Setting Up Email and Text Alerts in Your Supervisory Controller

How to Send Emails and SMS Alarm Messages

Logging In

1. Launch a preferred web browser.

	≜ ⁽²⁾ :
COPELAND	
& user	
₼ ••••••	
	Login
Figure 1 - Log into the Su	pervisory Controller



- 2. Enter the IP Address of the device.
- 3. The default IP Address is **192.168.0.250** for **ETH0** and **192.168.1.250** for **ETH1**.
- 4. Log into the Supervisory Controller by selecting **Login** located at the upper right side of the screen and enter your username and password.

How to Go to Network Settings

- 1. Click the Setup (gear) 🔯 icon.
- 2. Click Configure System.
- 3. Click General System Properties.
- 4. Click **Network Settings** on the General System Properties page. Click **Advanced** to see all settings.



Figure 2 - Access General System Properties



If Using Gmail, You Must Set Up a DNS Server:

For DNS Server 1 and 2 - A valid DNS server must be supplied to resolve "smtp.gmail.com"

General System Properti	85	Basic	Save
COM Ports Network	Settings Localization System Values		
Host Name	SiteSupervisor		
Domain Name			
ETH 0 DHCP Enabled	DISABLED		
* ETH 0 IP Address	192.168.0.250		
* ETH 0 Subnet Mask	255.255.0		
* ETH 0 Default Gateway			
ETH 0 MAC Address	0.0000000000000000000000000000000000000		
DNS Server 1	8.8.8.8		
DNS Server 2	8.8.4.4		

Figure 3 - Network Settings for Internet (TCP/IP)

Messaging Setup

Email Messaging Setup

1. Scroll down to the bottom of the page to locate the options for email and text messaging:

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General System Properties				asic	Save
COM Ports Network Settings	Localization System Values				
E-MAIL(SMTP)					
SMTP enabled	ENABLED				
* SMTP Server(IP address or URL)	smtp gmail.com				
SMTP Port	- 587 +				
SMTP Server Security Type	Username/Password with TLS v				
* Username	SiteSupervisorEmailTest@gmail.com				
* Password					
Retry delay	00.02.00 0				
Max retries	- 1 ·				
Sender Email Address	SiteSupervisor@copeland.com				
Test Email Address	SiteSupervisorEmalTest@gmail.com				^

Figure 4 - Email Messaging

2. Click the gray box to toggle ENABLED for SMTP email messaging. The setup options will appear after enabling.

SMTP Server

- SMTP Server (Simple Mail Transfer Protocol) is an Internet standard for electronic mail transmission.
- SMTP Server can either be the server name or IP Address.
- Check with your local IT for the availability of SMTP on your local server.
- Example of an SMTP server that is available for public use is **smtp.gmail.com**.
- When SMTP has been enabled, the **Test Email Address** option becomes available. Enter the sender's email address and click **Send E-mail** to test and verify that notifications will be received by the correct email.

General System Properti	95	Basic	Sav
COM Ports Network	Settings Localization System Values		
Host Name	SiteSupervisor		
Domain Name			
ETH 0 DHCP Enabled	DISABLED		
* ETH 0 IP Address			
* ETH 0 Subnet Mask	255 255 255 0		
ETH 0 Default Gateway			
ETH 0 MAC Address	00.XXXX00.00.XX		
DNS Server 1	8888		
DNS Server 2	8.8.4.4		

Figure 5 - SMTP Server

Default Gmail SMTP Settings

- Gmail SMTP server address: smtp.gmail.com
- Gmail SMTP username: Your full Gmail address (for example, yourusername@gmail.com)
- Gmail SMTP password: Your Gmail password
- Gmail SMTP port (TLS): 587 (for port 587, the Authentication type must be Username/Password TLS)
- Gmail SMTP port (SSL): 465
- Gmail SMTP TLS/SSL required: yes

IMPORTANT: For Gmail, access from inside the Gmail account must be enabled for less secure applications to receive emails.

E3/Site Supervisor Gmail SMTP Setup

The Sender Email Gmail Account will need to enable two-factor authentication and setup an APP PASSWORD for the E3/SS to use.

- 1. Navigate to myaccount.google.com/security and login with the SENDER EMAIL username and password.
- 2. Search App passwords in the Search Google Account search field.
- 3. Select App passwords from the results.



4. In the App Passwords page, click Select App and select Other (Custom Name) from the drop-down menu.

Go	ogle Account			0 🎬
<	- App password	ls	from one on devices that	dan't sumport 0 Stop
V	erification. You'll only need t	o enter it once so you do	n't need to remember it. Le	arn more
	Your app passwords			
	Name	Created	Last used	
	E3	Feb 21	Feb 22	Î
	Select the app and device	you want to generate th	e app password for.	
	Select app	Select device	~	
	Mail Calendar			GENERATE
	Contacts	_		
	YouTube	_		
	Other (Custom name)			

Figure 7 - Account Security

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5. Name the E3/Site Supervisor and click the Generate button.



Figure 8 - Generate App Passwords

6. Repeat steps 4-7 for each device that will be generating email alerts.

Authentication Type

General System Properties	
COM Ports Network Settings Loc	alization System Values
E-MAIL(SMTP)	
SMTP enabled	ENABLED
SMTP Server	
SMTP Port	• 25
Authentication type	No Authentication
Username	
Password	
Default forward svc	
On error forward svc	
Max retries	- 0 min-0 *
From E-mail address	SiteSupervisor@copeland.com
Retry delay	00.02.00



- Check with the local IT server for the Authentication type to access the SMTP server.
- Set the **Username** (your email address such as Gmail or Yahoo) and **Password** (your password for that email account).

Complete SMTP Setup - Set Max Retries

Gener	ral System Properties			
CO	M Ports Network S	ettings	Localization	System Values
	Retry de	ay 00:	02:00	
	Max retri	es 🗕	1	
	Sender Email Addre	ss Site	Supervisor@cope	eland.com

Figure 10 - Max Retries

- Retry delay Leave at default setting of 00:02:00
- Max retries Set to 1
- Sender Email address Set the email address the Supervisory Controller will use to send Alarm Communications.

Note: The email address used should be a valid user on the SMTP server.

Text Messaging Setup

Enabling SMS Setup

Enter the IP Address or DNS from the ISP in the Domain Name field:

s Localization System Values	
—	
DISABLED	
255.255.0	
9	gs Localization System Values DISABLED 255.255.0

Figure 11 - Domain Name

Under TEXT MESSAGING (SMS), configure the following:

- SMS enabled Enables or disables the SMS network setup. SMS support must be ENABLED.
- SMS Max retries Set the maximum number of retries for SMS Alarm Communications to 1.
- SMS Retry delay Set the time interval between each retry. Leave at default setting of 00:02:00.
- From SMS address Leave it blank or enter the mobile phone number in the format of 3-digit area code and 7-digit phone number with no spaces. For example: 9991234567.

General System Properties			
COM Ports Network Setti	ngs Localization System Values		
TEXT MESSAGING(S	MS)		
SI	//S enabled	ENABLED	
SMS	Max retries 📃 0		min = 0
SMS	Retry delay 00:02:00		0
From SI	/IS address		

Figure 12 - SMS Setup

Managing Users

- 1. Click the **Setup** (gear)
 - Click Configure System.
- З. Click Manage Users.

2.

← 🏚 🔶	С	0 🖬 🗘	?	🌲 ⁽¹⁶⁾	🕂 Logout
Summaries 1.			Advanced	Collapse all	Expand all
System Logs & Statistics					
Configure System 2.	^				
Logging Groups		CASE TEMP ACTIVE CASE SP. VALVE PCT			
Alarm Communications		NONE" NONE" NONE"			
File Management & Licensing		▲ 率 诊 帶			
General System Properties					
Manage Users 3		1			
My Profile					

Figure 13 - Managing Users

View and Edit Users

- 1. From here, you can view, edit, or delete users.
- To add a user, click the plus sign and Create a User. 2.

icon.

- 3. To edit a user, click the wrench icon 🖌
- To delete a user, check the box on the left side of the 4. user name and click the Delete button.





Create New User

- 1. Click Create a User.
- 2. The below fields are required:
 - User Name
 - **Actual Name** •
 - Password •
 - **Confirm Password**

Manage Users							
Create a User							
user ()	بر	ŵ	+ User Name		lser Name	 Actual Name 	Actual Name
			 Password 		assword	 Confirm Password 	Confirm Password
			Contact In	ormation			
			0000000				
			Email		imail	Mobile Phone(SMS)	Mobile Phone(SMS)
			Office Phone	Ŀ	ffice Phone		
			User Inform	ation			
			+ Select User	Role: O	Energy Manager 🚯	User Description	User Description
				0	Von-Technical End User		
				0	Nonitoring Staff		
					Technician 😈		
				0	ryanan Anna 🐨		
				0	reald a User Role		

Figure 15 - Default User Profile

Note: The User Name and Password created here can be used to log into the Supervisory Controller.

Note: These fields can be left blank if this user will not be receiving Alarm Communications via email or SMS.

•	Contact information for the user
	must be filled out for them to
	receive Alarm Communications
	via email or SMS.

Contact Information		
Email	Mobile Phone(SMS)	
Office Phone]	

• Email (Note to verify the email address is valid to receive emails)

Figure 16 - Contact Information

Mobile Phone (SMS) (Note to verify the mobile phone number is correct and in the following format: phone_number@carrier_txt_domain (55512345678@txt.att.net)

Office Phone

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Below are some examples of SMS addresses for those in the United States:

- T-Mobile: phonenumber@tmomail.net
- Virgin Mobile: phonenumber@vmobl.com
- Cingular: phonenumber@cingularme.com
- Sprint: phonenumber@messaging.sprintpcs.com
- Verizon: phonenumber@vtext.com
- Nextel: phonenumber@messaging.nextel.com
- U.S. Cellular: phonenumber@email.uscc.net
- Cricket: phonenumber@sms.cricketwireless.net
- Boost Mobile: phonenumber@smsmyboostmobile.com
- AT&T: phonenumber@txt.att.net
- phonenumber = your 10-digit phone number

Note: For those outside the United States, please contact your local service provider.

Note: The Contact Information fields can be left blank if the user will not be receiving Alarm Communications via email or SMS (Figure 16).

User Information		
*Select User Role:	User Description	
Energy Manager I		
Non-Technical End User 9		
Monitoring Staff ()		
Technician 3		
System Admin 6		
Create a User Role		

Figure 17 - User Information and Roles

3. The User Information area allows the user's login access level to be set. Depending on the selected role, the user can View, Control, Configure, or Administer items listed in the action area for that role. To view more details about

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what each role can do, click the 🚯 icon next to the role name.

4. Click Save.

Alarm Communications

- 1. Click the Setup (gear) 🄅 icon.
- 2. Select Alarm Communications.

\$	С		?		G rob
Summaries 1.			Advanced	Collapse all	Expand
Case Defrost Schedule Summary					
Network Summary					
System Summary					
System Logs & Statistics		NONE" NONE" NONE"			
Configure System 2.	^	▲ 率 l ∞ 察 XM679K 3.4			
Logging Groups					
Alarm Communications					
File Management & Licensing					
General System Properties					
Manage Users					
My Profile					

Figure 18 - Alarm Communications

Creating an Alarm Notice

- 1. Click **Edit** and enter a unique name for the alarm notice.
- 2. Select the desired options to filter the alarm notice. They can be filtered via **Category, Alarm Type,** and **Resolution:**

NarmComm_001	4	POINT NAME	VALUE	UNIT	POINTER
AU .		App Name	AlarmComm_001		
		App Name	Maniformi_001		

3. Click Add an Alarm Notice to create a new Alarm Notice.

Note: It is assumed that role-based user access is already set up at this stage. Otherwise, role-based user access must be configured (Figure 16).

Al	arm Communications
6	Add an Alarm Notice
	\smile
Fiau	re 19 - Add an Alarm Notic

- 3. Add Users will list the available users created in Manage Users.
- Click the **Recipients** tab to see a list of users already set up in the system - from here you can choose the communication type they should receive (email, SMS).

If a user has no email or mobile contact information available, **Not set** will appear next to the user name.

G Add an Alarm Notice		General Category	Alarm Type Resolution St	chedule Relay I	Recipients
AlarmComm_001	1 1	POINT NAME	VALUE	UNIT	POINTER
All	Û	App Name	AlarmComm_001		

Figure 21 - Recipients Tab

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5. If you wish to receive notifications and it has not yet been set up, click **Create New User** and fill out all of the appropriate fields. Select **Email** and/or **sms**.

← ‡	f	C 🛊 🗖				
+ Add an Alarm Notice		Create New I	Jser			
AlarmComm_001 ①	<i>ب</i> مر	* User Name	User Name	* Actual Name	Actual Name	Å
		* Password	Password	* Confirm Password	Confirm Password	- 1
		Contact Informa	tion			1
		Email	Email	Mobile Phone(SMS)	Mobile Phone(SMS)	
		Office Phone	Office Phone			- 1
		User Information	1			
						Save

Figure 22 - Create New User (Optional)

Create a User user User Name User Name Actual Name Actual Name Actual Name Actual Name Actual Name Actual Name Actual Name Actual Name Actual Name Actual Name Actual Name Actual Name Actual Name Act	Aanage Users						
Juser Name Juser Name Actual Name Content Information Email Contact Information Email Description User Information Select User Role: Office Phone User Description User Description User Description User Description Office Phone Office Information Select User Role: Office Information Office Phone Office Phone Office Phone User Information Select User Role: Office Phone Office Information Office Phone Office Phon	Create a User						
Password Password Confirm Password Mobile Phone(SMS) Mobile Phone(SMS) Mobile Phone(SMS) Mobile Phone(SMS) Mobile Phone(SMS) Mobile Phone(SMS) User Information User Information Select User Role: Select Us	ser 🕕	۶	Û	 User Name 	User Name	* Actual Name	Actual Name
Contact Information Email Email Mobile Phone(SMS) Mobile Phone(SMS) Office Phone Office Phone User Information * Select User Role: Energy Manager User Information Soft Contact and End User User Description				* Password	Password	* Confirm Password	Confirm Password
Contact Information Email Email Mobile Phone(SMS) Mobile Phone(SMS) Office Phone User Information User Information User Information User Contract Information Contract I							
Email Mobile Phone(SMS) Mobile Phone(SMS) Office Phone Office Phone User Information * Select User Role: Energy Manager ① Worthorn Technical End User ② Monitoring Staff ② Technician ① System Admin ③ O Create Autor Role:				Contact Informat	lion		
Office Phone User Information * Select User Role Non-Technical End User User Description User Description User Description User Description User Description Osplate Markin Osplater Admin Osplater				Email	Email	Mobile Phone(SMS)	Mobile Phone(SMS)
Office Phone Office Phone User Information * Select User Role: Non-Technical End User Monitoring Staft Technician © System Admin © Office Phone							
User Information				Office Phone	Office Phone		
Select User Role Onon-Technical End User User Description User Description Onon-Technical End User Technician Technician System Admin Orente July Frole				User Information			
Non-Technical End User Monitoring Staff Technician Staff StaffmAdmin Contact Liver Folde				* Select User Role:	Energy Manager	User Description	User Description
 ○ Monitoring Staff ● ○ Technician ● ○ System Admin ● ● Create at User Fole 					Non-Technical End User ●		
 ○ Technican ● ○ System Admin ● ● Create a User Fole 					 Monitoring Staff 		
○ System Admin ● ○ Create a User Role					Technician		
					System Admin G Create a Liser Role		
					•		

1. Select the user who will be notified by Alarm Communications. Check the appropriate boxes to enable the email and/or SMS notification.

÷ 💠	A	G	Image: Control of the second secon			? 🖡 ⁽³⁾ 🕂 Logout
Alarm Communications						View Save
Add an Alarm Notice	6	-	General Category Alarm Type	Resolution Schedule Relay Reci	pients	POINTER
All	/	Û		All	UNIT	FORTER
			Recipients	E-mail SMS		
				Create New User		
			Figure 24 -	Add Users Checkbox		

2. Notifications will be sent to the email address and/or mobile phone number provided in the user's contact information.

For more information about Site Supervisor including release notes and the full user manual, scan the QR code.



Visit our website at copeland.com/en-us/products/controls-monitoring-systems for the latest technical documentation and updates. For Technical Support call 833-409-7505 or email ColdChain.TechnicalServices@Copeland.com



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