EasyIO Neo Series System Supervisor (ES) User Guide

ES

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Contents

Introduction

The EasyIO Neo Series System Supervisor (ES) application manages the collection and presentation of large amounts of data. The ES includes trend data, event messages, operator transactions, and system configuration data. The ES monitoring software runs on personal computers or server operating systems to provide extended historical archiving and reporting capabilities.

Logging on to the System Supervisor (ES)

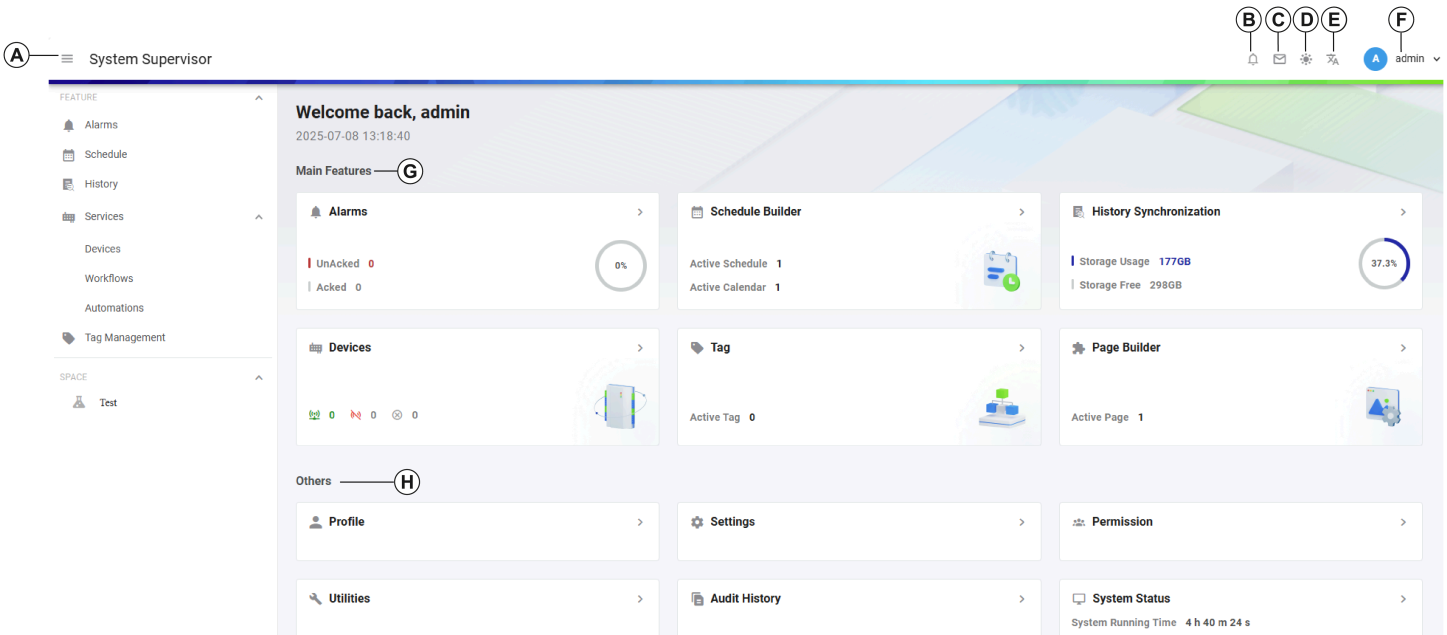
1. Open the ES app in one of the following ways:
   - Double-click the ES app icon on the desktop.
   - Go to the **Start** menu and browse to the ES app.
   - Enter `ES` in the search bar and click **Open**.
   - Click a bookmark to the application that you previously saved in a web browser.
2. Enter your user name and password.
3. Click **Login**.

   Note:
   - If you do not remember your admin account password, click **Forgot Password** to reset your password. Answer the security questions and click **Save**.
   - The first time you log on, the application prompts you to change your password. The password length must be between 12 and 32 characters and contain both uppercase and lowercase characters, numbers, and special symbols. See Changing the password. Log on again with the updated password and set your password protection questions and click **Save**.
   - The system prompts you to add a device if you do not have any devices. Click **OK** and see Adding devices.

Using the Home page

The Home page shows the main features and settings of the system.

Figure 1: Home page



Callout	Component	Description
A	Menu icon	Click the **Menu** icon to show or hide the navigation menu for **Feature** and **Space** options.
B	Alarms icon	Click the **Alarms** icon to open the Alarms page. See Managing alarms.
C	Message icon	Click the **Message** icon to view a list of messages for activity in the system.
D	Preferences icon	Click the **Preferences** icon and click the theme to use. • **Light**: Use the light theme for both the navigation menu and the pages. • **Dark**: Use the dark theme for both the navigation menu and the pages.
E	Translations icon	You can choose any of the following languages for the user interface: • English • Chinese • Spanish • Italian • French
F	Admin icon	• Click **Profile** to view and edit account information. See Logging on with the new account. • Click **Logout** to log off the current account. See Logging on to the System Supervisor (ES).

Callout	Component	Description
G	Main features	Click one of the main features to open the corresponding page.
H	Other features	Click one of the other features to open the corresponding page.

To use the main and other features:

1. In the **Main Features** section, click one of the features to open the corresponding page.
    - Click **Alarms** to open the Alarms page. See Managing alarms.
    - Click **Schedule Builder** to open the Schedule Builder page. See Configuring schedules using the Schedule Builder.
    - Click **History Synchronization** to open the History Synchronous Configuration page. See Managing historical information.
    - Click **Devices** to open the Device Management page. See Managing devices.
    - Click **Tag** to open the Tag Management page. See Configuring tags.
    - Click **Page Builder** to open the Page Builder page.
2. In the **Others** section, click one of the features to open the corresponding page.
    - Click **Profile** to open the Profile Management page to view and edit account information. See Logging on with the new account.
    - Click **Settings** to open the Settings page. See Configuring system settings.
    - Click **Permission** to open the Account Management page. See Managing permissions.
    - Click **Utilities** to open the Utilities page. See Using the utilities.
    - Click **Audit History** to open the Audit History page. See Viewing audit history.
    - Click **System Status** to open the System Status page. See Viewing system status.

Configuring services

To configure services, see the following tasks:

- Managing devices
- Creating a workflow
- Automating actions

Managing devices

To manage devices, see the following tasks:

- Adding devices
- Editing a device
- Deleting a device
- Creating a device tunnel
- Searching for a device
- Importing and exporting device data to CSV

Adding devices

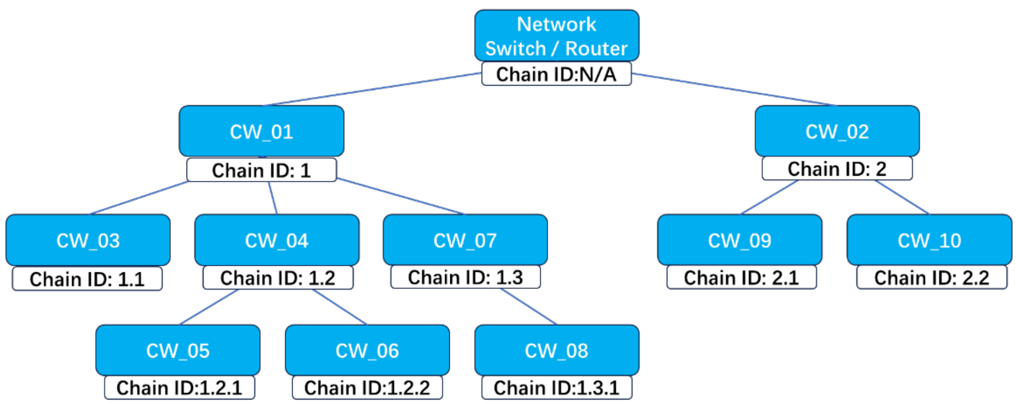
1. Go to the Devices screen.
2. Click **New** to add devices.
3. In the **Batch Name From** field, enter the device name.
4. In the **Type** drop-down menu, select the device type of EC or CW to match your EC or CW series controller.

5. In the **IP Address From** field, enter the start IP address of the devices to add in batches.
6. Enter the number of devices to add in the **Add Count** field. When this value equals 2 or more, the device number appends to the batch name. For example, a batch name of `test` creates the two controller names of `test-1` and `test-2`.
7. In the **Description** field, enter a description of the device.
8. In the **Password** field, enter the password of the log on controller. The default password of the **admin** account is **helloQwert4u***.
9. In the **Device Keywords** field, enter a custom label of the device, such as **air conditioner**, **lighting**, or **ventilation** to later use to filter or search for devices.
10. In the **Daisy Chain Config** > **Chain ID** field, enter the ID to set the order of the workflow to run automatically.

    As shown in the following example of a star network, the chain ID for `CW_01` directly connected to the network switch or router is `1`. The ID for the next controller at the same level increases by 1. For example, the chain ID of `CW_02` is `2` and connects to `CW_01`. When the controller chain ID is 1.1, the next controller of the same level is 1.2. The controllers of other levels increase according to the network architecture level.

    Note: You have the option to set up a Chain ID, ensure that it is appropriate for the work flow order that you require.

Figure 2: Daisy chain start network example



11. Click **Save** to save all the configurations.

Creating a device tunnel

1. Select the device and click **Operate**.
2. Click **Create Device Tunnel** and wait for the process to complete. The Live Status column displays `Online`. The screen shows a message stating `Depending on the number of selected devices, it may take several minutes to run`.
3. After the deployment completes, click the **Refresh** button to display the latest device status information.
    - Click the status value in the **Live Status** column to check the online and offline history of a device.
    - Click the device name to open the manifest information page.
    - Click the **Jump to tag** icon to open the tag management page of the device.

    Note: It is important to create a device tunnel to ensure that your device comes online.

Editing a device

1. Go to the Devices screen.
2. Click the **Edit** icon from the **Operate** column to edit a device.

3. Edit the device settings. See Adding devices for more information on the settings.
4. Click **Save**.

Deleting a device

- Select the device to delete and click **Operate** > **Delete**.

Searching for a device

1. Click the **Display Bar Settings** button on the right side of the device search bar and select the information to display in the columns of the Device Management screen.
   - Name
   - ID
   - Type
   - IP Address
   - Chain ID
   - Login User
   - Description
   - Label Keywords
   - Live Status
   - Actions Operate
2. Enter the search criteria in the search bar, and the system filters the displayed columns.

Importing and exporting device data to CSV

You can use CSV files to process devices in batches and use Excel or other document editing software to add devices offline.

After you import the CSV file, create a device tunnel for the device. See Creating a device tunnel.

Creating a workflow

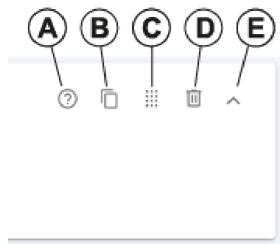
Before you begin:
A workflow is a collection of user-defined tasks that run in batches sequentially. All tasks in the workflow connect by their outputs and inputs. For example, the output of one task is the input of the next task. Store workflow files under the workflow folder: `data/workflows`.

1. Click **New**.
2. Enter a name for the workflow.
3. Click **Add Task** and select the type of task to add. You can click the question mark icon in the task window to see the details of each task.
4. Repeat Step 3 to add more tasks to the workflow.
5. Click **Validate**.
   - If no problems exist, a message in green color displays stating `All look good`.
   - If there is an invalid value, a warning message displays stating `Please fix errors before continue`
6. Click the chevron icon to expand or collapse the task details.
7. Click **Save** to save the workflow and return to the Workflow Management screen.

Configuring a task

1. When you configure tasks in a workflow, use the following information to copy, reorder, or delete tasks.

Figure 3: Edit task buttons



Callout	Name	Description
A	Help	Opens the documentation that contains detailed instructions for each task and how to use batch processing.
B	Clone	Clones the task.
C	Reorder	Enables drag functionality to change the order of the tasks.
D	Delete	Deletes the task.
E	Expand/Collapse	Expands or collapses the task details view.

2. To upload a firmware file, click the **Folder** button.
3. Drag and drop the files or folders to upload or click to select a file and then click the **Upload** button to upload the files.
4. Click **Close** and go back to the Flash Firmware screen.
5. Click the **Refresh** button, and select the uploaded file or the linked folder from the Firmware File menu.

Deleting a workflow

1. Select the workflow to delete.
2. Click the trash can icon associated with the workflow.

Automating actions

To create a new automation:

1. Go to the Automation Management screen and click **New**.
2. Enter a name and description.
3. Select a previously created workflow and worker number.
4. Click **Add**.
5. Select the device and click **OK**.
6. Click **Edit** and edit the device, if needed. See Adding devices for more information on these settings.

   Note: Do not enter a **Chain ID** if you do not have a daisy chain device configuration.

7. Click **Save**.
8. Click **Save** and return to the Automation Management screen.
9. When the Status column shows `Ready`, click **Actions** > **Start** to start the automation.
10. Click the **Logs** icon to see the log file.
11. Sort, filter, and refresh the log file:
    - Click **Log Level** to filter the log level by Critical, Error, Warning, Notice, Info, or Debug.

- Click **Reversed Order** to sort the logs in reverse order.
- Click **Auto Refresh** to automatically refresh the logs.
- Click **Refresh** to manually refresh the logs.

Managing alarms

Use the ES as a central alarm monitoring platform to collect and manage alarms from the controller. You can view new alarms from the Alarm notification bar that appears at the top of each page and click **Go to Alarms**.

Design the applications in the controller to send alarms to ES when they generate an alarm, and install the **jciECAlarm**, or **jciCWAlarm**, component on the EC or CW controller. For more information, refer to *Neo Series EC Controllers Sedona Kits Technical Bulletin LIT-12014475* or *EasyIO Neo Series CW Controller User Guide LIT-12014483*.

Acknowledging alarms

Go to the Active Alarms tab and acknowledge alarms using the following methods:

- Select one or more alarm entries and click **Ack** > **Acknowledge Selected**.
- For alarms with the same path, click the **Acknowledge** icon in the **Operate** column to acknowledge all unacknowledged alarms in the alarm group.
- Double-click an alarm entry to open the alarm details list, and then click the **Acknowledge** icon in the **Operate** column to confirm the alarms individually.

Commenting on Alarms

Go to the Active Alarms tab and comment on alarms using the following methods:

- For the same UUID, click the **Comment** icon in the **Operate** column to add a comment to the alarm group.
- Double-click an alarm entry to open the alarm details list. Click the **Comment Box** icon in the **Operate** column to add comments to the alarms individually.

Deleting alarms

Go to the History Alarms tab and delete alarms using the following methods:

- Select one or more alarm entries and click **Delete** > **Delete Selected**.
- For alarms with the same path, click the **Delete** icon in the **Operate** column to delete the alarm group.
- Double-click an alarm entry to open the alarm details list, and then click the **Delete** icon in the **Operate** column to delete the alarms individually.

Displaying alarms

You can customize the display of alarms by clicking the filter icon in the **Alarms** feature.

Sorting alarms

Click the **Priority**, **Alarm Date**, and **Severity** fields to sort the alarms by a specific priority. The number next to the field name indicates the priority level.

Finding alarms by date

Go to the **Alarms** tab and find alarms using the following methods:

- Click the Calendar icon and select a default time:
    - Today

- Last 7 Days
- Last 30 Days
- Last 1 Year
- All

- Alternatively, you can click any two dates on the calendar to find alarms within that time period.
  A red dot icon appears above the filter icon to indicate that a custom alarm filter is active.

Finding alarms by severity, device, tag or keywords

Go to the **Alarms** tab and find alarms using the following methods:

- Click the filter icon
- Click the **Severity** option to select **All Severity**, **Critical**, **High**, **Medium** or **Low** from the drop-down menu.
- Click the **All Devices**, **All Tag**, or **All Keywords** options to enter the device name, tag, or keyword in the search box and click **Apply**.

Configuring schedules using the Schedule Builder

See the following tasks:

- Configuring a calendar
- Configuring a schedule

Configuring a calendar

To create and configure a calendar, see the following tasks:

- Creating a new calendar
- Editing a calendar
- Viewing and managing calendar events
- Deleting the calendar

Creating a new calendar

1. Click **New** > **New Calendar**.
2. In the New Calendar dialog box, enter a name.
3. Click **Save**.
4. Click **Save & Events** to view the calendar event dialog box and add, edit, or delete events.

Editing a calendar

Click the **Edit** icon in the **Operate** column to edit the calendar, including changing the name and managing calendar events.

Viewing and managing calendar events

1. Click the **Calendar** icon in the **Operate** column to view and manage calendar events.
2. Go to Adding a special event, Editing a calendar event, and Deleting the calendar event.

Adding a special event

1. Click **Add Event**.
2. Click the left and right arrows to adjust the calendar and click the date to add a special event.
3. Enter a name for the event.

4. Select the event type and customize the event time.
   - **Date:** Select any day, month, and year, where the month and day must be a logical match.
   - **Date Range:** Select a specific range of time for events, where the month and day must be a logical match.
   - **Week and Day:** Define events by the week of the month and the day of the week.
5. Click **Save**.

Editing a calendar event

1. Click the **Edit** icon to the right of the calendar event entry.
2. Adjust the event details and click **OK**.

Deleting the calendar event

1. Click the **Delete** icon to the right of the calendar event entry.
2. Click **OK** to confirm and delete the calendar event.

Deleting the calendar

1. Click the **Delete** icon in the **Operate** column.
2. Click **OK** to confirm and delete the calendar.

Configuring a schedule

To create and configure a schedule, see the following tasks:

- Creating a schedule
- Editing a schedule event
- Viewing and managing schedule events
- Deleting the schedule
- Managing links
- Configuring the schedule synchronization settings

Creating a schedule

1. Click **Add** > **New Schedule**.
2. In the New Schedule dialog box, enter a name.
3. Select the output type of **bool**, **integer**, **float**, or **enum**.
4. Set the default value and unit of measurement (for example, integer or float value).

   Note: For an enum, configure the enum type and enum value by navigating to **Settings > Data Settings > Configure**, and set the corresponding default **Enum** value.

5. Click **Save**.
6. Click **Save & Events** to view the schedule event dialog box and add, edit, or delete events.

Editing a schedule event

1. Click the **Edit** icon in the **Operate** column.
2. Adjust the event details and click **OK**.

Viewing and managing schedule events

1. Click the **Schedule task event** icon in the **Actions** column to view the task event and manage the task event.
2. Go to Editing weekly events, Editing special events, and Referencing calendar events.

Editing weekly events

1. Click the **Weekly Events** tab.
2. Click a start and end time in the calendar. The selected time displays in the **Event Start** and **Event Finish** fields. To define a more specific time, click the **Edit Time** icon.
3. Configure the output value for the selected time.
4. You can right-click on your selected time in the calendar to further configure your weekly events.
5. Click **Save and Close**.

Editing special events

1. Click the **Special Events** tab.
2. Select a special event.
3. Click **Add Event**.
4. Enter a name for the event.
5. Select the event type and customize the event time.
   - **Date:** Select any day, month, and year, where the month and day must be a logical match.
   - **Date Range:** Select a specific range of time for events, where the month and day must be a logical match.
   - **Week and Day:** Define events by the week of the month and the day of the week.
6. Click **Save and Close**.
7. Select the special event entry from the list and click the **Edit** or **Delete** icon to edit or delete the event.

   To edit a time, right-click a time to view the action menu. You can copy and paste days, apply an event to weekdays, set an all day event, delete an event, clear the day, and clear the week.

   To define a more specific time, click the **Edit Time** icon next to **Event Start** or **Event Finish**.

Referencing calendar events

1. Select a special event.
2. Click **Add Event**.
3. Enter a name for the event.
4. Select **Reference** for the event type.
5. Select the target calendar event from the list of calendar events.
6. Click **Save**.
7. Select the reference event entry from the list and click the **Edit** or **Delete** icon to edit or delete the event.

   To edit a time, right-click a time to view the action menu. You can copy and paste days, apply an event to weekdays, set an all day event, delete an event, clear the day, and clear the week.

   To define a more specific time, click the **Edit Time** icon next to **Event Start** or **Event Finish**.

Deleting the schedule

1. Click the **Delete** icon in the **Operate** column.
2. Click **OK** to confirm and delete the schedule.

Managing links

To link a schedule task event to a device, see Linking devices.

To remove the link between a schedule task event and a device, see Disconnecting the device.

Linking devices

1. Click the **Link** button.
2. The system establishes the connection and opens the Device binding dialog box.

3. Select the task that you want to link to the device.
4. Click **Add to Device** and select the device. View the pending synchronization task in the list.
5. Click **Close**. The system synchronizes the linked task to the selected device.
6. Bind the task to the device again.
7. The system establishes the connection and opens the Device binding dialog box again.
8. Select the task to link to the device.
9. Select the path of the device that you want to link.
10. Click **Action** > **Link** to connect the task and device path.
11. Click **Close**. The system synchronizes the linked task to the selected device.

Disconnecting the device

1. Select the path of the device that you want to disconnect.
2. Click **Operate** > **Unlink** or click the **Link** icon in the **Operate** column.
3. Click **Close**.

Configuring the schedule synchronization settings

1. Select one or more device to synchronize. Only devices with linked schedules are displayed.
2. Click the **Edit** button.
   To synchronize a single device, click the **Edit** icon in the **Operate** column.
3. Select the synchronization type and customize the time as follows:
   - **Disabled**: Do not synchronize.
   - **Interval**: Automatically synchronize at specified intervals.
   - **Schedule**: Automatically synchronize at a specified time, including a possible time offset depending on the system operation.
4. Click **Save**.
   If you selected **Interval** or **Schedule**, the system immediately synchronizes. If you selected multiple devices to synchronize at the same time, the system configures the devices to synchronize automatically.

Syncing manually

To manually synchronize devices configured for interval or scheduled execution:

1. Select one or more devices with a Schedule Type of **Interval** or **Schedule**.
2. Click the **Sync** button.
   To synchronize a single device, click the **Sync** icon in the **Operate** column.

Configuring schedules using Schedule Config

Setting the schedule with Schedule Config

After you link the **Schedule** and **Device Schedule** in the schedule builder, you can use the **Schedule Config** tab to configure a schedule.

1. Click **Schedule Config**
2. Select your device and click the pen icon in the **Operator** column
3. Select the **Crontab** type, **Disabled**, **Interval** or **Schedule**, from the drop-down menu. The **Crontab** feature allows you to configure the sync operation from ES to the connected controllers
4. You can also click the **Sync** tab to immediately sync ES to the connected controllers

Managing historical information

To manage historical information, see the following tasks:

- Configuring historical synchronization settings
- Creating a historical data query

Configuring historical synchronization settings

Before you begin:
When the Device Management configuration completes, the historical synchronization settings display the name of the corresponding deployment device.

1. Select the schedule type and edit the configuration:
   - **Disabled**: Do not synchronize data.
   - **Interval**: Synchronize data at a specified interval.
   - **Schedule**: Synchronize data at a specified execution time, including a possible time offset depending on the system operation.
2. Click **Save**.
3. Click the **Sync** or **Refresh** button to synchronize or refresh each operation. When complete, the updated time displays in the **Completed at** column.

Creating a historical data query

Before you begin:
Before you create a historical data query, create the data in the controller and synchronize to the ES. Refer to the following document for your specific controller *EasyIO Neo Series CW Controller User Guide LIT-12014483* or *EasyIO Neo Series EC Controllers Sedona Kits Technical Bulletin LIT-12014475*.

1. Add a SQL table and column in the controller with data from the database of the controller.
2. Use the ES to set up a history sync for the controller database. See Configuring historical synchronization settings.

To create a historical data query:

1. Navigate to the Tag management tab and click **All**
2. Select **History** from the drop-down menu to create a history tag
3. Navigate to the **History** tab in the Feature column and click **History Query > +Add**
4. Enter a Title
5. Select the query dates for the **X Axis**
6. Click **+ Add Field** to add the history tags for the **Y Axis**
7. Click **Run** to generate the graph or Save to save the query. You can view the results in different formats by selecting a table, line chart, bar chart or heat map

Configuring tags

To configure data sources, see the following tasks:

- Creating a new tag
- Editing a tag
- Copying a data source
- Deleting a tag

Creating a new tag

1. Click the **Tag** window on the Home page.
2. Click **+ Add**.
3. In the **Device** field, select your device from the drop-down list.
4. In the **Tag Name** field, enter a name for the tag.
5. Select **Tag Type** and **Permissions** and click **Save** or **Save and Continue** to add more tags.

   ⓘ **Note:** You can view and manage tag hierarchy in the **Data Tree** window when you configure a tag

Editing a tag

1. Click the **Edit** button in the **Operate** column.
2. Modify the tag source. See Creating a new tag for more information.
3. Click **Save**.

Copying a data source

- Click the **Copy** button to create a tag using an already established tag.

Deleting a tag

1. Click the **Delete** button.
2. Click **OK**.

Configuring pages using the Page Builder

1. Click **admin** → **Page Builder**
2. Click **+ Add**.
3. Enter the name for the page in the **Page Title** field, with a character limit of 20.
4. Choose a **Page Icon**.
5. Choose page permissions for each role that you require. You can choose from **View** or **Edit** permissions.
6. Click **Save** or **Save and Edit**, to edit the page.

Widgets in the Page Builder

Editing widgets in the page builder

You can edit widgets for each page in the Page Builder. Select the widgets that you require for your space from the **Widgets** tab on the left hand column of the page builder. You can select multiple widgets from **Components**, **Charts** and **Graphics** drop-down menus to drag into the **Frame** of the edit window. You can link widgets to controllers, group widgets together and create hierarchies of pages set into a tree structure to give a whole-network system within your building by following the steps below:

1. Drag and drop widgets into the canvas frame.
2. Use the **Settings** column on the right to configure the properties specific for each widget.
3. Select a widget and click **Bind** in the Settings column to bind it to a controller tag.
4. Click the **Groups** tab and select the required widgets.
5. Click **Group**.
6. Click **Set Page** on the Page Builder home page.
7. You must ensure that you correctly configure and link the widgets on each page to the data points.

Note: If you enable **Value Editable**, the system enables write access to the bound slot, even if the slot status is read-only. This can introduce unintentional effects. To maintain controller behavior, do not use this configuration.

Configuring system settings

To configure system settings, see the following tasks:

- Updating the site name
- Updating the logo image
- Adjusting the disk cleaner threshold
- Updating the log on page background image
- Managing account settings

Updating the site name

1. Go to the Settings screen.
2. Click **Site Name** or click the **Edit** button next to the site name.
3. Modify the site name with a maximum character length of 20.

   Note: Click the **Restore** icon to reset the site name or click **Cancel**.

4. Click **Save**.

Updating the logo image

1. Go to the Settings screen.
2. Click **Logo Image** or click the **Edit** button next to the logo image.
3. Click **Upload Image** and select the logo image to use.

   Note: Click the **Restore** icon to reset the image or click **Cancel**.

4. Click **Save** to change and view the updated logo on the home page.

Adjusting the disk cleaner threshold

1. Go to the Settings screen.
2. Click **Cleaner Threshold** or click the **Edit** button next to the cleaner threshold value.
3. Modify the size value.
4. Select the unit type of either GB or MB.
5. Click **Save**. When the free space on the server is less than the threshold, the log on page shows a cleanup reminder message.

Updating the log on page background image

1. Go to the Settings screen.
2. Click **Login Background Image** or click the **Edit** button next to the log on background image.
3. Click **Upload Image** and select the log on page background image to use in PNG, JPG, or JPEG format.

   Note: Click the **Restore** icon to reset the image or click **Cancel**.

Managing account settings

To manage account settings, see the following tasks:

- Changing the password period
- Changing the password notification period
- Changing the automatic log off time

Changing data settings

You can change the descriptions and values for **Boolean** and **Enum** data types.

1. Go to **Admin > Settings > Data Settings > Configure**
2. In the **Boolean** tab, enter new captions for **True**, **False**, and **Null**
3. In the **Enum** tab, click **+ Add** or **Import**
4. If you choose to add manually, enter the new details for **Name**, **Description** and **Values** for Enum data
5. Click **Save**

Managing alarm settings

To change the system alarm settings, complete the following steps:

1. Go to **admin** > **Settings** > **Alarm Settings**
2. Click **Edit**
3. To enable or disable **Alarm Audio**, click the toggle icon
4. Click the drop-down menu to select a **Global Alarm Notification** time. The default is 1 hour
5. Click the drop-down menu to select the **Global Alarm Severity Settings**
6. Enter the **Max Records Per Device**, the range is 1 to 100,000
7. Click **Save**

Changing the password period

1. Go to the Settings screen.
2. Click **Password Period** or click the **Edit** button next to the password period value.
3. Change the validity period value.
4. Select the unit of either day or month.

   Note: Click the **Restore** icon to reset the valid password period or click **Cancel**.

5. Click **Save**. The log on password expires after the specified time.

Changing the password notification period

To change the notification period for showing password update reminder messages:

1. Go to the Settings screen.
2. Click **Password Notification** or click the **Edit** button next to the password notification time.
3. Change the reminder time.
4. Select the unit of either day or week.

   Note: Click the **Restore** icon to reset the time or click **Cancel**.

5. Click **Save**. When the log on password expires in the specified time, a password update reminder message shows on the home page.

Changing the automatic log off time

1. Go to the Settings screen.
2. Click **Auto Logout** or click the **Edit** button next to the auto log off time period.
3. Change the automatic log off inactivity time value.
4. Select the unit of minute, hour, or never.

   ⓘ **Note:** Click the **Restore** icon to reset the time period or click **Cancel**.

5. Click **Save**. The software automatically logs off when you do not operate the software for the specified time.

Managing permissions

Permission management consists of two parts: accounts and roles.

Accounts

The default account has the administrator role and is named `admin`. The default log on password is `helloQwert4u#`

Roles

The default roles are Viewer, Operator, Manager, Engineer, and Administrator.

Permissions

The ES has five permissions that are listed from lowest to highest privilege:

- **Disabled:** Users assigned to the role cannot view the feature.
- **View:** Users assigned to the role can view the feature.
- **OtherOperation:**Users assigned to the role can view and execute the feature but they cannot modify the feature. For example, a user can view and execute a workflow but they cannot modify the workflow.
- **Create/Edit:** Users assigned to the role can read, execute, and edit features.
- **Delete:** Users assigned to the role can read, execute, write, and delete features.

Creating or editing a role

Edit or create new customized roles if the original roles do not meet your requirements.

1. Click **Admin > Permission** to expand the menu and click the **Role** tab
2. Click **Edit** to edit or delete an existing role
3. Click **Add Role** to create a new role category. You can create up to 15 roles
4. Click **Save**

Creating or editing an account

1. Click **admin > Permission** to expand the menu and click **Account**. Initially, there is one account named **admin**.
2. Click **New** to create a new account or click the pen icon in the **Operate** column to edit an existing account. You cannot edit the original **admin** account.
3. Enter the log on name for the account with a maximum of 16 characters.
4. Enter the user name for the account with a maximum of 16 characters. The user name is the display name.

5. Enter the password. The password length must be between 12 and 32 characters and contain both uppercase and lowercase characters, numbers, and special symbols.
6. Select the date for the password to expire with a maximum of 90 days.
7. **Optional:** Enter the email address of the user.
8. **Optional:** Enter the telephone number of the user.
9. **Optional:** Select a Home Page.
10. **Optional:** Select a date to disable the account. Leave this blank if it does not apply.
11. Click the **Enabled** toggle button to activate or deactivate the account. When you toggle the button to the left, the account is not active. When you toggle the button to the right, the account becomes active and you can select a date for the account to expire. Leave the field blank to permanently activate the account.
12. Select the role for the account.
13. Click **Save**.
14. Click the number in the **Linked Devices** column to link the ES and controller accounts.
15. Click **Save**.
16. Click the trash can icon in the **Operate** column to delete an account.
17. Click the admin account name in the menu bar and click **Logout**.

Logging on with the new account

After you log off from the admin account, log on with the new account. See Logging on to the System Supervisor (ES). The display name in the menu bar for the account shows the new user name, and the home page shows the main features of the system.

1. Click the account name in the menu bar and click **Profile** to view account information.
2. Click **Edit** to change the user name, email, phone number, or password expiration date.
3. Click **Save**.

Changing the password

1. In the Profile Management Information screen, click **Change Password**.
2. Enter the current password.
3. Enter the new password twice.

   Note: The password length must be between 12 and 32 characters and contain both uppercase and lowercase characters, numbers, and special symbols.

4. Click **Save**.

Using the utilities

To use the utilities, see the following tasks:

- Creating a backup file
- Restoring a backup file
- Exporting a database
- Importing a database
- Updating the HTTPS certificate and key
- Managing disk space using the Cleaner
- Restarting the ES service

Creating a backup file

1. Click **Utilities**.
2. **Optional:** Edit the name of the backup file with a maximum of 32 characters.

   The **Backup** tab automatically shows the backup file name based on the current time and date with the format of `ES_yyyymmdd_hhmm`. For example, if you viewed the Utilities screen on September 16, 2024 at 13:35, the backup file name shows `ES_2024916_1335`.
3. Click **Backup** to create the backup file. After the file generates, a success message shows in the menu bar and the Backup to download field lists the name of the backup file.

   Note: You can use the **Auto Backup** option to create backups at **Interval** or **Schedule** time points.
4. Click **Download**.
5. Enter an encryption password for the backup file twice.

   Note: The password length must be between 8 and 32 characters. To restore the backup file later, you must remember this password to later upload and restore the backup file to the system.
6. Click **OK** to download the zip file.

Restoring a backup file

1. Go to the Utilities screen and click the **Restore** tab.
2. Click **Refresh** to view the previously backed up files.
3. **Optional:** Click **Upload Backup** to upload a backup file.
   a. Drag and drop the target backup file to the select file box of the Upload Backup dialog box.
   b. Click the **Upload** icon.
   c. Enter the password that you set when you created the backup file.
   d. Click **OK**.
   e. Click the **Close** icon.
   f. Click **Refresh** to show the file you uploaded in the Local Backup List.
4. In the Local Backup List, click the **Restore** icon in the **Actions** column of the backup that you want to restore. The Restore dialog box prompts you to create a backup of the existing setup.
5. Click **Yes** to create a backup of the existing configuration or click **No** to skip the backup task.
6. Click **Yes** on a second Restore dialog box to confirm and restore the backup file.

   If the restore process fails, the previous program automatically restores if a backup file of the program exists.

   The ES restarts for the change to take effect and opens to the log on page.

Exporting a database

1. Go to the Utilities screen and click the **Import/Export DB** tab.
2. **Optional:** Edit the file name of the database you want to export with a maximum of 32 characters.
3. The **Import/Export DB** tab shows the file name based on the current time and date with the format of `ES_DB_yyyymmdd_hhmm`. For example, if you viewed the screen on May 7, 2024 at 22:21, the file name shows `ES_DB_2024507_2221`.
4. Click **Export Database Files**.
5. Enter an encryption password for the database file twice.

   Note: The password length must be between 8 and 32 characters. To import the database later, you must remember this password.

6. Click **OK** to download the zip file.

Importing a database

1. Go to the Utilities screen and click the **Import/Export DB** tab.
2. Click to select the database zip file to import.
3. Browse to and select the database file.
4. Click **Open**.
5. Click **Import Database Files**.
6. Enter the password that you set when you exported the backup file.
7. Click **OK**.

   The ES service checks the validity of the database file, restarts for the change to take effect, and opens to the log on page.

Updating the HTTPS certificate and key

Before you begin:
The following information explains how to generate certificates and keys:

Private key

Run the following command to generate a 2048-bit RSA private key and save the key in a file named `private.key`:

```
$ openssl genrsa -out private.key 2048
```

Certificate signing request (CSR)

Run the following command to generate a certificate signing request file with a `.csr` file extension. Then provide details about the certificate, such as the organization name, country code, and common name (usually your domain name).

```
$ openssl req -new -key private.key -out certificate.csr
```

Self-signed certificate

Run the following command to generate a self-signed certificate with a `.crt` file extension valid for 365 days.

```
$ openssl x509 -req -days 365 -in certificate.csr -signkey private.key -out certificate.crt
```

1. Go to the Utilities screen and click the **HTTPS Certificate** tab.
2. Click the **Select Certificate File** edit box to select the certificate to update.
3. Click the **Select Key File** edit box to select the key to update.
4. Click **Upload**.
5. Click **Apply** to update the selected certificate and key files.
6. Refresh the web page or restart the ES service for the new certificate and key to take effect.

Managing disk space using the Cleaner

1. Go to the Utilities screen and click the **Cleaner** tab to see the current disk usage.
2. Change the configurable cleaner settings. Click the **Edit** icon to set the retention period and click **Save**. These settings do not impact device data.
   - **History data:** Deletes device records from before the specified period, for example, two years ago.
   - **Database:** Rebuilds and compresses database files to minimize the database footprint.
   - **Backup files:** Deletes backup files from before the specified period, for example, 15 days ago.
   - **Workflow files:** Deletes workflow files from before the specified period, for example, 15 days ago.
3. Click **Clean** to begin the disk cleanup process. A green status icon shows after each cleanup task completes.

Restarting the ES service

1. Go to the Utilities screen and click the **System Control** tab.
2. Select **Restart** from the Select Operation menu.
3. Click **Execute**.
4. Click **OK** to confirm the restart action. The progress screen shows a waiting message for approximately 10 seconds and then the system restarts and opens to the log on page.
5. Log on to the ES. See Logging on to the System Supervisor (ES).

Viewing audit history

1. Go to the Audit History screen.
2. Filter or search the results.
    - **Date Range:** Select a predefined time range from the list or click **Customize** to select a custom time range and click **OK**.
    - **User Name:** Select a user name from the list to filter the results. Click the **X** next to the name to clear the filter.
    - **Search:** Enter a keyword to search the results. The results list filters as you type. Click the **X** next to the keyword to clear the filter.
3. Configure the results list.
    - Click the **Settings** icon to change the maximum number of records to display in the list and click **Save**. The value must be between 100 and 1,000,000.

      Note: The account with Admin permission can choose which history appears in audit.
    - Click the **Export Records** icon to export the records to a CSV or PDF file.
    - Click the Filter icon in the **Operate** column to select the columns of data to view in the display bar.
    - Click the number of records in the **Items per page** menu to change the number of items shown in the results list.

Viewing system status

- Go to the **System Status** screen to view the CPU and memory usage charts, and other system status details.

Product warranty

This product is covered by a limited warranty, details of which can be found at www.johnsoncontrols.com/buildingswarranty.

Software terms

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Single point of contact

APAC	EU	UK	NA/SA
JOHNSON CONTROLS C/O CONTROLS PRODUCT MANAGEMENT NO. 32 CHANGJIANG RD NEW DISTRICT WUXI JIANGSU PROVINCE 214028 CHINA	JOHNSON CONTROLS VOLTAWEG 20 6101 XK ECHT THE NETHERLANDS	JOHNSON CONTROLS TYCO PARK GRIMSHAW LANE MANCHESTER M40 2WL UNITED KINGDOM	JOHNSON CONTROLS 5757 N GREEN BAY AVE. GLENDALE, WI 53209 USA

Contact information

Contact your local Johnson Controls representative: www.johnsoncontrols.com/locations

Contact Johnson Controls: www.johnsoncontrols.com/contact-us