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1 ABOUT THIS MANUAL

This manual applies to 963 version 3.0 software. It provides a description of how to use the 963. It is intended for a reader with no knowledge of the 963 who operates it on a daily basis. It is assumed that the system has already been set up and engineered to suit user requirements, and the user is familiar with basic computer use, and has knowledge of BMS. It is divided into several sections.

About 963
This section describes 963, and how it works.

The 963 Window
This section explains the different parts of the 963 Window.

Using 963
This section describes how to use 963 once it has been installed and engineered.

After having read and fully understood this manual the user will be familiar with the 963 Supervisor, the environment in which it operates, making changes to HVAC equipment parameters, coping with incoming alarms, and all other aspects of using the 963 on a day-to-day basis.

For details about using the 963 when accessing it from a web browser see the 963 Web User Guide (TC200631).

Other relevant documentation is:

- Printable copy of this Help file in PDF format (963 User Guide)
- 963 Data Sheet (TA200636)
- 963 Web User Guide (TC200631)
- Product Data Sheets

1.1 Conventions Used in this Manual

There are numerous items and instructions in this manual, the conventions below are designed to make it quick and easy to find and understand the information.

- Menu commands are in **bold** type.
- Buttons, and options in dialogue box that you need to select are in **bold** type.
- The names of text boxes and dialogue boxes are in **bold** type.
- Key combinations that you should press appear in normal type. If joined with a plus sign (+), press and hold the first key while you press the remaining one(s). For example CTRL+P indicates holding down the control key while pressing P.
- Text you should enter is in *Italic* type.
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Technical Publications
Please send any comments on this or any other Trend technical publication to techpubs@trendcontrols.com
2 ABOUT 963

Once engineered the 963 Supervisor provides the user with a system wide control panel with the facility to monitor and change the Building Management System (BMS) ensuring that the HVAC equipment operates safely and efficiently.

The use of colour graphics specially designed for the system displays this information in a simple and effective way. Graphs and pages of text information can be used to supplement monitored information. A fast and efficient communications network allows this information to be obtained from HVAC equipment that may scattered miles apart in different buildings, on other sites, or even other countries.

It enables the user to monitor HVAC equipment/building services, and make changes to the way the building is controlled using colour graphics displays. Fault reporting, analysis, and data recording features promote efficient HVAC equipment operation and effective energy use.

The information and adjustments available to a user can be exactly tailored to that user’s needs. This means that an operator is never presented with more data or options than he or she requires, thus eliminating a major source of potential confusion. However, for those whose job function demands it, access can be provided to detailed information on the BMS.

2.1 The 963 Window

The 963 Window consists of six areas:

- **Data Display**
  The Data Display is where the 963 displays the selected information. In the example above, a schematic page is displayed, but information from other areas of 963 may also be displayed depending which button is selected, for example the Alarm Viewer, web pages etc.

- **Menu Bar**
  The Menu Bar contains 963’s menus, which provide access to the application’s various features.
About 963

Navigator
The **Navigator** appears on the left of the **963 Window**, and provides a way of selecting the information that appears in the **Data Display**. For example, if a schematic page is displayed the **Navigator** will enable the page that is displayed to be selected, where as if the **User Display** is selected; it enables a particular user or workgroup to be selected.

Network Comms Status Lights
The **Network Comms Status Lights** appear at the bottom of the **963 Window**. They provide information about the status of communications.

Selection Buttons
The **Selection Buttons** appear at the bottom of the **Navigator**. They provide access to the 963’s different displays. Access to these buttons can be protected, preventing unauthorised users accessing the displays.

Status Bar
The **Status Bar** is located at the bottom of the **963 Window** and provides information about the version of 963 running, and the name of the user that is currently logged on as well as the current date and time.
2.1.1 Data Display

The Data Display is where 963 displays the information specified in the Navigator. The Selection Buttons determine the type of data displayed, and the selection made has been chosen. There are eight different type of display that can appear in the data display.

- Alarm Viewer
- Configuration Mode Display
- Device Viewer
- Web Browser Display
- Event Scheduler Display
- Diary Display
- Schematic Page Display
- User Display

2.1.1.1 Alarm Viewer

The Alarm Viewer, shown below, displays the alarms that have been received. These alarms can be filtered by type to reduce the amount of data displayed.

It has four tabs:

**Alarm History**

The Alarm History tab stores all the alarms after they have been processed, whether or not they have been actioned by the user. The alarms can be viewed in Chronological View order or a Summary View.

The Summary View gives a count for each alarm type for each point, providing the following information: The label of the module that generated the alarm, its priority, the device that sent the alarm, a description of the alarm, and a count of how many alarm of that type have occurred.

The Chronological View displays an alarm history sorted by time order, providing the following information: The time the alarm occurred, its priority, the label of the module that generated the alarm, a description of the alarm, the device that sent the alarm, and any text entered by the user when it was acknowledged.
Clicking any alarm gives a pop-up display containing details about the alarm. The alarms in both view are determined by the currently selected group or filter in the **Navigator**. The list can be further filtered using a drop-down list of standard options. The list is colour coded to indicate whether the alarm is current. Red indicates that the alarm is current. Icons are used to indicate whether the alarm is a set alarm or a cleared alarm. A red bell indicates a set alarm, and a green bell indicates a cleared alarm. If the alarm has been actioned by the user, the bell will appear with a tick over it. The table below shows the different icons.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Set alarm that has not been actioned." /></td>
<td>Set alarm that has not been actioned.</td>
</tr>
<tr>
<td><img src="image" alt="Set alarm that has been actioned." /></td>
<td>Set alarm that has been actioned.</td>
</tr>
<tr>
<td><img src="image" alt="Cleared alarm that has not been actioned." /></td>
<td>Cleared alarm that has not been actioned.</td>
</tr>
<tr>
<td><img src="image" alt="Cleared alarm that has been actioned." /></td>
<td>Cleared alarm that has been actioned.</td>
</tr>
</tbody>
</table>

### Alarm Priority Statistics

The **Alarm Priority Statistics** tab displays all the alarms grouped by priority in the form of a bar, or pie chart.

### Incoming alarms

The **Incoming Alarms** tab contains the last 100 alarms to be received as they arrive. The list is colour coded to indicate whether the alarm is current. Red indicates that the alarm is current. Icons are used to indicate whether the alarm is a set alarm or a cleared alarm. A red bell indicates a set alarm, and a green bell indicates a cleared alarm. If the alarm has been actioned by the user, the bell will appear with a tick over it. The table below shows the different icons.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Set alarm that has not been actioned." /></td>
<td>Set alarm that has not been actioned.</td>
</tr>
<tr>
<td><img src="image" alt="Set alarm that has been actioned." /></td>
<td>Set alarm that has been actioned.</td>
</tr>
<tr>
<td><img src="image" alt="Cleared alarm that has not been actioned." /></td>
<td>Cleared alarm that has not been actioned.</td>
</tr>
<tr>
<td><img src="image" alt="Cleared alarm that has been actioned." /></td>
<td>Cleared alarm that has been actioned.</td>
</tr>
</tbody>
</table>

The list displays the time the alarm occurred, its priority, a description of the alarm, and the module label, site, Lan, and device where the alarm was generated. Clicking any alarm gives a pop-up display containing details about the alarm.

### Set up

The **Set up** tab enables certain settings relating to alarm handling to be defined.

Access to this display can be restricted.
2.1.1.2 Configuration Mode Display

The Configuration Mode Display, shown below, displays the configuration mode on IQ system devices that support the feature. The required devices is selected from the Navigator which displays a tree view of the system to which 963 is connected. Clicking a controller will cause it to enter configuration mode, and the configuration prompts displayed in the Data Display.

Once in this mode, simple adjustments can be made to the strategy. When in configuration mode, 963 is effectively converted into a terminal, all the screen prompts originate from the controller, and all keyboard inputs are sent to the controller when the ENTER key is pressed.

Access to this display can be restricted.
2.1.1.3 Device Viewer

The **Device Viewer**, shown below, enables inputs, outputs, adjustments, time zones, and critical alarms from the part of the system selected in the **Navigator** to be displayed, and for values to be adjusted, or graphed. E.g. if the internetwork is selected, all values from the internetwork are displayed. If a particular Lan is selected only values from that Lan are displayed. The display can be filtered further so that only modules whose label matches a search string are displayed. The display is colour coded to indicate whether the alarm is current. Red indicates that the alarm is current. Once the values have been displayed it is possible to adjust values, or display a graph.

It contains a number of columns that display the values of the inputs, outputs, adjustments, time zones, and critical alarms.

<table>
<thead>
<tr>
<th><strong>Column</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Icon</td>
<td>Contains an icon that indicates the module type.</td>
</tr>
<tr>
<td>Sensor Modules</td>
<td></td>
</tr>
<tr>
<td>Digital Input Modules</td>
<td></td>
</tr>
<tr>
<td>Virtual Sensor Modules</td>
<td></td>
</tr>
<tr>
<td>Critical Alarm Modules</td>
<td></td>
</tr>
<tr>
<td>Knob Modules</td>
<td></td>
</tr>
<tr>
<td>Switch Modules</td>
<td></td>
</tr>
<tr>
<td>Time zone Modules</td>
<td></td>
</tr>
<tr>
<td>Analogue Driver Modules</td>
<td></td>
</tr>
<tr>
<td>Digital Driver Modules</td>
<td></td>
</tr>
<tr>
<td>Label</td>
<td>The module label.</td>
</tr>
<tr>
<td>Column</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>Value</td>
<td>The current value of the module.</td>
</tr>
<tr>
<td>Units</td>
<td>The value’s engineering units.</td>
</tr>
<tr>
<td>Item</td>
<td>A code indicating the module type and number (e.g. S1 specifies Sensor module number 1)</td>
</tr>
<tr>
<td></td>
<td>S Sensor Modules</td>
</tr>
<tr>
<td></td>
<td>I Digital Input Modules</td>
</tr>
<tr>
<td></td>
<td>W Switch Modules</td>
</tr>
<tr>
<td></td>
<td>Z Time zone Modules</td>
</tr>
<tr>
<td></td>
<td>K Knob Modules</td>
</tr>
<tr>
<td></td>
<td>D All Driver modules for IQ system sites, Analogue Driver Modules for BACnet sites</td>
</tr>
<tr>
<td></td>
<td>J Digital Driver Modules for BACnet sites</td>
</tr>
<tr>
<td></td>
<td>X Virtual Sensor Modules</td>
</tr>
<tr>
<td></td>
<td>M Critical Alarm Modules</td>
</tr>
<tr>
<td>LAN</td>
<td>The Lan number of the controller containing the module</td>
</tr>
<tr>
<td>OS</td>
<td>The network address of the controller containing the module</td>
</tr>
<tr>
<td>Tele</td>
<td>The phone number or IP address used to address the site containing the module.</td>
</tr>
</tbody>
</table>

The display also contains a number of buttons that enable the types of modules displayed to be selected.

<table>
<thead>
<tr>
<th>Icon</th>
<th>What is Displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Sensors" /></td>
<td>Sensors</td>
</tr>
<tr>
<td><img src="image" alt="Digital Inputs" /></td>
<td>Digital Inputs</td>
</tr>
<tr>
<td><img src="image" alt="Virtual sensors" /></td>
<td>Virtual sensors (calculated MKT values)</td>
</tr>
<tr>
<td><img src="image" alt="Critical Alarms" /></td>
<td>Critical Alarms</td>
</tr>
<tr>
<td><img src="image" alt="Knobs" /></td>
<td>Knobs</td>
</tr>
<tr>
<td><img src="image" alt="Switches" /></td>
<td>Switches</td>
</tr>
<tr>
<td><img src="image" alt="Time Zones" /></td>
<td>Time Zones</td>
</tr>
<tr>
<td><img src="image" alt="Analogue Driver" /></td>
<td>Analogue Driver</td>
</tr>
<tr>
<td><img src="image" alt="Digital Driver" /></td>
<td>Digital Driver</td>
</tr>
<tr>
<td><img src="image" alt="Refresh" /></td>
<td>Refreshes the values.</td>
</tr>
<tr>
<td><img src="image" alt="Inputs" /></td>
<td>Select/deselects all inputs</td>
</tr>
<tr>
<td><img src="image" alt="Adjustments" /></td>
<td>Select/deselects all adjustments</td>
</tr>
<tr>
<td><img src="image" alt="Drivers" /></td>
<td>Select/deselects all drivers</td>
</tr>
</tbody>
</table>

This causes 963 to only display items of the selected item types whose label matches the search string.

Access to this display can be restricted.
2.1.1.4  Diary Display

The Diary Display, shown below, provides information about the system's occupation times.

It has four tabs:

- **Group Time Planner**
  The Group Time Planner tab provides a calendar view of the occupation times for the diary group in diary or groups selected in the Navigator. It indicates whether a day follows the normal occupation times for the selected group, or an exception using colours. Information about exceptions can be displayed by clicking the exception. A dot in the top right corner of a day indicates that the day has more than one exception applied, moving the mouse over the day will display more information. Buttons enable exception set to be added, edited, or deleted, and entire time schemes to be applied.

- **Group setup and status**
  The Group setup and status tab displays a list of the timezones that are linked to the diary group(s) selected in the Navigator. The list indicates the site, Lan, controller name, timezone label, item code, value, and device type. Buttons enable timezones to be added to the group, times to be sent to the controllers, actual times to be viewed, and group settings to be edited.

- **Time Schemes**
  The Time Schemes tab displays the normal occupation times, and the time schemes that have been set up for the Diary group selected in the Navigator in a list. Buttons enable new time schemes to be created, existing one to be edited, or deleted, and time schemes to be imported from other diary groups.

- **Report**
  The Report tab provides information about the download of occupation times to the diary group selected in the Navigator. Buttons enable selection between a list of current download failure, all download failures, and a full download history.

Access to this display can be restricted to certain users.
2.1.1.5 Event Scheduler Display

The Event Scheduler Display, shown below, displays a list of all the scheduled events that 963 is going to perform in the future. It displays events that 963 has been set to perform by the engineer; it also displays scheduled events created by 963’s Diary functions. The types of events can be filtered by clicking the required filter in the Navigator. It is used to organise and display all the automated actions carried out by 963, e.g. sensor-recording actions, or diary exceptions.

Access to this display can be restricted.
2.1.1.6 Schematic Page Display

The **Schematic Page Display**, shown below, enables a schematic page to be displayed. The **Navigator** displays a tree view of all the schematic pages, clicking a page will display it in the **Data Display**.

The **Navigator** provides a way of organising pages into folders, so that they can be located quickly, or to prevent access to particular users.
2.1.1.7 User Display

The User Display, shown below, Displays a page for the user selected in the Navigator. This page enables the user to log in, log off, or to change their password. It also enables the engineer to define access rights for people who require to use 963.
2.1.1.8 Web Browser Display

The **Web Browser Display**, shown below, enables selected web sites to be accessed. By default, it has some pages set up.

The **Navigator** displays the different sites that are available. Clicking a site in the **Navigator** will cause it to be displayed in the **Data Display**. The top of the **Data Display** contains five buttons, shown below, that enable navigation around the selected web site in a similar way to other web browsers.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>Goes to the previous HTML page.</td>
</tr>
<tr>
<td>🔄</td>
<td>Goes to next HTML page.</td>
</tr>
<tr>
<td>🚪</td>
<td>Stops the current HTML page being uploaded.</td>
</tr>
<tr>
<td>🏛</td>
<td>Goes to the Home HTML page.</td>
</tr>
<tr>
<td>🔄</td>
<td>Updates the current HTML page.</td>
</tr>
</tbody>
</table>

Access to this display can be restricted.
2.1.2 Menu Bar

The Menu Bar contains 963’s menus, which provide access to the application’s various features. The following menus are available:

- Data Recording Menu
- Database Menu
- Edit Menu
- File Menu
- Help Menu
- Graphs Menu
- Mode Menu
- Navigation Menu
- SMS Menu
- Tools Menu
- User Menu
- View Menu
- Zoom Menu

The menus available at a particular time and the commands they contain will depend on the job currently being carried out by 963.

If required the Menu Bar can be hidden, or made unavailable for some users.

2.1.3 Navigator

The Navigator appears on the left of the 963 Window. It allows the information displayed in the Data Display to be specified. For example, if a schematic page is displayed, the Navigator enables the page to be selected, whereas if the User Display is selected, it enables a particular user or workgroup to be selected. The contents of the Navigator associated with each display is described below:

**Alarm Viewer**

Displays a tree view the alarm handling structure containing Alarm filters, alarm groups, alarm priorities, and retransmission destinations. It enables the alarms displayed in the Data Display to be selected. For example, clicking an alarm filter will filter the alarms in the Data Display. Icons indicate the type of object. The table below lists the different icons.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Alarm Filters Section" /></td>
<td>Alarm Filters Section</td>
</tr>
<tr>
<td><img src="image" alt="All Alarms" /></td>
<td>All Alarms</td>
</tr>
<tr>
<td><img src="image" alt="Alarm Filter" /></td>
<td>Alarm Filter</td>
</tr>
<tr>
<td><img src="image" alt="Alarm Group Section, and Default Alarm Group" /></td>
<td>Alarm Group Section, and Default Alarm Group</td>
</tr>
<tr>
<td><img src="image" alt="Alarm Group" /></td>
<td>Alarm Group</td>
</tr>
<tr>
<td><img src="image" alt="Alarm Priority, and Alarm Priority Level" /></td>
<td>Alarm Priority, and Alarm Priority Level</td>
</tr>
<tr>
<td><img src="image" alt="Retransmission Destination Section (all retransmission destinations)" /></td>
<td>Retransmission Destination Section (all retransmission destinations)</td>
</tr>
<tr>
<td><img src="image" alt="Retransmission Destination" /></td>
<td>Retransmission Destination</td>
</tr>
</tbody>
</table>
**Configuration Mode Display**
Displays a tree view of the system to which 963 is connected enabling the controller for which configuration mode is required to be selected. Clicking a controller will cause it to enter configuration mode, and the configuration prompts displayed in the **Data Display**. Icons indicate the type of object. The table below lists the different icons.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Supervisors</strong></td>
<td></td>
</tr>
<tr>
<td><img src="image1" alt="Icon" /></td>
<td>921 Supervisor</td>
</tr>
<tr>
<td><img src="image2" alt="Icon" /></td>
<td>940 Supervisor</td>
</tr>
<tr>
<td><img src="image3" alt="Icon" /></td>
<td>942 Supervisor</td>
</tr>
<tr>
<td><img src="image4" alt="Icon" /></td>
<td>943 Supervisor</td>
</tr>
<tr>
<td><img src="image5" alt="Icon" /></td>
<td>945 Supervisor</td>
</tr>
<tr>
<td><img src="image6" alt="Icon" /></td>
<td>950 Supervisor</td>
</tr>
<tr>
<td><img src="image7" alt="Icon" /></td>
<td>963 Supervisor, 962 Supervisor, S2 Supervisor, or ViewPoint</td>
</tr>
<tr>
<td><strong>Devices</strong></td>
<td></td>
</tr>
<tr>
<td><img src="image8" alt="Icon" /></td>
<td>ANC</td>
</tr>
<tr>
<td><img src="image9" alt="Icon" /></td>
<td>BACnet Device</td>
</tr>
<tr>
<td><img src="image10" alt="Icon" /></td>
<td>CNC</td>
</tr>
<tr>
<td><img src="image11" alt="Icon" /></td>
<td>FNC</td>
</tr>
<tr>
<td><img src="image12" alt="Icon" /></td>
<td>ID200</td>
</tr>
<tr>
<td><img src="image13" alt="Icon" /></td>
<td>INC</td>
</tr>
<tr>
<td><img src="image14" alt="Icon" /></td>
<td>IQ100 Controller</td>
</tr>
<tr>
<td><img src="image15" alt="Icon" /></td>
<td>IQ111 Controller</td>
</tr>
<tr>
<td><img src="image16" alt="Icon" /></td>
<td>IQ131 Controller</td>
</tr>
<tr>
<td><img src="image17" alt="Icon" /></td>
<td>IQ151 Controller</td>
</tr>
<tr>
<td><img src="image18" alt="Icon" /></td>
<td>IQ2 Controller</td>
</tr>
<tr>
<td><img src="image19" alt="Icon" /></td>
<td>IQ3 Controller</td>
</tr>
<tr>
<td><img src="image20" alt="Icon" /></td>
<td>IQ70 Controller</td>
</tr>
<tr>
<td><img src="image21" alt="Icon" /></td>
<td>IQ90 Controller</td>
</tr>
</tbody>
</table>
### Device Viewer

Displays a tree view of the system to which 963 is connected, enabling the level at which the system is displayed in the **Data Display** to be selected. For example, clicking a Lan will display all the points with labels on that Lan. Icons indicate the type of object. The table below lists the different icons.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Supervisors" /> IQL Controller</td>
<td>IQL Controller</td>
</tr>
<tr>
<td><img src="image" alt="Supervisors" /> Non IQ system device</td>
<td>Non IQ system device</td>
</tr>
<tr>
<td><img src="image" alt="Supervisors" /> PNC</td>
<td>PNC</td>
</tr>
<tr>
<td><img src="image" alt="Supervisors" /> TONIC</td>
<td>TONIC</td>
</tr>
<tr>
<td><img src="image" alt="Supervisors" /> TOPS</td>
<td>TOPS</td>
</tr>
<tr>
<td><img src="image" alt="Supervisors" /> XNC</td>
<td>XNC</td>
</tr>
<tr>
<td><img src="image" alt="Site Structure" /> BACnet Lan</td>
<td>BACnet Lan</td>
</tr>
<tr>
<td><img src="image" alt="Site Structure" /> Local site</td>
<td>Local site</td>
</tr>
<tr>
<td><img src="image" alt="Site Structure" /> Remote Site</td>
<td>Remote Site</td>
</tr>
<tr>
<td><img src="image" alt="Site Structure" /> Trend Lan</td>
<td>Trend Lan</td>
</tr>
<tr>
<td><img src="image" alt="Site Structure" /> Unknown Lan</td>
<td>Unknown Lan</td>
</tr>
<tr>
<td><img src="image" alt="General" /> Unknown Device</td>
<td>Unknown Device</td>
</tr>
</tbody>
</table>

- **Unknown Device**

- **921 Supervisor**
- **940 Supervisor**
- **942 Supervisor**
- **943 Supervisor**
- **945 Supervisor**
- **950 Supervisor**
- **963 Supervisor, 962 Supervisor, S2 Supervisor, or ViewPoint**
- **NDP**
- **IQView**
### Icon Description

#### Supervisors

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANC</td>
<td>ANC</td>
</tr>
<tr>
<td>CNC</td>
<td>BACnet Device</td>
</tr>
<tr>
<td>FNC</td>
<td>CNC</td>
</tr>
<tr>
<td>ID200</td>
<td>FNC</td>
</tr>
<tr>
<td>INC</td>
<td>ID200</td>
</tr>
<tr>
<td>IQ100Controller</td>
<td>INC</td>
</tr>
<tr>
<td>IQ111Controller</td>
<td>IQ100Controller</td>
</tr>
<tr>
<td>IQ131Controller</td>
<td>IQ111Controller</td>
</tr>
<tr>
<td>IQ151Controller</td>
<td>IQ131Controller</td>
</tr>
<tr>
<td>IQ2Controller</td>
<td>IQ151Controller</td>
</tr>
<tr>
<td>IQ3Controller</td>
<td>IQ2Controller</td>
</tr>
<tr>
<td>IQ70Controller</td>
<td>IQ3Controller</td>
</tr>
<tr>
<td>IQ90Controller</td>
<td>IQ70Controller</td>
</tr>
<tr>
<td>IQLController</td>
<td>IQ90Controller</td>
</tr>
<tr>
<td>Non IQ system device</td>
<td>IQLController</td>
</tr>
<tr>
<td>PNC</td>
<td>Non IQ system device</td>
</tr>
<tr>
<td>TONIC</td>
<td>PNC</td>
</tr>
<tr>
<td>TOPS</td>
<td>TONIC</td>
</tr>
<tr>
<td>XNC</td>
<td>TOPS</td>
</tr>
</tbody>
</table>

#### Site Structure

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BACnet Lan</td>
<td>Site Structure</td>
</tr>
<tr>
<td>Local site</td>
<td>BACnet Lan</td>
</tr>
<tr>
<td>Remote Site</td>
<td>Local site</td>
</tr>
<tr>
<td>Trend Lan</td>
<td>Remote Site</td>
</tr>
<tr>
<td>Unknown Lan</td>
<td>Trend Lan</td>
</tr>
</tbody>
</table>
### Diary Display
Displays a tree view of all the diary groups and folders. Clicking a group will display the associated times in the Data Display. Icons indicate the type of object. The table below lists the different icons.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="Icon" /></td>
<td>Diary Groups Section (all diary groups)</td>
</tr>
<tr>
<td><img src="image2" alt="Icon" /></td>
<td>Diary Group</td>
</tr>
<tr>
<td><img src="image3" alt="Icon" /></td>
<td>New Diary Group</td>
</tr>
</tbody>
</table>

### Event Scheduler Display
Displays a list of different types of events. Clicking one of these will display a list of events of that type in the Data Display.

### Schematic Page Display
Displays the available schematic pages. It allows the pages to be organised into folders to make locating the required page easier. Clicking a folder will expand it to display any sub folders, or pages. Click a page will cause it to be displayed in the Data Display. Folders can be set up with user access levels to prevent particular users accessing them. Pages not in a folder are always visible to all users. Each folder can contain both folders and pages. Icons indicate the type of object. The table below lists the different icons.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image4" alt="Icon" /></td>
<td>All Schematic Page</td>
</tr>
<tr>
<td><img src="image5" alt="Icon" /></td>
<td>Folder of schematic pages</td>
</tr>
<tr>
<td><img src="image6" alt="Icon" /></td>
<td>Schematic Page</td>
</tr>
</tbody>
</table>

### User Display
Displays a tree view of all the workgroups and users. Clicking a workgroup will expand it revealing the users in that workgroup. Clicking a particular user will display that user’s login page in the Data Display. Icons indicate the type of object. The table below lists the different icons.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image7" alt="Icon" /></td>
<td>Workgroup</td>
</tr>
<tr>
<td><img src="image8" alt="Icon" /></td>
<td>User</td>
</tr>
</tbody>
</table>

### Web Browser Display
Displays a list of web sites that can be selected. Clicking one will cause it to be displayed in the Data Display.
2.1.4 Network Comms Status Lights

The **Network Comms Status Lights** appear at the bottom of the **963 Window**. They provide information about the status of communications in and out of the node connecting 963 to the IQ network, and the status of any remote connection devices on the system.

- **TX and RX indicators**: These flash green when 963 is receiving, or transmitting information. If they appear grey, 963 has been unable to locate the CNC.
- **Remote connection indicator**: If grey, all of the devices are available for use, if red, at least one of them is attempting to make a connection, and if green, at least one is connected. Clicking this icon displays the **Remote Connection Window**.

If 963 has been licenced with SMS Direct an additional icon is displayed. This icon indicates the status of the modem, if a 963 is busy talking to the phone the icon will flash between green and red. The icon will be grey if there is a problem communicating with the phone. If the PIN for the modem is incorrect, an exclamation mark will appear next to the icon. Clicking this icon displays the **SMS Activity Window**.

2.1.5 Selection Buttons

The **Selection Buttons**, shown below, appear at the bottom of the **Navigator** of the **963 Window**. They provide access to the 963’s different displays. Access to these buttons can be protected, preventing unauthorised users accessing the displays.

<table>
<thead>
<tr>
<th>Button</th>
<th>Information Displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alarms</td>
<td>Alarm Viewer.</td>
</tr>
<tr>
<td>Config</td>
<td>Configuration Mode Display.</td>
</tr>
<tr>
<td>Devices</td>
<td>Device Viewer.</td>
</tr>
<tr>
<td>Web Browser</td>
<td>Web Browser Display.</td>
</tr>
<tr>
<td>Scheduler</td>
<td>Event Scheduler Display.</td>
</tr>
<tr>
<td>Diary</td>
<td>Diary Display.</td>
</tr>
<tr>
<td>Schematics</td>
<td>Schematic Page Display.</td>
</tr>
<tr>
<td>Users</td>
<td>User Display</td>
</tr>
</tbody>
</table>

If a button is greyed out, this indicates that the user currently logged on does not have access to that display. It is also possible to minimise buttons that are not used very often doing this displays the button as shown below. Clicking these minimised buttons will also display the corresponding display. Buttons can also be hidden from the toolbar as required.

2.1.6 Status Bar

The **Status Bar**, shown below, is located at the bottom of the **963 Window**. It provides information about the version of 963, the name of the user that is currently logged on, and the number of alarms that are left to acknowledge, as well as the current date and time.

```
System Administrator  Zoom: 100%  963 v2.20[SERVER]  07 September 2007 16:49:17 (Left=13)  = 13  = 11
```

The name of the user currently logged on is displayed in the left of **Status Bar**, the version of 963 in the next column, with the number of occurred alarms waiting to be actioned (red bell), number of cleared alarms waiting to be actioned (green bell) and the current date and item in the last one.
2.2 The Information Centre Window

The **Information Centre Window**, shown below, is designed to inform the user what 963 is doing (i.e. starting up, downloading times etc), and to provide access to more detailed information such as communications. It is automatically displayed when 963 is performing a task, but can also be displayed when required by pressing F1.

![Information Centre Window](image)

The information about what 963 is currently doing is displayed in the **What is happening now?** box. The current command can be cancelled by clicking **Cancel Command**.

The buttons at the bottom of the window provide access to licence details, communications information, autodialler status, system information, script information, and the on-line help.

*Note that the availability of these buttons is dependent on the user’s level of authority, therefore some of the buttons may be greyed out.*
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3 USING 963

This section describes how to use 963. It describes all the necessary tasks required to operate 963, and make adjustments to the system once it has been correctly engineered. A summary of using 963 is provided in the 'Basic Use' section of this manual. For a more detailed description of the different tasks see the following sections:

<table>
<thead>
<tr>
<th>Action Alarms</th>
<th>Adjust Occupation Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjust Values</td>
<td>Administer the System</td>
</tr>
<tr>
<td>Control Scripts</td>
<td>Display a Schematic Page</td>
</tr>
<tr>
<td>Display Graphs</td>
<td>Display IQ3 Web Pages</td>
</tr>
<tr>
<td>Display Scheduled Events</td>
<td>Display the Information Centre</td>
</tr>
<tr>
<td>Display the IQ System</td>
<td>Display HTML Pages</td>
</tr>
<tr>
<td>Enter Configuration Mode on Pre IQ3 Controllers</td>
<td>Insert a List into an HTML File</td>
</tr>
<tr>
<td>Layout the Window</td>
<td>Manage Your User Account</td>
</tr>
<tr>
<td>Playback Recorded Data</td>
<td>Record Data</td>
</tr>
<tr>
<td>Save a List to HTML</td>
<td>Send an SMS Message</td>
</tr>
<tr>
<td>Setup Exception Templates</td>
<td>View Alarms</td>
</tr>
<tr>
<td>View Communications Information</td>
<td>View Occupation Times</td>
</tr>
<tr>
<td>View the IQ System</td>
<td>Display HTML Pages</td>
</tr>
<tr>
<td>Display HTML Pages</td>
<td></td>
</tr>
<tr>
<td>Enter Configuration Mode on Pre IQ3 Controllers</td>
<td>Insert a List into an HTML File</td>
</tr>
<tr>
<td>Layout the Window</td>
<td>Manage Your User Account</td>
</tr>
<tr>
<td>Playback Recorded Data</td>
<td>Record Data</td>
</tr>
<tr>
<td>Save a List to HTML</td>
<td>Send an SMS Message</td>
</tr>
<tr>
<td>Setup Exception Templates</td>
<td>View Alarms</td>
</tr>
</tbody>
</table>

### 3.1 Basic Use

This section of the manual describes the most basic use of the 963. It assumes that the user only has access to the pages that have been engineered. Most of the information presented to the user is displayed on schematic pages that have been set up. Clicking certain parts of the page will cause something to happen; exactly what happens is dependent on how the 963 is set up. When the mouse pointer is moved over a part of the screen that will do something it changes to a hand (_HAND). These areas of the screen will generally be obvious because of text that appears in, or next to them.

**To use 963:**

1. On the **Start** menu point to All Programs point to Trend Control Systems and click 963 to run 963.
2. On the **User** menu click Log in and enter your user name and password to log in as described in the ‘Log In’ section of this manual. It is necessary to log in so that 963 knows what information and facilities you are able to access. *Remember the username is case sensitive.*
3. In the **Navigator** click the appropriate **Selection Button** to select the required display. These are listed in the table below. For details about each of the displays see the ‘The 963 Window’ section of this manual.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Alarms" /></td>
<td>Displays the Alarm Viewer.</td>
<td><img src="image" alt="Config" /></td>
<td>Displays the Configuration Mode Display.</td>
</tr>
<tr>
<td><img src="image" alt="Devices" /></td>
<td>Displays the Device Viewer.</td>
<td><img src="image" alt="Web Browser" /></td>
<td>Displays the Web Browser Display.</td>
</tr>
<tr>
<td><img src="image" alt="Scheduler" /></td>
<td>Displays the Event Scheduler Display.</td>
<td><img src="image" alt="Diary" /></td>
<td>Displays the Diary Display.</td>
</tr>
<tr>
<td><img src="image" alt="Schematics" /></td>
<td>Displays the Schematic Page Display.</td>
<td><img src="image" alt="Users" /></td>
<td>Displays the User Display.</td>
</tr>
</tbody>
</table>

4. Once you have selected the required display you will be able to view the information such as schematic pages, the Device Viewer, and alarms. Clicking the different objects will enable you to perform different tasks the display should make it clear what can be done. The table below lists the common tasks you should see the corresponding section of this manual for more details.

<table>
<thead>
<tr>
<th>Action Alarms</th>
<th>Adjust Occupation Times</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjust Values</td>
<td>Administer the System</td>
</tr>
<tr>
<td>Control Scripts</td>
<td>Display a Schematic Page</td>
</tr>
<tr>
<td>Display Graphs</td>
<td>Display IQ3 Web Pages</td>
</tr>
<tr>
<td>Display Scheduled Events</td>
<td>Display the Information Centre</td>
</tr>
<tr>
<td>Display the IQ System</td>
<td>Display HTML Pages</td>
</tr>
<tr>
<td>Enter Configuration Mode on Pre IQ3 Controllers</td>
<td>Insert a List into an HTML File</td>
</tr>
<tr>
<td>Layout the Window</td>
<td>Manage Your User Account</td>
</tr>
<tr>
<td>Playback Recorded Data</td>
<td>Record Data</td>
</tr>
</tbody>
</table>
5. Log off as described in the ‘Log Off’ section of this manual when the use of 963 is finished.

3.1.1 Run 963

963 can run in the same way as any Windows application, from the Start menu, from a shortcut, or from the Taskbar. 963’s installation process adds an option to run it from the Start menu.

To run 963:
1. On the Start menu point to All Programs and then point to Trend Control Systems and click 963.

If 963 has been licenced, it will run up displaying the 963 Window. An icon is displayed at the bottom left of the screen. If 963 is not licenced a message indicating how many days you have left to evaluate the product will be displayed.

Note that 963 is to access information on a BACnet network (963 BACnet), and TOPS has been installed on a different PC to 963 TOPS must be running. See the 'Start TOPS Manually' section of the 963 Engineering Manual (TE200637).

3.1.2 Log In

Before 963 can be used, it is necessary to log in so that 963 knows what information and facilities you are able to access.

To log in:
1. On the User menu click Log in. The Please type in you username dialogue box displayed.

2. In the box enter your username. Remember the username is case sensitive.
3. Click OK. The Password dialogue box is displayed.

4. In the Password box enter your password.

   Note that passwords are case sensitive.

5. Click OK.

Note that a button may have been provided on the page that enables you to log in.

3.1.3 Log Off

Once use of 963 is finished, it is advisable to log off to prevent unauthorised changes being made.

To log off:
1. On the User menu click Log off.

Note that if left unattended for a period of time 963 may automatically log the current user off if it has been configured in this way.

It is recommended that after logging off, the computer be locked to prevent other people accessing the PC.

Note that a button may have been provided on the page that enables you to log off.
3.1.4 Close 963

963 should be left running all the time to ensure alarms are processed correctly, and other tasks carried out. However it can be closed.

To close 963:
1. Log in as described in the ‘Log In’ section of this manual.
2. On the File menu click **Exit**, or click \( \times \). A dialogue box asking if you are sure you want to close 963 is displayed.
3. Click Yes.

*Note that not all users will be able to close 963.*

3.2 Display a Schematic Page

This section of the manual describes how to access and use the 963’s schematic pages. Most of the information presented to the user is displayed on schematic pages that have been set up. Clicking certain parts of the page will cause something to happen; exactly what happens is dependent on how the 963 is set up. When the mouse pointer is moved over a part of the screen that will do something it changes to a hand (\( \mathbb{H} \)). These areas of the screen will generally be obvious because of text that appears in, or next to them.

To display a schematic page:
1. Run 963 as described in the ‘Run 963’ section of this manual.
2. On the User menu click **Log in** to log in and enter your user name and password as described in the ‘Log In’ section of this manual. A schematic page may now be displayed if not got to (3) if one is displayed go to (4).
3. Click \( \square \) or on the Mode menu click **Schematics** to select the **Schematic Page Display**.
4. Click the button or picture that displays the required page or click on the page in the **Navigator**. To display the page in a new window hold down the CTRL key and click the button or picture. To move from page to page click the button or picture that provides access to the required page.

As you move from page to page 963 keeps a record of the pages and enables you to move backwards and forwards through the pages. To do this on the **Navigation** menu click **Move backwards** or **Move forwards**, or right-click the page and click **Forward** or **Backward**.

*Note that the Navigator can be refreshed by right clicking it, and clicking Refresh View from the displayed menu.*

5. Once the required page is displayed you will be able to view the information, clicking the different objects will enable you to perform different tasks the page display should make is clear what can be done.

Values can be adjusted by clicking the button or picture that enables the value to be changed and specifying the new value. Values that have been overridden ON/OFF will have a flashing border unless configured otherwise. Compact graphs can be displayed by clicking the value that is to be graphed. Precision graphs can be displayed by right-clicking the value and clicking **Collect full precision log graph(s)**. The page can be made to fit completely in the display area by right-clicking the page and on the displayed menu clicking **Fit to page**, or on the **Zoom** menu click **Fit to page**. If it has been set up a list of points associated with a value can be displayed by holding down the CTRL key and clicking the value. Configuration parameters of the configuration modules within IQ controllers can be viewed by right clicking on a value and clicking **Edit Item** from the displayed menu. Clicking **Home** from the User menu will display the schematic page displayed when you first logged in.

6. Log off when the use of 963 is finished.
### 3.2.1 Zoom in and Out of a Schematic Page

It is possible to zoom in and out on any schematic page so that the data can be more easily seen.

**To zoom in:**
1. On the **Zoom** menu click **Zoom in**, or right-click anywhere on the page and on the displayed menu point to **Zoom** and click **Zoom in**. The pointer will change to a.
2. Hold down the left mouse button, and drag the mouse over the required area, or click the mouse button to zoom in one level.
3. Release the mouse button.

**To zoom out:**
1. On the **Zoom** menu click **Zoom out**, or right-click anywhere on the page and on the displayed menu point to **Zoom** and click **Zoom out**. The pointer will change to a.
2. Click the mouse button to zoom out one level.
3. Release the mouse button.

To zoom out again, repeat the process.

**To return to the original zoom level:**
1. On the **Zoom** menu click **Zoom to original**, or right-click anywhere on the page and on the displayed menu point to **Zoom** and click **Zoom to original**.

**To zoom with a mouse wheel:**
1. Hold down the CTRL key and use the mouse wheel to zoom in and out.

### 3.2.2 Print a Schematic Page

963 can print out schematic pages to any Windows printer accessible to the PC running 963.

**To print a page:**
1. View the page as described in the ‘Display a Schematic Page’ section of this manual.
2. On the **File** menu point to **Print** and click **Print**, or right-click anywhere on the page and on the displayed menu point to **Print** and click **Print**. The **Print** dialogue box is displayed.
3. In the **Name** box click the required printer.

*Note that changing the printer from here will change the page printer used by 963 to print out pages, graphs, and alarm priority statistics.*

4. If necessary click **Properties** to set up the printer as required.
5. In the **Number of copies** box enter the number of copies required.
6. If a print template is to be used select the **Use Template** check box, and click the required template from the list.

*Note that if the print template changed the 963 will remember it, and that will be the template selected next time.*

7. Click **OK**.

You can preview what will be printed by pointing to **Print** on the **File** menu and clicking **Print Preview**, or right-clicking the page, and on the displayed menu pointing to **Print** and clicking **Print Preview**.
3.3 Adjust Values

3.3.1 Adjust Knob Values

3.3.1.1 Adjust a Knob in a Trend Device

The value of knobs in Trend devices can be adjusted from a schematic page or from the Device Viewer.

**To adjust a knob in a Trend device:**

1. Display the page containing the knob that is to be adjusted and click the button that enables it to be changed.

Or

View the knob that is to be adjusted in the Device Viewer, right-click the knob, and click Adjust Point.

2. At this point you may be asked if you are sure you want to make the adjustment click Yes.

A dialogue box is displayed.

3. Enter the new value by typing it in, clicking the numbers, or clicking << or >> to decrement/increment the value.

4. Click Enter.

3.3.1.2 Adjust a Knob (Analogue Value) in a BACnet Device

Analogue values in a BACnet devices are represented in 963 as knobs, these can be adjusted from a schematic page or from the Device Viewer.

**To adjust knob (analogue value) in a BACnet device:**

1. Display the page containing the knob representing the analogue value that is to be adjusted and click the button that enables the value to be changed.

Or

View the knob representing the analogue value that is to be adjusted in the Device Viewer, right-click the knob, and click Adjust Point.

2. At this point you may be asked if you are sure you want to make the adjustment click Yes.

A dialogue box is displayed.

3. Enter the new value by typing it in, clicking the numbers, or clicking << or >> to decrement/increment the value.

4. Click Enter.

**Important:** When 963 adjusts a value in a BACnet device it writes the value into the value's priority array. The value will remain in the array, and be used when it is the highest. Therefore making the adjustment does not mean that it will be the value that is used. If required the 963’s adjustment can be removed from the array by relinquishing control.
3.3.2 Adjust Switches

3.3.2.1 Adjust a Switch in a Trend Device

Switches in a Trend device e.g. controller can be adjusted from a schematic page or from the Device Viewer.

To adjust a switch in a Trend device:
1. Display the page containing the switch that is to be adjusted and click the button that enables it to be changed.

Or
View the switch that is to be adjusted in the Device Viewer, right-click the switch, and click Adjust Point.
The Adjust Point dialogue box is displayed.

Note that the display of the dialogue box can be disabled meaning that the adjustment occurs immediately.

2. Click Yes.

3.3.2.2 Adjust a Switch (Digital Value) in a BACnet Device

Digital values in BACnet devices are represented in 963 as switches, these can be adjusted from a schematic page or from the Device Viewer.

To adjust a switch (digital value) in a BACnet device:
1. Display the page containing the switch representing the digital value that is to be adjusted, and click the button that enables it to be changed.

Or
View the switch representing the digital value that is to be adjusted, in the Device Viewer, right-click the switch, and click Adjust Point.
The Switch Adjuster dialogue box is displayed.

2. Select the Adjust switch status option.
3. Click OK. The Adjust Point dialogue box is displayed.

Note that the display of the dialogue box can be disabled meaning that the adjustment occurs immediately.

4. Click Yes.

Important: When 963 adjusts a value in a BACnet device it writes the value into the value's priority array. The value will remain in the array, and be used when it is the highest. Therefore making the adjustment does not mean that it will be the value that is used. If required the 963's adjustment can be removed from the array by relinquishing control.
3.3.3 Adjust a Module Parameter

It is possible to adjust certain parameters of the configuration modules within IQ controllers directly from a schematic page or the Device Viewer.

To adjust a module parameter:
1. Display the page containing value from the controllers whose configuration parameters are to be adjusted.

Or

View the value from the controllers whose configuration parameters are to be adjusted in the Device Viewer, right-click the value, and click Adjust Point.

2. Right-click the value, and click Edit Item. The View as Points dialogue box is displayed.

3. Right-click the parameter that is to be changed, and click Adjust Point from the menu that is displayed. The Enter new value for dialogue box is displayed.

4. In the box enter the new value.

5. Click OK, to return to the View as Points dialogue box and then to close the View as Points dialogue box.
3.3.4 Relinquish Control of a BACnet Value

When 963 adjusts a value in a BACnet device it writes the value into the value’s priority array. The value will remain in the array, and be used when it is the highest. If required the 963’s adjustment can be removed from the array by relinquishing control.

Relinquish control of an analogue value:

1. Display the page containing the value for which you want to relinquish control, and click the button or picture that enables the value to be changed.

Or

View the value for which you want to relinquish control in the Device Viewer, right-click the value, and click Adjust Point.

2. At this point you may be asked if you are sure you want to make the adjustment click Yes.

A dialogue box is displayed.

3. Select the Relinquish control check box.

4. Click Enter.

Relinquish control of a digital value:

1. Display the page containing the value or which you want to relinquish control, and click the button or picture that enables the value to be changed.

Or

View the value for which you want to relinquish control in the Device Viewer, right-click the value, and click Adjust Point.

The Switch Adjuster dialogue box is displayed.

2. Select the Relinquish control option.

3. Click OK. The Adjust Point dialogue box is displayed.
3.4 Alarms

3.4.1 View Alarms

963 indicates that an alarm has been received from the IQ system by carrying out any actions that have been engineered.

Alarms are shown as they arrive on the Incoming Alarms tab of the Alarm Viewer. This list stores the last 100 alarms. After alarms have been processed, they will appear in the Alarm History tab. In both of the lists icons indicate whether or not an alarm has been actioned by a user. Colours are used to indicate whether the alarm is a set alarm or a cleared alarm. A red bell indicates a set alarm, and a green bell indicates a cleared alarm. If the alarm has been actioned by the user the bell will appear with a tick over it. The table below shows the different icons.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Set alarm that has not been actioned." /></td>
<td>Set alarm that has not been actioned.</td>
</tr>
<tr>
<td><img src="image" alt="Set alarm that has been actioned." /></td>
<td>Set alarm that has been actioned.</td>
</tr>
<tr>
<td><img src="image" alt="Cleared alarm that has not been actioned." /></td>
<td>Cleared alarm that has not been actioned.</td>
</tr>
<tr>
<td><img src="image" alt="Cleared alarm that has been actioned." /></td>
<td>Cleared alarm that has been actioned.</td>
</tr>
</tbody>
</table>

The Alarm History tab is colour coded to indicate whether or not the alarm is current. Red indicates that the alarm is current.

There are a number of different ways in which alarms can be viewed:

- View Alarms for a Particular Point
- View Incoming Alarms
- View Alarm History
- View Alarms for an Alarm Panel
- View Alarm Priority Statistics
- View an Audit Trail
- View the Current Value

3.4.1.1 View Alarms for a Particular Point

It is possible to view all the alarms for a particular point that is displayed on a schematic page, or from any point displayed in the Device Viewer.

To view alarms for a particular point:

1. Display the page containing the point, or display the required point in the Device Viewer.
2. Right-click the point for which alarms are to be viewed, and on the displayed menu List of alarms. The List of alarms dialogue box is displayed listing all the alarms that have occurred for that point. If there are more than 500 alarms for the point <500> and 500> buttons will be enabled to provide access to the others.

3. To close the window click OK.

The alarms can be actioned by clicking the alarm to select it, and then clicking Action. All alarms can be actioned by clicking Action all un-actioned alarms in the list. The list in the dialogue box can be printed by right-clicking anywhere in the list, and on the displayed menu clicking Print this page. It can also be saved to an HTML file, or inserted in an existing HTML file in a similar way.
3.4.1.2 View Incoming Alarms

Alarms are shown as they arrive on the **Incoming Alarms** tab of the **Alarm Viewer**. This list stores the last 100 alarms.

**To view incoming alarms:**
1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the **Mode** menu click **Alarms** to select the **Alarm Viewer**.
3. Click the **Incoming Alarms** tab.

More information about a particular alarm can be displayed by clicking the alarm. This will display a balloon containing information about the alarm, moving the mouse will cause the balloon to disappear. If the text does not fit in the column, the column can be resized by dragging the edge to the correct size. Clicking **Clear List** will clear the list.

*Note that the Device Viewer provides an indication of any supported value on the system in an alarm condition. See the ‘Display the IQ System’ section of this manual.*

3.4.1.3 View Alarm History

Once alarms have been processed they will appear on the **Alarm History** tab of the **Alarm Viewer**. This list stores all the alarms in the database that have been processed whether or not they have been actioned by the user. The alarms can be viewed in chronological order or a summary view that provides a count for each alarm type and module.

**To view alarm history:**
1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the **Mode** menu click **Alarms** to select the **Alarm Viewer**.
3. Click the **Alarm History** tab.
4. Click **Chronological View** option, or the **Summary View** as required.
5. In the **Show** box click the required option to select what alarms are to be viewed.

<table>
<thead>
<tr>
<th>Alarm</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>All alarms that have been processed</td>
</tr>
<tr>
<td>Current Alarms</td>
<td>Any alarm not cleared.</td>
</tr>
<tr>
<td>Alarms Requiring Actioning</td>
<td>Alarms which the user has not yet actioned.</td>
</tr>
<tr>
<td>Historic Actioned Alarms</td>
<td>Cleared alarms that have been actioned.</td>
</tr>
</tbody>
</table>

6. If the **Chronological View** has been selected, select the required date range from the **date range** box. To specify a specific date range select **Custom**, click **Choose** to display another dialogue box and specify the start date for the date range. Now click **Next**, to specify the last date in the range and click **Finish**.
7. Select the alarm filter for which alarms are to be viewed from the **Navigator**.

*Note that the Navigator can be refreshed by right clicking it, and clicking **Refresh view** from the displayed menu.*

8. If required use the quick filter to locate the required alarm, select the **Search this field Enable** check box, select the required field in the **Search this field** box, enter the required search text in the **for this text** box, and click **GO**. Click **Reset** to reset the search.

More information about a particular alarm can be displayed by clicking the alarm. This will display a balloon containing information about the alarm, moving the mouse will cause the balloon to disappear. To view all the occurrences of a particular alarm double-click the alarm to display a dialogue box similar to the one for acknowledging alarms from an alarm panel, which the alarms to be acknowledged etc. If the text does not fit in the column, the column can be resized by dragging the edge to the correct size. When a summary view has been selected the alarms can be sorted by any of the columns in the display by clicking that column. The list can be refreshed by clicking **New Alarms – Click To Refresh**.

*Note that the Device Viewer provides an indication of any supported value on the system in an alarm condition. See the ‘Display the IQ System’ section of this manual.*
3.4.1.4 View Alarms for an Alarm Panel

It is possible to view all the alarms that have activated a particular alarm panel.

To view alarms for a particular alarm panel:

1. Click . A dialogue box similar to the one shown below is displayed listing all the alarms that have activated the alarm panel.

2. To close the window click OK.

   The list in the dialogue box can be printed by right-clicking anywhere in the list, and clicking Print. It can also be saved to an HTML file, or inserted in an existing HTML file in a similar way.

3.4.1.5 View Alarm Priority Statistics

It is possible to view all the alarms grouped by priority in the form of a bar, or pie chart.

To view alarm priority statistics:

1. Log in as described in the ‘Log In’ section of this manual.

2. Click or on the Mode menu click Alarms to select the Alarm Viewer.

3. Click the Alarm Priority Statistics tab.

4. Select the required type of chart form the list.

5. Click Refresh.

6. Format the display as required. Any item on the chart can be moved by clicking it to select it, and then dragging it to the required location, or resized by clicking one of the handles once it has been selected, and dragging the handle to resize the object as required. If a 3D Bar chart is selected the viewing angle can be adjusted by holding down the CTRL key and moving the mouse to adjust the angle. It is possible to print the chart of the alarm priority statistics.

3.4.1.6 View the Current Value

It is possible to view the current value of a value for which an alarm has been received.

To view the current value:

1. Display the Alarm History, or view the Incoming Alarms list as described in the appropriate section of this manual.

2. Right-click the alarm for which the current value is required and choose View live status of item from the menu that is displayed. A dialogue box is displayed containing the value will be displayed. To print the list right-click anywhere in the list and click Print.
3. To close the window click OK.

Note that this is only possible on alarms from module parameters.

3.4.1.7 Display Alarm Panels

If an alarm panel has become hidden it is possible to display all the active alarm panels,

To display all active alarm panels:
1. On the View menu click Show all alarm panels.

3.4.2 Action Alarms

Alarms that have been sent to 963 must be actioned by a user to indicate that the alarm has been seen. When actioning alarms you are required to enter a description of the action taken in response to the alarm. Alarms can either be actioned from the Alarm Viewer, or from an alarm panel.

3.4.2.1 Action Alarms from an Alarm Panel

Alarms can be actioned from an alarm panel.

To action alarms:
1. Click in the alarm panel. A dialogue box is displayed.

2. Click the alarm(s) that are to be actioned. To select more than one alarm hold down the CTRL key and click the required alarms.

3. Click Action. The User Text dialogue box is displayed. All unactioned alarms in the panel can be actioned by clicking Action all un-actioned alarms in the list.
4. In the box enter some text describing the action to assist future faultfinding (e.g. the action taken because of the alarm).
5. Click **OK**.

### 3.4.2.2 Action Alarms from the Alarm Viewer

Alarms can be actioned from the **Alarm Viewer**.

**To action alarms:**
1. View the alarm(s) that are to be actioned as described in the ‘View Alarms’ section of this manual.
2. Click the alarm(s) that are to be actioned. To select more than one alarm hold down the CTRL key and click the required alarms.
3. Right-click any of the selected alarms, and click **Action Selected Alarms**. The **User Text** dialogue box is displayed.
4. In the box enter some text describing the action to assist future faultfinding (e.g. the action taken because of the alarm).
5. Click **OK**.

### 3.4.3 Hide Alarm Panels

If an alarm has caused an alarm panel to be displayed it is possible to hide the alarm panel for 2 minutes if it is not currently convenient to deal with the alarm e.g. you are currently working on something else that is more important.

**To hide the current alarm panel:**
1. Click on the alarm panel that is to be hidden.

**To hide all alarm panels:**
1. Click on any alarm panel.

### 3.4.4 Mute an Alarm Panel

If an alarm has caused an alarm panel that is set to beep to be displayed it is possible to mute the beep.

**To mute the beep:**
1. Click on the alarm panel that is to be muted. Clicking the button again will cause the beep to be restarted.
3.4.5 Reset the Count of SMS Alarms

963 SMS Direct will generate an alarm when it has sent a specified number of SMS messages. When this occurs the count of messages sent should be reset.

To reset the count of SMS alarms sent:
1. Run 963 and log on as someone with authority to configure SMS settings.
2. On the SMS menu click Properties. The SMS Management dialogue box is displayed.
3. Click Reset Count.
4. Click OK.

3.4.6 Run a Manual Alarm Action

Manual alarm actions enable a specific action to be run by the user when an alarm occurs. This gives the operator control over the display and prevents the situation where 963 is too busy jumping to pages for the user to interact with the rest of the system.

To run a manual alarm action:
1. Click in required alarm panel when it is displayed.

3.4.7 Print

3.4.7.1 Print Alarm Priority Statistics

It is possible to print the chart of the alarm priority statistics.

To print the alarm priority statistics:
1. View the Alarm Priority Statistics as described in the ‘View Alarm Priority Statistics’ section of this manual.
2. Click Print. The Print dialogue box is displayed.
3. Select the required printer from the list.

Note that changing the printer from here will change the page printer used by 963 to print out pages, graphs, and alarm priority statistics.
4. Set up the printer as required.
5. In the Number of copies box enter the number of copies required.
6. If a print template is to be used select the Use Template check box, and click the required template in the list.
   
   Note that if the print template changed the 963 will remember it, and that will be the template selected next time.

7. Click OK.

Clicking Print Preview will preview what will be printed.

3.4.7.2 Print a List of Alarms

It is possible to print a list of the alarms displayed in the Alarm History.

To print the list of alarms:
1. View the Alarm History as described in the ‘View Alarm History’ section of this manual.
2. Right-click the list, and click Print. The Print dialogue box is displayed.

![Print Dialogue Box]

3. In the Select Printer box click the required printer.
4. Set up the printer as required.
5. In the Number of copies box enter the number of copies required.
6. Click Print.

Right-clicking the Data Display, and clicking Print Preview will preview what will be printed.
3.5 Display Graphs

3.5.1 Display a Compact Graph

Compact graphs allow for rapid transmission of data and for very large numbers, but have an error of 1%.

To display a compact graph:

1. Display the schematic page containing the value for which logged data is to be graphed as described in the ‘Display a Schematic Page’ section of this manual, and click the value that is to be graphed.

Or

View the values that are to be graphed in the Device Viewer as described in the ‘Display the IQ System’ section of this manual, click the value(s) that are to be graphed. To select more than one, hold down the CTRL key, and click the required values, or drag the mouse over the required values, and right-click one of the values and click **Graph Point(s)**.

*Note that it is not possible to graph values from BACnet devices.*

The graph is displayed. Clicking **OK** will close the graph. To view the time and the value click a point on the graph. To display a vertical bar that can be dragged along the graph displaying the values click **Show Values** on the **Graph** menu. If the sensor is being logged in the controller at more than one interval it is possible to specify which log is used. You can zoom in and out of the graph to make it easier to see the data, a grid can be displayed, and the scaling of the Y-axis can be fixed to allow graph traces to be compared. The Y-axis can be swapped, this means that values with similar units or range can be set to use the same Y-axis. If graph definitions have been set up they can be loaded when needed, or the existing graph definition can be saved as a graph definition. A graph can be printed, or the data for a particular trace displayed as a list of points. Recorded graphs can be played back or graph recording can be specified. The graph can be recorded to the 963’s database for playback later, or can be recorded to a text file for use in other applications.

For more accurate values it is possible to display a full precision log by clicking **Use Precision log collection** on the **Precision logs** menu. *Note that it is not possible to return to a compact graph.*
3.5.2 Display a Precision Graph

Precision graphs allow for great accuracy but a reduced range of values and the transfer rate is much slower. Precision graphs should be used for meter readings as there is no loss of raw data.

To display a precision graph:

1. Display the schematic page containing the value for which logged data is to be graphed as described in the ‘Display a Schematic Page’ section of this manual, right-click the value that is to be graphed and click Collect full precision log graph(s).

Or

View the values that are to be graphed in the Device Viewer as described in the ‘Display the IQ System’ section of this manual, click the value(s) that are to be graphed. To select more than one, hold down the CTRL key, and click the required values, or drag the mouse over the required values, right-click one of the values and click Collect full precision log graph(s).

Note that it is not possible to graph values from BACnet devices.

The graph is displayed. Clicking OK will close the graph. To view the time and the value click a point on the graph. To display a vertical bar that can be dragged along the graph displaying the values click Show Values on the Graph menu. You can zoom in and out of the graph to make it easier to see the data, a grid can be displayed, and the scaling of the Y-axis can be fixed to allow graph traces to be compared. The Y-axis can be swapped, this means that values with similar units or range can be set to use the same Y-axis. If graph definitions have been set up they can be loaded when needed, or the existing graph definition can be saved as a graph definition. A graph can be printed, or the points of a particular trace displayed as a list of points. Recorded graphs can be played back or graph recording can be specified. The graph can be recorded to the 963’s database for playback later, or can be recorded to a text file for use in other applications.
3.5.3 Display a Chart

A chart of values from a controller can be displayed from either a schematic page, or an existing graph.

To display a chart:
1. Display either a compact graph, or a precision graph as described in the appropriate section of this manual.
2. On the Graph menu click Chart points. The 963 dialogue box is displayed.

3. Click Yes if the existing data is to be cleared before the charted data is displayed, click No if charted data is to be added to the existing data. The selected value(s) will now be charted at a refresh rate of 15s. To change the refresh rate click Refresh rate and enter the required refresh rate in seconds (range 1 to 600) in the box.

Note that it is not possible to graph values from BACnet devices.

Clicking OK will close the graph. To view the time and the value click a point on the graph. To display a vertical bar that can be dragged along the graph displaying the values click Show Values on the Graph menu. You can zoom in and out of the graph to make it easier to see the data, a grid can be displayed, and the scaling of the Y-axis can be fixed to allow graph traces to be compared. The Y-axis can be swapped, this means that values with similar units or range can be set to use the same Y-axis. If graph definitions have been set up they can be loaded when needed, or the existing graph definition can be saved as a graph definition. A graph can be printed, or the points of a particular trace displayed as a list of points. Recorded graphs can be playback or graph recording can be specified. The graph can be recorded to the 963’s database for playback later, or can be recorded to a text file for use in other applications.

3.5.4 Load a Graph Definition

The specifications about which traces appear on a graph, how the grid etc is set up can be saved as a graph definition. These set ups can be loaded later, the set up of the graph is retained, but the latest data will be displayed. This saves time if there are graph traces that are viewed and analysed in the same way on a regular basis.

To load a graph definition:
1. Display the page containing the button that enables the graph definition to be loaded as described in the ‘Display a Schematic Page’ section of this manual and click the button or graphic that displays the required graph definition.

Or
1. Display either a compact graph, or a precision graph as described in the appropriate section of this manual, and on the File menu click Load, or right-click in the right of the Device Viewer, and on the displayed menu click Load a saved graph-setup. The Please choose a graph definition dialogue box is displayed.
If there are more than 500 graph set-ups available the <500 and 500> buttons will be enabled to provide access to the others. The list can be filtered by clicking **Enable**, clicking the field that you want to filter on in the **Search** field box, entering the search text in the for this text box and clicking **Apply**.

2. Click the required graph definition in the list.
3. Click **OK**.

### 3.5.5 Display the Graph Data

The coordinates of a graph trace can be displayed on the **Data** tab.

**To display the graph data:**
1. Display either a compact graph, or a precision graph as described in the appropriate section of this manual.
2. Click the **List** tab.
3. In the **Select Trace** box click the required trace. A dialogue box is displayed containing the coordinates.

![Graph Data Table](image)

The data can be sorted by value, and time by clicking on the top of the appropriate column.

### 3.5.6 Zoom in and Out of a Graph

It is possible to zoom in and out on any graph so that the data can be more easily seen.

**To zoom in on the graph:**
1. Display the graph as described in the appropriate section of this manual.
2. Hold down hold down the left mouse button and drag over the area you want to zoom in on, or on the **Graph** menu click **Zoom In**. To zoom out on the **Graph** menu click **Zoom Out**. To zoom in again, repeat the process. If the number of points will no longer fit on the graph, left and right arrows will be displayed to allow the other points to be viewed. To return to the original zoom level on the **Graph** menu click **Zoom to original**.
3.5.7 Formatting Graphs

3.5.7.1 Specify Traces

3.5.7.1.1 Add a Trace to a Graph

If once a graph is displayed additional traces (values) can be added.

**To add a trace to a graph:**

1. View the value that is to be added to the graph in the **Device Viewer** as described in the ‘Display the IQ System’ section of this manual and drag it on to the graph.

or

On the **Traces** menu click **Add Trace**. The Drag sensors form this window on the graph dialogue box is displayed.

If the graph was displayed from a schematic page the dialogue box will contain all the sensor on the schematic page. If the graph was displayed from the **Device Viewer** the dialogue box will contain all the sensors currently displayed in the **Device Viewer**.

2. Drag the required value on to the graph.

3.5.7.1.2 Delete a Trace from a Graph

Traces (values) can be removed from a graph.

**To delete a trace from a graph:**

1. On the **Traces** menu click **Delete Trace**. The **Traces** dialogue box is displayed.

2. Click the trace that is to be deleted.

3. Click **OK**. A dialogue box asking for confirmation of the deletion is displayed, click **Yes**.
3.5.7.1.3 Change a Trace's Logging Interval

If a sensor is being logged at different intervals in the IQ controller it is possible to specify which one of the logs is used for the graph.

**To change a trace's logging interval:**
1. On the Traces menu click **Edit Trace**. The Traces dialogue box is displayed.
2. Click the trace for which the logging interval is to be changed.
3. Click **OK**. The Choose Logging Interval dialogue box is displayed.
4. Click the required logging interval. 
   *Note that only the intervals at which the value is logged in the controller will be available for selection*
5. Click **OK**.

3.5.7.2 Display a Grid on a Graph

963 can display a vertical and/or horizontal grid on any graph. When a horizontal grid is selected, the grid can be based on either the left, or right hand axis.

**To display a horizontal grid:**
1. Display either a compact graph, or a precision graph as described in the appropriate section of this manual.
2. On the Graph menu point to **Grid**, and click **Left** or **Right**, depending which axis is to be used for the grid.

**To display a vertical grid:**
1. Display either a compact graph, or a precision graph as described in the appropriate section of this manual.
2. On the Graph menu point to **Grid**, and click **X-Grid**.

3.5.7.3 Fix the Scaling of the Y Axis

The scaling of the Y-axes can be fixed enabling easy comparison of graphs. When the scale of an axis is fixed if a value is outside the current range the axis will not be adjusted to plot the value.

**To fix the scaling of the Y axis:**
1. Display either a compact graph, or a precision graph as described in the appropriate section of this manual.
2. On the Graph menu click either **Fix left scale** or **Fix right scale**, depending for which axis the scaling is to be fixed. The Config dialogue box is displayed.
3. Enter the maximum value for the axis in the text box.
4. Click the Y min tab.
5. In the box enter the minimum value for the axis.
6. Click **OK**.

To return the axis to automatic scaling, set the Y max value to -9999.
3.5.7.4 Swap a Traces Y Axis

The Y-axis used by a particular trace can be swapped from left to right, or vice versa. This means that sensors with similar values can be set to use the same Y-axis.

To swap the Y axis for a particular trace:
1. Display either a compact graph, or a precision graph as described in the appropriate section of this manual.
2. Select the trace for which the Y-axis is to be swapped for the list in the top right of the dialogue box.
3. On the Graph menu click Swap Y axis.

3.5.8 Save a Graph Definition

The specifications about which traces appear on a graph, how the grid etc is set up can be saved as a graph definition. These set ups can be loaded later, the set up of the graph is retained, but the latest data will be displayed. This saves time if there are graph traces that are viewed and analysed in the same way on a regular basis.

To save a graph definition:
1. Display either a compact graph, or a precision graph as described in the appropriate section of this manual.
2. Set up the traces, axis etc as required.
3. Once the graph is set up as required on the File menu click Save. The Enter a name for this graph configuration dialogue box is displayed.

4. In the box enter the name for the graph definition. The name can be up to 255 characters long.
5. Click OK. The sensor references, logging intervals, scaling, which axis for each sensor and charting mode (if selected) will be saved.

3.5.9 Print a Graph

963 can print out graphs to any Windows printer accessible to the PC running 963.

To print a graph:
1. Display either a compact graph, or a precision graph as described in the appropriate section of this manual.
2. On the File menu click Print. The Print dialogue box is displayed.
3. In the Name box click the required printer.

   Note that changing the printer from here will change the page printer used by 963 to print out pages, graphs, and alarm priority statistics.

5. If necessary click Properties to set up the printer as required.
6. In the Number of copies box enter the number of copies required.
7. If a print template is to be used select the Use Template check box, and click the required template from the list.

   Note that if the print template changed the 963 will remember it, and that will be the template selected next time.
8. Click OK.

Clicking Print Preview on the File menu will preview what will be printed.
3.6 Occupation Times

3.6.1 View Occupation Times

The occupation times of the different controllers on the system can be viewed.

To view the occupation times for a particular day:

1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Diary to select the Diary Display.
3. Click the Group Time Planner tab.
4. Click the required diary group in diary navigation structure below to specify which diary group the times are to be viewed.

The Group Time Planner will indicate whether a day follows the normal occupation times, or an exception using the display colour specified for the template. If the required day is not visible click or until it is visible.
5. Click the exception. Information about the exception is displayed on the screen. A dot in the top right corner of a day indicates that the day has more than one exception applied, moving the mouse over the day will display more information.

3.6.1.1 View a Zone’s Occupation Status

To view a zones occupation status:

1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Diary to select the Diary Display.
3. Click the Group setup and status tab.
4. Click the time zone in the list at the bottom of the screen to highlight it.
5. Click Refresh live values. The status of the zone is updated in the list.

3.6.1.2 View the Occupation Times in a Controller

To view the actual occupation times for a time zone in a controller:

1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Diary to select the Diary Display.
3. Click the Group setup and status tab.
4. Click the time zone in the list at the bottom of the screen to highlight it.
5. Click View actual zone times. This displays a dialogue box asking if you want to view the standard times.
6. To view the current week times click No, to view the standard week click Yes. A dialogue box is displayed.
### 3.6.1.3 Specify the Colour Used for a Day’s Periods

The colour used to represent the periods in the **Diary Week Day Scheme Editor**, and the colour used when to indicate the selected period can be specified.

**To specify the colour used for a day’s periods:**

1. When the **Diary Week Day Scheme Editor** is displayed, right-click the day, and click **Choose Colour**. The **Color** dialogue box is displayed.

2. Click the required colour. To use a custom colour click **Define Custom Colors**.
3. Click **OK**.

To specify the colour used to indicate which period is selected repeat the process above, but click **Choose Selection Colour**.

### 3.6.2 Adjust Occupation Times

During the course of normal operation, it will be necessary to change occupation times of the system. If the weekly working times of an area have changed permanently it is necessary to change the normal occupation times for the diary group(s) controlling that area. If a day requires its occupation times to be different to the normal times (e.g. a bank holiday) an exception should be added. Exceptions can be added using a template, using the wizard, or on a one off basis. The changes will automatically be sent to the controller before they are required. If a controller is operating the wrong times during a day it is possible to change the times in the controller by adjusting the time zones directly.

#### 3.6.2.1 Add an Exception

##### 3.6.2.1.1 Add an Exception Using a Template

**To add an exception using a template:**

1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the **Mode** menu click **Diary** to select the **Diary Display**.
3. Click the **Group Time Planner** tab.
4. Click the part of the diary navigation structure below containing the groups that are to have the exception applied.
5. On the **Group Time Planner** tab click the day to which the exception is to be added and click **Apply Time Scheme**, or right-click the day to which the exception is to be added and click **Apply Time Scheme**. To select a range of days right-click the first day and drag the mouse over them. If the required day is not visible click or until it is visible. A dialogue box is displayed listing the templates that can be used for the exception.
6. Click the required template. A dialogue box asking if you want to download the changes now or configure the scheduler to do it later is displayed, click the required option and then click **OK**.

*Note that when adding an exception to more than one diary group 963 checks the other groups to see if there is already template with the same name. If there is, 963 uses the times from that template.*
3.6.2.1.2  Add an Exception Using the Wizard

To add an exception using the wizard:

1. Log in as described in the ‘Log In’ section of this manual.

2. Click or on the Mode menu click Diary to select the Diary Display.

3. Click the Group Time Planner tab.

4. Click the part of the diary navigation structure below which groups are to have the exception applied.

5. Click Exception Wizard. The Configure Exception dialogue box is displayed.

6. In the Name box enter the name for the exception, or click an existing label.

   Note that when adding an exception to more than one diary group 963 checks the other groups to see if there is an exception with the same name. If there is, 963 uses the times from the existing exception.

   Note that exceptions with the same label can have different operating times specified.

7. Click Apply day profile to specify to have the same operating times, or click Apply weekday set to specify individual times for each weekday.

8. Click Next.

9. In the Available times box click the template that is to supply the times from the list. This list will contain all the templates from all the groups below the selected point in the diary navigation structure that have the same name.

   If the exception is being added to a single diary group it is possible to either create a new template by clicking Add new times, or existing times can be changed by clicking Edit selected times.

10. Select the Repeat this exception yearly check box if the exception is the same each year (e.g. Christmas day).

11. Click Next.

12. Select the day(s) to which the exception is to apply. To select individual days click them. To select a range of days drag the mouse over them. To deselect a day or range of days click it. If the required day is not visible click or until it is visible.

13. Click Next. A dialogue box is displayed describing the exception.

14. Click Finish. A dialogue box asking if you want to download the changes now or configure the scheduler to do it later is displayed, click the required option and then click OK.

   Note that if the changes are for today they are sent immediately.
3.6.2.1.3  Add a One Off Exception

To add a one off exception:

1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Diary to select the Diary Display.
3. Click the Group Time Planner tab.
4. Click the diary group to which the exception is to be applied.
5. On the Group Time Planner tab click the day to which the exception is to be added and click Create One Off, or right-click the day to which the exception is to be added and click Create One Off. To select a range of days right-click the first day and drag the mouse over them. If the required day is not visible click or until it is visible. A dialogue box is displayed listing the templates that can be used for the exception. The Diary Week Day Scheme Editor dialogue box is displayed.

6. In the Name box enter the name for the exception.
7. Specify the colour used to represent days that use these times by clicking Choose selecting the required colour from the dialogue box that is displayed, and clicking OK.
8. Set up the operating times for the first period of occupancy as required by dragging each end of the bar to specify the times. To add another period click and drag to the right, and then drag each end of the bar to specify the times. To set occupation for the whole day, right-click the day and click On all day. To set non-occupation for the whole day, right-click the day and click Off all day. The times can be specified by clicking the required period or right-clicking and clicking Next Period or Last Period. The start and stop times for the period can then be specified by entering them in the Start Hours, Start Minutes, Stop Hours, and Stop Minutes boxes.
11. Once the occupation times are correctly set up, click OK. A dialogue box asking if you want to download the changes now or configure the scheduler to do it later is displayed, click the required option and then click OK.

Note that if the changes are for today they are sent immediately.

3.6.2.1.4  Delete an Exception

Exceptions that are no longer required can be deleted.

To delete an exception:

1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Diary to select the Diary Display.
3. Click the Group Time Planner tab.
4. Click the part of the diary navigation structure containing the exception that is to be deleted.
5. Right-click the exception, and click Delete, or click the exception to select it, and then click Delete Exception(s). If the required exception is not visible click or until it is visible. A dialogue box is displayed asking for confirmation of the deletion.
6. Click Yes.
3.6.2.1.5 Edit an Exception

Once an exception has been set up it can be edited to adjust the times, or change the day(s) to which it applies.

To edit an exception:
1. Log in as described in the ‘Log In’ section of this manual.

2. Click or on the Mode menu click Diary to select the Diary Display.

3. Click the Group Time Planner tab.

4. In the Navigator click the part of the diary navigation structure containing the exception that is to be edited.

5. Right-click the exception, and click Edit, or click the exception to select it, and then click Edit Exception.
   If the required exception is not visible click or until it is visible.

6. Edit the exception as required.

7. Click Finish.

3.6.2.2 Change Normal Occupation Times

The normal occupation times for a diary group can be changed by editing the times or if week set templates have been added one of these can be used to specify the normal occupation times.

To change the normal operating times for a diary group:
1. Log in as described in the ‘Log In’ section of this manual.

2. Click or on the Mode menu click Diary to select the Diary Display.

3. In the Navigator click the diary group for which normal occupation times are to be changed.

4. Click the Time Schemes tab.

5. In the Default times selection for group area click the week set template that is to provide the new normal occupation times.

Or

1. Log in as described in the ‘Log In’ section of this manual.

2. Click or on the Mode menu click Diary to select the Diary Display.

3. Click the diary group for which operating time are to be set up.

4. Click the Time Schemes tab.

5. In the Configured schemes box click the template currently supplying the normal occupation times (see Default times selection for group area if you are unsure). The normal times will be displayed in the right of the screen.

6. Click Edit. A dialogue box asking if you are sure you want to edit the default times is displayed, click Yes. The Week Day Scheme Editor dialogue box is displayed.

7. If required specify the colour used to represent days that use these times by clicking Choose and selecting the required colour from the dialogue box that is displayed, and clicking OK.
8. Set up the operating times for the first period of occupancy on Monday as required by dragging each end of the bar to specify the times. To add another period click and drag to the right, and then drag each end of the bar to specify the times.

   To set occupation for the whole day, right-click the day and on the displayed menu On all day. To set non-occupation for the whole day, right-click the day and on the displayed menu Off all day. To specify the times click the required period or right-click and click Next Period or Last Period. The start and stop times for the period can then be specified by entering them in the Start Hours, Start Minutes, Stop Hours, and Stop Minutes boxes.

9. Repeat step (8) for the rest of the rest of the days in the week.

   Occupation times from one day can be copied and then pasted to another day, or the entire week, by right-clicking the day whose times are to be copied, and click Copy Day. Then right-clicking the day to which the times are to be pasted, and on the displayed menu click Paste Day. To paste the times to the entire week right-click and click Paste for week, and to paste them just to the working week (Monday to Friday) week right-click and on the displayed menu click Paste for working week. A single period can be copied by right-clicking it, and on the displayed menu clicking Copy, it can then be pasted where required in a similar way to pasting the entire day. To set occupation for the entire week, right-click and on the displayed menu click On all week. To set non-occupation for the entire week, right-click and on the displayed menu Off all week. Existing times can be loaded as described in the ‘Load Existing Times’ section of this manual, or loaded from a controller as described in the ‘Load Times From a Controller’ section of this manual.

10. Once the occupation times are correctly set up click OK. A dialogue box asking if you want to download the changes now or configure the scheduler to do it later is displayed, click the required option and then click OK.

3.6.2.2.1 Resend Occupation Times

   It is possible reschedule the download of occupation times to controllers immediately, or at the normal download time. This is useful if a failure has occurred when sending the occupation times to a controller. It will send the default occupation times, and any exceptions that are due.

   To resend occupation times:

   1. Log in as described in the ‘Log In’ section of this manual.
   2. Click Diary or on the Mode menu click Diary to select the Diary Display.
   3. Click the Group setup and status tab.
   4. In the Navigator click the Diary Group for which the times are to be downloaded.
   5. Click the time zone for which a manual download is required. More than one time zone can be selected by holding down the CTRL key, and clicking the required time zones. A range can be selected by holding down the SHIFT key, and then clicking the first and last item in the range.
   6. Click Re-send zone times to selected IQ. A dialogue box is displayed asking for confirmation of the download.
   7. Click Yes. The Please confirm action dialogue box is displayed.

   8. Click the required option to either download the changes now, or to configure the download for the group’s scheduled download time.
   9. Click OK.
3.6.2.2.2 Delete the Exception Cache

If the 963 attempts to delete exceptions from an IQ3 controller and it is unable to do so e.g. if the exception has already been deleted from the controller the exception cache will need to be deleted to synchronise the supervisor with the controller.

To delete the exception cache:

1. Log in as described in the ‘Log In’ section of this manual.
2. Click \* or on the Mode menu click Diary to select the Diary Display.
3. Click the Group setup and status tab.
4. Click Delete IQ3 internal exception cache. The 963 dialogue box is displayed.
5. Click Yes.

3.6.2.2.3 View Download Failures

To view the download failures:

1. Log in as described in the ‘Log In’ section of this manual.
2. Click \* or on the Mode menu click Diary to select the Diary Display.
3. Click the Report tab.
4. Click Current Download Failures to view the current failures, or All download failures to view all the failures.

3.6.2.2.4 View Download History

To view the download history:

1. Log in as described in the ‘Log In’ section of this manual.
2. Click \* or on the Mode menu click Diary to select the Diary Display.
3. Click the Report tab.
4. Click Full download history.

3.6.2.3 Adjust a Time zone

The occupation times of the controllers on the IQ system (i.e. when they are in occupancy) are set by the times defined in the diary group they belong to, it is possible to override those times.

To adjust a time zone:

1. Log in as described in the ‘Log In’ section of this manual, display the page that enables the time zone to be overridden, and click the area of the screen that enables the time zone to be overridden.
   Or
   Click \* or on the Mode menu click Diary to select the Diary Display, then click the Group setup and status tab, and click the time zone that is to be overridden in the list at the bottom of the screen to select it, and click ‘Override zone time’.
   Or
   Click \* or on the Mode menu click Device Viewer to select the Device Viewer. Then click the site, Lan, or device containing the time zone that is to be overridden, click Zones, and then right-click the time zone that is to be overridden, and on the displayed menu click Adjust Point.

This displays a dialogue box asking if you are sure you want to make changes.
2. Click Yes.
3. If adjusting a time zone in a pre-IQ3 controller a dialogue box asking if you what times are to be adjusted. Click Today and next 6 days to adjust the current week’s times, or click Default Times to adjust the default times. A dialogue box is displayed.
Note that changing the default times in this way will mean that the times in the controller will no longer match the ones in 963.

4. Set up the operating times for the first period of occupancy on Monday as required by dragging each end of the bar to specify the times. To add another period click and drag to the right, and then drag each end of the bar to specify the times.

To set occupation for the whole day, right-click the day and click On all day. To set non-occupation for the whole day, right-click the day and the click Off all day. The times can be specified by clicking the required period, or right-clicking and click Next Period or Last Period. The start and stop times for the period can then be specified by entering them in the Start Hours, Start Minutes, Stop Hours, and Stop Minutes boxes.

5. Repeat step (4) for the rest of the rest of the days in the week.

Occupation times can be copied from one day and then pasted to another day, or the entire week, by right-clicking the day whose times are to be copied, and clicking Copy Day. Then right-clicking the day to which the times are to be pasted, and on the displayed menu Paste Day. To paste the times to the entire week right-click and click Paste for week, and to paste them just to the working week (Monday to Friday) week right-click and click Paste for working week. A single period can be copied by right-clicking it, and click Copy, it can then be pasted where required in a similar way to pasting the entire day. To set occupation for the entire week, right-click and on the displayed menu click On all week. To set non-occupation for the entire week, right-click and on the displayed menu click Off all week. Existing times can be loaded as described in the ‘Load Existing Times’ section of this manual, or loaded from a controller as described in the ‘Load Times From a Controller’ section of this manual.

6. Once the occupation times are correctly set up click OK.
3.6.3 Printing

3.6.3.1 Print the Calendar

963 can print out the contents the calendar.

To print the calendar:
1. View the required occupation times as described in the ‘View Occupation Times’ section of this manual.
2. Click Print. The Print dialogue box is displayed.

3. In the Name box click the required printer.
4. Set up the printer as required.
5. In the Number of copies box enter the number of copies required.
6. Click Print. You can preview what will be printed by clicking Print Preview, the printer can be set up by clicking Print set up.

3.6.3.2 Print a List of a Diary Group’s Timezones

It is possible to print a list of the time zones linked to a particular Diary group.

To print a list of a diary group’s time zones:
1. Log in as described in the ‘Log in’ section of this manual.
2. Click or on the Mode menu click Diary to select the Diary Display.
3. Click the Group setup and status tab.
4. Click the required diary group in the navigation structure,
5. Right-click the list of time zones, and click Print. The Print dialogue box is displayed.

6. In the Select Printer box click the required printer.
7. Set up the printer as required.
8. In the Number of copies box enter the number of copies required.
9. Click Print.

You can preview what will be printed by right-clicking the list, and clicking Print Preview.
3.7 Record Data

3.7.1 Record a Graph Automatically

963 can automatically record data logged in controllers on the IQ system at specified intervals when the system is quiet (e.g. at night).

To record a graph automatically:
1. Ensure that the sensor(s) whose data 963 is to record is being logged in the controller. This should be checked with the strategy designer if there is any uncertainty.
2. Display either a compact graph, or a precision graph containing the sensors whose data is to be recorded as described in the appropriate section of this manual.
3. On the Data recording menu click Configure automatic recording for these sensors. The Choose a Logging interval dialogue box is displayed.
4. Click the required option to select the logging interval that is to be used.
5. Click OK. A dialogue box is displayed.
6. Click Yes if precision logs are required otherwise click No. If precision logs were not specified go to (9), if they were the Number of values to collect dialogue box is displayed goto (7).
7. In the box enter the number of values that are to be collected each time the action is carried out (maximum value 1000).
8. Click OK. A dialogue box is displayed.
9. In the First event box enter the date and time when the data is to be first recorded in the following format: dd/mm/yy hh:mm:ss
   To specify the event to occur now, click Now.
10. If the recording is to be performed more than once, select the Do you wish to repeat this action? check box, and go to step (11). If the recording is to only be performed once, clear the Do you wish to repeat this action? check box, and go to step (14).
11. In the Choose an interval box click the interval at which the recording is to occur.
12. In the .and how many times to repeat it box click how many times recording is to occur.
13. If Day or Week was specified as the interval, select the check box for the day(s) of the week recording is to occur. If Day was selected, all seven days can be selected. If Week was selected, only one day can be selected.
14. Click Next>. A dialogue box providing a summary of what is to be recorded is displayed.

15. Check that the recording is set up correctly, and then click Finish.
16. Click OK to close the graph.

3.7.2 Record a Graph Manually

963 enables data logged in controllers on the IQ system to be recorded manually. The data can either be recorded to the 963’s database, or to a text file.

To record data manually to the 963’s database:
1. Ensure that the sensor(s) whose data 963 is to record is being logged in the controller. See the strategy designer about this if you are unsure.
2. Display either a compact graph, or a precision graph containing the sensors whose data is to be recorded as described in the appropriate section of this manual.
3. On the Data recording menu click Record collected data. The Record Collected Data Format dialogue box is displayed.

4. Click Database.
5. Click Finish. The data displayed in the graph will be recorded to the 963’s database.

To record data manually to a text file:
1. Ensure that the sensor(s) whose data 963 is to record is being logged in the controller. See the strategy designer about this if you are unsure.
2. Display either a compact graph, or a precision graph containing the sensors whose data as described in the appropriate section of this manual.
3. On the Data recording menu click Record collected data. The Record Collected Data Format dialogue box is displayed.

4. Click Text File. The Text File Parameters dialogue box is displayed.
5. In the **Field separator** box enter the required field separator.
6. In the **Record separator** box enter the required record separator.
7. Click **Next >**. The **Data File Location** dialogue box is displayed.

8. Click **Choose Location**. The **Save As** dialogue box is displayed.

9. In the **File name** box enter the required file name. To store the file in a different location, click the drive, or folder in the **Save in** box that contains the file, and double-click the folders in the **folder list** until the required location is displayed.
10. Click **Save** to return to the **Record Collected Data** dialogue box.
11. Click **Finish**. The data will be recorded.
12. Click **Finish** to close the dialogue box.
### 3.7.3 Record a Schematic Page

Recording schematic pages automatically enables 963 to record data at specified intervals preferably when the system is quiet (e.g. at night). The page is automatically loaded and the values collected from it. If any value on the page in a wait or error state the recording is logged as failed and the point that caused the failure is reported.

**To record a schematic page automatically:**

1. Display the page that is to be recorded.
2. On the **Data Recording** menu click **Configure page recording**, or right-click anywhere on the page and click **Data Recording** and then click **Configure data recording**. A dialogue box is displayed.

3. In the **First event** box specify when the data is to be first recorded by entering the date and time in the following format:

   dd/mm/yy hh:mm:ss

   To specify the event to occur now, click **Now**.

4. If the recording is to be performed more than once, select the **Do you wish to repeat this action?** check box, and go to step (5). If the recording is to only be performed once, clear the **Do you wish to repeat this action?** check box, and go to step (8).

5. In the **Choose an interval** list click the interval at which the recording is to occur.

6. In the **and how many times to repeat it** list select how many times recording is to occur.

7. If **Day** or **Week** was specified as the interval, select the check box for the day(s) of the week recording is to occur. If **Day** was selected, all seven days can be selected. If **Week** was selected, only one day can be selected.

8. Click **Next >**. A dialogue box is displayed.

9. Check that the recording is set up correctly, and then click **Finish**.
3.8 Playback Recorded Data

If data from a sensor logged in a controller has been recorded by 963 the recorded information can be graphed:

To playback a recorded graph:
1. Display the graph for which recorded data is to be played back.
2. On the Data recording menu click Load Recorded data. The 963 dialogue box is displayed.

3. Click Yes if the existing graph is to be recorded before the recorded data is displayed, click No if existing data is to be not to be saved. If Yes was selected 963 will allow you to record the graph as described in the ‘Record a Graph Manually’ section of this manual. Once the graph has been recorded the Data Retrieval Options dialogue box is displayed goto (4). If No was selected the Data Retrieval Options dialogue box is displayed.

4. Select the required option to specify the source of the data. The table below describes the different options. If 963 Database was selected the Data Retrieval Data Range dialogue box is displayed, goto (9). If External 963 Database or External 963 Access Database was selected goto (5)

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>963 Database</td>
<td>Data is retrieved from the 963’s database.</td>
</tr>
<tr>
<td>External 963 Access Database</td>
<td>Data is retrieved from an access database used by pre v2.0 963</td>
</tr>
<tr>
<td>External 963 Database</td>
<td>Data is retrieved from an external 963 database e.g. data that has been archived.</td>
</tr>
</tbody>
</table>

5. Click Finish. The Data Retrieval File Source dialogue box is displayed.

6. Click Select data file. The Open dialogue box is displayed.
7. In the folder list box click the required database. To select a database in a different location, click the drive, or folder in the Look in box that contains the file, and double-click the folders in the folder list until the required location is displayed.
8. Click Open. To return to the Recorded Data retrieval dialogue box.
9. Click Finish. The Data Retrieval Data Range dialogue box is displayed.

10. Click All, Last Day, Last Week, Last Month, or Last Year to specify the required period. To specify a specific date range click Custom Date Range, click Choose Date to display another dialogue box and specify the start date for the date range. Click Next to specify the last date in the range and click Finish.
11. Click Finish the recorded graph will be displayed. To display the next 1000 values click Next points>>>

To close the graph click ❌.

3.8.1 Playback a Recorded Page

If a page has been recorded, it can be played back at any time.

To playback a recorded page:
1. Display the page that is to be recorded.
2. On the Data Recording menu click View recorded data, or right-click anywhere on the page and on the displayed menu point to Data Recording and click View recorded data. The 963 Schematic Playback Mode dialogue box is displayed.

The page is now displaying the recorded data indicated in the dialogue box. Click >> to display the next set of recorded data, and << to display the previous set of data. To return to live data click Return to live data display. The 963 Schematic Playback Mode dialogue box can be collapsed to make more room on the screen by clicking ▲.

A sub set of the data sets can be specified, i.e. If there is a year’s worth of data it is possible restrict the data set available to a particular week.
To specify a particular set of data:
1. Display the recorded page as described above.
2. Click **Choose date range**. The **Data Retrieval Data Range** dialogue box is displayed.

3. Click **All**, **Last Day**, **Last Week**, **Last Month**, or **Last Year** to specify the required period. To specify a specific date range click **Custom Date Range**, click **Choose Date** to display another dialogue box and specify the start date for the date range. Click **Next** to specify the last date in the range and click **Finish**.

4. Click **Finish**.

If required the database from which the data is obtained can be specified. This enables data that has been archived, or data sorted in a 963 Access database (used by pre v2.0 963s) to be played back.

To specify another database:
1. Click **Choose Data source**. **Data Retrieval Options** dialogue box is displayed.

2. Select the required option to specify the source of the data. If **963 Database** was selected the **Data Retrieval Data Range** dialogue box is displayed, goto (7). If **External 963 Database** or **External 963 Access Database** was selected goto (3). The table below describes the different options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>963 Database</td>
<td>Data is retrieved from the 963’s database.</td>
</tr>
<tr>
<td>External 963 Access Database</td>
<td>Data is retrieved from an access database used by pre v2.0 963</td>
</tr>
<tr>
<td>External 963 Database</td>
<td>Data is retrieved from an external 963 database e.g. data that has been archived.</td>
</tr>
</tbody>
</table>

3. Click **Finish**. The **Data Retrieval File Source** dialogue box is displayed.

4. Click **Select data file**. The **Open** dialogue box is displayed.
5. In the folder list box click the required database. To select a database in a different location, click the drive, or folder in the Look in box that contains the file, and double-click the folders in the folder list until the required location is displayed.
   Note that if External 963 Access Database was selected in step (2) a mdb file must be selected, if External 963 Database was selected an archived database file (_sys.mdf) must be selected.

6. Click Open. To return to the Recorded Data retrieval dialogue box.

7. Click Finish. The Data Retrieval Data Range dialogue box is displayed.

8. Click All, Last Day, Last Week, Last Month, or Last Year to specify the required period. To specify a specific date range click Custom Date Range, click Choose Date to display another dialogue box and specify the start date for the date range. Click Next to specify the last date in the range and click Finish.

9. Click Finish the recorded page will be displayed. To display the next 1000 values click Next points>>>. To close the graph click X.
3.9 Display the IQ System

The Device Viewer enables inputs, adjustments, and drivers from the selected part of the system to be displayed. (E.g. if the internetwork is selected, all values from the internetwork are displayed, and if a particular Lan is selected, only values from that Lan are displayed). The types of values displayed can be filtered by type (inputs, sensors, digital inputs, virtual inputs, critical alarms, adjustments knobs, switches, timezones, drivers, analogue drivers, and digital drivers). The list of values can be sorted by column (label, units, item, Lan, OS, or PIN Level).

To view a value:

1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Device Viewer to select the Device Viewer.
3. Click the site, Lan, or device containing the values that are to be displayed. To view values from more than one site click Global.

   Note that the Navigator can be refreshed by right clicking it, and clicking Redraw Network from the displayed menu. If there is not a plus or minus next to a folder that should have one this is because to save time building the tree structure 963 builds the tree as required so just click on the required folder and it will build the required part of the tree.
4. Click one or more of the buttons to display those item types. Selected items will change colour.

<table>
<thead>
<tr>
<th>Icon</th>
<th>What is Displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sensors</td>
</tr>
<tr>
<td></td>
<td>Digital Inputs</td>
</tr>
<tr>
<td></td>
<td>Virtual sensors (calculated MKT values)</td>
</tr>
<tr>
<td></td>
<td>Critical Alarms</td>
</tr>
<tr>
<td></td>
<td>Knobs</td>
</tr>
<tr>
<td></td>
<td>Switches</td>
</tr>
<tr>
<td></td>
<td>Time Zones</td>
</tr>
<tr>
<td></td>
<td>Analogue Driver</td>
</tr>
<tr>
<td></td>
<td>Digital Driver</td>
</tr>
</tbody>
</table>

To select all inputs click Inputs, to select all adjustments click Adjustments, and to select all drivers click Drivers. All the icons for the select type will turn red. To de-select all selected inputs click Inputs, to de-select all selected adjustments click Adjustments, and to de-select all selected drivers click Drivers.

5. If the display is to be filtered further enter the required search string into the Search box, and click . This causes 963 to only display items of the selected item types whose label matches the search string. An asterisk ‘*’ can be used as a wildcard, to specify any number of any characters. Previously used searches are remembered, and can be selected from the list in the Search box.

6. Sort the values by clicking the appropriate column heading, either by label, units, item, Lan, OS, or PIN Level.

Normally the values are updated every 30s, however they can be updated manually when required by clicking . Values can be adjusted by right-clicking the value that is to be adjusted, and clicking Adjust Point. Compact graphs can be displayed by right clicking the value that is to be graphed and clicking Graph Point(s). Precision graphs can be displayed by right-clicking the value and clicking Collect full precision log graph(s).

When running 963 Secure the mean kinetic temperature can be calculated for a sensor value by right-clicking the sensor and clicking Calculate MKT. In order to calculate the MKT value the sensor’s data must be being recorded by 963.

Note that the value calculated is not saved anywhere, if 963 is to store the result, a scheduled MKT calculation must be set up, see the 963 Engineering manual; for details.

7. Log off when the use of 963 is finished.
3.9.1 Print the Device Viewer

963 can print out the contents of the Device Viewer to any Windows printer accessible to the PC running 963.

**To print the Device Viewer:**
1. View the Device Viewer as described in the ‘View the IQ System’ section of this manual.
2. Right-click the Data Display, and on the displayed menu click Print. The Print dialogue box is displayed.

3. In the Select Printer box click the required printer.
4. Set up the printer as required.
5. In the Number of copies box enter the number of copies required.
6. Click Print.

You can preview what will be printed by pointing to Print on the File menu and clicking Print Preview, or right-clicking the page, and on the displayed menu pointing to Print and clicking Print Preview.

3.10 Display Scheduled Events

The Event Scheduler Display contains information about events that 963 is going to perform in the future. It displays things that 963 has been set to perform by the engineer; it can also displays actions created by 963’s Diary functions.

**To view scheduled events:**
1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Scheduler to select the Event Scheduler Display. The display shows a list of the events.

3. Specify which events are to be displayed by clicking the appropriate option in Navigator. If the text does not fit in the column, the column can be resized by dragging the edge to the correct size.

To print the list right-click anywhere in the list, and on the displayed menu Print. The list can also be saved to an HTML, or inserted in an HTML file in a similar way.
3.10.1 Print the Scheduled Events

963 can print out the scheduled events to any Windows printer accessible to the PC running 963.

To print the scheduled events:
1. View the Scheduled Events as described in the ‘Display Scheduled Events’ section of this manual.
2. Right-click the Data Display, and on the displayed menu click Print. The Print dialogue box is displayed.
3. Select the required printer.
4. Set up the printer as required.
5. In the Number of copies box enter the number of copies required.
6. Click Print.

You can preview what will be printed by right-clicking the Data Display, and on the displayed menu clicking Print Preview.

3.11 Display IQ3 Web Pages

963 can display IQ3 Web Pages.

Note this facility is not available for BACnet devices.

To display IQ3 web pages:
1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Device Viewer to select the Device Viewer.
3. Navigate to the required controller.
4. Right-click the device, and click IQ Configuration. The selected controller's 'Welcome' web page will be displayed in a separate web browser window.

Note that the Navigator can be refreshed by right clicking it, and clicking Redraw Network from the displayed menu.

3.12 Display HTML Pages

963 can display HTML pages from the company Intranet, or the Internet, in the Web Browser Display. HTML pages can be accessed from objects on a schematic page, or from the Web Browser Display.

To display HTML pages from a schematic page:
1. View the page containing the button or bitmap that provides access to the HTML page as described in the ‘Display a Schematic Page’ section of this manual.
2. Click the button or picture that displays the required HTML page. The display changes to the Web Browser Display with the selected page displayed.
3. Use the links provided to view the information. The buttons at the top of the display allow you to navigate.

<table>
<thead>
<tr>
<th>Icon</th>
<th>What is Does</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔷️</td>
<td>Goes to the previous HTML page.</td>
</tr>
<tr>
<td>🔷️</td>
<td>Goes to the next HTML page.</td>
</tr>
<tr>
<td>❌</td>
<td>Stops the current HTML page being uploaded.</td>
</tr>
<tr>
<td>🔸️</td>
<td>Goes to the Home HTML page.</td>
</tr>
<tr>
<td>🔥</td>
<td>Updates the current HTML page.</td>
</tr>
</tbody>
</table>
To display HTML page from the Web Browser Display:
1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Internet to select the Web Browser Display.
3. Click the link for the required HTML page. If required you can enter the URL in the box next to
4. Use the links provided to view the information.

3.13 Display the Information Centre
Information about what 963 is currently doing is displayed in the Information Centre. It is displayed automatically whenever 963 is performing operations that take a long time or, it can be displayed manually.

To display the Information Centre manually:
1. On the View menu click Information Centre, or press F1.

To close the Information Centre:
1. Click Hide this window.

To stop the current 963 operation:
1. Click Cancel Command.

To access 963’s help file:
1. Click 🤔

3.14 Send an SMS Message
If 963 is licenced with SMS Direct it is possible to send an SMS (text) message to a GSM phone.

To send an SMS message:
1. On the SMS menu click Send message. The Please enter the phone number (international format) dialogue box is displayed.
2. In the box enter the phone number to which the message is to be sent including the international code. E.g.
   +4401234567890
3. Click OK. The Please enter your message dialogue box is displayed.
4. In the box enter the message.
5. Click OK. The message will be sent.
3.15 Layout the Window

3.15.1 Automatically Hide the Navigator

The Navigator can be set to automatically be hidden (autohide) when it is not required. When set to autohide the Navigator will automatically reduce it size down to a small tab when the mouse is not over it.

To automatically hide the Navigator:

1. Click [ ]. The Navigator will now be automatically hidden. To display it, move the mouse over [ ].

To display the permanently display the Navigator:

1. Move the mouse over the Navigator.
2. Click [ ]. The Navigator will now be displayed all the time.

3.15.2 Collapse Message Boxes

When certain events occur the 963 will display a message box similar to the one below to alert the user. The indicator in the title bar will flash to indicate a change. If the message box is left on the screen it can be collapsed so that it takes up less room.

To collapse a message box:

1. Click [ ]. The message box will be collapsed as shown below.

To expand a message box:

1. Click [ ].

3.15.3 Hide Selection Buttons

If required individual Selection Buttons can be hidden.

To hide a selection button:

1. Click [ ] click Add or Remove Buttons, and then click the button that is to be hidden on the displayed menu.

To unhide a button repeat the process above, hidden buttons are greyed out.

3.15.4 Hide the Menu Bar

If required the Menu Bar can be hidden.

To hide the Menu Bar:

1. On the View menu click Hide menu Bar.

To unhide the Menu Bar press F12.

3.15.5 Hide the Status Bar

The Status Bar can be hidden if required.

To hide the Status Bar:

1. On the View menu click Status Bar.
3.15.6 Minimise Selection Buttons

If required individual Selection Buttons can be minimised. When minimised the button is displayed as shown below. Clicking these minimised buttons will also display the corresponding display.

To minimise the selection buttons:

1. Click and click Show Fewer Buttons on the displayed menu. The button at the bottom of the list will be minimised.

To restore the selection buttons:

1. Click and click Show More Buttons on the displayed menu. The last button to be minimised will be restored to the main display.

3.15.7 Move the Navigator

The Navigator can be moved to the top, bottom, left, or right of the screen.

To move the Navigator:

1. Ensure that the Navigator is not set to automatically hide itself.
2. Click the bar at the top of the Navigator.
3. Drag it to the required position (top, bottom, left or right of the screen), and release the mouse button. The Navigator will be moved to its new position.

3.15.8 Reset the Display

If the Navigator, Status Bar etc have been moved and hidden and cannot be located e.g. they have been moved off the screen it is possible to reset the display so that everything is visible.

To reset the display:

1. On the View menu click Set view to default, or press F12.

3.16 Manage Your User Account

As a user of 963, you will have a user account that allows you access to 963 and determines your access rights. To maintain system security, it is important that no one else knows your username, or password. Therefore, you should change your password to make sure that no one else knows it, and it is easy to remember. It is a good idea to regularly change your password to ensure no one else can log in as you. 963 Secure will force you to change your password at regular intervals, and you will not be able to reuse old passwords.

If you forget your password, you will be unable to log in to 963, and will be unable to change the password to another one. If this is the case you must see the person responsible for administering the system and ask them to change your password.

Note that with 963 Secure after the system administrator has changed your password, time first time you log in you will be forced to change your password so that it is no longer known by the system administrator.

If 963 Secure is being used, if you enter your password incorrectly a number of times your account will become locked and you will not be able to log in. 963 Secure will display the dialogue box shown below:

The following icon in the Navigator in User Display indicates a locked user.

If this happens, you must see the person responsible for administering the system and ask them to unlock your account. Your account could become locked because you have forgotten your password and entered it incorrectly. However, it may be that someone has tried to use your account without permission. If this case, you should inform the system administrator who may wish to assign you a different username.
3.16.1 Change Your Password

You can change your password; this may be required if someone else knows it or it is difficult to remember. When deciding on the password, it is recommended that it have the following attributes:

- Be at least seven characters long.
- Use a mixture of upper and lower case characters, e.g. A and a.
- Use some numeric characters, e.g. IlikeFruit7.
- Be significantly different from previously used passwords.
- Should not use common or guessable names associated with yourself, e.g. love or your partner’s name.

Note that using 963 Secure you will not be able to re-use a password, or use one that has been used by another user.

To change your password:

1. Log in as described in the ‘Log In’ section of this manual.
2. On the User menu click Change password. The Password dialogue box is displayed.

3. In the Password box enter your password.

4. Click OK. The Set New Password dialogue box is displayed.

5. In the Password box enter your new password.

Note that passwords are case sensitive.

4. In the Confirmation box enter your new password.
5. Click OK.
3.17 Administer a 963 System

The main task of administering a 963 system is to maintain the users. This involves adding new users, deleting users that are no longer required and dealing with users who have forgotten their password. If you are administering a 963 Secure system you will also have to expire users that are no longer required instead of deleting them, and deal with users who have locked themselves out.

The administration of a non-secure system requires you to:

- Add Users
- Archive Data
- Backup the Database
- Change Access Rights
- Change a User's Password
- Change a User's Password without Knowing the Existing One
- Clear the Print Buffer
- Delete a User
- Delete Historic Records

To perform the tasks required to administer a secure system you will need to be a member of the ‘System Administrator’ workgroup. The administration of a secure system requires you to:

- Add Users
- Archive Data
- Backup the Database
- Change Access Rights
- Change a User's Password
- Change a User’s Password without knowing the existing one
- Clear the Print Buffer
- Delete Historic Records
- Expire Users
- Unlock Users

If administering a secure system you may also have the responsibility of checking the audit trail of changes that have been made by other users. This job does not require system administrator rights, and can be carried out by any user.

3.17.1 Users

3.17.1.1 Add a User

Once the 963 has been engineered, and each user set up, it may be necessary to add users to the system if for example someone new is employed, or now requires access.

When deciding on the password, it is recommended that passwords have the following attributes:

- Be at least seven characters long.
- Use a mixture of upper and lower case characters, e.g. A and a.
- Use some numeric characters, e.g. IlikeFruit7.
- Be significantly different from previously used passwords.
- Should not use common or guessable names associated with yourself, e.g. love or your partner’s name.

Note that if running 963 Secure you will not be able to re-use a password.

To add a user:

1. Log in as described in the ‘Log In’ section of this manual.
   
   \textit{Note that if running 963 Secure you must have system administrator access rights.}

2. Click \textbf{Users} in the \textit{Menu} or on the \textbf{Mode} menu click \textbf{Users} to select the \textbf{User Display}.

3. Right-click the workgroup that contains the access rights that are to be given to that user, and click \textbf{Add User}. The \textit{Operator Name} dialogue box is displayed.
Using 963

Note that a user can only be in one workgroup.

4. In the box enter the name of the user. Do not use an apostrophe.

Note that user names are case sensitive i.e. 'A N Other' is different to 'a n other'.

5. Click OK. The Set New Password dialogue box is displayed.

6. In the Password box enter the user’s password.
7. In the Confirmation box reenter the password.
8. Click OK. The user will be added to the selected workgroup.

Users of 963 Secure will be forced to change their password first time they log in.

3.17.1.2 Change a User's Access Rights

Once the 963 has been engineered, and each user’s access rights set up, it may be necessary to change the access rights for a particular user. It is not possible to do this directly because a user’s access rights are determined by the workgroup that they are in. It is possible to edit the workgroup to change the access rights, however this will assign the new access rights to all users in the workgroup, and should only be done if the access rights of all the users in the workgroup are to be changed. If this is not possible the only way to change a user’s access rights is to move the user into a different workgroup.

To move a user into a different workgroup:
1. Log in as described in the ‘Log In’ section of this manual.

   Note that if running 963 Secure you must have system administrator access rights.

2. Click Users or on the Mode menu click Users to select the User Display.
3. Navigate down the tree structure in the Navigator to display the required user.
4. Click the user that is to be moved, and choose drag it to the required workgroup.
5. Release the mouse button.

Note that sometimes when the tree is redrawn the user may be missing it is necessary to right click the tree and click Refresh View.

3.17.1.3 Change a User's Password

For users in with the authority to configure workgroups and users it is possible to change a user’s password providing the existing password is known. When deciding on the password. It is recommended that passwords have the following attributes:

   Be at least seven characters long.
   Use a mixture of upper and lower case characters, e.g. A and a.
   Use some numeric characters, e.g. likeFruit7.
   Be significantly different from previously used passwords.
   Should not use common or guessable names associated with yourself, e.g. love or your partner’s name.

Note that you will not be able to re-use a password, or use one that has been used by another user.

If a user’s password is changed in this way, the next time they log in they will be forced to change their password to ensure that only they know it.

To change a user's password without knowing the existing one:
1. Log in as a user with the authority to configure workgroups and users as described in the ‘Log In’ section of this manual.

2. Click Users or on the Mode menu click Users to select the User Display.
3. Double-click the workgroup containing the user whose password is to be changed.
4. Right-click the user whose password is to be changed, and click Change Password. The Password dialogue box is displayed.
5. In the **Password** box enter the user’s password.
6. The **Set New Password** dialogue box is displayed.

![Set New Password dialogue box]

7. In the **Password** box enter the user’s new password.
8. In the **Confirmation** box enter the new password.
9. Click **OK**.

*Note that a user can change their own password as described in the ‘Change Your Password’ section of this manual.*

#### 3.17.1.4 Change a User’s Password without Knowing the Existing One

For users in the ‘System Administrator’ workgroup it is possible to change a user’s password without the need to know the old one. This is useful if a user has forgotten his/her password. When deciding on the password, it is recommended that passwords have the following attributes:

- Be at least seven characters long.
- Use a mixture of upper and lower case characters, e.g. A and a.
- Use some numeric characters, e.g. IlikeFruit7.
- Be significantly different from previously used passwords.
- Should not use common or guessable names associated with yourself, e.g. love or your partner’s name.

*Note that you will not be able to re-use a password, or use one that has been used by another user.*

If a user’s password is changed in this way, the next time they log in they will be forced to change their password to ensure that only they know it.

**To change a user’s password without knowing the existing one:**

1. Log in as a user in the ‘System Administrator’ workgroup as described in the ‘Log In’ section of this manual.

2. Click **Users** or on the **Mode** menu click **Users** to select the **User Display**.

3. Double-click the workgroup containing the user whose password is to be changed.

4. Right-click the user whose password is to be changed, and click **Change Password**.

5. The **Set New Password** dialogue box is displayed.

![Set New Password dialogue box]

6. In the **Password** box enter the user’s new password.
7. In the **Confirmation** box enter the new password.
8. Click **OK**.

*Note that a user can change their own password as described in the ‘Change Your Password’ section of this manual.*

#### 3.17.1.5 Delete a User

963 Lite and 963 Server allow a user to be deleted if they are no longer required, e.g. the person leaves, or no longer requires access to the 963. Because of the need to maintain an audit trail it is not possible to delete a user from 963 Secure unwanted users should be expired as described in the ‘Expire a User’ section of this manual.

**To delete a user:**

1. Log in as described in the ‘Log In’ section of this manual.

2. Click **Users** or on the **Mode** menu click **Users** to select the **User Display**.

3. Right-click the user that is to be deleted, and click **Delete**. This displays a dialogue box asking for confirmation.

*Note that it is not possible to delete the 'System Administrator User' from the 'System Administrator' workgroup.*

4. Click **Yes**.
Caution: at least one user must be left in a workgroup that provides full access rights.

3.17.1.6 Expire a User

When running 963 Secure it is not possible to delete users to ensure that a complete audit trail is available. If a user is no longer required, e.g. the person leaves or no longer requires access to 963 they must be expired to ensure that they can no longer log in to the system. Once a user has been expired, they can never be unexpired.

To expire a user:
1. Log in as a user in the ‘System Administrator’ workgroup as described in the ‘Log In’ section of this manual.
2. Click on the Mode menu click Users to select the User Display.
3. Double-click the workgroup containing the user that is to be expired.
4. Right-click the user that is to be expired, and click Expire User. The Are you sure? dialogue box is displayed.
5. Click Yes.

3.17.1.7 Unlock a User

When running 963 Secure if a user incorrectly enters their password more than the maximum number of times they will be locked out of the 963 (locked), and will be unable to log in. 963 Secure will display a dialogue box.

The following icon in the Navigator when the User Display is selected indicates a locked user.

Only a user in the ‘System Administrator’ group can unlock a locked user.

To unlock a user:
1. Log in as a user in the ‘System Administrator’ workgroup as described in the ‘Log In’ section of this manual.
2. Click on the Mode menu click Users to select the User Display.
3. Double-click the workgroup containing the locked user.
4. Right-click the locked user, and click Unlock User. The Set New Password dialogue box is displayed.
5. In the Password box enter the new password.
6. In the Confirmation box enter the new password.
7. Click OK.

Note that when user is unlocked, the next time they log in, they will be forced to change their password to ensure that it is only known to them.

3.17.1.8 Unlock a System Administrator

When running 963 Secure if a system administrator user incorrectly enters their password more than the maximum number of times specified, they will be locked out of 963 (locked), and will be unable to log in.

To unlock a system administrator:
1. Log in as a user in the ‘System Administrator’ workgroup as described in the ‘Log In’ section of this manual.
If all the users in the ‘System Administrator’ workgroup are locked it will not be possible to log in as anyone with enough authority to unlock user therefore you should go directly to step (2).

2. Click or on the Mode menu click Users to select the User Display.
3. Double-click the System Administrator workgroup.
4. Right-click the locked user and click Unlock User. The Password dialogue box is displayed.

   ![Password Dialogue Box]

   If a database password has not been set up a warning message is displayed click OK to display the Set New Password dialogue box and got step (7).
5. In the Password box enter the database password. When deciding on the password it is recommended that the password be at least seven characters long, and contain a mixture upper and lower case characters, and use some numeric characters.
6. Click OK. The Set New Password dialogue box is displayed.

   ![Set New Password Dialogue Box]

   7. In the Password box enter the new password.
8. In the Confirmation box enter the new password.
9. Click OK.

   Note that the next time they log in, they will be forced to change their password to ensure that it is only known to them.

3.17.2 Data

3.17.2.1 Archive Data

The historic data (graph data, recorded schematics and alarms) within the supervisor can be archived to an external data source. The data can either be deleted from the 963’s database or kept for future reference. The archived graph data can be played back using the Load recorded data option in the Graph Window. The archived schematic data can be played back using the View recorded data option on the Data Recording menu.

To archive data:
1. Log in as described in the ‘Log In’ section of this manual.

   Note that if running 963 Secure you must have system administrator access rights.
2. On the Database menu click Archive Data. The Archive Historic Data dialogue box is displayed.
3. Click Next>. The dialogue box changes.
4. Specify the location and name of the backed up file by typing the path and filename into the **File Name** box. If required 963 variables can be used to help specify the path and filename. The default is to back up the file to the directory in which 963 is installed, the filename is `trend96X` and includes the date and time. The location of the file can also be specified by clicking **Choose file location** and browsing to the required directory. To return to the default settings click **Generate default file name**.

5. Click **Next**. The dialogue box changes.

6. Select either **All**, **Last Day**, **Last Week**, **Last Month**, **Last Year** or **Custom data range** to specify the data that is to be archived. If **Custom data range** is selected click **Choose Date** to display another dialogue box click the start date for the date range. Click **Next** and click the last date in the range and click **Finish**.

7. Click **Finish**.

8. A dialogue box is displayed asking if data is to be deleted form the database, click **Yes** to archived the data and delete it from the original database, or click **No** to just archive it.

3.17.2.2 Backup the Database

963’s database can be manually backed up to a dat file (suitable for archiving) to ensure that data is secure. The database is backed up to a specified directory and date and time-stamped. This file can be restored if necessary e.g. the database becomes corrupt as described in the ‘Restore a Backed up Database’ section of this manual.

After backing up the database in this way you may wish to delete Historic Records, as described in the ‘Delete Historic Records’ section of this manual, to reduce the size of the database.

**To backup the database:**

1. Log in as described in the ‘Log In’ section of this manual.

   *Note that if running 963 Secure you must be in the ‘System Administrator’ workgroup.*

2. On the **Database** menu click **Backup database**. The **Backup database** dialogue box is displayed.

3. Click **Next**. The dialogue box changes.

4. Specify the location and name of the backed up file by typing the path and filename into the **File Name** box. If required 963 variables can be used to help specify the path and filename. The default is to back up the file to the directory in which 963 is installed, the filename is ‘trend96X’ and includes the date and time. The location of the file can also be specified by click in **Choose file location** and browsing to the required directory. To return to the default settings click **Generate default file name**.

   *Note that the database can only be backed up to a local drive unless 963 has been correctly configured to backup to a network location as described in the ‘Configure 963 to Backup to a Network Location’ section of the 963 Engineering Manual, and the PC running 963 must be logged on to the network using the network user name specified during that configuration process.*
5. Click **Finish**. Once the backup is complete the **963** dialogue box is displayed.

6. Click **OK**.

### 3.17.2.3 Delete Historic Records

It is possible to manually delete historic records from the 963’s database to reduce size and improve system performance. Deleting historic records enables data to be removed for a specified data range.

**Caution:** before deleting historic records you should back up the database, as described in the ‘Backup the Database’ section of this manual to ensure that a complete audit trail is available in the future.

**To delete the historic records:**

1. Log in as described in the ‘Log In’ section of this manual.
   
   *Note that if running 963 Secure you must have system administrator access rights.*
   
2. On the **Database** menu click **Delete Historic Records**. A dialogue box asking for confirmation of the deletion is displayed.
3. Click **Yes**. The **Delete Historic Information** dialogue box is displayed.
4. Click **Next >**. The dialogue box changes.

5. Specify first date of the range of historic records to be deleted by using **▲** and **▼** to select the required month and year, and then clicking the day in the calendar that is displayed.
6. Click **Next >**. The dialogue box changes to enable the end date to be specified.
7. Specify last date of the range of historic records to be deleted by using **▲** and **▼** to select the required month and year, and then clicking the day in the calendar that is displayed.
8. Click **Finish**. A dialogue box asking for confirmation is displayed.
9. Click **Yes**. The specified records will now be deleted. Once the process is complete a dialogue box is displayed.
10. Click **OK**.

When running 963 Secure historic records can also be deleted by clicking **Display** right-clicking the ‘System Administrator’ workgroup, and clicking **Properties**. The **Workgroup Information** dialogue box is displayed, click the **System Administrator** tab, and then click **Delete Historic Records**. A dialogue box asking for confirmation of the deletion is displayed.
3.17.2.4 Restore a Backed up Database

If 963’s database has been backed up it can be restored if there is a problem e.g. the database becomes corrupt.

To restore a backed up database:

1. Log in as described in the ‘Log In’ section of this manual.

   Note that if running 963 Secure you must be in the ‘System Administrator’ workgroup.

2. On the Database menu click Properties. The Database Properties dialogue box is displayed.

3. Ensure that the Detach database after Supervisor has been shutdown check box is selected.
4. Select the Restore database when Supervisor restarts check box. A dialogue box is displayed prompting you to restart 963.
5. Click OK. to close the dialogue box and return to the Database Properties dialogue box.
6. Click OK to close the Database Properties dialogue box. A dialogue box is displayed reminding you that you need to restart 963.
7. Click OK.
8. Close 963 as described in the ‘Close 963’ section of this manual.
9. Rename the files 'i96x_data.mdf' and 'i96x_log.ldf' located in 963's database directory.
10. Run 963 as described in the 'Run 963' section of this manual. As 963 restarts a dialogue box is displayed asking if you want to restore a previously backed up database.

11. Click Yes. The Open dialogue box is displayed.

12. In the folder list box click the required database. To select a database in a different location, click the drive, or folder in the Look in box that contains the file, and double-click the folders in the folder list until the required location is displayed.

   The database backup file contains a reference to the original location of the database. 963 is unable to restore the database to a different location than the one specified in the ‘dat’ file. This means that if you are attempting to restore a database it must be to the same directory path as the original.

12. Click Open. The database will be restored. A dialogue box is displayed once the database has been restored.
13. Click OK.
3.17.3 View an Audit Trail

963 Secure will automatically keep track of certain aspects of the 963 as an audit trail. The audit trail lists what action was performed, when it was performed, and who did it, to provide easy traceability for changes to the system. The table below lists the items that an audit trail is available for.

<table>
<thead>
<tr>
<th>Alarm filters</th>
<th>Alarm groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alarm retransmission destinations</td>
<td>Device Viewer</td>
</tr>
<tr>
<td>Diary</td>
<td>Users</td>
</tr>
<tr>
<td>Workgroups</td>
<td></td>
</tr>
</tbody>
</table>

To view an audit trail:

1. Display the item for which an audit trail is required in the Navigator.
2. Right-click the item for which an audit trail is required, and on the displayed menu click Show audit info for this item. The List of Alarms dialogue box is displayed.

If there are more than 500 entries for the item &lt;500 and 500&gt; buttons will be enabled to provide access to the others. The list can be filtered by clicking Enable, clicking the field that you want to filter on in the Search this field box, entering the search text in the for this text box and clicking Apply. To print the list right-click anywhere in the list, and on the displayed menu Print. The list can also be saved to an HTML, or inserted in an HTML file in a similar way.

3. To close the window click OK.

Note that this feature is only available in 963 Secure.

3.17.4 Clear the Print Buffer

Alarms that are waiting to be printed are stored in the print buffer. If for some reason 963 has been unable to print out the alarms e.g. printer is faulty you may wish to clear the buffer to prevent lots of alarms being printed.

Caution: this will mean that alarms in the buffer will not be printed.

To clear the print buffer:

1. Log in as described in the ‘Log In’ section of this manual.
   
   Note that if running 963 Secure you must have system administrator access rights.

2. Click or on the Mode menu click Alarms to select the Alarm Viewer.
3. Click the Setup tab.
4. Click Clear print buffer. A dialogue box is displayed asking for confirmation.
5. Click Yes.
3.18 Enter Configuration Mode on Pre IQ3 Controllers

963 allows access to configuration mode on IQ system devices that support configuration mode. Once in this mode, simple adjustments can be made to the strategy. When in configuration mode, 963 is effectively converted into a terminal, all the screen prompts originate from the controller, and all keyboard inputs are sent to the outstation when the ENTER key is pressed. Configuration mode for any IQ system device on the network that supports configuration mode can be accessed using the **Configuration Mode Display**, or from the **Device Viewer**. Buttons can also be set up on pages to provide access to configuration mode for a particular device.

*Note this facility is not available for BACnet devices.*

**To enter configuration mode from the Configuration Mode Display:**

1. Log in as described in the ‘Log In’ section of this manual.
2. Click ![Config](image) or on the **Mode** menu click **Config** to select the **IQ Configuration**.
3. Double-click the Lan containing the device for which configuration mode is required.
4. Click the device. Configuration mode on that device will now be open.

   *Note that the Navigator can be refreshed by right clicking it, and clicking Redraw Network from the displayed menu.*
5. Configuration commands can be typed in on the keyboard. All the configuration information will be displayed in the configuration viewer.

**To enter configuration mode from the Device Viewer:**

1. Log in as described in the ‘Log In’ section of this manual.
2. Click ![Devices](image) or on the **Mode** menu click **Device Viewer** to select the **Device Viewer**.
3. Navigate to the required controller.
4. Right-click the device, and click **IQ Configuration**. Configuration mode on that device will now be open.

   *Note that the Navigator can be refreshed by right clicking it, and clicking Redraw Network from the displayed menu.*
5. Configuration commands can be typed in on the keyboard. All the configuration information will be displayed in the configuration viewer.

**To enter configuration mode using a button:**

1. Log in as described in the ‘Log In’ section of this manual.
2. Display the page containing the button.
3. Click the button or picture that provides access to the device’s configuration mode. Configuration mode on that device will now be open.
4. Configuration commands can be typed in on the keyboard. All the configuration information will be displayed in the configuration viewer.

**To enter configuration mode from a value:**

1. Log in as described in the ‘Log In’ section of this manual.
2. Display a page containing a value from the controller for which configuration mode is required.
3. Right-click the value and click **IQ Configuration**. Configuration mode on that device will now be open.
4. Configuration commands can be typed in on the keyboard. All the configuration information will be displayed in the configuration viewer.

The system prompts the available functions; the upper case character in each prompt is the key to be used to select the function. Most functions also require an additional numeric value. To exit from any page of data and save any changes, made, press X+ENTER. To exit from any page of data and not save any changes made, press Q+ENTER. The commands are as explained in the IQ Configuration Reference Manual (90-1533) for IQ controllers.

If the top page of the configuration prompts (Type Sensor - etc.) is answered with an ‘X’ the outstation will exit the configuration mode. The outstation will continue with its real time control tasks whilst in configuration mode, but will NOT respond to other (non-configuration) communications. It is therefore very important that the user ensures that the outstation has exited the configuration mode BEFORE returning 963 to supervisor mode. Sending more X+ENTER commands will cause no harm, so if in doubt, press X+ENTER before leaving the configuration mode. The Supervisor will return to normal mode when the outstation responds with ‘Exit from Utility’. 963 automatically exits configuration mode if another display is selected.

*Note that if a controller is left in configuration mode, it will time out after 15 minutes.*

If required the text from the configuration session can be inserted into an HTML file as described in the ‘Insert a List into an HTML File’ section of this manual. The text from the configuration file can also be saved to an HTML file as described in the ‘Save a List to HTML’ section of this manual. The text from the configuration session can be printed as described in the ‘Print Text from a Configuration Session’ section of this manual.
3.18.1 Print Text from a Configuration Session

963 can print out graphs to any Windows printer accessible to the PC running 963

To print text from a configuration session:

1. Enter configuration mode on the required device as described in the ‘Enter Configuration Mode on Pre IQ3 Controllers’ section of this manual.
2. Click **Print**. The **Print** dialogue box is displayed.
3. In the **Select Printer** box click the required printer.
4. In the **Number of copies** box enter the number of copies required.
5. Set up the printer as required.
6. Click **Print**.

You can preview what will be printed by clicking **Print Preview**. To setup the printer click **Print set up**.

3.19 Control Scripts

When a script file is running, the **Script Controls** dialogue box shown below is displayed. It enables the running of script files to be enabled/disabled, or scripts that are running to be stopped, or paused. It also displays the number of scripts waiting to be run. It is displayed whenever a script file is running so that the running of the script can be controlled. It can also be displayed at any time from the **963 Information Centre**.

To enable/disable the running of script files:

1. Press **F1** to display the **963 Information Centre**.
2. Click .
3. Click .

To stop script files that are running:

1. Click .

To pause script files that are running:

1. Click .

When script files are paused in this way, they will stop running but can be restarted.
3.20 Insert a List into an HTML File

A list can be inserted into an existing HTML file. This list can be a list of scheduled events, alarms, the Device Viewer, text from a configuration session with a pre IQ3 controller, or time zones for a diary group.

To insert a list into an HTML file:
1. Create the HTML file into which the file is to be inserted. You must include a tag (e.g. `<putmylisthere>`) in the file at the location the list is to be inserted.
2. View the required list as described in the appropriate section of this manual.
3. Right-click anywhere on the list and click Insert into HTML, or for text from a configuration session click Insert into HTML. The Insert HTML dialogue box is displayed.
4. Click Next. The dialogue box changes.
5. Click Select HTML File and navigate the required file HTML, and click it and click Open.
6. If you want to copy the specified file, and create a new file with the inserted data, select the Copy and use HTML file check box. Click Choose new file name and click the new file name in the dialogue box that is displayed, and click Save.
7. Click Next.
8. In the Tag name box enter the name of the tag that specifies where the list is to be inserted.
9. Click Finish.

3.21 Save a List to HTML

A list can be saved to an HTML file. This list can be a list of scheduled events, alarms, the Device Viewer, text from a configuration session with a pre IQ3 controller, or time zones for a diary group.

To save a list to an HTML file:
1. View the required list.
2. Right-click anywhere on the list and on the displayed menu Save to HTML from the list that is displayed, or for text from a configuration session click Saves as HTML. The Save As dialogue box is displayed.
3. In the File name box enter the required file name. You can navigate to a different directory in the normal way.
4. Click Save.
3.22 Setup Exception Templates

Exception templates enable times for exceptions to be predefined e.g. for bank holidays etc which can be used when adding and exceptional. The templates can either define occupation times for a single day (Special Day Templates), or for an entire week (Week Set Templates). This feature allows different occupation times to be set up for each day of the week. Each different Diary Group can contain its own exception templates, allowing the same name to be used within different groups, but defining different occupation times.

3.22.1 Add a Special Day Template

Special Day templates can be added to provide a template of occupation times for single day. It is also possible to import exception templates that have been previously created for other diary groups into a different diary group as described the ‘Import Exception Templates’ section of this manual.

To add a special day template:
1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Diary to select the Diary Display.
3. Click the diary group for which the special day template is to be added.
4. Click the Time Schemes tab.
5. Click Display special days option.
6. Click New. The Diary Week Day Scheme Editor dialogue box is displayed.
7. In the Name box enter the name for the template.
8. Specify the colour used to represent days that use these times by clicking Choose selecting the required colour from the dialogue box that is displayed, and clicking OK.
9. Set up the operating times for the first period of occupancy as required by dragging each end of the bar to specify the times. To add another period click and drag to the right, and then drag each end of the bar to specify the times.

To set occupation for the whole day, right-click the day and click On all day. To set non-occupation for the whole day, right-click the day and click Off all day.

The times can be specified by clicking the required period or right-clicking and clicking Next Period or Last Period. The start and stop times for the period can then be specified by entering them in the Start Hours, Start Minutes, Stop Hours, and Stop Minutes boxes.
10. Once the occupation times are correctly set up, click OK. A dialogue box asking if you want to download the changes now or configure the scheduler to do it later is displayed, click the required option and then click OK.

3.22.2 Add a Week Set Template

Week set templates can be added to provide a template of occupation times for a weekly pattern. It is also possible to import exception templates that have been previously created for other diary groups into a different diary group as described the ‘Import Exception Templates’ section of this manual.

To add a week set template:
1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Diary to select the Diary Display.
3. Click the diary group for which the week set template is to be added.
4. Click the Time Schemes tab.
5. Click Display week sets.
6. Click New. The Diary Week Time Scheme Editor dialogue box is displayed.
7. In the Name box enter the name for the template.
8. Specify the colour used to represent days that use these times by clicking Choose selecting the required colour from the dialogue box that is displayed, and clicking OK.
9. Set up the operating times for the first period of occupancy on Monday as required by dragging each end of the bar to specify the times. To add another period click and drag to the right, and then drag each end of the bar to specify the times.

   To set occupation for the whole day, right-click the day and on the displayed menu On all day. To set non-occupation for the whole day, right-click the day and click Off all day.

   The times can be specified by clicking the required period or and right-clicking and on the displayed menu Next Period or Last Period from the menu. The start and stop times for the period can then be specified by entering them in the Start Hours, Start Minutes, Stop Hours, and Stop Minutes boxes.

10. Repeat step (9) for the rest of the rest of the days in the week.

   Occupation times from one day can be copied and then pasted to another day, or the entire week, by right-clicking the day whose times are to be copied, clicking Copy Day, then right-clicking the day to which the times are to be pasted, and clicking Paste Day. To paste the times to the entire week right-click and click Paste for week, and to paste them just to the working week (Monday to Friday) week right-click and click Paste for working week.

   A single period can be copied by right-clicking it, and clicking Copy, it can then be pasted where required in a similar way to pasting the entire day.

   To set occupation for the entire week, right-click and on the displayed menu On all week. To set non-occupation for the entire week, right-click and on the displayed menu click Off all week.

   Existing times can be loaded as described in the ‘Load Existing Times’ section of this manual, or loaded from a controller as described in the ‘Load Times From a Controller’ section of this manual.

11. Once the occupation times are correctly set up, click OK. A dialogue box asking if you want to download the changes now or configure the scheduler to do it later is displayed, click the required option and then click OK.
3.22.3 Delete a Template

Unused templates can be deleted.

To delete a template:
1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Diary to select the Diary Display.
3. Click the diary group containing the template to be deleted.
4. Click the Time Schemes tab.
5. Click Display special days or Display week sets as required.
6. Click the template that is to be deleted.
7. Click Delete. A dialogue box is displayed asking for confirmation of the deletion.
8. Click Yes.

Note that if you try to delete the template currently supplying the normal occupation times you will be prompted to select another template.

3.22.4 Edit a Template

Once created a template can be edited to adjust the times, change the colour that represents it, or its name.

To edit a template:
1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Diary to select the Diary Display.
3. Click the diary group containing the template to be edited.
4. Click the Time Schemes tab.
5. Click Display special days or Display week sets as required.
6. Click the template that is to be edited.
7. Click Edit.
8. Edit the template as required.
9. Once the template is set up as required click OK.

A single day of a week set template can be edited by selecting the template as described above and then instead of clicking Edit right click the day in the Times for selected scheme list and from the displayed menu click Edit. This will display a dialogue box that enables just that day to be edited. Special day templates can also be edited in this way.

3.22.5 Import Exception Templates

Exception the templates created in one diary group can be imported into another diary group.

To import exception templates:
1. Log in as described in the ‘Log In’ section of this manual.
2. Click or on the Mode menu click Diary to select the Diary Display.
3. Click the diary group for which the exception template is to be imported.
4. Click the Time Schemes tab.
5. Click Display week sets or Display special days depending on whether you want to import a week set template, or a day template.
6. Click Import week sets/special days. The Please select a group from the list dialogue box is displayed.
7. Click the diary group from which exception templates are to be imported.
8. Click OK. **Weekday Sets** dialogue box is displayed.

9. Click the exception templates that are to be imported. To select more than one hold the CTRL key and click the required templates.
10. Click OK. A dialogue box asking for confirmation is displayed.
11. Click Yes.

### 3.22.6 Load Existing Times

Times from another template can be loaded.

**To load existing times from another template:**

1. When the **Diary Week Day Scheme Editor** is displayed, click **Upload**. The **Import Times from another Source** dialogue box is displayed.

2. Click **Import Times from an existing times scheme**.
3. In the *Chosen set* box click the template whose times are to be used from the list.
4. Click **OK**.

### 3.22.7 Load Times From a Controller

Times from a time zone in an IQ controller can be loaded.

**To load times from a controller:**

1. When the **Diary Week Day Scheme Editor** is displayed, click **Load**. The **Import Times from another Source** dialogue box is displayed.
2. Click **Load times from an IQ time zone**.
3. In the **Chosen zone** box, click the time zone whose times are to be used from the list.
4. Click **OK**.

### 3.22.8 View Where Templates are Used

To view where templates are used:

1. Log in as described in the ‘Log In’ section of this manual.
2. Click **Diary** or on the **Mode** menu, click **Diary** to select the **Diary Display**.
3. Click the **Time Schemes** tab.
4. Click the diary group that contains the template.
5. In the **Configured Schemes** area, click the template.
6. Click **Where are these times used?**. A dialogue box is displayed indicating where the templates are used.

### 3.23 View Communications Information

#### 3.23.1 View Communications in the Communications Window

The **Communications Window** is shown below. The communications into the 963 are shown in the top box, and communications out of the 963 in the lower box.

- **Communications Window**
  - **Messages in**
  - **Messages out**

To display the Communications window:

1. Log in as described in the ‘Log In’ section of this manual, and click 🔄.  
   Or
   
   Press F1 to display the **963 Information Centre** and click 🔄.
   
   The **Communications Window** is displayed. The messages coming in or out can be paused enabling you to view the messages by checking the **Pause messages** in or **Pause messages** out check boxes as required.

2. To close the window, click Hide.

#### 3.23.2 View Communications in the Remote Connection Window

The **Remote Connection Window** is shown below. It displays the address, type, and status of each autodialling device on the network, and any direct TCP/IP connection that is being used.

To display the Remote Connection window:

1. Log in as described in the ‘Log In’ section of this manual, and click 🔄.  
   Or
   
   Press F1 to display the **963 Information Centre** and click 🔄.
The **Remote Connection Window** is displayed. It normally displays information about autodialled connections, however, it is possible change what is displayed in the window by clicking **Toggle view** to show information about TCP/IP connections, or a combination of both. The next time the window is displayed it will appear in the selected state. A line can be dropped by clicking the line that is to be dropped, and clicking **Drop selected line**.

2. To close the window click **Hide**.

### 3.23.3 View SMS Activity

The **SMS Activity Window** shown below, it displays the communications activity between 963 and the GSM modem. It indicates the time of the communication, the type, and the message.

To display the Remote Connection window:

1. Log in as described in the ‘Log In’ section of this manual, and click 📦.

Or

On the SMS menu click **Properties**.

The **SMS Management** dialogue box is displayed.

2. Click **View advanced IO**.

The SMS activity can be logged to a text file as described in the ‘Log SMS Activity’ section of the 963 Engineering Manual.

3. To close the window click ❌.

### 3.24 View External Database Records

Information from other 963 databases (e.g. databases from earlier versions of 963) can be viewed if required.

To view external database records:

1. Log in as described in the ‘Log In’ section of this manual.

   *Note that if running 963 Secure you must have system administrator access rights.*

2. On the **Database** menu click **View historic data**. The **Open** dialogue box is displayed.

3. In the **folder list** click the required database file. To store the file in a different location, click the drive, or folder in the **Save in** box that contains the file, and double-click the folders in the **folder list** until the required location is displayed.

   *Note that an archived database file (_sys.mdf) must be selected*

4. Click **Open**. The **VIEWQUERY** dialogue box is displayed.
5. In the box enter the fields from the database that are to be extracted, separate each field with a comma.
6. Click the FROM tab.
7. In the box enter the database table from which the data is to be extracted.
8. Click the WHERE tab.
9. In the box enter the SQL command that is to be used to extract the data.
10. Click OK. The View as Points dialogue box is displayed.

If there are more than 500 entries, <500 and 500> buttons will be enabled to provide access to the others. The list can be filtered by clicking Enable, clicking the field that you want to filter on in the Search this field box, entering the search text in the for this text box and clicking Apply.
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