

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.



Figure 1 - Log into the Supervisory 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.

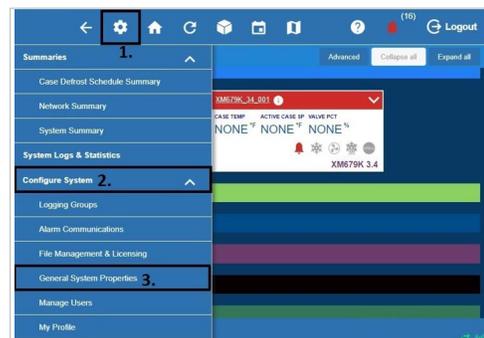
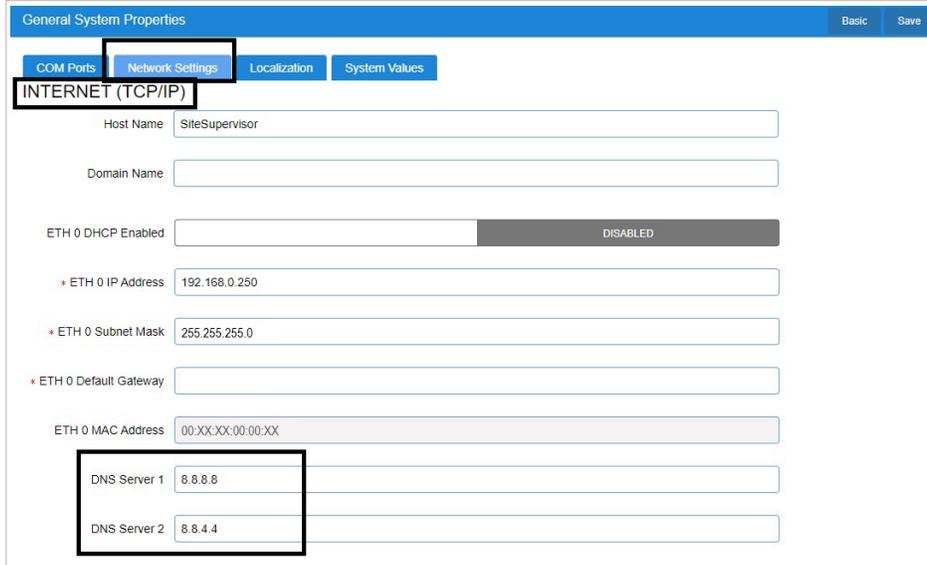


Figure 2 - Access General System Properties

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"



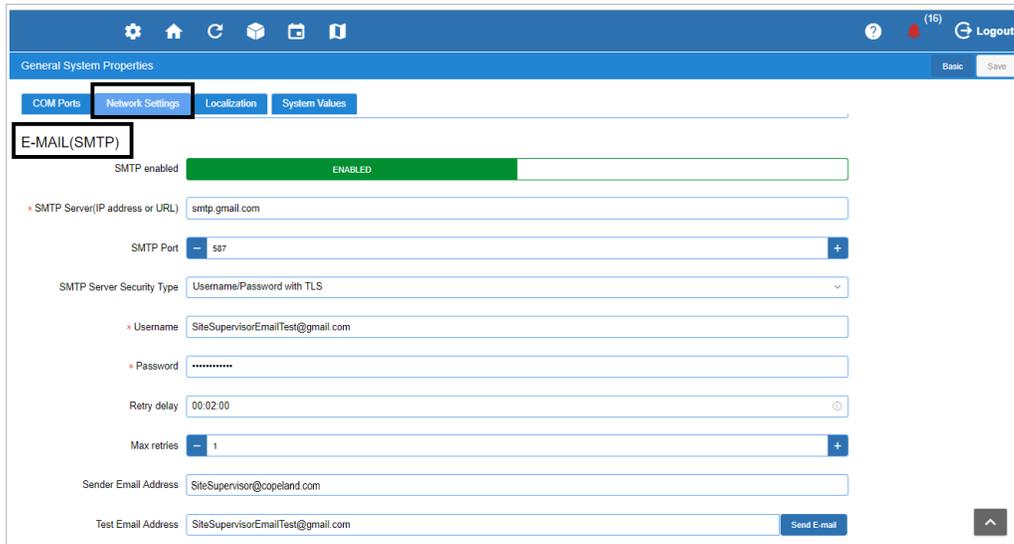
The screenshot shows the 'General System Properties' dialog box with the 'Network Settings' tab selected. Under the 'INTERNET (TCP/IP)' section, the 'DNS Server 1' field is set to '8.8.8.8' and the 'DNS Server 2' field is set to '8.8.4.4'. Other fields include Host Name (SiteSupervisor), Domain Name, ETH 0 DHCP Enabled (DISABLED), ETH 0 IP Address (192.168.0.250), ETH 0 Subnet Mask (255.255.255.0), ETH 0 Default Gateway, and ETH 0 MAC Address (00:XX:XX:00:00:XX).

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:



The screenshot shows the 'General System Properties' dialog box with the 'Network Settings' tab selected. Under the 'E-MAIL(SMTP)' section, the 'SMTP enabled' toggle is set to 'ENABLED'. Other fields include SMTP Server(IP address or URL) (smtp.gmail.com), SMTP Port (587), SMTP Server Security Type (Username/Password with TLS), Username (SiteSupervisorEmailTest@gmail.com), Password (masked), Retry delay (00:02:00), Max retries (1), Sender Email Address (SiteSupervisor@copeland.com), and Test Email Address (SiteSupervisorEmailTest@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.

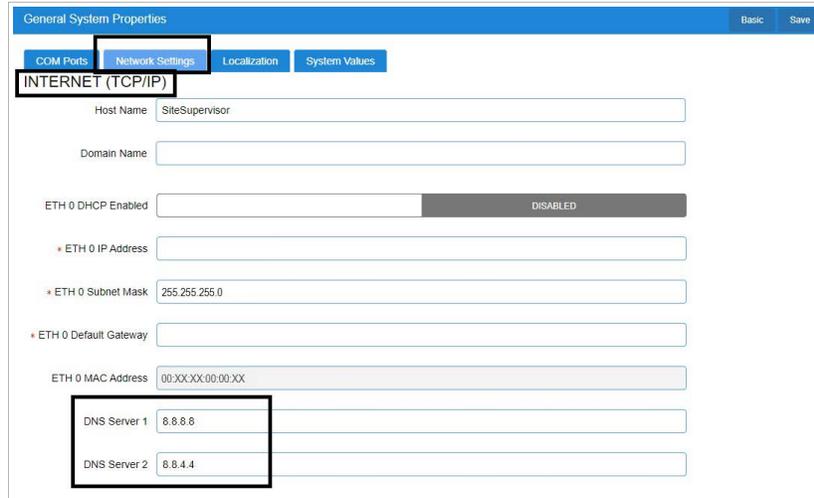


Figure 5 - SMTP Server

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.

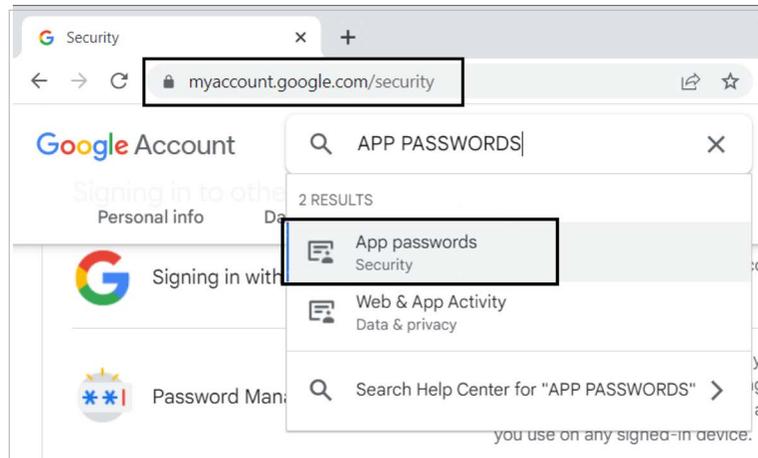


Figure 6 - Account Security

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

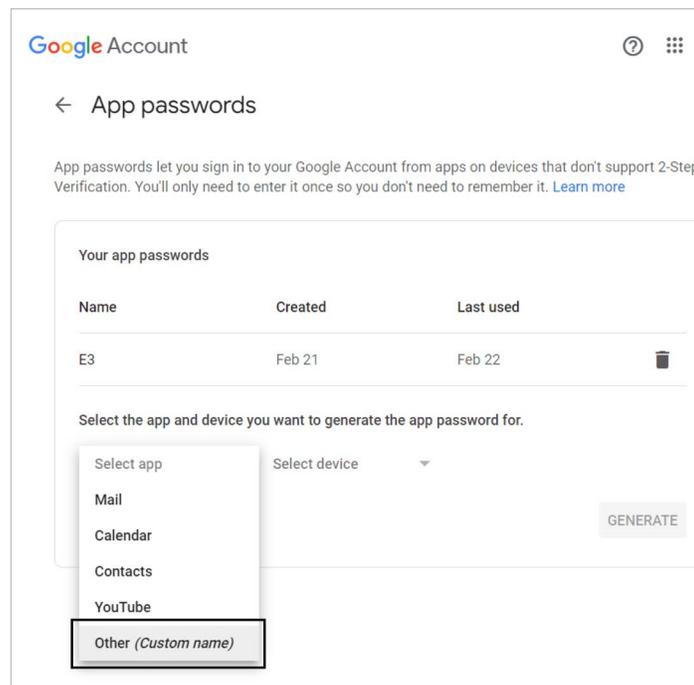


Figure 7 - Account Security

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

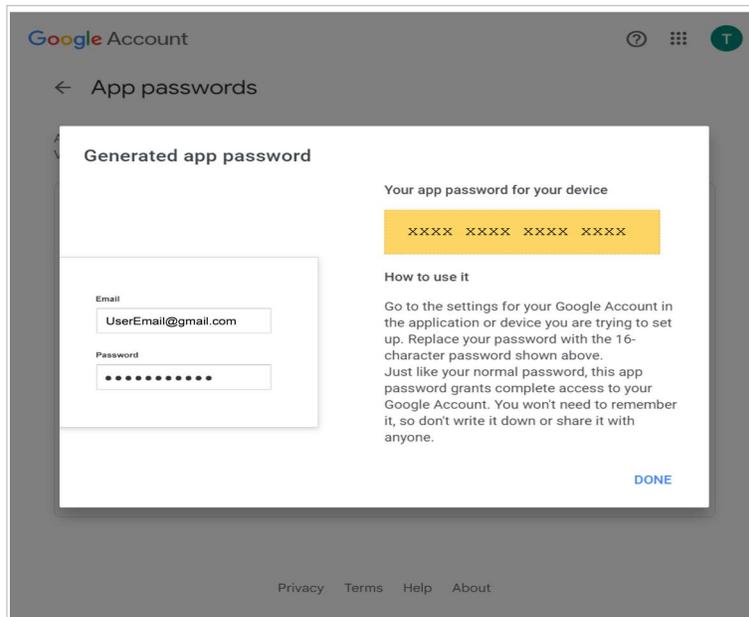


Figure 8 - Generate App Passwords

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

Authentication Type

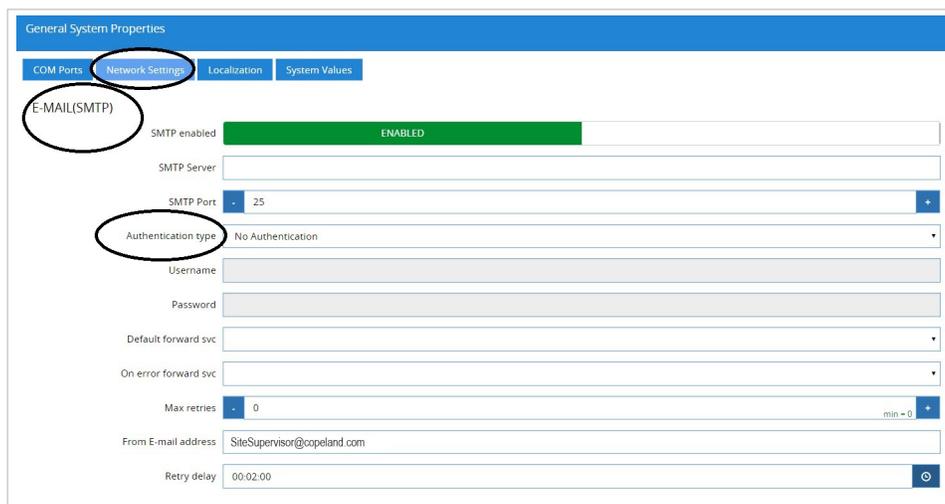
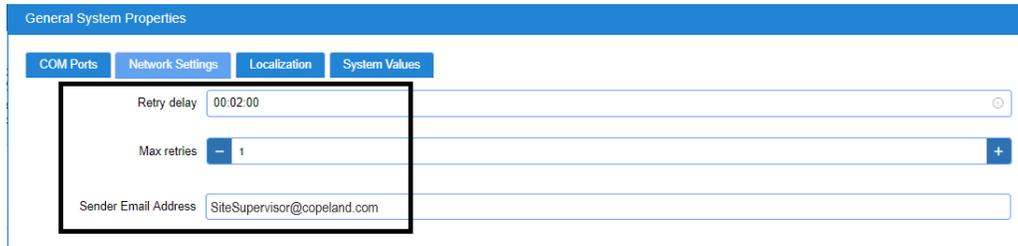


Figure 9 - Authentication Type

- 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



The screenshot shows the 'General System Properties' window with the 'System Values' tab selected. A black box highlights three fields: 'Retry delay' set to '00:02:00', 'Max retries' set to '1', and 'Sender Email Address' set to 'SiteSupervisor@copeland.com'.

Figure 10 - Max Retries

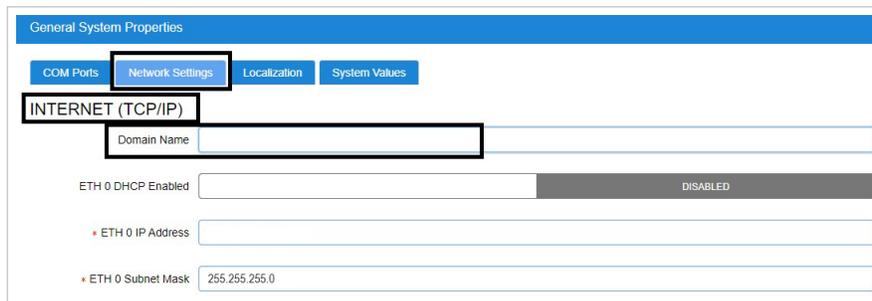
- **Retry delay** - Leave at default setting of **00:02:00**
- **Max retries** - Set to **1**
- **Sender Email address** - Set the email address the Supervisory Controller will use to send Alarm Communications.

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:

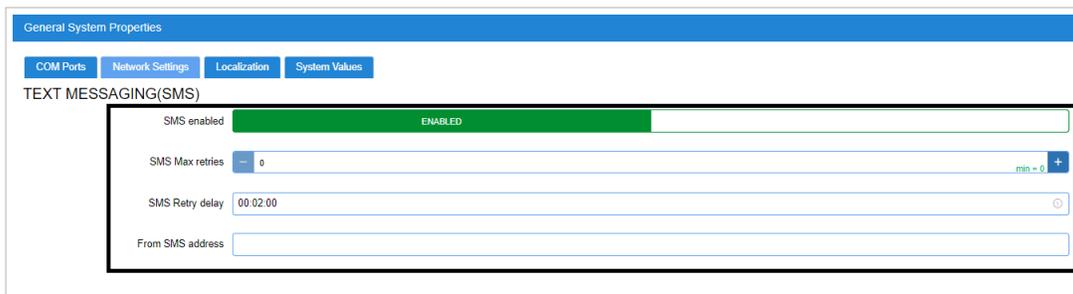


The screenshot shows the 'General System Properties' window with the 'Network Settings' tab selected. The 'INTERNET (TCP/IP)' section is expanded, and the 'Domain Name' field is highlighted with a black box. Other fields include 'ETH 0 DHCP Enabled' (DISABLED), 'ETH 0 IP Address', and 'ETH 0 Subnet Mask' (255.255.255.0).

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.



The screenshot shows the 'General System Properties' window with the 'System Values' tab selected. The 'TEXT MESSAGING(SMS)' section is expanded, and a black box highlights four fields: 'SMS enabled' (ENABLED), 'SMS Max retries' (0), 'SMS Retry delay' (00:02:00), and 'From SMS address' (empty).

Figure 12 - SMS Setup

Managing Users

1. Click the **Setup** (gear)  icon.
2. Click **Configure System**.
3. Click **Manage Users**.

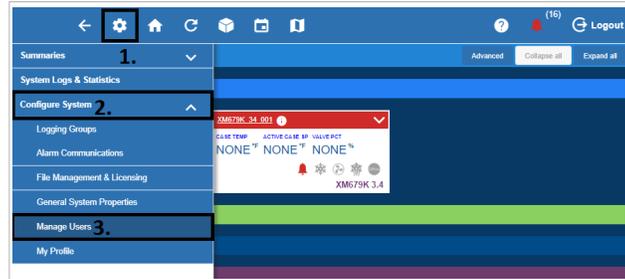


Figure 13- Managing Users

View and Edit Users

1. From here, you can view, edit, or delete users.
2. To add a user, click the plus sign and **Create a User**.
3. To edit a user, click the wrench icon .
4. To delete a user, check the box on the left side of the user name and click the **Delete** button.

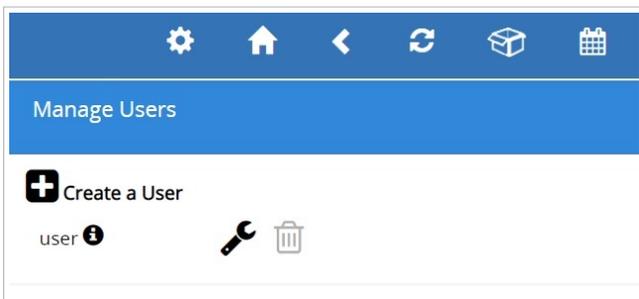


Figure 14 - Default User Profile

Create New User

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

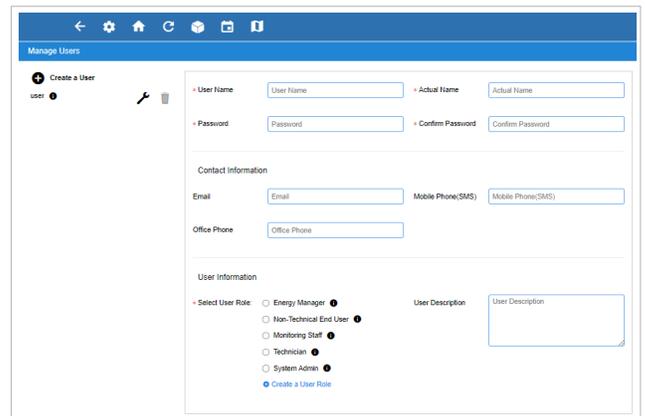
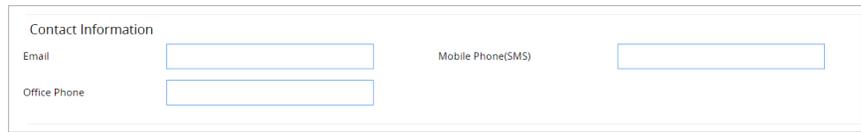


Figure 15 - Default User Profile

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.
- **Email** (Note to verify the email address is valid to receive emails)
- **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**



The form titled "Contact Information" contains three input fields: "Email", "Office Phone", and "Mobile Phone(SMS)". Each field is represented by a rectangular box with a blue border.

Figure 16 - Contact Information

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).



The form titled "User Information" includes a section for selecting a user role. The roles listed are: Energy Manager, Non-Technical End User, Monitoring Staff, Technician, and System Admin. Each role has a radio button and an information icon. Below the roles is a link "Create a User Role". To the right of the role selection is a large text area labeled "User Description".

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 what each role can do, click the  icon next to the role name.
4. Click **Save**.

Alarm Communications

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

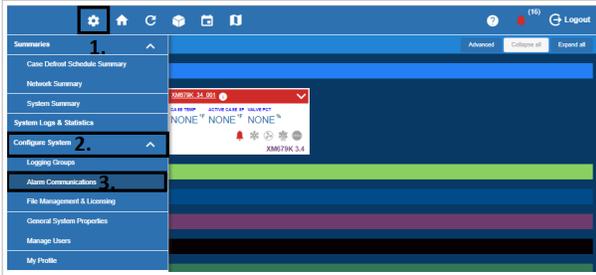


Figure 18 - Alarm Communications

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).



Figure 19 - Add an Alarm Notice

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**:



Figure 20 - Create an Alarm Notice

3. *Add Users* will list the available users created in *Manage Users*.
4. 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.



Figure 21 - Recipients Tab

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**.

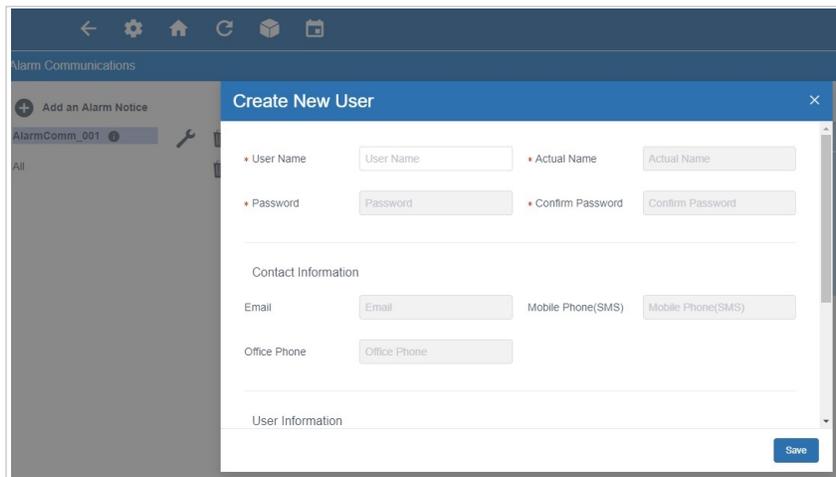


Figure 22 - Create New User (Optional)

Add Users

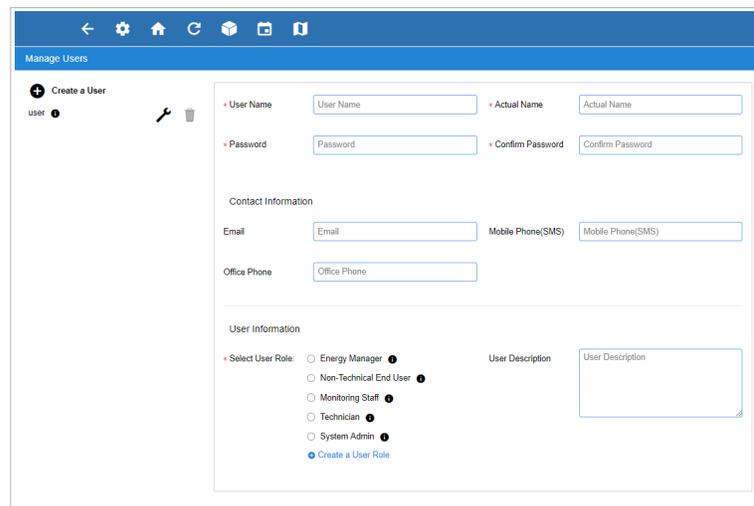


Figure 23 - Add Users

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

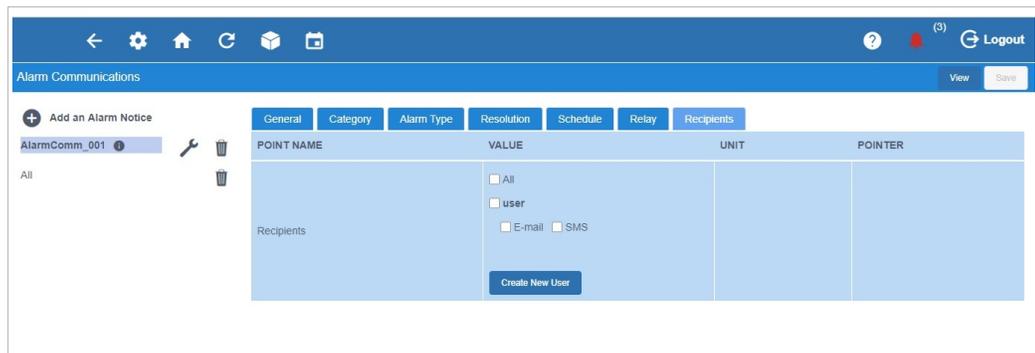


Figure 24 - Add Users Checkbox

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.



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