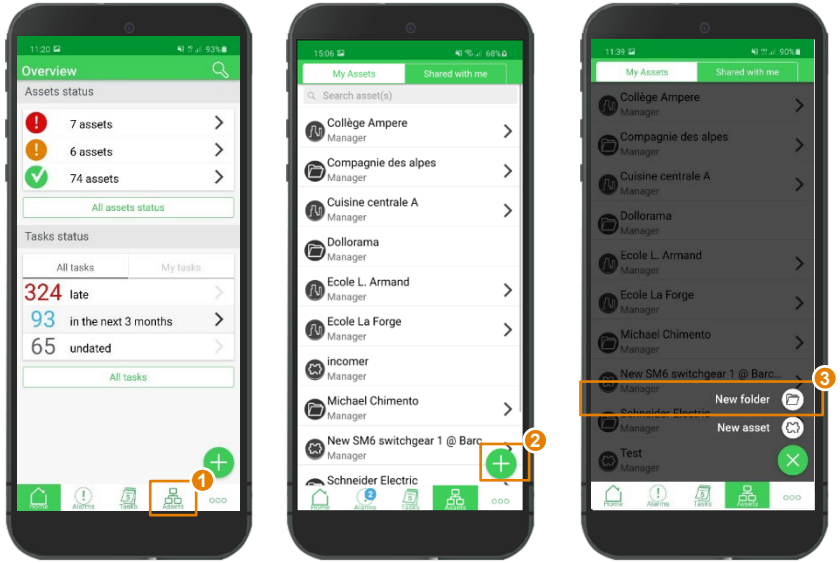
I download an asset from SE resources repository

I activate services

Create a new 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

I CREATE

I register a new asset manually

Create a new folder

Create a new asset
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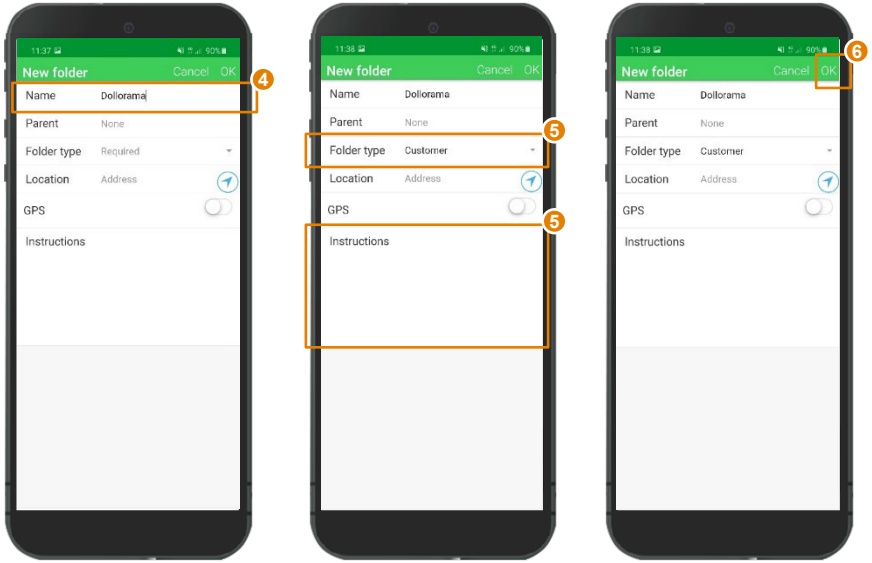
Create a new folder (cont.)

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



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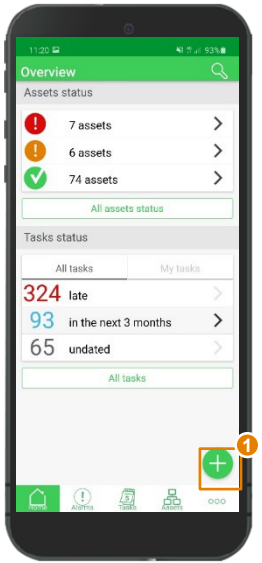
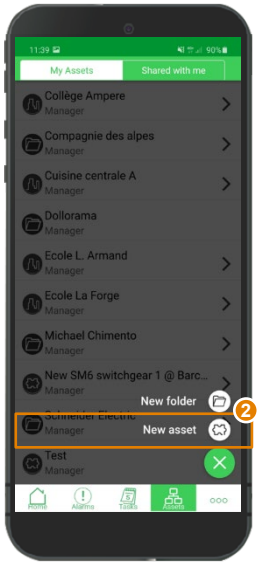
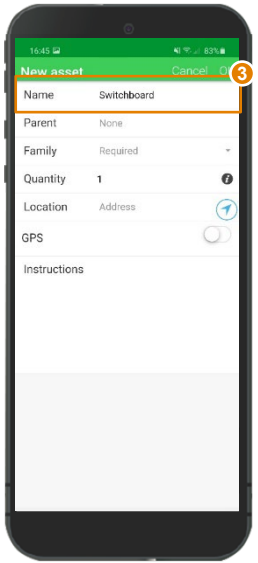
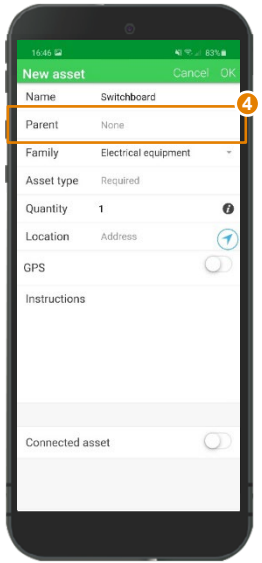
Create a new asset manually

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









Create a new asset manually (cont.)

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.

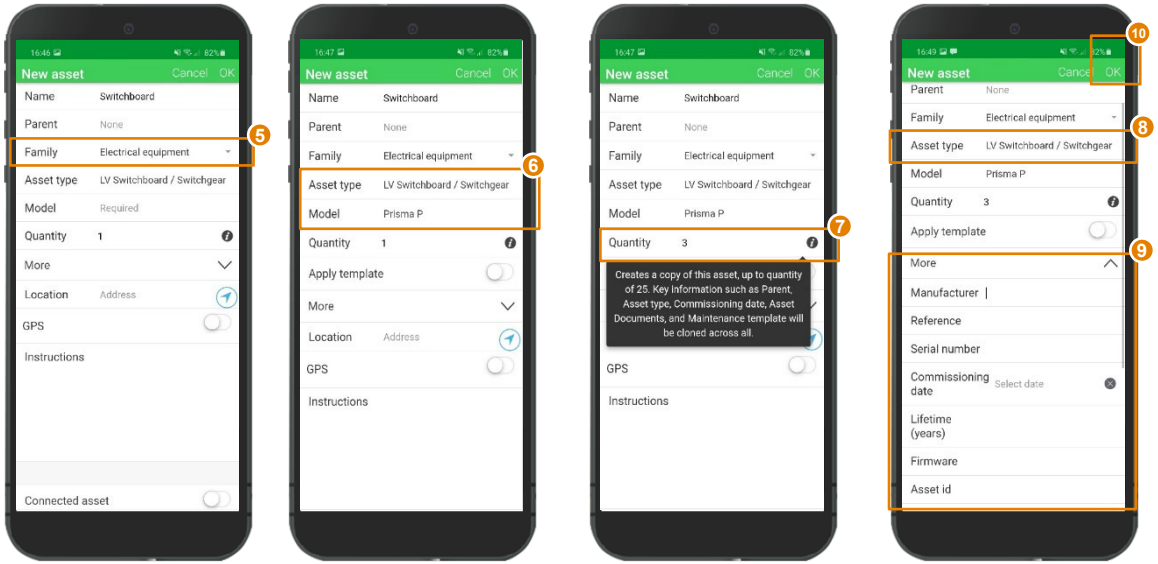
When entering a valid Schneider Electric product reference, all documentation and product picture are automatically accessible.

5 Select a "**Family**"

6 Create or select an asset "**Type**"/ "**Model**"

7 Enter "**Quantity**" for quicker duplication

8 Add another asset information **(brand/serial number, ref…)**



9 Add any useful information (can be textual information, such as equipment password or note)

10 Save by clicking on "**OK**"

You can modify "instruction" field by editing it through the "Overview" menu of your asset, any time.

Organize assets by sites or customers

I CREATE

I register a new asset manually

Create a folder
Create a new asset
Locate a new asset
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I save time when creating maintenance tasks

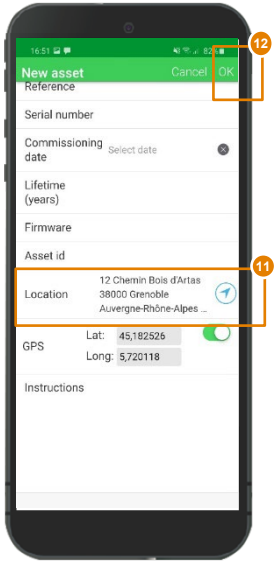
I download an asset from SE resources repository

I activate services

Locate the new asset

11

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

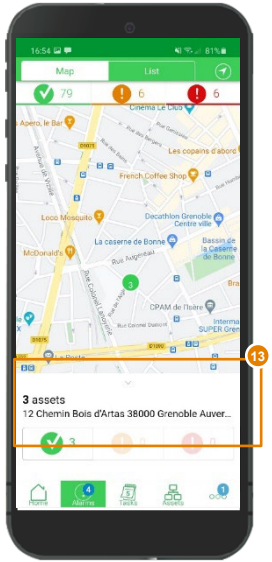


12

Save by clicking on “**OK**”

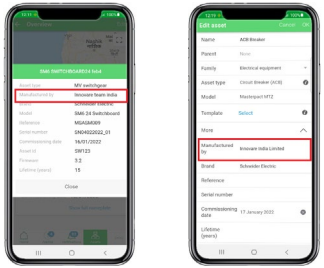
13

Verify on the “**Map**” or on your “**Assets List**” that your new asset is now stored in your library.



You can see “Manufactured By” in Asset nameplate in following places:

- Device characteristics display
- Also available in the "Edit" section to view



Enter a new asset

I CREATE

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

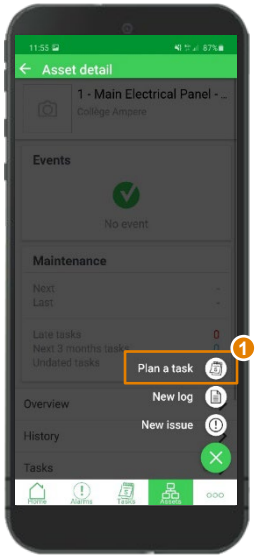
I activate services

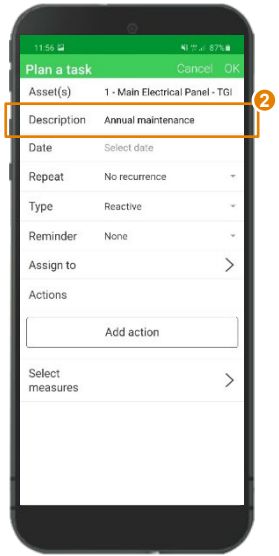
Set up maintenance plan

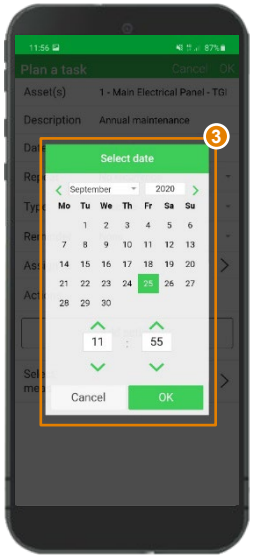
Setting up your asset maintenance plan helps you insure the preventative maintenance will be performed on time thanks to reminders and the defined list of actions.

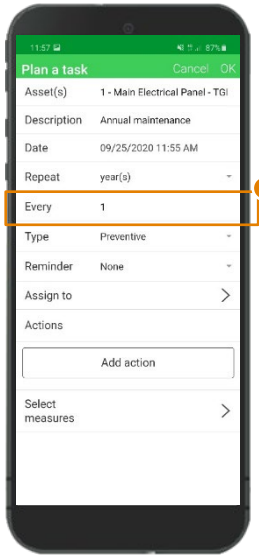
ON ASSET DETAIL VIEW:

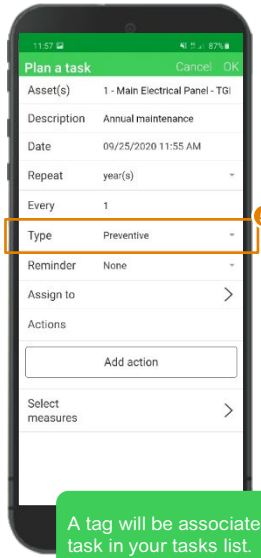
1. Click “**Plan a task**”
2. Enter “**Description**”
3. Select first occurrence
4. Schedule the recurrence with “**Repeat**” entry
5. Click on “**Type**” and select the category of this task











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”.

I CREATE

I register a new asset manually

- Create a folder
- Create a new asset
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- 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

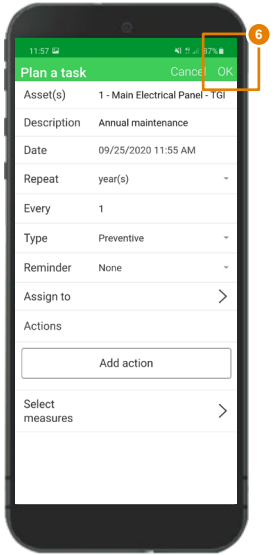
I download an asset from SE resources repository

I activate services

Set up maintenance plan (cont..)

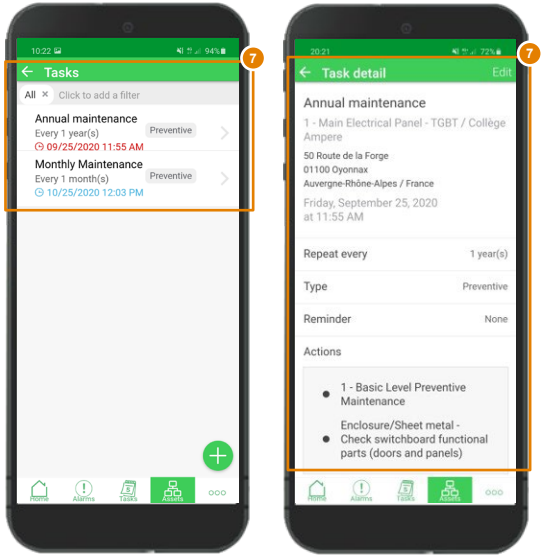
6

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.

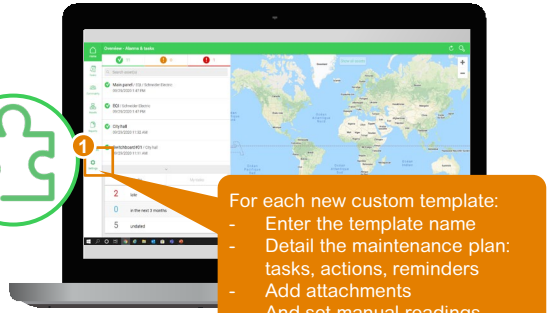
Set up a maintenance plan

Learn how you can "Assign a task" after receiving an alarm

Customize maintenance template for 3rd party assets

1

Access the new "**template**" tab from Facility Expert web application

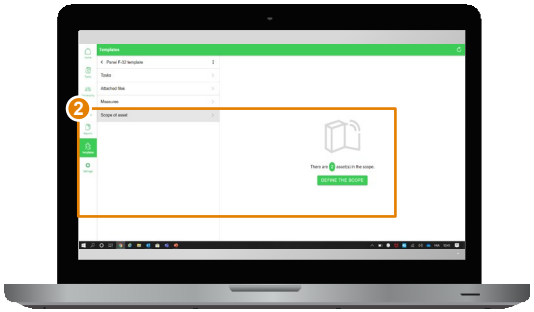


For each new custom template:
- Enter the template name
- Detail the maintenance plan: tasks, actions, reminders
- Add attachments
- And set manual readings

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

2

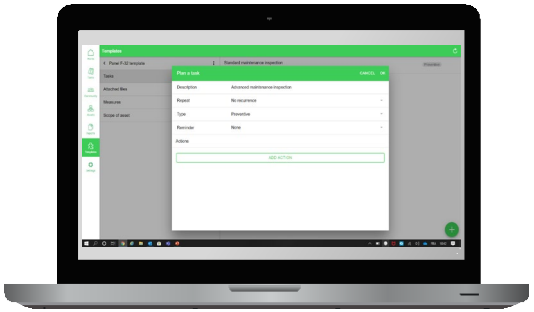
Select the **scope** of your existing assets to apply this template



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

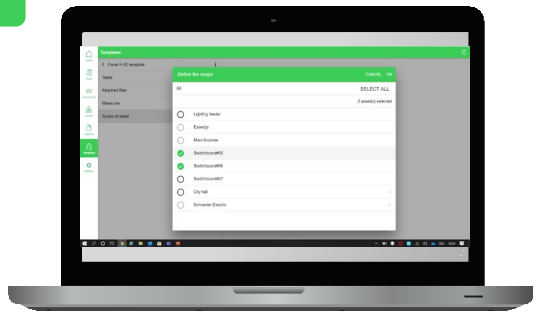
3

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



4

Or to **modify the scope of assets** associated to a template



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I activate services

Set up reminder and detail the task

8

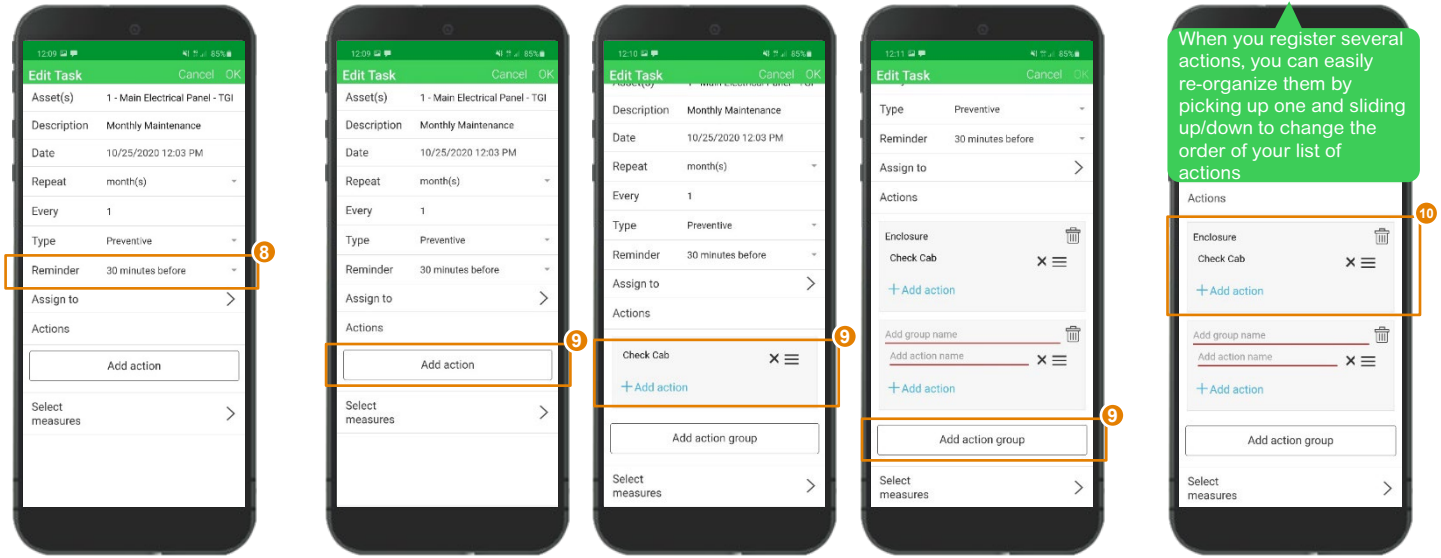
Set up a **Reminder** to upload the task into your calendar, and be notified in advance when the intervention must be performed

9

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

10

Simply modify or delete title, actions names or actions



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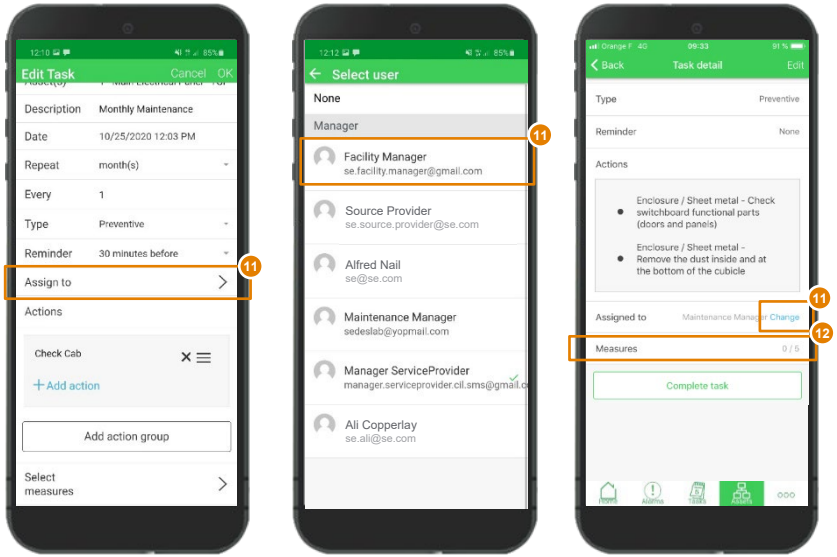
I activate services

Assign the task

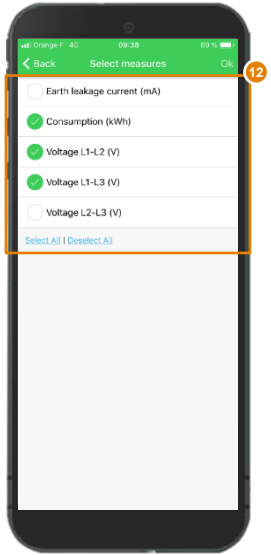
11

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



12

You can also select the "Measures" you want to associate to the task



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I activate services

Create and manage your asset QR code from your mobile App, on smartphone or tablet

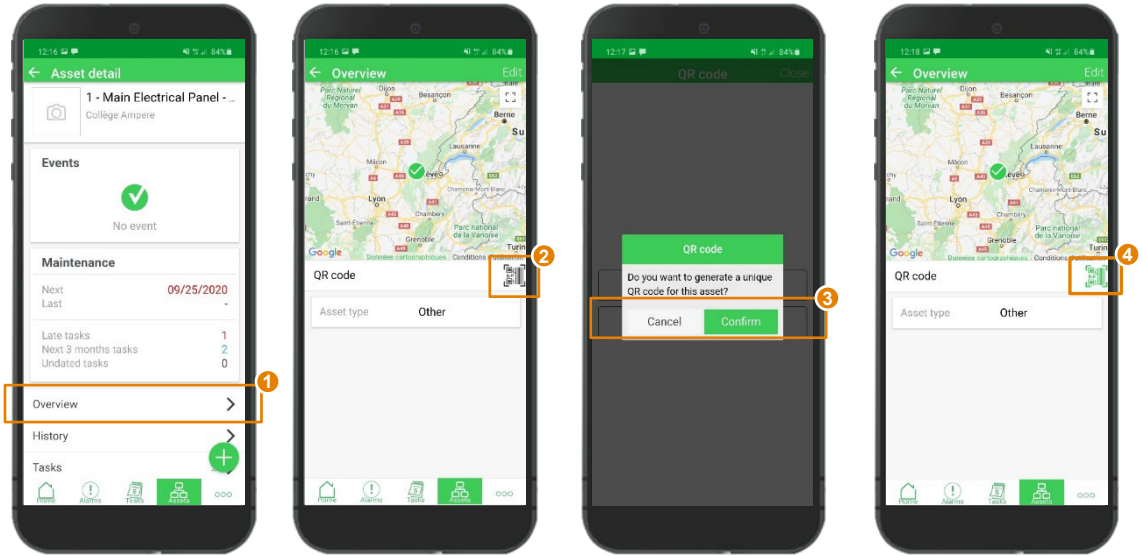
CREATE

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 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

Speed up operations with QR codes

Life Is On Schneider Electric

I CREATE

I register a new asset manually

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Locate a new asset
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I activate services

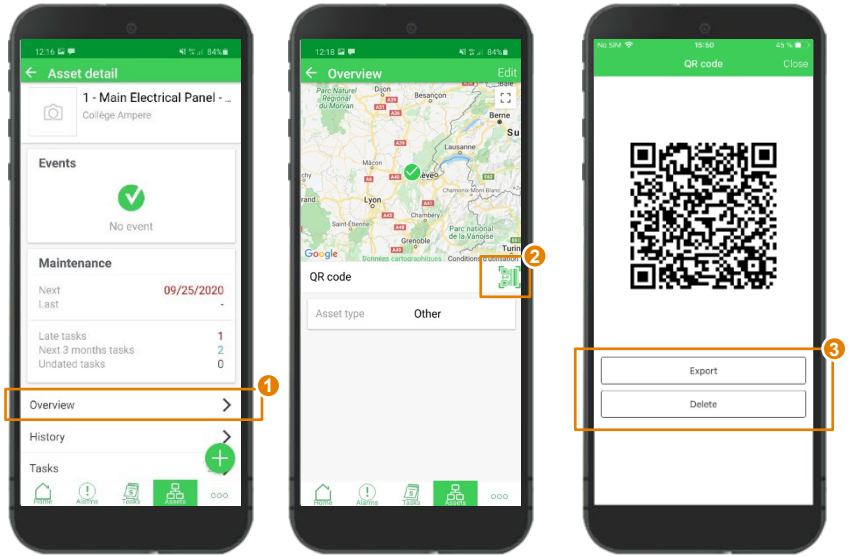
Create and manage your asset QR code from your mobile App, on smartphone or tablet (cont.)

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

1 Select “**Overview**” in “**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

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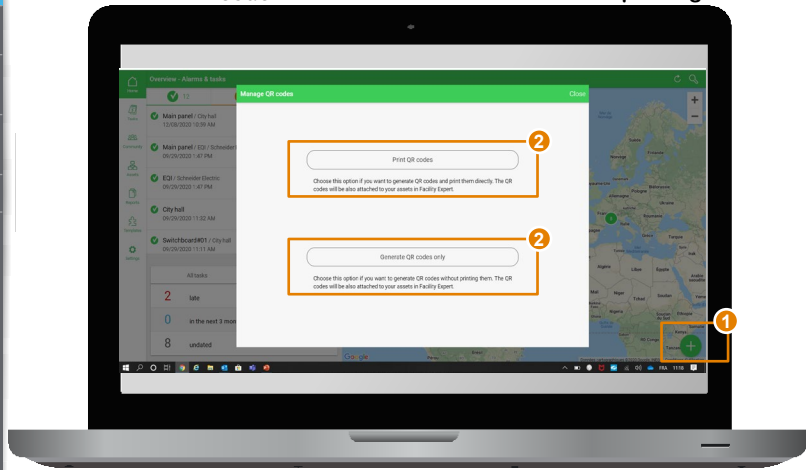
Create QR code from your Web portal

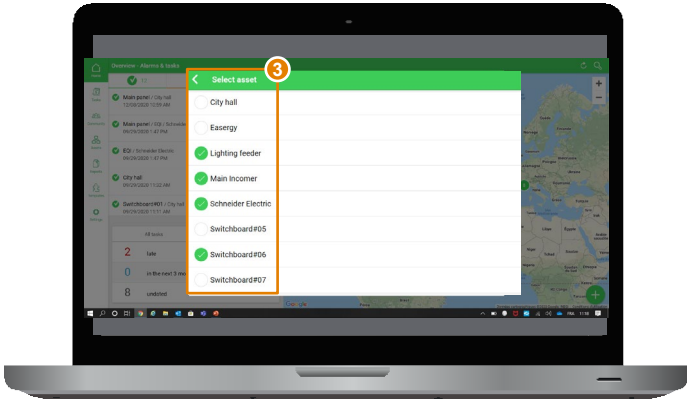
Regarding your Tree structure and the needs of your organization, you can either associate a QR code for a single asset or a group of asset, and then generate and print it simply.

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





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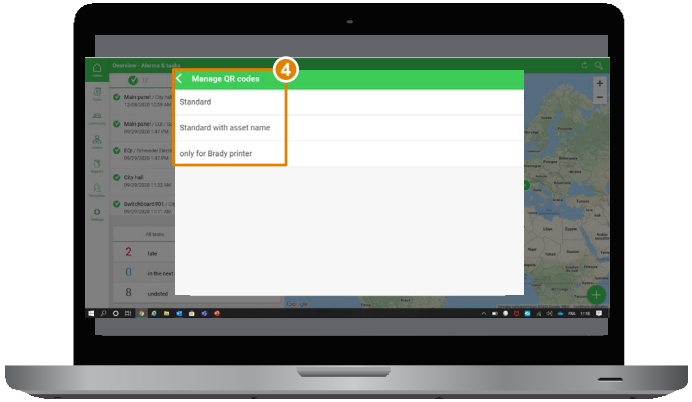
I activate services

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.

Items	Reference
Brady Printer BBP12	Y4185460
Prefabricated sticker with Schneider Electric logo	Y-4850245
Prefabricated sticker without Schneider Electric logo	Y-4850246
Color ribbon	Y961570

I CREATE

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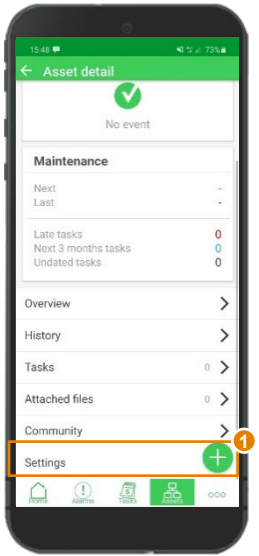
I activate services

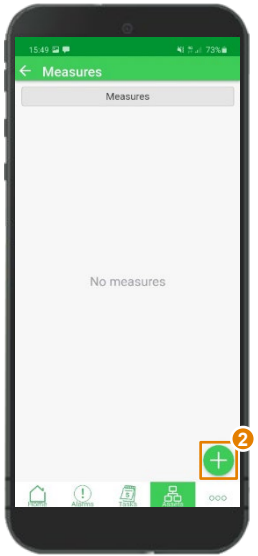
Create manual readings for an asset

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

Configure additional data

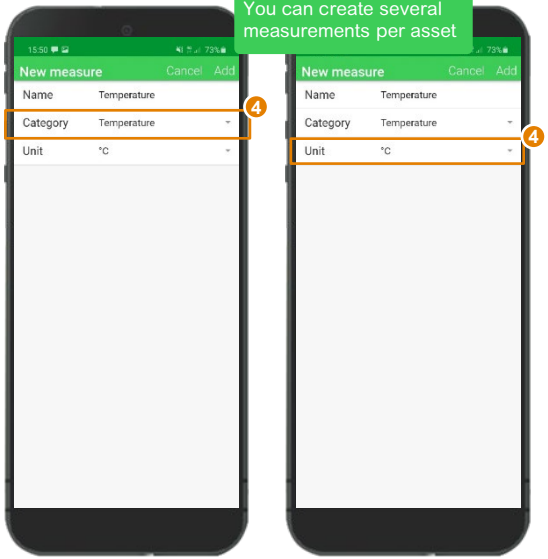
Create manual readings for an asset (cont.)

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.

4

Choose the "**Category**" and units

You can create several measurements per asset



5

Your new measure is now created and attached to an asset

Configure additional data

I CREATE

I register a new asset manually

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- Detail a task
- Assign a task
- Create QR code
- Create manual readings
- Attach a file

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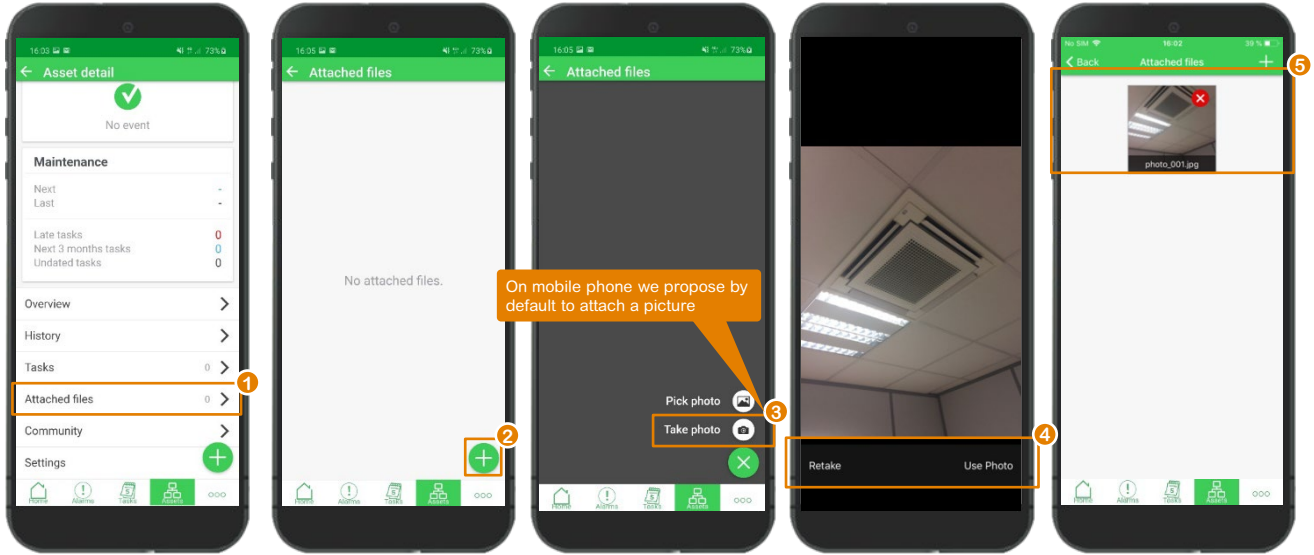
I download an asset from SE resources repository

I activate services

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. 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



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.

Consult the list of supported files

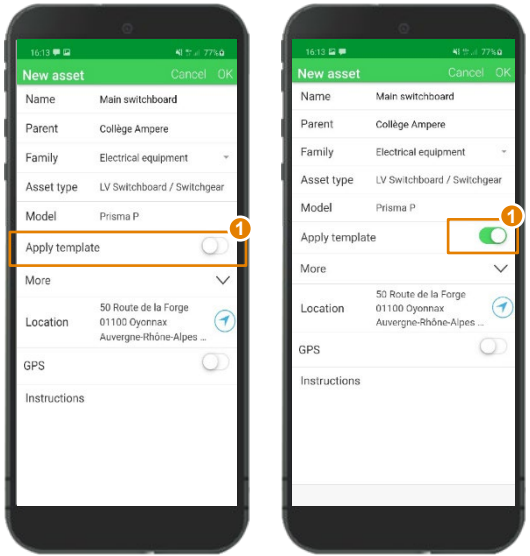
APPENDIX

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.

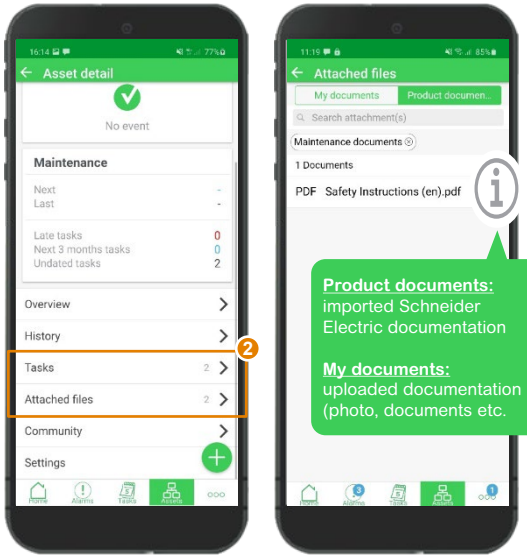
1

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.

Download a Schneider Electric maintenance plan

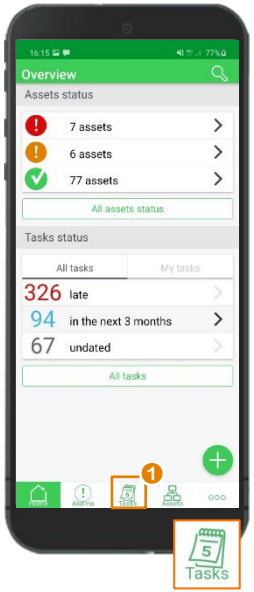
Consult pre-defined list of available models for Schneider Electric MV/LV products

APPENDIX

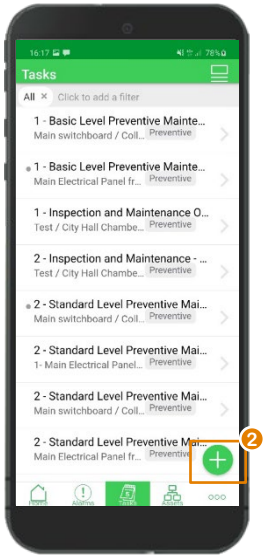
Create a tasks for several assets

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

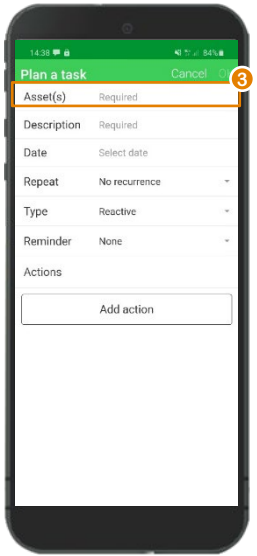
1 On “**Overview**” Click on “**Task**”



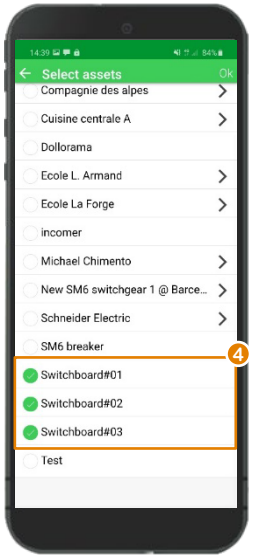
2 On your task list click “**+**”



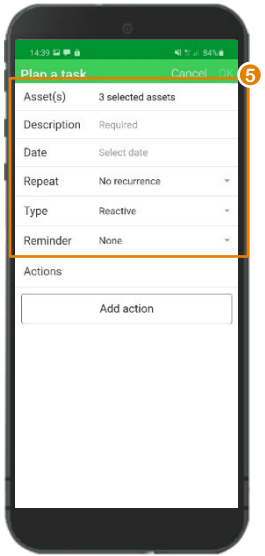
3 Then click “**Asset(s)**”



4 Select equipment on which you want to apply the task and click “**OK**”



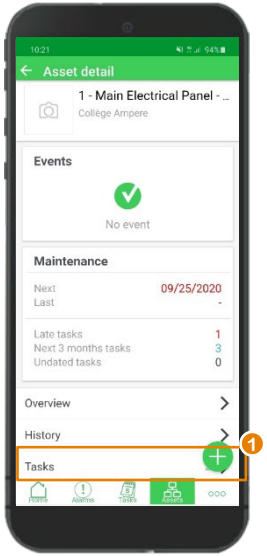
5 The new task will apply to each selected asset



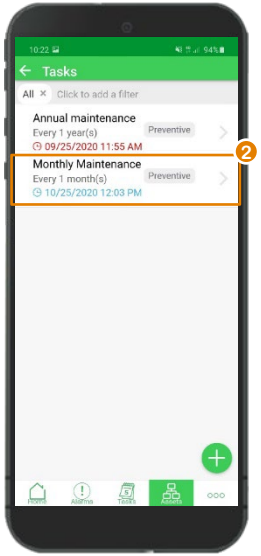
Duplicate tasks for an equipment

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

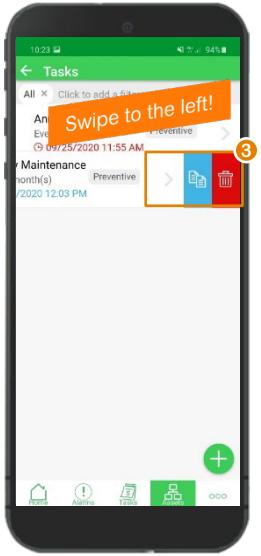
1 On "**Asset detail**" select "**Tasks**"



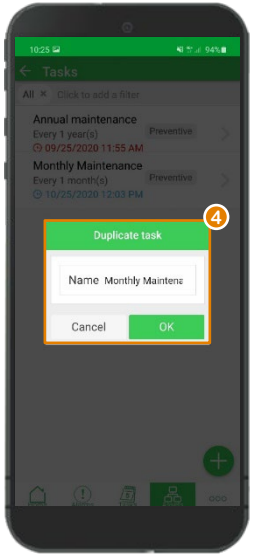
2 Select the task you want to duplicate



3 Swipe to the left to duplicate it



4 Confirm duplication



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.

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.

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

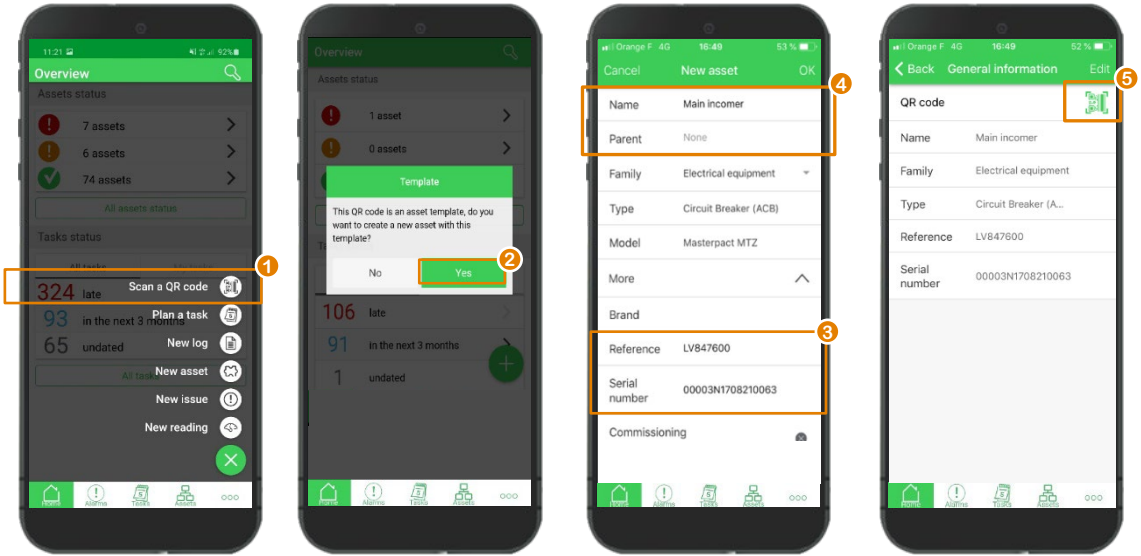
- **Asset nameplate with picture, reference, serial number and brand**
- **Technical documentation:** user and maintenance guides, single line diagram or drawings
- **Maintenance plan**

Consult the list of pre-defined models available for Schneider Electric MV/LV products

APPENDIX

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



Consult the list of pre-defined models available for Schneider Electric MV/LV products

APPENDIX

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

Learn more about EcoStruxure Power Commission

schneider-electric.com

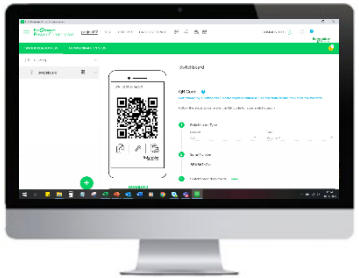
How it works

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.

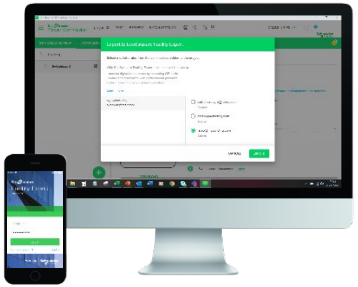
QR code is the unique identifier of the switchboard, for immediate collaboration and access to upload historical information of the equipment.



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.

Learn more about the Digital Logbook solution

schneider-electric.com

How it works (cont.)

3

With **EcoStruxure Facility Expert**, retrieve 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

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

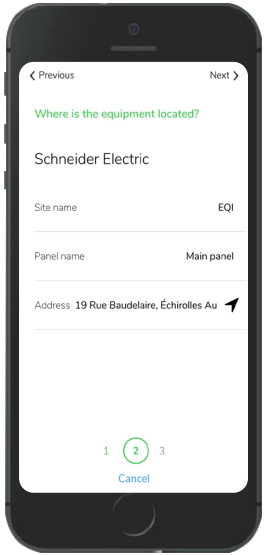
I activate services

Retrieve the asset or switchboard information by scanning a panel QR code with EcoStruxure™ Facility Expert

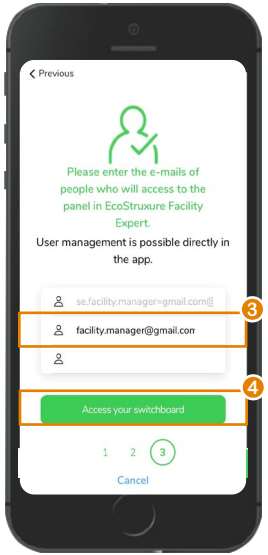
If your are the first to scan the QR code with your app, you can add this new switchboard to your library by following the step-by-step wizard.

1 Click on "**Start creation**"

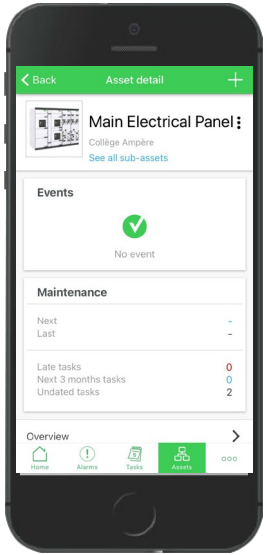
2 Customer name and site information are automatically implemented



3 If necessary, you can add users, allowing 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.

Speed up operations with QR codes

Learn how to "Transfer ownership"

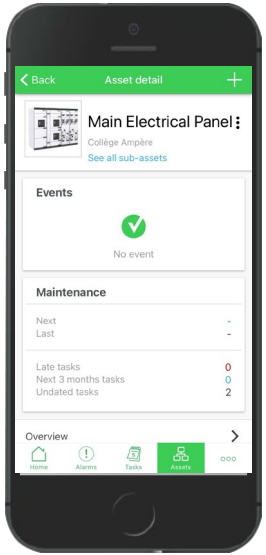
Retrieve the asset or switchboard information by scanning a panel QR code with EcoStruxure™ Facility Expert

As a user has 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

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

1 ACCESS REQUEST 2

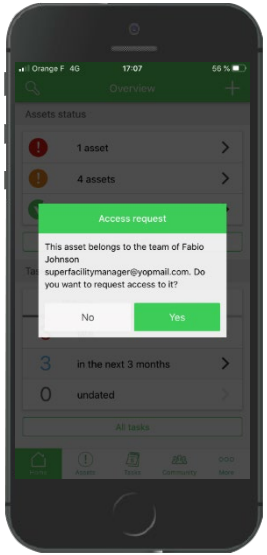
When scanning QR code

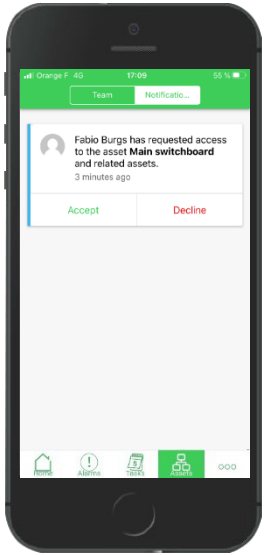
You are instantly notified and can identify the current owner to request an access

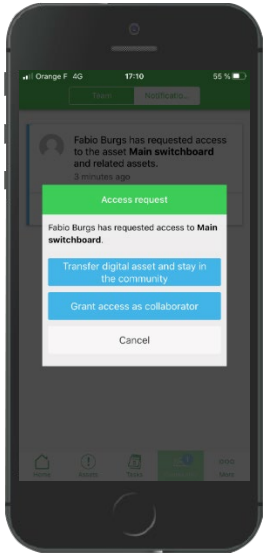
3 ACCESS APPROVAL 4

The owner is notified and can decline or accept the request

The owner can choose to **transfer the digital asset** or to **grant access as collaborator**





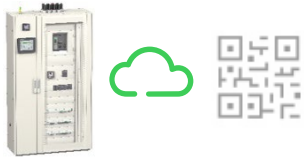


If you **transfer** the digital asset, you still access it as a team collaborator.

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 immediately
- 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 new service offering opportunities.

Learn how you can "Implement alert rules"

Service Activation for PrismaSet Active wireless panel server

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.

24/7

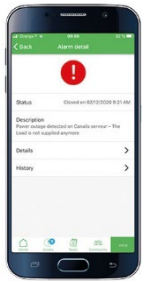
1. Built-in wireless panel server
2. LED indicators: Phase status (on/off)
3. QR Code to activate your free alerts
4. EcoStruxure™ Facility Expert communication status indicator

Service is activated on cloud-based software

Service is not activated (blinking)

PrismaSeT Active wireless panel server

EcoStruxure™ Facility Expert



Alert detail

24/7 notifications on mobile devices

PrismaSeT Active installed into its environment

To learn more about Native Connectivity for Power Availability refer to EcoStruxure Power Application Note

schneider-electric.com

I CREATE

I register a new asset manually

I save time when creating maintenance tasks

I download an asset from SE resources repository

I activate services

Introduction

Activate Services for PrismaSet Active wireless panel server

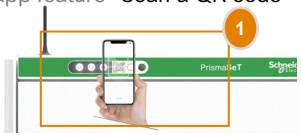
Commission other Schneider Electric gateways

Create email and https alerts

Service Activation for PrismaSet Active wireless panel server

1

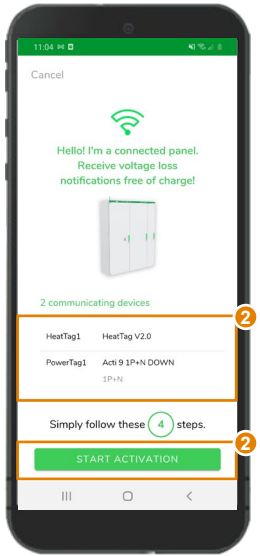
Scan the QR Code located at the top of the panel with your app feature "Scan a QR code"

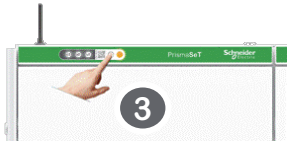


If you don't already have an account, you will be proposed to create one.

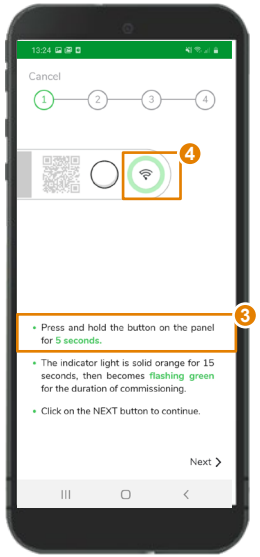
2

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





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.

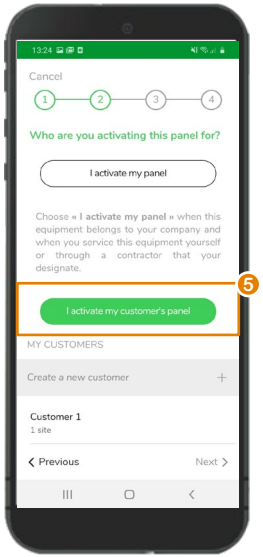
Click on "Next" once this is done.

Service Activation for PrismaSet Active wireless panel server (cont.)

If you activate the panel for your own usage, your next step will be directly step 7

5

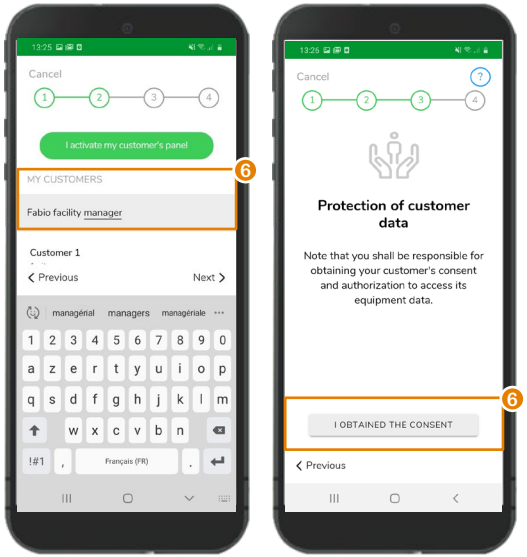
Choose between “I activate my panel” or “Activate the panel for a customer”.



6

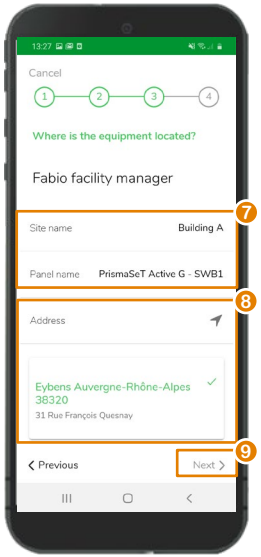
Enter the name of the customer who will own the PrismaSeT Active panel. Click on “Next”.

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



7

Create or select the switchboard site



8

Localize it by entering the address manually or using GPS location

9

Click on “Next” once this is done.

I CREATE

I register a new asset manually

I save time when creating maintenance tasks

I download an asset from SE resources repository

I activate services

Introduction

Activate Services for PrismaSet Active wireless panel server

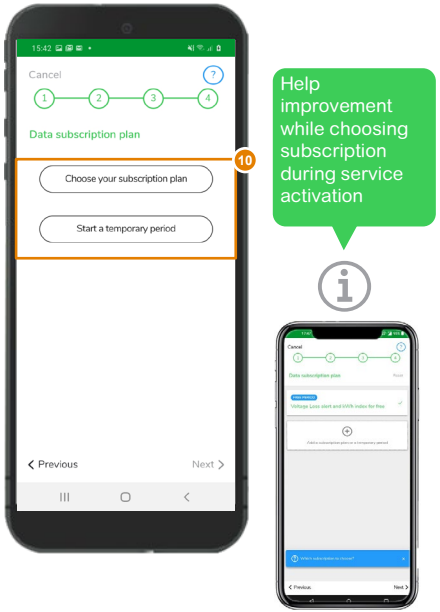
Commission other Schneider Electric gateways

Create email and https alerts

Service Activation for PrismaSet Active wireless panel server (cont.)

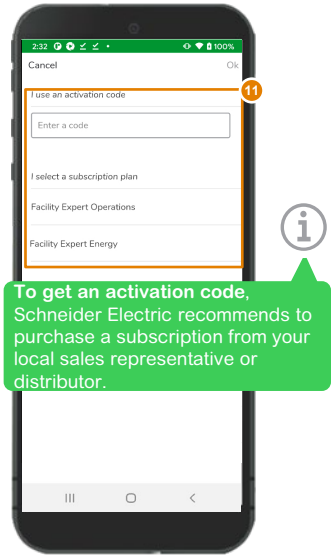
10

If communicating devices are installed, select “Temporary period” or “Subscription plan” regarding your needs



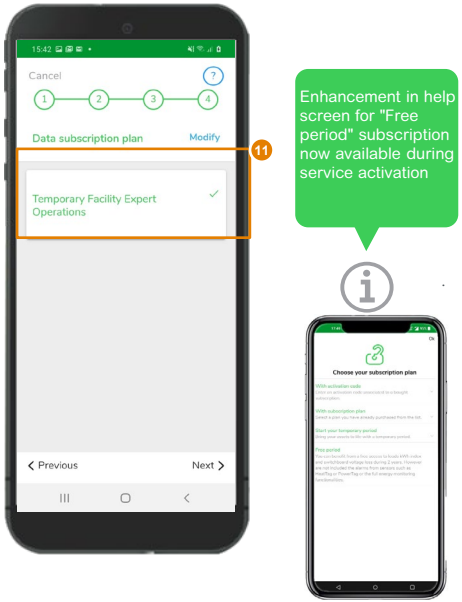
11a

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



11b

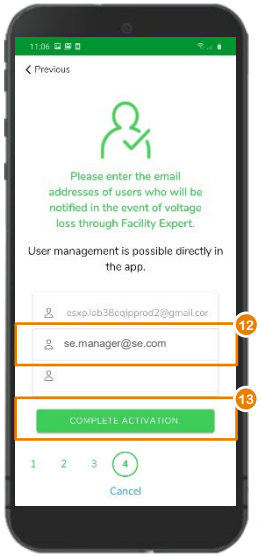
Or Temporary license to finalize the setting before transferring the panel to the operation team.



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.



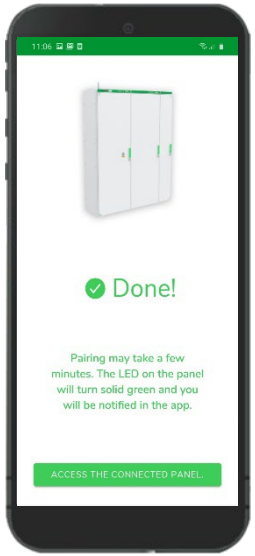
If the users do not have Facility Expert, they will receive an email inviting them to download the app.

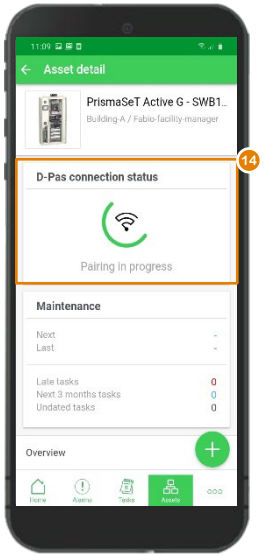
13

Click on "Complete activation"

14

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



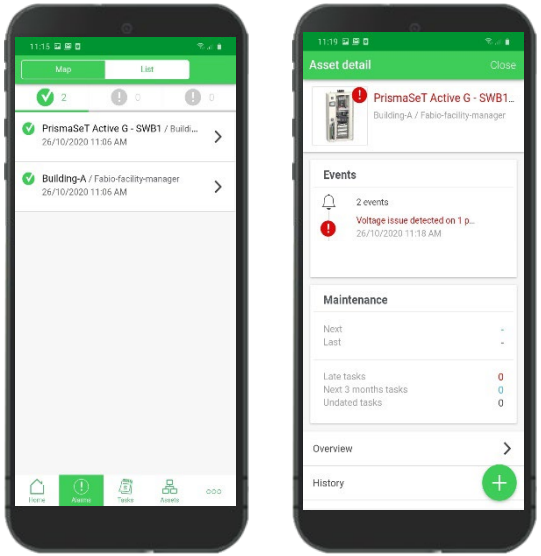


All phases' Led indicators are now active, and the connectivity symbol is green.

Service Activation for PrismaSet Active wireless panel server (cont.)

15

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

I CREATE

I register a new asset manually

I save time when creating maintenance tasks

I download an asset from SE resources repository

I activate services

Introduction

Activate Services for PrismaSet Active wireless panel server

Commission other Schneider Electric gateways

Create email and https 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

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

For data logger commissioning refer to EcoStruxure Power commissioning guide

schneider-electric.com

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

Learn how to "Report an asset-related issue"

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

Find more details about subscriptions:

APPENDIX

I CREATE

I register a new asset manually

I save time when creating maintenance tasks

I download an asset from SE resources repository

I activate services

Introduction

Activate Services for PrismaSet Active wireless panel server

Commission other Schneider Electric gateways ▶

Create email and https alerts

Commission other Schneider Electric gateways: SE8000 room controller

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.

I CREATE

I register a new asset manually

I save time when creating maintenance tasks

I download an asset from SE resources repository

I activate services

Introduction

Activate Services for PrismaSet Active wireless panel server

Commission other Schneider Electric gateways

Create email and https alerts

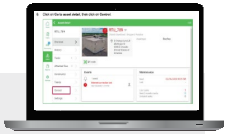
Commission other SE gateways: SE8000 room controller (cont.)

1

Create customer site and register gateway on EcoStruxure Facility Expert Web portal,

2

Connect to SE8000 webpages and setup the room controller



3

Operate and control your equipment remotely with EcoStruxure Facility Expert App

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.

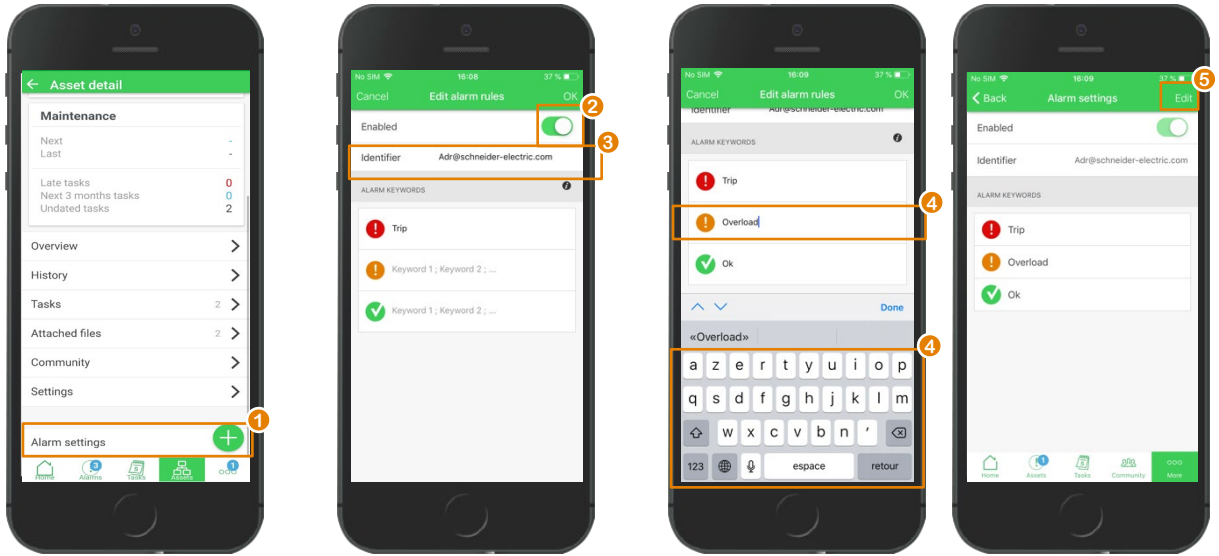
1 Once the toggle button is activated, go on "**Asset detail**" menu and select "**Alarm settings**"

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 by changing the asset status accordingly.
See "Raise a detected issue" chapter

Life Is On Schneider Electric

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

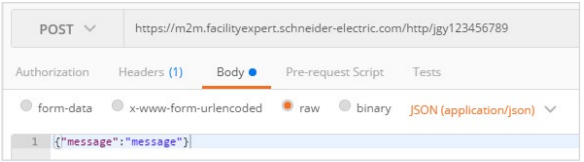
Asset identifier: sender email
(e.g., smartlink32e1@schneider-electric.com)

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

CASE 2 COMMUNICATING VIA https

Asset identifier: alphanumerical characters
(e.g., mac address or serial number)

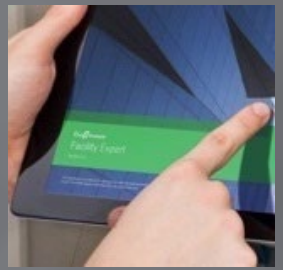
Request must be sent to:
https://m2m.facilityexpert.schneider-electric.com/https/<assetidentifier>
Method: POST
Header: Content-Type: application/json
Body in JSon format: {"message": "message with key word"}



I OPERATE

I share information & collaborate

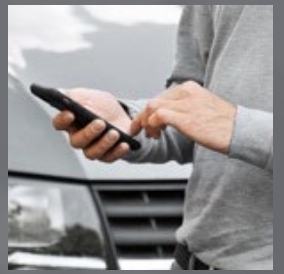
I operate assets & manage tasks



I access history & asset trending

I manage my assets library

I receive alerts from my equipment



I OPERATE MY HVAC EQUIPMENT

Life Is On Schneider Electric

I OPERATE

I share asset information & collaborate

User profiles

Set up & manage users

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

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 daily 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 and 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.

I OPERATE

I share asset information & collaborate

User profiles

Set up & manage users

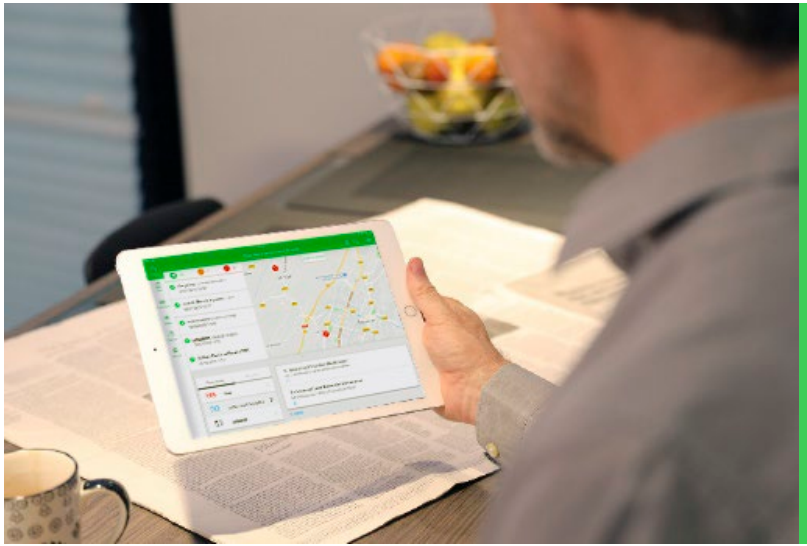
I manage my assets library

I operate assets & manage tasks

I receive alerts from my equipment

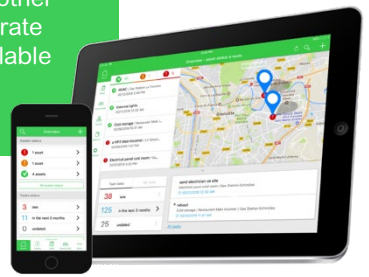
I access history & asset trending

I operate my HVAC equipment



EcoStruxure™ Facility Expert is your dependable partner to strengthen the effectiveness of your team and share information with your customers or contractors.

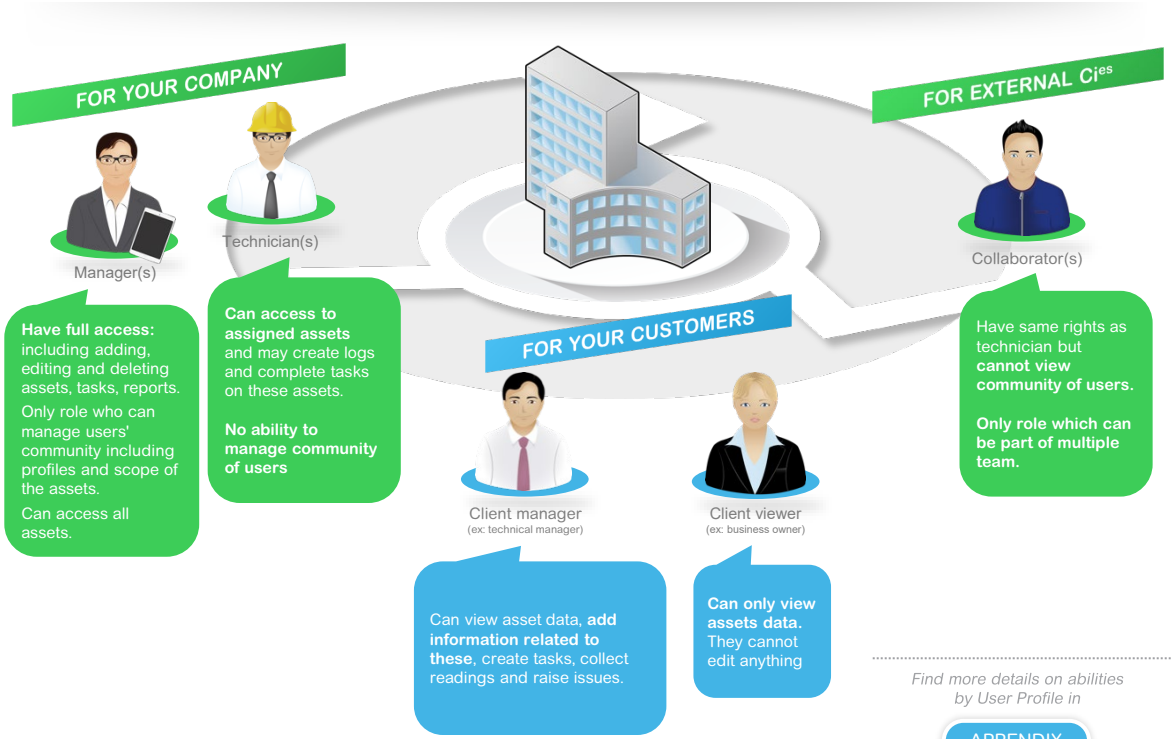
With the help of community features, onsite personnel can count on live support from experts or teammates as necessary, receive notification, share event logs with other contributors and generate operation reports available to viewers.



LIST OF ABILITIES BY USER PROFILES

Set up and manage user profiles through your App or Web portal.

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

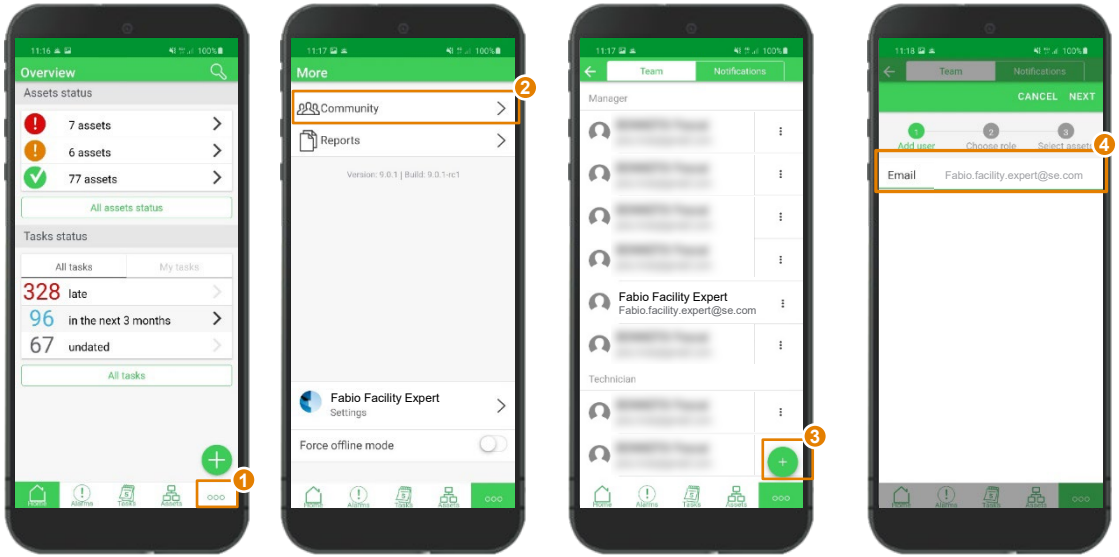


Find more details on abilities by User Profile in

APPENDIX

New EcoStruxure™ Facility Expert user

1. From Overview page click on "…"
2. Select "**Community**"
3. Click on "**+**"
4. Enter his/her **Email ID**

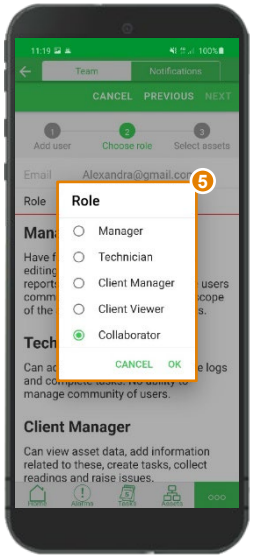


Enter new team member

New EcoStruxure™ Facility Expert user (cont.)

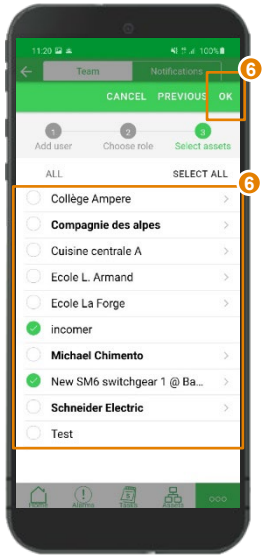
5

Select his/her **Role** from 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.

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

I OPERATE

I share asset information & collaborate

User profiles

Set up & manage users

- Add a new user
- Change user profiles
- Manage scope of assets
- Contact your community
- Remove user

I manage my assets library

I operate assets & manage tasks

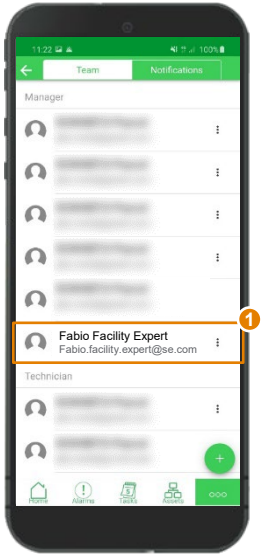
I receive alerts from my equipment

I access history & asset trending

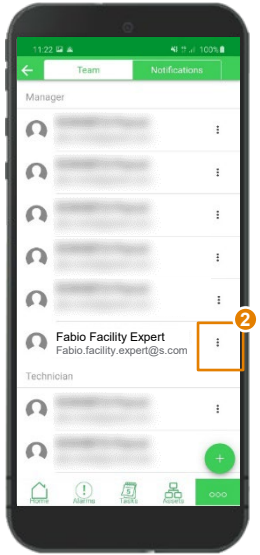
I operate my HVAC equipment

Change user profiles

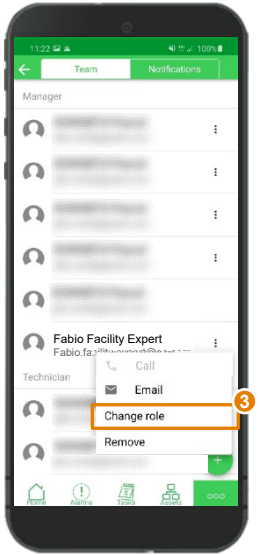
1. Find the user you want to modify his/her role in the list



2. Click on Icon on the right



3. Click on "**Change role**"

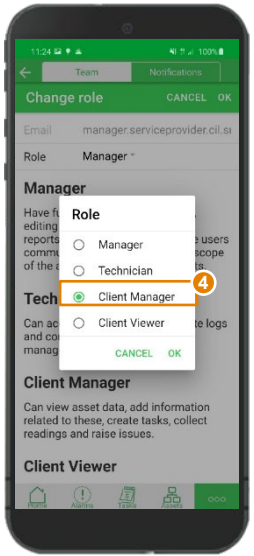


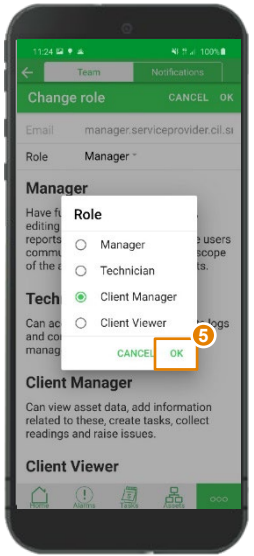
Note: only users with a manager profile can modify user role

Change user profiles (cont.)

4 Choose his/her new role in the list

5 Click on "**OK**" button to save





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

I OPERATE

I share asset information & collaborate

User profiles

Set up & manage users

- Add a new user
- Change user profiles

Manage scope of assets

- Contact your community
- Remove user

I manage my assets library

I operate assets & manage tasks

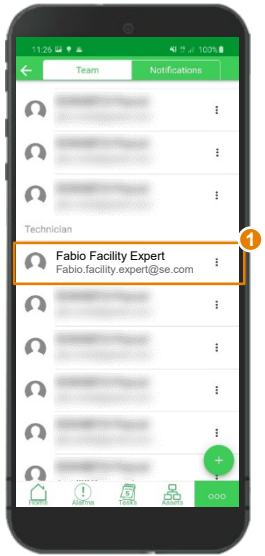
I receive alerts from my equipment

I access history & asset trending

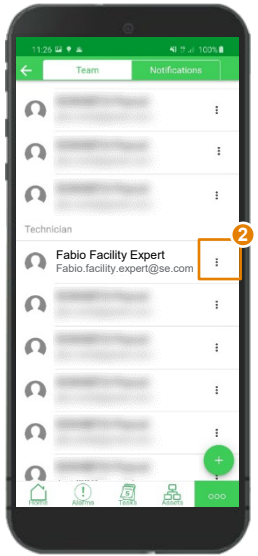
I operate my HVAC equipment

Manage scope of assets for each user

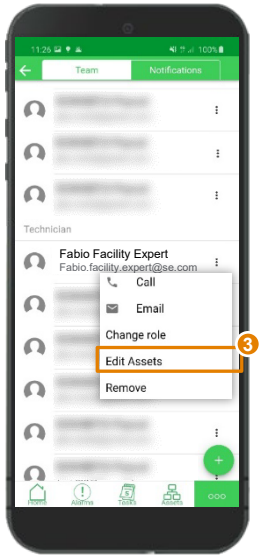
1 Find the user for who you want to modify the scope of assets in the list



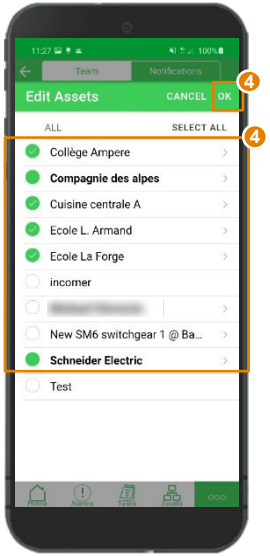
2 Click on Icon on the right



3 Click on "**Edit assets**"



4 Select the 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 be unable to change their scope of assets.

Learn how to transfer asset ownership from your "Asset list"

I OPERATE

I share asset information & collaborate

User profiles

Set up & manage users

- Add a new user
- Change user profiles
- Manage scope of assets

Contact your community

- Remove user

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

Contact your community

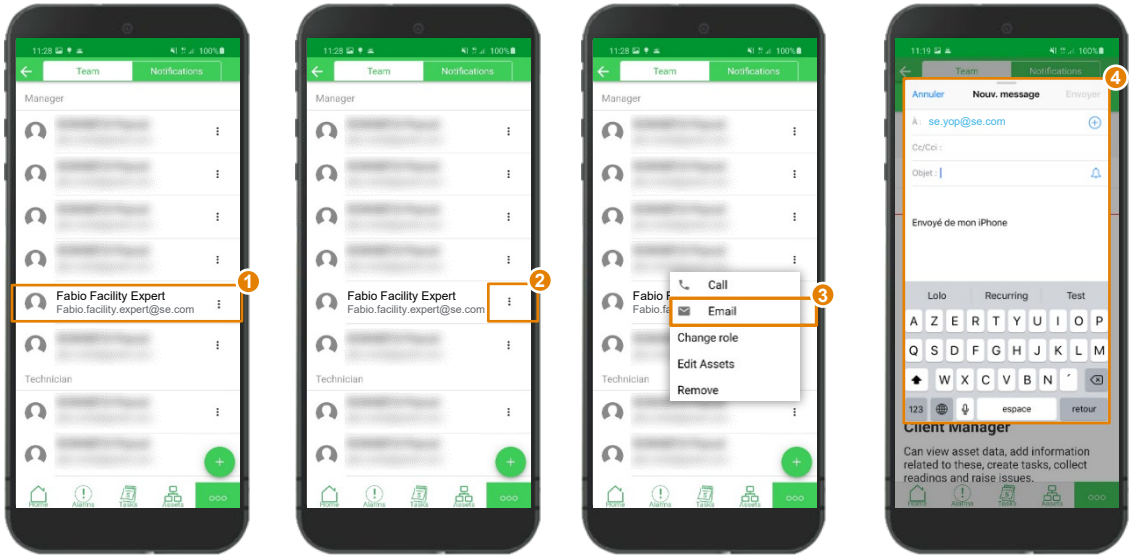
Your App now offers you the capability to easily contact any user of your team: colleagues, customers or contractors.

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 the message



To activate direct "**Call**" capability. users must enter their phone number in:
Settings > Profile, in the App

I OPERATE

I share asset information & collaborate

User profiles

Set up & manage users

- Add a new user
- Change user profiles
- Manage scope of assets
- Contact your community

Remove user

I manage my assets library

I operate assets & manage tasks

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I access history & asset trending

I operate my HVAC equipment

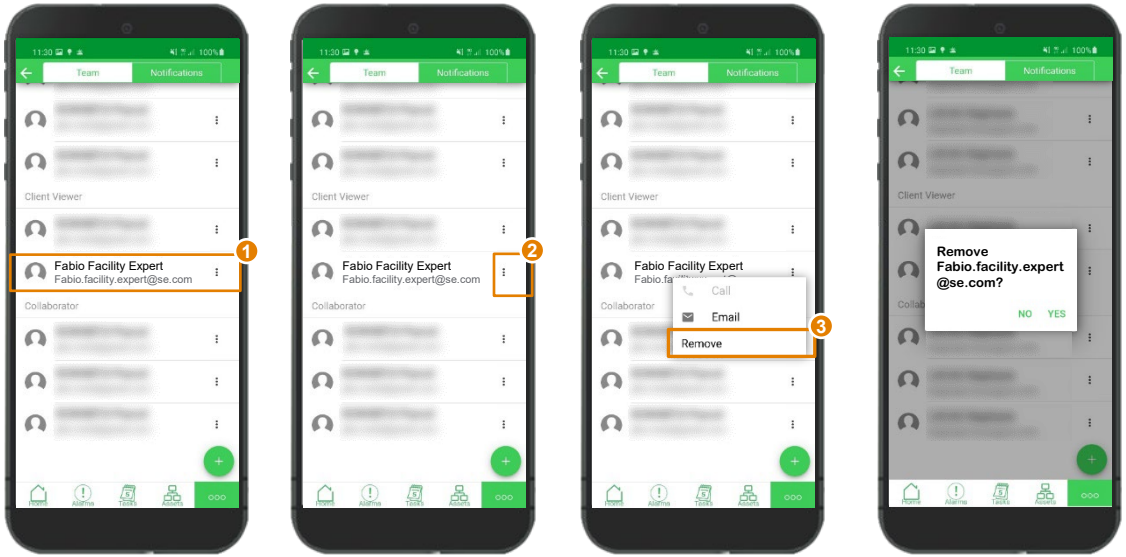
Remove a user from your team

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 remove someone from a group, the user will no longer be able to access your account and content.

However, you can always use the "**Add user**" capability of your App, to add them back to the team later.

I OPERATE

I share asset information & collaborate

I manage my assets library

Find an asset
Duplicate an asset
Delete an asset
Transfer an asset
Leave asset access
Update asset information

I operate assets & manage tasks

I receive alerts from my equipment

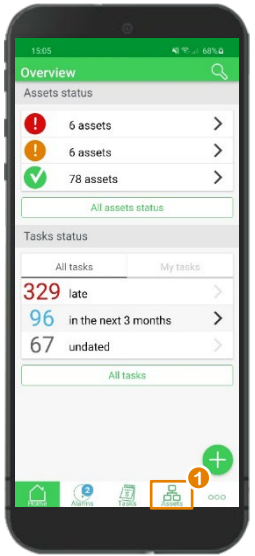
I access history & asset trending

I operate my HVAC equipment

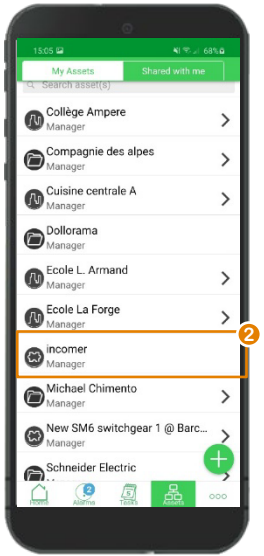
In EcoStruxure™ Facility Expert asset library, you can easily find one of your assets, modify it, delete it or transfer this asset ownership to another user.

Find an asset in your library

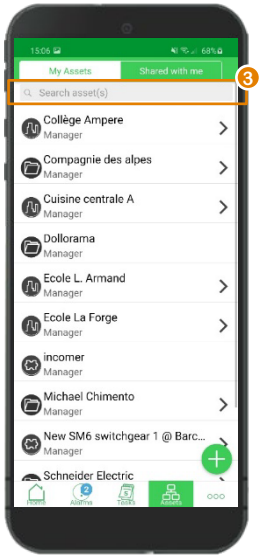
1 From "**Overview**", click on "**Assets**"



2 Then select the asset from the list



3 Otherwise, scroll down to show the search bar and type in the asset name



I OPERATE

I share asset information & collaborate

I manage my assets library

Find an asset

Filter by status

- Through Search
- Through Asset Menu

Duplicate an asset

Delete an asset

Transfer an asset

Leave asset access

Update asset information

I operate assets & manage tasks

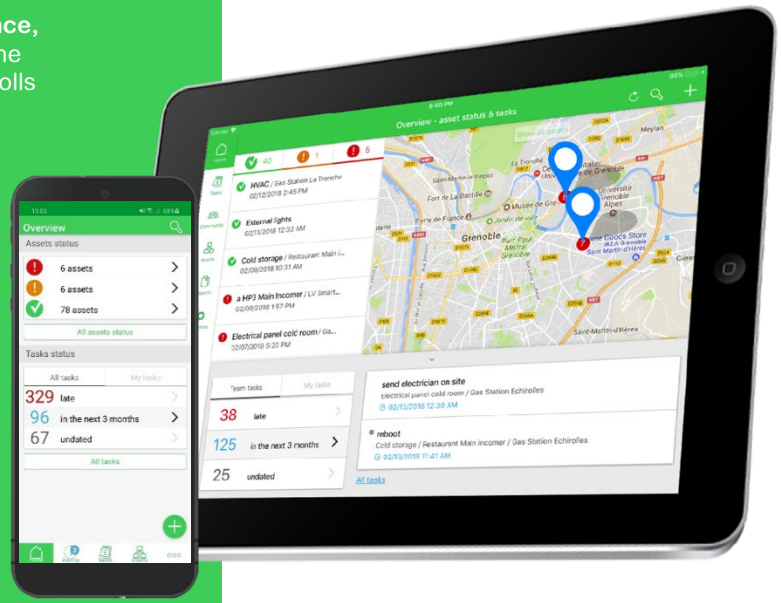
I receive alerts from my equipment

I access history & asset trending

I operate my HVAC equipment

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.



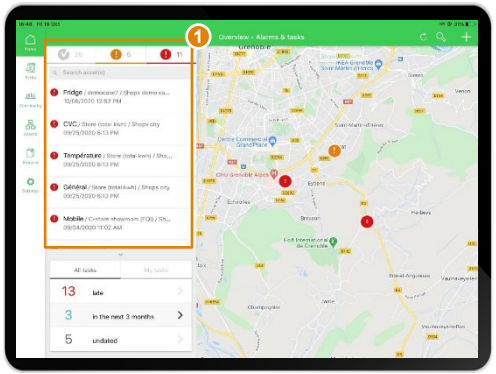
You can easily:

- Localize your assets and filter them by status
- Enter your asset name to check its status

Find an asset filtering by status

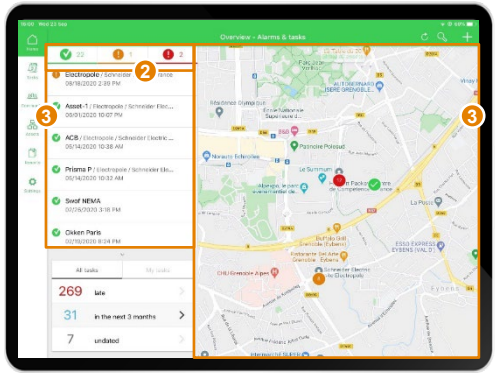
1

On Overview, you can view
Alert and Alarm status displayed by default



2

Click on asset status bar to select
the criticality you want to display



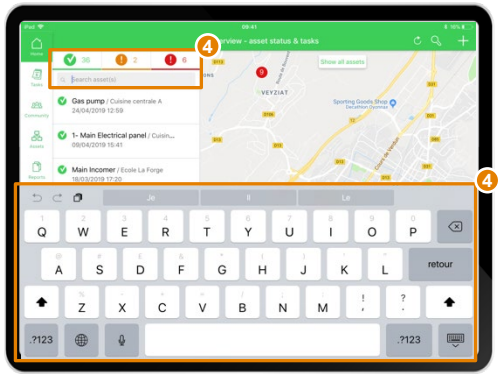
3

Filtering assets by status, disables other statuses in your list as well as on the map

Find an asset filtering Through Search

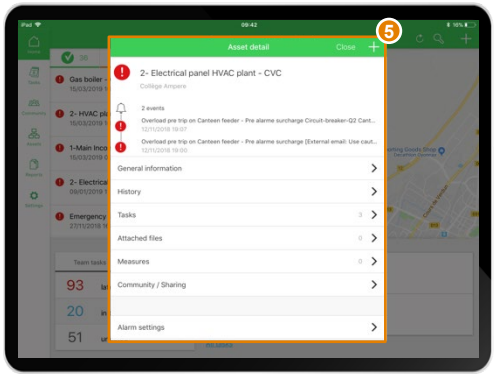
4

Scroll down to search asset
by name if needed



5

Then, access **asset detail** and
all related information

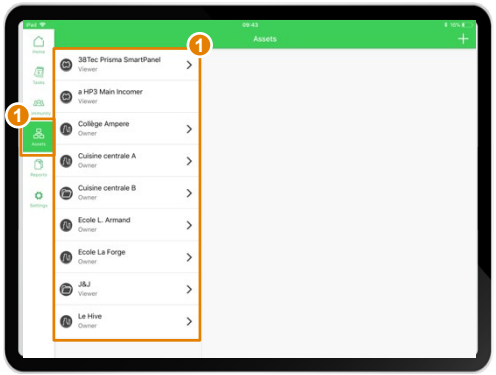


I OPERATE
I share asset information & collaborate
I manage my assets library
Find an asset
Filter by status
Through Search
Through Asset Menu
Duplicate an asset
Delete an asset
Transfer an asset
Leave asset access
Update asset information
I operate assets & manage tasks
I receive alerts from my equipment
I access history & asset trending
I operate my HVAC equipment

Find an asset by searching through Asset Menu or Tree view

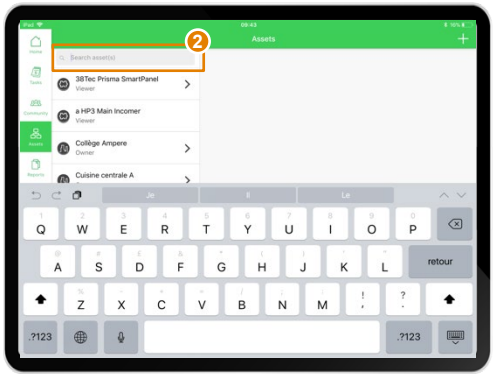
1

On Asset view, select the desired asset from the list



2

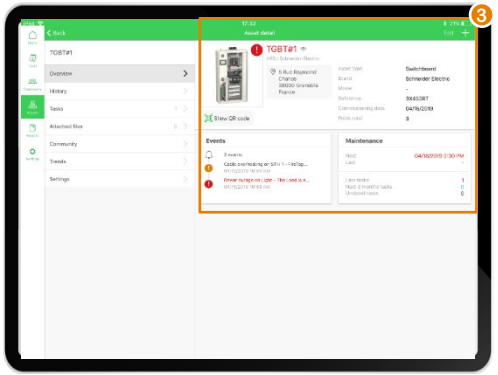
Or scroll down to enter asset name



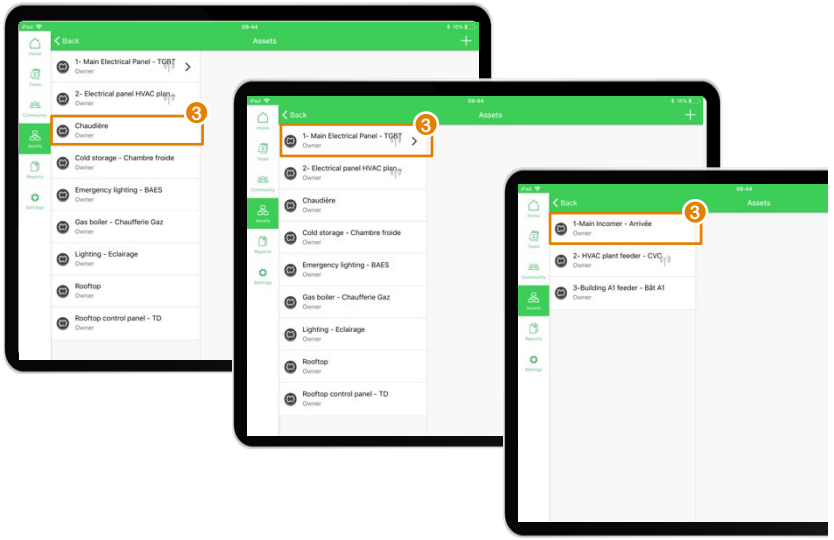
Find an asset by searching through Asset menu or Tree view (cont.)

3

View Asset detail…



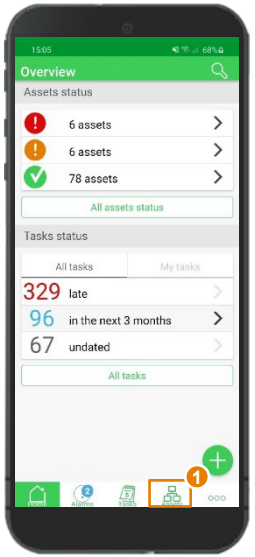
… Or navigate in your tree view, customer or building/panel/breaker for instance, until you find the asset



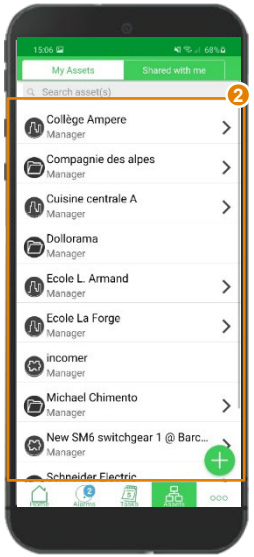
Duplicate an asset **with its maintenance plan**

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

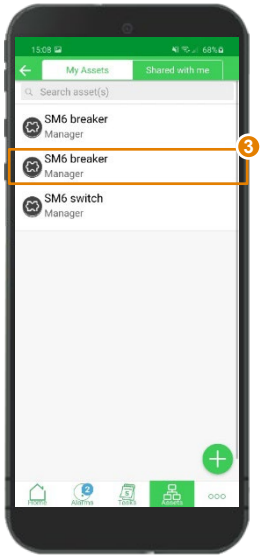
1 Click on "**Assets**"



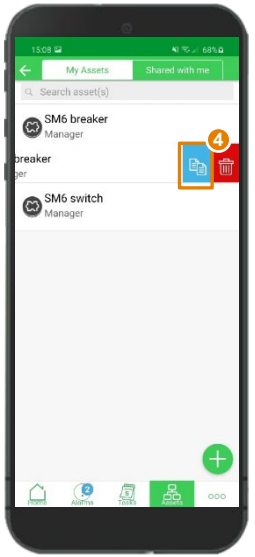
2 Scroll on the list to find the asset you want to duplicate



3 Select the asset



4 Then, swipe to the left on the asset and click the blue "**copy**" icon

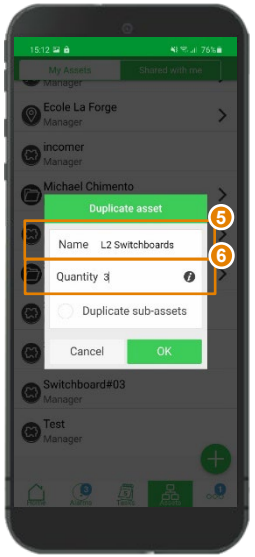


- Attached documents are not duplicated as they are contextual information
- Maintenance tasks keep their periodicity, but you must still select the first occurrence and assign the task to a contributor.

Duplicate an asset **with its maintenance plan**

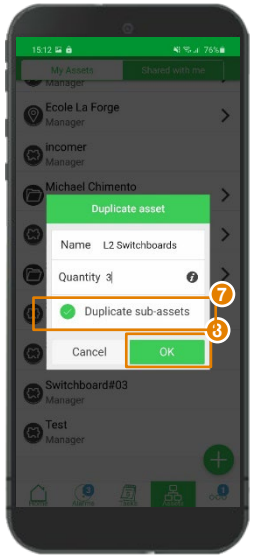
To avoid creating maintenance tasks for similar equipment you can simply duplicate the same asset already stored into your library and all the associated tasks will be duplicated with it (cont.).

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**

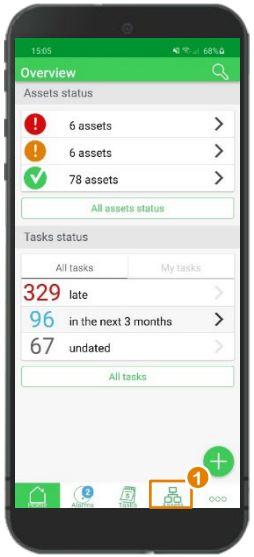


8 Click on "**OK**" to validate

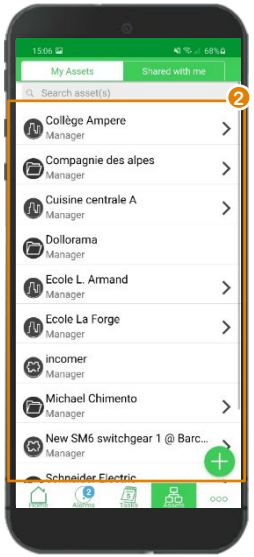
- Attached documents are not duplicated as they are contextual information
- Maintenance tasks keep their periodicity, but you must still select the first occurrence and assign the task to a contributor.

Delete an asset **from your library**

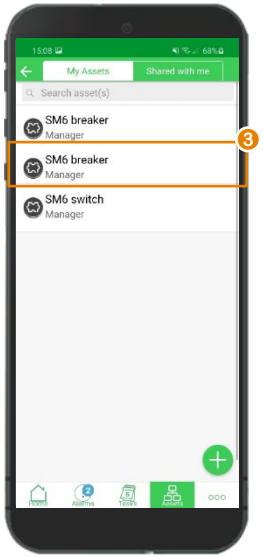
1 Click on “**Assets**”



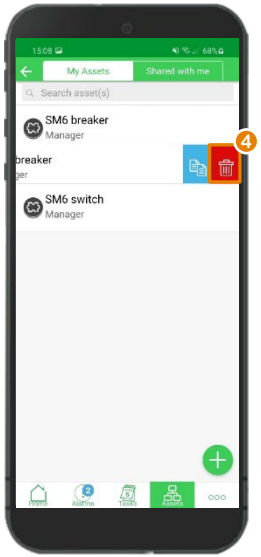
2 Scroll on the list to find the asset you want to delete



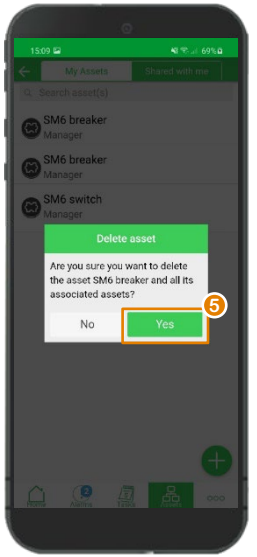
3 Select the asset



4 Then, swipe to the left on the asset and click the red “**bin**” icon



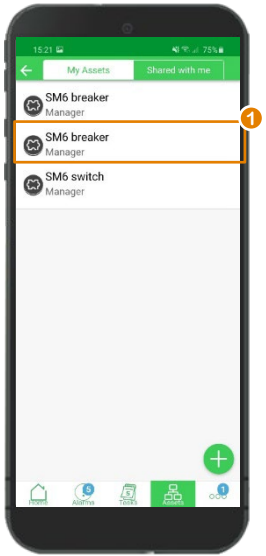
5 Confirm the deletion
Click “Yes”



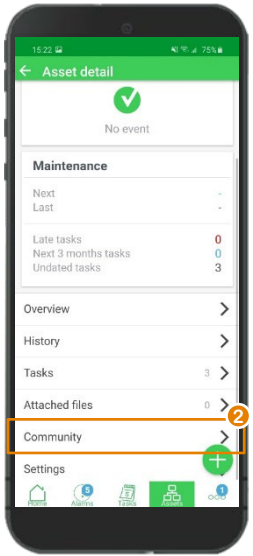
I OPERATE
I share asset information & collaborate
I manage my assets library
Find an asset
Duplicate an asset
Delete an asset
Transfer an asset
Leave asset access
Update asset information
I operate assets & manage tasks
I receive alerts from my equipment
I access history & asset trending
I operate my HVAC equipment

Transfer an **asset**

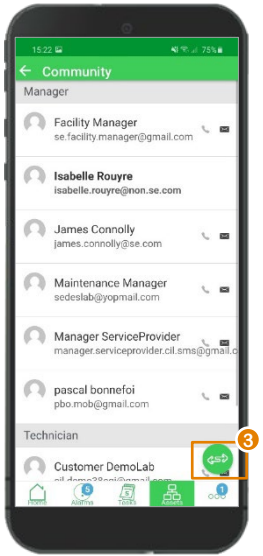
1 In your list, select the asset you would like to transfer



2 On its "**Asset detail**" overview, click "**Community**"



3 Click on "**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

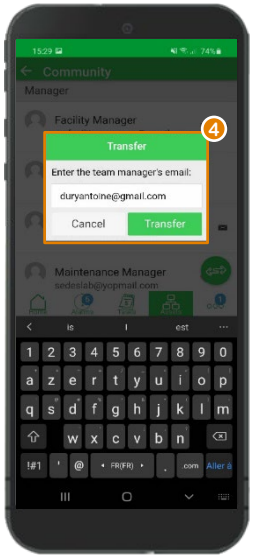
Find more details about "user profiles"

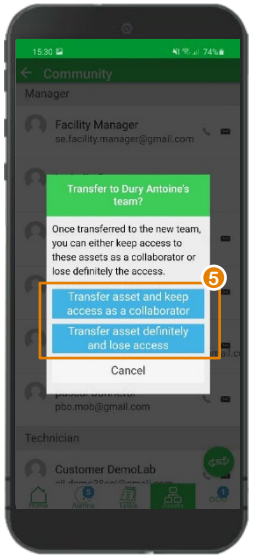
Transfer an **asset** (cont.)

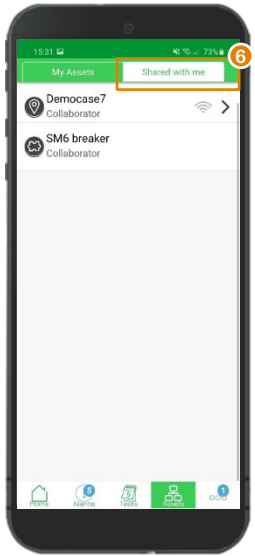
4 Enter team managers' email Id

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

Find more details about "user profiles"

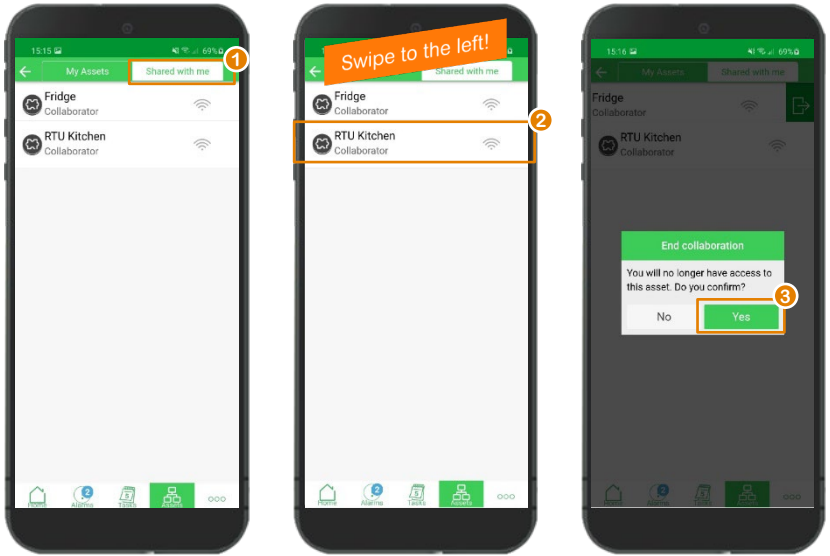
Leave asset access

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 left

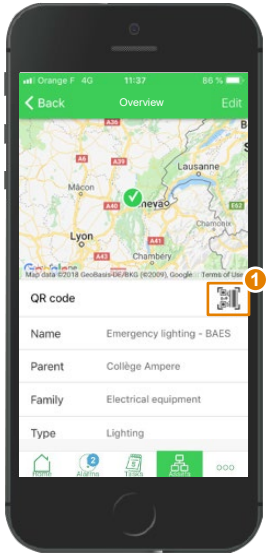
3 Confirm that you want to leave this asset access



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

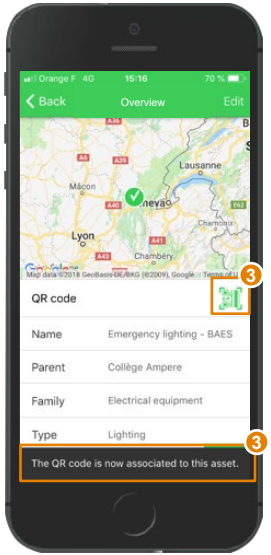


2

Scan the existing product QR code with your App

3

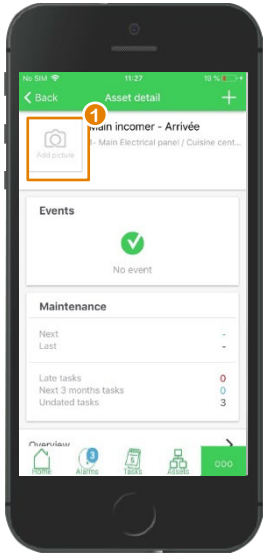
Associating this QR code with an equipment already registered in your library will turn QR code icon from grey to green



I OPERATE
I share asset information & collaborate
I manage my assets library
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

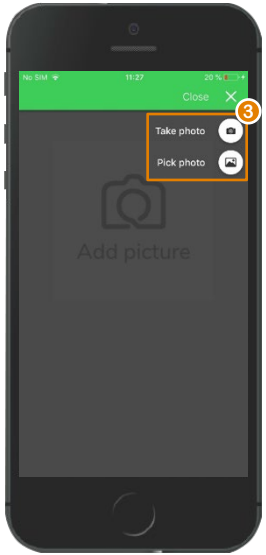
Add a picture from the field

1 On Asset detail view, click on the asset picture to add, change or delete it



2 Click on "**+**" button

3 Take a new photo or select one in your gallery



4 Click on"**Close**" to implement your choice

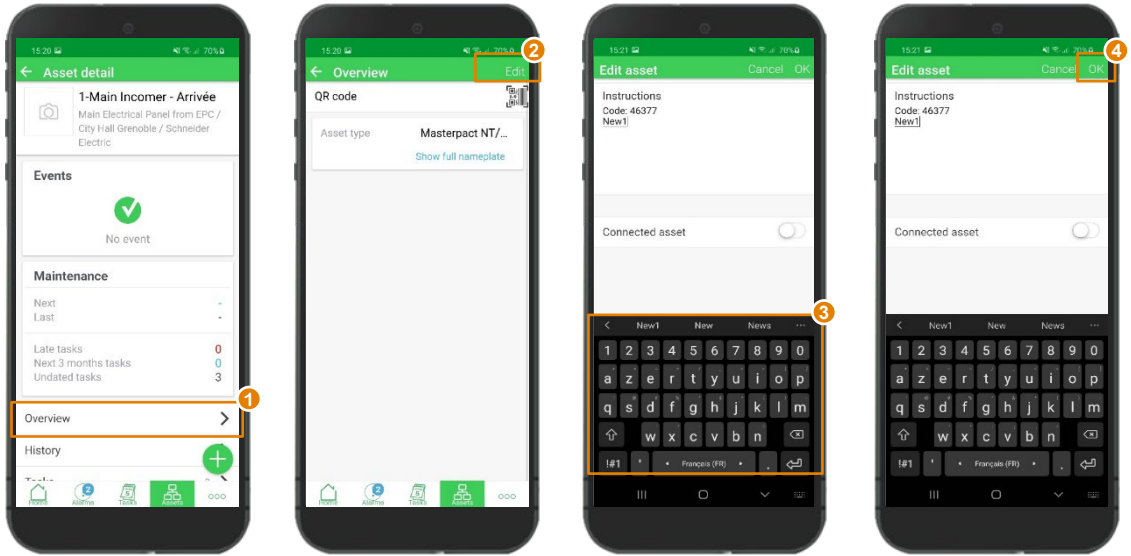
Edit information

1 On **“Asset detail”** view, click “**Overview**”

2 Click on“**Edit**”

3 Enter or modify asset characteristics, for instance, asset id

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.

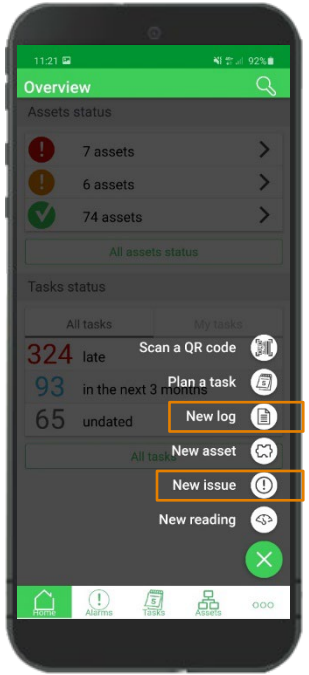
Graphic interface enables quicker understanding while lowering stress.

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 necessary 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.

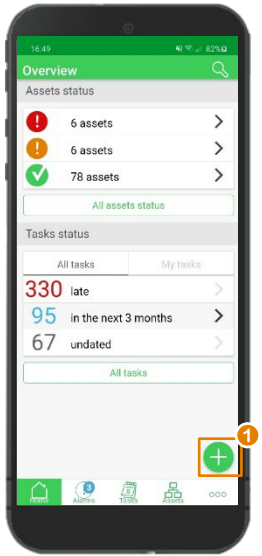
Read "glossary"

APPENDIX

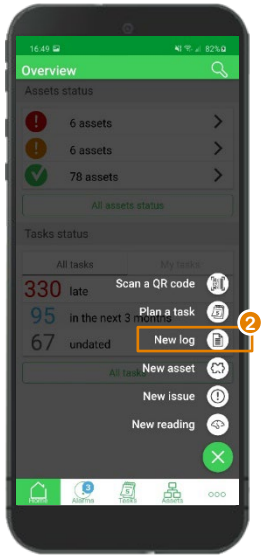
Log information about an operation

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

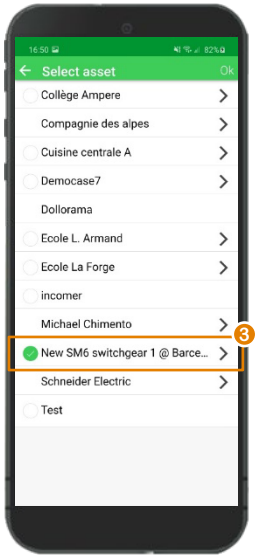
1 From **"Overview"** page click on **"+"**



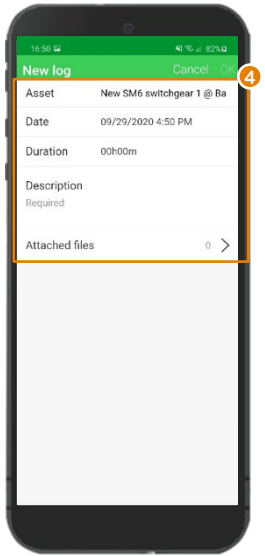
2 Select **"new log"**



3 Select the asset on the list



4 Complete information about the log

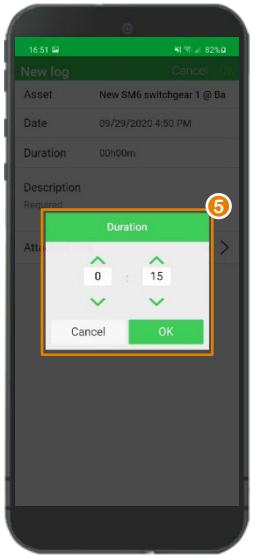


Logs are associated to assets only, not to folders

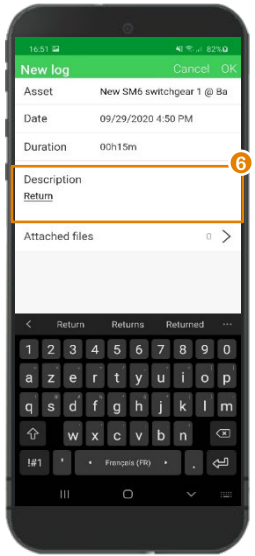
Log information about an operation (cont.)

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

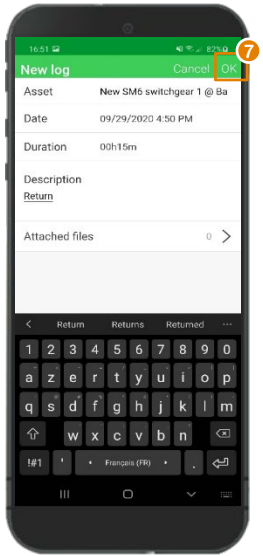
5 Date, duration



6 Describe what has been done on this asset



7 Click on "**OK**"



Logs are associated to assets only, not to folders

Log inspection or unplanned service

Manual readings can be logged and associated to an asset

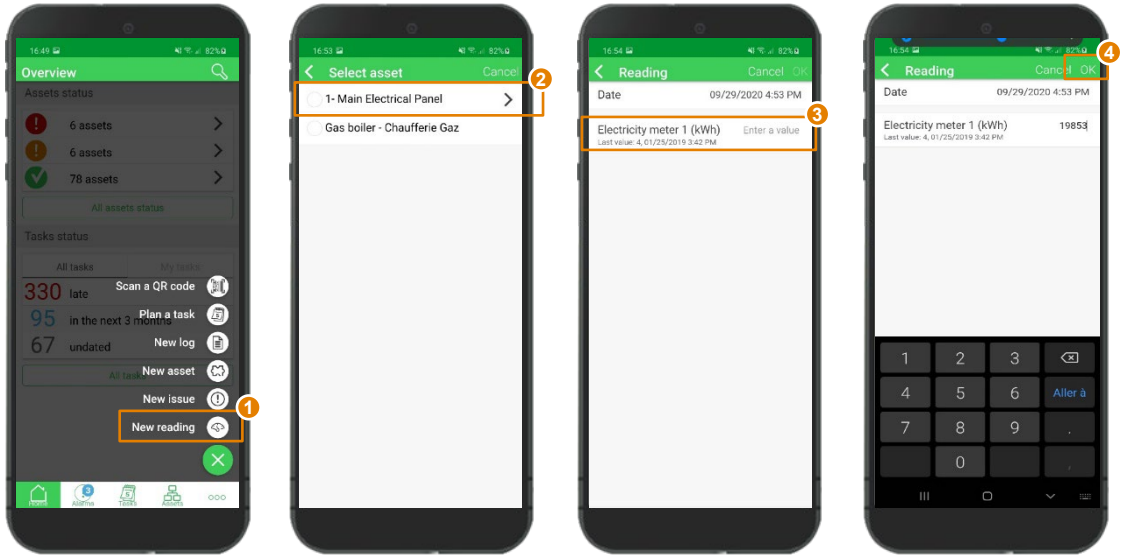
You can easily collect readings in the field with your EcoStruxure™ Facility Expert mobile App.

1 Click on shortcut "**New reading**" on quick access interface

2 Choose the asset or the meter – Only assets created with manual reading 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 required



- 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

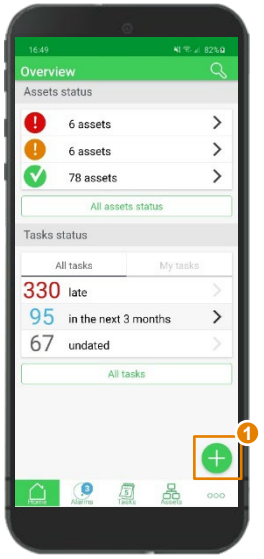
Store asset monitoring data

Read "create manual readings"

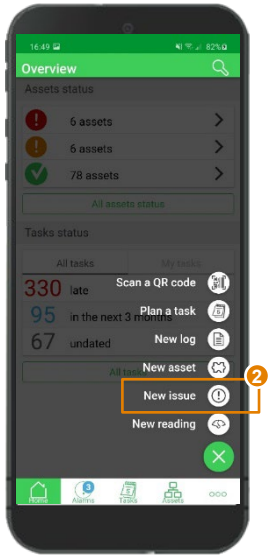
I OPERATE
I share asset information & collaborate
I manage my assets library
I operate assets & manage tasks
Log information about an operation or report an asset related issue
Log information about operation
Log manual readings
Report an asset related issue
Manage tasks
Generate reports
I receive alerts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

Report an asset-related issue

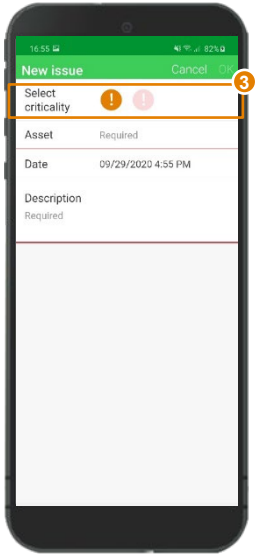
1 From **"Overview"** page click **"+"**



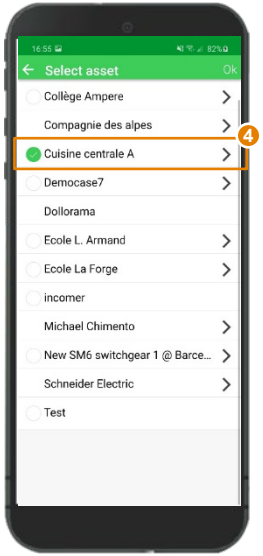
2 Select **"New issue"**



3 **"Select criticality"** (e.g. alarm = red)



4 Select the **"Asset"**



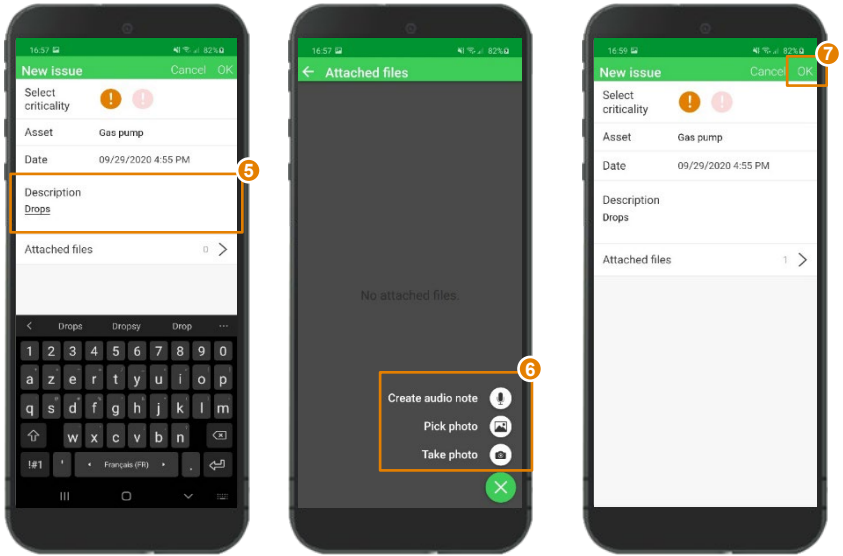
Discover how EcoStruxure™ Facility Expert can help you to analyse and solve the issue.

Report an asset-related issue (cont.)

5 Describe the issue

6 If required, add a picture or a voice memo

7 Click on "**OK**"
Whole team will be notified



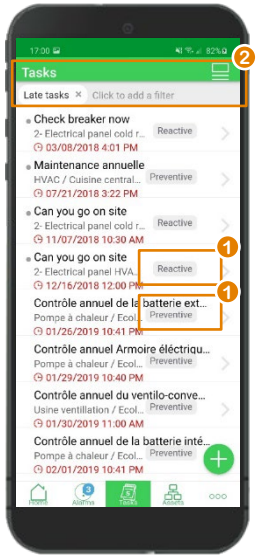
Report an asset-related issue

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

Filter tasks

1

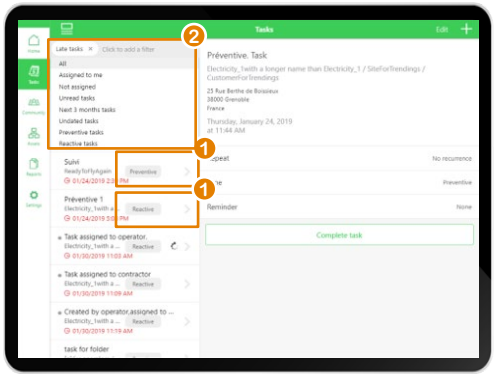
In your task list, a tag is associated to acknowledge its category: preventive, reactive, inspection or other.



2

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
- Inspection



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**"

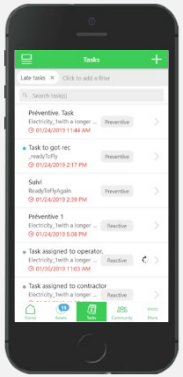
Learn how to assign a category to the task when you "Set up maintenance plan"

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

Complete a task

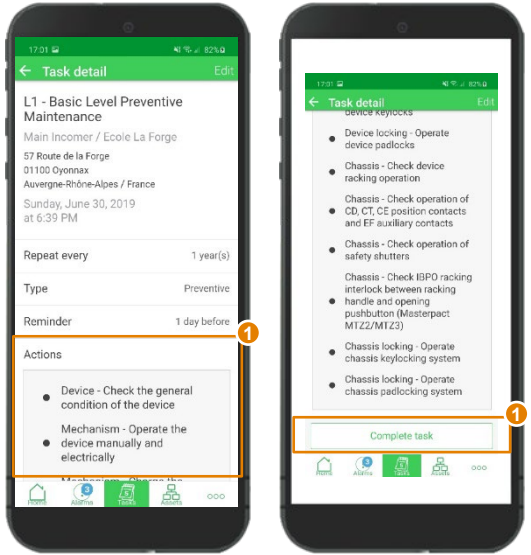
When a new task has been assigned to you:
- You receive a notification
- Or you may want to access your task manager to check tasks that have been assigned to you.

OR



1

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



Fix asset alert or alarm

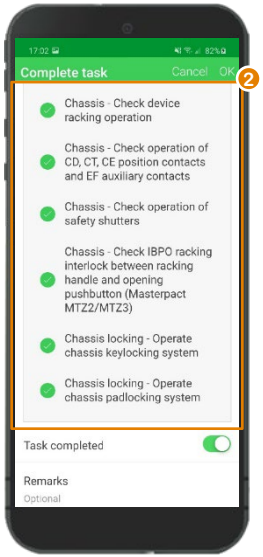
Complete a task (cont.)

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

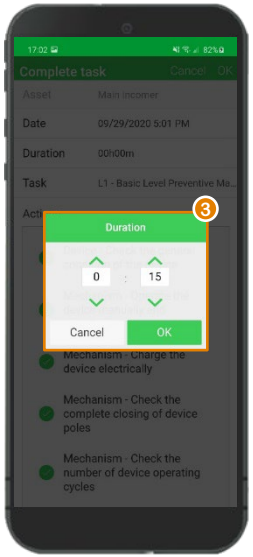
2

Check the actions list while performing intervention



3

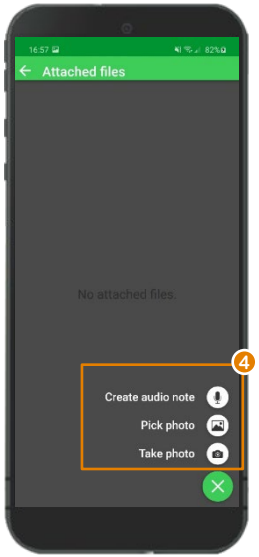
Enter duration of the intervention



4

Attach a file and add a comment, if needed

Your community will be notified that the intervention has been done



Then generate and store related intervention report

Generate and store related intervention report

Fix asset alert or alarm

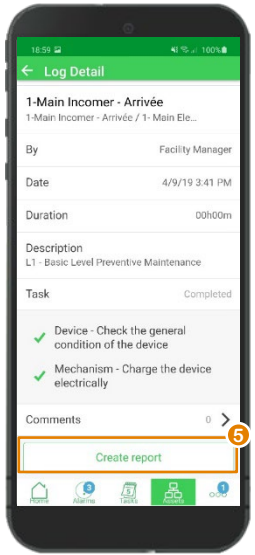
Complete a task (cont.)

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.

5

You can access to the task completed detail in your asset **History**, and generate its related **intervention report**



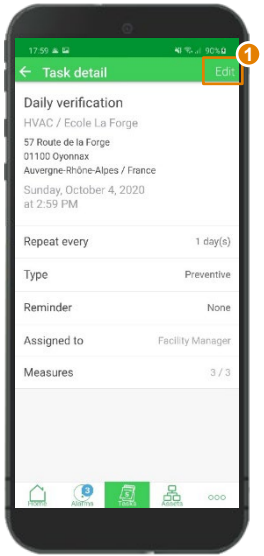
Fix asset alert or alarm

Generate and store related intervention report

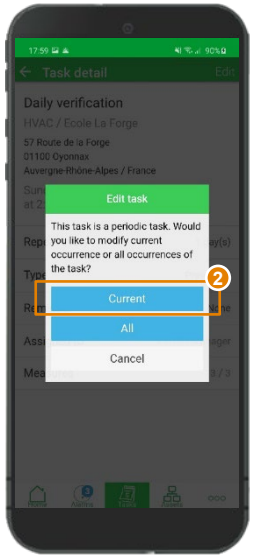
I OPERATE
I share asset information & collaborate
I manage my assets library
I operate assets & manage tasks
Log information about an operation or report an asset related issue
Manage tasks
Filter task
Complete a task
Modify task occurence
Generate reports
I receive alerts from my equipment
I access history & asset trending
I operate my HVAC equipment

Modify task occurrence: modify **one** occurrence

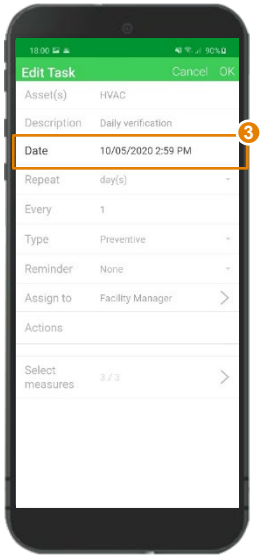
1 Select a task, in Task details click on **Edit**



2 Choose **Current**

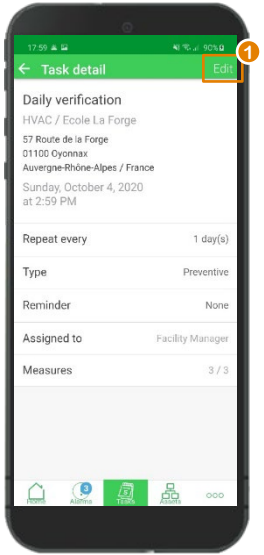


3 Change and enter new **date**

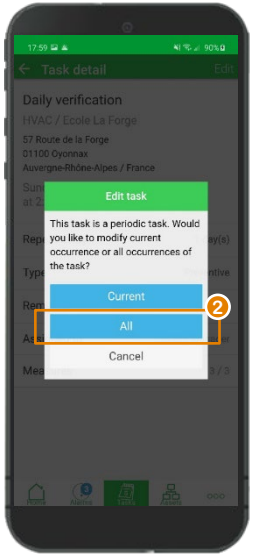


Modify task occurrence: modify **all** occurrences

1 Edit task



2 Choose **All**



Set up a new maintenance plan

Learn how to set up a maintenance plan

Generate reports Introduction

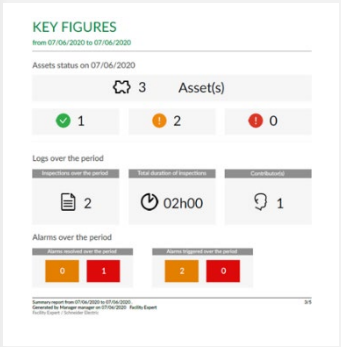
EcoStruxure™ Facility Expert helps you to ensure maintenance traceability and to prove compliance with applicable regulations to your customers by generating intervention or summary reports.

In a single click you can generate detailed reports in the field and thus, reduce administrative tasks and demonstrate that the job is done.

SUMMARY REPORT

MAIN INFORMATION OF YOUR **SUMMARY REPORT** ARE:

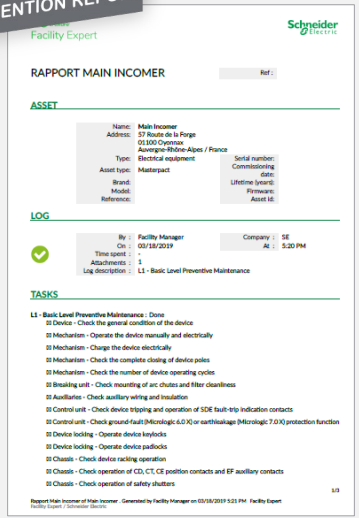
- **Key figures**
  - Assets status at generation date
  - Logs details over the period (number of inspections, total duration, number of contributors)
  - Main alerts/alarms KPI
- **Asset synthesis**
  - Site details
  - Logs over the period (asset, log description, date, status, duration)
  - Late/upcoming maintenance tasks of the next 3 months (asset, task, date)
  - Measures (asset, measure, date, value)



INTERVENTION REPORT

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

Customize your summary or log reports

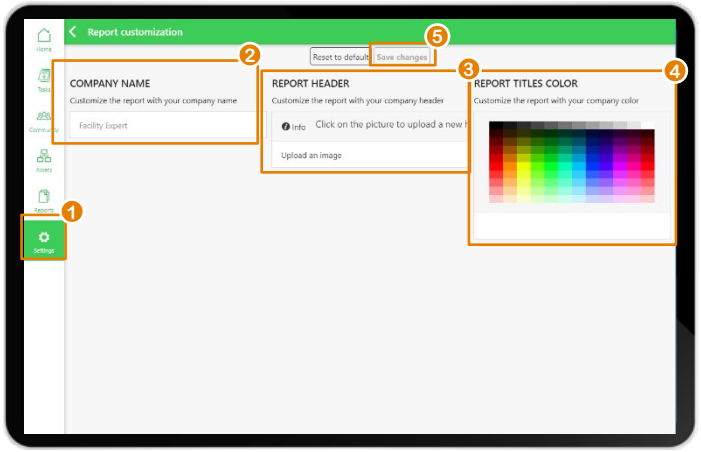
From your tablet or web portal you can customize operations reports with company name, company logo and color.

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**

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

Note: this function is not available from your smartphone

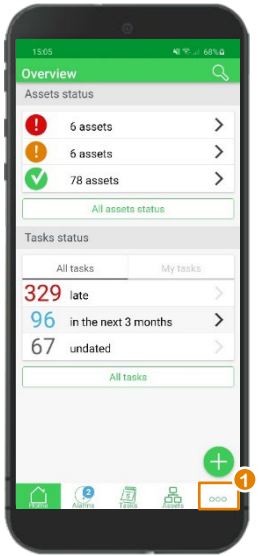


Customized information will be used in **SUMMARY REPORTS** and **LOG REPORTS**

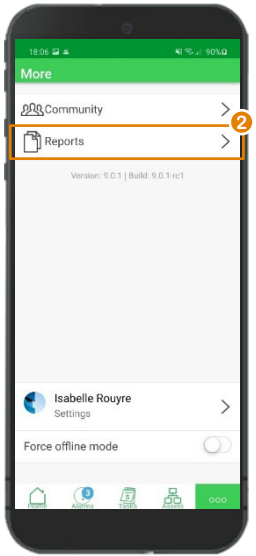
Generate Intervention reports

After an intervention log

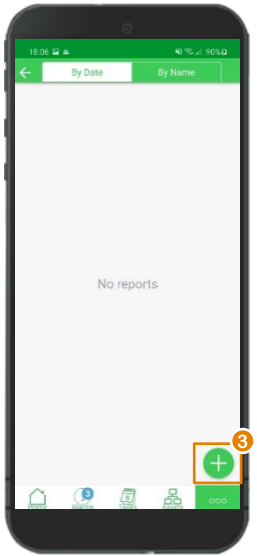
1 From overview page click on "…"



2 Select "**Reports**"



3 Click on "**+**"



4 Select the report type "**log report**"

Create and send Operation Reports

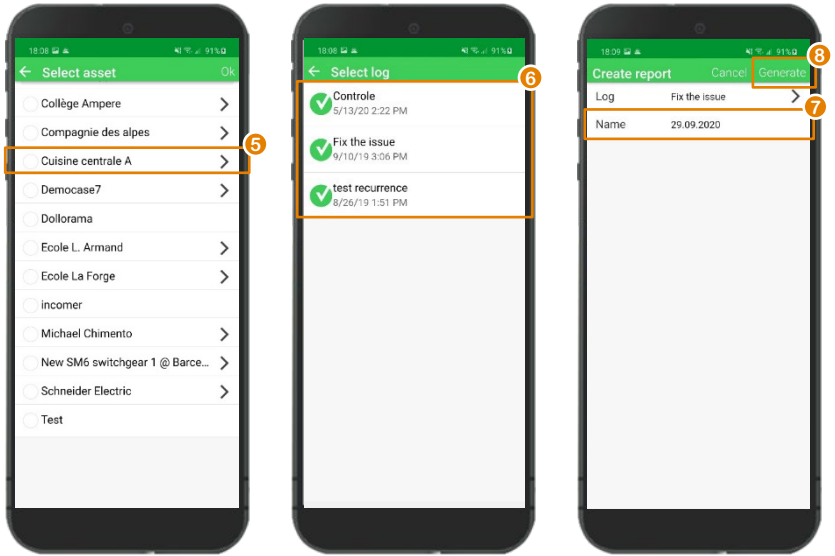
Generate Intervention reports (cont.)

After an intervention log

5 Select equipment

6 Select one log

7 Name your report



8 Click on "**Generate**"

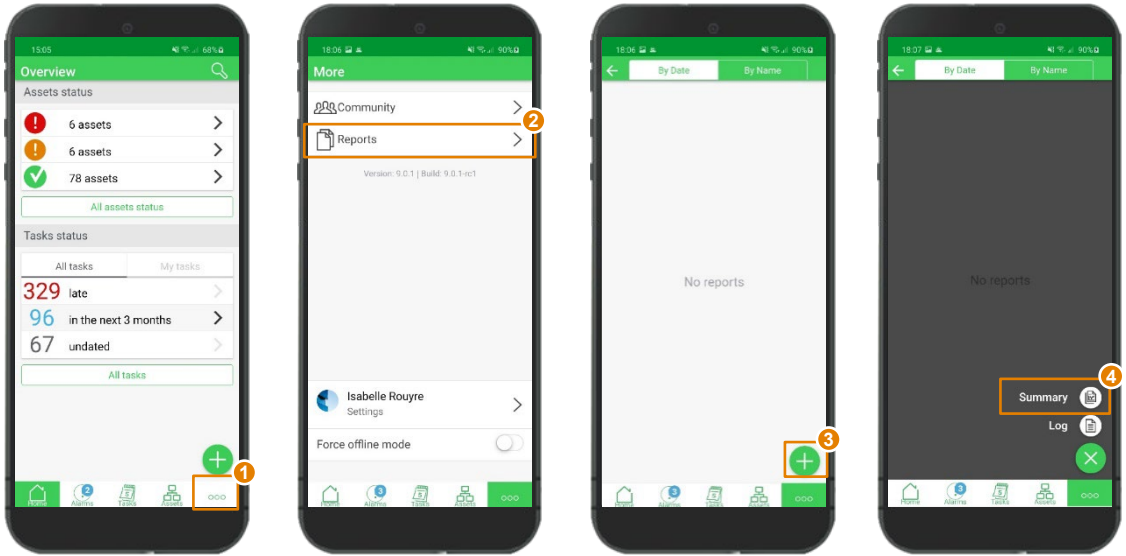
Create and send Operation Reports

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
Manage tasks
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

Generate Summary reports

After a log or a task

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



Generate summary reports (cont.)

After a log or a task

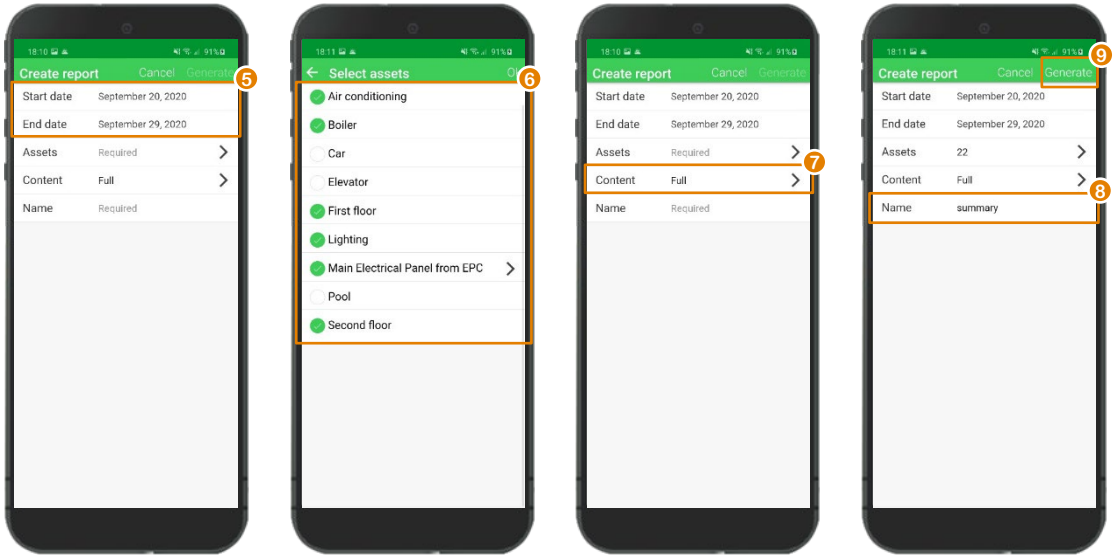
5 Select Start/End date

6 Select assets

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

8 Name your report

9 Click on "**Generate**"



I OPERATE
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Generate Intervention reports
Generate Summary reports
Access all your reports
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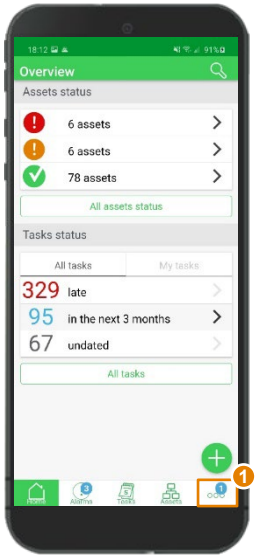
I operate my HVAC equipment

Access your reports

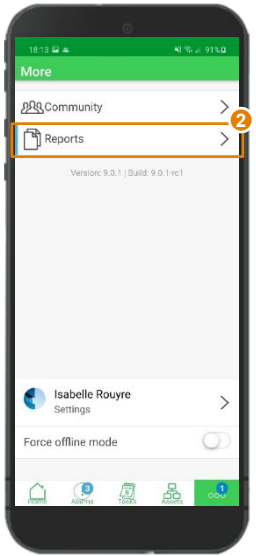
1

From overview page click on "…"



2

Select "**Reports**"



3

Find your report in the list

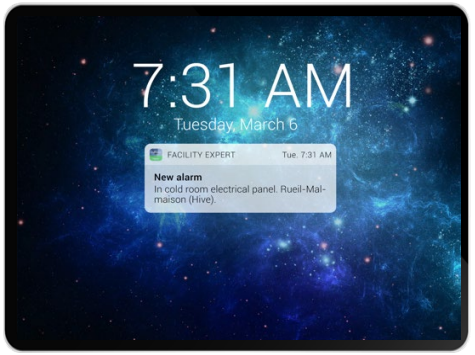
Introduction

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 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 wherever 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.

Maintenance reminders



Alert/alarm notifications

Upon network availability, be notified from your connected assets through:

- Preconfigured alarms with Schneider Electric equipment
- Manual settings for custom alarms on threshold

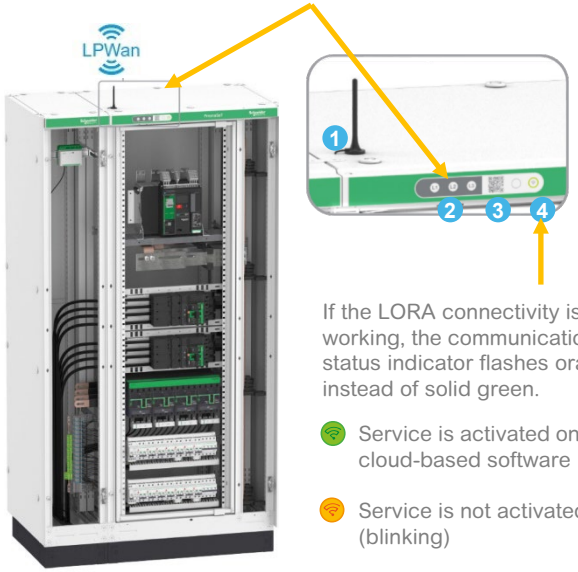
Discover how to set alarm rules

Alerts sent from PrismaSeT Active wireless panel

The Voltage loss alert service provides commercial and industrial building 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.



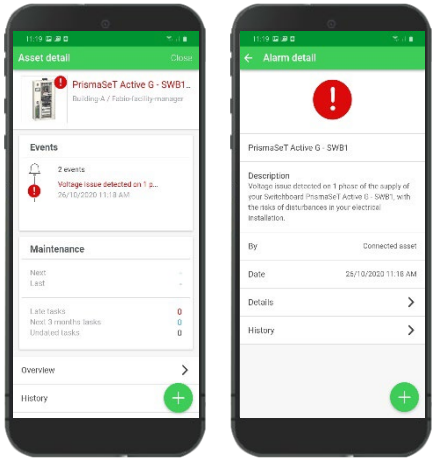
If the LORA connectivity is not working, the communication status indicator flashes orange instead of solid green.

- Service is activated on cloud-based software
- Service is not activated (blinking)

Remote alarms 24/7 on EcoStruxure Facility Expert

The dedicated alert receiver is instantly notified from a distance

Can access the alert detail and asset information through EcoStruxure Facility Expert account



Learn more about Voltage Loss Application

schneider-electric.com

Alerts sent from Prisma**Set** Active wireless panel

Implementing PowerLogic HeatTag sensor into Prisma**Set** 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 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 level of alerts depending on severity

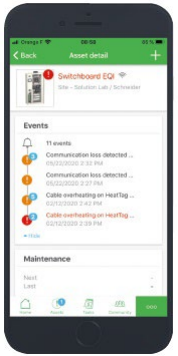
- Measures ambient temperature and hygrometry
- Provides switchboard air quality index

Sensor self-diagnosis

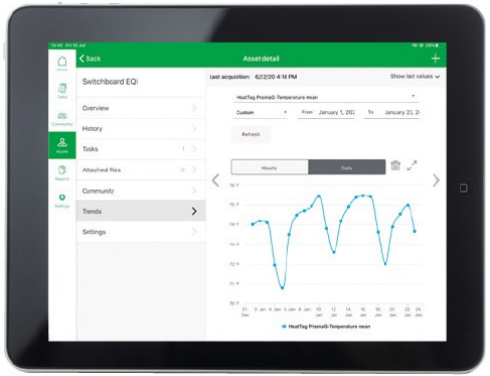
- Fan maintenance alert
- Sensor health alert

Remote alarms 24/7 on EcoStruxure Facility Expert

The asset manager receives remote alerts with actionable details



Can access detailed dashboard for continuous monitoring and trends to analyze switchboard condition.



Learn more about Detection of Cable Connection Overheating Application

schneider-electric.com

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
Alerts sent from PrismaSet Active wireless panel
Other example of asset event alarms
Conduct preventive maintenance or troubleshooting
Execute operation
I access history & asset trending
I operate my HVAC equipment

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.

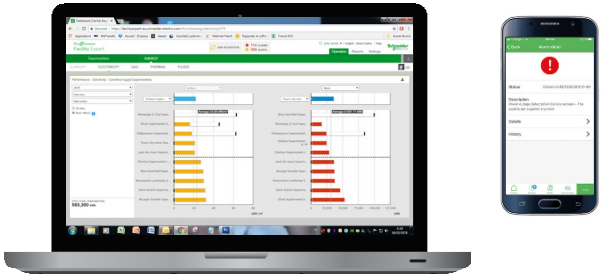
PowerTag Energy
Wireless sensor for load management and asset protection

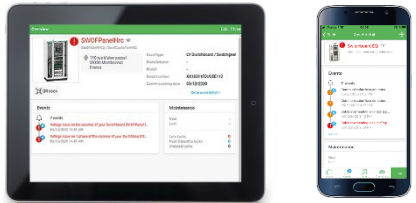
These wireless power sensors provide high-density energy metering for easy load management and asset protection. They can differentiate between lighting, cooking, and HVAC usage and inform on circuit breaker trips and usage alarms.

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





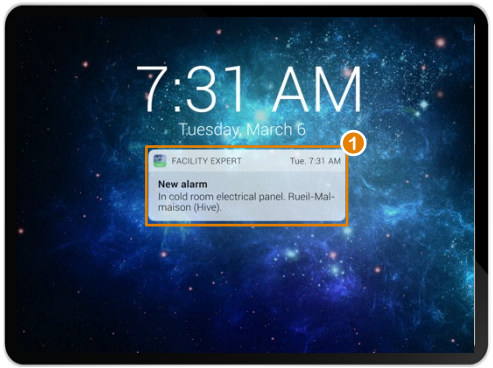
Remote alarms with actionable details

- Alerts on power outage with causes identification and recommendations
- Notification on mobile devices
- Load condition monitoring
- New PowerTag installation after service activation in PrismaSeT Active

Conduct preventive maintenance or troubleshooting

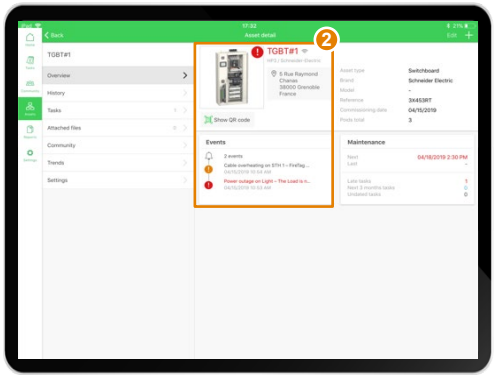
1

Click on the notification



2

To access asset detail helping you identify the problem with actionable information



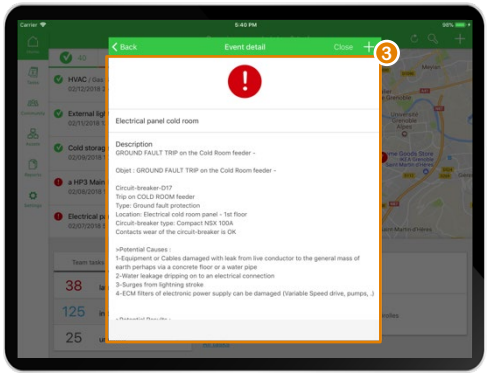
Note: in setting/notification preference you can decide to disable notifications. Regarding alarm, alerts, task assignment, new log. Be aware that when you disable alarm/alerts notification you will not be notified in case of issue.

Conduct troubleshooting

Conduct preventive maintenance or troubleshooting (cont.)

3

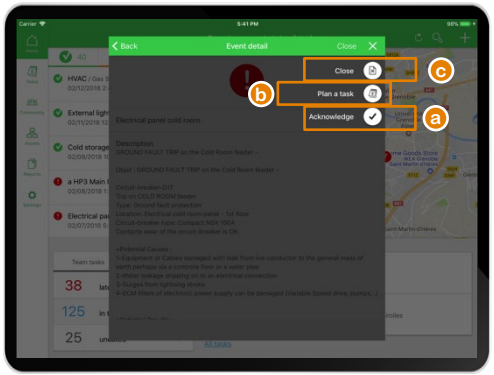
Then click on the alarm itself to change the issue status



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 automatically propose to close the issue once the task is completed.

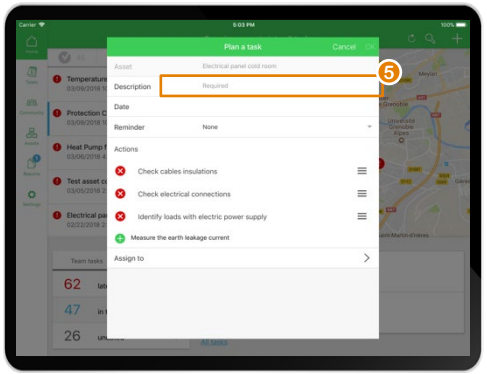
Conduct troubleshooting

Conduct preventive maintenance or troubleshooting (cont.)

If you decide to plan a task you can:

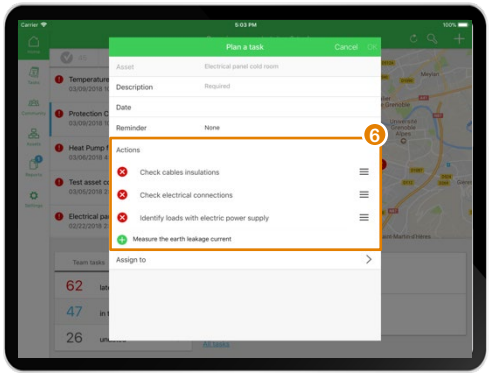
5

Describe the new task



6

Select or enter actions to be performed

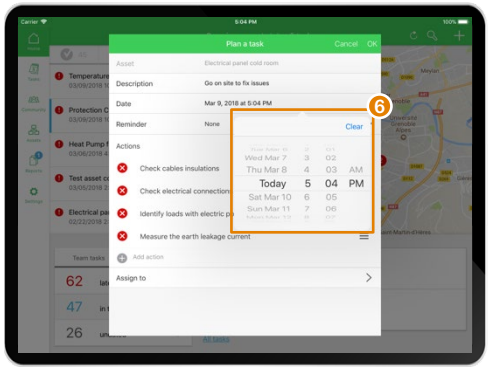


Conduct troubleshooting

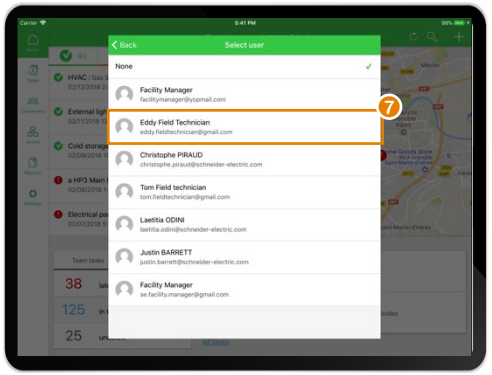
Conduct preventive maintenance or troubleshooting (cont.)

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

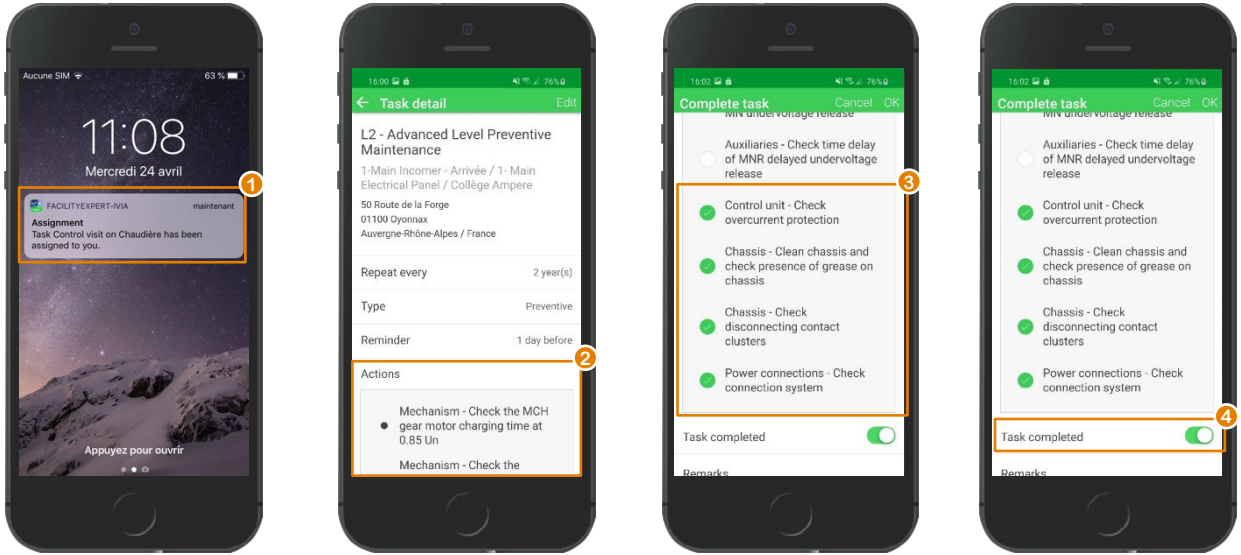
A new task has been assigned to you:

1 You receive a notification

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

3 Check the action to be performed

4 Complete the task



Execute Operation

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

Execute operation

A new task has been assigned to you:

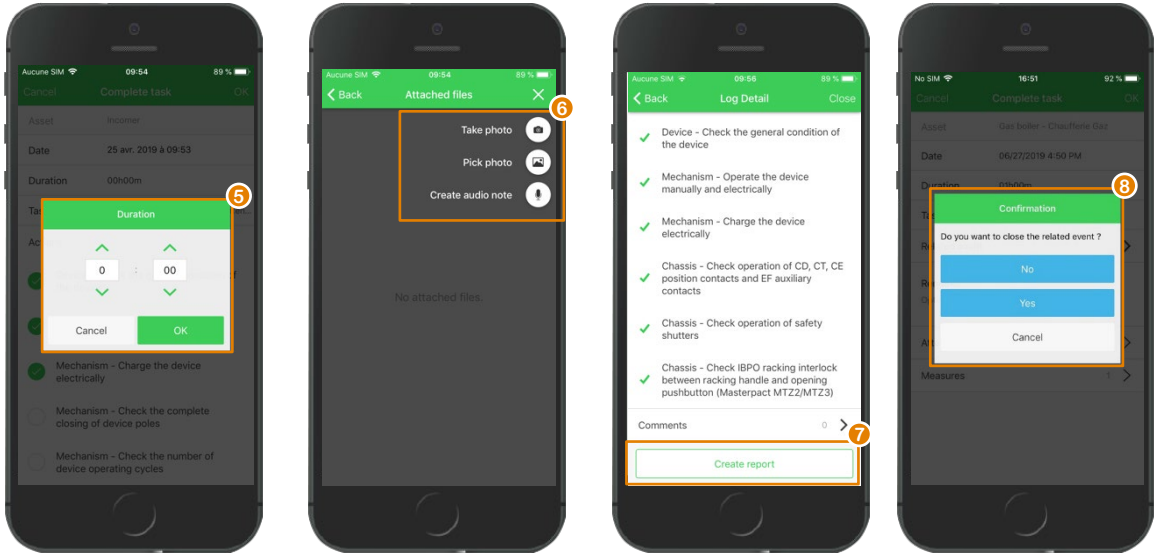
5 Enter duration of the intervention

6 Attach additional information if needed

7 Create report

8 Close the alarm

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



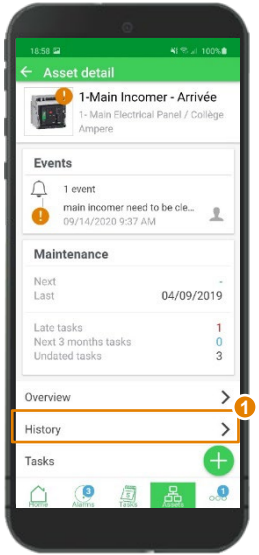
Execute Operation

Access asset history

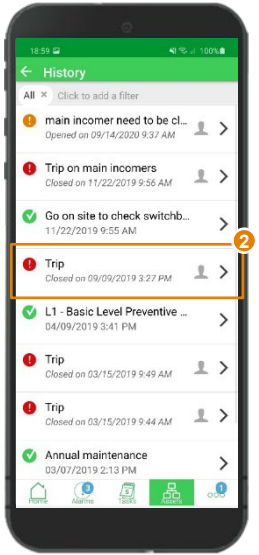
Equipment maintenance logs provide rich historical data that can be analyzed to provide insights on an asset's performance compared to similar devices. In addition, keeping maintenance logs updated is proof that assets are being taken care of.

In asset detail:

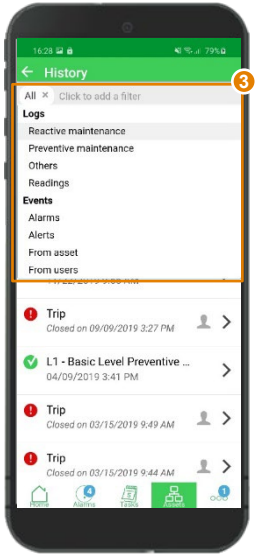
1 Scroll down to access "History" tab and click



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:



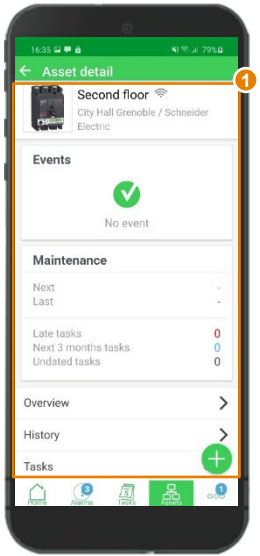
You can activate several tags as required

- Preventive maintenance
- Reactive maintenance
- Inspection
- Manual readings
- Alarms / alerts from connected assets
- Alarms / alerts raised manually by users

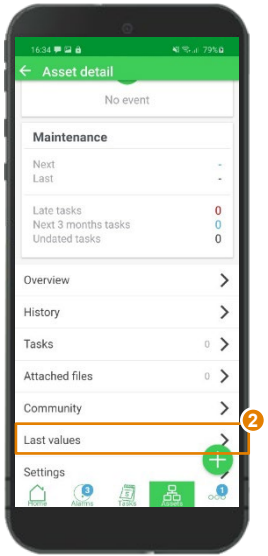
Access asset data last values from your **smartphone**

In Trends tab you can **access the variable** of the connected assets being monitored.

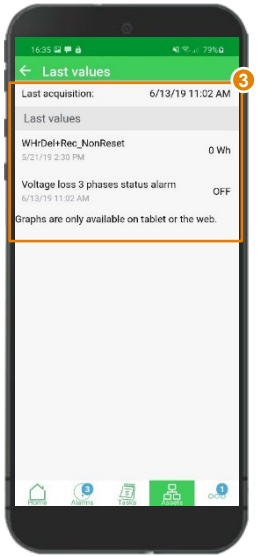
1 Scroll down to access "**Last Values**" tab



2 Click on it



3 Access the last data received from the cloud



Note: for pre-defined Schneider Electric assets, all the variables are predefined and set

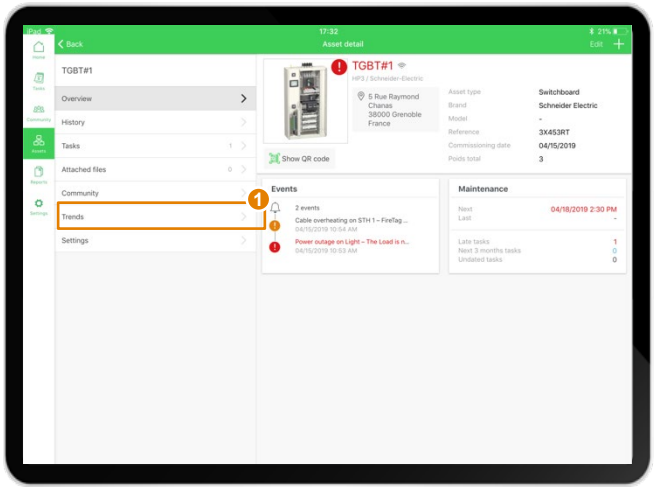
Access asset data trending for analysis from **tablet** or **webApp**

On your Asset "Trends" tab you can **set and access graph with variable of the connected assets** being monitored.

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

1

On "**Asset detail**" click on "**Trends**"



EcoStruxure™ Facility Expert assures that your assets are covered under a proactive and digital maintenance program including automatic reminders that helps you improve your maintenance efficiency.

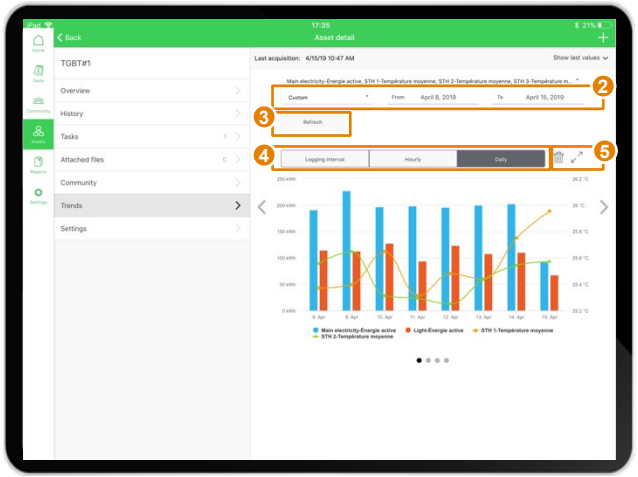
Note: for pre-defined Schneider Electric assets, the graphs are already set. You can create up to 7 graphs by clicking "+" button

Access asset data trending for analysis from your **tablet** or **webApp (cont.)**

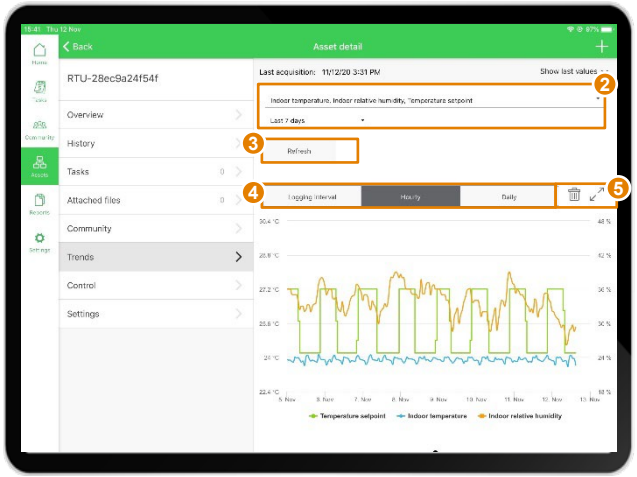
On your Asset "Trends" tab you can **set and access graph with variable of the connected assets** being monitored.

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

2. Select the variables and period you want to display in the graph
3. Click on "**Refresh**" to generate the graph
4. Choose interval (logging/hour/day/ week/month)
5. You can also visualize the graph in full screen mode or delete it



Switchboard (E.g.):
main consumptions and panel ambient temperature monitoring with PowerLogic HeatTag



Roof Top Unit (E.g.):
Space indoor monitoring temperature, humidity, temperature and temperature setpoints

Access **Energy index** from tablet or smartphone.

If any PowerTag devices are installed in the switchboard, EcoStruxure Facility Expert displays kWh index in "**Asset details**" interface.

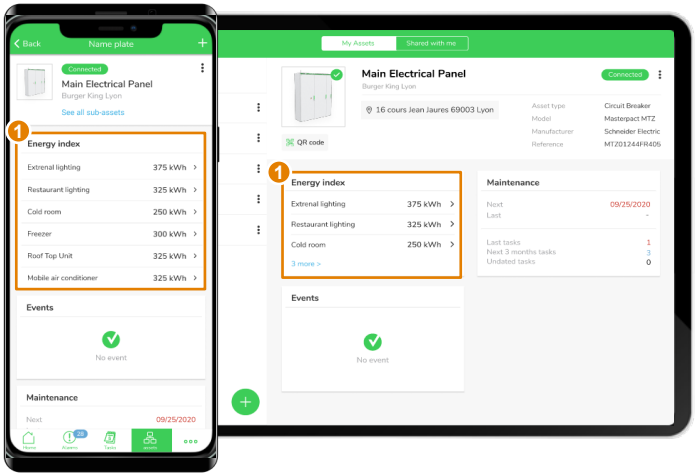
1

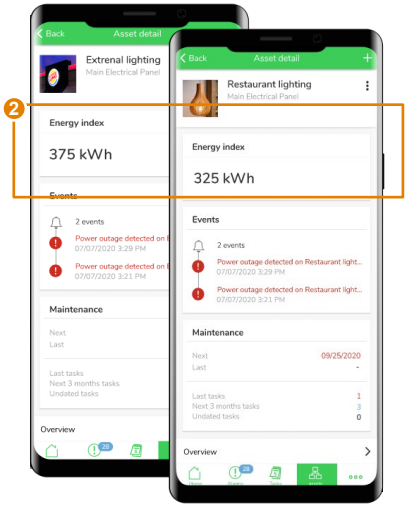
Summary view of kWh usage
of each PowerTag sensor at panel level

Click on each PowerTag to get its Energy Index view.

2

And for each PowerTag





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)

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 manager, 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

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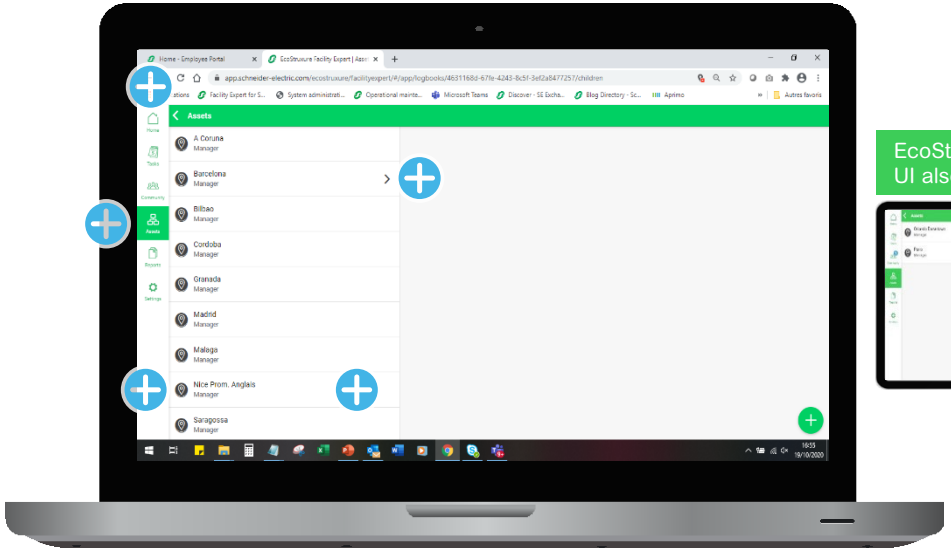
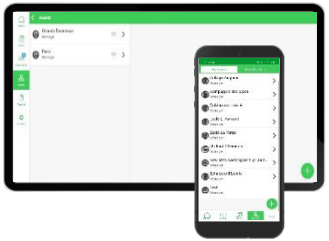
I operate my equipment on multi-site buildings



EcoStruxure™ Facility Expert UI also available on mobility.



More details about Ecostruxure™ Facility Expert -Enterprise:

APPENDIX

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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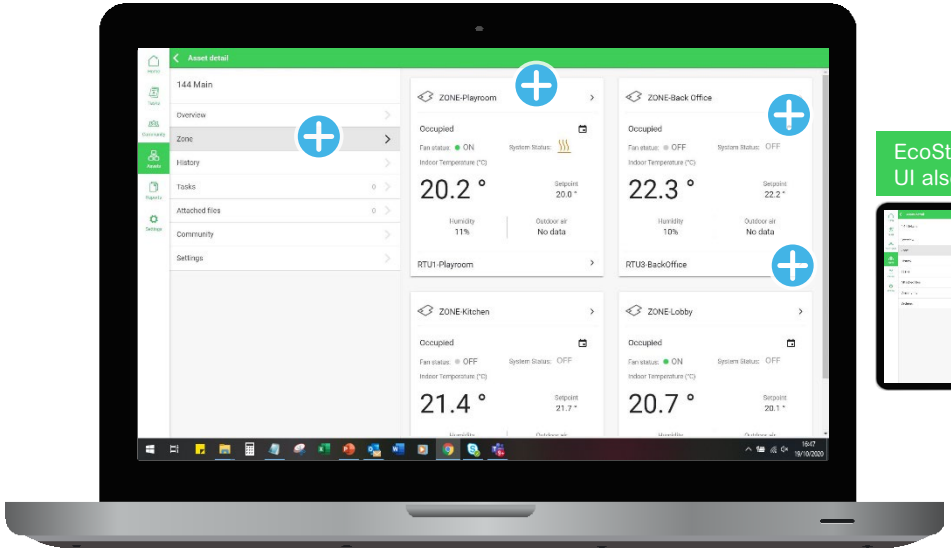
(e.g. RoofTop Unit)

I operate a zone



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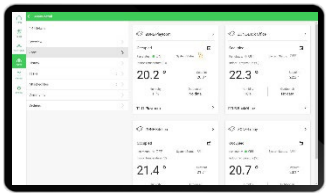

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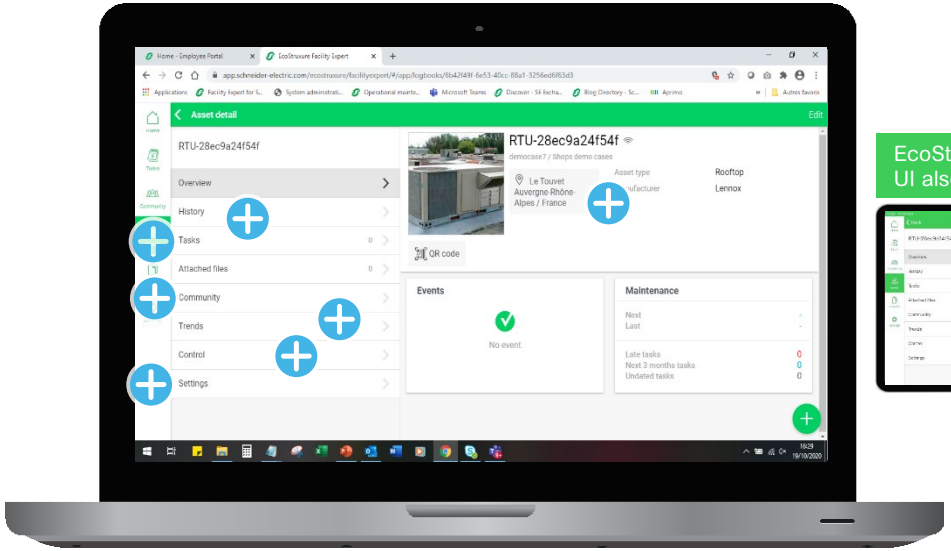
(e.g., RoofTop Unit)

I operate equipment



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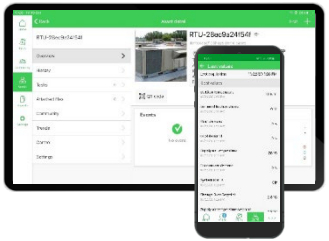

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