

ProAct Demand Response

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This document includes the procedures for activating the E2, Site Supervisor, E3 controllers for ProAct Demand Response (DR) web hosted service. These procedures are intended for Technicians who have completed ProAct Connect+ training. Note the procedures do not cover installation of hosted ProAct DR software. Contact your PSC manager for any questions concerning server access and URL address.

1. ProAct Demand Response Service Specification

1.1 Service Definition and Standard Features

ProAct Demand Response is a hosted web service providing customers and/or third party CSP's the ability to schedule, manage, and monitor Demand Response load shedding events across their enterprise stores.

Standard features:

- Fully web browser-based 24x7x365 hosted service.
- Supports TCP/IP connected E2, Site Supervisor, and E3 controllers.
- Integrates with E2, Site Supervisor, and E3's Demand Control Application allowing the shedding of HVAC, Lighting, Refrigeration, and other loads (single shed level only).
- Shed event scheduling and management at Directory and Site levels.
- Near real-time shed event monitoring.
- 3rd Party (for example, CSP) XML kWh pulse data feed.
- Supported EMS Systems: E2 2.72F01 and later.

Additional systems may be available. Contact Product Management for more information.

1.2 Service Activation

Service activation requires customer completion of the following steps:

- Completion of ProAct Services Site Activation form and Shed Schedule form.
- Pre-configured and confirmation of EMS TCP/IP/VPN communications connectivity (*NOTE: Customer Domain Name and Time Server(s) IP or Names is required*).
- Completion of Services Agreement Contract.

1.3 Service Level Deliverables

Web Hosted Service

This service includes the following deliverables:

- Web based 24x7x365 service hosted service (*see Services Agreement for more SLA's*).
- Service activation includes: Users and User Group configuration, Site setup and initial communications confirmation, E2, Site Supervisor, and E3 service activation, E2, Site Supervisor, and E3 applications configuration for shedding per supplied Shed Schedule form (*Note that service activation while technician is at site must be prearranged*).
- Server database daily backups and monthly E2, Site Supervisor, and E3 setpoint file backups.
- Energy data available for 3 years.
- Technical Support.

NOTE: Services do not include any required controllers, communication hardware, installation, or commissioning of hardware.

Disclaimer: Copeland is not responsible for any product loss, harm to people, or property. Due to unreliable nature of modem communications, there is no guarantee that product is always safe. These services are intended as added security only. Information subject to change without notice. Copeland standard Terms and Condition applies.

2. Set Demand Response User Group Privileges

Within the ProAct Demand Response web application, if user groups have not been previously configured, add the new group from the **Admin Tools > Group Manager** menu and set Demand Response user group privileges as shown below and click **Save**.

The screenshot displays the 'Group Configuration' page in the ProAct Demand Response web application. The breadcrumb trail at the top reads: 'Site Directories / Admin Tools / Setup / Group Manager / Group Configuration'.

Group Configuration

- Group Name:** Advanced Demo
- Protocol Access Level:** Advanced (300)

Controller Security

Bypass Controller Security

Protocol	Username	Password
ComTrol Obix	copeland	*****
D	USER	****
E1	USER	****
E1 XML	USER	****
E2	ADVDEMO	****
E2 XML	USER	****
E3	user	*****
Manual XML	USER	****
Reflects Enhanced XML	USER	****
Site Supv	user	****
TAC Xenta 401	USER	****
XWEB Server 300/500	Admin	*****
XWEB Server 3000/5000	Admin	*****
XWEB Server EVO	Admin	*****

Site View Permissions

(A directory is not automatically expanded if all sites under it selected or no site under it selected.)

- Site Directories
 - Demo
 - 100 Kennesaw
 - 152 Lab
 - 154 Atlanta
 - 250 Desk

Privileges

All Privileges

- Add Application
- Backup
- CB Maintenance
- Collect Refrigerant Data
- Commission Demand Response
- Controller Logs and Stats
- Create Precommissioning Setpoint
- Delete Application Instance

Privileges Assigned to this Group

- View Service Provider Exceptions
- Service Provider
- View My Setpoint Exceptions
- Edit Benchmark Setpoints
- Monitor Demand Response
- Send Shed Command
- Manage Shed Commands
- Setpoint Resolution Help Contents

Figure 2-1- Setting Demand Response User Group Privileges

3. Add New Users

If users have not been previously configured, select **User Manager** from the **Admin Tools > User Manager** and then **Add New**. Obtain the user name and email from the **Admin Named User** field located in the ProAct Services Activation form. Configure user as follows, unless directed otherwise:

Login ID	First character of user's first name then last name
New Password	Same as Login ID

Insert first and last name, email address, and assign user to the appropriate user group and click **Save**.

The screenshot displays the 'User Configuration' page within the 'Admin Tools / Setup / User Manager / User Configuration' navigation path. The page is divided into two main sections: 'User Configuration' and 'Units'.

User Configuration: This section contains several input fields and dropdown menus. The fields are: 'Login ID', 'First Name', 'Last Name', 'New Password (case sensitive)', 'E-mail', 'Group Name' (with a search box), and 'User Expiration Type' (set to 'Never Expired'). Below these fields is a 'Preferences' section with four checkboxes: 'Show GS Screen Edit Tool' (unchecked), 'Enable Home Page' (unchecked), 'Hide Nav Frame' (unchecked), and 'Enable GS Screen Auto Log Off' (checked). At the bottom of this section are 'Cancel' and 'Save' buttons.

Units: This section allows for selecting units for various physical quantities. It features three tabs: 'English', 'Metric', and 'Global'. The 'Metric' tab is currently selected. The following table lists the units for each quantity:

Quantity	Unit
Temperature	Fahrenheit (DF)
Temp. Change	Delta Fahrenheit (DDF)
Temp. Rate Change	degrees F/hour (DFH)
Pressure, Large	pound/sq in (PSI)
Pressure, Small	in of water (INW)
Velocity, Air	feet/minute (FPM)
Velocity, Liquid	gallons/minute (GPM)
Liquid Volume	gallons (GAL)
Volume Flow	cubic feet/minute (CFM)
Current	amperes (A)
Light	foot-candles (FTC)
Weight	pounds (LBS)
Enthalpy	Btu/lb

Figure 3-1 - Adding New User

4. Add New Sites

If the site is a new site, from the ProAct DR application (NOTE: Contact manager for the web site address), right-click on the tree and select **Configure > Add Site** at the directory tree level where the new site to be activated for ProAct DR service should reside (NOTE: Customer name is the default level, unless otherwise specified by customer request). Next, complete the site configuration information as provided in the activation form, including Name, Parent Directory, Country, City, State, and Time-zone.

The screenshot displays the 'Site Configuration' form within the ProAct DR application. The left-hand navigation pane shows the 'Site Directories' tree, with the 'Configure' menu open and 'Add Site' selected. The main configuration area contains the following fields and options:

- Name:** Text input field.
- Number:** Text input field.
- Parent Directory:** Dropdown menu set to 'Demo'.
- Address Search:** Text input field with a location pin icon and the text 'Enter your address and autocomplete with Google Maps'.
- Address 1:** Text input field.
- Address 2:** Text input field.
- Country:** Dropdown menu set to 'United States'.
- City:** Text input field.
- State/Province/Region:** Dropdown menu set to 'Alabama'.
- Zip/Postal Code:** Text input field.
- Voice Phone:** Text input field.
- Refrigeration Service Provider:** Dropdown menu.
- Lighting Service Provider:** Dropdown menu.
- HVAC Service Provider:** Dropdown menu.
- Time Zone:** Dropdown menu.
- MSS Site Name:** Dropdown menu with a search icon and the text '(Please get a list of sites at first.)' and a 'Get a List of Sites' button.

'Cancel' and 'Save' buttons are located at the bottom of the form.

Figure 4-1 - Adding Site

5. Add Control System (CS)

Right-click on the new site and select **Configure > Add Control System**. Select the **Protocol type (E2, E3 or Site Supervisor)**, then input the Name (typically the controller model for example, E3 for E3's), IP Address of the gateway controller or device, and Port address (80 for E3 and Site Supervisor, 1025 for E2). Once completed, click **Save** and right-click on **CS** and select **Refresh Units**.

The screenshot displays the 'Control System Configuration' form within the ProAct DR application. The left-hand navigation pane shows the 'Site Directories' tree, with '152 Lab' selected and the 'Configure' menu open, showing 'Add Control System' selected. The main configuration area contains the following fields and options:

- Name:** Text input field.
- Protocol Type:** Dropdown menu set to 'E3'.
- Connection Type:** Radio buttons for 'HTTP' (selected) and 'HTTPS'.
- IP Address:** Text input field with a 'Validate IP Address' checkbox checked.
- Port:** Text input field set to '80'.
- Legacy Client Port:** Text input field set to '1025'.
- Advisory Commissioning Port:** Text input field set to '3001'.
- Obtain Controller Information Now:** Checked checkbox.
- Optional:** A checkbox labeled 'Use this protocol user information for access to the devices at this Control System' is unchecked.

'Cancel' and 'Save' buttons are located at the bottom of the form.

Figure 5-1 - Adding Control System

6. Set User Group Site View Permission

Once the site has been added, set the site view permission by selecting the **Group Manager** menu located under **Admin Tools > Group Manager**.

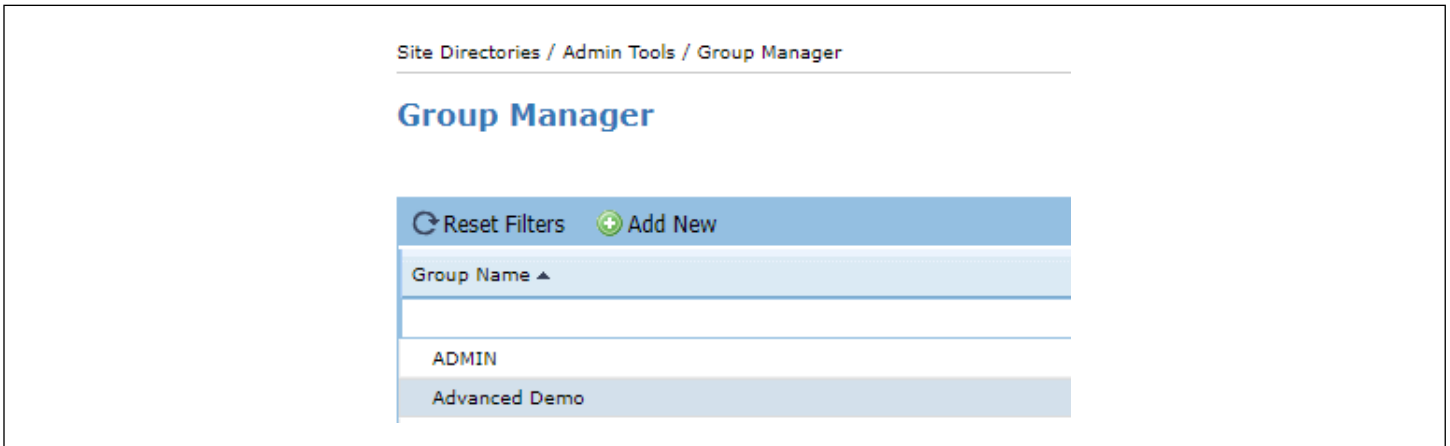


Figure 6-1 - Setting Site View Permission

Select the group name to edit and then select the new site or directory to allow the user group access as shown below.

NOTE: This step must be done after any new sites are added in order for user group to have access to the sites.

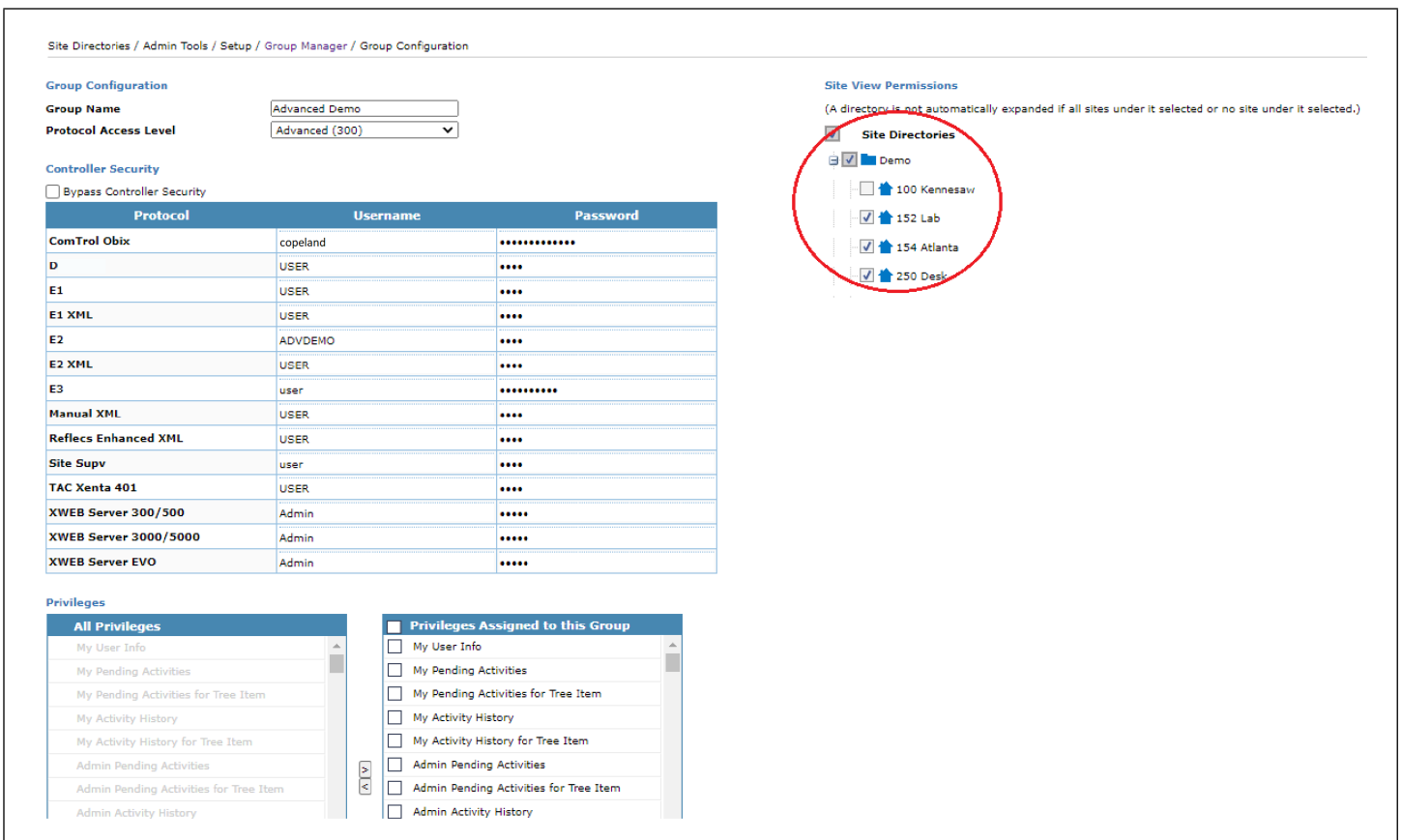


Figure 6-2 - Site Directories

7. Commission Demand Response

Once all the pre-configuration is completed, you can start with your Demand Response actions. Right-click on site and select **Energy > Commission Demand Response**, you will see an activity details screen for preparing to commission demand response.

When you see this screen, the software is now attempting to communicate with controllers at the site to collect information about the current programming of the controllers as it relates to commissioning. This process may take several minutes.

The screenshot shows the Copeland software interface. The left sidebar contains a tree view with '152 Lab' selected, and 'Commission Demand Response' is highlighted in red. The main window displays the 'Preparing to Commission Demand Response' screen with a progress bar at 44%. Below the progress bar is a table with the following data:

Target : Site	Demo > 152 Lab
Started	11/16/21 1:45 PM
Duration	4 seconds
StartMethod	On Demand
User	System Administrator

Below the table is a 'Hide Details' button. A log of operations is displayed below the table:

```
Connected
Connected after 0 second
User Access Operation - Asking Device for access level
User Access Operation - Access was retrieved
Unit Inventory Operation - Getting Application Quantities
Processed 99 features getting application type max instance count
Point Value Retrieval Op - Getting property value for 0 -th point
Unit Inventory Operation - Complete
Backing up date and time.
Completed backing up date and time.
Point Value Retrieval Op - Getting property value for 0 -th point
Point Value Retrieval Op - The operation gets 6 values for total 6 points.
```

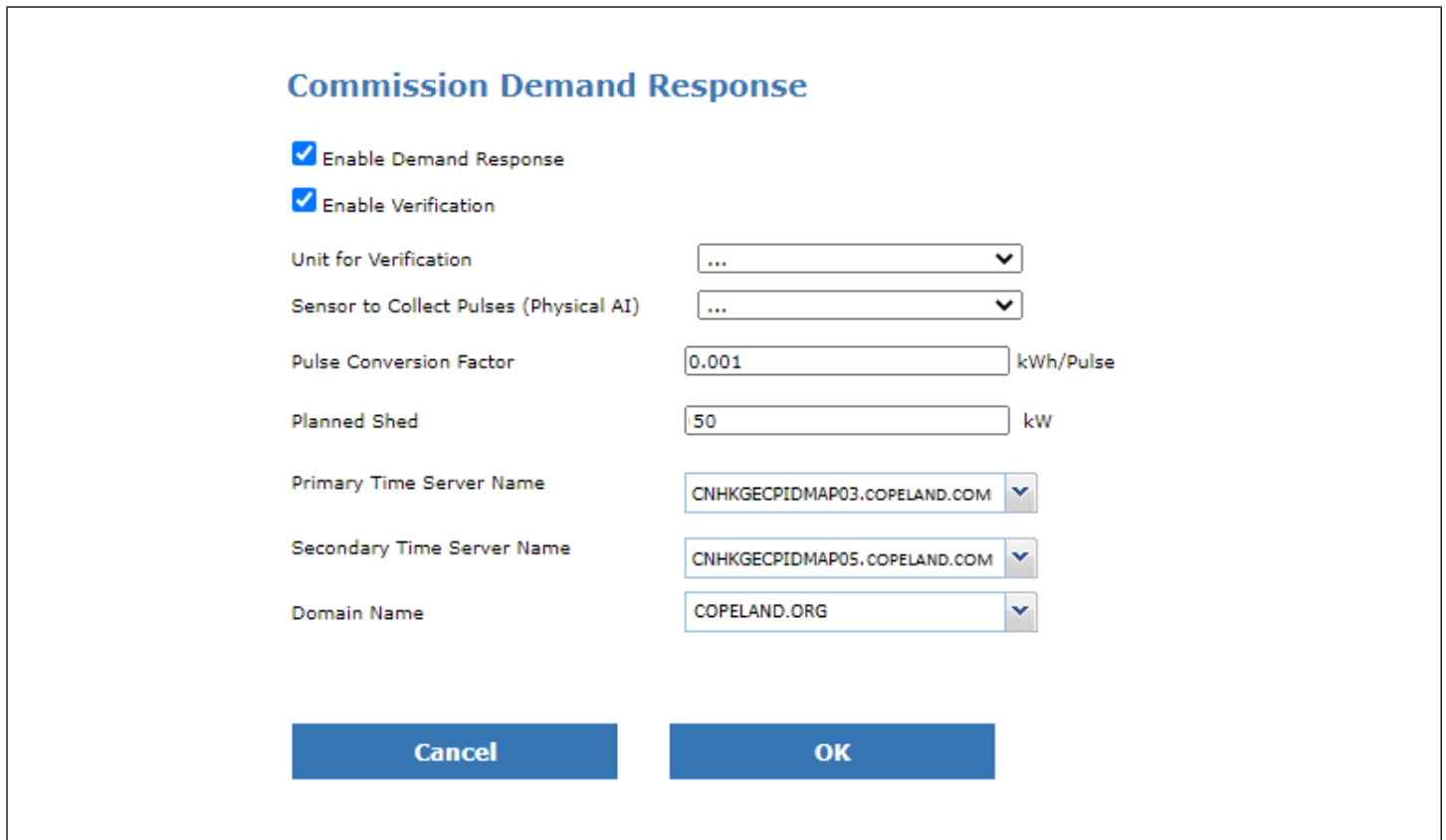
At the bottom of the log is a 'Cancel' button.

Figure 7-1 - Commission Demand Response

If the commissioning activity fails, note the details in the activity window and investigate the issue with your manager. Common failure causes and resolution steps are listed below:

- **Failure to connect to IP**
 - Confirm IP address and port settings.
 - Confirm with IT that VPN is configured and up for customer's sites.
 - Contact manager for additional support.
- **Unsupported controller protocol type or firmware**
 - Confirm the supported protocol type is E2, E3, and Site Supervisor.
 - Consult manager prior to performing controller firmware upgrade to the supported version.

Next, if the commissioning was successful, the following dialog box will display:



The image shows a dialog box titled "Commission Demand Response". It contains two checked checkboxes: "Enable Demand Response" and "Enable Verification". Below these are several input fields: "Unit for Verification" (dropdown menu with "..."), "Sensor to Collect Pulses (Physical AI)" (dropdown menu with "..."), "Pulse Conversion Factor" (text input with "0.001" and unit "kWh/Pulse"), "Planned Shed" (text input with "50" and unit "kW"), "Primary Time Server Name" (dropdown menu with "CNHKGCEPIDMAP03.COPELAND.COM"), "Secondary Time Server Name" (dropdown menu with "CNHKGCEPIDMAP05.COPELAND.COM"), and "Domain Name" (dropdown menu with "COPELAND.ORG"). At the bottom are two buttons: "Cancel" and "OK".

Figure 7-2 - Commission Demand Response Dialog Box

Select the **Enable Demand Response** to enable the service.

The commissioning wizard automates the task of configuring the NTP client in controller. Correct configuration of the NTP client in controller is essential because if the NTP client in controller is not configured correctly, the time in controller may drift and this will cause demand response to malfunction. In the commissioning screen you must enter primary and secondary time server names as shown above.

Connect+ will pre-populate the drop-down lists for the primary and secondary domain servers as a convenience to you. You may however choose to type in free text.

If you are inside a corporate network, the drop-down list will include your primary and secondary domain controllers. If you have entered a value that has worked in the past for another site, the software will remember this value and include it in the list.

If commissioning is going to result in changing the local time of the controller by more than 5 minutes, you will receive a warning message. You may or may not wish to proceed at this point. Changing the local time in the controller can affect lighting and defrost schedules. You may decide that you need to adjust lighting and/or defrost schedules before proceeding. If commissioning is going to result in changing the local time of the controller by more than 5 minutes, below is an example of the warning that you will receive.

Commission Demand Response

Enable Demand Response
 Enable Verification

Unit for Verification: ...
 Sensor to Collect Pulses (Physical AI): ...
 Pulse Conversion Factor: 0.01 kWh/Pulse
 Planned Shed: 0.0 kW

WARNING: Commissioning will change the time on the following units by more than 5 minutes. This will affect all lighting and defrost schedules.

Unit Name	From	To
BX-400 1: HVAC/LTS	2021-11-10 15:43:02	2021-11-10 15:50:14

Primary Time Server Name: 10.28.64.12
 Secondary Time Server Name: 10.28.64.12
 Domain Name: COPELAND.COM

Figure 7-3 - Commission Demand Response Warning Message

If the site is designated to have shed event monitoring (only E2 supports this function), select the **Enable Verification** and the unit and **AI sensor/pulse meter** to be used for verifying the shed events from the drop-down boxes. The **Pulse Conversion Factor** should be set to 0.001 kWh/pulse. If a sensor for the main meter pulses is not listed or defined, one will need to be created by the technician responsible for the programming of the E2. (Contact technical support for any questions).

After entering all required information, click the **OK** button. The system will start the activity to configure the controller and web application. This may take several minutes. During this process if the controller had never been commissioned for DR, new Flexible Combiners named with DEMANDRESPONSE will be added to each controller.

Right-click on **Demand Response**, then select **Activities > Refresh Point List** to obtain the point information.

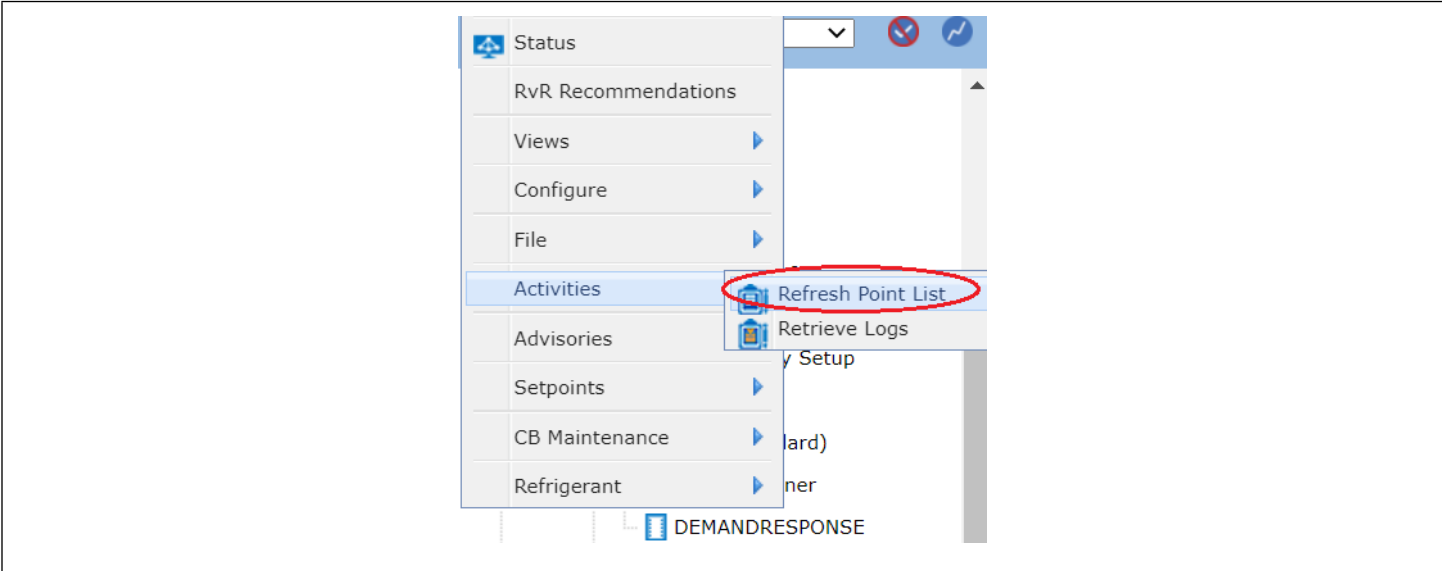


Figure 7-4 - Refresh Point List

8. Configure Applications for Shedding

Applications are configured for shedding by mapping the Demand Response Flexible Combiner Digital Output 1 to the Primary Demand Shed property within the controller applications. A customer supplied Shed Schedule form (see screenshot below) list the applications to be configured for shedding. Configuration of shed applications can be completed through use of either the controller front panel, UltraSite, or Terminal Mode/Edit Application from Connect+. The ProAct DR web application method is demonstrated below.

Select **Edit Application** for the application to be configured for shedding.

The screenshot displays the 'Demand Response Service Shed Schedule' form and the 'Edit Application' configuration interface. The form lists applications to be shed during a Demand Response event, including application long name, board and point, shed mode, and estimated kW of load being shed.

Shed Number	Store Number	E2 Application Name	Board and Point	Shed Mode (Off, Stpt Shift deg's)	kW Shed (est.)
1	2389	Sales A	2.2	Off	4.4 kW
2	2389	Case Lts	2.4	Off	9.8 kW
3	2389	Wall Wash	4.3	Off	2.4 kW
4	2389	50% Cans A	4.5	Off	5.5 kW
5	2389	AH 1 Cool 1	1.1	5 degF Higher	
6	2389	AH 1 Cool 2	1.2	5 degF Higher	
7	2389	AHU 1 Run	1.5	5 degF Higher	

The 'Edit Application' configuration shows the 'Power' tab selected. The 'Pri Demand Shed' property is set to 'E2 Unit04:DEMANDRESPONSE:DO1'. The 'Pointer Configuration [PRI DEMAND SHED]' dialog box is open, showing the following settings:

- Area Controller: HVAC/LTS
- Application Type: Flexible Combiner
- Application: DEMANDRESPONSE
- Point: DO1

Figure 8-1 - Application for Shedding

For AHU shedding, as in this example, select the **Power** tab, then select the **Pointer Setup** for the **Pri Demand Shed** and select the controller being configured, and then the application named **Flexible Combiner, Demand Response** and the output **DO1**. Next, set the **Pri Demand Bump** property to the specified number of degrees (5.00 in the screen above), as provided in the Shed Schedule form. Click **OK** to save the settings for both the **Pointer Setup** and **Edit Configuration** dialog boxes.

Repeat the same process when configuring a Lighting application as shown below; however, select the **Input** tab. No bump setpoint is required for lighting applications.

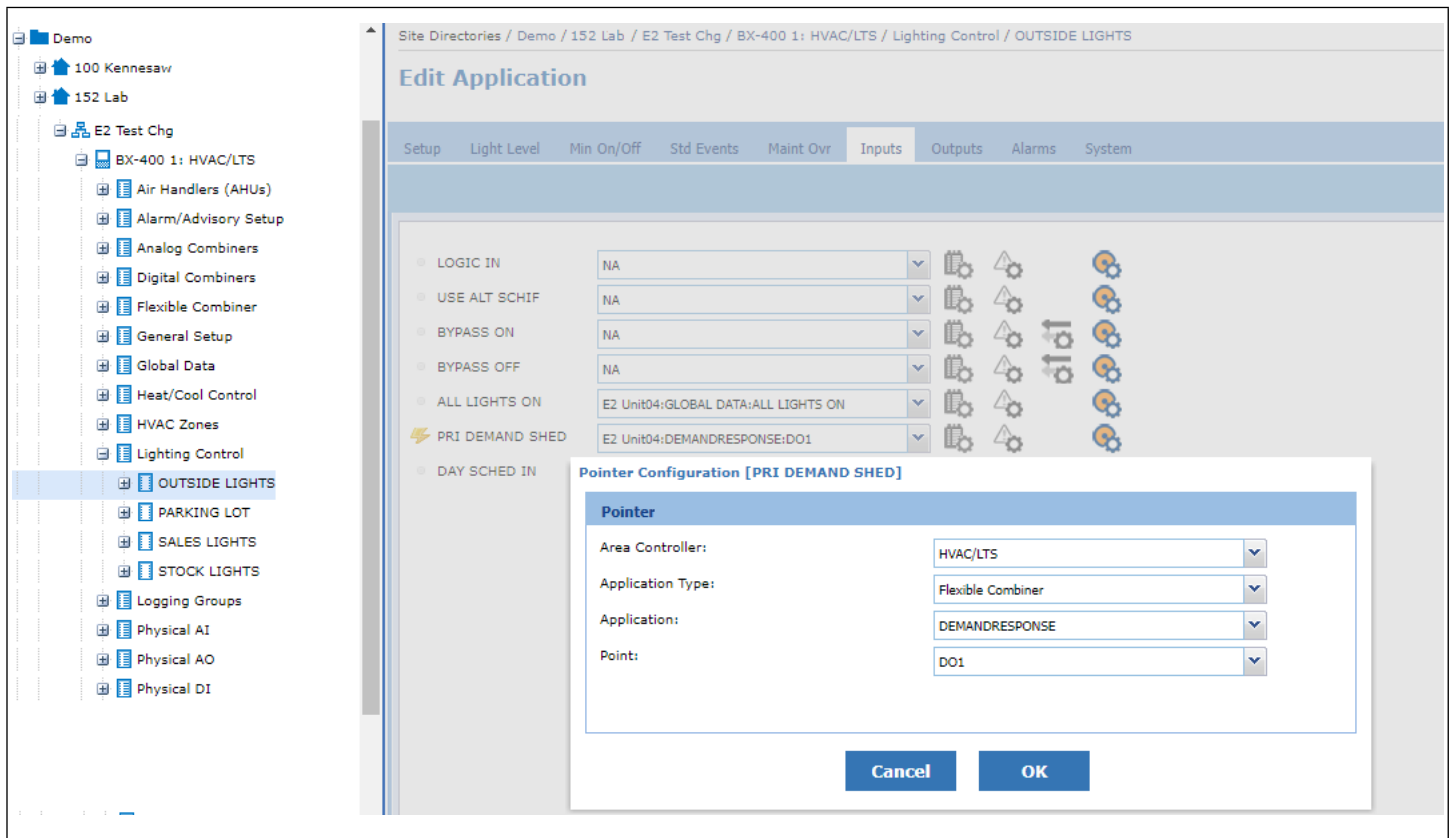


Figure 8-2 - Pointer Configuration Setup

Once all applications have been configured, users can schedule a shed event to verify all loads shed accordingly. If any failures occur during the scheduling of a shed event, consult your PSC manager.

Several applications including Lighting, Suction Groups, Condensers, and Air Handler applications have demand shed inputs that implement built-in demand shed behaviors. Consult a controller for the exact behavior of these.

9. Send Shed Command

Once the Commission Demand Response is completed, you can send the shed command to controller. Right-click the site and select **Send Shed Command**.

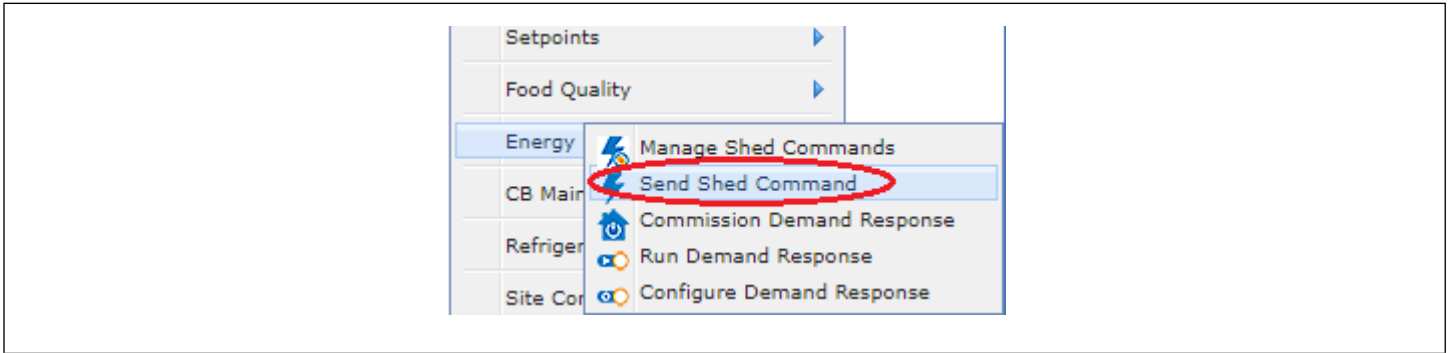


Figure 9-1 - Send Shed Command

Select a start and end date and time, then click **Send Shed Command**.

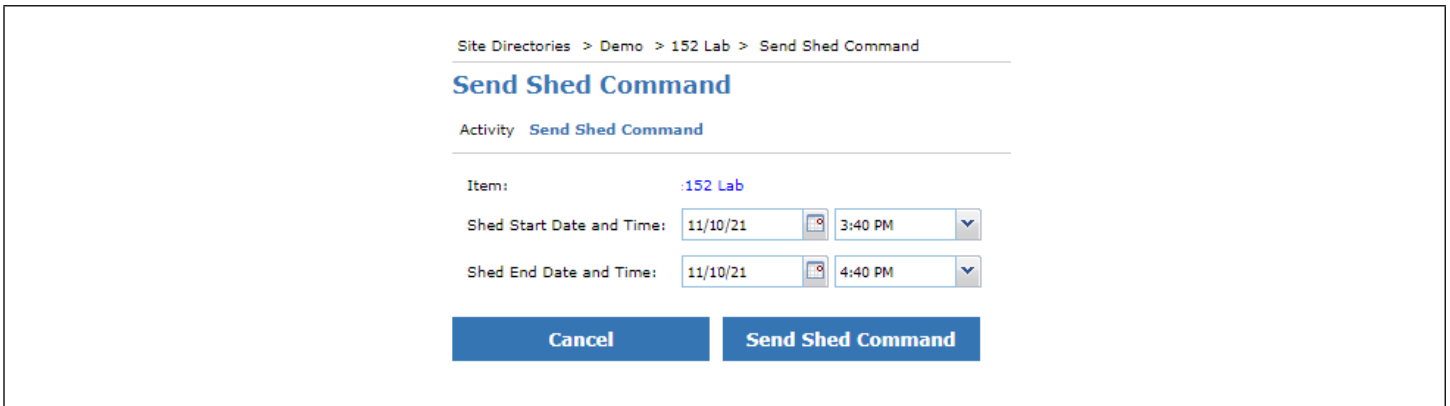


Figure 9-2 - Send Shed Command Option

If there are not any existing shed commands ahead of the command you sent that are already in the controller, you will see an activity details screen that displays the status of sending the shed command to the controller as depicted below:

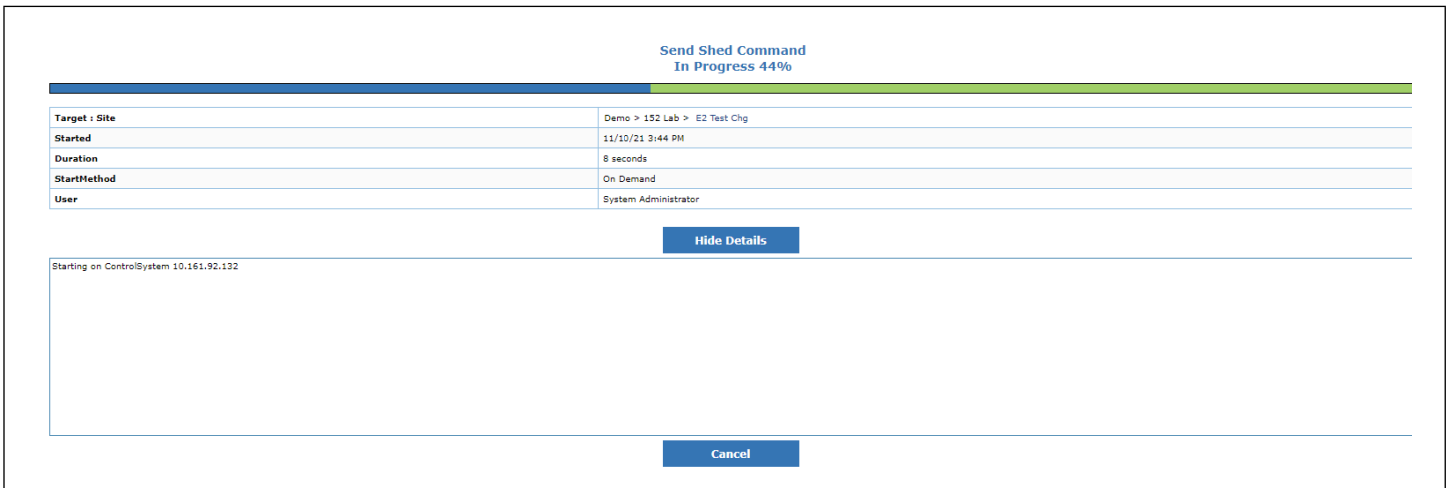


Figure 9-3 - Send Shed Command Status

When the activity is completed, you will see the message of the next step link. Click each link to go to the next step page.

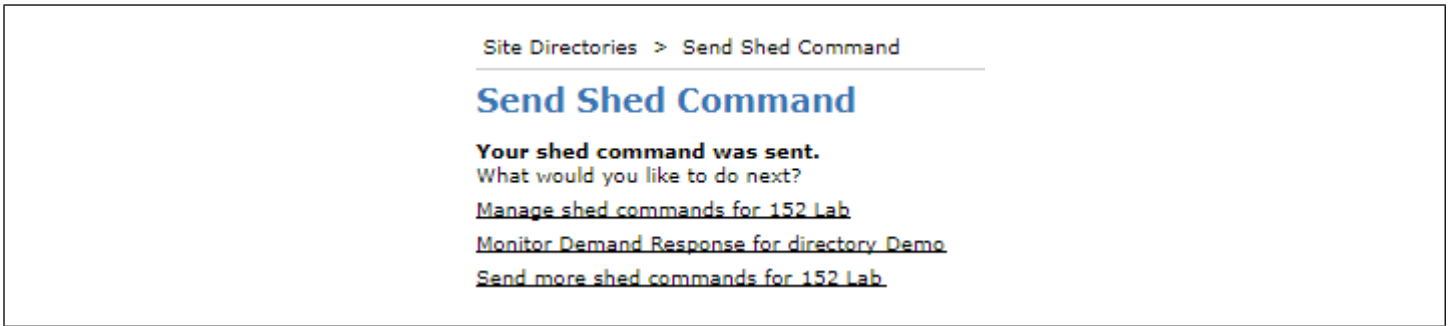


Figure 9-4 - Send Shed Command Links

If there are existing shed commands and the current shed time has overlapped with the command you already sent, you will see a setup wizard and can choose the action you want.

Merge: Merge the overlapping shed times

Overwrite: Cancel the existing shed time and use the time that just entered.

Keep: Ignore the time that just entered and keep the existing shed time.



Figure 9-5 - Send Shed Command

Hover your mouse on the button for a preview of tips.

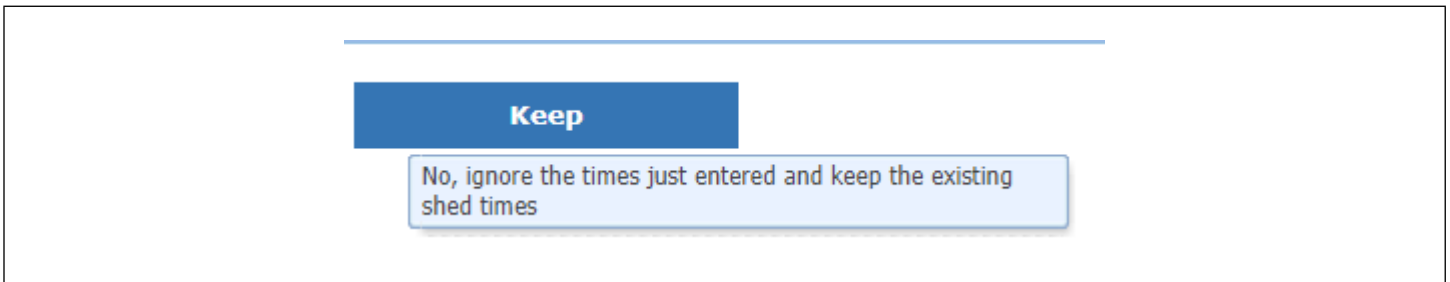


Figure 9-6 - Send Shed Command Prompt

10. Manage Demand Response

After sending a shed command, you can right-click on the directory or site level, select **Energy > Manage Shed Commands** to view the shed command management.

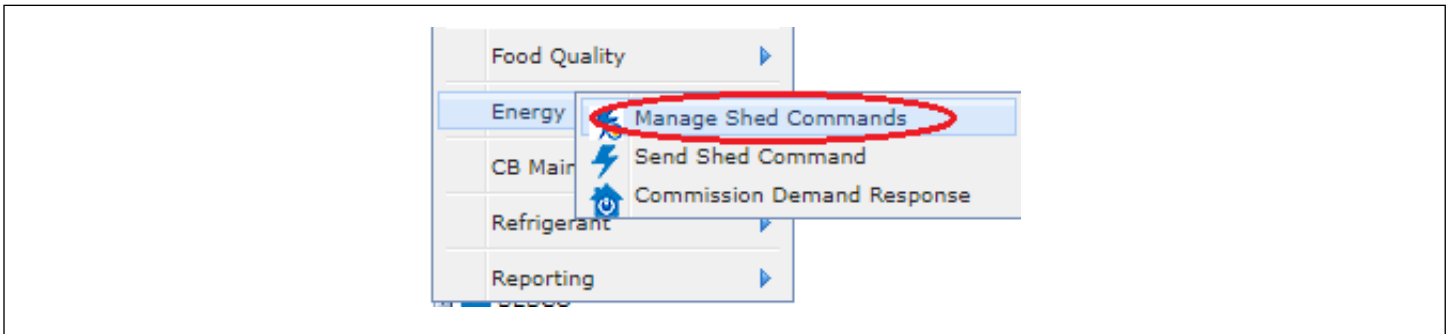
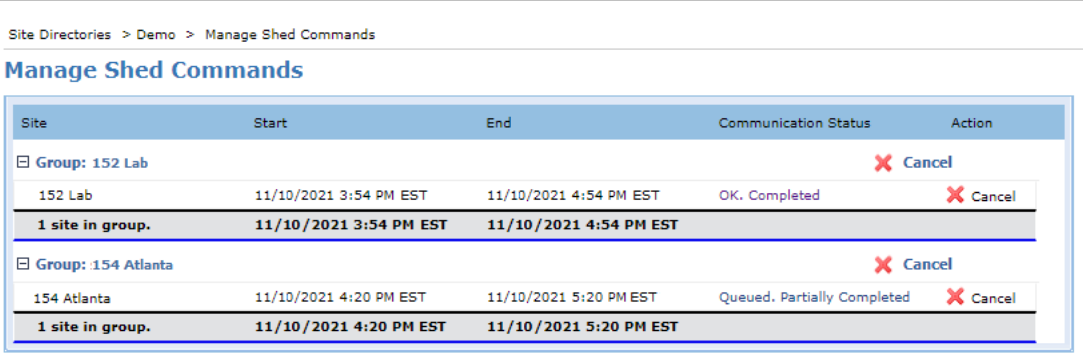


Figure 10-1 - Manage Shed Command

You can utilize this to quickly view the site shed time and find sites that failed to communicate and did not receive the command.



Site Directories > Demo > Manage Shed Commands

Manage Shed Commands

Site	Start	End	Communication Status	Action
[-] Group: 152 Lab				✖ Cancel
152 Lab	11/10/2021 3:54 PM EST	11/10/2021 4:54 PM EST	OK, Completed	✖ Cancel
1 site in group.		11/10/2021 3:54 PM EST	11/10/2021 4:54 PM EST	
[-] Group: 154 Atlanta				✖ Cancel
154 Atlanta	11/10/2021 4:20 PM EST	11/10/2021 5:20 PM EST	Queued, Partially Completed	✖ Cancel
1 site in group.		11/10/2021 4:20 PM EST	11/10/2021 5:20 PM EST	

Figure 10-2 - Manage Shed Command

If Connect+ fails to communicate with a site to send a shed command, Connect+ will continue to retry the command to failed sites for the life of the event. The software implements this retry cycle on a 5-minute interval. The Manage Shed page will update if the communication status of a site changes as a result of this retry mechanism.

You can also cancel the events in this page by clicking the **Cancel** icon for each event or group. After canceling, Connect+ will communicate with the controller and clear the command in the controller.

This is a useful feature because if the power company ends the event early, you can resume normal operations, or if a particular store manager is reporting incidents about the impact of an event, you can cancel the event for this store.

11. Monitor Demand Response

User could access the Demand Response Monitor data grid via web browser to view:

- Real-time event statuses.
- Past and upcoming shed event schedules.
- Amount of power shed per site.
- Directory summary data.

As mentioned in **Section 7 - Commission Demand Response**, user should enable **Enable Verification** checkbox and configure the properties in Commission Demand Response page, then right-click on directory level and select **Energy > Monitor Demand Response**.

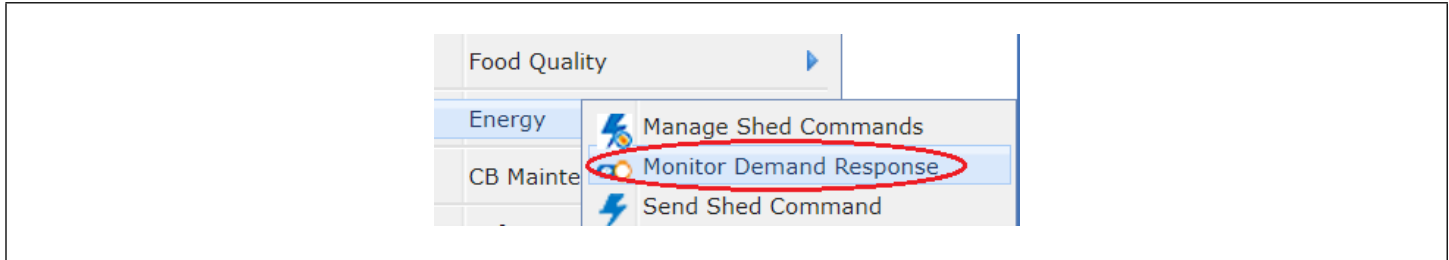


Figure 11-1 - Monitor Demand Response

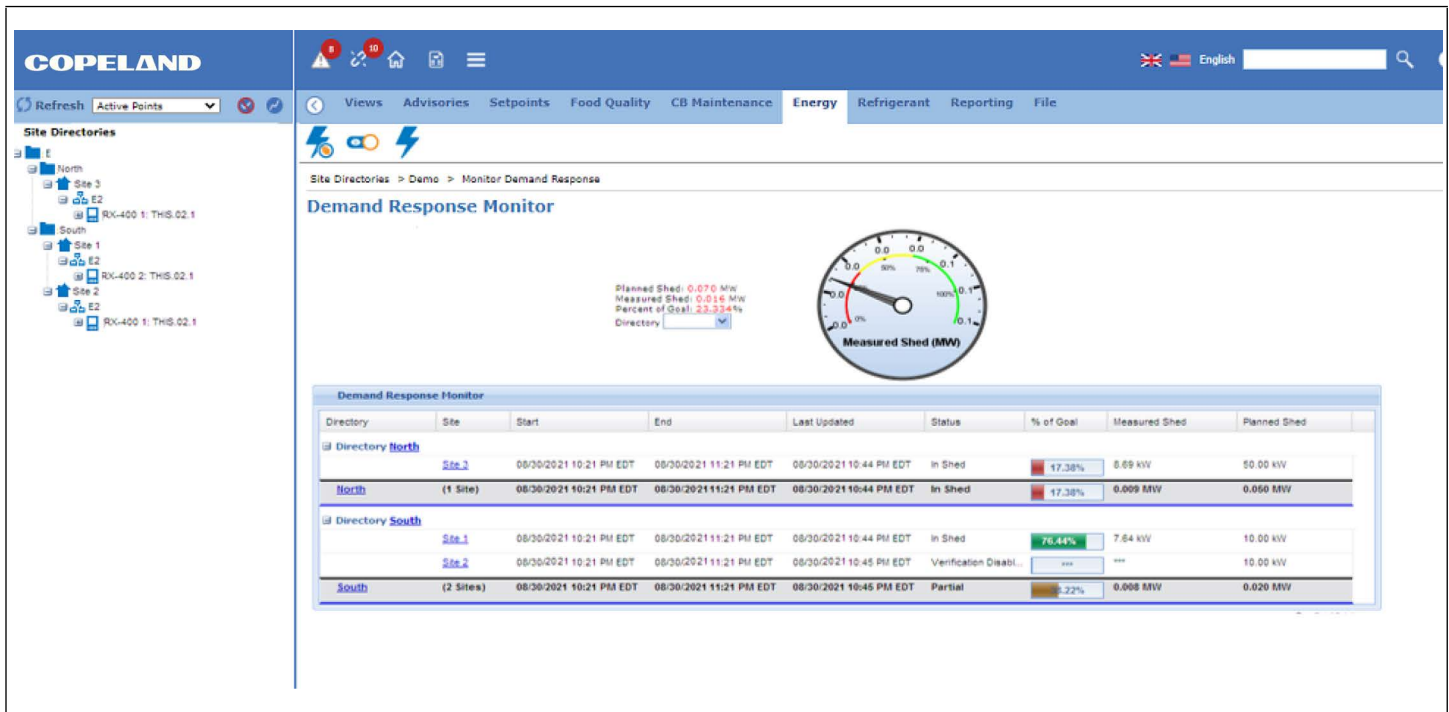


Figure 11-2 - Demand Response Monitor

In this page, you could see a total Planned Shed, Measured Shed, Percent of Goal of the selected directory. A dial that also gives you an intuitive view of Percent of Goal. If the percent of goal is less than 33%, the dial pointer will display in red area, if the percent of goal is between 33% and 66%, it will show in yellow area, and the pointer will display in green if the goal is more than 66%.

The table will show Planned Shed, Measured Shed, and Percent of Goal of each site under the directory. The color that displays for the (percent) **% of Goal** has the same meaning as the dial.

Currently, Monitor Demand Response is only available for E2.

12. Communications Test Scheduling

To ensure communications between the Connect+ and controller, you can configure a nightly communications test schedule within the Schedule Manager for all activated sites using the **Refresh Point List** schedule type.

NOTE: Contact your IT Department and Manager to confirm no schedule conflicts with any server nightly maintenance tasks.

Name schedule for each site as follows:

URGENT! Demand Response Comm. Test Failed

The screenshot shows the 'Schedule Manager' interface. On the left, there is a 'Site Directories' sidebar with a tree view containing 'Demo', '100 Kennesaw', '152 Lab', '154 Atlanta', and '250 Desk'. The main area is titled 'Schedule Manager' and includes a breadcrumb 'Site Directories / Activities / Schedule Manager'. Below the title, it states 'All schedules are based on the server's time zone: (GMT -05:00) Eastern Standard Time - America/New_York (EST) (DST)'. There are two radio buttons: 'Run Now' (unselected) and 'Run On Schedule' (selected). Under 'Details', 'Enabled' is checked, 'Name' is 'URGENT! Demand Response Com', and 'Type' is 'Refresh Point List'. The 'Schedule' section shows 'Every Day At 6:00 AM - (GMT -05:00) Eastern Standard Time - America/New_York (EST) (DST)'. It has radio buttons for 'Run Once', 'Interval Based', and 'Calendar Based' (selected). 'Start Date/Time' is '11/09/21 6:00 PM' and 'End Date/Time' is empty. Below are radio buttons for 'Every Day' (selected), 'Days of Week', and 'Days of Month'. There are 'Hours' and 'Minutes' selection grids. At the bottom right, there are two 'All' buttons and two 'Clear' buttons.

Figure 12-1 - Schedule Manager Screen

Select site directory as one of the site's E2 Demand Response Flexible Combiners, as shown below. Assign **On Unsuccessful** notifications to all named users and PSC responsible.

The screenshot shows the 'Notification' configuration screen. The 'Notification' section has 'On Success' (unchecked) and 'On Unsuccessful' (checked) options, with an 'Email Format' dropdown set to 'Html'. Below this is a 'Users' list with checkboxes and 'via email' labels for 'ENGAdmin (Engineering Admin)', 'AClark (Audrey Clark)', 'administrator (System Administrator)', 'Advanced.Services (Advanced Services)', and 'advdemo (Advance Demo)'. To the right is an 'Additional Email Addresses (comma separated)' text area. The 'Configuration' section shows a tree view of 'Site Directories' with 'Demo' expanded to show '100 Kennesaw', '152 Lab', '154 Atlanta', and 'E2 Test Chg'. Under 'E2 Test Chg', there are sub-items: 'BK-400 1: HVAC/LTS', 'Air Handlers (AHUs)', 'Alarm/Advisory Setup', 'Analog Combiners', and 'Flexible Combiner'. At the bottom, a 'DEMANDRESPONSE' button is highlighted.

Figure 12-2 - Notification Screen

13. Backup Scheduling

Configure a Backup schedule within Schedule Manager for all activated sites by reselecting the directory or site(s). Select email notification on unsuccessful attempts, as shown below.

NOTE: Contact your IT Department or manager to confirm no schedule conflicts with any server nightly maintenance tasks.

The screenshot displays the Copeland Schedule Manager interface. The left sidebar shows a tree view of Site Directories under a 'Demo' folder, including 100 Kennesaw, 152 Lab, 154 Atlanta, and 250 Desk. The main content area is titled 'Schedule Manager' and shows the configuration for a backup schedule. The schedule is set to 'Run On Schedule' and is 'Enabled'. The name is 'DR Backup' and the type is 'Backup'. The schedule is 'Calendar Based' and runs 'On the 1st Of Every Month At 4:00 AM - (GMT -05:00) Eastern Standard Time - America/New_York (EST) (DST)'. The start date is 11/09/21 at 6:00 PM. The schedule is configured for 'Days of Month' with '1' selected. The notification settings are 'On Success' and 'On Unsuccessful'. The configuration shows the site directory 'Demo' selected.

COPELAND

Refresh Active Points

Views Advisories Setpoints CB Maintenance Refrigerant File

Site Directories / Activities / Schedule Manager

Schedule Manager

All schedules are based on the server's time zone: (GMT -05:00) Eastern Standard Time - America/New_York (EST) (DST)

Run Now Run On Schedule

Details

Enabled:

Name:

Type:

Schedule

On the 1st Of Every Month At 4:00 AM - (GMT -05:00) Eastern Standard Time - America/New_York (EST) (DST)

Run Once Interval Based Calendar Based

Start Date/Time:

End Date/Time:

Every Day Days of Week Days of Month

Months

Days of Month

Hours

Minutes

Notification

On Success On Unsuccessful

Configuration

Site Directories

Figure 13-1 - Backup Scheduling

14. Communication Failure Investigation

Upon receipt of a DR communication test fail email as shown in the sample below, the following steps should be taken to determine if the problem is on Copeland's network side or the customers.

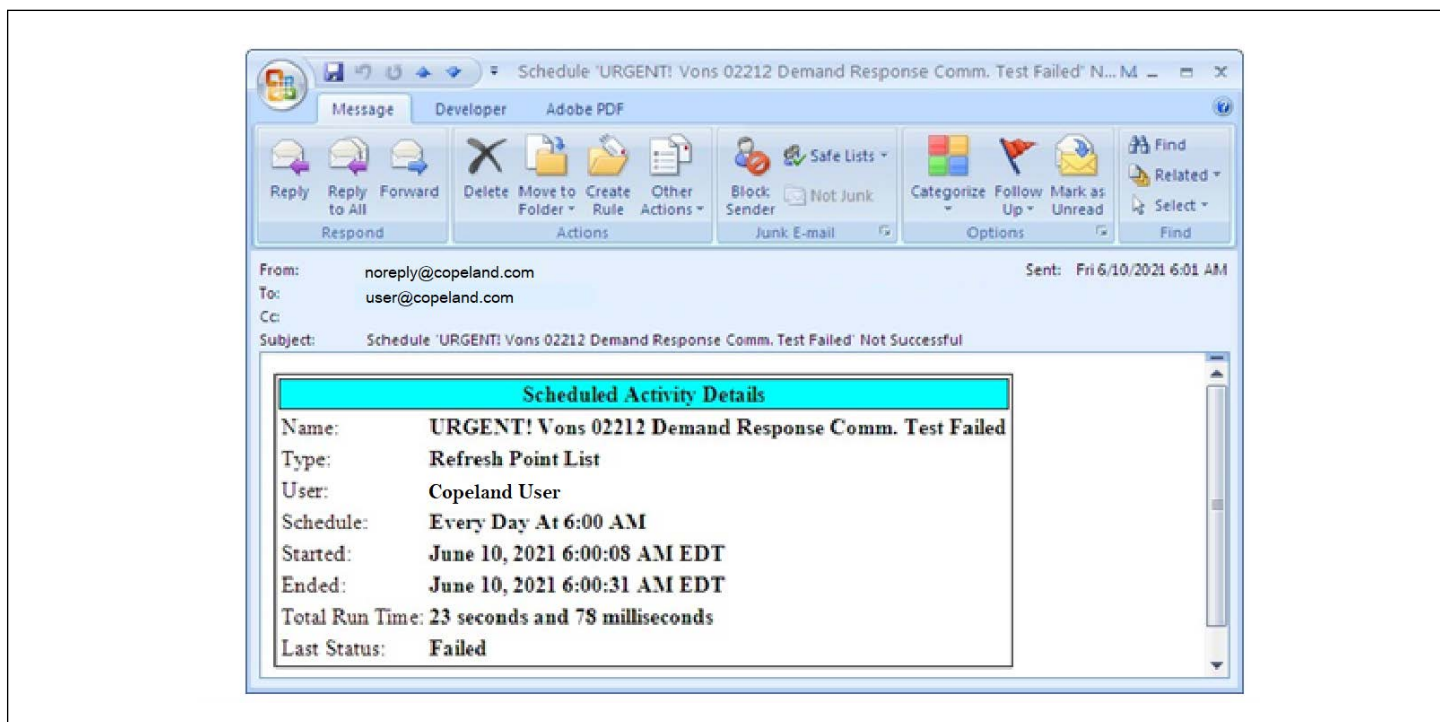


Figure 14-1 - Schedule Activity Details Screen

Communication Failure Investigation Procedures

1. Attempt a Refresh Units job on the failed site in the DR web application.
2. If the job shows **Completed**, notify all recipients on failure notice email of resolution.
3. If the job fails, perform Refresh Units on another site to test VPN.
4. If the other site is successful, notify all recipients on the failure notice email that the Copeland side VPN test was successful, and the problem may be on the customer's network side or with a component at the store.
5. If the other site is unsuccessful, notify all recipients on the failure notice email that the problem may be on the Copeland network side and the problem is currently being addressed. Provide a status update email within the next hour.
 - a. Escalate problem to Copeland IT Help Desk as Emergency.

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