


# BMS Startup App

## DEVICE PAIRING & POINT CHECKOUT

<b>About this Guide .....</b>	<b>2</b>	<b>Point Check-Out Workflow .....</b>	<b>16</b>
<b>System Overview .....</b>	<b>2</b>	Point Check-out .....	17
Introduction .....	3	Add Site .....	17
Features and Benefits .....	3	Select Site .....	17
Compatibility .....	3	Site List Screen .....	18
Mobile App Minimum Requirements .....	3	Site Overview .....	18
Mobile App Installation .....	3	Connect to Device .....	19
Prerequisites.....	3	Terminal IO Overview .....	23
Device Pairing .....	3	Terminal IO .....	23
Point Checkout .....	3	Analog Output .....	23
Supported Devices List .....	4	Analog Input .....	27
<b>Get Started.....</b>	<b>4</b>	Binary Output .....	27
<b>Device Pairing Workflow .....</b>	<b>5</b>	Binary Input .....	31
Device Pairing .....	5	Terminal IO Test Results .....	33
Add Site .....	6	Add a reason .....	35
Site List Screen .....	7	View Test History .....	35
Add Device .....	7	Generate Report .....	36
Generate Report .....	11	<b>Settings.....</b>	<b>37</b>
Device management .....	14	About .....	38
Edit Device .....	14	Logs .....	39
Delete Device .....	15	<b>Site Management .....</b>	<b>39</b>
		Select Site .....	39
		Edit site .....	40
		Delete site .....	41

# ABOUT THIS GUIDE

This guide describes the process of using the BMS Startup App.

 **IMPORTANT:**  
The images in this document are for reference and do not denote the real-time values.

## SYSTEM OVERVIEW

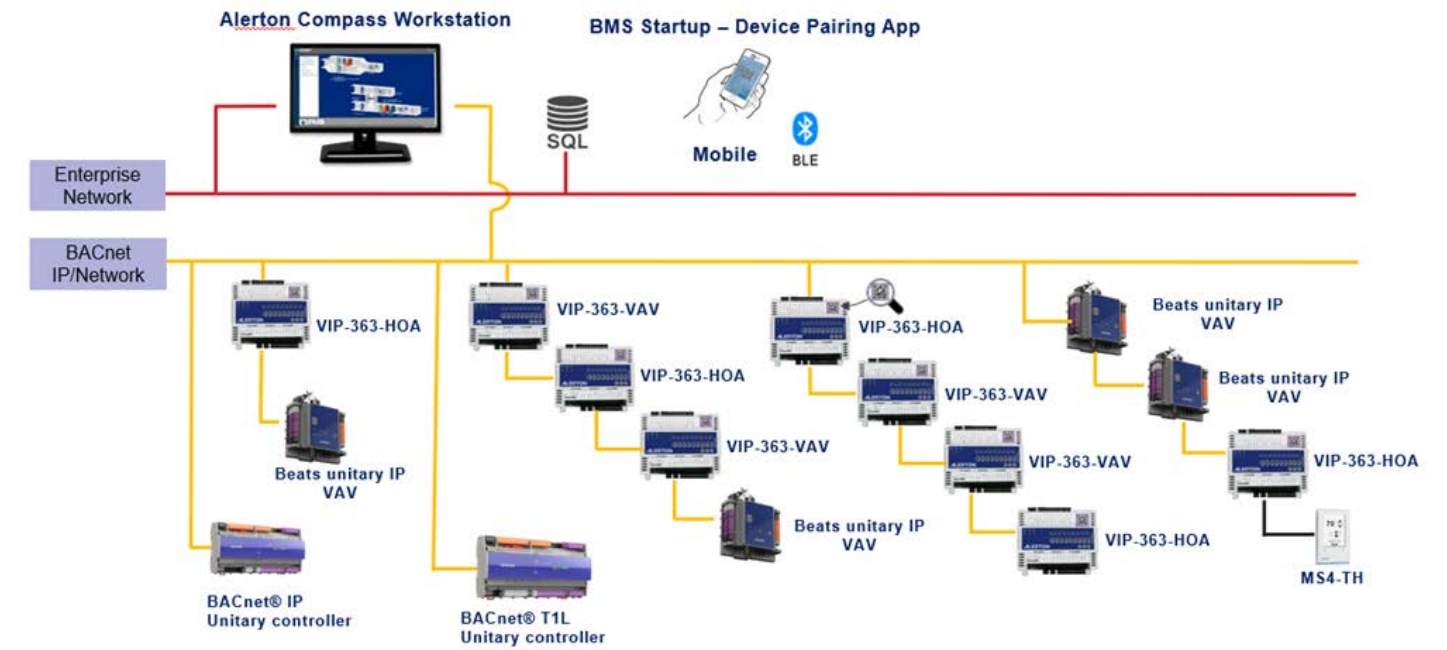



Fig. 1 System Overview

 **NOTE:**  
The System Overview is only a representation and not comprehensive.

## Introduction

BMS start up app enables technician to perform startup/installation and to perform device pairing followed by point to point checkout.

### Device Pairing

It is an inventory-building app feature, can be used by technician for device pairing with the logical device instance ID for the device configuration.

### Point Checkout

The BMS Start-up App – Point Check Out – enables performing terminal and point check out on our Alerton BMS Controllers that are configured using Engineering tool.

## Features and Benefits

1. Site management
2. Device Pairing:
  - Device Pairing enables bulk configuration of Alerton XYZ controllers, reducing manual work and time on site.
  - The mobile app captures device data from the device QR code, allowing a user to export this information directly into Compass via CSV.
3. Point to point checkout:
  - Reduce Commissioning time by testing connected sensors and actuators directly via your App.
  - Connect to the Controllers via BLE and retrieve IO/Point Config to enable Point Check Out, including:
    - View Live Point Values
    - Override Outputs
    - Record Test Results
    - Visualize Project Progress
    - Generate Automatic Reports
    - Device Management

## Compatibility

App is compatible with iOS 15 or Android 8 and above.

**BMS Startup App Logo**



**Fig. 2 App Logo**

## Mobile App Minimum Requirements

Check the below requirements before installing the App in your device.

- Minimum Android 8 and iOS 15

- Internal RAM +512 MB
- Internal Memory +16 GB
- At least 300 MB free space to download and use the app
- Screen Resolution High 1080 x 720 pixels
- Any processor

## Mobile App Installation

**Android Device:** Download and install the App from the Google Play store or by scanning the QR code below.



**iOS Device:** Download and install the App from the App store or by scanning the QR code below.



### IMPORTANT:

You can install the app in tablet, but you may experience UI alignment issues.

## Prerequisites

### Device Pairing

1. Ensure Compass (2.2.0 or above version) tool is installed in the system.
2. Make sure the controller is updated with the latest firmware.

### Point Checkout

1. Ensure Compass (2.2.0 or above version) tool is installed in the system.
2. Make sure the controller is fitted with Bluetooth.
3. Make sure the controller is updated with the latest firmware.
4. Ensure controller is fully configured & application is downloaded to controller.
5. Set the time in controller using "Time Sync" option.
6. Set the BLE configuration of device - Enable BLE, PIN with expiry.

# Supported Devices List

Table 1. App Supported Devices

Device Pairing	Point Checkout
VIP-363-HOA	VLC8u8-IP-BLE
VIP-363-VAV	VLC8u8-BLE
VAVi-7u5-IP	VLC8u8-T1L-IP
VAVi-0-IP	VLC8u8-T1L-BLE
VLC8u8-IP	VLC16u8-BLE
VLC8u8-T1L	VLC16u8-T1L-IP
VLC8u8-BLE	
VLC8u8-IP-BLE	
VLC16u8-IP	
VLC16u8	
VLC16u8-T1L	
VLC8u8-T1L-BLE	

## GET STARTED

1. Open the BMS Startup App .
2. Tap **GET STARTED** on the welcome screen.  
The Terms & Policies pop-up will appear for user consent.

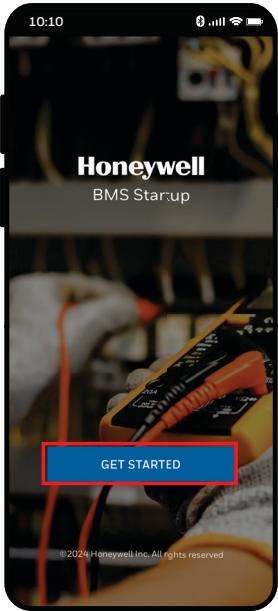


Fig. 3 Get Started Screen

3. Tap and read the **Terms of Use** and **Privacy Policy**.  
Select the **Terms of Use** and **Privacy Policy** and Tap **ACCEPT**, if you agree with those.

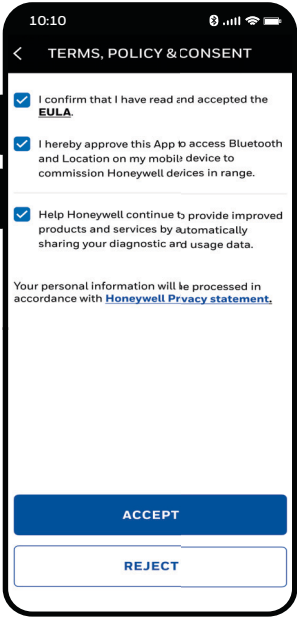



Fig. 4 Terms & Policies

 **NOTE:**  
Applicable only once, after installing the app.

4. The **HOME** screen will appear.

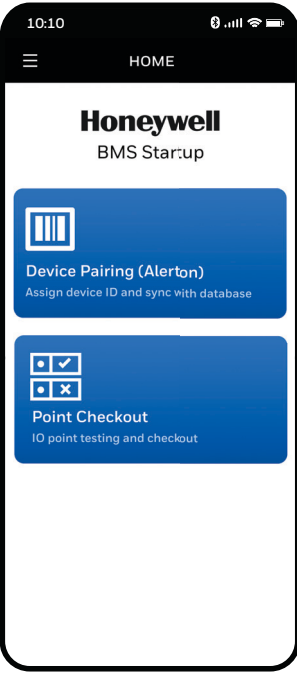


Fig. 5 Home Screen



# DEVICE PAIRING WORKFLOW

The following flowchart explains end to end workflow of device pairing.

## DEVICE PAIRING WORKFLOW

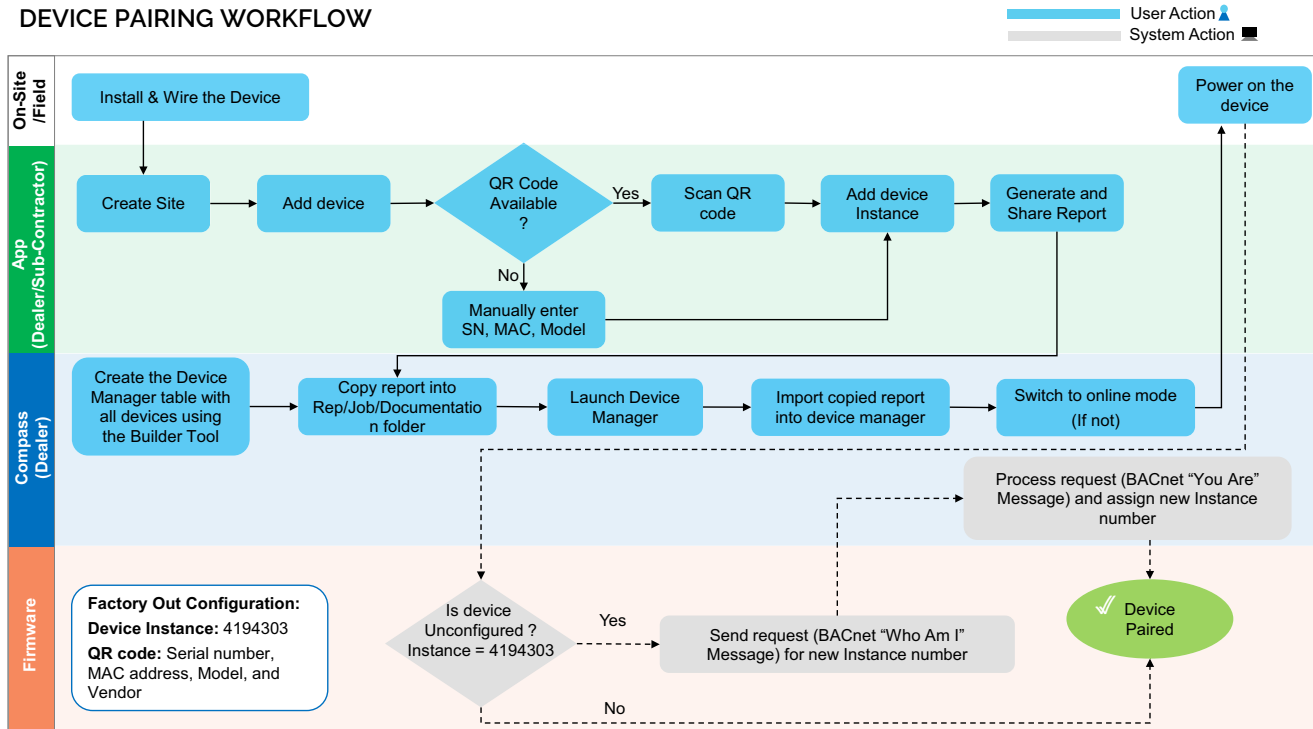


Fig. 6 Device Pairing Workflow

## Device Pairing

1. On the **HOME** screen, tap **Device Pairing**.

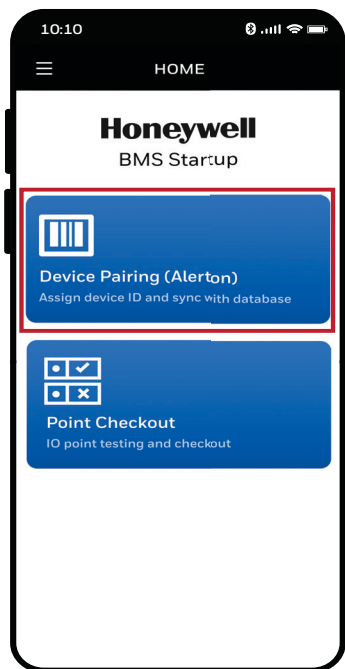


Fig. 7 Home Screen

The site list screen will appear.



Fig. 8 Site List Screen

Continue with the [Add Site](#) on page 6 if no sites are available.

Add Site

1. From the Site list screen, tap **ADD SITE**.



Fig. 9 Site List Screen

2. Enter the below details:
- Site name
  - Address of the site
  - Short description of the site

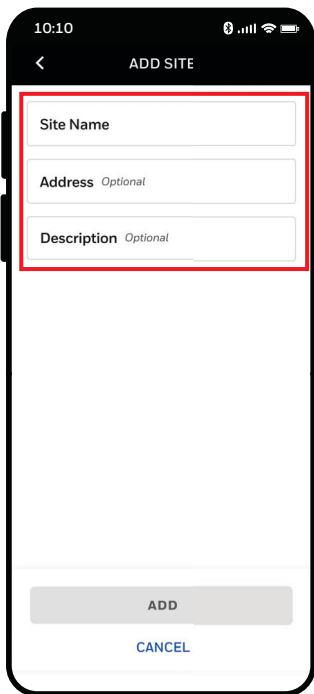


Fig. 10 Add Site Screen

**NOTE:**  
Field marked with \* are mandatory.

3. Tap **ADD**.

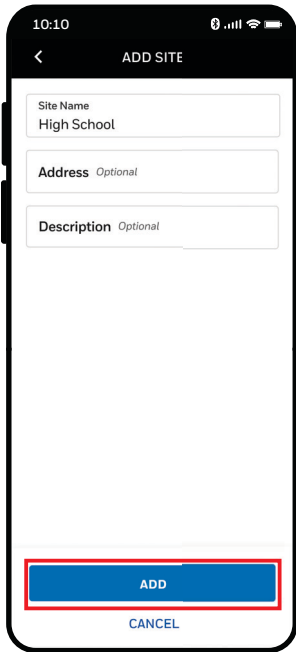


Fig. 11 Add Site Screen

After creating the site, a message appears indicating that the site has been successfully added with the name of the site displayed (e.g. "Honeywell"). The user is then directed to the "Add Device" screen.

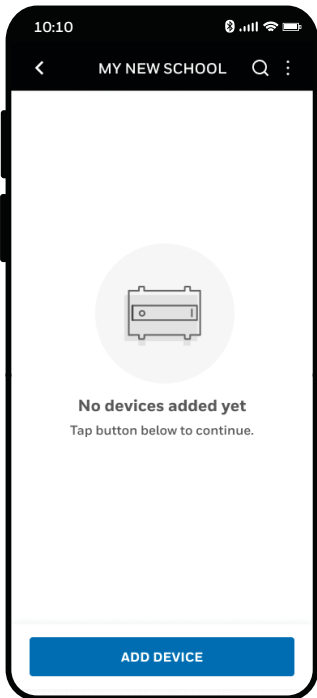


Fig. 12 Site Screen

Continue with [Add Device](#) on page 7.

**NOTE:**

If you wish to add a device to the same site, proceed with [Add Device](#) on this page. Alternatively, return [<](#) to the Site List Screen to choose a different site. See [Add Device](#) on this page for further reference.

## Site List Screen

The Site list screen displays a list of created sites. Follow the [Add Site](#) on page 6 if no sites are available.



**Fig. 13 Site List Screen**

1. Menu.
2. Sites and last updated date and time.

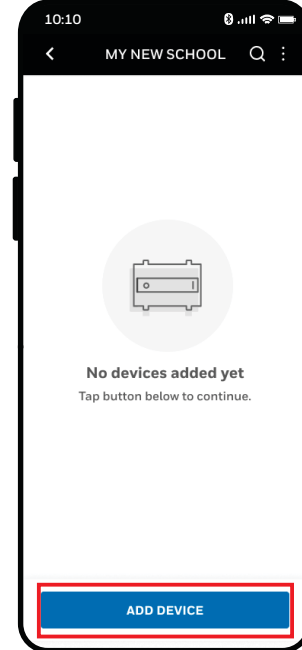
## Add Device

There are two method to add a device to the site:

1. **Scan QR code method (Recommended):** The user aims the camera at the QR code and the code is scanned by the application, which interprets the information contained Model, Serial number, MAC ID within the code and vendor from QR code. It is a simple and user-friendly process that allows individuals to quickly access information using their Mobile device.
2. **Enter Device details manually method:** In the event that the QR code is not accessible or not able to scan the QR code, Enter the device details manually.

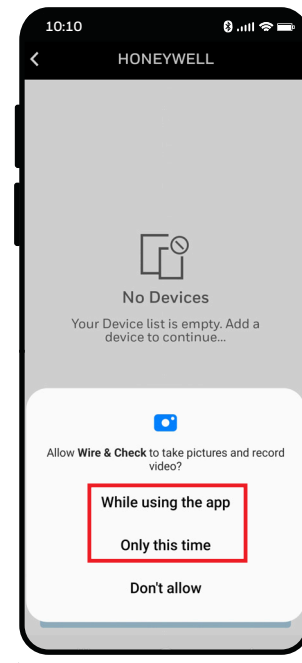
## Scan QR Code Method (Recommended)

1. If you are already in the site, tap **ADD DEVICE**.



**Fig. 14 Site Screen**

2. Allow the app to access your camera by granting camera permissions. See the example figure below for assistance.



**Fig. 15 Access Screen**

3. Scan the QR code from the label adhered to the front side of the controller. Refer to the [Device Pairing](#) on page 5.

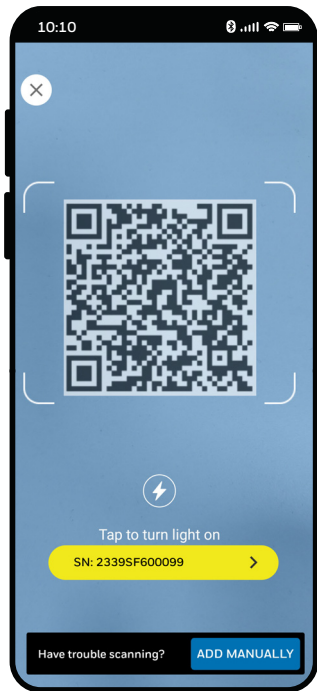


Fig. 16 QR Code Scanner Screen

The device's model number, serial number and MAC address are displayed when the QR code is scanned and successful.

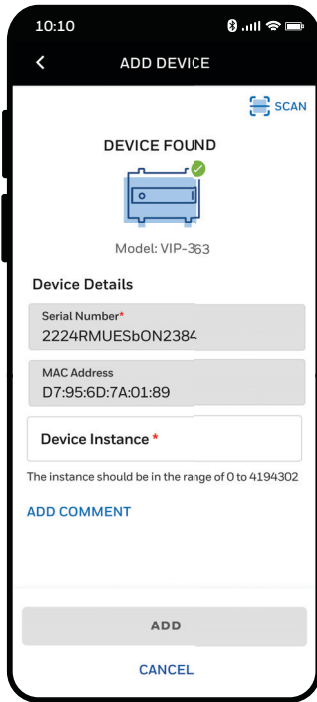


Fig. 17 Add Device screen

4. Enter the Device Instance number.

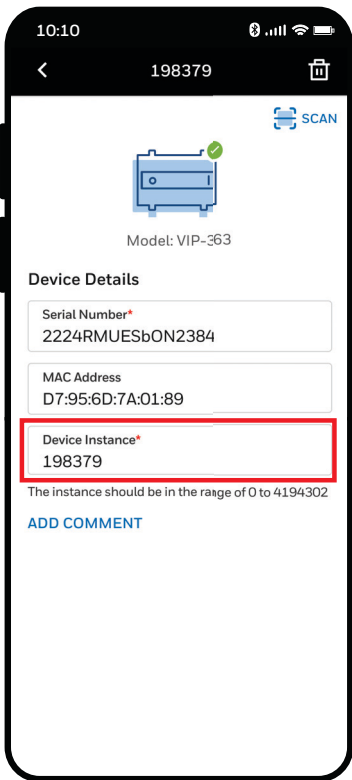


Fig. 18 Add Device Screen

**NOTE:**  
Device Instance number: Unique device number of the device in site

5. Tap **ADD COMMENT** to include a comment and tap **SAVE**. The comment will appear in the generated report.

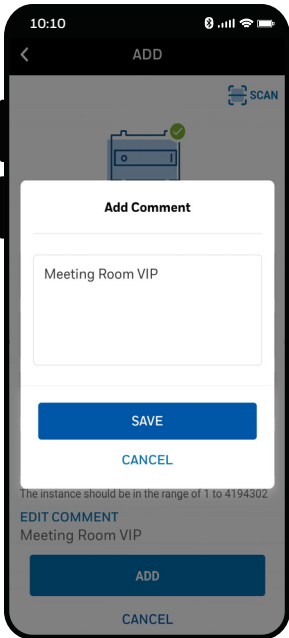


Fig. 19 Add Comment Screen

6. Tap **SAVE**.

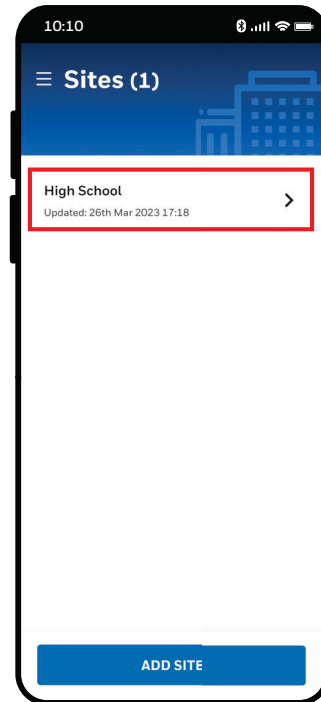


**Fig. 20 Add device Screen**

The device will be added to the selected site.

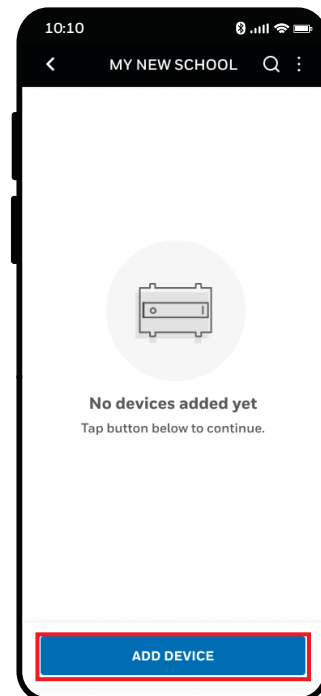
## Enter Device Details Manually

1. From the Site List screen, select a site to which you want to add a device.



**Fig. 21 Site List Screen**

2. Tap **ADD DEVICE**.



**Fig. 22 Add Device**

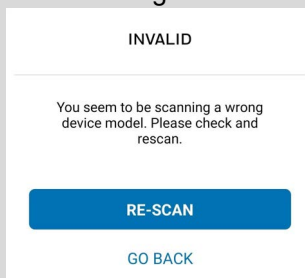


### NOTE:

The mobile device camera must be within 60cm of the QR code to scan correctly.

If you receive an **INVALID** message after scanning the QR code, first check if the hardware model is supported and then [Enter Device Details Manually](#) on page 9.

Example Invalid Message:



3. Allow the app to access your camera by granting camera permissions. See the example figure below for assistance.

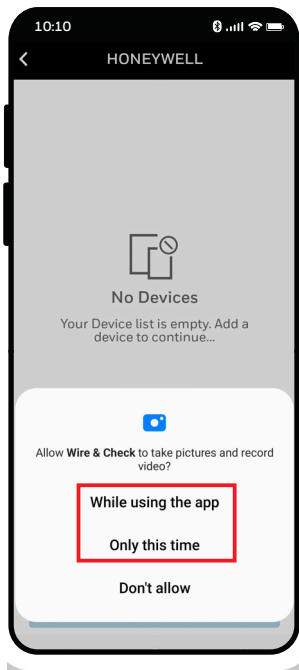


Fig. 23 Access Screen

4. Tap **NO QR CODE**.

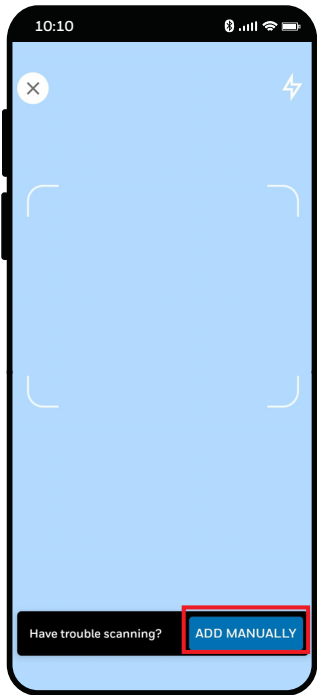


Fig. 24 QR Code Screen

5. Select a **Device Model**.

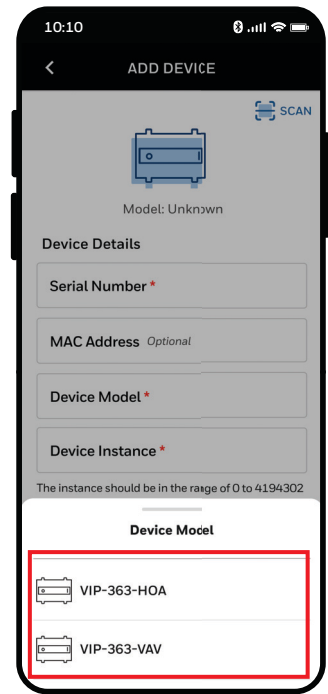


Fig. 25 Model Screen

6. Enter the below details
- Serial number
  - MAC Address
  - Device Instance number.

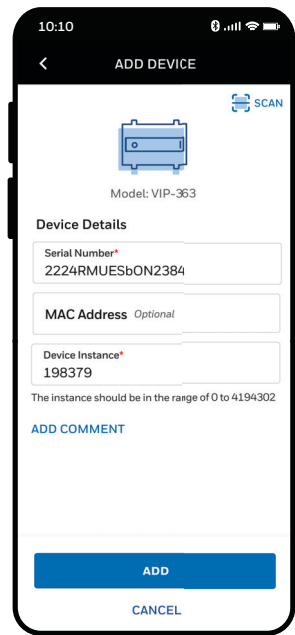


Fig. 26 Add Device Details

7. Tap **ADD COMMENT** to include a comment and tap **SAVE**. The comment will appear in the generated report.

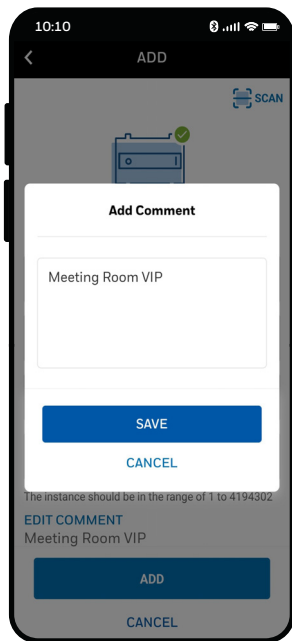


Fig. 27 Add Comment Screen

8. Tap **ADD**.

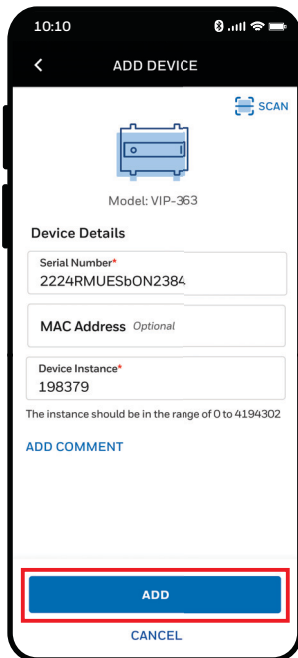


Fig. 28 Add Device Screen

The device will be added to the site.

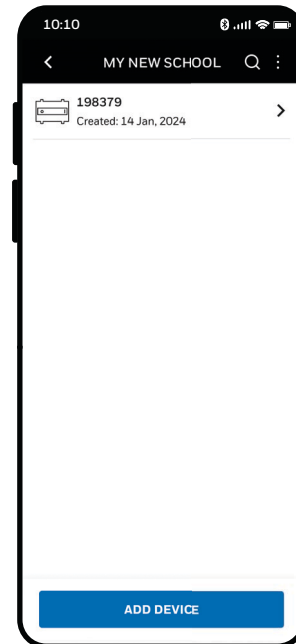


Fig. 29 Device List Screen

## Generate Report

This option will create a report for a selection or all the controllers from the app. The report has data such as Model number, Serial number, MAC Address, Device Instance etc.

### Steps to generate a report:

1. From the **Site List** screen select a site.

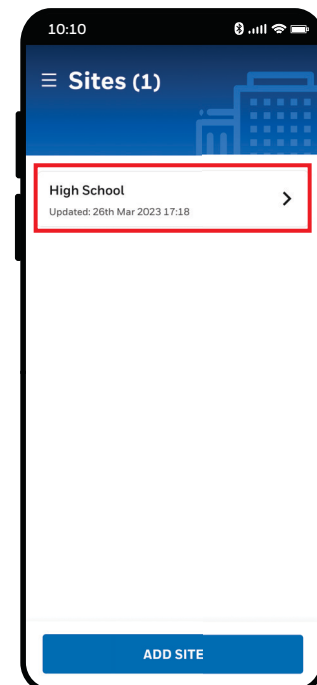

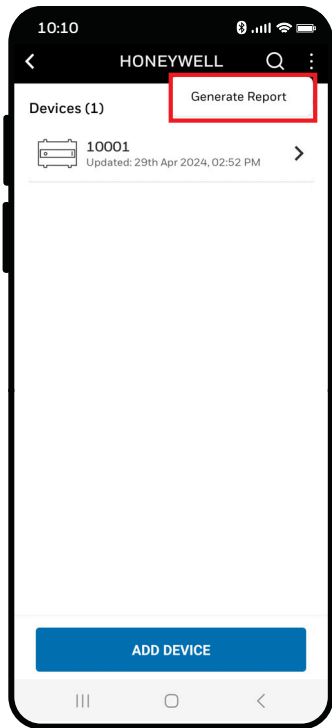


Fig. 30 Site List Screen




A list of all the devices added to the site appears.

2. Tap **More** , then tap **Generate Report**.



**Fig. 31 Device List Screen**


This report is used to import into the Compass device manager and update the Compass database with device physical details such as SN.

- 3. Tap Filter  to filter the devices as per the dates.
- 4. Select one of the below options to filter the device list.
  - a. Dates
  - b. Custom Dates

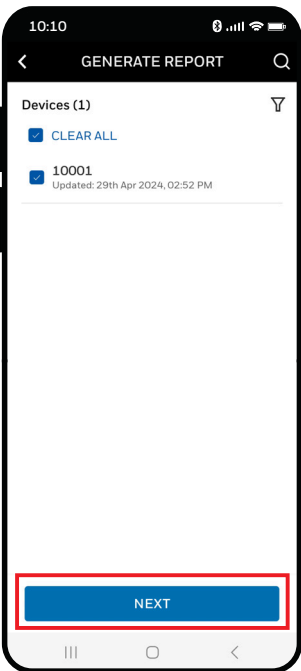
c. Device Instance



**Fig. 32 Filter Screen**

 **NOTE:**  
Tab **CLEAR FILTER** if you want to undo the filters.

- 5. Tap **APPLY**.
- 6. Select one or more devices and tap **NEXT**.

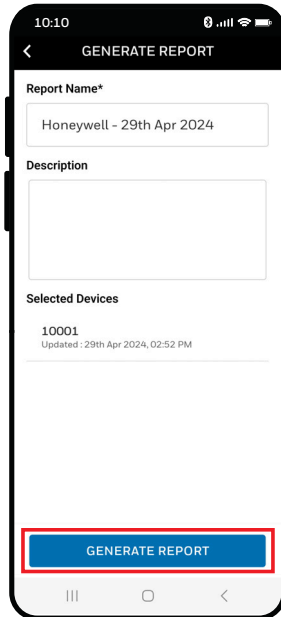


**Fig. 33 Generate Report Screen**

**NOTE:**

To generate a report of all the devices, tap **SELECT ALL**. The Report name is populated as site name by default & can be changed.

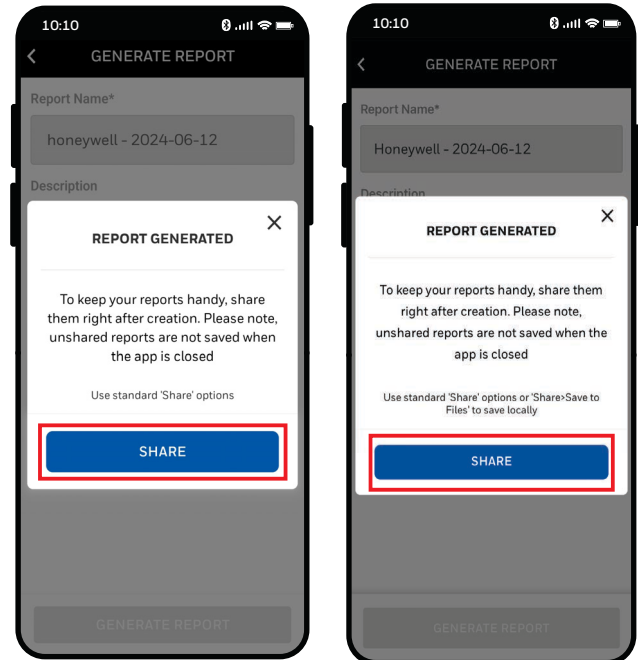
7. Enter **Report Name** and **Description** (optional). Tap **GENERATE REPORT**.



**Fig. 34 Generate Report Screen**

A **Report generated successfully** message will appear and then the screen will navigate to the **GENERATE REPORT** screen.

8. To share the report tap **SHARE**.  
To close the report tap close **X**.

**Android Device****iOS Device**

**Fig. 35 Generate Report Screen**

9. The Share option will prompt the user to Share the report through applications that are installed on their device. We recommend sharing the report through email.

**NOTE:**

**Android:** Use standard Share options.

**iOS:** Use standard Share options or Share > Save to Files to save locally.

If you do not have Internet access, save the report locally and share the file when Internet is available.

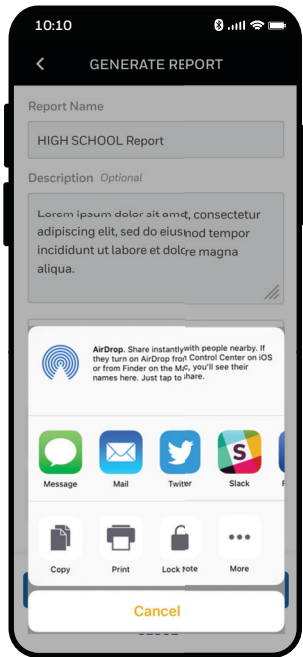


Fig. 36 Share option

Device management

Edit Device

User can edit device details such as model, Serial number, MAC ID, Device Instance number and the comment.

- 1. From the Site list screen, select a site to which the device is added.

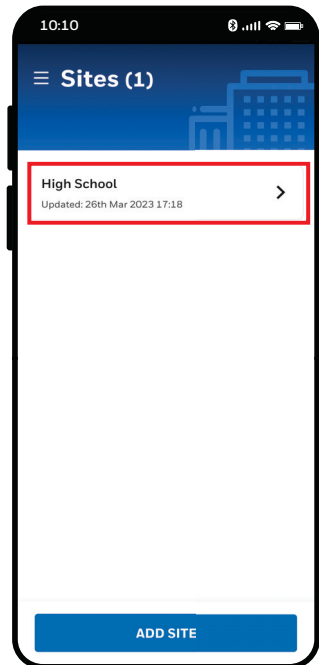


Fig. 37 Site List Screen

- A list of all the devices added to the selected site appears.
- 2. Select a device from the list.

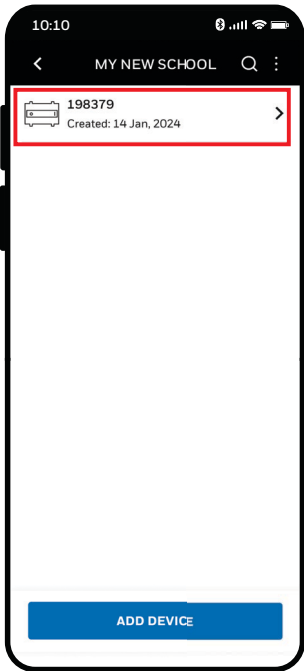


Fig. 38 Devices List Screen

- 3. Edit the device details and tap **SAVE**.

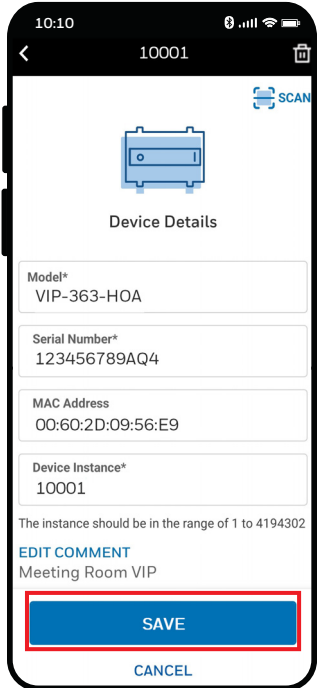
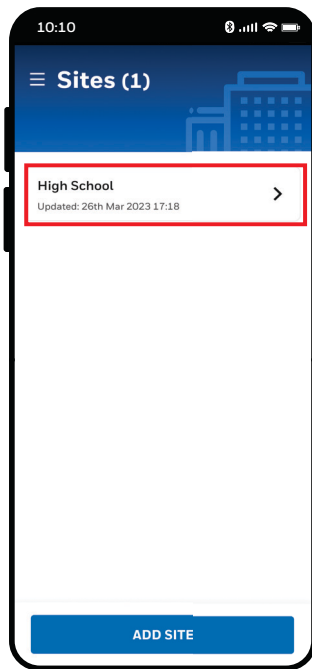


Fig. 39 Device Details Screen

## Delete Device

User can delete device from a site.

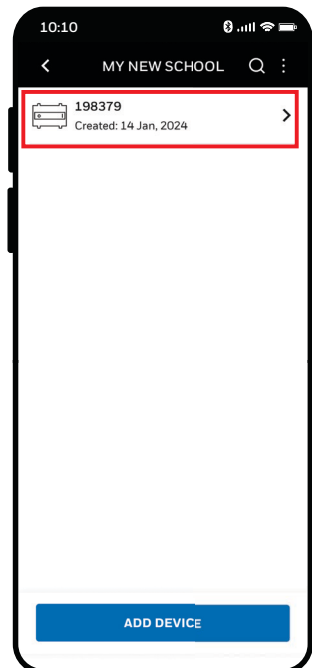
1. From the Site list screen, select a site.



**Fig. 40 Site List Screen**

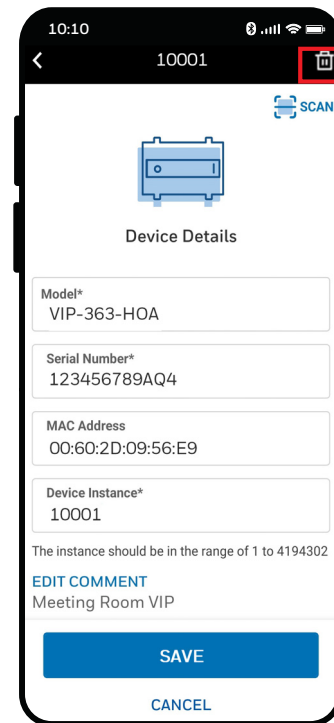
A list of all the devices added to the selected site appears.

2. Select a device from the list.



**Fig. 41 Devices List Screen**

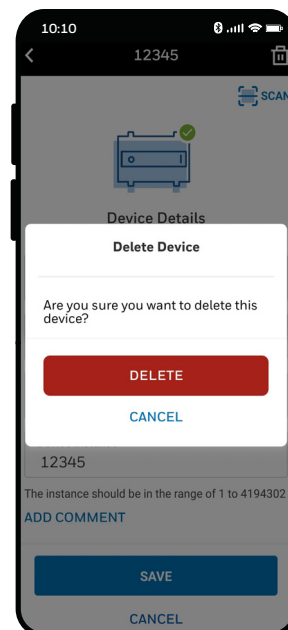
3. Tap the delete icon.



**Fig. 42 Device Details Screen**

A confirmation message appears.

4. Tap **DELETE** on the confirmation message.



**Fig. 43 Delete Device Message Screen**

The app will direct you to site “Site list screen” after deleting the device.

# POINT CHECK-OUT WORKFLOW

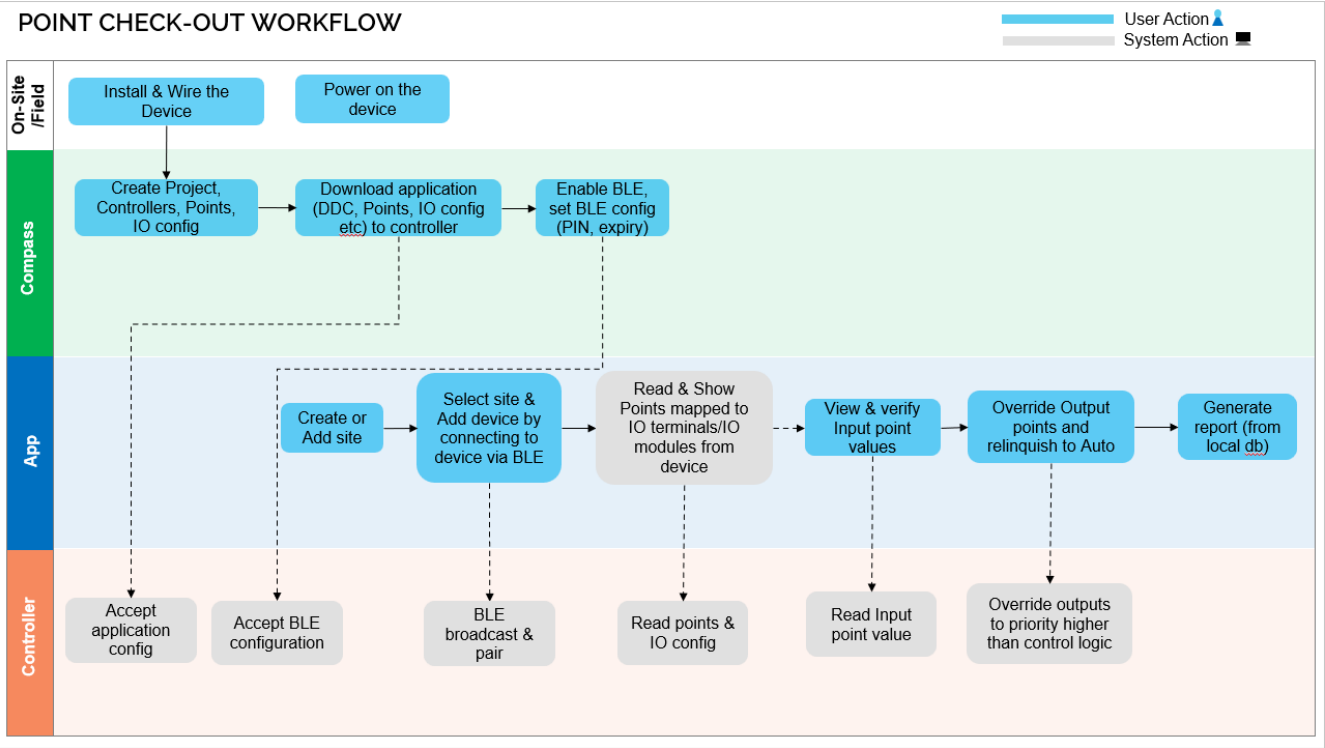


Fig. 44 Point Check-Out Workflow

## Point Check-out

1. The **HOME** screen will appear, tap **Point Check-Out**.

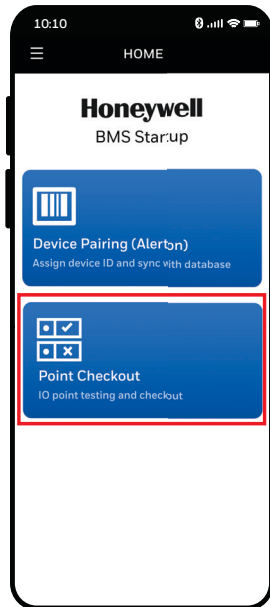


Fig. 45 Home Screen

## Add Site

User should create site locally in the app. To add site refer the [Add Site](#) on page 6.

## Select Site

User can view the sites that are created using Device pairing workflow.

Steps to select the Site:

1. On the **HOME** screen, tap **Point Check-Out**.

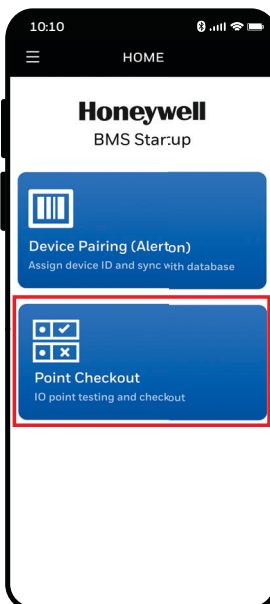


Fig. 46 Home Screen

2. The app will now display all the present sites. Tap **Sites** from the home screen.

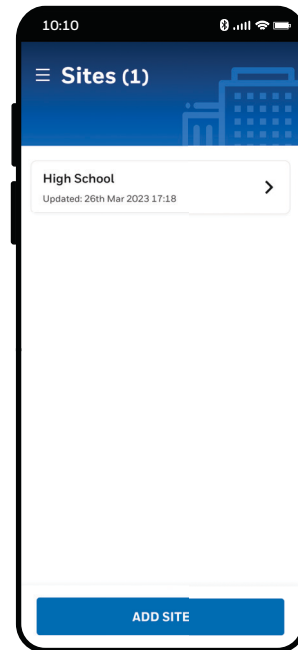


Fig. 47 Home Screen

3. The Site overview will now be displayed.

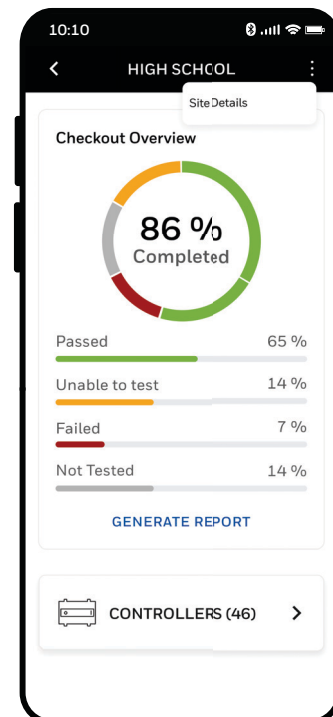
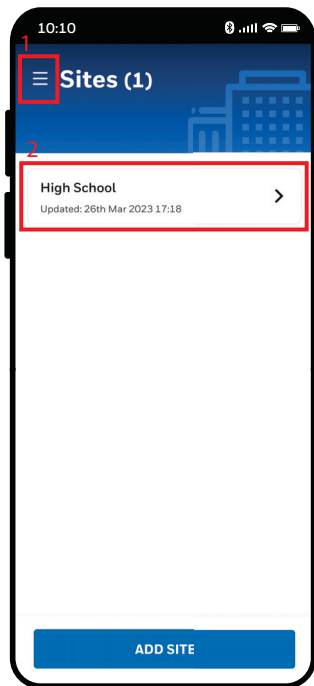


Fig. 48 Site Overview Screen

## Site List Screen

The Site list screen displays a list of created sites. Follow the [Add Site](#) on page 6 if no sites are available.

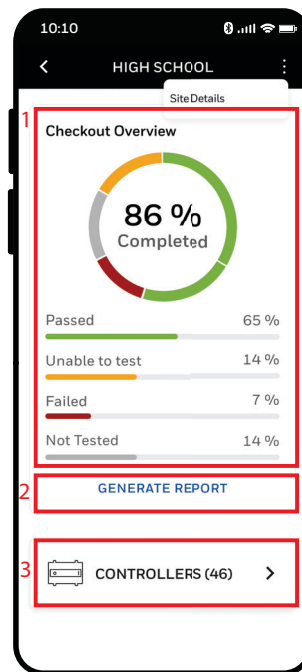


**Fig. 49 Site List Screen**

1. Menu.
2. Sites and last updated date and time.

## Site Overview

The Checkout Overview displays the percentage of the completed device status, the Generate Report, and the devices.



**Fig. 50 Site Overview Screen**

1. It shows the completed point check out % across controllers in that site according:
  - Passed
  - Failed
  - Unable to Test
  - Not Tested
2. Option to create a report for a selection or all of the checked controllers.
3. Number of devices available in the selected site.



## Connect to Device

- From the Checkout Overview, select a controller.  
**Site** is selected as an example.  
Tap on device (**UNITARY**) type.

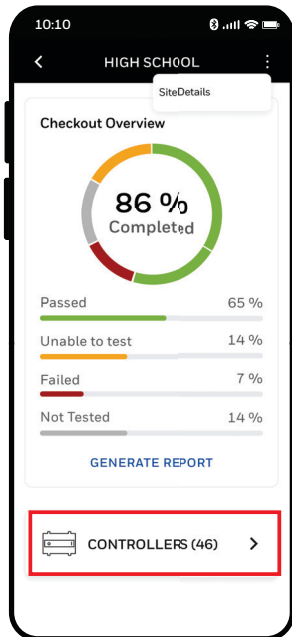


Fig. 51 Site Overview Screen

- A list of devices will appear.



### NOTE:

If the devices are added via the Device pairing workflow and they are with BLE, they will only show up here.

Tap on the device.



Fig. 52 List of Devices



### NOTE:

To look for a specific controller, you can use the search bar at the top

- Tap **CONNECT TO DEVICE**.

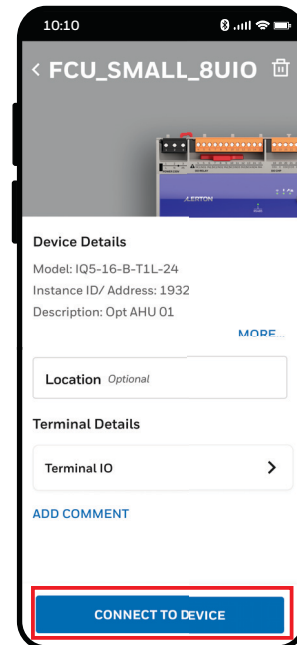


Fig. 53 Device Home Screen



### NOTE:

In this example: **FCU\_SMALL\_8UIO** is the name given by the user while configuring the controller in the tool/compass. Tap on MORE to see Device Details

4. Select **While using the app** or **Only this time** to allow the application to access the device location.

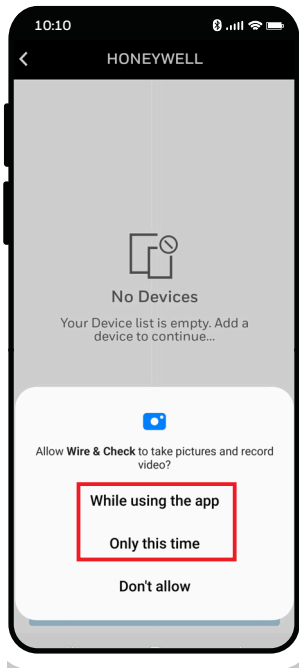


Fig. 54 Location access Screen



**NOTE:**  
The option **Precise** and **Approximate** is optional and you can select per your preference.  
The Location Access pop-up window appears the first time you use the application on your device or when you reinstall the application.

5. Tap **Allow**.



Fig. 55 Location access Pop-up



**NOTE:**  
**For iOS Bluetooth setting:**  
The user must enable Bluetooth on both Bluetooth settings and the Control panel to have a connection with a new controller.

6. The app will search for Bluetooth controllers.

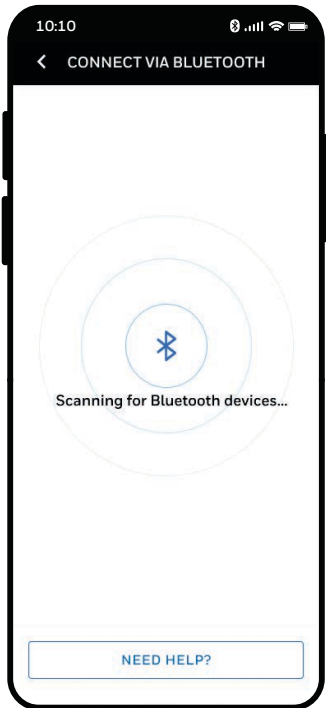


Fig. 56 Scanning for Bluetooth device Screen



**NOTE:**  
Tap **RESCAN**, if you could not find the device.

7. The discovered devices will appear on **OTHER DEVICES** and ready to pair.  
8. Tap the device.

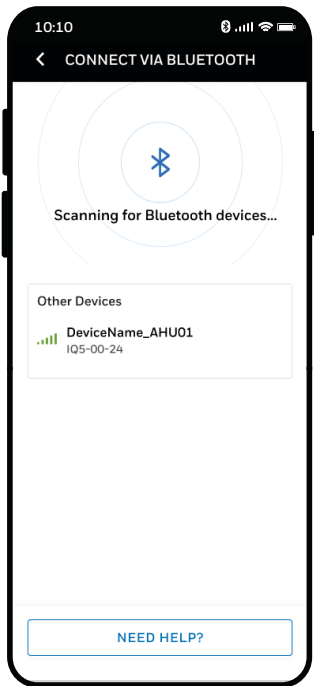


Fig. 57 Connect Via Bluetooth Screen

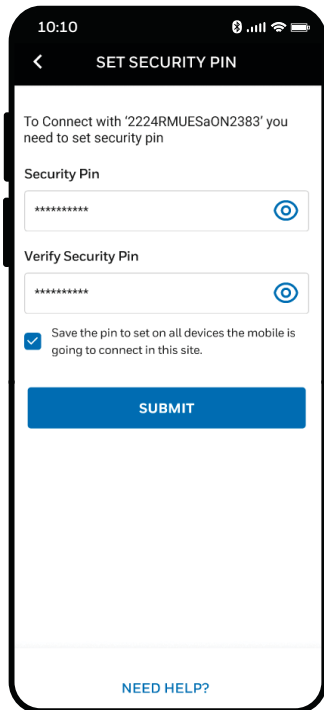
**NOTE:**

The devices may appear under **OTHER DEVICES** or under **SAVED DEVICES** section based on context. If the user connected to the device earlier and chose to save the device, it will appear under **SAVED DEVICES**.

9. You can connect to the device. After completing the steps in the above method, the app will prompt for **Security Pin**.

**For Factory default Device:**

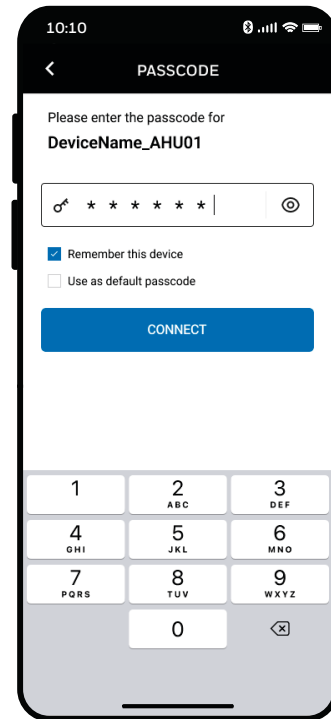
The app will prompt to set the Security Pin. Enter the 8-digit Security Pin in both the fields and tap **SUBMIT**.



**Fig. 58 Set Security Pin Screen**

**For Saved/already connected Device:**

Enter the 8-digit security passcode and tap **CONNECT**.



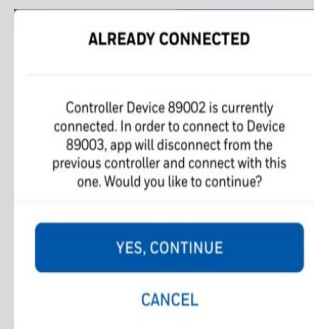
**Fig. 59 Passcode Screen**

**NOTE:**

Consult the Project Manager for the 8-digit security passcode.

**CAUTION**

If the user intends to connect to a new controller without being disconnecting the previous one, the user has to go to the device home screen, where the "Connect to Controller" option is available, choose the new device to connect. A popup message will appear on the screen.



Click Yes, Continue button to connect the another device.

10. The connection will be established, and the user will be navigated to the **Sync In Progress** screen. The data, such as device properties, custom properties, and terminal IO configuration, is synchronized from controller into app. Refer to the figure below for the Sync In Progress screen.

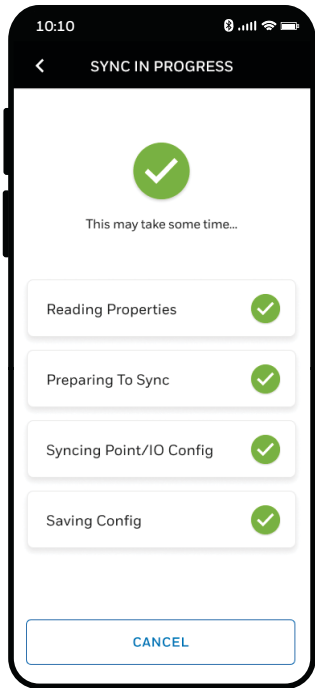


Fig. 60 Sync In Progress Screen

**NOTE:**  
The details in the controller are read and updated in the app, which will take time.

**IMPORTANT:**  
The device description is shown in the BLE list (if configured); if not, the device name is shown.

11. Terminal IO displays after synchronization is completed.

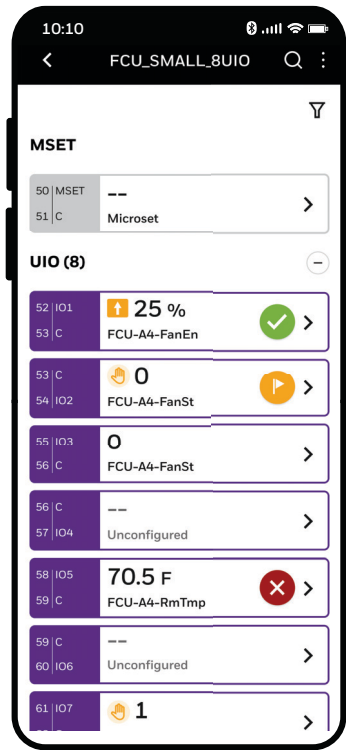


Fig. 61 Terminal IO Main Screen

The device is connected to the Alerton BMS Startup Mobile App. On the Device Home screen, the device will have connected status below the device name.

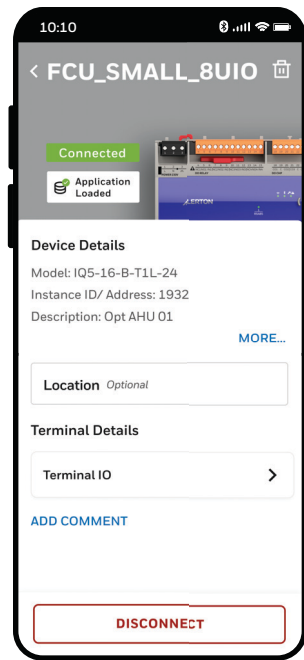
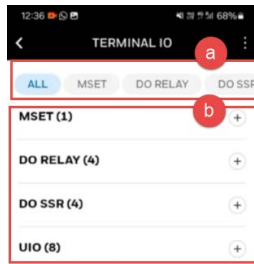


Fig. 62 Device Home Screen

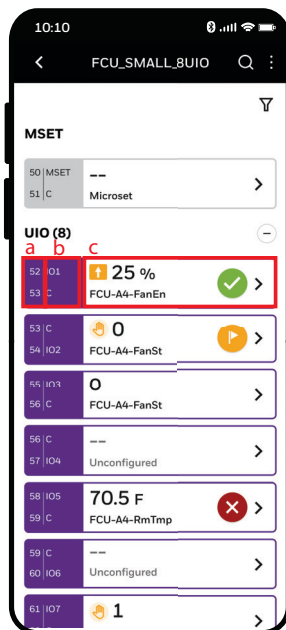
## Terminal IO Overview

The **TERMINAL IO** displays all the physical terminals on the device along with associated BACnet points. You can filter and search for devices.



**Fig. 63 Terminal IO Main Screen**

1. This is the filter for the Terminal IO devices. User can filter the Terminal IO devices from here by selecting ALL, DO RELAY, DO SSR, etc.
2. You can maximize (+) and minimize (-) the terminal IOs to see the number of terminal IOs of the same type and the status.
  - a. The screws as on hardware
  - b. Terminal Names
  - c. Point value & Point name



**Fig. 64 Terminal IO Main Screen**

## Terminal IO

The test options and results will change based on the point type, example: Analog Output, Analog Input, Digital output, and Digital Input point type.

### Analog Output

#### Override Present Value

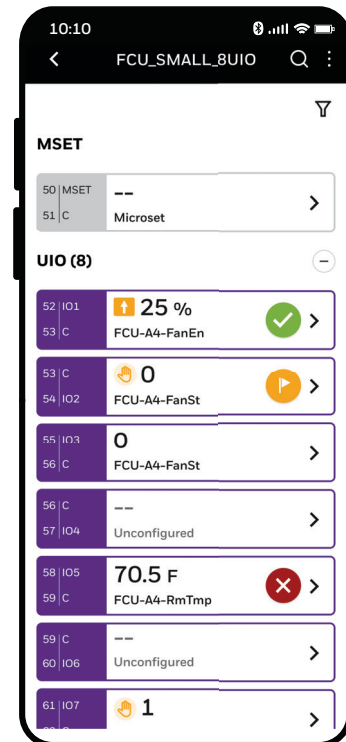
1. View the Terminal IO properties screen.



#### NOTE:

The Terminal UIO 3 is shown as an example.

2. Tap Analog Output type terminal IO.  
Example: Tap UIO 6



**Fig. 65 Terminal IO Home Screen**

3. The IO configuration is inherited from the compass. Check the Actual value, shown below as 2% displayed on the Terminal IO properties. Tap Manual option under the Mode.

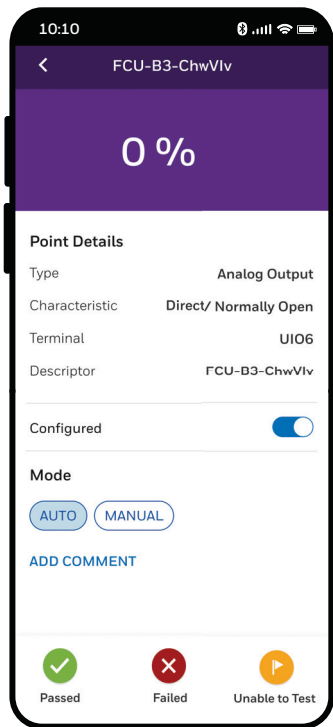


Fig. 66 Terminal IO Property Screen

4. Manual Mode screen will display.

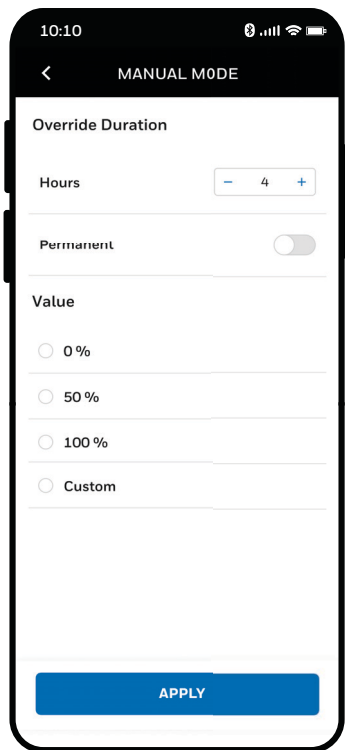


Fig. 67 Manual Mode Screen

5. Select the value and tap APPLY.

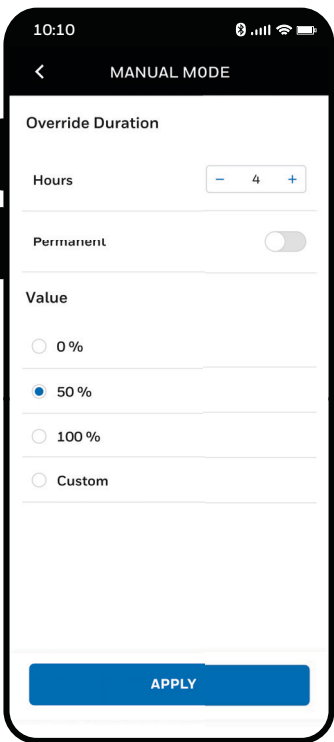


Fig. 68 Set Value Screen

6. The Override value will be changed to with the custom value.

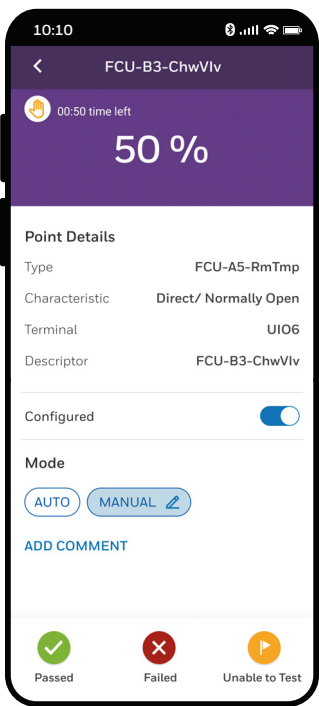


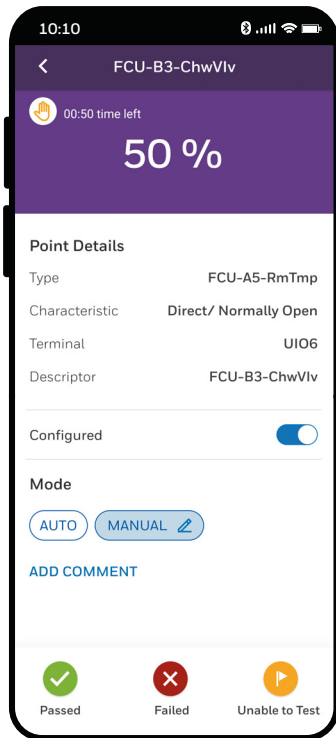
Fig. 69 Terminal IO Property Screen

**NOTE:**

Once the custom value is set, you can see the override hand symbol . This override hand symbol will appear in the Terminal IO main screen and will get updated in the tool after a synchronization.

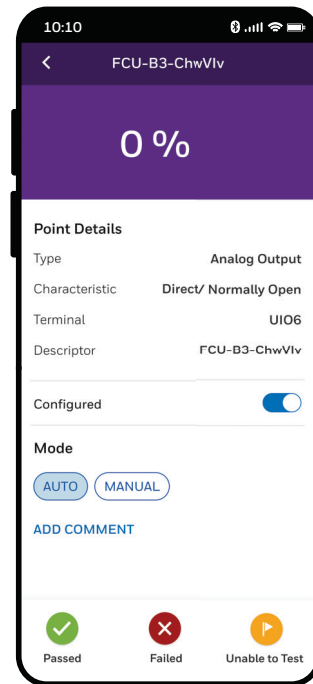
**Set to Auto**

1. Tap **Auto**, to relinquish the override value (reset to original value).

**Fig. 70 Terminal IO Property Screen****NOTE:**

When a point is overridden from app, it will be written at Priority '8'.

2. The terminal IO point returns to its original value and the Auto selection is disabled.

**Fig. 71 Terminal IO Property Screen****NOTE:**

The override hand symbol will be removed, Auto will relinquish the points from overridden state/clears override status.



Add Comment

1. Tap **ADD COMMENT**.

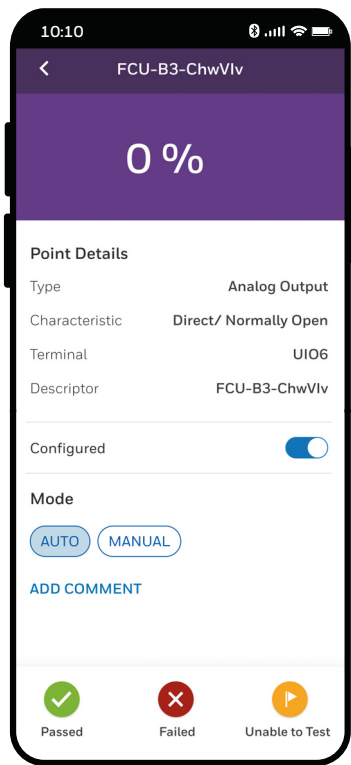


Fig. 72 Terminal IO Property Screen

2. Enter a comment and tap **SAVE**.



Fig. 73 Add Comment Screen

3. The comment will be added.

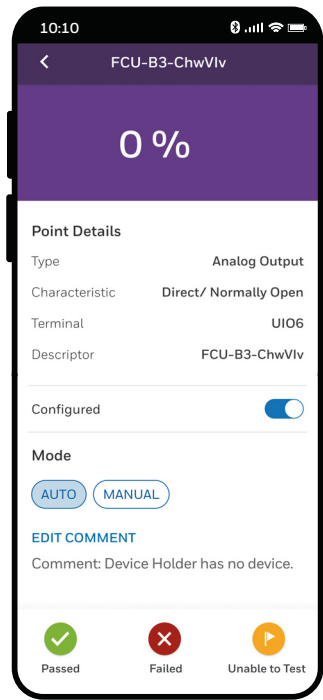


Fig. 74 Terminal IO Property Screen

After completing the terminal IO checkout process and tests, record the terminal IO results. Refer to the [Terminal IO Test Results](#) on page 33.



**NOTE:**

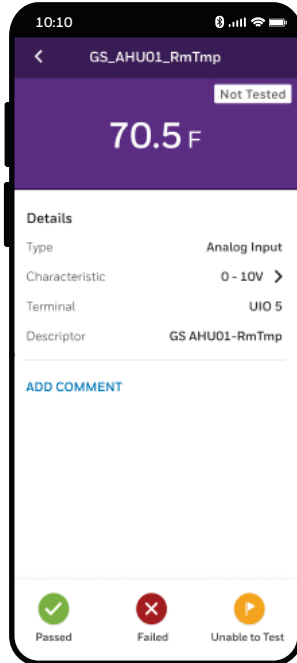
A comment may be included from the Terminal IO properties screen.  
If the comment is already present, the Edit Comment option will display.

## Analog Input

The input value type allows the user to see and add comment.

### Add Comment

1. Tap **ADD COMMENT**.



**Fig. 75 Terminal IO Property Screen**

2. Enter a comment and tap **SAVE**.



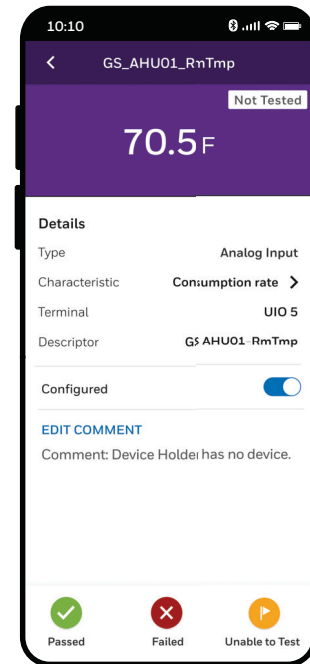
**Fig. 76 Add Comment Screen**



#### NOTE:

A comment may be included from the Terminal IO properties screen. If the comment is already present, the Edit Comment option will display.

3. The comment will be added.



**Fig. 77 Terminal IO Property Screen**

After completing the terminal IO checkout process and tests, record the terminal IO results. Refer to the [Terminal IO Test Results](#) on page 33.

## Binary Output

The digital output point is a binary output which a user can command using 0 and 1 values for Inactive or Active.

### Set Value

1. Follow the steps [Terminal IO](#) on page 23 to view the Terminal IO properties screen.

2. Tap **DO REL** from TERMINAL IO screen.  
Example: Tap DO 1.

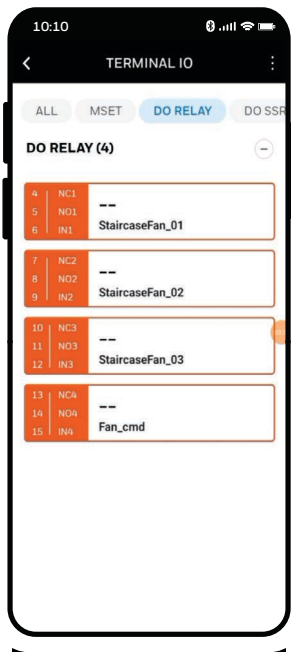


Fig. 78 Terminal IO Home Screen

3. Check the DO Relay point **Value**.  
Tap **Manual** under **Mode**.

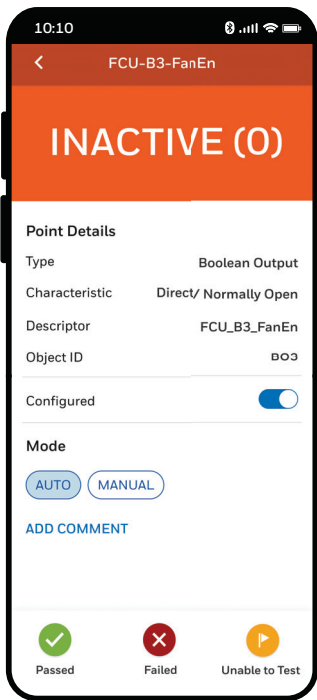


Fig. 79 Terminal IO Property Screen

4. Select the required value and tap **Apply**.

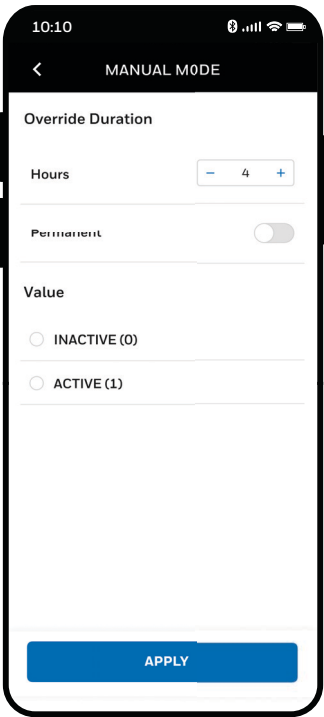


Fig. 80 Terminal IO Property Screen

5. The digital output value changes to the Set Value.

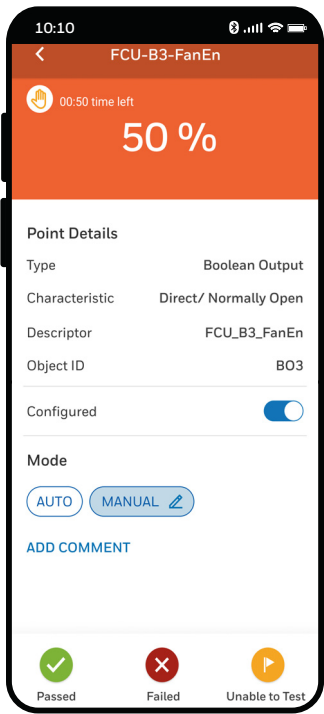


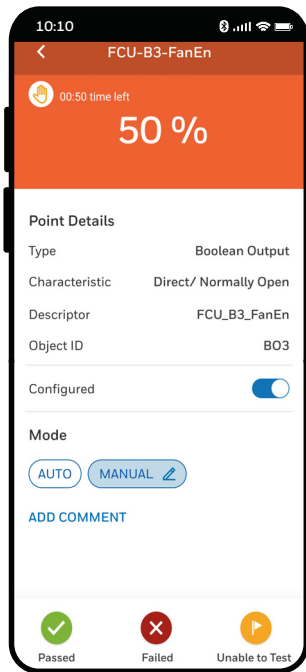
Fig. 81 Terminal IO Property Screen

**NOTE:**

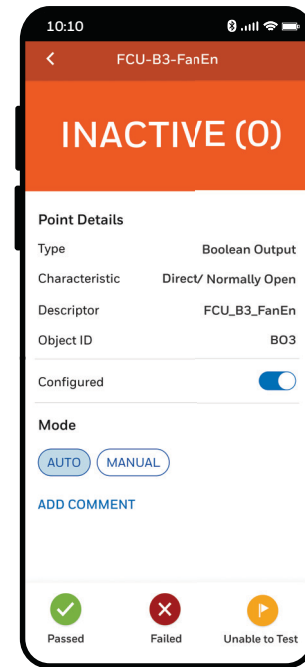
Once the value is set, you can see the override hand symbol 🖐️. This override hand symbol will appear in the Terminal IO main page and will get updated in the tool after a synchronization.

**Set to Auto**

1. Tap **Auto**, to relinquish the checked value which will reset to the original value.

**Fig. 82 Terminal IO Property Screen**

2. The **DO RELAY 3** point returns to its original value and the Auto option is disabled.

**Fig. 83 Terminal IO Property Screen****NOTE:**

The override hand symbol 🖐️ disappears when the user commands the 'Auto' button, and the manually overridden values are cleared. If the user forgets, the override is relinquished as per the timeout configuration selected during override.

Add Comment

1. Tap **ADD COMMENT**.

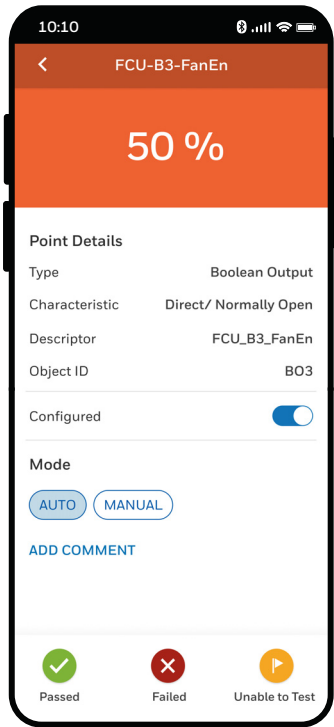


Fig. 84 Terminal IO Property Screen

2. Enter a comment and tap **SAVE**.

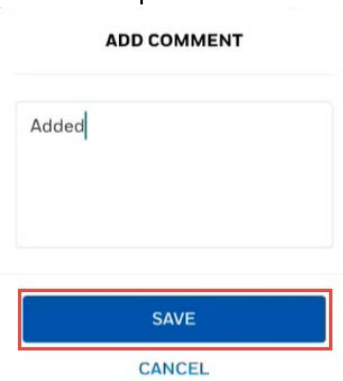


Fig. 85 Add Comment Screen

**NOTE:**  
A comment may be included from the Terminal IO properties screen.  
If the comment is already present, the Edit Comment option will display.

3. The comment will be added.

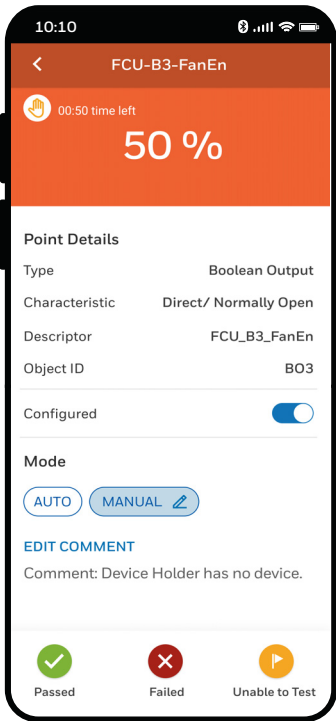


Fig. 86 Terminal IO Property Screen

After completing the terminal IO checkout process and tests, record the terminal IO results. Refer to the [Terminal IO Test Results](#) on page 33.

## Binary Input

The digital input point is a binary input which a user can command using 0 and 1 values for open/ on or close/ off as shown below.



### NOTE:

The values 0 and 1 can be defined as open/on or close/off from the tool.

## View digital input point

1. Follow the steps [Terminal IO](#) on page 23 to view the Terminal IO properties screen.
2. Tap Digital Input type terminal IO.  
Example: Tap UIO 3.

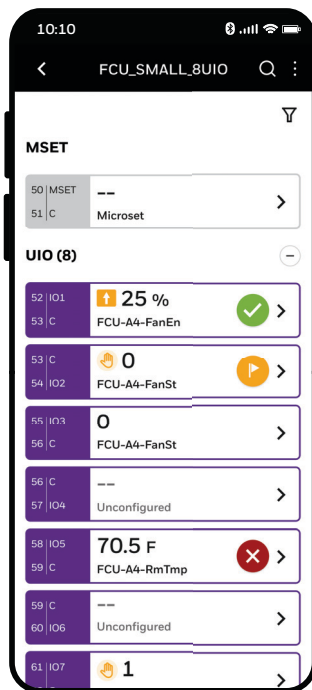


Fig. 87 Terminal IO Home Screen

3. The Point value is retrieved from controller.  
Check the Actual value, shown below as 0 is on the Terminal IO.

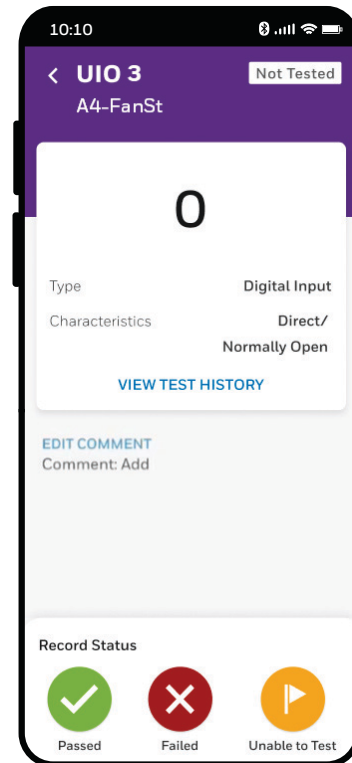


Fig. 88 Terminal IO Property Screen

## Status of Point

The status of points indicates the controller status on the terminal IO.

Table 2. Status of point

Icon	Description
In Alarm	Indicates if a point is in alarm or not.
Fault	The corresponding point indicates fault status if the physical input is not wired/connected to the terminal.
Out Of Service	Indicates if a point is out of service.
Override	Indicate if a point present value is overridden manually.

Add Comment

1. Tap **ADD COMMENT**.

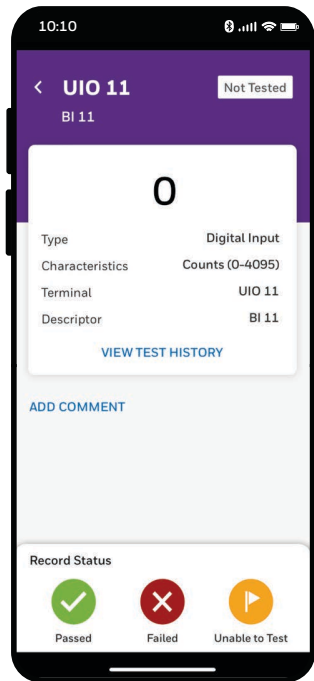


Fig. 89 Terminal IO Property Screen

2. Enter a comment and tap **SAVE**.



Fig. 90 Add Comment Page



**NOTE:**

A comment may be included from the Terminal IO properties screen.  
If the comment is already present, the Edit Comment option will display.

3. The comment will be added.

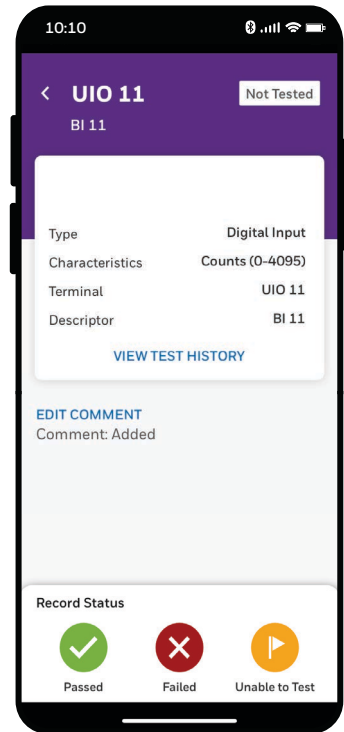


Fig. 91 Terminal IO Property Screen

After completing the terminal IO checkout process and tests, record the terminal IO results. Refer to the [Terminal IO Test Results](#) on page 33.



## Terminal IO Test Results

Once the test has been completed, the user can record the results by selecting Record Status:

- Passed
- Failed
- Unable to test

The procedure for recording the status is the same for all terminal IO point types.

1. Tap on one of the **Record Status** icons as per your observation.

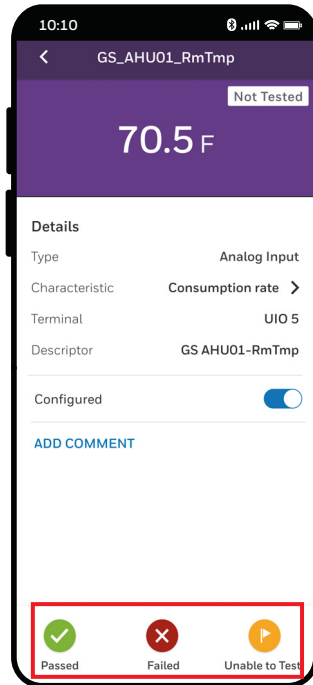





Fig. 92 Terminal IO Property Screen



### NOTE:

The terminal IO UIO 1, analog output is used as an example.

Table 3. Record Status Description

Icon	Description
 Passed	If the test result is acceptable, tap <b>Passed</b> after completing the test.
 Failed	If the test result is not acceptable, tap <b>Failed</b> after completing the test, select the reasons and submit.
 Unable to Test	If the test is interrupted or unable to test the Terminal IO, tap <b>Unable to Test</b> .

2. Follow the steps below according to the **Record Status**.  
**If the test Passed:**

- a. Tap **Passed**, it will navigate to the Terminal IO Home Screen.

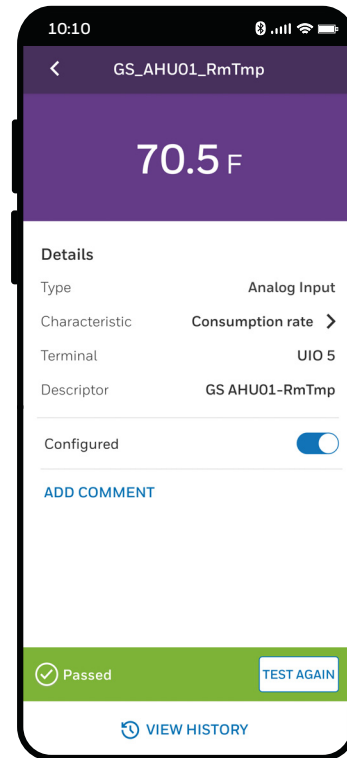


Fig. 93 Terminal IO Home Screen

**If the test Failed:**

- a. Tap **Failed**, it will navigate to the **FAILED** screen. Select the reason(s) and tap **SUBMIT**.

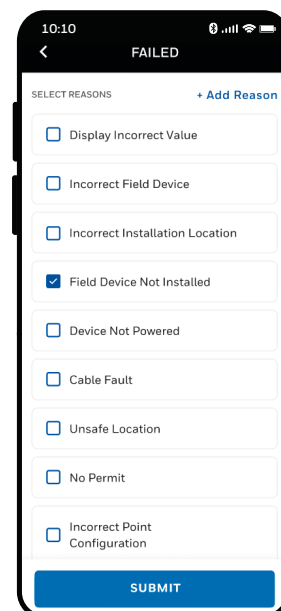


Fig. 94 Failed Screen



**NOTE:**

The user can also customize and add the reason. To add the new reason, which is not listed below, refer to the [Add a reason](#) on page 35.

- b. The Terminal IO home screen will display with the failed status points.

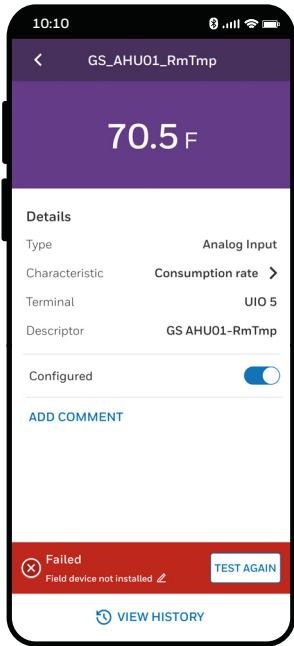


Fig. 95 Terminal IO Home Screen

**Unable to Test:**

- a. If the user is unable to test the IO, tap **Unable to Test**. User will be sent to the **TERMINAL IO** home screen seen below.

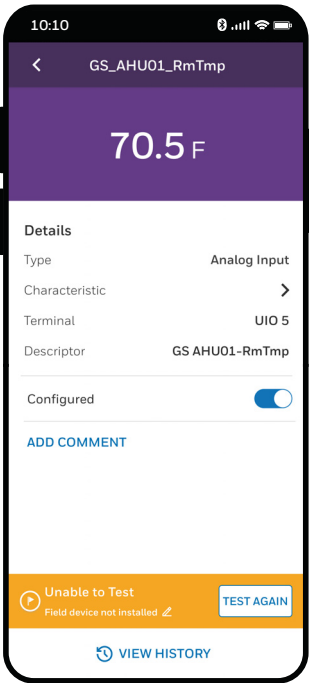


Fig. 96 Terminal IO Home Screen

## Add a reason

If the user feels the entered values are wrong and clicks on Failed record status. The user can select the reason for the failed status from the predefined reasons or add a reason by clicking the ADD Reason.

1. Tap **+Add Reason**.

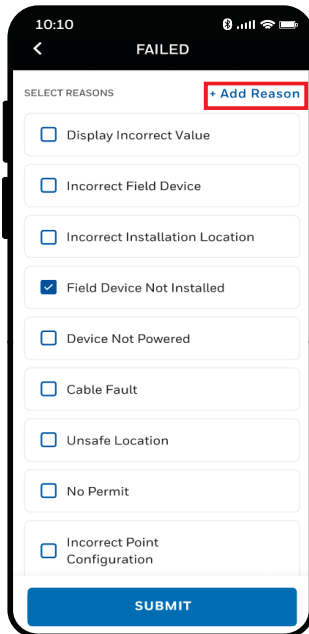


Fig. 97 Failed Screen

2. Enter a reason then tap **SAVE**.

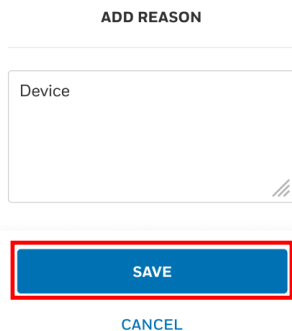


Fig. 98 Add Reason Dialog Box



### NOTE:

Newly added reason applicable for a selected site only.

## View Test History

**Steps to view the test history of the Terminal IO:**

1. Go to the Terminal IO Property Screen.
2. Tap **VIEW TEST HISTORY**.

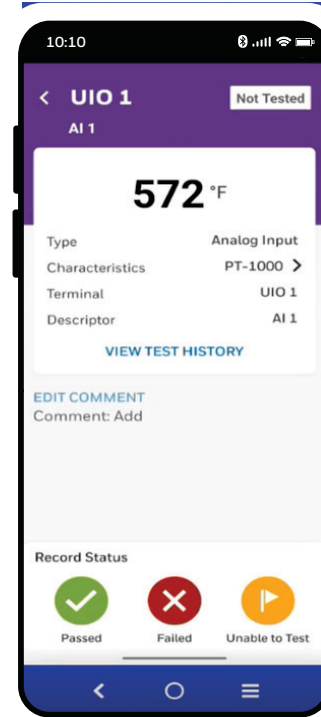


Fig. 99 Terminal IO Property Screen

3. The **TEST HISTORY** screen will be displayed.

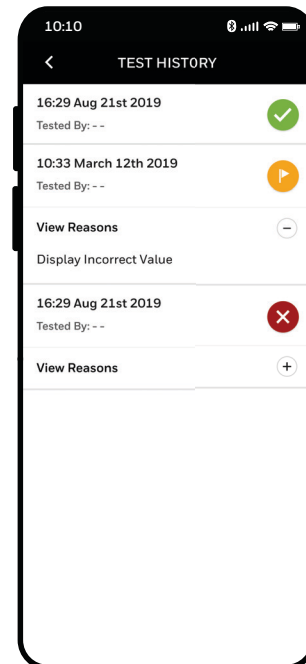


Fig. 100 History Screen

## Generate Report

This option will create a report for a selection or all of the checked controllers. The report has all of the activities such as Status of Controllers, Status of Terminal IO, etc.

### Steps to generate a report:

1. Go to the Site Overview page and tap **GENERATE REPORT**.

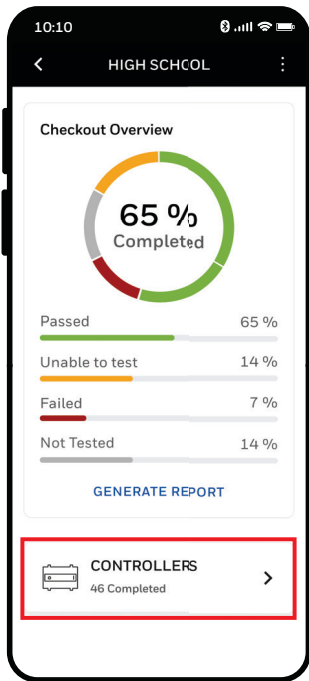


Fig. 101 Site Overview Screen

2. Select Devices and tap **NEXT**.

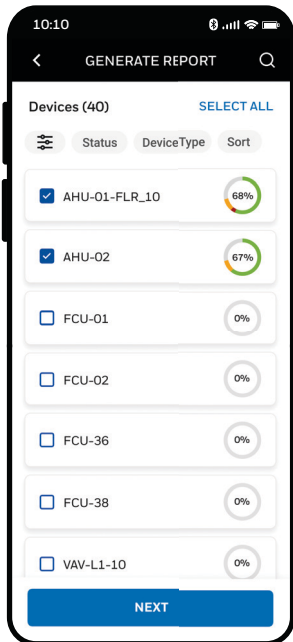


Fig. 102 Generate Report Screen



### NOTE:

For a report of all of the devices, tap on **SELECT ALL**.

3. Tap to **Report Name** to enter a name of the report. The **Description** is optional.

Tap **GENERATE REPORT**.

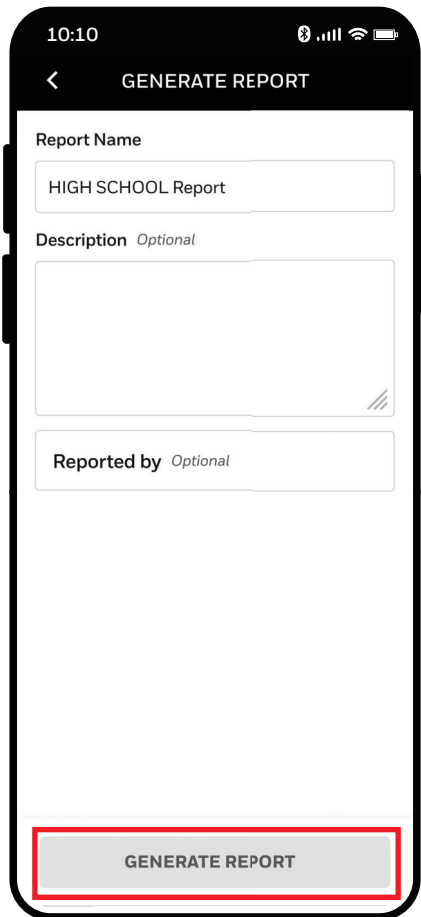


Fig. 103 Generate Report Screen

4. A **Report generated successfully** message will appear and then the screen will navigate to the **GENERATE REPORT** screen. Here the user will be able to share and close the report.

5. To share the report tap **SHARE**.

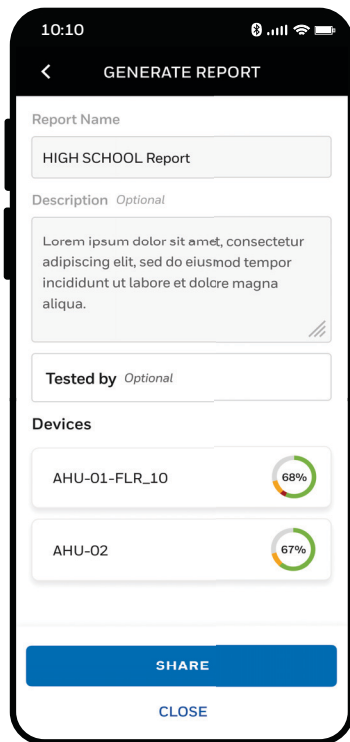


Fig. 104 Generate Report Screen



**NOTE:**

Tap **CLOSE** to return to the Site Overview Screen.

6. The Share option will prompt the user to Copy, Print, and share the report through applications that are installed on their mobile device. Tap an application of your choice.



Fig. 105 Share option



**NOTE:**

The file format will be .xlsx

## SETTINGS

You can access the Settings menu to view Logs, App details, and change the unit system.

1. Tap menu from the Site list screen.

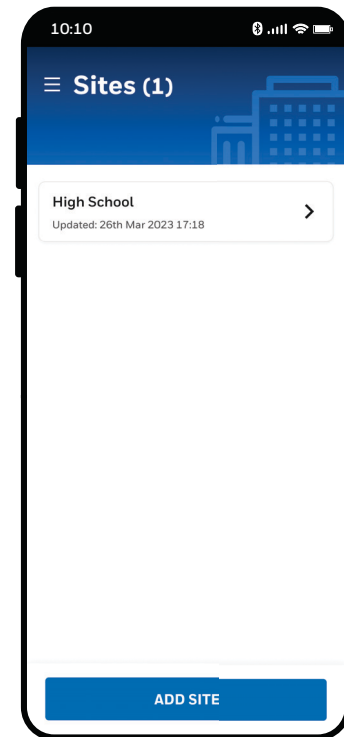


Fig. 106 Site List Screen

2. Tap **Settings**.

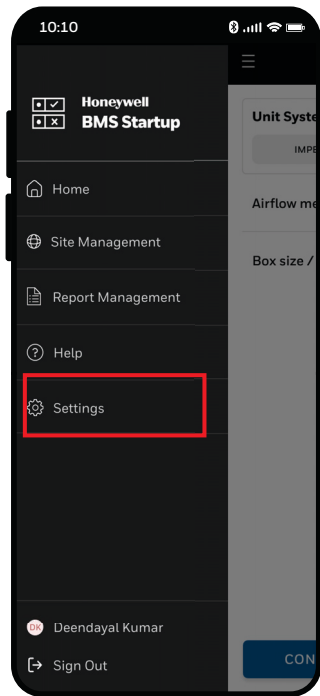


Fig. 107 Menu Screen

3. The App **Settings** will display. From this menu you can:

- Select **About** to view the **Privacy Policy** and **Terms of Use**.
- Select **Logs** to view the logs.

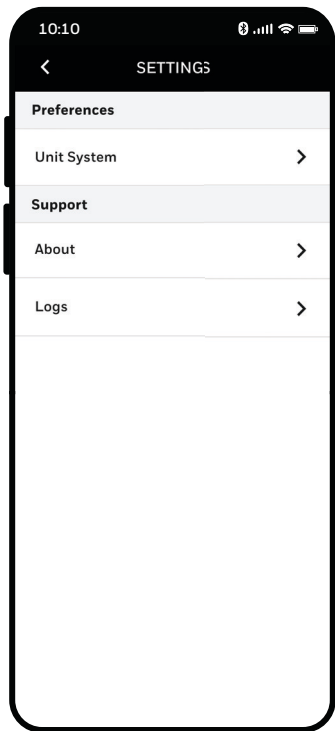


Fig. 108 Settings Screen

About

1. Go to the Settings main screen.
2. Tap **About** from the **SETTINGS** screen.

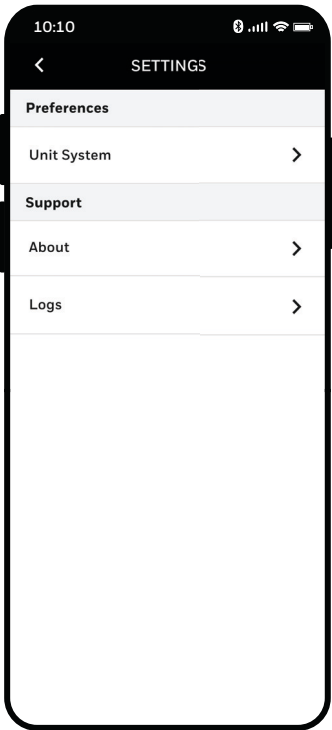


Fig. 109 Settings Screen

3. You can check the Copyright, App Version, Privacy Policy, Terms of Use, and User Consent.

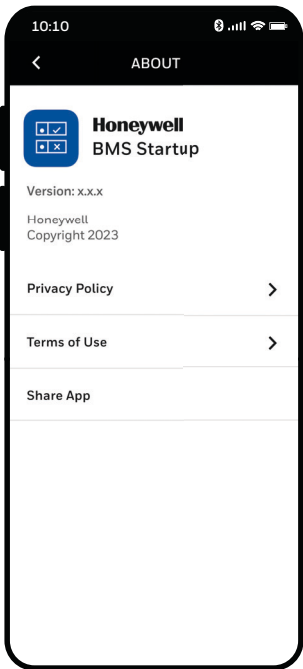
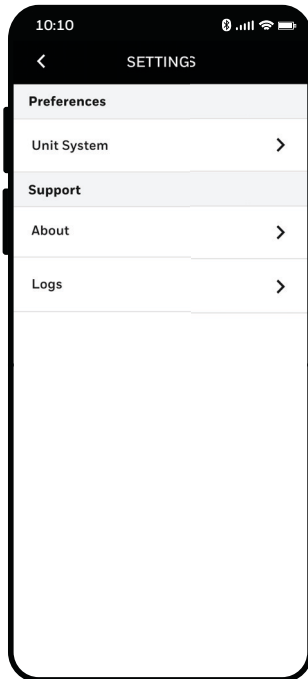


Fig. 110 About Screen

## Logs

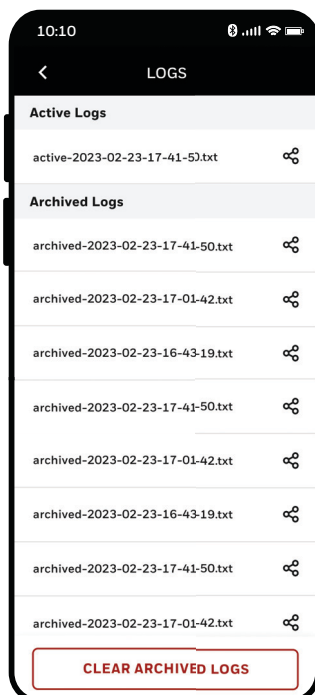
The logs will help to identify and resolve any app-related issues. These logs will be useful when interacting with the tech support team.

1. Go to the Settings main screen.
2. Tap **Logs** from the **SETTINGS** screen.



**Fig. 111 Settings Screen**

3. You can check the active logs and can share the log file.

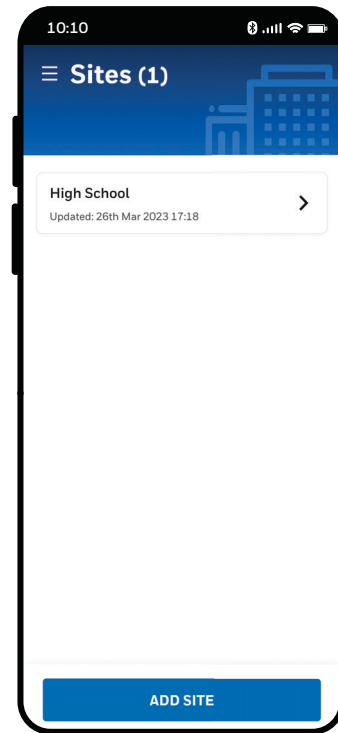


**Fig. 112 Settings Screen**

## SITE MANAGEMENT

### Select Site

1. From the Site list screen, tap a site you want to select.



**Fig. 113 Site List Screen**

Edit site

1. Tap menu  from the Site list screen.

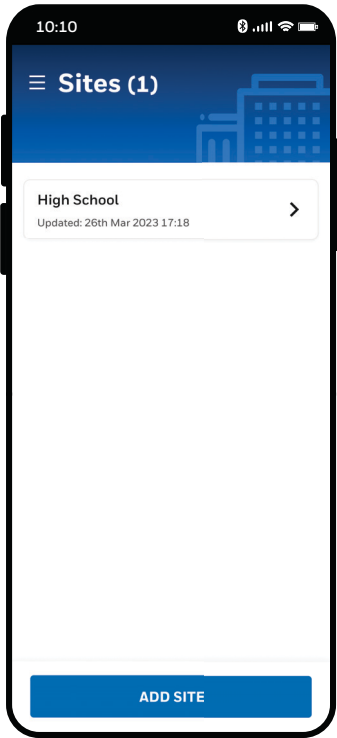


Fig. 114 Site List Screen

3. Tap on the site that needs to be edited.

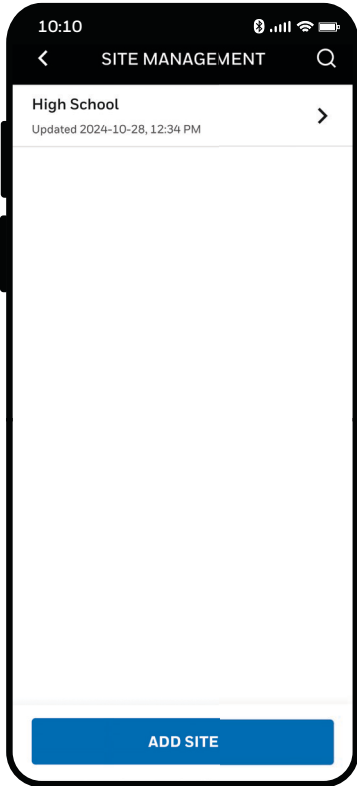


Fig. 116 Site Management Screen

2. Tap **Site Management**.

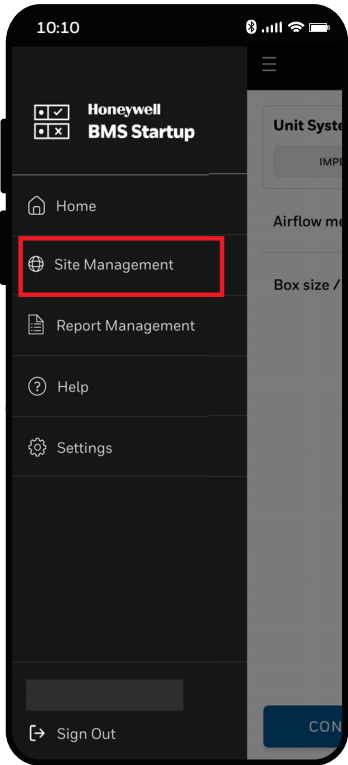


Fig. 115 Menu Screen

4. Edit the site details and tap **SAVE**.

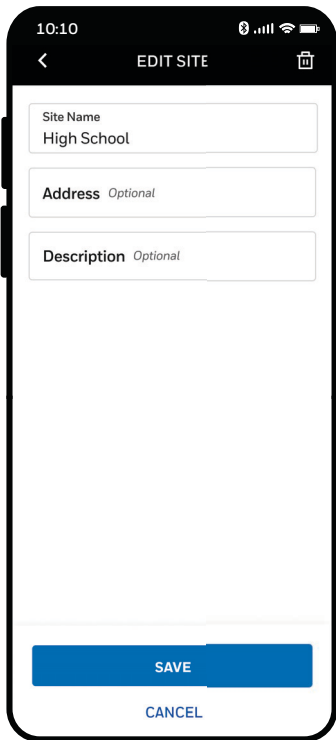


Fig. 117 Edit Site Screen



## Delete site


1. Tap Menu  from the Site list screen.



Fig. 118 Site List Screen

2. Tap **Site Management**.

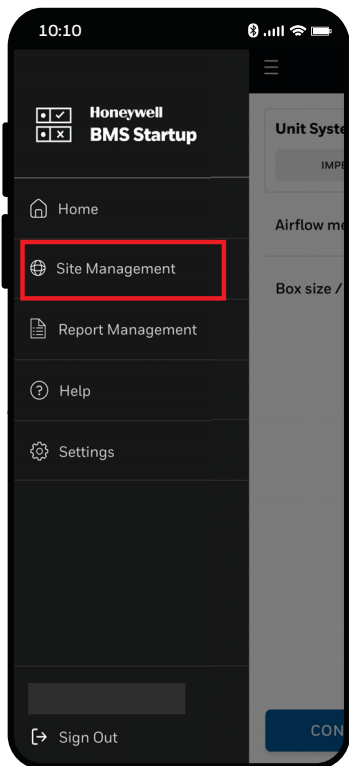


Fig. 119 Menu Screen

3. Tap on the site that needs to be deleted.

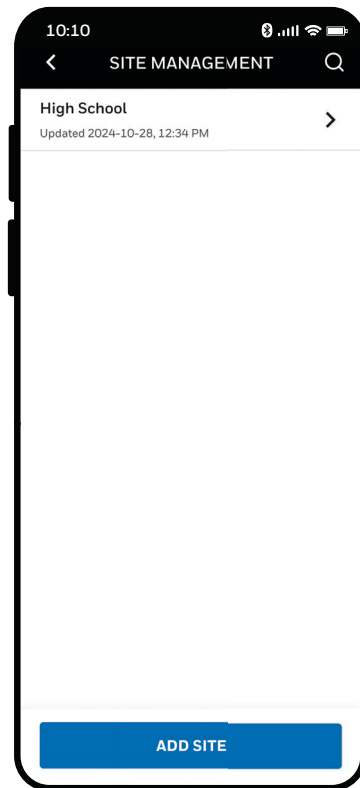


Fig. 120 Site Management Screen

4. Tap the delete icon.

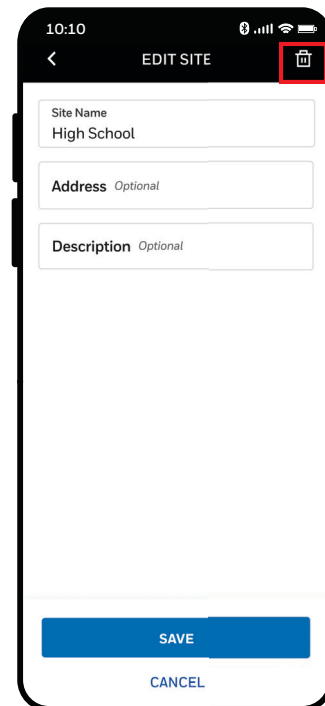
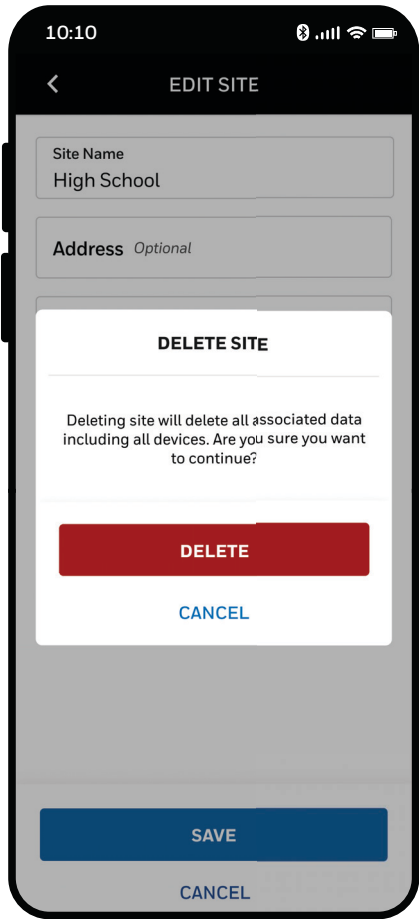


Fig. 121 Edit Site Screen

A confirmation message will appear. Tap **DELETE** on the confirmation message.



**Fig. 122 Delete Site Message Screen**

The app will direct you to “Site List Screen” after deleting the site.