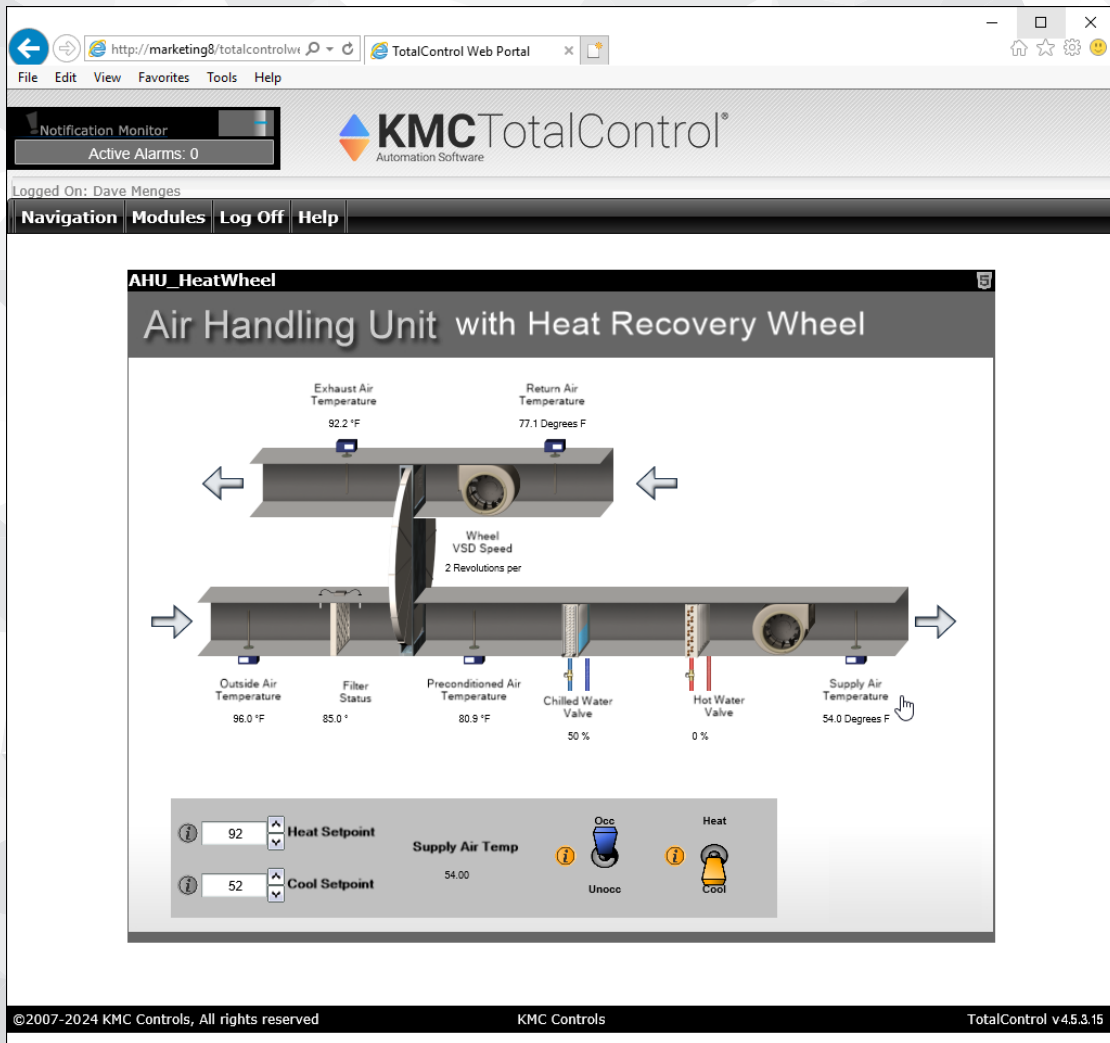


Operator Instructions

For the TotalControl Web Portal



The screenshot displays the KMC TotalControl web portal interface. At the top, the browser address bar shows the URL <http://marketing8/totalcontrolw...> and the page title "TotalControl Web Portal". The navigation menu includes "File", "Edit", "View", "Favorites", "Tools", and "Help". A notification monitor shows "Active Alarms: 0". The user is logged on as "Dave Menges". The main content area displays the "AHU_HeatWheel" control screen, titled "Air Handling Unit with Heat Recovery Wheel".

The AHU_HeatWheel screen shows a schematic of the air handling unit with the following data points:

- Exhaust Air Temperature: 92.2 °F
- Return Air Temperature: 77.1 Degrees F
- Wheel VSD Speed: 2 Revolutions per
- Outside Air Temperature: 96.0 °F
- Filter Status: 85.0 °
- Preconditioned Air Temperature: 80.9 °F
- Chilled Water Valve: 50 %
- Hot Water Valve: 0 %
- Supply Air Temperature: 54.0 Degrees F

Control elements include:

- Heat Setpoint: 92
- Cool Setpoint: 52
- Supply Air Temp: 54.00
- Buttons for "Occ" (Occupied) and "Unocc" (Unoccupied) modes.
- Buttons for "Heat" and "Cool" modes.

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About this manual

This publication is an operator's manual for the TotalControl Web Portal. Review this material in its entirety before using any of the functions in the Web Portal for a TotalControl building automation system.

This manual is the Web Portal operator's instruction manual for a TotalControl managed building automation system. Topics in this manual include the following:

- Logging on to and logging off from of the Web Portal.
- Using the standard Web Portal functions for schedules, trends, alarms, and reports.
- Adding users and making changes to security groups.
- Operating interactive controls on custom graphic pages.

What you need to know

This manual assumes your familiarity with the following:

- Your computer and the Windows operating system.
- Using a browser.
- The principles of the building automation functions that will be managed from the TotalControl Web Portal.

Conventions used

Some of the text in this publication uses special formatting to indicate emphasis or keystrokes. The text conventions are as follows:

Menu and dialog items	Highlights items in the Design Studio interface, including buttons, dialog names, menus, and commands in menus.
<code>File names</code>	Highlights names of files and extensions.
<i>Italics</i>	Indicates a book or section title.
KEY NAMES	Indicates a specific key on the keyboard such as SHIFT or ENTER .

Section 1: Getting started with the TotalControl Web Portal

The TotalControl Web Portal is the tool with which authorized operators manage the daily functions of a building automation system. This section covers getting started with the Web Portal.

The TotalControl Web Portal is a set of browser pages that operators use to view and manage the key functions of a TotalControl managed building automation system. The pages are a combination of standard TotalControl modules and custom pages that represent the actual equipment of the building automation system. Through these pages an operator can do the following:

- View trends logs and system history
- Change schedules
- Acknowledge and view lists of alarms and events
- Create, view, and save reports
- Change user access
- Monitor and control equipment operation

Topics in this section

Browser requirements	8
Optimizing browser settings	8
Log on and off	8
The Web Portal page	9
About kiosks and anonymous access	11

Browser requirements

The TotalControl Web Portal is compatible with the following HTML5 browsers.

- Firefox version 71.0 or later
- Google Chrome version 78.0 or later
- Internet Explorer version 11 or later
- Microsoft Edge Chromium version 80.0 or later

Other browser requirements.

- If Adobe Flash is enabled, Adobe Flash Player version 11 is required. Enabling Flash is a local option and not required to use the Web Portal.
- The recommended monitor resolution is 1280 x 1024 pixels or larger. The minimum recommended resolution is 1024 x 768.
- The Web Portal does not require Java applets or custom ActiveX controls.

Optimizing browser settings

For the most up-to-date information, change the browser settings to update every time the page is visited. The exact method to do this will depend upon the browser.

Log on and off

To log on to the TotalControl Web Portal, you will need the following information supplied by the TotalControl system administrator.

- A user name
- The password assigned to the user name
- The address of the Web Portal. The address may take either of the following forms:
 - The name of a computer
`http://bigbuilding/totalcontrolweb`
 - A Uniform Resource Locator (URL)
`http://tcdemo.kmcccontrols.com`

To log on to the TotalControl Web Portal, do the following:

- 1 Open a browser.
- 2 In the browser address bar, enter the address of your TotalControl Web Portal.

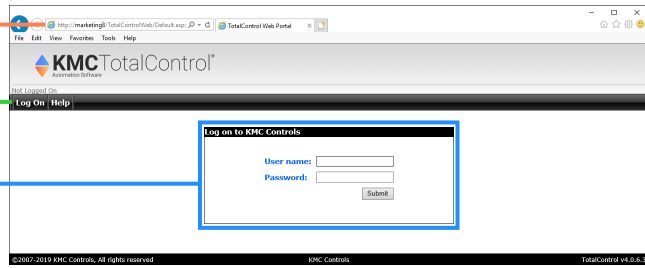
- 3 When the TotalControl Web Portal home page opens, enter your user name and password in the Log On dialog.

Illustration 1–1 Web Portal home page

Enter an address in the address bar.

Click Log On to clear the Log On dialog.

Enter your user name and password.



When you are finished using the Web Portal, click **Log Off** to close the session. This frees the portal for other users.

If you leave the computer idle and do not use the Web Portal for longer than a preset period, you will automatically be logged off. The period is set by the TotalControl system administrator.

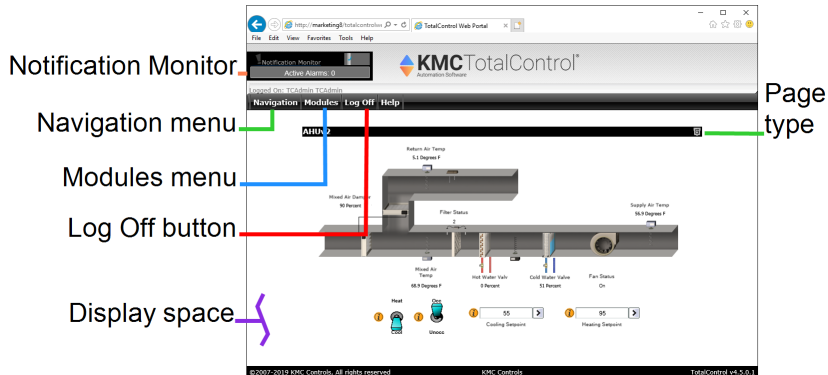
The Web Portal page

The Web Portal is a combination of standard TotalControl modules and custom pages. The key elements of the Web Portal page are:

- The Notification Monitor for alarms
- The Navigation menu to open custom graphic pages
- The Modules menu to open standard TotalControl viewers for alarms, trends, schedules, reports, user management, and security.
- The Log On/Log Off button.
- The display space contains one of the modules or a custom graphic page.

Logging on and logging off are explained in the topic [Log on and off on page 8](#). The other functions are explained in topics and sections that follow.

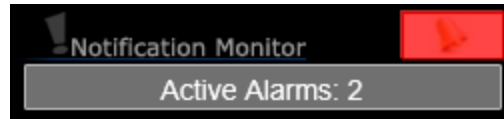
Illustration 1–2 Typical custom graphics page



Notification Monitor

The Notification monitor is a visual alert that TotalControl has received an alarm or event that has not been acknowledged by an operator. Clicking the bottom of the Notification Monitor opens the Alarm Viewer page. See [Displaying, acknowledging, and archiving alarms on page 23](#) for details on alarm viewing and management.

Illustration 1–3 Active alarm in the Notification Monitor

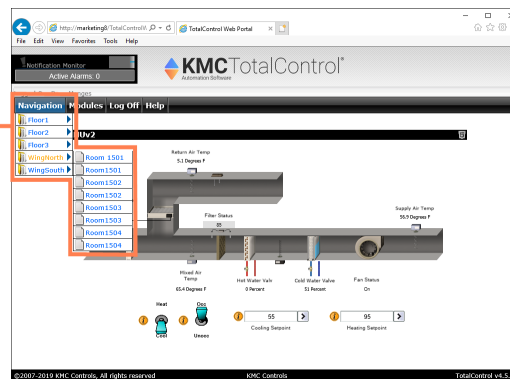


Navigation menu

The Navigation menu is a list of links to custom pages created specifically for the building automation system. The exact details of the equipment represented on each page will be provided by the TotalControl system administrator. See [Custom web pages on page 63](#) for the details on the various parts of the custom pages.

Illustration 1–4 Navigation menus

Navigation menu
to graphic pages



Modules menu

The commands in the Modules menu are a set of standard TotalControl features for viewing the system status, changing a schedule, or managing user access. Each of the modules is explained in detail in the following sections.

- Open the Trend Viewer to view graphs of system performance. See [Using the Trend Viewer module on page 13](#).
- Manage the placement of trend logs, groups, and categories. See [Configuring trend logs in the Web Portal on page 19](#).
- The Alarm Viewer displays alarms and events in a list. See [Displaying, acknowledging, and archiving alarms on page 23](#).
- Either of two modules can manage the automatic operation of equipment. See [The Schedule Viewer module on page 29](#) and [The Schedule Manager module on page 37](#).
- Use the All Point and Audit Report viewers to create, view and export reports [TotalControl reports on page 49](#).
- Add or delete users and change other security items with the Web Administrator module. See [Managing security in the Web Portal on page 57](#).

About kiosks and anonymous access

A kiosk display or an anonymous access mode is a limited configuration of the Web Portal. Both configurations are set up by the TotalControl system administrator.

Kiosk displays A kiosk is a specially designated computer that will automatically display only selected graphic pages from the Web Portal.

- A kiosk designation cannot be changed through the Web Portal.
- Operators cannot log on to the Web Portal from a computer designated as a kiosk.
- To start a kiosk display, enter the address of the Web Portal in the browser address bar of the browser running on the kiosk computer. See [Log on and off on page 8](#).

Anonymous access Anonymous Access mode is a method for Web Portal access without logging on. Instead of starting at the Web Portal log on page, users start navigation at a browser home page that represents the physical location of the computer running the browser. Navigation uses only navigation buttons because the Navigation and Modules menus are not available.

Section 2: Using the Trend Viewer module

Topics in this section cover various methods by which you can view trend logs. They cover also exporting trend log data to standard file formats.

Operational data collected as trend logs can be viewed through the Web Portal for a TotalControl managed site. Through the Web Portal, trend data can be exported and formatted into reports.

Viewing trend logs in the Web Portal

Use the Trend Viewer module in the Web Portal to view TotalControl trend logs.

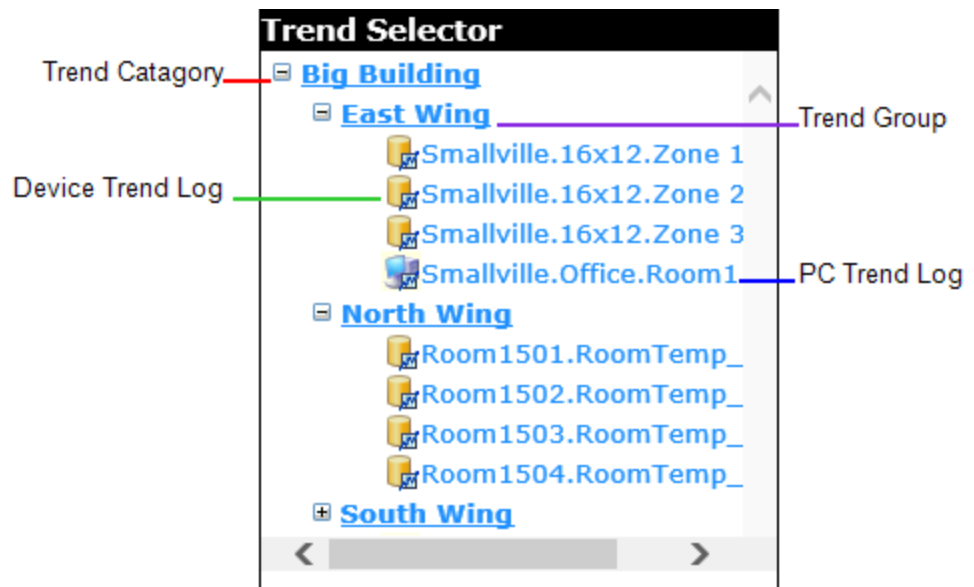
Illustration 2–1 Chart view of the Trend Viewer module



To view trend logs in the Web Portal, do the following:

- 1 Log on to the TotalControl site.
- 2 From **Modules**, choose **Trend Viewer**.

- 3 In the **Trend Selector** list, do one of the following to view a trend chart:
- Select a Trend Group to see all of the trend logs in the group.
 - To see an individual trend log, expand a Trend Group and then select an individual Device Trend Log¹ or PC Trend Log².
 - Select a trend group.



- 4 Change the settings in the **Trend Viewer Controls** area to change the view of the chart.

Smoothing the chart with the auto filter option

Use the trend viewer auto filter to improve the appearance of a chart generated from data collected at regular intervals from analog objects or points.

When **Use Auto Filter** is selected, an average of the trend data is used to generate the chart.

- 1 The trend viewer module divides the selected period of the chart into 500 equal time intervals.
- 2 An average value is calculated for each of the 500 time intervals.

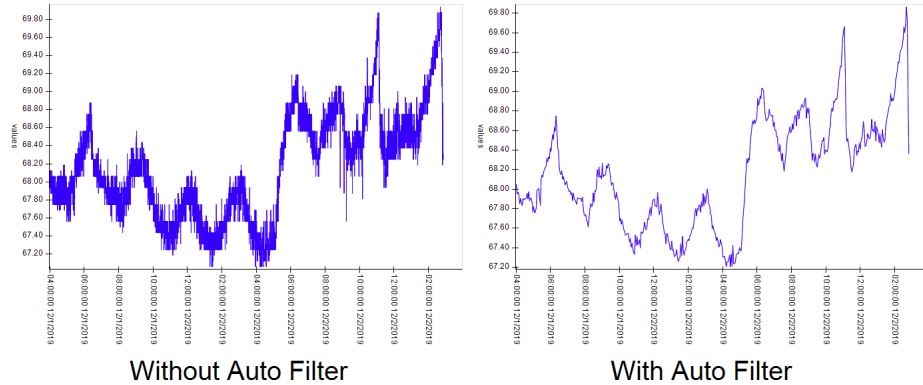
¹A Device Trend Log is a controller trend log that has been retrieved from a device and then stored in the site database.

²A PC Trend Log is a polling process that is performed by a trend service. At regular intervals, the value of a property or point is sampled by the trend service and then stored in the site database.

3 The average value is then plotted for each of the 500 time intervals.

When **Use Auto Filter** is not selected, all of the records are used to generate the chart. For example, if there are 100,000 records, all 100,000 records are used to generate a graph.

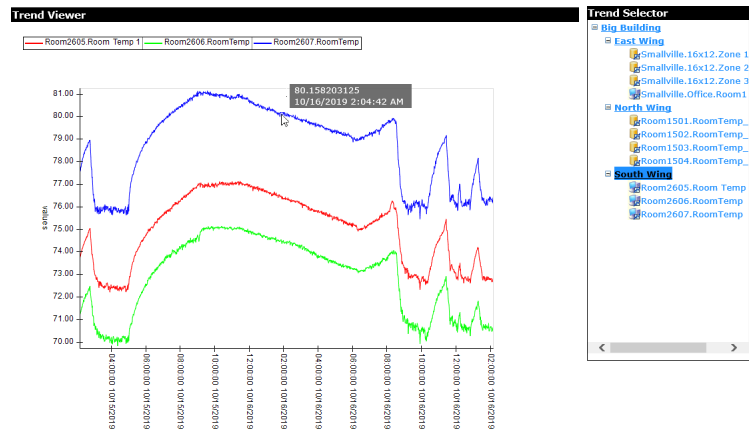
Illustration 2–2 Smoothing with Auto Filter



Viewing trend details

Hover over a point on a graph to view the value and time of data collection.

Illustration 2–3 Viewing trend details with the pointer



Related topics

- [Exporting trend log data on page 15](#)
- [Generating a trend report on page 16](#)

Exporting trend log data

Export trend log data from the Trend View Controls in the Trend Viewer module of the Web Portal.

- Data is exported to a .CSV file of comma separated values.
- Each data value is exported with a time stamp.
- All data for the selected group or individual log is exported.

To export trend log data, do the following:

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Trend Viewer**.
- 3 From the **Trend Selector**, choose a trend group or an individual trend log to export.
- 4 In **Trend Viewer Controls**, click **Export to CSV**. The choices for saving or viewing the data will depend on the browser and the browser settings.

Generating a trend report

A trend report is a list of the data generated from either a trend group or an individual trend log.

- The report organizes and displays trend data in blocks of time over a specified time span.
- Within each block of time the data values—but not the time stamps associated with the values—are listed in the report.
- Any single trend report is limited to 64,000 records.

Illustration 2–4 A typical trend report

Notification Monitor
Active Alarms: 0

Logged On: TCAAdmin TCAAdmin

Navigation Modules Log Off Help

Report Filter

Set Report Dates
Start Date: 10/15/2019 2:38:08 PM End Date: 10/16/2019 2:38:00 PM

Set Report Time Interval
00:15 (hh:mm)

Select Trend or Trend Group
Trends: Room1501.RoomTemp_Tren View Report Trend Groups: North Wing View Report

Trend Report

1 of 11 100% Find | Next

Trend Report

Start: 10/15/2019 2:38:08 PM
End: 10/16/2019 2:23:08 PM

TimeStamp	Room1501.Roo	Room1502.Roo	Room1503.Roo	Room1504.Roo
10/15/2019 2:38:08 PM	75.2	73.82	77.92	75.42
	75.23	73.85	77.93	75.43
	75.27	73.88	78	75.46
	75.29	73.92	77.99	75.47
	75.35	73.98	78.06	75.53

Viewing a trend report

- 1 Log on to the TotalControl Web Portal.
- 2 Choose **Trend Viewer** from **Modules**.
- 3 In **Trend Viewer Controls**, click **View Trend Report**.
- 4 Under **Set Report Dates**, set the time span for the report with **Start Date** and **End Date**.

- 5 Under **Set Report Time Interval**, set the time interval for the report data.
- 6 Under **Select Trend or Trend Group**, do one of the following:
 - Select an individual trend log from **Trends**.
 - Select all of the trend logs in a group from **Trend Groups**.
- 7 Click either **View Report** button.
 - The Trends button lists data for the single selected trend log.
 - The Trend Groups button lists data for all of the trend logs in that group.

Saving a trend report

- 1 Generate a trend report for viewing.
- 2 On the Trend Report toolbar, click the Save icon.
- 3 Choose a format for the report. See the table [Trend report file formats on page 17](#).

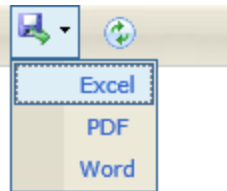


Table 2–1 Trend report file formats

Format	Description	File name extension
Acrobat	Adobe Acrobat file	.pdf
Excel	Microsoft Excel spreadsheet file	.xlsx
Word	Microsoft Word file	.docx

Search for specific data in a report

- 1 Generate a trend report for viewing.
- 2 On the Trend Report toolbar, enter text for the search item in the text box next to **Find**.



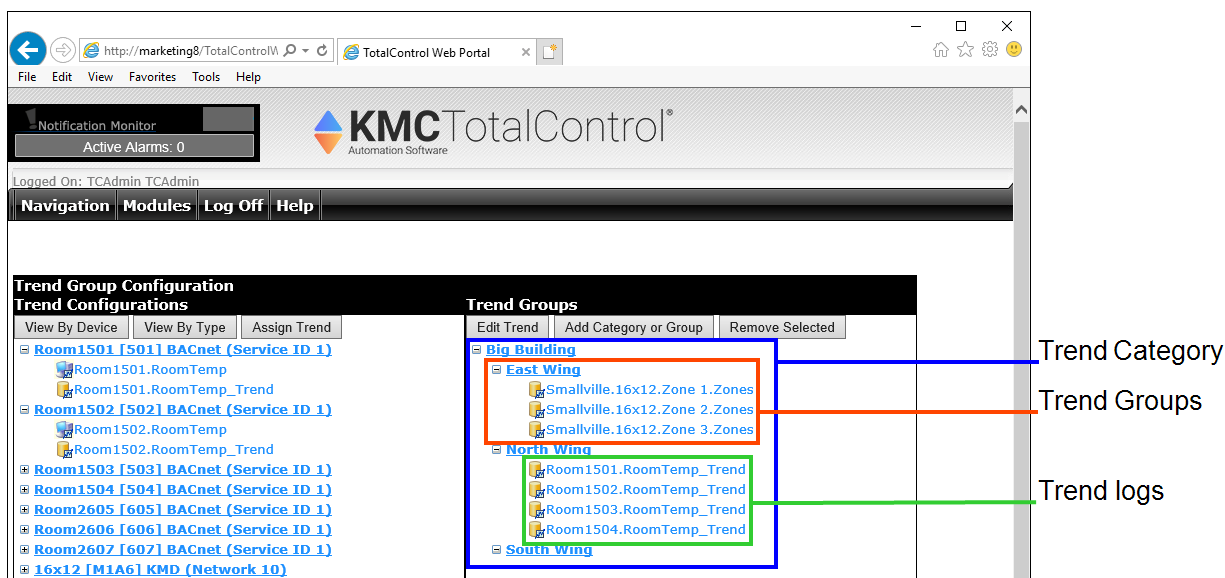
- 3 Click **Find**.
- 4 Click **Next** to find the next occurrence of the search item.

Section 3: Configuring trend logs in the Web Portal

Trend categories and groups can be configured in the Web Portal. Topics in this section cover the configuration procedures for trends in the Web Portal.

Trend logs are placed in a Trend Group before they are viewable in the Web Portal. The Trend Group must also be placed in a Trend Category.

Illustration 3–1 Trend Categories, Groups, and logs



Adding trend logs to a Trend Group

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Trend Configuration**.
- 3 Expand the list under **Trend Configurations** to locate and select the trend log.
- 4 Under **Trend Groups**, select the group in which you want to place the trend.
- 5 Click **Assign Trend**.

- 6 When **Add Trend To Group** opens at the top of the page, make any required changes to the display parameters.
 - Select the **Use Custom Y Axis** check box to modify the vertical axis in the trend viewer module.
 - Select a color in **Trend Color**.
 - If **Use Custom Y Axis** is selected, enter a minimum and maximum value for the Y axis.
 - In **Y Title**, enter a name to display in the Web Portal.
- 7 Click **Assign Trend** when finished.

Delete a category, group or trend log

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Trend Configuration**.
- 3 Expand the list under **Trend Groups** to locate and select the category, group, or trend for deletion.
- 4 Click **Remove Selected**.

Add a trend category

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Trend Configuration**.
- 3 Click on any area under **Trend Groups** to clear any selection of groups or categories.
- 4 Click **Add Category or Group**.
- 5 When **Add Category** opens at the top of the page, enter the name for the new category.
- 6 Click **Submit** when finished.

Add a Trend Group

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Trend Configuration**.
- 3 Expand the list under **Trend Groups** to locate the category in which you want to place the new group.
- 4 Select the category.
- 5 Under **Trend Groups**, click **Add Category or Group**.
- 6 When **Add Group** opens at the top of the page, enter the name for the new group.
- 7 Click **Submit** when finished.

Edit a trend

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Trend Configuration**.
- 3 Expand the list under **Trend Groups** to locate and select the trend log.
- 4 Click **Edit Trend**.
- 5 When **Add Trend To Group** opens at the top of the page, make any required changes to the display parameters.
 - Select the **Use Custom Y Axis** check box to modify the vertical axis in the trend viewer module.
 - If **Use Custom Y Axis** is selected, enter a minimum and maximum value for the Y axis.
 - Select a color in **Trend Color**.
 - In **Y Title**, enter a name to display in the Web Portal.
- 6 Click **Update Trend** when finished.

Section 4: Displaying, acknowledging, and archiving alarms

Topics in this section describe how to view, acknowledge and archive notifications within the TotalControl Web Portal.

Notifications from controllers in a TotalControl managed site are displayed as either alarms or events. Both can be viewed, acknowledged and cleared through the Web Portal.

Topics in this section

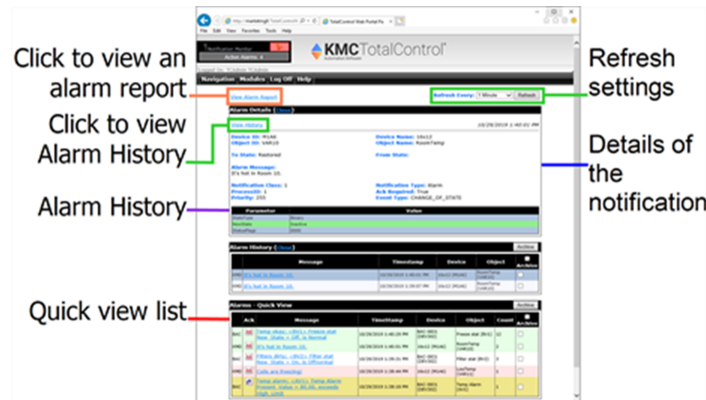
- Viewing alarms from the Web Portal 23
- Generating an alarm report 24
- Clearing notifications from the Web Portal 26
- Archiving notifications from a browser 26

Viewing alarms from the Web Portal

To view alarms or events in the Web Portal with an Internet browser, do the following:

- 1 Log on to the TotalControl Web Portal.
- 2 Choose **Alarm Viewer** from **Modules**.

Illustration 4–1 Web Portal Alarm Viewer



Quick View The Quick View list is a list of the most recent notifications from points and objects. The status is shown in the Ack column. The background color of each row indicates the type of notification.

- Red—Notification of an alarm condition in a BACnet or KMD controller.
- Green—Notification that an alarm condition in a BACnet or KMD controller has returned to normal.
- Yellow—Alarms that do not require acknowledgment.
- White—Notification of a BACnet event.

Alarm Details An expanded view of the details of the notification. To display the alarm details, click the link in the message column of either the Quick View list or the Alarm History list.

Alarm History A list of all notifications for the point or object selected from the **Quick View** list. Open the Alarm History list by clicking **View History** in **Alarm Details**.

Refresh settingsTotalControl periodically refreshes the data in the browser with data from the building services database.

- Click **Refresh** to immediately refresh the data on the screen with the data from the database.
- Choose a value from **Refresh Every** list to set the automatic refresh rate.

Generating an alarm report

An alarm report is a formatted list of notification data stored by a TotalControl managed site.



- The report organizes and displays notification data over a specified time span.
- Any single alarm report is limited to 64,000 records.
- Alarms are designated with an alarm icon .
- Events are designated with the event icon .

Illustration 4–2 Alarm report in the Web Portal

The screenshot shows a web browser window with the URL <http://marketing8/TotalControl>. The page title is "TotalControl Web Portal". Below the navigation bar, there is a "Report Filter" section with "Start Date: 3/4/2020 12:00 AM" and "End Date: 3/11/2020 10:44 AM". A "View Report" button is visible.

The main content area is titled "Alarm Report" and shows a table of notifications for the site "Goddard". The report is filtered for the period from 3/4/2020 12:00 AM to 3/11/2020 10:44 AM. The table has the following columns: Ack, Ack Req#, To State, Message, Timestamp, Device Instance (Name), and Object Name (Mnemonic). The report lists several "Freeze stat" alarms and "Temp alarm" events.

Ack	Ack Req#	To State	Message	Timestamp	Device Instance (Name)	Object Name (Mnemonic)
		Off Normal	Freeze stat alarm: <BV1> Freeze stat New_State = On, is Offnormal	3/4/2020 11:33:46 AM	BAC-5831 (DEV302)	Freeze stat (BV1)
		Off Normal	Freeze stat alarm: <BV1> Freeze stat New_State = On, is Offnormal	3/4/2020 11:33:46 AM	BAC-5831 (DEV302)	Freeze stat (BV1)
		Normal	Temp okay: <BV1> Freeze stat New_State = Off, is Normal	3/4/2020 11:33:47 AM	BAC-5831 (DEV302)	Freeze stat (BV1)
		Normal	Temp okay: <BV1> Freeze stat New_State = Off, is Normal	3/4/2020 11:33:47 AM	BAC-5831 (DEV302)	Freeze stat (BV1)
		Off Normal	Freeze stat alarm: <BV1> Freeze stat New_State = On, is Offnormal	3/11/2020 9:43:36 AM	BAC-5831 (DEV302)	Freeze stat (BV1)
		Off Normal	Freeze stat alarm: <BV1> Freeze stat New_State = On, is Offnormal	3/11/2020 9:43:36 AM	BAC-5831 (DEV302)	Freeze stat (BV1)
		High Limit	Temp alarm: <AV1> Temp Alarm Present_Value = 88.00, exceeds High_Limit	3/11/2020 9:43:42 AM	BAC-5831 (DEV302)	Temp Alarm (AV1)
		Alarm	SSD1UAS/VAR11 Coils are freezing!	3/11/2020 10:44:17 AM	(M1A6)	(VAR11)
		Alarm	SSD1UAS/VAR10 It's hot in Room 10	3/11/2020 10:44:17 AM	16x12 (M1A6)	LowTemp (VAR11)
		Alarm	SSD1UAS/VAR10 It's hot in Room 10	3/11/2020 10:44:19 AM	(M1A6)	(VAR10)
		Alarm	SSD1UAS/VAR10 It's hot in Room 10	3/11/2020 10:44:19 AM	16x12 (M1A6)	RoomTemp (VAR10)

Legend: Alarm Event

Creating an alarm report

- 1 Log on to the TotalControl Web Portal.
- 2 Choose **Alarm Viewer** from **Modules**.
- 3 Click **View Alarm Report**.
- 4 In **Start Date** and **End Date**, set the time span for the report.
- 5 Click **View Report**.

Saving alarm reports

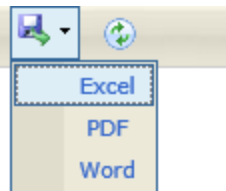
Alarm reports may be saved in the following formats:

Table 4–1 Alarm report file formats

Format	Description	File name extension
Acrobat	An Adobe Acrobat file	.pdf
Excel	A Microsoft Excel spreadsheet file	.xls
Word	A Microsoft Word file	.docx

To save an alarm report, do the following:

- 1 Generate an alarm report for viewing.
- 2 In the Alarm Report toolbar, choose the Save icon.



- 3 Choose a format for the report. See the table [Alarm report file formats on page 25](#).
- 4 Once you choose a format, the choices for saving or viewing the data will depend on the browser and the browser settings.

Searching for specific data in a report

- 1 In the text box next to **Find**, enter text that is unique to the search item.
- 2 Click **Find**.
- 3 Click **Next** to find the next occurrence of the item.

Clearing notifications from the Web Portal







An acknowledgment icon is an indication that a notification must be acknowledged by an operator. Click the  icon to acknowledge the alarm. The icon will change to the acknowledged icon . If present, the audible alarm sound will continue until the alarm is archived.

Table 4–2 Acknowledgment status icons

Icon	Description
	A notification in the database is waiting for an acknowledgment from an operator.
	A notification that does not require an operator acknowledgment.
	TotalControl is updating the status.
	An operator has acknowledged the notification.

Archiving notifications from a browser

Alarms and events will remain in the Quick View list until they are archived. Archiving alarms and events removes them from the Alarms Quick View list, but they remain in the alarm report.

- 1 In the Alarm Viewer, select notifications for archiving by doing either of the following:
 - Select the check box in each alarm row.
 - Select the Archive check box to select all alarms in the list for archiving.
- 2 Click **Archive**. All alarms and events with selected check boxes will be archived and removed from the list.

Illustration 4-3 Alarm button and check boxes

The screenshot shows the KMC TotalControl web portal interface. At the top, there's a navigation bar with 'Navigation', 'Modules', 'Log Off', and 'Help'. Below that, a 'Notification Monitor' section shows 'Active Alarms: 4'. The main content area is divided into three sections:

- Alarm Details (Close):** Shows information for a specific alarm on 10/29/2019 at 1:40:01 PM. It includes fields for Device ID (M1A6), Object ID (VAR10), To State (Restored), Alarm Message (It's hot in Room 10.), Notification Class (1), Process ID (1), Priority (255), Device Name (16x12), Object Name (RoomTemp), From State, Notification Type (Alarm), Ack Required (True), and Event Type (CHANGE_OF_STATE). A table below lists parameters: StateType (Binary), NewState (Inactive), and StatusFlags (0000).
- Alarm History (Close):** A table with columns: Message, Timestamp, Device, Object, and Archive. It shows two entries for the message 'It's hot in Room 10.' with timestamps 1:40:01 PM and 1:39:07 PM. An 'Archive' button is located to the right of the table header.
- Alarms - Quick View:** A summary table with columns: Ack, Message, TimeStamp, Device, Object, Count, and Archive. It lists several active alarms with their respective messages, devices, objects, and counts. An 'Archive' button is also present to the right of the table header.

Annotations in the image point to the 'Archive' button in the Alarm History section and the 'Archive' check boxes in the Alarms - Quick View section.

Archive button

Archive check boxes

Section 5: The Schedule Viewer module

Schedules in a TotalControl site are managed from the Web Portal. Topics in this section cover changing schedules on both BACnet and KMD networks using the Schedule Viewer module.

Schedules are a convenient method for scheduling recurring events such as security lighting or building occupancy settings. The Schedule Viewer is the Web Portal operators tool for viewing and editing schedules. The Schedule Manager is an alternative to the Schedule Viewer and is explained in the section [The Schedule Manager module on page 37](#).

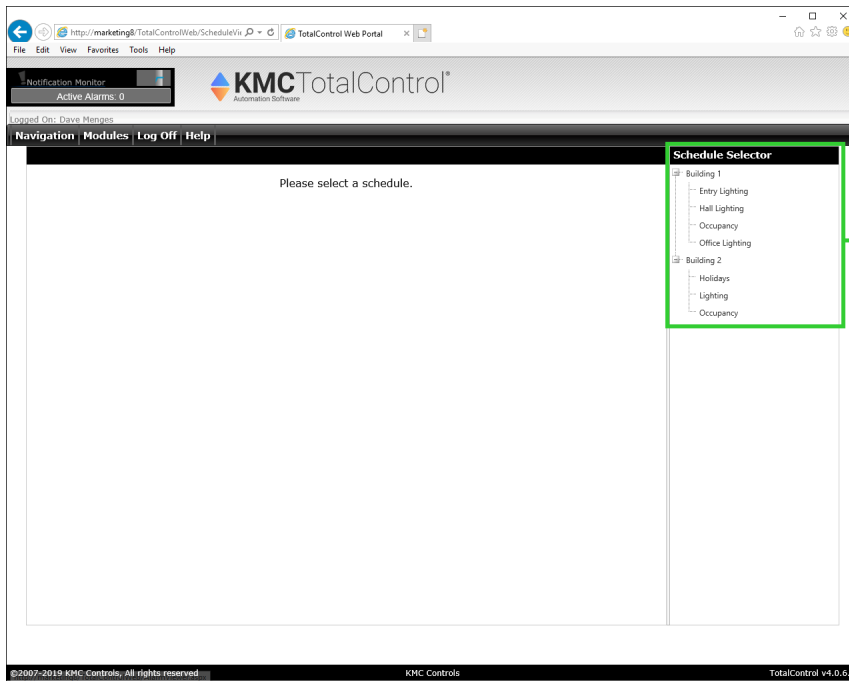
Topics in this section

Selecting a schedule from the Schedule Viewer module	29
Editing BACnet schedules	30
Editing KMD schedules	33

Selecting a schedule from the Schedule Viewer module

Schedules from both KMD and BACnet controllers can be changed through the Web Portal Schedule Selector in the Schedule Viewer module.

Illustration 5-1 Web Portal Schedule Selector

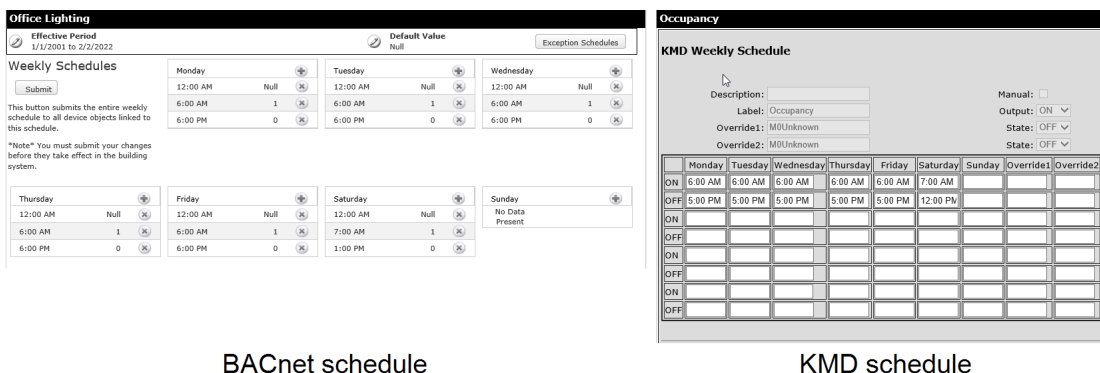


Select schedules from the schedule categories and groups.

To select a schedule for editing, do the following:

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Schedule Viewer**.
- 3 Click **+** to expand or **-** to collapse the group schedule list to reveal the schedules under a category.
- 4 Click the schedule name. The page changes to the schedule view. The exact view will depend upon the protocol of the schedule.
 - If a BACnet schedule opens, see [Editing BACnet schedules on page 30](#).
 - If a KMD schedule opens see [Editing KMD schedules on page 33](#).

Illustration 5–2 BACnet and KMD schedules



Editing BACnet schedules

The following topics cover changing a schedule in a BACnet controller.

- [Adding and changing times and values in BACnet schedules on page 30](#)
- [Changing the effective period and default value on page 31](#)
- [Changing exception schedules on page 32](#)

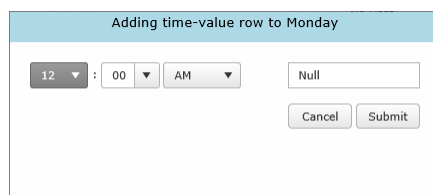
Adding and changing times and values in BACnet schedules

The daily times and values in a BACnet weekly schedule are edited in the Time-Value dialog.

Illustration 5–3 Daily time/value pairs in a Weekly Schedule



Illustration 5–4 Time-Value dialog



To add a Time-Value row to a daily schedule

- 1 In a weekly schedule page click the add to web icon at the top of a daily schedule. The **Time-Value Row** dialog opens.
- 2 Make changes to the Time/Value pair.
- 3 Click **Submit** when finished or **Cancel** to leave the row unchanged.
- 4 Click **Submit** in the Weekly Schedule view to save the changes in the controllers.

To delete a row

- 1 Select the row.
- 2 Click the delete icon at the end of a time/value row.
- 3 Click **Submit** in the Weekly Schedule view to save the changes in the controllers.

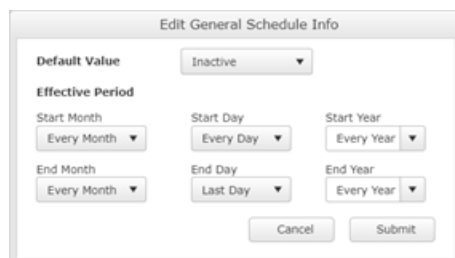
To change the schedule

- 1 Click **Submit** when finished or **Cancel** to leave the row unchanged.
- 2 Click **Submit** in the Weekly Schedule view to save the changes in the controllers.
- 3 Make changes to the Time/Value pair.
- 4 Double-click on the row to change.

Changing the effective period and default value

Use the **Edit General Schedule Info** dialog to change the effective period or default value of the schedule.


Illustration 5–5 General Schedule Information dialog



Default Value Each day in a weekly schedule covers a 24-hour period. The **Default Value** defines the state of the schedule between 12:00 A.M. (midnight) and the first time/value pair in a daily schedule list. The present value of the schedule remains at the value of the last time/value pair until 12:00 A.M.

Effective Period Set the effective period of the schedule with **Start Time** and **End Time**.

To change the general information:





- 1 In a Weekly Schedule view, click the  icon next to **Effective Period** or **Default Value**. The **Edit General Schedule Info** dialog opens.
- 2 Make the changes.
- 3 Click **Submit** when finished or **Cancel** to leave the information unchanged.
- 4 Click **Submit** in the Weekly Schedule view to save the changes in the controllers.

Changing exception schedules

Use an exception schedule to override the values in a BACnet weekly schedule. Exception schedules are selected or added from the Exception Summary list.

To open the summary list from a weekly schedule page, click .


Illustration 5–6 Exception Summary list

Exception Summary		
1	11/28/" to 11/30/"	
2	12/23/" to 12/25/"	
3	12/30/2019 to 1/1/2020	


To change an exception schedule

- 1 From the Exception Summary page, double-click an exception schedule to choose an exception schedule from the list.
- 2 Make changes and then do one of the following:
 - Click **Submit** when finished.
 - Click **Weekly Schedules** to leave the information in the list unchanged.
- 3 Click **Submit** in the Weekly Schedule view to save the changes in the controllers.

To add an exception schedule

- 1 From the Exception Summary page, click the add icon  to open the **Web Exception Schedule** dialog.
- 2 Enter the priority and effective times and dates.
- 3 Make changes and then do one of the following:
 - Click **Submit** when finished.
 - Click **Weekly Schedules** to leave the information in the list unchanged.
- 4 Click **Submit** in the Weekly Schedule view to save the changes in the controllers.

To delete an exception schedule

- 1 From the Exception Summary page, click the delete  next to the schedule to be deleted.
- 2 Make changes and then do one of the following:
 - Click **Submit** when finished.
 - Click **Weekly Schedules** to leave the information in the list unchanged.
- 3 Click **Submit** in the Weekly Schedule view to save the changes in the controllers.

The **Exception Schedule** dialog includes the following choices for setting dates.

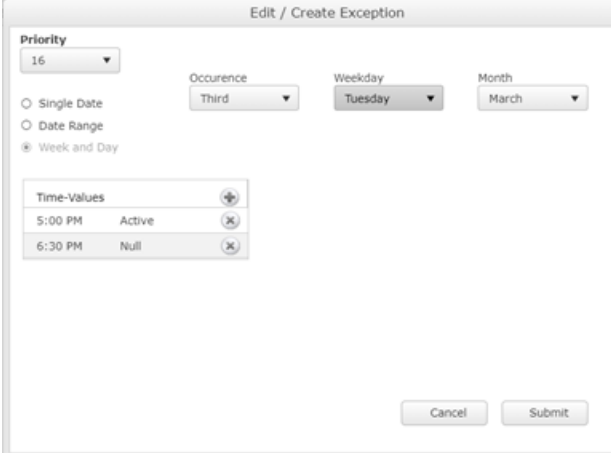
Single Date A single date on which the values and times listed in the exception schedule will override the values of the weekly schedule.

Date Range A range of dates on which the values and times listed in the exception schedule will override the values of the weekly schedule.

Week and Day A day of the week and month on which the values and times listed in the exception schedule will override the values of the weekly schedule.

Priority Sets the order of precedence for conflicting exception schedules. For example, if **Exception Schedule 2** has an event priority 8 and **Exception Schedule 4** has an event priority of 10, then **Exception Schedule 2** will override **Exception Schedule 4** when there is a conflict in the values for the reference object.



Time-Values The method for entering time/value pairs in an exception schedule is the same method used in a weekly schedule.

Illustration 5–7 Web Exception Schedule dialog


Priority: 16

Occurrence: Third Weekday: Tuesday Month: March

Single Date
 Date Range
 Week and Day

Time-Values		
5:00 PM	Active	
6:30 PM	Null	

Cancel Submit

Editing KMD schedules

The following topics cover changing KMD schedules from the Web Portal.

- Changing [Weekly schedules on page 34](#).
- Changing [Annual schedules on page 36](#).

To edit a KMD schedule, do the following:



- 1 Log on to the TotalControl web site.
- 2 From **Modules**, choose **Schedule Viewer**.
- 3 Click  to expand or  to collapse the Schedule Selector list to reveal the schedules under a category.
- 4 Click the schedule name. The page changes to the weekly schedule view.

Illustration 5–8 KMD weekly schedule in Schedule Viewer

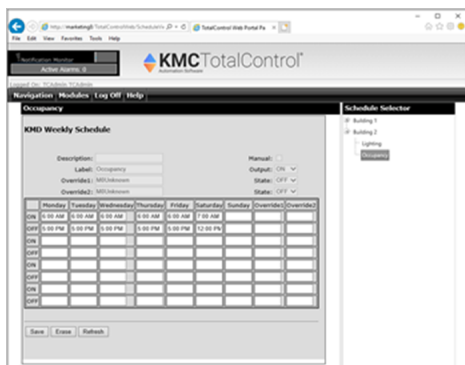
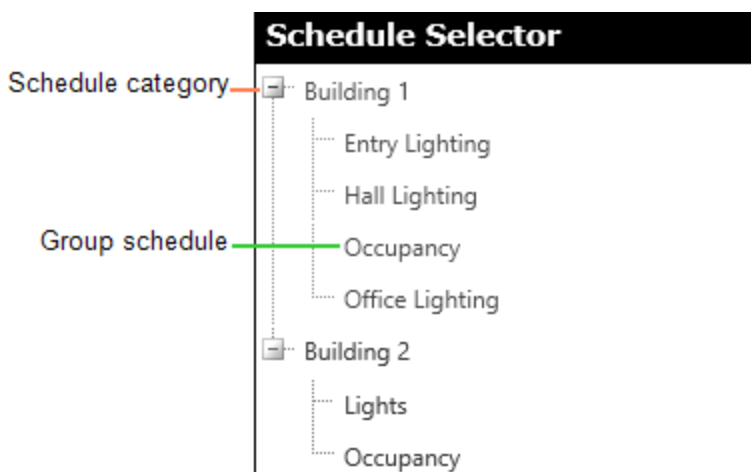


Illustration 5–9 Group schedules shown in the Schedule Selector list



Weekly schedules

Weekly schedules control recurring daily events. Authorized operators can change the master weekly schedule in the Web Portal.

Illustration 5–10 KMD weekly schedule in Web Portal

Occupancy

KMD Weekly Schedule

Description:

Label:

Override1:

Override2:

Manual:

Output:

State:

State:

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Override1	Override2
ON	6:00 AM	6:00 AM	6:00 AM	6:00 AM	6:00 AM	7:00 AM			
OFF	5:00 PM	5:00 PM	5:00 PM	5:00 PM	5:00 PM	12:00 PM			
ON									
OFF									
ON									
OFF									
ON									
OFF									

Note: Only the time values under Monday-Sunday, Override1, and Override2 can be changed from the Web Portal. All other values are for information only.

Rules for entering weekly schedules.

- Times are entered in in an *hour:minute* format. Use either the 12-hour or 24-hour clock format. When using the 12-hour clock, add either **AM** or **PM** to the end of the value.
- Times are displayed in 12-hour clock format.
- When more than one *ON* and *OFF* time is entered per day, times must be entered in ascending order.
- Enter 00:01 (1 minute after midnight) to designate midnight.
- Do not leave empty days. If the *ON* or *OFF* state is to continue from a previous day, enter 00:01 in the first *ON* or *OFF* row for that day.
- Override 1 and Override 2 schedule times are used when the value of Override 1 or Override 2 becomes *TRUE(1)* or *ON*.

To change a weekly schedule in a KMD controller, do the following:

- 1 Locate and open the schedule in the Schedule Selector list.
- 2 Make the changes observing the following rules.
 - To clear the schedule, click **Erase**.
 - To reload the schedule from the controller, click **Refresh**.
- 3 When changes are complete, click **Save**.

Section 6: The Schedule Manager module

Schedules in a TotalControl site are managed from the Web Portal. Topics in this section cover changing schedules on both BACnet and KMD networks using the Schedule Manager module.

Schedules are a convenient method for scheduling regularly occurring events such as turning on security lights or changing building occupancy settings. TotalControl also includes PC-based schedules for controlling settings for special events. The Schedule Manager module is one of the tools a Web Portal operator can use for viewing and editing schedules. The Schedule Viewer is an alternative to the Schedule Manager and is explained in the topic [The Schedule Viewer module on page 29](#).

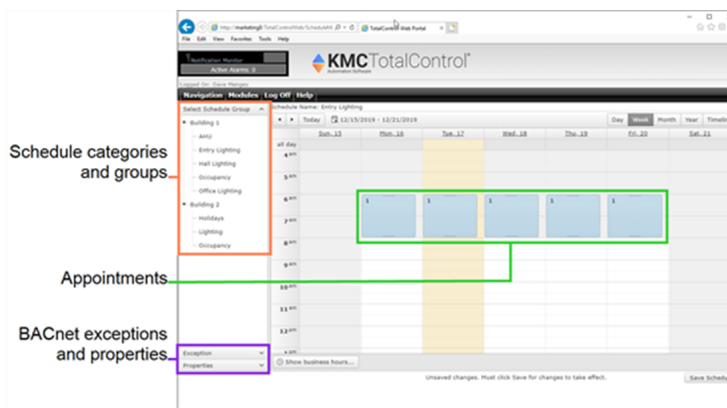
Topics in this section

- Selecting a schedule 37
- Changing the view 38
- Adding and changing appointments 39
- KMD schedules 41
- BACnet schedules 43
- Editing PC-based schedules in a browser 47

Selecting a schedule

The schedules in both KMD and BACnet controllers can be changed through the Web Portal Schedule Selector.

Illustration 6–1 Web Portal Schedule Manager



To select a schedule for editing, do the following:

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Schedule Manager**.

- 3 Under **Select Schedule Group**, expand or collapse the list of groups to reveal the schedule.
- 4 Click the schedule name. The page changes to the schedule view.

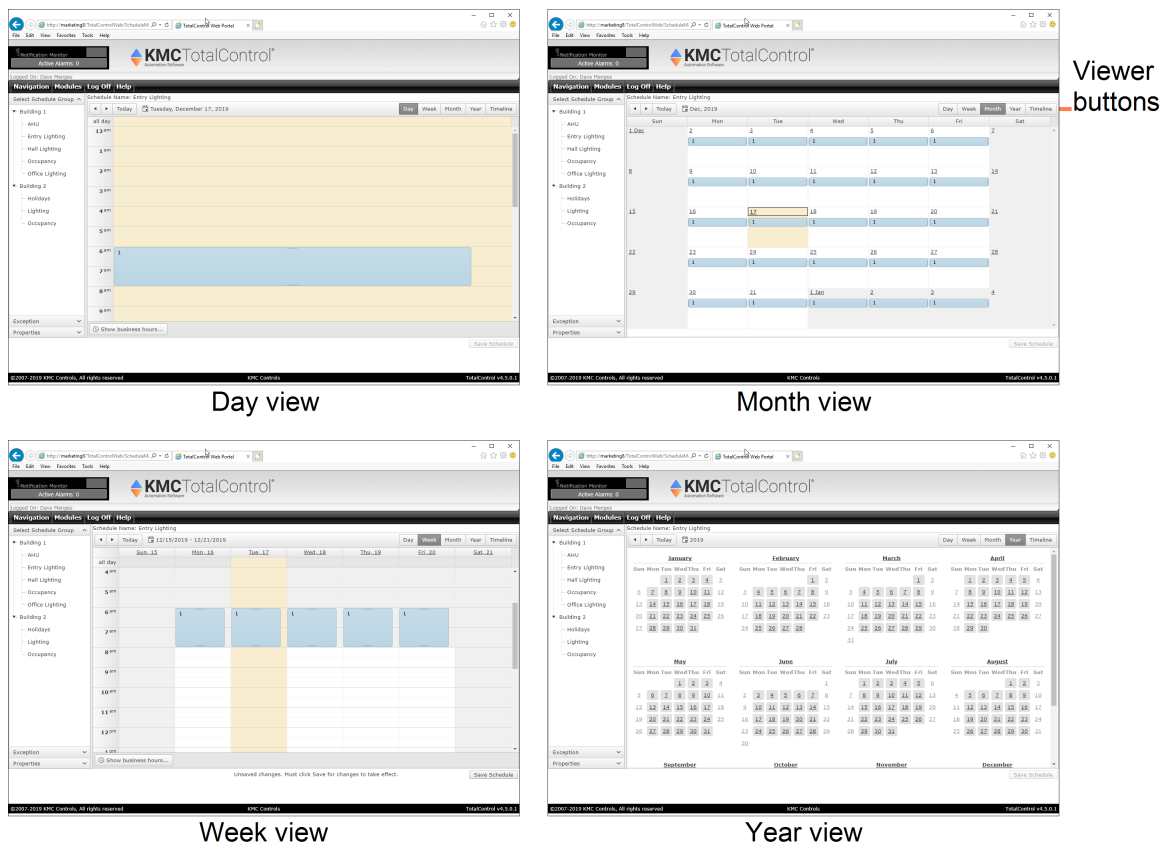
Related topics

- [Changing the view on page 38](#)
- [Adding and changing appointments on page 39](#)
- [BACnet schedules on page 43](#)
- [KMD schedules on page 41](#)

Changing the view

Appointments can be added or changed from a daily, weekly, monthly or time line view. To change the schedule to one of the views shown in the illustration *Schedule Manager views*, click a viewer button at the top of the schedule

Illustration 6–2 Schedule Manager views



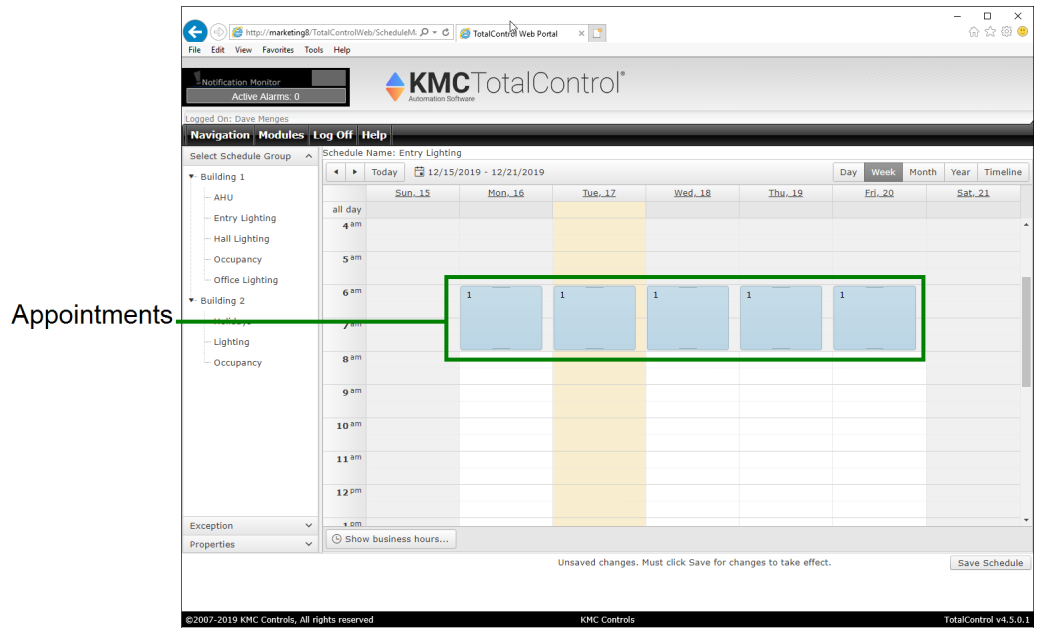
Related topics

- [Selecting a schedule on page 37](#)
- [Adding and changing appointments on page 39](#)
- [BACnet schedules on page 43](#)
- [KMD schedules on page 41](#)

Adding and changing appointments

A schedule is a set of appointments that control equipment in the building automation system. The details of the equipment operation vary based on the requirements of the building. Typically, schedules turn lights on and off, change the status of building occupancy, or control setpoint temperatures.

Illustration 6–3 Appointments in the weekly view




Adding appointments

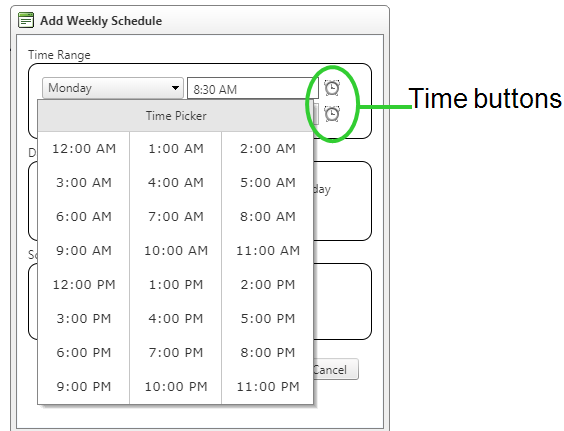
To add an appointment to a schedule, do the following:

- 1 Locate and open the schedule in the **Select Schedule Group** list.
- 2 Drag the pointer down a day column to select a block of time for the new appointment.
- 3 Right-click on the selected block of time and choose **Add Weekly Schedule** from the shortcut menu. The **Add Weekly Schedule** dialog opens.

The 'Add Weekly Schedule' dialog box is shown. It has the following fields and options:


- Time Range:** Two rows, each with a day dropdown (both set to 'Wednesday') and a time input field. The first row is '1:00 AM' and the second is '2:00 AM'. Each time field has a clock icon to its right.
- Days:** A row of checkboxes for 'Monday', 'Tuesday', 'Wednesday' (checked), 'Thursday', 'Friday', 'Saturday', and 'Sunday'.
- Schedule Value:** A 'Value' input field containing 'None' and a 'Data Type' dropdown set to 'DATA_TYPE_REAL'.
- Buttons:** 'Submit' and 'Cancel' buttons at the bottom.

- 4 Make the changes to the times in the dialog. When entering time in appointments, click the time button  to open the time selection dialog.



- 5 If this is a BACnet schedule, enter a value for **Schedule Value**.
- 6 Click **Submit** when done.
- 7 When changes are complete for the schedule, click **Save Schedule**.

To remove appointments

- 1 Locate and open the schedule in the **Select Schedule Group list**.
- 2 Hover over the appointment until the delete button  is active.
- 3 Click the delete button.
- 4 When changes are complete for the schedule, click **Save Schedule**.

To change the time in an appointment

- 1 Locate and open the schedule in the **Select Schedule Group list**.
- 2 Double-click on the appointment. The **Edit Weekly Schedule** dialog opens.
- 3 Make the changes to the times in the dialog.
- 4 Click **Submit** when done.
- 5 When changes are complete for the schedule, click **Save Schedule**.

Related topics

- [Selecting a schedule on page 37](#)
- [Changing the view on page 38](#)
- [BACnet schedules on page 43](#)
- [KMD schedules on page 41](#)

KMD schedules

In addition to setting standard appointments in KMD controllers, the following types of schedules can be set from the Web Portal.

- [KMD override appointments](#)
- [KMD Annual schedules on page 43](#)

KMD override appointments

KMD override appointments set up Override 1 and Override 2 schedule times. Interaction among KMD Weekly Schedules, Annual Schedules, and override appointments will be supplied by the system administrator.

Illustration 6–4 KMD schedule with override appointments

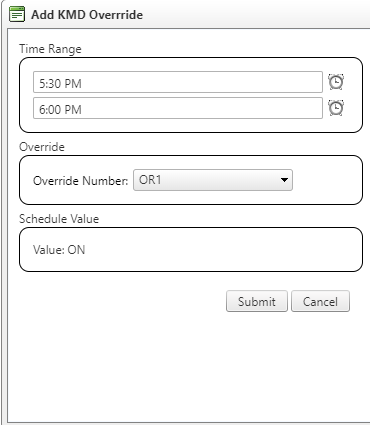
The screenshot shows the KMC TotalControl Web Portal interface. The main window displays a schedule for 'Building 1' under the 'Office Lighting' category. The schedule is set for the week of 12/15/2019 to 12/21/2019. The main schedule shows 'ON' for all days from 9 am to 11 am. A blue box highlights 'OR1 ON' appointments for the same time slot (9 am to 11 am) on all days from Sunday to Saturday. A blue arrow points from the text 'KMD override appointment' to the 'OR1 ON' box.

Adding override appointments

To add an override appointment, do the following:

- 1 Locate and open a schedule in the **Select Schedule Group** list.
- 2 Drag the pointer down a day column to select a block of time for the new appointment.

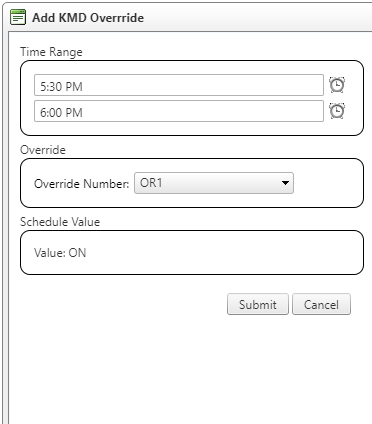
- 3 Right-click on the selected block of time and choose **Add KMD Override** from the shortcut menu. The **Add KMD Override** dialog opens.



- 4 Make the changes to the times in the dialog.
- 5 Select the override number.
- 6 Click **Submit** when done.
- 7 When changes are complete for the schedule, click **Save Schedule**.

Features of the override appointment

Illustration 6–5 Add KMD Override dialog



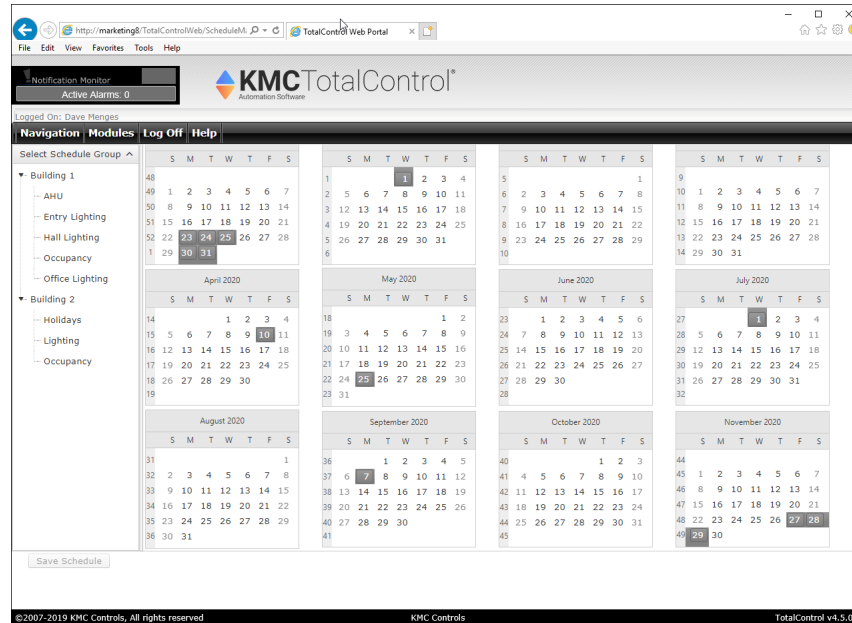
Time Range Set the effective period of the override with **Start Time** and **End Time**.

Override Number Select the override number for the override appointment.

KMD Annual schedules

Annual schedules in KMD controllers designate special days during a year such as holidays or days a building is not occupied. Typically, an annual schedule controls the override in KMD override appointments. The exact schedule is determined by the systems engineer.

Illustration 6–6 KMD annual schedule in the Web Portal



To change an annual schedule in a KMD controller, do the following:

- 1 Locate and open the schedule in the **Select Schedule Group list**.
- 2 Make the changes to the schedule by doing any of the following:
 - To set a date on the calendar, click the day. Active dates are highlighted. When the active day begins, the present value of the annual schedule will be *Active (On)*.
 - To remove a day from the schedule, click the day.
- 3 When changes are complete, click **Save Schedule**.

Related topics

- [Selecting a schedule on page 37](#)
- [Changing the view on page 38](#)
- [Adding and changing appointments on page 39](#)
- [BACnet schedules on page 43](#)
- [Editing PC-based schedules in a browser on page 47](#)

BACnet schedules

Schedules for BACnet controllers have properties that are unique to BACnet devices. BACnet schedules can be identified as those schedules with the buttons *Exceptions* and *Properties* under the list of schedules.

Changing the BACnet property

Use the **Edit Schedule Properties** dialog to change the effective period or default value of the schedule.

To change the BACnet schedule properties, do the following:

- 1 Locate and select a BACnet schedule in the **Select Schedule Group** list.
- 2 Click **Properties**.
- 3 Click **Edit Properties** and make changes to the dates in the dialog.
- 4 If required, enter a new schedule default value in the **Value** text box.
- 5 Click **Submit** when done.
- 6 When changes are complete for the schedule, click **Save Schedule**.

Features of the Schedule Properties dialog

Schedule Default Value Each day in a weekly schedule covers a 24-hour period. The property Default Value defines the state of the schedule between 12:00 A.M. (midnight) and the first appointment in a schedule list. The present value of the schedule remains at the value of the last time/value pair until 12:00 A.M.

Effective Period Set the effective period of the schedule with **Start Date** and **End Date**.

Illustration 6–7 Schedule Properties dialog

The screenshot shows a dialog box titled "Edit Schedule Properties". It is divided into two main sections. The first section, "Effective Period", contains two text input fields: "Start Date" with the value "1/1/2000" and "End Date" with the value "1/1/2100". Below these fields is an "Edit" button. The second section, "Schedule Default Value", contains a "Value" dropdown menu currently set to "None" and a "Data Type" label with the value "DATA_TYPE_ENUMERATED". At the bottom of the dialog are "Submit" and "Cancel" buttons.

BACnet exception appointments

Use an exception appointment to override the values in a BACnet appointment. Exceptions appointments are displayed in the Schedule Manager in a color different than regular appointments.

Illustration 6–8 Exception Schedule dialog

Add Exception Schedule

Schedule Number: 1 (Maximum number : 6)

Recurrence Rule

Single Date
 Date Range
 Week and Day
 Calendar Object

12/16/2019

Time Value Pairs

Start Time	Stop Time	Value
8:00 AM	12:00 AM	1

Add Delete

Event Priority: 16

Ok Cancel

Adding exception appointments

To add an exception appointment, do the following:

- 1 Locate and open a schedule in the **Select Schedule Group** list.
- 2 Drag the pointer down a day column to select a block of time for the new appointment.
- 3 Right-click on the selected block of time and choose **Add Exception Schedule** from the shortcut menu. The **Add Exception Schedule** dialog opens.
- 4 Make the changes to the appointment.
- 5 Click **OK** when done.
- 6 When changes are complete for the schedule, click **Save Schedule**.

Changing exception appointments

- 1 Open the exception appointment by doing one of the following:
 - In the calendar view, double-click the appointment.
 - In the Exceptions list, click the open hotspot **...**
- 2 Make changes to the **Add Exception Schedule** dialog.
- 3 Make the changes to the times and dates in the dialog.
- 4 Click **OK** when done.
- 5 When changes are complete for the schedule, click **Save Schedule**.

Features of the Edit Exception Schedule dialog

The **Exception Schedule** dialog includes the following choices:

Single Date A single date on which the values and times listed in the exception schedule will override the values of the weekly schedule.

Date Range A range of dates on which the values and times listed in the exception schedule will override the values of the weekly schedule.

Week and Day A day of the week and month on which the values and times listed in the exception schedule will override the values of the weekly schedule.

Time Value Pairs The method for entering time/value pairs in an exception schedule is the same method used in a weekly schedule.

Priority Sets the order of precedence for conflicting exception schedules. For example if Exception Schedule 2 has an event priority 8 and Exception Schedule 4 has an event priority of 10, then Exception Schedule 2 will override Exception Schedule 4 when there is a conflict in the values for the reference object.

Related topics

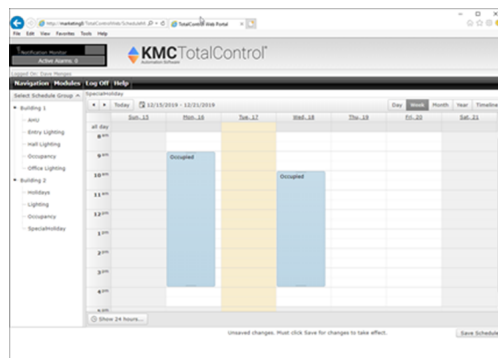
- [Selecting a schedule on page 37](#)
- [Changing the view on page 38](#)
- [Adding and changing appointments on page 39](#)
- [KMD schedules on page 41](#)

Editing PC-based schedules in a browser

A PC-based schedule is a set of one or more appointments that override an existing schedule or condition. The exact schedule, piece of equipment, or condition is determined by the systems engineer.

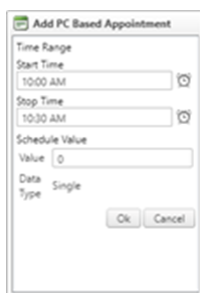
- Only points in a KMD controller are assigned to a PC-based schedule.
- The appointment may be set to Occupied, Unoccupied, or a numerical value. The available settings will depend upon system programming.
- The appointment will override normal programming for the duration of the appointment. At the end of the appointment, the normal program or schedule will resume control of system operation.
- The appointment must be entered and saved before the starting time of the appointment. No change to the system will take place if current time is after the start of a new appointment.
- The time and date that the change takes place is controlled by the time and date of the computer running TotalControl, not the computer running the browser.

Illustration 6–9 PC-based appointments in the weekly view



Adding appointments


- 1 Locate and open the schedule in the **Select Schedule Group** list.
- 2 Drag the pointer down a day column to select a block of time for the new appointment.
- 3 Right-click on the selected block of time and choose **New PC Based Appointment** from the shortcut menu. The **Add PC Based Appointment** dialog opens.



- 4 Make the changes to the times in the dialog.
- 5 Click **OK** when done.

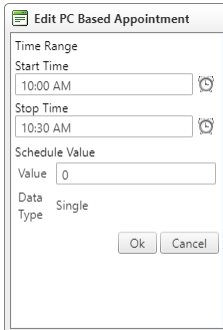
- 6 When changes are complete for the schedule, click **Save Schedule**.

Removing appointments

- 1 Locate and open the schedule in the **Select Schedule Group list**.
- 2 Hover over the appointment until the delete button  is active.
- 3 Click the delete button.
- 4 When changes are complete for the schedule, click **Save Schedule**.

Changing times in an appointment

- 1 Locate and open the schedule in the **Select Schedule Group list**.
- 2 Double-click on the appointment. The appointment dialog opens.



- 3 Make the changes to the times in the dialog.
- 4 Click **OK** when done.
- 5 When changes are complete for the schedule, click **Save Schedule**.

Features of the PC-based appointment dialogs

Start and Stop Time Sets the time span of the appointment.

Schedule Value Set the appointment to Occupied, Unoccupied, or a numerical value. The available settings will depend upon system programming.

Related topics

- [Selecting a schedule on page 37](#)
- [Changing the view on page 38](#)
- [Adding and changing appointments on page 39](#)
- [BACnet schedules on page 43](#)
- [KMD schedules on page 41](#)

Section 7: TotalControl reports

Reports for building automation systems provide a permanent record of system operation and condition. Topics in this section cover capturing data for reports as well as procedures for generating and exporting reports.

Generating reports in TotalControl is a process of capturing site data on a specific date and time and then formatting the data for a specific purpose. The report can then be used for commissioning, troubleshooting, or as a benchmark of performance. There are two types of reports:

- Operational data is viewed with the All Point Report Viewer
- Audit logs and reports are a record of changes made by operators

Topics in this section

Viewing operational reports	50
Capturing data for operational reports	53
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Viewing the Audit Log	55

Viewing operational reports

Operational reports in the site are managed through the Web Portal All Point Report Viewer module.

- Reports are generated from snapshot data saved in the site database. To set up a snapshot, see the topic [Capturing data for operational reports on page 53](#).
- Reports are different between BACnet and KMD controllers.

Illustration 7–1 All Point Report Viewer module

Name	Schedule	Status
BACnet Service (BACnet Protocol Service)	<i>Current Schedule:</i> Snapshot will be taken every Wednesday at 2:00 schedule snapshot	<i>Current Status:</i> All Point Report complete with errors. Snapshot taken at: 2/26/2020 2:04:10 AM all point override out of service run-time
Smallville (KMD Protocol Service)	<i>Current Schedule:</i> Snapshot will be taken every Thursday at 11:40 schedule snapshot	<i>Current Status:</i> All Point Report complete with errors. Snapshot taken at: 2/20/2020 11:40:43 AM all point decom manual

The following reports are available from the All Point Viewer module.

All Point The All Point report is the master data set for reporting. It is from the data in the All Point report that other reports are generated by sorting or filtering.

Override The Override report lists objects with a specified priority for writing value and all values of higher priority. This report is for BACnet devices only.

Out of service The Out Of Service report lists only those BACnet objects that have their Out Of Service properties set to *True*. This report is for BACnet devices only.

Run-time A Run-Time report lists objects that have Units set to a unit of time. This report is for BACnet devices only.

Decom The Decom report lists input points that have been out of range for more than two minutes. This report is for KMD controllers only.

Manual The Manual report lists only those points that are in manual override. A point is in manual mode when the Manual Override check box is selected in the configuration page. This report is for KMD controllers only.

Illustration 7–2 BACnet All Point report

The screenshot shows the KMC TotalControl Web Portal interface. At the top, there is a navigation bar with 'Navigation', 'Modules', 'Log Off', and 'Help'. Below this, there are buttons for 'all point', 'override', 'out of service', and 'run-time'. The 'Report Filter' section has a 'Device' dropdown set to 'All Devices' and an 'Object' dropdown set to 'Object'. The 'All Point Report' section shows a table of data for all devices.

Device Instance (Name)	Object Name (Mnemonic)	Description	Present Val	Units	PRI	OutOfSvc
Accumulators						
811111 (M Bldg Controller)	ACCUM_32 (ACC32)		#Error			NA
3333333 (Caladan)	ACCUM_02 (ACC2)	Accumulator #2	0	No Units		NA
Analog Inputs						
1 (BAC-190263CE)	SPACE_SENSOR (AI1)	Space Sensor	85.000	Degrees F		NA
1 (BAC-190263CE)	REMOTE_SENSOR (AI2)	Remote Room Sensor	-40	Degrees F		NA
1 (BAC-190263CE)	AI_03 (AI3)	Analog Input #3	3.300	No Units		NA
1 (BAC-190263CE)	AI_04 (AI4)	Analog Input #4	3.300	No Units		NA

Generating a report

To generate any of the available reports, do the following:

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **All Point Report Viewer**.
- 3 Under **Status**, choose one of the report options.

Filtering for devices or objects

Results within an open report can be filtered for specific devices or objects.

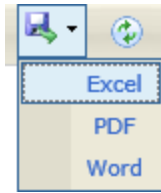
- 1 Generate a report for viewing.
- 2 In the **Report Filter** area, enter the devices or objects.
- 3 Click **View Report**.

Filtering for devices In the Report Filter area, choose a device from the Device list. Narrow the selection by typing a partial device name or device instance number in the Device box.

Filtering for objects (BACnet only) In the Report Filter area, enter the mnemonic for the object in the Object box. Examples of object mnemonics are located in the Object Name column inside of parentheses ().

Saving a report

- 1 Generate a report for viewing.
- 2 On the Report toolbar, choose the Save icon.



- 3 Choose a format for the report. See the table [Report file formats on page 52](#).
- 4 At the bottom of the page, click **Open** or **Save**.
- 5 Once you choose a format, the options for saving or viewing the data will depend on the browser and the browser settings.

Table 7–1 Report file formats

Format	Description	File name extension
Acrobat	Adobe Portable Document Format file	.pdf
Excel	Microsoft Excel spreadsheet file	.xlsx
Word	Microsoft Word file	.docx

Search for specific data in a report

- 1 Generate a report for viewing.
- 2 On the Report toolbar, enter text for the search item in the text box next to **Find**.



- 3 Click **Find**.
- 4 Click **Next** to find the next occurrence of the search item.

Related topics

- To set up a report snapshot, see [Capturing data for operational reports on page 53](#).
- To view a list of changes to the site, see [Viewing the Audit Report on page 54](#) or [Viewing the Audit Log on page 55](#).

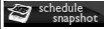

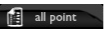


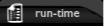
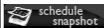
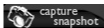


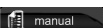
Capturing data for operational reports

Data for reports is captured with a snapshot of the system. Once captured, the data remains in the site database for sorting or filtering. A new snapshot, either immediate or scheduled, replaces the current data.



Note: A snapshot takes several minutes. The exact time TotalControl requires to perform the snapshot depends upon system configuration, number of controllers, and amount of network traffic. For best performance, schedule snapshots for times when the volume of network traffic is typically low.

Illustration 7–3 All Point Report Viewer module

Name	Schedule	Status
BACnet Service (BACnet Protocol Service)	Current Schedule: Snapshot will be taken every Wednesday at 2:00  	Current Status: All Point Report complete with errors. Snapshot taken at: 2/26/2020 2:04:10 AM    
Smallville (KMD Protocol Service)	Current Schedule: Snapshot will be taken every Thursday at 11:40  	Current Status: All Point Report complete with errors. Snapshot taken at: 2/20/2020 11:40:43 AM   

To start the snapshot, do the following:

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **All Point Report Viewer**.
- 3 Choose one of the following snapshot options:
 - Click **Capture Snapshot** to immediately start the snapshot process.
 - Click **Schedule Snapshot** to gather snapshot data at a specified time on the same day every week or the same date every month.
- 4 When the snapshot is complete, choose a report from the Status column.

Related topics

- To see system status, see [Viewing operational reports on page 50](#).
- To view a list of changes to the site, see [Viewing the Audit Report on page 54](#) or [Viewing the Audit Log on page 55](#).

Viewing the Audit Report

The Audit Report Viewer captures and displays operational changes to the system. All changes are in the report, but the report can be limited to a specific time span. To filter the audit data by user name, service type, or other criteria, see the topic [Viewing the Audit Log on page 55](#).

To view the Audit Report, do the following:

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Audit Report Viewer**.
- 3 To limit the time span of the report, do the following:
 - a. Click **Search and Filter**.
 - b. Enter a **Start Date** and **End Date**.
 - c. Click **Search**.

Illustration 7–4 Audit Report in the Audit Report Viewer.

Notification Monitor
Active Alarms: 0

Logged On: TCAdmin TCAdmin

Navigation Modules Log Off Help

[Search and Filter](#)

Search and Filter (close)

Start Date: End Date: Refresh

Most Recent Record First

Audit Report

1 of 59 100% Find | Next

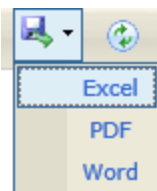
Audit Report

Site: **Goddard**

Date Time	Operator	Action String
9/26/2019 2:02:32 PM	admin	Web login request from admin on dmenges.kmc-controls.com succeeded.
9/26/2019 1:58:39 PM	admin	Web login request from admin on dmenges.kmc-controls.com succeeded.
9/26/2019 1:37:37 PM	admin	Web login request from admin on dmenges.kmc-controls.com succeeded.
9/26/2019 1:34:41 PM	admin	Web logout request from admin on dmenges.kmc-controls.com
9/26/2019 1:34:17 PM	admin	Web session maintenance or login request from admin on dmenges.kmc-controls.com succeeded.

Saving a report

- 1 Generate a report for viewing.
- 2 On the Report toolbar, choose the Save icon.



- 3 Choose a format for the report. See the table [Report file formats on page 55](#).
- 4 Once you choose a format, the choices for saving or viewing the data will depend on the browser and the browser settings.

Table 7–2 Report file formats

Format	Description	File name extension
Acrobat	An Adobe Acrobat file	.pdf
Excel	A Microsoft Excel spreadsheet file	.xlsx
Word	A Microsoft Word file	.docx

Search for specific data in a report

- 1 Generate a report for viewing.
- 2 On the toolbar, enter text for the search item in the text box next to **Find**.



- 3 Click **Find**.
- 4 Click **Next** to find the next occurrence of the search item.

Related topics

- To search and filter the audit log, see [Viewing the Audit Log on page 55](#).
- To view other reports from the Web Portal, see [Viewing operational reports on page 50](#).

Viewing the Audit Log

The Audit Log Viewer lists operational changes to the system in a list that can be filtered by any of the following criteria.

- User Name—Select from the list of authorized users
- Service Type—Changes made to BACnet or KMD controllers, or any of the building services
- Log Time—The time and date when the change was made
- Search for Phrase—A simple text search.

To view the audit log, do the following:

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Audit Log Viewer**.
- 3 To add search or filter criteria, do the following:
 - a. Click **Search and Filter** to reveal the Search and Filter area.
 - b. From the **Search Category** list, choose the criteria for the search.

- c. Set the search parameters such as time and date or user names.
- d. Click **Search**.

Illustration 7–5 Audit log in the Audit Log Viewer module

Notification Monitor
Active Alarms: 0

Logged On: TCAdmin TCAdmin

Navigation Modules Log Off Help

Search and Filter Purge Audit Log Export Refresh Every: 1 Minute Refresh

Most Recent First Expand All

Audit Log Viewer

Select a page or enter a page number: 1 Go Result range from 1/7/2019 4:37:47 PM to 9/26/2019 2:27:36 PM Page 1 of 289 Back Next

TimeStamp	Message	User Name	Service Type	Service Name (Id)	Device
09/26/2019 02:27:36 PM (UTC-4)	Web login request from admin on dmenges.kmc-controls.com succeeded.	admin	System Monitor		
09/26/2019 02:02:32 PM (UTC-4)	Web login request from admin on dmenges.kmc-controls.com succeeded.	admin	System Monitor		
09/26/2019 01:58:39 PM (UTC-4)	Web login request from admin on dmenges.kmc-controls.com succeeded.	admin	System Monitor		
09/26/2019 01:37:37 PM (UTC-4)	Web login request from admin on dmenges.kmc-controls.com succeeded.	admin	System Monitor		
09/26/2019 01:34:41 PM (UTC-4)	Web logout request from admin on dmenges.kmc-controls.com	admin	System Monitor		
09/26/2019 01:34:17 PM (UTC-4)	Web session maintenance or login request from admin on dmenges.kmc-controls.com succeeded.	admin	System Monitor		

Saving an Audit Log

- 1 Open a log for viewing.
- 2 Click **Export**. The log will be saved as a .csv file inside of a .zip file.

Purging an Audit Log

- 1 Open a log for viewing.
- 2 Click **Purge Audit Log**.
- 3 Enter a time and date. All records older than the entered time and date will be removed.
- 4 Click **Purge**.

Related topics

- To view an audit report, see [Viewing the Audit Report on page 54](#).
- To view other reports in the Web Portal, see [Viewing operational reports on page 50](#).

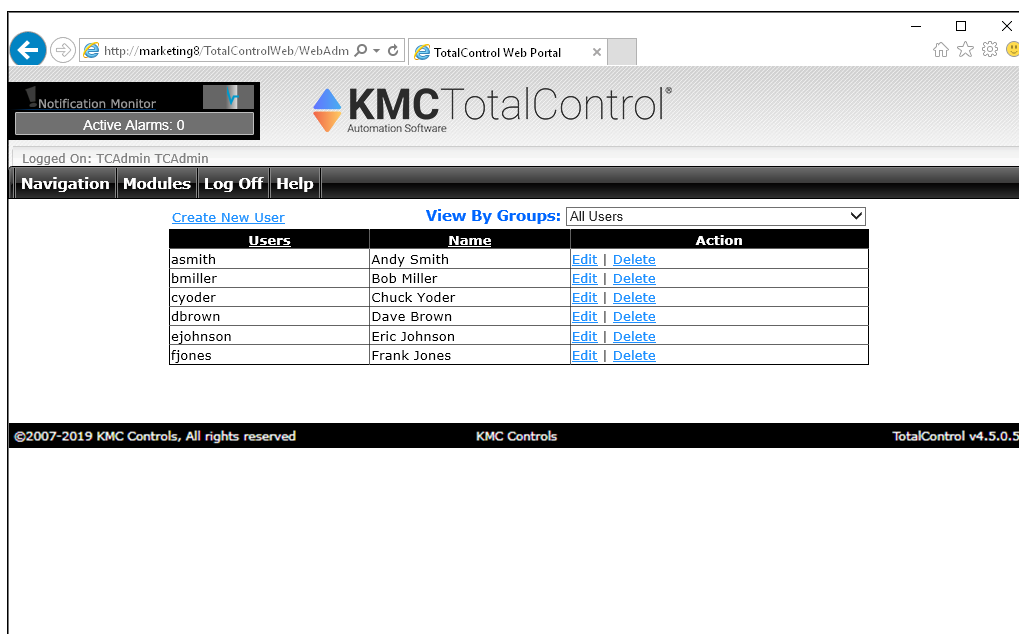
Section 8: Managing security in the Web Portal

Authorized administrators use the Web Administration module in the TotalControl Web Portal to manage security. The following topics describe methods with which authorized administrators can manage security for users and groups from a browser window.

The Web Administration module is the means by which an operator with administrator permissions manages security in the Web Portal.

- To add a new operator name, see [Adding a user to the site on page 58](#).
- To change the list of users in a group, see [Managing users in security groups on page 59](#).
- To entirely remove a user, see [Deleting a user from the site on page 61](#).
- To modify a user's password or security question, see [Changing a user password on page 61](#).

Illustration 8–1 Web Administrator module




Topics in this section

Adding a user to the site	58
Managing users in security groups	59
Deleting a user from the site	61
Changing a user password	61

Adding a user to the site

To add a new user to the site, you must log on as either of the following:

- A TC Administrator
- A Web Administrator



Note: Only a TotalControl system administrator with Administrator¹ or Web Administrator² privileges can add a user to the site.

To add a new user to the site, do the following:

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Web Administrator**.

[Create New User](#) View By Groups: All Users ▼

Users	Name	Action
brabbit	Bob Rabbit	Edit Delete
DaveM	Dave Menges	Edit Delete
ddog	Donny Dog	Edit Delete
dduck	Don Duck	Edit Delete
mmouse	Minnie Mouse	Edit Delete
tbird	Tom Bird	Edit Delete

- 3 Click **Create New User**.
- 4 In the **Add User** page, click the downward arrow next to Select a Group.
- 5 From the drop-down list, choose the Initial Group in which to place the user.

Add User

Initial Group*: Select a Group ▼

First Name:

Last Name:

Username*:

Password*:

Confirm Password*:

Password Expiration: Never ▼

Home Page:

Use Security Question

- 6 Enter the following required information.
 - A user name
 - A password and its confirmation

¹Users in the Administrator group are the only users with access to Design Studio. Operators are granted Administrator status by the Admin user in the Admin group.

²Web Administrators typically have access to all or major portions of the TotalControl Web Portal.

- 7 Enter the optional information.
 - A first name
 - A last name
 - A security question and answer. To apply the security question, select the **Use Security Question** box below Home Pages.
 - A home page
 - A password expiration date
 - A user home page
- 8 Click **Save** to add the user to the site and place in the selected group.

Related topics

- To change the users assigned to a group, see [Managing users in security groups on page 59](#).
- To completely remove a user, see [Deleting a user from the site on page 61](#).
- To modify a user's password or security question, see [Changing a user password on page 61](#).
- For an overview on configuring security from the web, see [Managing security in the Web Portal on page 57](#).

Managing users in security groups

To add a new user to a group or delete a user from a group, you must log on to the Web Portal as either an Administrator¹ or Web Administrator².

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Web Administrator**.
- 3 In **View By Groups**, choose **All Users**.

Create New User	View By Groups: All Users	▼
Users	Name	Action
brabbit	Bob Rabbit	Edit Delete
DaveM	Dave Menges	Edit Delete
ddog	Donny Dog	Edit Delete
dduck	Don Duck	Edit Delete
mmouse	Minnie Mouse	Edit Delete
tbird	Tom Bird	Edit Delete

- 4 In the row that contains the user's name, click **Edit**.

¹Users in the Administrator group are the only users with access to Design Studio. Operators are granted Administrator status by the Admin user in the Admin group.

²Web Administrators typically have access to all or major portions of the TotalControl Web Portal.

5 Click **assign** to add the user to a group or **remove** to delete the user from the group.

Group Editor		
Group Assignment <small>Warning: changes to group assignment take effect instantly</small>		
Name	Role Type	Action
Building 1	Read-Only Web User	
Operators	Web Administrator	[remove]
Building 2	Contributor Web User	[assign]
Building 3	Web Administrator	[assign]



Note: Changes take place immediately when either **assign** or **remove** is clicked.

Role Type definitions

User actions in the Web Portal are based on the Role Types assigned to their user group. Local policy may be applied to further restrict access by some user roles to specific pages, graphic elements (including navigation buttons), and modules.

Read-Only Web User Users in the Read-Only Web User role are limited to viewing elements and pages, and using the navigation buttons except those that are denied to their group. A Read-Only Web User can use only those web modules assigned to the group.

Contributor Web User Users in the Contributor Web User role have limited access to making changes to the site except those pages and elements that are denied to their group. A Contributor Web User can use only the web modules assigned to the group.

Web Administrator Users in the Web Administrator role can make the following changes to users and groups in the Web Portal.

- Adding new and existing users to groups to which the Web Administrator is a member
- Changing the password of existing users who are members of groups to which the Web Administrator is a member
- Viewing pages except pages that have been denied to the group
- Viewing graphic elements on a page except those that have been denied to the group
- Using interactive controls and navigation buttons on a page except those controls that are denied to the group
- Using the web modules assigned to the group including the Web Administrator module

Related topics

- To add a new operator name, see [Adding a user to the site on page 58](#).
- To entirely remove a user, see [Deleting a user from the site on page 61](#).
- To modify a user's password or security question, see [Changing a user password on page 61](#).
- For an overview on configuring security from the Web Portal, see [Managing security in the Web Portal on page 57](#).

Deleting a user from the site

To delete a user from the site, you must log on to the Web Portal as either an Administrator or Web Administrator.

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Web Administrator**.
- 3 In **View By Groups**, choose **All Users**.

Create New User		View By Groups: All Users <input type="text"/>
Users	Name	Action
brabbit	Bob Rabbit	Edit Delete
DaveM	Dave Menges	Edit Delete
ddog	Donny Dog	Edit Delete
dduck	Don Duck	Edit Delete
mmouse	Minnie Mouse	Edit Delete
tbird	Tom Bird	Edit Delete

- 4 In the row that contains the user's name, click **Delete**.
- 5 Click **Yes** to confirm the deletion and **No** to cancel.

Related topics

- To add a new operator name, see [Adding a user to the site on page 58](#).
- To change the list of users in a group, see [Managing users in security groups on page 59](#).
- To modify a user's password or security question, see [Changing a user password on page 61](#).
- For an overview on configuring security from the web, see [Managing security in the Web Portal on page 57](#).

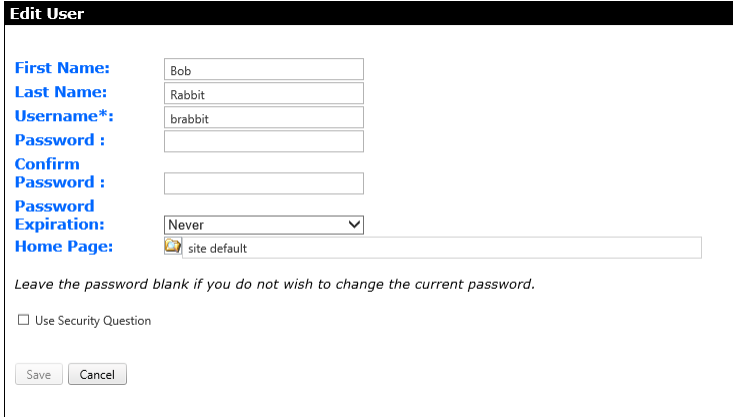
Changing a user password

To change a user password, you must log on to the Web Portal as either a TC Administrator or Web Administrator.

- 1 Log on to the TotalControl Web Portal.
- 2 From **Modules**, choose **Web Administrator**.
- 3 In **View By Groups**, choose **All Users**.

Create New User		View By Groups: All Users <input type="text"/>
Users	Name	Action
brabbit	Bob Rabbit	Edit Delete
DaveM	Dave Menges	Edit Delete
ddog	Donny Dog	Edit Delete
dduck	Don Duck	Edit Delete
mmouse	Minnie Mouse	Edit Delete
tbird	Tom Bird	Edit Delete

- 4 In the row that contains the user's name, click **Edit**. The **Edit User** window opens.



The screenshot shows the 'Edit User' window with the following fields and values:

First Name:	Bob
Last Name:	Rabbit
Username*:	brabbit
Password :	
Confirm Password :	
Password Expiration:	Never
Home Page:	site default

Leave the password blank if you do not wish to change the current password.

Use Security Question

Save Cancel

- 5 Enter a new password and its confirmation.
- 6 If necessary, change the security question and answer.
- 7 Click **Save** to change the password or **Cancel** to leave the password unchanged.

Related topics

- To add a new operator name, [Adding a user to the site on page 58](#).
- To change the list of users in a group, see [Managing users in security groups on page 59](#).
- To entirely remove a user, [Deleting a user from the site on page 61](#).
- For an overview on configuring security from the Web Portal, see [Managing security in the Web Portal on page 57](#).

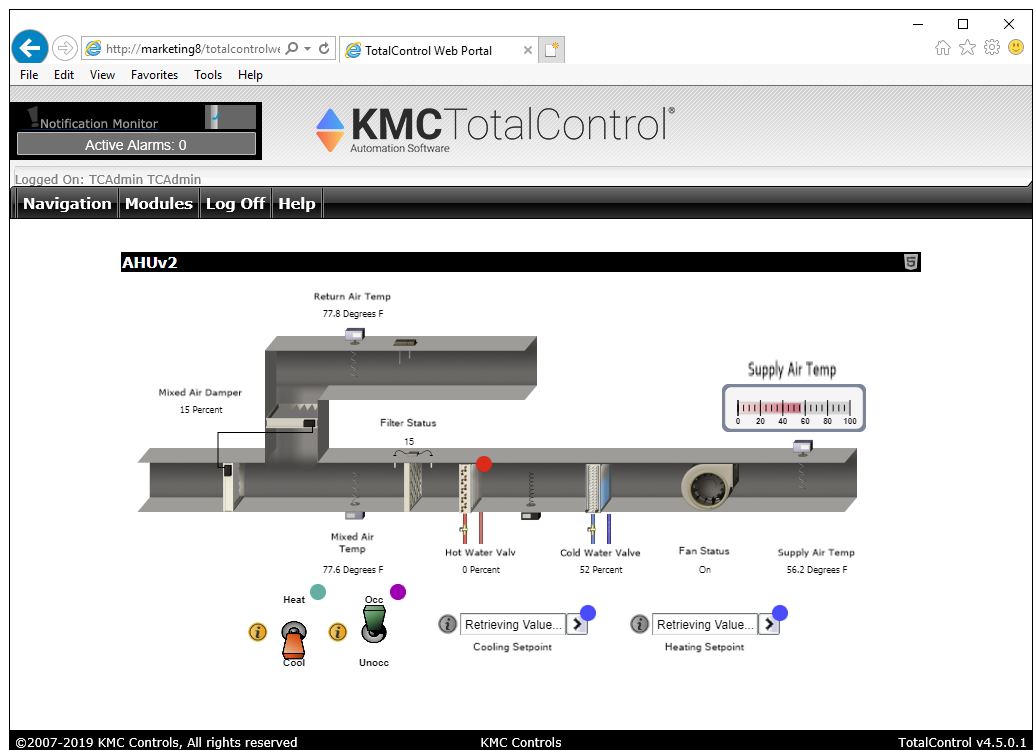
Section 9: Custom web pages

Custom web pages represent pieces of equipment in the TotalControl managed building automation system. This section covers using graphic control elements to change operating conditions of equipment represented on those pages.

A custom graphics page in the TotalControl Web Portal has several types of active elements with which an operator can do the following:

- Change operational values of the system with interactive controls.
- Navigate to other pages within the system with navigation buttons.

Illustration 9–1 Typical web page



Topics in this section

Opening pages	64
Switching page types	65
Setting timed overrides	66
Controlling the system with interactive controls	68
Controlling BACnet priority levels	70
Links to other pages	71

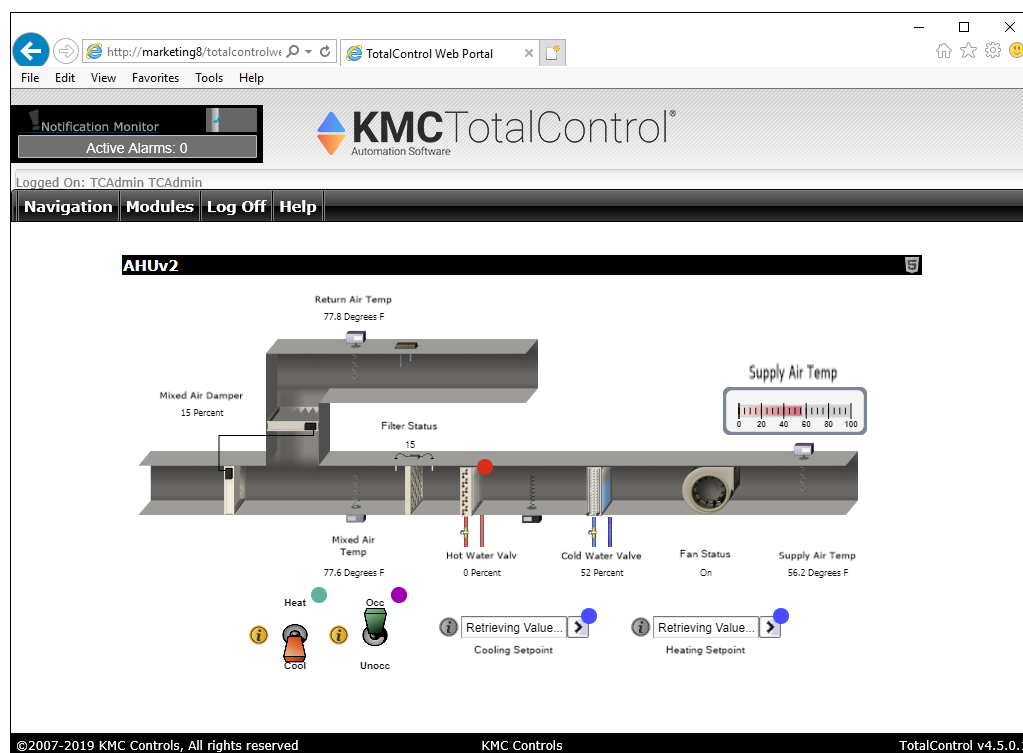
Opening pages

Custom web pages represent pieces of equipment and key functions of a building automation system.

To open a web page, do the following:

- 1 Log on to the TotalControl Web Portal.
- 2 From **Navigation**, choose a page.

Illustration 9–2 Typical web page



The status of a point is indicated by a color-coded information icon. Under most conditions, no information icons are visible. See the table [Information icons on page 64](#) for icon color codes and descriptions.

Table 9–1 Information icons

Color	Condition	Description	
Blue	●	Loading	Data is loading. May briefly be seen when the page is opened or when values on the page are updating.
Red	●	Fault	Data is not available. This could be because of an off-line controller or a network communications problem.
Purple	●	Timed override	The point is using the timed override value.
Green	●	Scheduled timed override	The point is operating normally, but a timed override is scheduled.

Related topics

- [Controlling the system with interactive controls on page 68](#)
- [Controlling BACnet priority levels on page 70](#)
- [Links to other pages on page 71](#)
- [Setting timed overrides on page 66](#)

Switching page types

Web Portal pages can be viewed with an HTML5-compliant browser and may or may not require Adobe Flash Player. The current page type is indicated on the page title bar by one of the following.

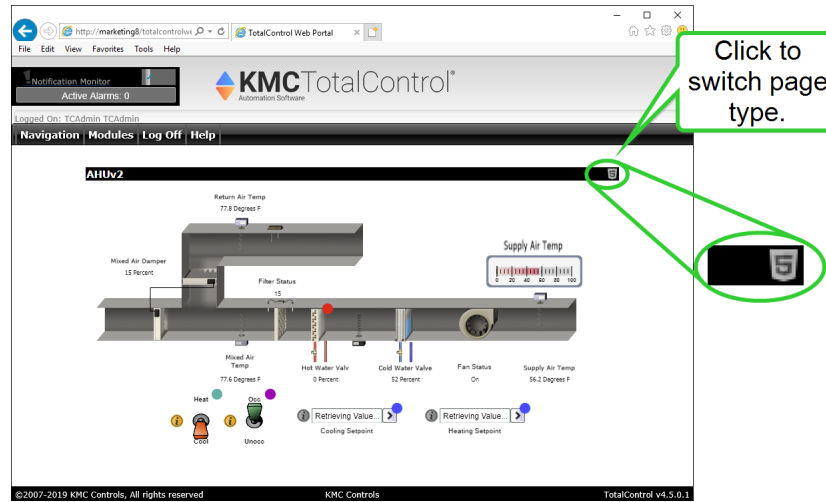
 Page is displayed using only HTML5 elements and does not need Flash.

 Page is displayed using Flash.


 No image: The page type cannot be changed.

To switch between page types (if applicable), click the symbol.

Illustration 9–3 Web page with page symbol



The choice to display a page with or without Flash is retained only as long as the page is active in the browser. If a different page is selected or the browser is closed, the next time the page is opened it will revert to the default page type for the site.

 **Note:** For some or all of the pages in the site, site administrators can prevent users from switching page types. Settings to allow page type switching cannot be changed from the Web Portal.

Setting timed overrides

Any object or point represented by an element such as a text box, toggle button, up/down button, text box or drop-down box can be overridden directly from a page. Operators who are in security groups with override permission can apply either of two types of overrides.

Immediate As soon as the Override dialog is closed, the override value becomes active.

Scheduled The override takes effect at a designated time.



Note: Operators must be in a security group that has been granted override permission by the system administrator. Override permission cannot be added in the Web Portal.

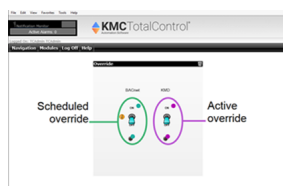
General rules for overrides

The following are general rules for working with overrides.

- Timed overrides can be set for BACnet value objects (analog, binary, multistate), some BACnet properties (outputs, loops) and KMD variables and outputs.
- The same property may be mapped to more than one graphic element on a page.
- A duration must be selected. Once the duration has expired, the override is removed and the point returns to normal operation unless a different value is entered in the Restore box.
- If Immediate is the chosen value for Override Start, the override starts as soon as OK is clicked.
- Color-coded status icons next to the point indicate the status of the override.

Purple ● The point is using the override value.
Green ● An override value is scheduled.

Illustration 9–4 Toggle button elements with overrides



To override a point, do the following.

- 1 Log on to the **TotalControl** Web Portal.
- 2 From **Navigation**, choose a page.
- 3 On the page, locate the point to override.

- 4 Right-click the point and choose **Override** from the shortcut menu.

- 5 Enter the following values:

- In **Override Value**, enter or choose the value for the override.
- In **Override Start**, choose either a time to start the override or **Immediate**.
- In **Override Duration**, select or enter how long the override will last.
- In **Restore Value**, set the value to which a property will return following the override interval.



Note: For BACnet controllers, Restore Value is available for a graphical page element that will write to a property and not to a present value.

- 6 For BACnet controllers, choose a **Priority** value for the override.



Note: A priority value is available only for a property that will write to a present value.

- 7 Click **OK** when finished. The button label changes to "Writing..." and disappears when the operation is complete.

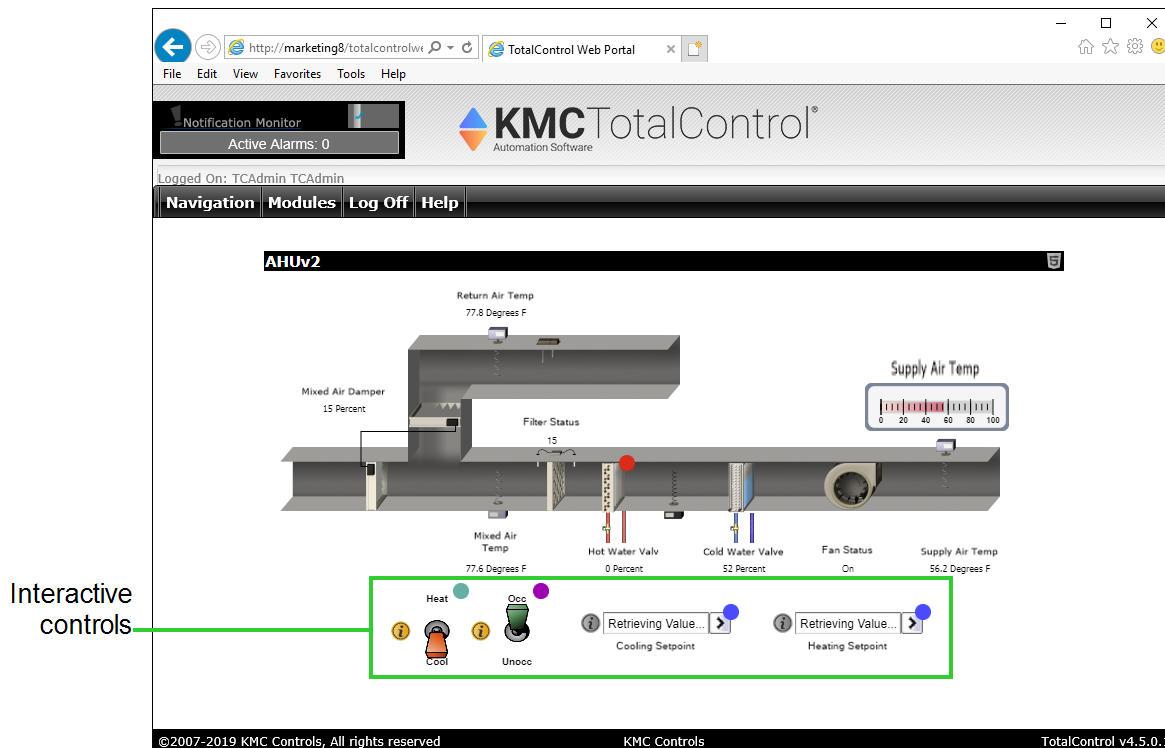
To cancel an override, do the following:

- 1 Log on to the **TotalControl** Web Portal.
- 2 From **Navigation**, choose a page.
- 3 On the page, locate the point to restore.
- 4 Right-click the point and choose **Cancel Override**.

Controlling the system with interactive controls

Operational values can be changed on Web Portal graphical pages using text boxes or switches. These interactive elements are described in the table [Graphic page entry elements \(continued\)](#).

Illustration 9–5 Interactive controls




 **Note:** Depending upon individual security settings, not all elements may be visible to every operator.

Table 9–2 Graphic page entry elements

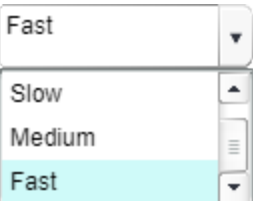
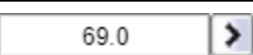
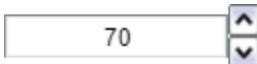

Type	Graphic image	Description
Drop-down text box		Set a value by choosing an entry from a list.
Text box		Enter text or numbers from the keyboard and press Enter to apply the change.

Table 9–2 Graphic page entry elements (continued)

Type	Graphic image	Description
Up/down text box		Increase or decrease a value by clicking the up or down arrows respectively. Alternatively, enter numbers from the keyboard and press Enter to apply the change. Hovering over the up or down arrow displays a tooltip with the maximum or minimum value associated with the bound point respectively.
Toggle button		Choose one of two values.

Drop-down box A drop-down box is a list of two or more selections. In the example shown in the table [Graphic page entry elements \(continued\) on page 69](#), the choices are *Slow*, *Medium*, and *Fast*. The exact values required to operate the equipment for each of the three choices has already been programmed by the TotalControl system administrator.

Text box Use a text box to enter a value and then press **ENTER** when finished. The range of the value entered may be limited by the TotalControl programming for the equipment.

Up down text box Increment or decrement a value in an up/down button text box by clicking the up or down buttons next to the box. Values may also be entered manually similar to Text box operation. The range of the value entered may be limited by the TotalControl programming for the equipment.

Toggle switch A toggle switch sets the state of a piece of equipment to one of two values such as On or Off, Stop or Go, Auto or Manual. The toggle switch element may appear on a page in either of two ways.

- As the standard library image of a toggle switch. This is shown in the table [Graphic page entry elements \(continued\)](#).
- As a custom image selected by the TotalControl system administrator.

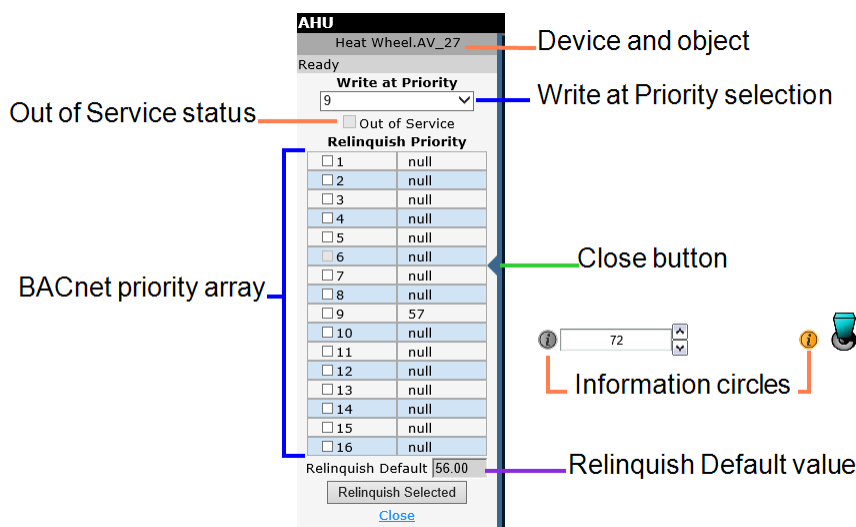
Clicking either a standard or custom toggle switch image changes the state of the controlled equipment.

Controlling BACnet priority levels

Text boxes and the toggle switch elements that control BACnet properties have an Information circle icon next to them. Clicking an information circle opens the BACnet Priority menu. Use the menu to change the priority for writing and relinquishing a value in the priority array.

The Relinquish Default and Out of Service properties are for information only and cannot be changed from the menu.

Illustration 9–6 The BACnet Priority menu



A gray or blue information icon background changes to orange when a value is entered at BACnet priority 8 or higher. An information icon background changes to red when an action is not permitted.

Table 9–3 Color code for BACnet information circle icons

	Normal state for Priorities 9-16
	Priorities 9-16 when hovering
	Priorities 1-8
	Operation not permitted

To change the BACnet priority for writing, do the following:

- 1 Click the information circle icon next to a text box or toggle switch element. The Priority menu opens.
- 2 From **Write at Priority**, choose a new priority level.
- 3 When finished, click **Close** or the close button (✖). The Priority menu will also close when a new value is entered into a text box.


New values entered in the text box or toggle switch element will be entered into the priority array at the new level.

To relinquish a priority level, do the following:

- 1** Click the information circle next to a text box or toggle switch element. The Priority menu opens.
- 2** Select the check boxes to relinquish a priority level.
- 3** When finished, click **Relinquish Selected**.

Links to other pages

In addition to using the Navigation menu to select pages, a page may also include a navigation button or hotspot.

- A navigation button  is a visible button on a graphics page that links to either other pages or a viewer.
- A hot spot is an area on a page that is a link to another page. This is typically used on a system diagram or building floor plan to link to equipment pages.

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