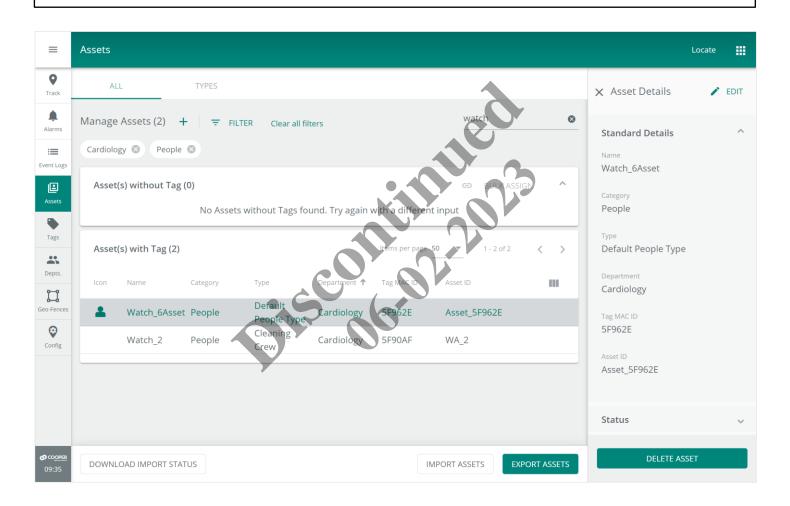
## Locate User Manual

# This document is intended for installers, set-up technicians, and IT professionals of Trellix products.

Important: Engage appropriate network security professionals to ensure all control system hardware and servers are secure for access.

Network security is an important issue. Typically, the IT organization must approve configurations that expose networks to the Internet. Be sure to fully read and understand customer IT Compliance documentation.





## 

Read all the instructions thoroughly before installing this product.

This manual provides information on the installation and operation of Trellix Locate. For proper operation it is important to follow the instructions.

The purpose of this document is to provide sufficient instructions for using the systems.



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## 1 – About this Document

This document describes how to monitor the health of connected devices with the Trellix Locate platform and associated applications.



This document does not cover the initial Trellix Core installation and setup. Please refer to the Trellix Core Quick Start Guide if you are installing the Trellix platform for the first time.

#### 1.1 – Using This Manual

Use the table below to quickly identify the kinds of the tasks you need to perform.

If you are	Then
Installing Trellix for the first time	Refer to the Trellix Core Quick Start Guide and the Trellix Lighting System Configuration Guide
New to Trellix Locate	Begin with Overview and Frellix Locate Login and Authentication, and then follow the Walk-Throughs provided at the beginning of each chapter
Setting up and testing Sensors	See Configuration Management
Creating, editing, and working with Departments	See Department/Management
Enabling, assigning, and editing Tags	See Tag Mahagement
Creating, editing, and working with Assets	See Asset Management
Creating, editing, and working with Geo-Fences	See Geo-Fence Management
Working with Alarms and Events	See Alarm and Event Management
Tracking assets	See Asset Tracking

#### 1.2 - Key Terms

The terms listed below are used in this document.

- Alarm An error notification that requires an action
- Application Programming Interface (API) A set of clearly defined methods of communication between various software components
- Asset A digital representation of a Tag, Object, or People, created when the system is set up and a Tag is assigned
- Bluetooth Low Energy (BLE) A wireless personal area network technology aimed at novel applications in industries such as healthcare, fitness, security, and home entertainment
- **Department** A collection of Assets and the data they generate
- Departments of Responsibility (DOR) The departments assigned to a user to determine which Assets they can access
- Event A notification, such as a cleared alarm or system event, that does not require any action
- Geo-fence A digital representation of a physical space that detects Tags crossing into or out of its boundaries, and generates alarms and events based on those movements
- Internet of Things (IoT) The extension of Internet connectivity into physical devices, enabling them to communicate and interact
  over the Internet for remote monitoring and control
- Media Access Control (MAC) ID A unique identifier for a physical device (Tag)
- Pyroelectric ("Passive") InfraRed (PIR) sensors A sensor that uses Infrared light to detect occupancy in a space
- Received Signal Strength Indication (RSSI) Shows the relative strength of a Tag's signal as detected by a sensor
- Tag A physical BLE device that broadcasts its location and includes properties such as MAC ID and Battery Level
- Trellix Core (TC) A gateway that aggregates Wireless Area Controller device data
- Wireless Area Controller (WAC) An application that coordinates the WaveLinx Mobile App with various WaveLinx devices to provide lighting zone configuration, monitoring, and control (also referred to as "Controller" or "Area Controller")

#### 1.3 - Related Documentation

Document	Description
Trellix Core Quick Start Guide	Covers the initial installation and setup of the Trellix platform
Trellix Lighting System Configuration Guide	Covers the administration and configuration of the Trellix Smart Lighting IoT platform and associated applications
Tag Configuration Manager Manual	Covers the use of the TCM mobile app to configure BLE Tags for use in Trellix Locate
Trellix Locate API Reference Manual	Documents the API calls available to build applications that rely on the published Trellix Locate data
WaveLinx System Network/IT Planning Guide	Covers the planning, design, set up, and configuration of a WaveLinx System
Cyber Infrastructure Security Tips	Tips and advice about common security issues for non-technical computer users

#### 1.4 - What's New in Locate 8.0

Change	Description
Support for more Assets	Trellix Locate now supports up to 5000 Tags
Increased Audit Log coverage	The Audit Log supports a wider variety of user and system activities (Refer to "Downloading Audit Logs" in the Trellix Lighting System Configuration Guide for details)
Improved location accuracy by incorporating occupancy data	It is now possible to combine PIR (Passive InfraRed) occupancy data with existing location sensor data for improved accuracy
Access to telemetry data	Temperature and humidity data can now be enabled and read for sensors that support it
Obtain Tag data without Asset Management	System integrators can save time and effort by obtaining Tag location and telemetry data with no Asset Management steps
	piscon alle

## 2 – Overview

#### 2.1 - Introduction

Trellix Locate is a smart IoT platform that offers real-time location sensing and monitoring. The Trellix platform accelerates insight around your building operations and business processes, unlocking efficiency and enabling more effective decision-making with apps from Trellix and our partners.

The platform manages a *trellis*, or network, of digital sensors, collecting the data gathered by the sensors and analyzing it to provide meaningful insights to users. The Trellix platform hosts the *Trellix Core Services*, *Trellix Locate API Services*, and *Trellix Apps* described in the topics that follow.

#### 2.1.1 - Trellix Core Services

A set of microservices required for fully functional IoT solutions.

#### 2.1.2 - Trellix Locate API Services

A set of REST APIs that enable third-party applications to unlock the value of the data gathered by the Locate system. Refer to the *Trellix Locate API Reference* for details.

#### 2.1.3 - Trellix Admin

The Admin application lets users perform administrative tasks for managing the Trellix Core services, for example:

- Enabling/disabling interfaces
- Creating/editing/deleting users and roles
- Backing up and restoring configuration databases
- Upgrading the platform

#### 2.1.4 – Trellix Locate

The Locate application lets users configure and monitor a wide array of digital sensors, collect, and analyze the data gathered by these sensors, and ultimately gain meaningful insight into their operations.

#### 2.1.5 - Tag Configuration Manager

The Tag Configuration Manager is used to prepare and manage the Tags associated with Trellix Locate.

#### 2.2 - Tags, Assets, and Asset Types

#### 2.2.1 - Tags

Tags are BLE (Bluetooth Low Energy) devices that broadcast their location and perhaps other data, such as temperature or the status of a pushbutton. Each Tag has a unique and fixed identifier (e.g., "A14D85") known as a MAC (Media Access Control) ID. When a Trellix Locate system is set up, a set of Tags are enabled for use at a site.

These Tags are assigned to people, using badges or wristbands for example, or attached to equipment such as electrocardiographs. The location and other data transmitted by the Tags is picked up by sensors, either standalone or embedded in the lighting system, that are installed throughout the site.

#### Νοτε

Trellix Locate supports up to 5000 Tags in the current release.

#### 2.2.2 - Assets

An Asset represents a physical item found on your premises in a Trellix Locate system. Unlike the MAC ID of a Tag, the Asset name and other properties can be configured and changed to suit their location and purpose.

#### **Asset Categories**

Assets are grouped into two categories, *Object* and *People*. These categories permit filtering and enable role-based permissions. For example, you might want a "Device Admin" role for managing equipment like vital signs monitors or patient wristbands, but not surgeons or nurses. To do this, you would grant the **Asset Management** (i.e., Object) permission to the "Device Admin" role, but not the **People Management** permission.

#### 2.2.3 – Asset Types

Trellix Locate supports the concept of Asset Types, which enables additional information on an Asset beyond basic Tag data. Each Asset Type can have a name, icon, category (Object or People), supported Tag types, and additional custom fields. This creates a more rich and meaningful set of location data.

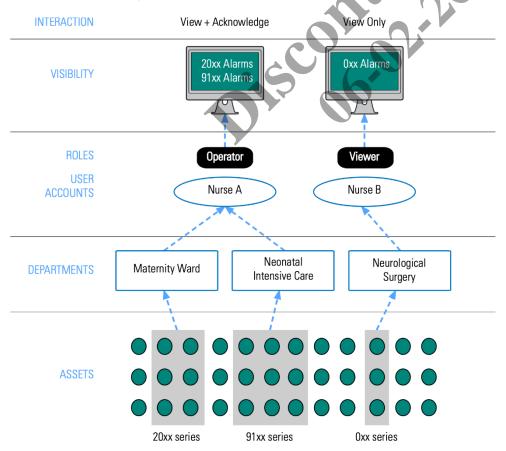
#### 2.3 - System Access - Accounts, Roles, and Departments

The ability to manage user access to Trellix Locate is a key requirement. This is handled with a combination of the features described below.

Feature	Description
User Accounts	A login account with a strong password is required to access any Trellix Locate features or data.
Roles	To simplify the assignment of access permissions, Trellix Locate provides several predefined <b>Roles</b> that confer a set of permissions. A user can be assigned the "Viewer" Role, for example, and automatically gain view-only access to the Track, Alarms, Event Logs, and Departments sections. See <i>Default Accounts, Roles, and Permissions</i> for more information.
Departments	To give organizations further flexibility, Trellix Locate employ the concept of <b>Departments</b> to organize Assets. The set of Departments can be customized, and each asset is assigned to a Department. Users are granted access to one or more Departments according to their needs. These are known as DoR (Departments of Responsibility).
	<b>EXAMPLE</b> A nurse working in the Maternity Ward and Neonatal Intensive Care Unit is assigned those two Departments. When she looks at the Alarms page, only the Assets in those two Departments will appear.

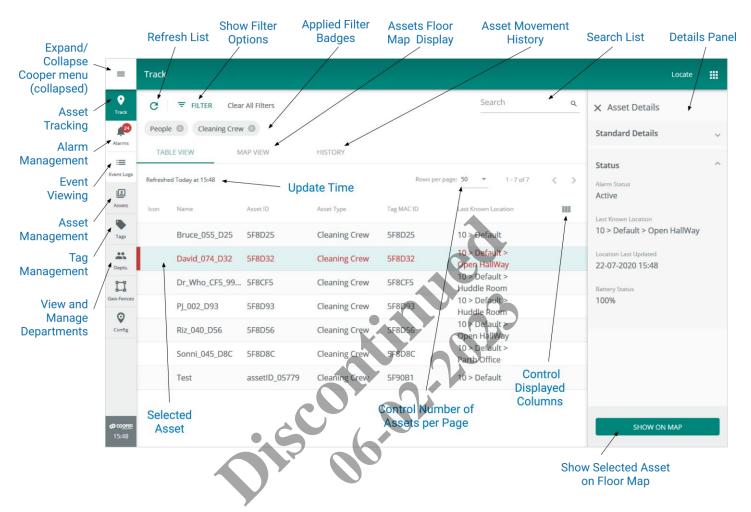
#### 2.3.1 - Visibility and Interaction

The diagram below provides a simple illustration of access management in Trellix Locate. This determines which assets users able to see and how, if at all, they can interact with them.



#### 2.4 - Web Interface

Trellix Locate can be accessed with a desktop or tablet Web browser from anywhere on the Trellix network. A desktop view of the Asset Tracking page is shown below.



#### 2.5 - Key Features

The key facility management features available in Trellix, grouped as they appear in the user interface shown above, are described in the following table.

Feature	Description				
	The app menu ( IIII) lets you switch between the Admin and Locate apps. The System, Users, Clients, and License features appear in the Trellix Admin app, along with Admin Alarms and Events.				
	ADMIN Manage system settings and users for your Cooper applications				
	LOCATE Track your people and equipment				
	LIGHTING     Operate your lighting system				
Track	Track and view Asset location details by Building, Floor, Department, Category, and search for Assets in table floor plan views. View Asset movement history in floor plan view.	or			

Feature	Description
<b>Ļ</b>	Monitor active Asset alarms to assess the health of your system and quickly address issues. Alarm notifications can also be emailed.
Alarms	
	View all system notifications, including past alarms, and perform sequence of events analysis for a better understanding of system behavior.
Event Logs	
Assets	View tagged Assets by Department, Category, and use search to find Assets. Create new Assets and assign them to Tags one at a time or in bulk. View Asset Types by Category and by searching. Edit, create, and delete Asset Types. Import and export Assets.
Tags	View Tags by Type, Status, and search for Tags. Enable discovered Tags. Edit, disable, delete, and export existing Tags.
	View, edit, create, and delete Departments.
Departments	

#### 2.6 - Cooper Menu

The Cooper menu (below left) is collapsed by default and runs vertically along the left edge of every page. It provides access to the toplevel feature sets such as Alarms and Tags. This menu can be expanded (below center) to display other options, including the software version, a link to this manual, and the **Logout** button. The **iii** button appears inside the expanded Cooper menu to provide quick access to the installed Trellix apps (below right).

=			
<b>•</b>	Locate		Locate 💥
Track 194 Alarms	Welcome!		Admin Manage system settings and users for your Cooper applications
Event Logs	Track		<b>Cocate</b> Track your people and equipment
Assets Tags	Alarms	L	Coperate your lighting system
	≔ Event Logs		
Depts.	Settings		
Geo-Fences	🗈 Assets		
Config	Tags		
	Lepartments		
<b>Ф</b> со <u>орег</u> 13:05	LOGOUT © 2020 Cooper Lighting Solutions. All Rights Reserved. 30-06-2020 13:01		LOGOUT © 2020 Cooper Lighting Solutions. All Rights Reserved. 30-06-2020 13:03

#### 2.7 - Trellix Admin: System and User Management

The Admin application lets users perform administrative tasks to manage the Trellix Core services. These include the following:

- Enabling and disabling interfaces
- Creating, editing, and deleting users and roles
- Backing up and restoring the configuration databases
- Upgrading the platform

#### 2.8 – Requirements

Trellix Locate has been tested with **Safari 11+** for iOS devices, **Chrome 53+** for Android devices, and **Chrome 53+** or **Edge** for Windows laptops/tablets.

The necessary Trellix Lighting setup must be complete, including the following:

- Trellix Core configuration is complete
- Tags have been enabled and associated with the appropriate Wireless Area Controllers (WACs)
- The Departments and Asset Types have been configured (if they will be different than the default sets provided)
- The Trellix Date/Time is stable and accurate (Latency and Historical reporting for Locate data depends on accurate time synchronization)

#### 2.9 - Licensing

Trellix Locate is a licensed application. It cannot be used without a valid license, which specifies the maximum number of managed Tags and the expiry date. See *Adding and Updating a Trellix Locate License* for details.

#### 2.9.1 – License Expiry

To help you manage your license and ensure smooth system operation, Trellix Locate will send progressive notifications to users as the license gets closer to expiry. These notifications will begin 15 days ahead of the expiry date and will be displayed to all users at login. The message will read as shown below, and the number of days will count down accordingly:

The application license will expire in 15 days. Please renew your license to ensure continued access to the application.

#### 2.9.2 - License Renewal with Fewer Tags

If you renew your license with a limit that is below the number of Tags on your system, a grace period with be initiated. Like the license expiry situation described in the preceding topic, you will be notified that you only have X Tags licensed and after Y days you will be forced to upgrade the license or disable Tags.

## 3 – Trellix Locate Login and Authentication

Trellix Locate provides a standard set of user accounts, roles, and permissions. Each role has a specific set of permissions, and each user account is assigned to one role. New user accounts, and new roles with custom permissions, can be created when logged into the Trellix Admin app under the System Administrator role.

#### IMPORTANT

Changing the passwords provided for all default accounts is critical for the security of your system. See Changing Default Account Passwords for details. Refer to the Trellix Lighting System Configuration Guide for complete user account setup documentation.

#### 3.1 - Logging into Trellix Locate

Follow the steps below to login to Trellix Locate. See *Default Accounts, Roles, and Permissions* for more information about the default accounts provided with Locate.

#### Νοτε

The first time the Admin account is used to login to Trellix Core, a Setup Wizard guides the user through the initial system configuration. Refer to the Trellix Core Quick Start Guide for step-by-step instructions if you are installing Trellix for the first time.

Step	Action
1	Browse to https:// <ipaddress>, where <ipaddress> is the IP address of the Trellix Core host (192.168.2.100, by default).</ipaddress></ipaddress>
	RESULT
	Trellix
	Username
	Password  LOGIN  FORGOT PASSWORD  By logging in you agree to our End User Licence Agreement (EULA) 04.02.2020
	COOPER Lighting Solutions
2	Enter your <b>Username</b> and <b>Password</b> , and then click <b>Login</b> .
	Notes
	<ul> <li>After 10 failed attempts to log in, you will be locked out for 15 minutes.</li> </ul>

- If you cannot locate your username or password, contact your Facility Manager to reset the password.
- 3 To log out, click  $\equiv$  to expand the Cooper menu, and then click Log Out.

#### 3.2 - Changing Default Account Passwords

Follow the steps below to change the default passwords of the predefined Trellix Locate user accounts.

#### Νοτε

You will need the Trellix Core IP address and a login account with System Administrator permissions (e.g., "Admin") to follow this procedure. Trellix Locate will be hosted on Trellix Core (Enterprise or Virtual).

#### Step Action

1 Click III to display the app menu, then click **Trellix Admin**, and then click **Users**. Click **Filter**, then select the **Trellix Locate** checkbox under Applications, and then click **Apply Filters**.

Ехамр	LE							
=	Users						ADMIN	
Alarms	ALL USERS	ROLES						
Event Logs	Manage Users	+ 🔻 FILTER	Clear all filters		•	Search		۹
System	User Name ↓	Email		Application	Role	e 50 🔻 1 - 50 of 51	<	>
Clients	Admin	N/A		LOCATE	System Administrator			1
	Facman	N/A		LOCATE	Facility Manager			/
	ITAdmin	N/A		LOCATE	IT Adminiștrator			/
	LightingAPI	N/A		LOCATE	Third Party Integration			/

2 Type "Viewer" in the Search field, and then press Enter.

E	XAMPLE	

=	Users	• • •				ADMIN
Alarms	ALL USERS	ROLES				
:=		+ = FILTER Clear all filters			viewer	0
<b>\$</b> System	LOCATE					
22					ltems per page 50 ▼ 1 - 2 of 2	< >
Users	User Name 🔸	Email	Application	Role		
Clients	User1	N/A	LOCATE	Viewer		

3	Click 🖍	in the row for that account.
---	---------	------------------------------

#### **E**XAMPLE

User Name Viewer	Email for No	tifications		8	CHANGE PASSWORD
Role(s)				+	ADD APPLICATION
Application TrelliX Locate	Role Viewer	-	SELECT DEPARTMENT (0)		
Receive Email Not	ifications				×
Application TrelliX Lighting	Role Viewer	~	SELECT AREA OF RESPONSIBILITY (0)		
Receive Email Not					x

4 Click Change Password, and then enter and confirm the new Password value.

#### Τιρ

Green check marks are displayed to reflect the password quality as you are entering and confirming it.

← Change Passv	word		
New Password	Confirm New Password	<b>Q</b>	
Enter a valid password			
<ul> <li>Between 8 and 1</li> </ul>	6 characters without spaces		
<ul> <li>At least 1 numbe</li> </ul>	r		
•	r character ( + 8 <del>, % are not allowed</del> )	6	
•	character ( + & <del>% a</del> re not allowed)	06.	
<ul> <li>At least 1 special</li> </ul>	character ( + 8 <del>.% are not allowed</del> ) case letter	06.	
<ul> <li>At least 1 special</li> <li>At least 1 upper-o</li> </ul>	character ( + 8,45 are not allowed) case letter	0,0,	

5 Click **Save Password** (shown inset above) when complete. Repeat Steps 2-4 for each of the predefined Trellix accounts listed in *Default Accounts, Roles, and Permissions*.

#### 3.3 - Creating a New Account

Follow the steps below to create a new Locate account.

#### Νοτε

You will need the Trellix Core IP address and a login account with System Administrator permissions (e.g., "Admin") to follow this procedure. Trellix Locate will be hosted on Trellix Core (Enterprise or Virtual).

1 Click **III** to display the app menu, then click **Trellix Admin**, and then click **Users**.

#### EXAMPLE

ALL USERS	F	ROLES							
Manage Users	+   =	FILTER	Clear all filters				Search		م
						Items per page 50		<	~
User Name 🕹	Email			Application	Role				
Admin	N/A			LOCATE	System Administrator				-
Facman	N/A			LOCATE	Facility Manager			×	/
ITAdmin	N/A			LOCATE	IT Administrator			×	/
LightingAPI	N/A			LOCATE	Third Party Integration			×	1

2 Click + beside Manage Users. Enter the User Name, Password, and Confirm Password values.

#### ΤιΡ

Green check marks are displayed to reflect the password quality as you are entering and confirming it.

← Add User		
User Name		1 July 1
ViewOps	Email for Notifications.	
Password	Confirm Password	
•••••		
✓ At least 1 number	characters without spaces, haracter ( + & % are not allowed)	
<ul> <li>At least 1 upper-ca</li> </ul>	ase letter	
<ul> <li>At least 1 upper-ca</li> <li>Password Expires</li> </ul>		
	5	CANCEL ASSIGN ROLE(S)

## 3 Click Assign Roles (show inset above). Select Trellix Locate from the Application list, and then select the appropriate Role in the Role list.

Example				
Role(s) for "ViewOps"				
Role(s)				+ ADD APPLICATION
Application TrelliX Locate	Role Operator	Ŧ	SELECT DEPARTMENT	
Receive Email Notifica	tions			×

4 Click **Select Department**. Select the checkbox for each Department that a user with this Role will be able to access. **EXAMPLE** 

#### ← Department for "ViewOps" Select All Departments Anesthesiology & Perioperative Care Cardiology Cardiovas Critical care Default Dermatolo Emergency Medicine Endocrinology Family Me □ Gastroenterology gest Intesive ca Maternity Ward Medicine. Basic and Clinical Immunology 🗌 Neonatal i Neurological Surgery Neurology Obstetrics Oncology Paediatric intensive care unit Primary Ca . . . . . . . . . . . . . . . . ADD TO ROLE CANC

5 Click Add to Role (shown inset above), and then click Create User.

## 4 – Configuration Management

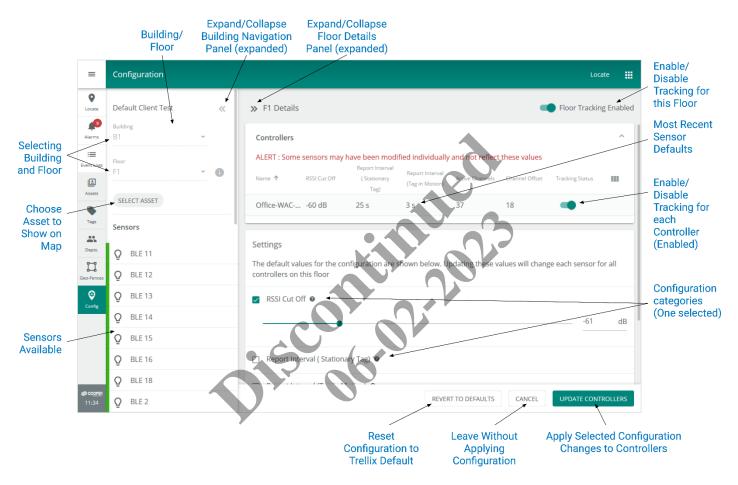
This chapter describes the features available under **Config** in the Cooper menu.

#### Νοτε

You should have at least one Asset created and connected to a Tag before you begin any configuration.

#### 4.1 - Configuration Page

The Configuration page is shown below with a Building and Floor selected.



#### 4.2 – Configuration Features

The Configuration page provides access to range of Trellix Locate settings relating to Floors, Controllers, and sensors. These are described below.

#### 4.2.1 - Trellix Lighting Building and Floor Configuration Required

Trellix Locate uses the Building and Floor configuration provided by Trellix Lighting. This includes the Floor Map images (DXF and SVG/PNG/JPG) that work with fixture and sensor locations. Refer to "Chapter 5 - Building Configuration" in the *Trellix Lighting System Configuration Guide* for more details. For specifics on Floor Maps, see "Section 5.6 - About Floor Maps", and the procedures that follow it.

#### 4.2.2 – Floor Details Settings

The Floor Details page provides access to the following configuration.

Feature	Description
Floor Tracking	You can enable and disable Asset location tracking on a Floor.
Controllers	You can enable and disable Asset location tracking by Controller.

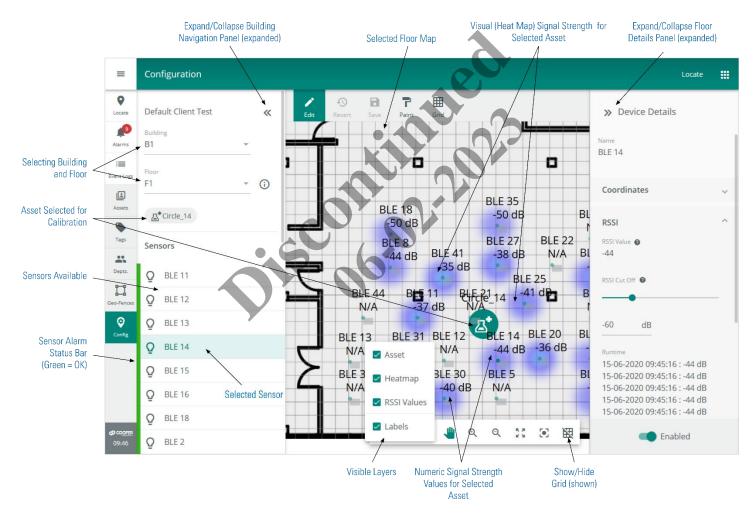
Feature	Description
Floor Settings	You can configure and apply the following sensor settings to one or more Controllers associated with a Floor:
	<ul> <li>RSSI Cut Off: Tile Mount and Fixture Mount (default is -62 dB)</li> </ul>
	<ul> <li>Report Interval: Stationary Tag (default is 7 seconds)</li> </ul>
	<ul> <li>Report Interval: Tag in Motion (default is 2 seconds)</li> </ul>
	Channel: (default is All Channels)
	Channel Offset: Fixture Mount (default is 0 dB)
	Channel Offset: Tile Mount (default is -8 dB)
	Clear PIR Motion Filtering
Trellix Default	Trellix maintains a collection of default sensor settings (e.g., RSSI Cut Off, Channel Offset) that you can apply

#### 4.2.3 – Floor Map

Floor Settings

The Floor Map view in Configuration displays sensor and Asset data, including signal strength in numeric and visual (Heat Map) format.

the Floor Settings. This is done using the Revert to Default feature.



#### 4.2.4 - Device Details

The settings for a sensor are available when it is selected on a Floor Map.



- Choke Point Status
- Map Label Placement
- Map Icon Shape
- Read Temperature & Humidity
- PIR Motion Filtering
- (Device) Enabled/Disabled

#### NOTE

The Choke Point Status and Read Temperature & Humidity features are mutually exclusive. You cannot enable both on a single device.

#### 4.2.5 - RSSI Cut Off

The RSSI Cut Off setting of a sensor determines the minimum signal strength required from a Tag before its location will be reported. For example, if the RSSI value is set to -79 dB then only Tags at or above that level will be reported by that sensor.

#### 4.2.6 - Choke Point Status

A Choke Point is a location where high traffic is likely, such as the entrances to buildings, hallway intersections, and doorways. Enabling Choke Point status will increase the sensor scan rate to provide better accuracy. This will generate more network traffic, however, so the number of sensors with Choke Point enabled should be kept to a minimum (e.g., 5 or less per WAC). An alert will be displayed if you attempt to enable more than 5.

#### 4.2.7 – Read Temperature & Humidity

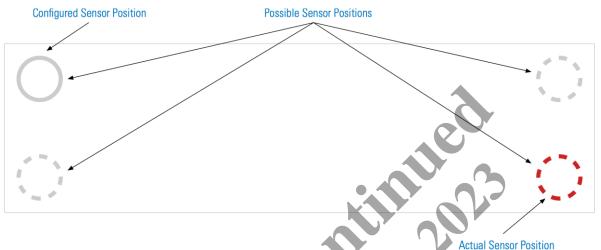
Telemetry data reading can be enabled in devices that support it. The temperature and humidity data provided will be reported as high priority, meaning every 5 seconds. A maximum of 10 devices per WAC may have this feature enabled. An alert will be displayed if you attempt to enable more than 10.

#### 4.2.8 – PIR Motion Filtering

PIR occupancy data can be used to improve room-level accuracy. PIR Motion Filtering is helpful when motion activity occurs just outside a room but is incorrectly interpreted by a BLE sensor as being *inside* the room. PIR filtering works by comparing the room's occupancy data with the BLE sensor data. If the PIR sensor shows the room is unoccupied, the inaccurate BLE reading is filtered out (suppressed). The reading of PIR data must be enabled in Trellix Locate.

#### 4.2.9 - Integrated Sensors - A Special Case

The exact position of BLE sensors is the key to reliable location data. By integrating sensors with light fixtures, the location data available is increased with no added installation cost. The size and placement of light fixtures on a Floor Map is specified in the DXF data files configured in Trellix Lighting. A sensor can be installed in various locations within a fixture, however, and the Trellix Locate configuration must match the actual sensor location to deliver accurate data. The diagram below illustrates possible sensor positions in a fixture, and shows a mismatch between the configured and actual sensor positions.



Trellix Locate lets you edit the Floor Map to align the configured sensor position with its actual position in the fixture.

#### 4.3 - Configuration Management - A Walk-Through

This walk-through follows a fictional user, Sam, as he works with the Configuration page to check the RSSI for a Sensor with respect to a selected Asset.

#### Phase Description

1 Sam navigates to the **Config** page, and then selects a Building and Floor. Trellix loads and displays the Floor Details, and a list of Sensors.

#### Result

≡	Configuration	Locate 🗰
<b>Q</b> Locate	Default Client Test 🛛 🔍	>> F1 Details     Floor Tracking Enabled
Alarms	Building B1 •	Controllers
Event Logs	Floor F1 T	Settings
Assets	SELECT ASSET	The default values for the configuration are shown below. Updating these values will change each sensor for all controllers on this floor
Tags	Sensors	RSSI Cut Off
Depts.	Q BLE 11	<ul> <li>Report Interval (Stationary Tag) </li> </ul>
Geo-Fences	Q         BLE 12	<ul> <li>Report Interval (Tag in Motion) </li> </ul>
<b>Onfig</b>	Q BLE 13	Channel 🛛
	O BLE 14	□ Channel Offset ●

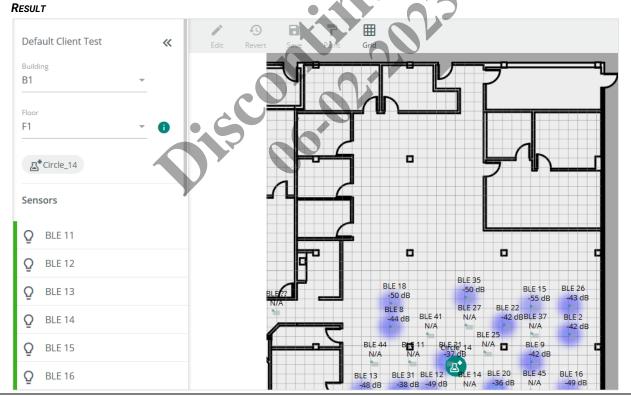
#### Phase Description

```
2 Sam clicks Select Asset to find an Asset for sensor signal strength testing.
```

#### Result

← Select an Asset ♂ Q	» F1 Details
1 - 50 of 54 < 📏	Controllers
Circle_1	Cattinger
<u> 조</u> * Circle_10	Settings The default value
Circle_11	controllers on thi
<u>⊿</u> * Circle_12	RSSI Cut Off
Circle_13	Report Interv
<b>∆</b> * Circle_14	
Circle_15	Report Interv
Circle_16	🗌 Channel 🛛

3 Sam clicks **Circle\_14** in the Asset list, which displays a Floor Map showing the Asset location, and then clicks **Done**.

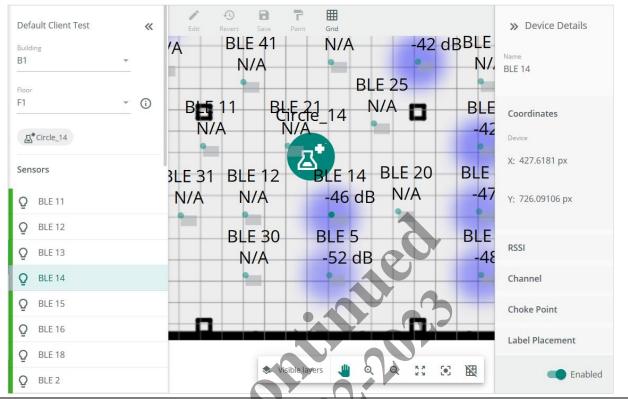


#### Phase Description

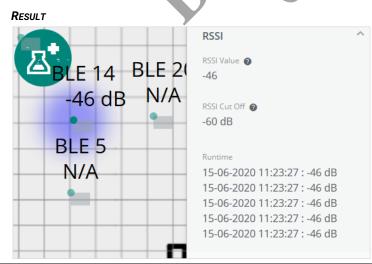
4

```
Sam selects the sensor he is interested in, BLE 14, and then clicks 💽 to focus on it.
```

#### Result



- 5 By reviewing the Floor Map, Sam can see that BLE 14 has an RSSI of -46 dB for the Circle\_14 Asset. With the Heat Map layer enabled, under Visible Layers, they can quickly see how the BLE 14 signal strength for this Asset compares to other nearby sensors (darker purple equals stronger signal).
- 6 To view a short history of the RSSI values over time, Sam expands the RSSI section in the Device Details panel and sees the **Runtime** values list.



#### 4.3.1 - Filters, Sorts, and Searches

There is an Asset search feature in the **Visible layers** menu of the Map Display Tools that searches the **Name** and **MAC ID** fields. The Configuration page does not support any other filtering or sorting.

#### 4.4 – Configuration Procedures

This section includes procedures for using the main Configuration page features.

#### 4.4.1 - Using the Map Viewing Tools on a Floor Map

The Map Viewing Tools, as they appear on a Floor Map, are shown below. The Visible Layers menu options are shown separately.



#### Procedure

The table below describes the use of each Map Viewing tool.

Tool	Action
Asset	Enable or disable the display of the following Floor Map information:
Heatmap	<ul> <li>Asset: Select and display an Asset, or hide Asset display</li> </ul>
RSSI Values	Heatmap: Show or hide visual signal strength map for sensors detecting the selected Asset
✓ Labels	RSSI Values: Show or hide the numeric signal strength values for sensors detecting the selected Asset
Visible Layers	Labels: Show or hide sensor labels
•	Click to center the selected Asset and zoom in on it (available only when an Asset is selected)
Focus	
K 7 K 1	Click to fit the entire Floor Map into the display area
Show Entire Map	
Q Zoom Out	Click to Zoom Out
Q	Click to Zoom In
Zoom In	
	Click to select and drag the map position
Drag	

#### 4.4.2 - Displaying a Sensor on a Floor Map

Follow the steps below to display a sensor on the Configuration page.

Step	Action
1	Click <b>Config</b> , then select a Building, and then select a Floor.
2	Scroll through the <b>Sensors</b> list to find the one you want.
3	Click the desired sensor in the list to display it on the Floor Map with its Device Details panel expanded.
4	Click 🕑 to focus the Floor Map on the selected sensor.

#### 4.4.3 - Displaying an Asset on a Floor Map

Follow the steps below to display an Asset on a Floor Map of the Configuration page.

Step	Action
1	Click Config, then select a Building,
2	Click Select Asset (above the list o
	Example
	← Select an Asset ♂ Q
	1 - 50 of 54 < 🔪
	Circle_1
	즈 Circle_10
	🖿 Circle_11

3 Scroll through the list to locate the Asset you want, or click Q to search for it by name. Select the Asset to display it on the Floor Map, and then click **Done**.

Default Client Test		«	Ec	dit Rev	_	a Ne	Paint	Grid	
Building					-				
B1	~			BLE 35 -50 dB		BLE 15	BLE 26	5	
Floor				BLE 27	BLE 22	-45 dB	-55 d	B	
Floor F1	~	0	BLE 41 N/A	N/A	N/A E	BLE 37 -49 dB	BLE 2		
			-	E 21 N	25 /A	BLE 9			
				I/A	9	N/A			
Watch_11			Wa BLE 12	BLE 14	BLE 20 E	BLE 45	BLE 16		
			-43 dB	-1-34 dB	N/A	N/A	-48 di	в	
Sensors			BLE 30	BLE 5		BLE 33			
			-49 dB	-45 dB		N/A		7	
Q BLE 11					-				

4 To choose a different Asset, click the current Asset button (above the sensors) to display the Asset selection panel.

#### 4.4.4 - Displaying Heat Map and Relative Signal Strength

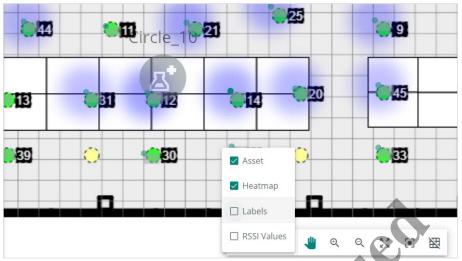
Follow the steps below to display the Heat Map and RSSI data on a Floor Map of the Configuration page.

Step	Action
1	Show the target Asset as described in <i>Displaying an Asset on a Floor Map</i> .
2	Click Visible Layers in the Map Viewing Tools.

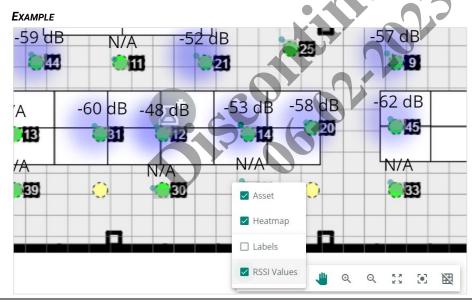
3

To see a visual display of signal strength data for the sensors picking up the current Asset, select the **Heat Map** checkbox.

#### EXAMPLE

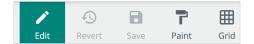


4 To view a numeric display of signal strength data for the sensors picking up the current Asset, select the **RSSI Values** checkbox.



#### 4.4.5 - Using the Map Editing Tools on a Floor Map

The Map Editing Tools, as they appear a Floor Map, are shown below.



#### Procedure

The table below describes the use of each Map Editing tool.

Tool	Action
<b>F</b> dit	Click to begin a sensor location editing session.
<b>F</b> Revert	Click to discard the changes made in the current editing session.
Save	Click to save the changes made in the current editing session.
Paint	Click to copy the selected sensor configuration, and then click on one or more sensors to apply the copied configuration to them.
Grid	Click to show or hide a grid overlay.

#### 4.4.6 - Relocating an Integrated Sensor on a Floor Map

Follow the steps below to change the location of an integrated sensor in the Configuration page.

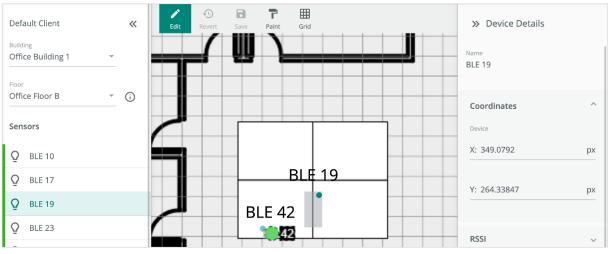
#### Step Action

Step	Action
1	Click <b>Config</b> , then select a Building, and then select a Floor.
2	Scroll through the <b>Sensors</b> list to find the one you want.
3	Click the desired sensor in the list to display it on the Floor Map.

Click Edit in the Map Editing Tools. 4

#### Νοτε

An integrated sensor will appear as a green dot inside a grey light fixture shape.



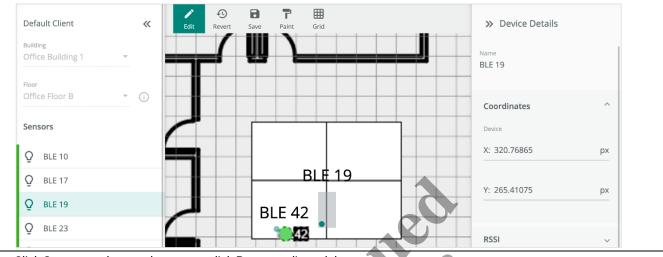
5

Drag the green sensor dot to the desired location in the light fixture.

#### Νοτε

You can also edit the **X** and **Y Coordinates** in the Device Details panel to change the sensor location.

#### EXAMPLE



6 Click Save to apply your changes, or click Revert to discard them.

#### 4.4.7 – Using the Paint Tool to Edit Multiple Sensors Quickly

Follow the steps below to apply the configuration of a selected sensor to one or more other sensors.

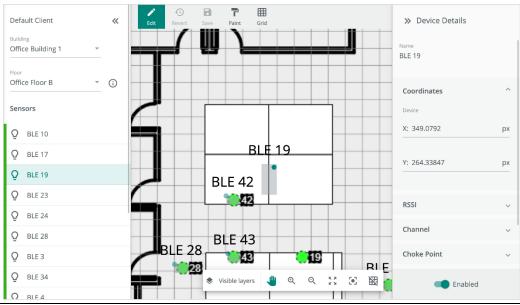
#### Step Action

otop	
1	Click <b>Config</b> , then select a Building, and then select a Floor.
2	Scroll through the <b>Sensors</b> list to find the one you want.
-	

3 Click the desired sensor in the list to display it on the Floor Map. Use the Map Viewing Tools to scale the Floor Map so that all of the sensors you want to modify are visible.

#### Νοτε

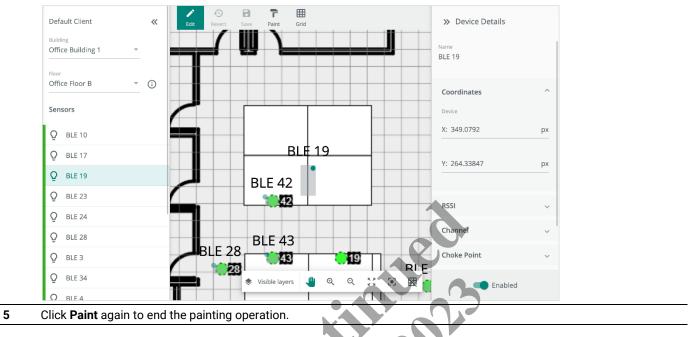
You can edit the configuration of the selected sensor before using the Paint feature.



4

With the sensor still selected, click **Paint** to copy the configuration of the selected sensor. Next, click one or more sensors to apply the copied settings to them.

#### EXAMPLE



### 4.4.8 – Enabling and Disabling Asset Tracking by Floor or Controller

The Details for a selected Floor on the Configuration page are shown below.

Cooper	~	» Office Floo	A Details				•	Floor Trackir	ig Enabled
Building Office Building 1	*	Controllers	.P (	0					^
Floor		ALERT : Some	sensors may l		fied individually	and not refl	ect these values		
Office Floor A	· 0	Name 个	RSSI Cut Off	Report Interval ( Stationary Tag)	Report Interval (Tag in Motion)	Channel	Channel Offset	Tracking Status	ш
Sensors		Office-WAC	-80 dB	7 s	4 s	37	0	-	
Q BLE 19		Office-WAC	-80 dB	7 s	4 s	37	0	-	
Q BLE 23									

#### Procedure

Follow the steps below to enable or disable Asset tracking by Floor or Controller.

Step	Action
1	Click <b>Config</b> , then select a Building, and then select a Floor.
2	To enable or disable tracking for the Floor, click <b>Floor Tracking Enabled</b> in the upper right corner to toggle its current status.
3	To enable or disable tracking for a Controller, click <b>Controllers</b> to show the available Controllers, and then click <b>Tracking</b> <b>Status</b> for the desired Controller.

#### 4.4.9 - Changing the Settings for All Sensors on a Floor

The Sensor Settings for a selected Floor, which appear on the Floor Details page, are shown below.

>> Office Floor A Details	Floor Tr	acking Enabled
Settings The default values for the configuration are shown below. Updating these values will change each sen floor	sor for all controller	s on this
RSSI Cut Off	-80	dB
Report Interval (Stationary Tag) 🛛	7	S
Report Interval (Tag in Motion) @	- 4	s
Channel		3
revert #obseaure	ANCEL	CONTROLLERS

#### Procedure

Follow the steps below to modify one or more configuration values for all sensors on a Floor.

#### Νοτε

The Settings form is automatically loaded with the Trellix default values for each setting.

Step	Action
1	Click <b>Config</b> , then select a Building, and then select a Floor.
2	To change the <b>RSSI Cut Off</b> , select the checkbox beside it, and then either drag the slider or edit the <b>dB</b> value directly.
3	To change the <b>Report Interval (Stationary Tag)</b> , select the checkbox beside it, and then either drag the slider or edit the <b>s</b> (seconds) value directly.
4	To change the <b>Report Interval (Tag in Motion)</b> , select the checkbox beside it, and then either drag the slider or edit the <b>s</b> (seconds) value directly.
5	To change the <b>Channel</b> , select a different value from the list.
6	To Clear PIR Motion Filtering, select the the checkbox beside it.
7	<ul> <li>To change the settings you modified back to their Trellix default values, click Revert to Defaults.</li> <li>To exit without making any changes, click Cancel.</li> <li>To apply your changes, click Update Controllers.</li> </ul>

#### 4.4.10 - Reverting All Sensor Settings on a Floor to Trellix Defaults

Follow the steps below to apply one or more of the Trellix default settings to all sensors on a Floor.

Step	Action
1	Click <b>Config</b> , then select a Building, and then select a Floor.
2	Select the checkbox for each Setting you want to set to its Trellix default value.
3	Click <b>Update Controllers</b> at the bottom of the page.

#### 4.4.11 - Enabling, Disabling, and Changing the Individual Sensor Settings

The sensor settings appear in the Details panel when a sensor is selected.

	» Device Details	
itegrated Sensor 7 N/A	Coordinates	~
rated Sensor 4 N/A	RSSI	~
Integrated Sensor 28	Channel	~
N/A ntegrated Sensor 29 N/A	Choke Point	~
egrated Sensor 18 N/A	Label Placement	~
tegrated Sensor 19 N/A	Shape	~
rgrated Sensor 21 N/A grated Sensor 22 N/A grated Sensor 23 N/A grated Sensor 24	Read Temperature & Humidity Read Temperature & Humidity @ Enabled	^
N/A grated Sensor 25 N/A	PIR Motion Filtering	~
	Enabled	

#### Procedure

Follow the steps below to enable, disable, or modify sensor settings.

#### IMPORTANT

Cooper Lighting Solutions recommends that you do not change the Channel or Choke Point settings unless you fully understand the potential impact of a change.

Step	Action
1	Click <b>Config</b> , then select a Building, and then select a Floor.
2	Click a sensor in the Sensors list for the selected Floor to display the Details panel.
3	To change the sensor location on the Floor Map:
	1. Click <b>Coordinates</b> to expand that section.
	2. Edit the <b>X</b> and <b>Y</b> values, or drag it on the Floor Map.

Coordinates ^				
Device				
X: 648.3717	рх			
Y: 536.9233	рх			

4

- To change sensor signal strength settings:
  - 1. Click **RSSI** to expand that section.
  - 2. Drag the RSSI Cut Off slider or enter the dB value directly.

#### EXAMPLE

RSSI	^
RSSI Value 🕖 N/A	
RSSI Cut Off 🔞	
-	
-79	dB

- 5 To change the sensor communication channel (not recommended unless you fully understand the potential impact):
  - 1. Click **Channel** to expand that section
  - 2. Drag the Channel Offset slider or edit the dB value directly.

#### EXAMPLE

Channel	^
Channel Offset 👔	
•	
0	dB

**6** To enable or disable the sensor as a choke point (not recommended unless you fully understand the potential impact):

tiens.

- 1. Click **Choke Point** to expand that section.
- 2. Toggle the Choke Point button to the desired state.

#### EXAMPLE

Choke Point				
Choke Point 🔞				
Disabled				

- 7 To change where the sensor label appears on the Floor Map:
  - 1. Click Label Settings to expand that section.
  - 2. Click the desired placement of the label (with respect to the sensor icon).

Label Placement					
🔘 Тор	O Middle				
O Bottom					

. .

\_

Step	Action							
8	To change the shape of the sensor icon on the Floor Map: 1. Click <b>Shape</b> to expand that section.							
	2. Click the desired s							
	Example							
	Shape	^						
	Endpoint Sensor	1						
	Rect Test							
	Light Fixtures							
	Sensors							
	testShape							
	Keypad							
	<ol> <li>Click Rectangle or Circle.</li> <li>Edit the Width and Height.</li> <li>Click Update to apply the shape settings.</li> </ol>							
	Edit Default Shape	sensor shape settings: e shape. Circle. Height. ply the shape settings.						
	Endpoint Sensor Minimum 2 and Maximum 16 c							
	Rectangle     Circ	le						
	Width         Height           0.00868         ft         0.00868							
	Minimum 0.0008680556 Ft and 0.868056 Ft	Maximum						
	C	ANCEL						

- **10** To enable or disable the sensor for Temperature and Humidity reading:
  - 1. Click **Read Temperature & Humidity** to expand that section.
  - 2. Toggle the **Enabled** button to the desired state.

Read Temperature & Humidity	^
Read Temperature & Humidity 🛛 🖉	
Called Enabled	

Step	Action
11	To enable or disable the PIR Motion Filtering: 1. Click <b>PIR Motion Filtering</b> to expand that section. 2. Toggle the <b>Enabled</b> button to the desired state.
	Example
	PIR Motion Filtering
	PIR Motion Filtering
	Enabled
12	To enable or disable the sensor, toggle the <b>Enabled</b> button at the bottom of the Device Details panel to the desired state.
	Example
	Label Placement
	Testing
	Table Shape ~
	Q Q D Enabled

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## 5 – Department Management

This chapter describes the features available under **Depts** in the Cooper menu.

#### 5.1 - The Departments Page

The Departments page is shown below with a filtered list of Departments. A search string has been applied ("neuro") and the Neurology Departments has been selected, causing the Details panel to appear.

		Create New Department	Selected Department		Search Departme			
≡	Departments					LOCATE		
<b>O</b> Track	+ ADD DEPA	ARTMENT		neuro		🗙 Department Details 🖌	EDIT	
Alarms	Neurological S	Surgery	Neurolog	EV		Name Neurology		Edit Selected Department
Event Logs					00	Users Locateman Public		Department ⁄ Details Panel
Tags								
Depts.								
Geo-Fences								
Config			•. 6		•			
<b>ഗ</b> <u>coore</u> 14:15			DI.	00		MANAGE USERS DELETE DEPARTMENT		
						Delete Sele Departm		

#### 5.2 - Filtering and Searching

When viewing the Departments page, you can use a search to limit the Departments shown.

#### 5.3 - Department Management - A Walk-Through

This walk-through follows a fictional user, Josef, as he works with the Depts page to create and edit Departments.

#### Phase Description

1 Josef navigates to the Depts page and sees the grid of configured Departments.

RESULT	-				
≡	Departments			LOCATE	
<b>Q</b> Track	+ ADD DEPARTMENT		Search		٩
Alarms	Anesthesiology & Perioperative Care	Cardiology			
Event Logs	Cardiovascular intensive care unit	Critical care			
Tags	Default	Dermatology			
Depts.	Emergency Medicine	Endocrinology	7		

2 The first change Josef wants to make is to change the name of the Neurology Department, so he searches for "neuro". This reduces the grid to just two items, and he clicks **Neurology** to open the Details panel.

RESULT		
+ ADD DEPARTMENT	neuro O	X Department Details 🖌 EDIT
Neurological Surgery	Neurology	Name Neurology
		<sup>Users</sup> Locateman Public Saurav
		Dani Jobelle Admin Manu

.

3 Josef clicks **Edit** to continue, and then changes the Department name to "Neurology and Brain Injury".

#### RESULT

+ ADD DEPARTMENT		neuro	0	× Edit Department Details
Neurological Surgery	Neurology			Name Neurology and Brain Injury
				Max 64 characters 26/6
				CANCEL
				SAVE

4 Josef c	licks <b>Save</b> to apply his	change and sees the	hat the Department na	me has been modified.
-----------	--------------------------------	---------------------	-----------------------	-----------------------

#### RESULT

+ ADD DEPARTMENT		neuro 😵	🗙 Department Details 🌈 EDIT
Neurological Surgery	Neurology and Brain Injury		Name Neurology and Brain Injury
			Users
			Locateman
			Public
			Saurav

5 Next, Josef needs to add a new Department. He clicks **+ Add Department**, and then enters "Acupuncture" as the Department name.

#### RESULT

+ ADD DEPARTMENT		Search	۹
Acupuncture 😵 🖬	gest		
Dermatology	Emergency Medicine		
Family Medicine. Geriatric Medicine & Gerontol	Medicine. Basic and Clinical Immunology		

#### 6 Josef clicks 🖬 to create the new Department, which then appears in the grid.

Result		
+ ADD DEPARTMENT		Search Q
Acupuncture	gest	
Emergency Medicine	Family Medicine. Geriatric Medicine & Gerontol	
Madicina Dasis and Clinical Immunal	Anu Neurological Currant	

7 Josef clicks = to expand the Cooper menu, and clicks **Logout** to end his Trellix Locate session.

#### 5.4 – Department Procedures

This section includes procedures for using the main features of the Departments page.

#### 5.4.1 – Editing a Department Name

Follow the steps below to edit the name of a Department.

# Step Action 1 Click Depts, then select a Department to display the Details panel. 2 Click Edit, and then edit the Name field. 3 Click Save.

#### 5.4.2 - Adding a New Department

Follow the steps below to add a new Department.

Step	Action
1	Click Depts, and then click + Add Department.
2	Edit the Department name, and then click 🖬 to create the new Department, or click 😵 to cancel.

#### 5.4.3 - Assigning Departments of Responsibility

As described in *System Access - Accounts, Roles, and Departments*, the Assets visible to a user depend in part on the Departments assigned to them. Follow the steps below to view and modify the Departments assigned to a user.

#### Νοτε

You must have System Administrator privileges to perform this procedure.

#### Step Action

1 Click III to display the app menu, then click **Trellix Admin**, and then click **Users**. Click **Filter**, then select the **Trellix Locate** checkbox under Applications, and then click **Apply Filters**.

=	Users					^	DMIN	
erms 1	ALL USERS	ROLES						
≡ nt Logs ¢	Manage Users All Roles 🚳 🛛 L	+ ₹ Filter : Lighting Ø	Clear all filters		3	Search		c
stem	User Name 个	Email	(1)100 (1)	Role	Items per page 50 👻	1 - 50 of 53	<	>
ents	Admin	N/A	LIGHTING	System Administrator				
	Facman	N/A	LIGHTING	Facility Manager			×	/
	ITAdmin	N/A	LIGHTING	T Administrator			×	/

2 Click 🖍 beside the user account you want to access.

#### EXAMPLE

User Name Viewer	Email for Noti	fications		â	CHANGE PASSWORD
Role(s)	Role			+	ADD APPLICATION
TrelliX Locate		~	SELECT DEPARTMENT (0)		X

3 Click Select Department, and then select all Departments that this user will be able to view.

#### **EXAMPLE**

Select All Departments		
Anesthesiology & Perioperative Care	✓ Cardiology	Cardiovas
Critical care	✓ Default	Dermatole
Emergency Medicine	Endocrinology	Family Me
Gastroenterology	□ gest	□ Intesive ca
Maternity Ward	Medicine. Basic and Clinical Immunology	🗌 Neonatal i
Neurological Surgery	✓ Neurology	Obstetrics
Oncology	Paediatric intensive care unit     CANCEL     ADD TO	ROLE

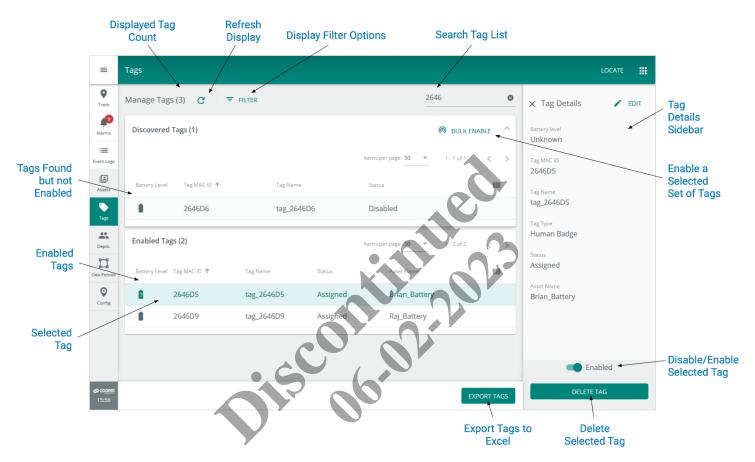
Click Add to Role (shown inset above), and then click Update. 4

# 6 – Tag Management

This chapter describes the features available under Tags in the Cooper menu.

#### 6.1 – The Tags Page

The Tags page is shown below. A search string has been applied ("2646") and one of the matching Tags has been selected, causing the Details panel to appear.



#### 6.2 - Departments and Asset Visibility

When viewing the Tags page, the displayed Tags assigned to Assets are always limited to those in Departments that are assigned to you. Tag display assumes the Tags have been set up using the Tag Configuration App, are powered on, and are in the vicinity of sensors with location enabled.

#### 6.3 - Tag Management - A Walk-Through

This walk-through follows a fictional user, Lena, as she works with the Tags page to enable new Tags that have been discovered,

#### Phase Description

1

Lena navigates to the Tags page and sees the list of 307 Tags, divided into 176 **Enabled Tags** and 131 **Discovered Tags** (not enabled).

≡	Tags						Locate	
<b>Q</b> Track	Manage Tags (307) C	₹ FILTER				Search		٩
Alarms	Discovered Tags (131)					O BUL	K ENABLE	~
Event Logs	Enabled Tags (176)				ltems per pa	ge <b>50 v</b> 1 - 50 of 170	б 🔇	>
Assets	Battery Level Tag MAC ID 🕇	Tag Name	Last Connected Date and Time	Status	Tag Model	Asset Name		
	5F8CF3	tag_5F8CF3	11-12-2019 16:50	Assigned	67	Sonni_050_CF3_888	Î /	,
Tags	5F8CF5	tag_5F8CF5	11-12-2019 17:15	Assigned	c7 /	Dr_Who_CF5_9999	<b>x</b>	,
Depts.	5F8CF8	tag_5F8CF8	1 <mark>1-12-2019</mark> 16:51	Assigned	(7)	Sonni_046_CF8	🗵 🧪	

2 Lena has been given a list of **Discovered Tags** to enable, so she clicks **Bulk Enable**.

SULT			6.2
← Enable Multiple Tags			<u>o</u>
STEP 1: Select Tags C		Search q	STEP 2: Enter Parameters
0 of 131 selected	ltems p	cr (page 50 1 - 50 of 131 >	Туре 👻
· ·	MACID	Name	
	286CA8	tag_286CA8	
	286CA9	tag_286CA9	
	286CAA	tag_286CAA	
	286CAB	tag_286CAB	
	286CE5	tag_286CE5	
	286CE6	tag_286CE6	
	286CE9	tag_286CE9	
	286CEA	tag_286CEA	
			CANCEL ENABLE TAGS

3 Lena selects all but one of the Tags, and then she selects Asset Tag 1yr for the Type (of Tag).

#### RESULT

TEP 1: Select Tags 🛛 🤁		5F8D 😵	STEP 2: Enter Parameters
of 131 selected		ltems per page 50 ▼ 1 - 4 of 4 < >	Type Asset Tag 1yr
	MAC ID	Name	
I	5F8D70	tag_5F8D70	
I	5F8D78	tag_5F8D78	
1	5F8D89	tag_5F8D89	
1	5F8D9F	tag_5F8D9F	CANCEL ENABLE TAGS

Lena clicks **Enable Tags** (shown inset above), and the selected Tags are enabled. 4

#### RESULT

ESULT						
Nanage Tags (307) C	₹ FILTER				Search	c
Discovered Tags (127)					🔊 BUL	K ENABLE 🗸 🗸
Enabled Tags (180)				Items p	eer page 50 🔻 1 - 50 of 18	• < >
Battery Level Tag MAC ID ↑	Tag Name	Last Connected Date	Status	Tag Model	Asset Name	
5F8CF3	tag_5F8CF3	11-12-2019 16:50	Assigned	С7	Sonni_050_CF3_888	🗵 🖌
5F8CF5	tag_5F8CF5	11-12-2019 17:15	Assigned	C7	Dr_Who_CF5_9999	ً ∕
5F8CF8	tag_5F8CF8	11-12-2019 16:51	Assigned	C7	Sonni_046_CF8	ً ∕
? 5F8CFD	tag_5F8CFD	26-09-2019 14:47	Assigned	C7	Automation	8
5F8D0F	tag_5F8D0F	11-12-2019 17:12	Assigned	C7	Sonni_043_D0F	8
5F8D1B	tag_5F8D1B	12-12-2019 11:17	Available	C7	N/A	8 🖌
5F8D1C	tag_5F8D1C	12-12-2019 11:17	Assigned	C7	Chirag_068_D1C	ً ∕
5F8D1D	tag_5F8D1D	12-12-2019 11:17	Assigned	C7	Kishore_069_D1D	ā 🖍
5F8D1E	tag 5F8D1E	12-12-2019 11:17	Assigned	C7	Demeng 070 D1E	<b>R</b>
					l	EXPORT TAGS

5 A third-party request has been approved to receive a complete list of the Tags for application development. Lena clicks **Export Tags** on the Tags page, which generates a file named "ExportTags\_20190929073224.xlsx". Lena chooses to open the exported file in Excel when prompted and reviews the spreadsheet content before sending it to the third-party developers.

#### RESULT

AutoSave ● 여러 맘 ♡ ~ 근 ~ ≂ ExportTags_20	200722012946.	xlsx - Excel 🔎 Search			Ken Dow 🏼 🌛	æ	- 🗆 >
File Home Insert Draw Page Layout	Formulas	Data Review View H	lelp			년 Share	e  ☐ Comments
A1 • : X 🗸 $f_{\mathbf{x}}$ Tagid							
A	в						
1 Tagld	MAC ID	Tag Name	Asset Name	Туре			
2 ce5580c9-bb96-44e9-8c5c-093d93572f20	5F9002	tag_5F9002					
3 2b65e337-6ebd-4977-aaab-fa2169c605f9	5F8D4B	tag_5F8D4B	Sonni_030_D4B	Human Badge			
4 1dfa6fc4-f1ef-489d-9720-0b39d9c516f9	5F8D4A	tag_5F8D4A	Sonni_029_D4A	Human Badge			
5 b9bbbd8b-79d0-4695-86aa-e9dec4b52541	5F8DA1	tag_5F8DA1	Huddle_016_DA1	Human Badge			
6 36ba764c-0fa7-4428-a765-2454feba0fd8	5F8D95	tag_5F8D95	PJ_004_D95	Human Badge			
7 83645851-7802-45be-801b-8e8ddacde8a9	5F8D43	tag_5F8D43	Sonni_022_D43	Human Badge			
8 1639266f-bb2b-4a5c-8f07-bd78cfa0dfd0	5F8DA3	tag_5F8DA3	Q_Huddle_018_DA3_888	Human Badge			
9 64561770-19c7-49ef-9168-4a4754008e86	5F8D4E	tag_5F8D4E	Riz_033_D4E	Human Badge			
10 85594813-ec65-4474-94e5-650d4952abb3	5F8D8D	tag_5F8D8D	Sonni_047_D8D	Asset Tag 5yr			
11 5cca9326-b692-40b6-af59-515d6e40e19a	5F8D33	tag_5F8D33	Tony_075_D33	Asset Tag 5yr			

6 Lena has another request to correct the name of an unassigned Tag that was set up incorrectly. She searches for the MAC ID provided ("5F8CF3") and quickly finds the Tag. Lena notes that the Tag Name does not correspond to the Tag MAC ID as required by site policy.

₹ FILTER			5f8cf3	
			(0)	BULK ENABLE V
		2	Items per page 50 • 1	-1 of 1 < 📏
Tag Name	Last Connected Dats and Time	Tag Model	Asset Name	
tag_5F8DD7	11-12-2019 16:50 Assigned	N/A	Sonni_050_CF3_8	88 🖻 🖍
	Tag Name	Tag Name Last CorrecteeDate Status and line	Tag Name Last Confected Data and Time Status Tag Model	<ul> <li>► FILTER</li> <li>(?)</li> <li>Tag Name</li> <li>Last Conference Dates and Sime</li> <li>Status</li> <li>Tag Model</li> <li>Asset Name</li> </ul>

7 To edit the Tag, Lena clicks X, then edits the Name to "tag\_5F8CF3" to align with the MAC ID.

#### RESULT

AC ID	Name	Туре	
F8CF3	tag_5F8CF3	Asset Tag 5yr 🔹	
	Max 64 characters 1	//64	
			CANCEL SAV

8 Lena clicks Save (shown inset above) and then searches the Tags again to confirm the change.

#### RESULT

Discovered	Tags (0)					log Bul	_K ENABLE 🗸
Enabled Ta	gs (1)				lte	ems per page 50 🔻 1 - 1 of	f1 < >
Battery Level	Tag MAC ID 🏠	Tag Name	Last Connected Date and Time	Status	Tag Model	Asset Name	ш
?	5F8CF3	tag_5F8CF3	11-12-2019 16:50	Assigned	N/A	Sonni_050_CF3_888	☑ ∕

9 Lena clicks  $\equiv$  to expand the Cooper menu, and clicks **Logout** to end her Trellix Locate session.

#### 6.4 - Tag Procedures

This section includes procedures for using the main features of the Tags page.

#### 6.4.1 - Filters, Sorts, and Searches

The features that apply specifically to the Tags page are listed and described below.

Feature	Description
Filtering	The Asset Management filters support the standard Building, Floor, Department, Category (Object or People), and Category Type filters.
Sorting	<ul> <li>The Discovered Tags list supports sorting by Tag MAC ID and Tag Name.</li> <li>The Enabled Tags list supports searching of the Name, Asset ID, Asset Type, and Tag MAC ID fields.</li> </ul>
Simultaneous Search	A search returns results for both the <b>Discovered Tags</b> and <b>Enabled Tags</b> lists.

#### 6.4.2 – Editing a Tag

Follow the steps below to edit the Tag data.

Step	Action
1	Click Tags, and then apply the necessary combination of filters and search to find the Tag you want edit.
2	Click 🖍 for the Tag.
	Example
	← Edit Tag

MAC ID A10DF5	Name tag_A10DF5	<sup>Type</sup> Human Badge ▼	
	Max 64 characters	10/64	

#### 6.4.3 – Enabling and Disabling a Tag

Follow the steps below to enable or disable a Tag.

#### Νοτε

The number of Tags that can be enabled is limited by your license. You will be prompted if you try to exceed that limit.

Step	Action
1	Click <b>Tags</b> , and then apply the necessary combination of filters and search to find the Tag you want edit.
2	Click the Tag row to display the Tag Details panel, and then toggle the <b>Enabled</b> button to the desired state.

#### 6.4.4 - Bulk Enabling a Set of Tags

Follow the steps below to bulk enable a set of Tags.

Step	Action
1	Click <b>Tags</b> , and then click <b>Bulk Enable</b> .
	<b>Noтe</b> The <b>Bulk Enable</b> button will be unavailable if there are no Discovered Tags.
2	Apply any filters or search needed to limit the number of Discovered Tags displayed, and then select the checkbox for

each Tag you want to enable. Select the Type that will apply to all the Tags you are about to enable.

EXAMPLE ← Enable Multiple Tags meters STEP 1: Select Tags C A A A MAC ID  $\checkmark$ 2646D6 2646D5  $\checkmark$  $\checkmark$ 2646D9  $\checkmark$ 264730 tag\_26473D  $\checkmark$ 26473E tag\_26473E CANCEL ENABLE TAG  $\checkmark$ 26473F tag\_26473F Click Enable Tags (shown inset above).

#### 6.4.5 – Exporting Tag Data

3

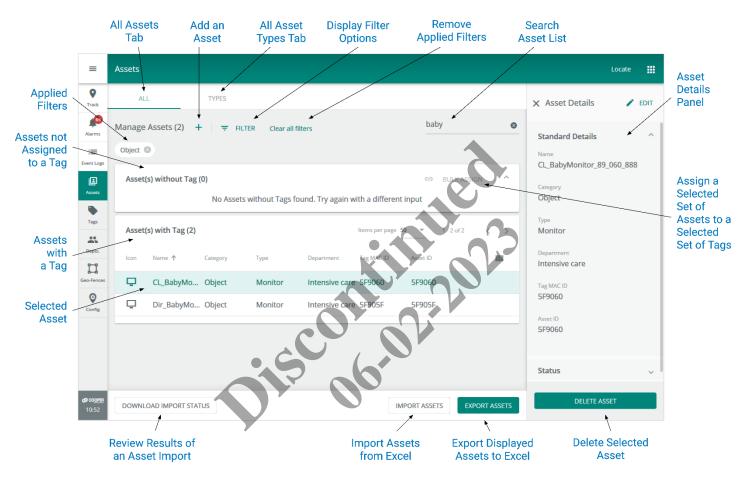
To export Tag data to an Excel file, click **Tags**, then click **Export Tags**, and then save the file.

# 7 – Asset Management

This chapter describes the features available under Assets in the Cooper menu.

#### 7.1 – The Assets Page

The All tab of the Assets page is shown below with a filtered list of Assets. The list is divided into two groups: Assets that have Tags assigned; and Assets that do not. A search string has been applied ("Office") and one of the listed Assets has been selected, causing the Asset Details panel to appear.



#### 7.2 - Departments and Asset Visibility

When viewing the Assets page, the Assets shown are always limited to those in Departments that are assigned to you. In addition, you can apply a combination of filters and a search to narrow down the displayed Assets.

#### 7.3 – Asset Management – A Walk-Through

This walk-through follows a fictional user, Sam, as he works with the Assets page to edit an existing Asset, create a new Asset, and transfer a Tag from an Asset that no longer needs to be tracked.

#### Phase Description

1 Sam navigates to the Assets page and sees the list of Assets, grouped according to whether they have Tags assigned or not.

RESULT	Г								
≡	Assets							LOCAT	E 🔢
<b>Q</b> Track	AL	L TYP	PES						
) Alarms	Manage	Assets (100) +	₹ FILTER				Search		۹
Event Logs	Asset	(s) without Tag (0)					t BULK	ASSIGN	~
L Assets	Asset	(s) with Tag (100)				Items	per page 50 • 1 - 50 of 1	00 <	>
Tags	lcon	Name 🕇	Category	Туре	Department	Tag MAC ID	Asset ID		
	"	Akhil_Battery	Object	Heat Therapy Units	Dermatology	264743	Battery_18	X	
Depts.	≛*	Akhil_Button	Object	End Tidal CO2	Endocrinology	A10D8B	Button_18	×	/
	អ	Akhil_Small	People	Doctors/Physician (E R doctors, surgeon		e A14CCB	Small_18	Ì	/

2 To limit the number of assets shown, Sam clicks **Filters**, then selects **People** from the Category list, and then clicks the **Therapist** checkbox.

LTER partmen I Depai	rtments		Category People	<u></u>			×
] All T	ypes tors/Physician (ER doo	ctors, 🗅 Me	bies dical Assistants	<ul> <li>Cleaning Crew</li> <li>Medical Techn</li> </ul>	ologist, Medical L	<ul> <li>Default Peop</li> <li>My Asset Type</li> </ul>	
	ses(CRNA, RN, LPN/LV rapist (Physical Thera		ients	Pharmacists		🔲 Techs (Radio	ology Tech, Ultraso
Icon	Name T	Lategory	Туре	Department	Tag MACID	Asset IU	APPLY FILTER(S)
ទ	Akhil_Small	People	Doctors/Physician (E R doctors, surgeon	Emergency Medicine	A14CCB	Small_18	Î /
		People	Patients	Neonatal intensive	A10DBF	Button 7	ā /
	Andrew_Button	reopie	rationes	care unit			

3 Sam clicks Apply Filters but finds there are still too many matching Assets, so he enters "susan" in the Search box and clicks Q. The Assets with Tag list now only shows those containing "susan" in the Name, Tag MAC ID, or Asset ID fields. Sam now sees the "Susan\_Small" asset he was trying to find.

#### RESULT

	L T	YPES						
inage	e Assets (2) 🕂	₹ FILTER C	lear all filters			S	usan	
eople	Therapist (Physical	Therapist, Radiation	Therapist) 🗵					
Asset	(s) without Tag (0)					G	Ð BULK ASSIGN	^
			No results found. Tr	y again with a diffe	erent input			
Asset	(s) with Tag (2)				lter	ms per page 50 💌	1 - 2 of 2	< >
Asset(	(s) with Tag (2) Name ↑	Category	Туре	Department	Iter	ms per page 50 💌	1 - 2 of 2	< >
		Category People	<sup>Туре</sup> Therapist (Physical T herapist,	•			1-2 of 2	· ·

4 To rename this asset, Sam clicks 🖍. When the editing form appears, he changes the Name to "Kara\_Small" and selects Oncology in the Departments list.

Result			
← Edit an Asset			
Name	Department	Asset ID	
Kara_Small	Oncology	- Small_4	
Max 64 characters	10/64	Max 64 characters	7/64
Category	Туре		
People	Therapist (Physical Therapist, Radia	tion 👻	
Tag MAC ID		CANCEL	DIT TAG SAVE
A14CC6	<i>•</i>		

5 Sam clicks **Save** (shown inset above) and is returned to the Assets page. He applies the **Therapists** filter again and finds "Kara\_Small" at the top of the list, as expected.

#### Result

AL	L TY	PES							
Manage	Assets (4) 🕇		all filters				Search		٩
People	Therapist (Physical T	herapist, Radiation Thera	apist) 🙁						
Asset	(s) without Tag (0)						👄 BULK ASS	IGN	^
			No results found. Tr	y again with a differe	nt input				
Asset	(s) with Tag (4)					ltems per page 50 🔹	7 1 - 4 of 4	<	>
lcon	Name 🕇	Category	Туре	Department	Tag MAC ID	Asset ID			
٠	Kara_Small	People	Therapist (Physical T herapist,	Oncology	A14CC6	Small_4		×	/
•	Manu_Small	People	Therapist (Physical T herapist,	Gastroenterology	A14CCD	Small_17		×	/

6 The next task for Sam is to remove a button Tag from someone who no longer needs it, and then assign it to a new person. Transferring a Tag between Assets instead of enabling a new one helps keep the organization within their 1000 Tag license limit. Sam searches the Assets list and sees the Tag is currently assigned to the "Srishti\_Button" Asset. He clicks

RESULT

← Edit an Asset					
Name Srishti_Button		Department Neonatal intensive care unit		Asset ID Button_6	
Max 64 characters	14/64			Max 64 characters	8/64
Category		Туре			
Object	Ŧ	Vital Signs Monitors	Ψ	CANCEL	TAG SAVE
Tag MAC ID A10E9D					

7 Sam clicks **Edit Tag** (shown inset above) and sees the prompt below. The default option is **Change**, which permits editing the Tag settings while keeping it assigned to the current person (Asset).

← Edit an Asset			
Name Srishti_Button			lsset Butt
Max 64 characters	14/64		/lax 6
Category		Тур	
Object	-	Vital Signs Monitors	
Tag MAC ID A10E9D	<b>O</b> <sup>1</sup>	Edit Tag Removing an associated tag from an item will stop the tracking of item. How do you wish to proceed?	
		CANCEL REMOVE CHANGE	

8 Sam wants to stop tracking the current "Srishti\_Button" Asset, so he clicks **Remove**. When the operation is complete, the **Tag MAC ID** field shows "N/A", and the **Edit Tag** button has changed to **Add Tag** (shown inset below).

#### RESULT

← Edit an Asset					
Name Srishti_Button		Department Neonatal intensive care unit	Ŧ	Asset ID Button_6	
Max 64 characters	14/64			Max 64 characters	8/64
Category Object	*	Type Vital Signs Monitors	<b>.</b>	CANCEL ADD TAG	SAVE
Tag MAC ID N/A					

9

Sam clicks **Save** to apply the Tag removal change. The Assets page now shows "Srishti\_Button" under **Assets without Tag**, confirming the first step of his Tag transfer operation. Sam notes that the **Bulk Assign** link is now active because at least one Asset does not have a Tag assigned.

SULT							
ALI	TY	PES					
/lanage	Assets (100) 🕂	₹ FILTER				Search	
Asset(	s) without Tag (1)					👄 BULK	ASSIGN ^
						Items per page 50 💌 1 - 1 of	1 < >
lcon	Name <b>↑</b>	Category	Туре	Department	Tag MAC ID	Asset ID	
<b>••</b>	Srishti_Button	Object	Vital Signs Monitors	Neonatal intensive care unit	Required	Button_6	ā 🎽
Asset(	s) with Tag (99)				2	tems per page 50 ▼ 1 - 50 of 9	9 <b>&lt; &gt;</b>
lcon	Name <b>↑</b>	Category	Туре	Department		Asset ID	
₿.	Akhil_Battery	Object	Heat Therapy Units	Dermatology	264743	Battery_18	Ī 🗡
₿*	Akhil_Button	Object	End Tidal CO2	Endocrinology	A10D8B	Button_18	Ī /

10 To create the new Asset that will assume the unassigned Tag, Sam clicks + beside Manage Assets. He enters the Name, selects Neurology from the Department list, and then enters an Asset ID. Finally, he selects People from the Category list, and selects Techs (Radiology) from the Type list. At that point, the Available Tags list appears with a list of the Tags that can be assigned to this new Asset. By default, the first Tag is selected but Sam wants to use the one he just removed.

🔶 Add an Asset				
Name Ken_Button	Repartment Neurology	Asset ID Ken_Button_1		
Max 64 characters	10/64	Max 64 characters	12/64	
<sup>Category</sup> People	<ul> <li>Type</li> <li>Techs (Radiology Tech, Ultrasound Tech, ▼</li> </ul>	MANAGE TYPES		
Available Tags			Search	
Available Tags		ltems per page 50	Search	<
Available Tags Tag MAC ID	Tag Name	ltems per page 50  Type		
Tag MAC ID	Tag Name tag_A10E75			
		Туре		

he

e Des	scription							
	n enters the MAC ID he noted ects the checkbox beside the	earlier ("A10E9D") in the <b>Search</b> matching Tag.	box, and then clicks	${\sf Q}$ . When the search o				
Res	RESULT							
<del>\</del>	← Add an Asset							
	lame Ken Button	Department Neurology ~	Asset ID Ken Button 1					
-	Max 64 characters 10/64		Max 64 characters	12/64				
	People •	<sub>Type</sub> Techs (Radiology Tech, Ultrasound Tech, ▼	MANAGE TYPES					
A	Available Tags			A10E9D 😵				
			ltems per page 50	) 💌 1-1 of 1 < >				
	Tag MAC ID	Tag Name	Тура	CANCEL ADD ASSET				
	A10E9D	tag_A10E9D	Human Badge					

12 When Sam clicks Add Asset, the Assets page loads and the new "Ken\_Button" Asset appears in the Assets with Tags list. He notes that there is still one Asset without a Tag, as expected.

RESULT									
ALL	TYPE	5							
Manage As	ssets (101) 🕂	₹ FILTER					Search		٩
Asset(s)	without Tag (1)						G BULK ASS	SIGN	~
Asset(s)	with Tag (100)	•	Ċ	6	ltems per pag	se 50 💌	1 - 50 of 100	<	. >
lcon 1	Name 个	Category	Туре	Department	Tag MAC ID	Asset ID			ш
•	Ken_Button	People	Techs (Radiology Tech, Ultrasound	Neurology	A10E9D	Ken_Butte	on_1	×	/
<b>_</b> (	Office_Small_48	Object	PO2/CO2 Monitors	Endocrinology	A14D5A	Office_48		×	/

13 Sam clicks  $\equiv$  to expand the Cooper menu, and clicks **Logout** to end his Trellix Locate session.

#### 7.4 – Asset Procedures

This section includes procedures for using the main features of the Assets page.

#### 7.4.1 - Filters, Sorts, and Searches

The features that apply specifically to the Assets page are listed and described below.

Feature	Description
Filtering	The Asset Management filters support the standard Building, Floor, Department, Category (Object or People), and Category Type filters.
Sorting	The Assets with Tag and Assets without Tag lists both support searching of the Name, Asset ID, Asset Type, and Tag MAC ID fields.
Simultaneous Search	A search operation returns results for both the Assets with Tag and Assets without Tag lists.

#### 7.4.2 – Adding an Asset

Follow the steps below to add an Asset.

## 

ction						
lick <b>Assets</b> ,	and then click <b>+</b> bes	ide <b>Manage Asset</b>	S.			
Result						
← Add an As	set					
				. 12		
Max 64 characters	0/64	Department	Asse	4 characters	0/64	
Category						
Do the follow						
<ul> <li>Enter a Nar</li> </ul>	ne.					
Soloct a Do	partment from the li	et				
		51.				
<ul> <li>Enter an As</li> </ul>	set ID.					
Select a Ca	tegory ( <b>Object</b> or <b>Pe</b>	onle) and then sel	lect a Type			
		(opic), and then be				
Result						
🔶 Add an As	set					
Name		Department	Arrow			
Ken Button		Neurology	- Ken	Button_1		
Max 64 characters	10/64		Maxó	4 characters	12/64	
Category		Туре				
People	·	Techs (Radiology) Tech, U	trasound Téch,	MANAGE TYPES		
A						
Available Tags			-		A10EQD	
		$\mathbf{y}$			A10E9D	8
			0	ltems per pa		⊗
Tag MAC ID		Tag Name		ltems per pa Type	age 50 ▼ 1-1 of 1	< >
Tag MAC ID		Tag Name tag_A10E9D	3-		age 50 💌 1-1 of 1	< > DASSET

3 The Available Tags list will display Tags that can be assigned to this new Asset. By default, the first Tag is selected. Do the following:

- If necessary, apply a search to find the Tag you want to assign.
- Select the checkbox for the desired Tag.
- · Click Add Asset (shown inset above).

#### 7.4.3 - Editing the Basic Asset Data

Follow the steps below to edit the basic Asset data.

Step	Action
1	Click Assets, and then apply the necessary combination of filters and search to find the Asset you want edit.

Step	Action			
2	Click 🖍 for the Asset.			
	Example			
	← Edit an Asset			
	Name Kara_Small	Oncology -	Asset ID Small_4	
	Max 64 characters 10/64		Max 64 characters	7/64
	Category People	<sub>Type</sub> Therapist (Physical Therapist, Radiation 👻		
	Tag MAC ID A14CC6		CANCEL	TAG
3	Do one or more of the following: • Edit the Name.			
	Select a Department from the list	t.		
	Edit the Asset ID.			
	<ul> <li>Select a Category (Object or Peo</li> </ul>	<b>ple</b> ) from the list.		
	• Select a Type from the list.			
	When you have finished your editin			
4	If you modified the Department or <sup>-</sup> want to assign.	Type, the associated Tag will be r	emoved. Edit the Asset	again to select the Tag you
	Removing a Tag from an Asset			
Follow th	ne steps below to remove a Tag from a	an Asset.		
Step	Action			
1	Click <b>Assets</b> , and then apply the ne	cessary combination of filters an	d search to find the Tag	g you want edit.
2	Click 🖍 for the Asset, and then clie this Asset.	ck <b>Edit Tag</b> . You will be prompted	to <b>Cancel</b> , <b>Remove</b> , or	Change the Tag assigned to
	EXAMPLE Category	Туре		
	Object	<ul> <li>Vital Signs Monitors</li> </ul>	-	
	Tag MAC ID A10E9D	Edit Tag		
	A ROED	Removing an associated tag	g from an item will	
		stop the tracking of item. H		
		proceed?		
		CANCEL	EMOVE	
		CONCLE		

3 Click Remove, then confirm that the Tag MAC ID shows N/A, and then click Save.

#### 7.4.5 – Assigning a Tag to an Asset

Follow the steps below to assign a Tag to an Asset.

#### Step Action

1 Click **Assets**, and then expand the Assets without Tags section of the Manage Assets list.

ΤιΡ

You can apply combination of filters and search to limit the number of Assets displayed.

Step	Action
------	--------

Available Tags			Search Q
			ltems per page 50 ▼ 1 - 5 of 5 < >
	Tag MAC ID	Tag Name	Туре
	A10EA0	tag_A10EA0	Asset Tag 2yr
	A14D5E	tag_A14D5E	Human Badge
	A14D5F	tag_A14D5F	Human Badge
	A14D60	tag_A14D60	CANCEL ASSIGN TAG
	A14D62	tag_A14D62	

1.20

#### 7.4.6 – Bulk Assigning Tags to Assets

Follow the steps below to bulk assign a set of Tags to Assets.

#### Step Action

#### 1 Click Assets.

#### Νοτε

The Bulk Assign link will be unavailable if there are no Assets without a Tag assigned.

anage	Assets (71) +	₹ FILTER				S	earch	(
Asset	(s) without Tag (10)					G	BULK ASSIGN	~
Asset	(s) with Tag (61)					ltems per page 50 💌	1 - 50 of 61	$\langle \rangle$
lcon	Name 🕇	Category	Туре	Department	Tag MAC ID	Asset ID		
₿.	Bob's Water Bottle	Object	Water Bottles	Default	2646D9	PersonalAss	et_1 🔳	/
ē	Circle_1	Object	Adult/Paediatric Volumetric Pumps	Anesthesiology & Perioperative Care	5F901F	CA_1	×	1
⊴*	Circle_10	Object	Blood/Fluid Warmers	Gastroenterology	5F9021	CA_10	×	
	Circle_11	Object	Beds (specialty)/Rail Guards	General Internal Medicine	5F9020	CA_11	×	
⊿*	Circle_12	Object	Controllers, Infusion	Intesive care	5F901B	CA_12	x	
-	Circle_13	Object	Electrosurgical Generators	Maternity Ward	5F9019	CA_13	×	
⊴*	Circle_14	Object	Hyper-Hypothermia Units	Medicine. Basic and Clinical Immunology	5F9018	CA_14	×	1
-	Circle 15	Ohiost	Courte Chineselatorea	Neonatal intensive	550047	C1 45	-	

2

Click **Bulk Assign**. If necessary, apply the appropriate combination of Filters and Search to find the Assets you are interested in.

#### EXAMPLE

STEP 1: Select an /	Asset = FILTER Clea	ar all filters Q	STEP 2: Select a Tag		٩	
Object 🔕				ltems per page 50 👻	1 - 10 of 10 < >	
	Items per page 50 💌	1-9 of 9 < >			Type: Asset Tag 1yr	
Button_17	Type: Simple Spirom	Asset ID: Button_17			Type: Asset Tag 1yr	
Button_2	Type: Alternating Pr	Asset ID: Button_2			Type: Asset Tag 1yr	
Button_3	Type: Controllers, In	Asset ID: Button_3		MAC ID: 5F8D57	Type: Environment	
Button_4	Type: Continuous P	Asset ID: Button_4		MAC ID: CBC P	Type: Asset Tag 2yr	
Button_6	Type: Blood/Fluid W	Asset ID: Button_6		M 2 5 1039		
Button_7	Type: Foot Pumps	Asset ID: Button_7	tag_26473D	0 / 10:264735	Type: Asset Tag 2yr	
AMPLE	et on the left.			202.	DONE	
<b>AMPLE</b> ← Assign Multi	ple Tags			202.		
AMPLE	ple Tags	150	STEP 2: Select a Tag	Items per page 50	Q 1-10 of 10 < >	
AMPLE ← Assign Multi	ple Tags		STEP 2: Select a Tag	Items per page 50 • MAC ID: 5F90AA	٩	
AMPLE ← Assign Multi STEP 1: Select an . Button_17	Ple Tags Asset Items per page 21 Type: Simple Spiro	Asset ID: Button_17	20.		Q 1-10 of 10 < >	
AMPLE  Assign Multi STEP 1: Select an a Button_17 Button_2	Ple Tags Asset	Asset ID: Button_2	tag_5F90AA	MAC ID: 5F90AA	Q 1-10 of 10 < > Type: Asset Tag 1yr	
AMPLE  Assign Multi STEP 1: Select an a Button_17 Button_2 Button_3	Ple Tags Asset	Asset ID: Button_2 Asset ID: Button_3	tag_5F90AA tag_5F90D1	MAC ID: 5F90AA MAC ID: 5F90D1	Q 1-10 of 10 < > Type: Asset Tag 1yr Type: Asset Tag 1yr	
AMPLE  Assign Multi STEP 1: Select an a Button_17 Button_2 Button_3 Button_4	Ple Tags Asset	Asset ID: Button_2 Asset ID: Button_3 Asset ID: Button_4	tag_5F90AA tag_5F90D1 tag_5F8D57	MAC ID: 5F90AA MAC ID: 5F90D1 MAC ID: 5F8D57	Q       1-10 of 10       Type: Asset Tag 1yr       Type: Asset Tag 1yr       Type: Environment	
AMPLE  Assign Multi STEP 1: Select an a Button_17 Button_2 Button_3	Ple Tags Asset	Asset ID: Button_2 Asset ID: Button_3 Asset ID: Button_4	tag_5F90AA tag_5F90D1 tag_5F8D57 tag_5F90C7	MAC ID: 5F90AA MAC ID: 5F90D1 MAC ID: 5F8D57 MAC ID: 5F90C7	Q       1-10 of 10       Type: Asset Tag 1yr       Type: Asset Tag 1yr       Type: Environment       Type: Asset Tag 1yr	

5

4 If necessary, enter a Search string to limit the Tags displayed on the right.	
---	--

#### EXAMPLE

STEP 1: Select an	Asset \Xi FILTER Clear all filter	rs <b>Q</b>	STEP 2: Select a Tag	×	5F8 <b>8</b>	
				Items per page 50	▼ 1-4 of 4 < >	
	ltems per page 50 * 1 - 9	e fo f 9 🔍 📏	tag_5F8D57	MAC ID: 5F8D57	Type: Environment	
Button_17	Type: Simple Spiro Asset	t ID: Button_17	tag_5F8CF8	MAC ID: 5F8CF8	Type: Asset Tag 2yr	
			tag_5F8D58	MAC ID: 5F8D58	Type: Environment	
			tag_5F8D39	MAC ID: 5F8D39	Type: Asset Tag 2yr	
					2	
AMPLE	get Tag on the right.			201	DONE	
CAMPLE ← Assign Multi	ple Tags	5 69	STEP 2 KLEON TA	×		
CAMPLE ← Assign Multi	ple Tags	500	STEP 2: LEG TA	Kens per page 50	5F8 @	
CAMPLE ← Assign Multi	ple Tags		STEP 2: SPRD:S7		5F8 @	
CAMPLE ← Assign Multi	ple Tags Asset 〒 FILTER Clear all filter	:ID: Button_17 😋	STEP 2/SECONTAG		5F8 ● ▼ 1-4of4 < >	
CAMPLE Assign Multi STEP 1: Select an a Object	Ple Tags Asset	ID: Button_17	STEP 2: Dieco Trag Gig 5: 5: 8: 057 Lag 5: 5: 8: 057 Lag 5: 5: 8: 057	Items per page 50	5F8 ● ▼ 1-4of4 < > Type: Environment	
CAMPLE ← Assign Multi STEP 1: Select an a Object ● Button_17	Ple Tags Asset = FILTER Clear all filter Rems per parties of the second	1D: Button_17		MAC ID: SF8D57 MAC ID: SF8CF8	5F8       ✓       1-4of4       ✓       Type: Environment       Type: Asset Tag 2yr	
CAMPLE ← Assign Multi STEP 1: Select an a Object Button_17 Button_2	Ple Tags Asset ₹ FILTER Clear all filter Items per particular of the Type: Simple Spiro Asset	ID: Button_17 (3) (0): Button_2 (1): Button_2 (1): Button_3	tag_5F8D58	terns per page 50 MAC ID: SF8D57 MAC ID: SF8CF8 MAC ID: SF8D58	5F8       ✓       1-4or4       ✓       Type: Environment       Type: Asset Tag 2yr       Type: Environment	
CAMPLE ← Assign Multi STEP 1: Select an a Object Button_17 Button_2 Button_3	ple Tags Asset ₹ FILTER Clear all filter terms per particle Type: Simple Spiro Asset Type: Controllers, In Asset	ID: Button_17       Image: Constraint of the second s	tag_5F8D58	terns per page 50 MAC ID: SF8D57 MAC ID: SF8CF8 MAC ID: SF8D58	5F8       ✓       1-4or4       ✓       Type: Environment       Type: Asset Tag 2yr       Type: Environment	

6

Click 🗢 to assign the Tag. Each Asset-Tag assignment you create will appear in an Assigned section near the top.

#### EXAMPLE

Assigned ( 1 )						^
Name 个	Category	Туре	lcon	Department Tag	Asset ID	
Button_17	Object	Simple Spirometry	⊿*	Family Medicin tag_5F80	CF8 Button_17	Ì
TEP 1: Select an <i>i</i>	Asset \Xi F	FILTER Clear all filter	s Q	STEP 2: Select a Tag	×	5F8 @
Object 🙁						▼ 1-3 of 3 < >
	ltems per	page 50 🔻 1-8	of 8 <	tag_5F8D57		
Button_2	Type: Alte	ernating Pr Asset	ID: Button_2	tag_5F8D39	MAC ID: 9-009	Type: Asset Tag 2yr
Button_3	Type: Cor	ntrollers, In Asset	ID: Button_3	tag_5F8D58		Type: Environment
Button_4	Type: Cor	ntinuous P Asset	ID: Button_4			

7 Repeat Steps 3 to 6 until you have completed all the assignments, and then click Done.

#### 7.4.7 – Modifying the Asset Types

Follow the steps below to add or edit the available Asset Types.

#### Νοτε

You can also modify the Asset Types list using the **Manage Types** link. It will appear beside the Type list on screens such as Add An Asset.

# Step Action 1 Click Assets, and then click Types. Example ALL TYPES ALL TYPES Manage Types + 〒 FILTER Search Q

			Items per page 50 * 1 - 11 of 11	
lcon	Asset Type 个	Category	Additional Information	
*	Babies	People		×
7	Cleaning Crew	People		×
1	Default People Type	People		
9	Doctors/Physician (ER doctors, surgeons, hospitalists)	People		×
-	Medical Assistants	People		
2	Medical Technologist, Medical Laboratory Technologist.	People		x

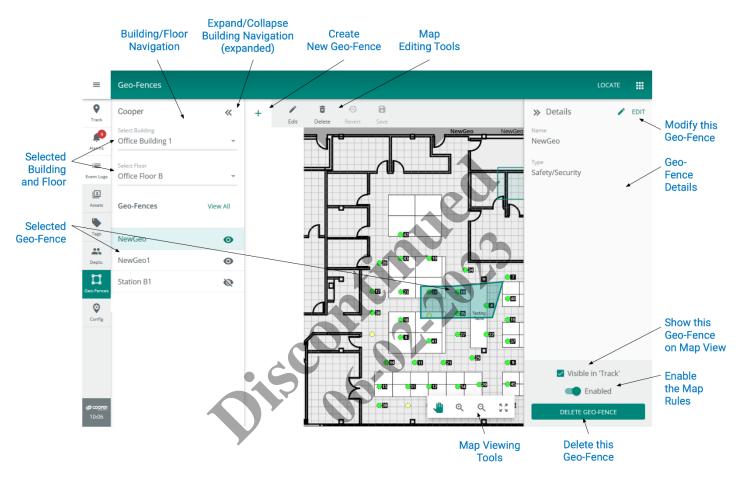
Action
If you want to: • Add a new Asset: Click <b>+</b>
· · · · ·
 • Edit an existing Asset: Apply a combination of filters and search to find the one you want, and then click
Edit the Name, select a Category, and then select the Icon that will be used for Assets of the type.
Example
← Add an Asset Type
Name Caraony
Monitor Object O People
Max 64 characters 7/64
Supported Tag Types
□ Human Badge □ Asset Tag 2yr □ Asset Tág Syr
Asset Tag 1yr Environment Tag Bracelet Tag
Additional Information (optional) + ADD FIELD There are no additional information fields set up for this Asset Type.
 Select the checkbox for each Supported Tag Type that can be associated with this Asset.
To add a custom field for Additional Information, click + Add Field.
Enter the Label for this new field, the Field Type (Date, Number, Paragraph, Short Text, or Time), and then select the
Paguirad Field checkbox if you want to make this information mandatory
Required Field checkbox if you want to make this information mandatory.
Νοτε
<b>N</b> оте You will have to provide an additional Units of Measure value for a Number field.
Note You will have to provide an additional Units of Measure value for a Number field. EXAMPLE
<b>N</b> оте You will have to provide an additional Units of Measure value for a Number field.
NoTE You will have to provide an additional Units of Measure value for a Number field.
Note You will have to provide an additional Units of Measure value for a Number field.
NoTE You will have to provide an additional Units of Measure value for a Number field.
Note You will have to provide an additional Units of Measure value for a Number field.
Note You will have to provide an additional Units of Measure value for a Number field.
Nore You will have to provide an additional Units of Measure value for a Number field.
Nore You will have to provide an additional Units of Measure value for a Number field.
Nore You will have to provide an additional Units of Measure value for a Number field.
Note To uvill have to provide an additional Units of Measure value for a Number field. Example Add an Asset Type Add an Asset Type Property Object People
Nore You will have to provide an additional Units of Measure value for a Number field. Example Add an Asset Type
Nore You will have to provide an additional Units of Measure value for a Number field. Example Image: Supported Tag Types         Human Badge         Asset Tag 2yr         Asset Tag 1yr

# 8 – Geo-Fence Management

This chapter describes the features available under Geo-Fences in the Cooper menu.

#### 8.1 - The Geo-Fences Page

The Geo-Fences page is shown below with a filtered list of Geo-Fences. One of the listed Geo-Fences has been selected, causing the Details panel to appear.



#### 8.2 - Geo-Fences

A Geo-Fence is a named virtual boundary that defines a region within a Floor. A Geo-Fence can be created as a simple rectangle or a more complex polygon with many sides. The image below shows a Geo-Fence in the process of being drawn. Each dark circle is a handle that can be dragged to extend the shape or increases the number of sides that comprise it.

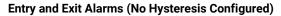


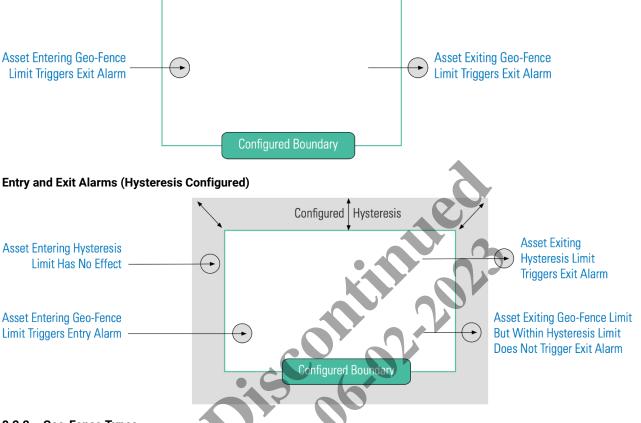
Other features:

- Geo-Fences can overlap
- If a Geo-Fence is deleted, all data associated with it is also deleted
- Geo-Fence data is stored with an Asset and not the Tag assigned to it, so if a Tag is reassigned to a different Asset, the Geo-Fence data will stay with the original Asset

#### 8.2.1 - Hysteresis

You can specify an optional hysteresis (lagging) value when creating or editing a Geo-Fence. Hysteresis applies only to exit notifications and has the effect of making the boundary "thicker". For example, if a hysteresis of two feet is specified and an exit alarm is configured, the notification will only occur if the Asset crosses the Geo-Fence boundary as drawn and goes two feet or more beyond it. The diagram below illustrates the difference between entry and exit alarms, with and without hysteresis.





#### 8.2.2 - Geo-Fence Types

Trellix Locate provides a default set of Geo-Fence Types:

- Safety/Security
- Analytics
- Boundary

You can create new custom Types as needed.

#### 8.3 - Rules

A Rule can be attached to a Geo-Fence to define if and how an Alarm or Event will be triggered when an Asset crosses the Geo-Fence boundary. For example, a Rule could have the following configuration:

- Entry: Notify when any Asset goes within the boundary of this Geo-Fence
- Create alarm: Generate an alarm when any Asset exits this Geo-Fence
- Individual assets: Only notify if a member of a designated list of Assets enters

Rules are optional, so you can create a Geo-Fence without one.

#### 8.3.1 - Rule Settings

The Rule settings available are described below.

Setting	Options
Rule type	• Entry
	• Exit
	Entry and Exit
Notification type	Create event
	Create alarm
Rule applies to	One or more selected Assets
	<ul> <li>All Assets of a selected Asset Type (e.g., Vital Signs Monitors)</li> </ul>
	<ul> <li>All Assets of one or more selected Category Types (e.g., Object, People)</li> </ul>
	<ul> <li>All Assets of one or more selected Departments (e.g., Cardiology, Critical Care)</li> </ul>

#### 8.4 - Geo-Fence Management - A Walk-Through

This walk-through follows a fictional user, Maya, as she works with the Geo-Fences page to create a new Geo-Fence and Rule.

#### Phase Description

≡	Geo-Fences								LOCATE	
<b>Q</b> Track	Cooper	« +	Edit	Delete Rev	rt Save			» Details	🖍 EDIT	
Alarms	Select Building Office Building 1	Ŧ				NewG		Name NewGeo		
Event Logs	Select Floor Office Floor B		Ś					Type Safety/Security		
Assets	Geo-Fences	Viêw All			4 🗆					
Tags	NewGeo	Θ	,							
Depts.	NewGeo1	Θ								
Geo-Fences	Station B1	ø		d	•00 •20	•23 •C				
Config				╧┛┙╴			Testing Table			

2

Maya clicks + to add a new Geo-Fence to the selected Floor. She enters "Station B1" as the Name, then selects Analytics as the Type. In the Rules (optional)section, she selects an Entry or Exit Rule, and Create Event as the Notification Type.

#### RESULT

- Add Geo-fenc	-				
Name Station B1		<sub>Type</sub> Analytics	•	MANAGE TYPES	
🗌 Alert Radius 🤇	)				
Rules (optional)					
Rule		Notification Type			
Entry or Exit	~	Create Event	Ŧ		
Rule applies to					
None	~				×

3 Maya wants this Rule to apply to a single Asset, so she selects **Individual Assets** in the Rule applies to list, which brings up an Asset selection list. Maya clicks **Filter**, and then applies the **Object** and **Apnoea Monitor** filters. This brings the "Manu\_Button" Asset into view, which she selects with the corresponding checkbox.

RESULT				<b>CO</b>	
← Select Ass	et \Xi FILTER Clear Filte	r			
Object 🚫 Ap	onoea Monitors 🛞				
				ltems per page	50 ▼ 1-2 of 2 < >
•	Name <b>↑</b>	Category	Туре	Department	Tag
$\checkmark$	Manu_Button	Object	Apnoea Monitors	Oncology	tag_A10EB7
	Office_Small_8	Object	Apnoea Monitors	Endocrinology	CANCEL ADD TO RULE

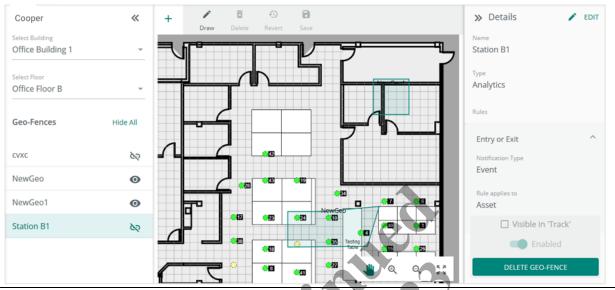
4 To complete the configuration of this Rule, Maya clicks **Add to Rule** (shown inset above). This enables the next step, which is to draw the Geo-Fence on the Floor Map.

🕂 Add Geo-fence	ž					
Name Station B1		Type Analytics	Ŧ	MANAGE TYPES		
Alert Radius @						
Rule		Notification Type				
Entry or Exit	~	Create Event	Ŧ		CANCEL DRAW GEO-FENCE	

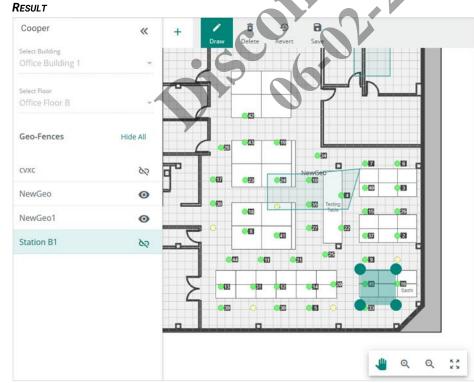
5

Maya clicks Draw Geo-Fence (shown inset above) to bring up the Floor Plan display in drawing mode. She notes the 🖘 beside Station B1, the new Geo-Fence she is creating. This indicates that Station B1 has not been linked to a Floor Map yet.

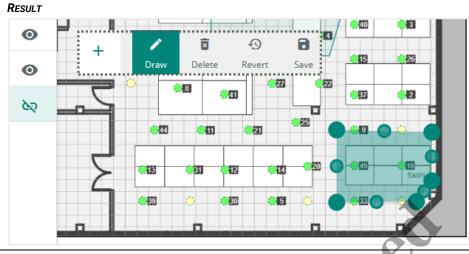
#### RESULT



To draw the Geo-Fence on the Floor Map, Maya uses the 🔍 and 🖑 tools to zoom in on the section of the map where the 6 fence is required. Next, she clicks Draw, and then clicks on the Floor Map near where the Geo-Fence is required. A green bounding box with dark green round handles appears.



7 Maya clicks the upper-right handle to drag it to the right. This causes a new handle to appear between the two upper corners. These "magic" handles make it easy to create Geo-Fences with irregular shapes. Maya uses this feature to deal with the bottom right boundary, which has two 45-degree bends instead of a 90-degree corner.



8 Maya clicks d (shown inset above) to apply the Geo-Fence to this Floor Map. The selected Station B1 now has beside it, confirming that the new Geo-Fence was added. Maya clicks the Visible in Track checkbox so this Geo-Fence will appear on the Map View tab of the Track page.

RESULT		, ,
Station B1		
	Table (12 (723))	
	Station B1	
		Visible in 'Track'
		Enabled
	<b>n n n n n n n n n n</b>	DELETE GEO-FENCE

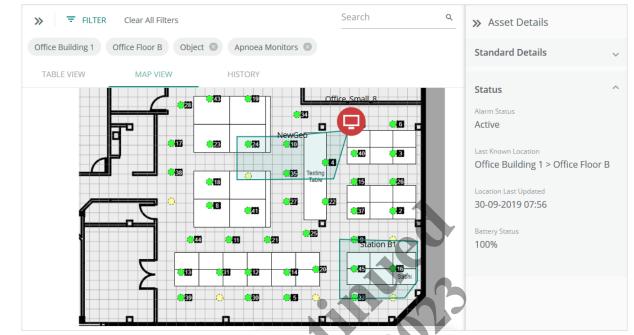
9 To check the Track display of her new Geo-Fence, Maya clicks **Track**, and then applies the **Object** and **Apnoea Monitors** filters. Finally, she selects the "Manu\_Button" Asset to display the Asset Details panel.

#### Result

=	Track							Locate 🔡
♥ Track	c	₹ FILTER (	Clear All Filters			Search	٩	× Asset Details
۰	Objec	t 🕲 Apnoea M	onitors 🕲					Standard Details
larms	TAB	LE VIEW	MAP VIEW	HISTOR	Ŷ			Status
ent Logs	Refresh	ed Today at 08:40			Rows per page	50 💌 1 - 2 of 2	$\langle \rangle$	Alarm Status
ussets	lcon	Name	Asset ID	Asset Type	Tag MAC ID	Last Known Location	ш	Active
Tags	Ģ	Manu_Button	Button_17	Apnoea Monitors	A10EB7	Office Building 1 > Office		Office Building 1 > Office Floor A
And	Ģ	Office_Small_8	Office_8	Apnoea Monitors	A14CD6	Office Building 1 > Office		Location Last Updated 30-09-2019 08:36
Fences								SHOW ON MAP

10 Maya clicks Show on Map (shown inset above) to bring up the Map View with Building and Floor taken the Last Known Location. She sees the current Asset location and the Station B1 Geo-Fence map, as expected.

#### RESULT



11 Maya clicks  $\equiv$  to expand the Cooper menu, and then clicks **Logout** to end her Trellix Locate session.

#### 8.5 - Geo-Fence Procedures

This section includes procedures for using the main features of the Geo-Fences page.

#### 8.5.1 - Filters, Sorts, and Searches

The features that apply specifically to the Geo-Fences page are listed and described below.

Feature	Description
Filtering	<ul> <li>The filters available on the Geo-Fence page are Building and Floor, since a Geo-Fence can only be found on a Floor Map</li> <li>The Rule configuration includes filters for Category (Object or People), Category Type (e.g., "Cardiographs"), and Assets</li> </ul>

#### 8.5.2 - Viewing Geo-Fences

Follow the steps below to view the Geo-Fences on a Floor.

#### Step Action

1

Click Geo-Fences, then choose a Building from the Select Building list, and then choose a Floor from the Select Floor list.

#### EXAMPLE



2 Click a Geo-Fence from the ones listed to display the Geo-Fence Details panel.

#### EXAMPLE



#### 8.5.3 – Adding a Geo-Fence

Follow the steps below to add a Geo-Fence to a Floor.

#### Step Action

1

2

Click **Geo-Fences**, then choose a Building from the **Select Building** list, and then choose a Floor from the **Select Floor** list. Click **+** above the Floor Map.

#### EXAMPLE

Name Station B1	Type Analytics	MANAGE TYPES			
🗌 Hysteresis 🛛 🛛 🖉					
Rules (optional)					
Rule Entry or Exit	Notification Type     Create Event	<b>•</b>			
			CANCEL	GEO-FENCE	
Rule applies to None	▼				×
the following: inter the Name elect the Geo-I	Fence Type.		1 N		
inter the Name Relect the Geo-F Relect the <b>Hyste</b> <b>res</b> The Hysteresis See the Adding	Fence Type. Eresis check box an setting is optional,	d enter a value supports a maximum of 2. elow to use that option	3 feet (7 meters), and app	lies only to exit no	tifications
inter the Name Relect the Geo-F Relect the <b>Hyste</b> <b>res</b> The Hysteresis	Fence Type. Eresis check box an setting is optional,	supports a maximum of 2	3 feet (7 meters), and app	lies only to exit no	tifications
inter the Name Relect the Geo-F Relect the <b>Hyste</b> <b>res</b> The Hysteresis See the Adding	Fence Type. Eresis check box an setting is optional,	supports a maximum of 2	3 feet (7 meters), and app	lies only to exit nc	tifications
Inter the Name Relect the Geo-F Relect the <b>Hyste</b> <b>TES</b> The Hysteresis See the Adding <b>MPLE</b> - Add Geo-fence	Fence Type. eresis check box an setting is optional, a Rule procedure b	supports a maximum of 2	3 feet (7 meters), and app	lies only to exit no	tifications
inter the Name relect the Geo-F select the <b>Hyste</b> <b>res</b> <i>The Hysteresis</i> <i>See the</i> Adding	Fence Type. Eresis check box an setting is optional,	supports a maximum of 2	3 feet (7 meters), and app	lies only to exit nc	tifications
Inter the Name Relect the Geo-F Relect the <b>Hyste</b> <b>TES</b> The Hysteresis See the Adding <b>MPLE</b> - Add Geo-fence	Fence Type. eresis check box an setting is optional, a Rule procedure b	supports a maximum of 2	3 feet (7 meters), and app	lies only to exit no	tifications

CANCEL

62

×

Rule

Entry or Exit

Rule applies to None

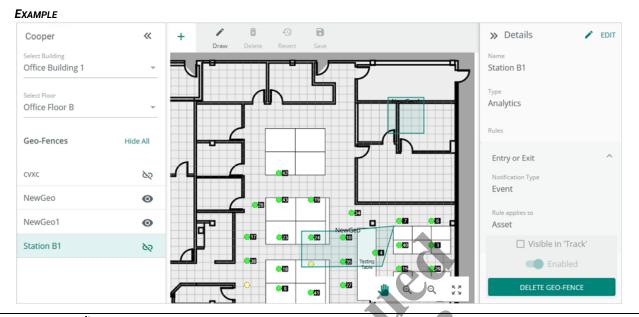
Notification Type

Create Event

\_

~

3 Click Draw Geo-Fence. Your new Geo-Fence will be listed with a 🖘 to indicate it has not been linked to a Floor Map yet.



4 Use O and W in the Map Editing Tools to zoom in on the map region where the fence is required. Click **Draw** in the Map Editing Tools (shown above), and then click a location on the Floor Map.

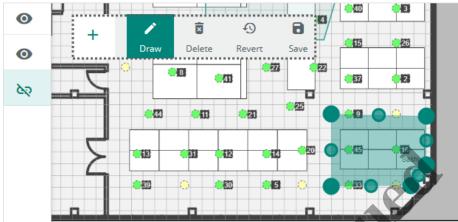
#### Νοτε

Example	
NewGeo1	
Station B1	
	4 Q Q 53

5

- To create the desired Geo-Fence shape:
- Click one of the four default handles that needs to be moved and drag it to the new location.
- Notice that one or two new, smaller handles appear between the one you dragged and the corners to which it connects.
- These "magic" handles appear any time you drag a handle to make it easy to create Geo-Fences with irregular shapes.
- · Continue dragging the handles until you have the shape you want.

#### EXAMPLE



- 6 Do the following:
  - If you are satisfied with the Geo-Fence shape, click 🖬 in the Map Editing tools (shown inset above).
  - If you want to undo the changes you made, click 🕑, and then continue.
  - If you want to start over, click 📋 , and then continue.
- 7 When you have successfully saved your changes, your new shape will show ●. With the Geo-Fence selected, you can do the following in the Details panel:
  - · Select or deselect the Visible in Track checkbox to determine whether it appears on Asset tracking Floor Maps.
  - Toggle the Enabled button to control whether it generates notifications.

#### 8.5.4 - Removing a Geo-Fence

To remove a Geo-Fence, select the desired Building and Floor, then select the Geo-Fence, and then click **Edit** in the Details panel. Click **Delete Geo-Fence**.

#### 8.5.5 – Managing Geo-Fence Types

Follow the steps below to manage the Geo-Fence Types.

#### Νοτε

See the earlier procedure, Adding a Geo-Fence, if you are creating a new Geo-Fence.

#### Step Action

1 Click **Geo-Fences**, then choose the desired Building and Floor. Click the desired Geo-Fence, and then click **Edit**.

#### EXAMPLE

Name Closed Hallway	<sub>Туре</sub> Boundary	MANAGE TYPES	
✓ Hysteresis	Hysteresis 5	ft	
Rules (optional)			
Rule	Notification Type		
None -	None		
Rule applies to			
None -			×
			CANCEL

3 Click Save.

2

#### 8.5.6 – Adding a Rule

Follow the steps below to add a Rule to a Geo-Fence.

#### Νοτε

See the earlier procedure, Adding a Geo-Fence, if you are creating a new Geo-Fence.

#### Step Action

1 Click Geo-Fences, then choose the desired Building and Floor. Click the desired Geo-Fence, and then click Edit.

#### EXAMPLE

Name		Туре			
Station B1		Analytics	~	MANAGE TYPES	
Alert Radius	9				
Rules (optional)					
Rule Entry or Exit	~	Notification Type Create Event	Ŧ		
Rule applies to					
					×

2 To change the effective notification perimeter of the Geo-Fence (on exit only), click **Hysteresis**, and then specify a distance.

#### Νοτε

See Hysteresis for more information.

3 Choose a Rule type to determine the conditions under which a notification will trigger.

#### Νοτε

See Rule Settings for more information.

4 Choose a Notification Type to determine whether Alarms or Events are generated.

5 Choose Assets in Rule applies to list.

6 Provide details for each option in the Rule applies to list.

# 9 – Alarm and Event Management

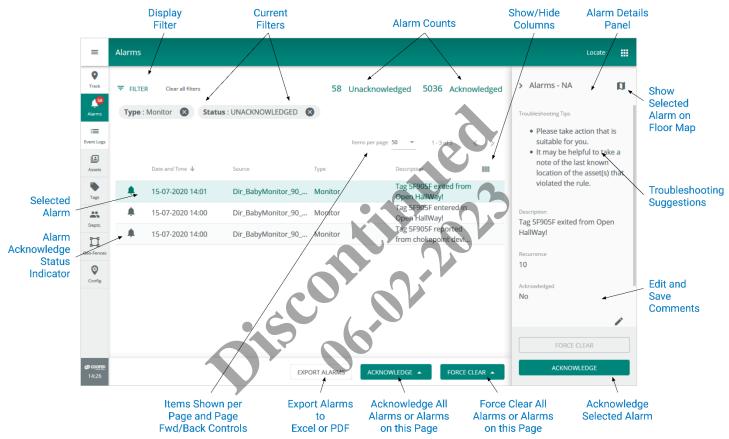
This chapter describes the features available under the Alarms and Events items in the Cooper menu.

## Νοτε

System-wide alarms and events are reported in the Trellix Admin application. Refer to the Trellix Lighting System Configuration Guide for more information.

## 9.1 – Alarms Page

The layout of the Trellix Locate Alarms page is shown below. The Events page is similar but does not include a Details panel or provide acknowledgement features.



#### 9.2 - Alarm States

A Trellix Locate alarm can be in one of the following three states:

- Unacknowledged Alarm: An error notification that has not been acknowledged
- Acknowledged Alarm: An error notification that has been acknowledged but is still in the error state and has not yet been moved to the Events list
- Pre-Cleared Alarm: An error notification that has returned to normal before being acknowledged

## Νοτε

Trellix Locate does not maintain Tag locations when it goes offline, for example when restarting after a system upgrade. When the restart is complete, new alarms will be generated for Tags found inside a Geo-Fence, even if they were already there before the restart.

#### 9.3 - Alarm and Event Procedures

The following procedure describes how to view and filter alarms and events, and how to acknowledge, force clear, comment on, and display the details of alarms.

If you want to	Then
Display the Alarms page	Click Alarms in the Cooper menu.
Display the Events page	Click <b>Events</b> in the Cooper menu.

	Then						
Sort alarm or event data	1. Click the column header you want to sort on.						
	2. To reverse the order, click the column header again.						
	Example – Descending Sort By Source						
	Date and Time	Source 个					
	<b>4</b> 30-09-2019 07:25	Akhil_Battery					
	<b>4</b> 30-09-2019 09:15	Akhil_Button					
	<b>4</b> 26-09-2019 15:44	Akhil_Button					
	<b>4</b> 26-09-2019 15:45	Akhil_Button					
Filter alarm or event data	1. Click Filter, then click Filter Typ	<b>be</b> , and then choose a specific filt	er (e.g., <b>Source</b> ).				
	2. Select or enter a value to limit t	he list to rows containing that va	lue (e.g., "Arjun_Button").				
	Example – Filter by Source Subtype						
	FILTER						
	Filter Type	Source Subtype					
	Source	Arjun					
	Atjun_Battery						
	Arjun_Button						
	Date and Time	Arjun_Small					
	Date and Time 🗣						
	<b>4</b> 30-09-2019 10:27	Brian_Battery					
	3. View the list of alarms or event	s that correspond to the selected	l filter.				
	EXAMPLE - ALARMS FILTERED BY SOUR	ce Subtype "Arjun_Button"					
	EXAMPLE - ALARMS FILTERED BY SOUR	ceSubtype "Arjun_Button"	5349 Unacknowledged				
	<b>FILTER</b> Clear all filters	CE SUBTYPE "ARJUN_BUTTON"	5349 Unacknowledged				
	<b>FILTER</b> Clear all filters		5349 Unacknowledged				
	<b>FILTER</b> Clear all filters		5349 Unacknowledged				
	FILTER       Clear all filters         Status : UNACKNOWLEDGED       So	ource : Arjun_Button	Items per page 25				
	FILTER Clear all filters       Status : UNACKNOWLEDGED S       Date and Time ↓	ource : Arjun_Button Source	Items per page 25				
	FILTER       Clear all filters         Status : UNACKNOWLEDGED       So	ource : Arjun_Button	Items per page 25				
Add another filter	<ul> <li>FILTER Clear all filters</li> <li>Status : UNACKNOWLEDGED S So</li> <li>Date and Time ↓</li> <li>30-09-2019 09:23</li> <li>30-09-2019 09:04</li> </ul>	Source : Arjun_Button Source Arjun_Button Arjun_Button Arjun_Button	Items per page 25  Description Tag A10E68 exited from Tex				
	<ul> <li>FILTER Clear all filters</li> <li>Status : UNACKNOWLEDGED S So</li> <li>Date and Time ↓</li> <li>30-09-2019 09:23</li> <li>30-09-2019 09:04</li> <li>Repeat Steps 1 to 3 in the precedition</li> </ul>	Source Source Arjun_Button Arjun_Button Arjun_Button Ing procedure.	Items per page 25  Description Tag A10E68 exited from Tex				
	〒 FILTER Clear all filters         Status : UNACKNOWLEDGED S         Date and Time ↓         ▲ 30-09-2019 09:23         ▲ 30-09-2019 09:04         Repeat Steps 1 to 3 in the precedit         Click X to the right of the filter value	Source Source Arjun_Button Arjun_Button Arjun_Button Ing procedure.	Items per page 25  Description Tag A10E68 exited from Tex				
	<ul> <li>FILTER Clear all filters</li> <li>Status : UNACKNOWLEDGED S So</li> <li>Date and Time ↓</li> <li>30-09-2019 09:23</li> <li>30-09-2019 09:04</li> <li>Repeat Steps 1 to 3 in the precedition</li> </ul>	Source Source Arjun_Button Arjun_Button Arjun_Button Ing procedure.	Items per page 25  Description Tag A10E68 exited from Tex				
Add another filter Remove a filter	〒 FILTER Clear all filters         Status : UNACKNOWLEDGED S         Date and Time ↓         ▲ 30-09-2019 09:23         ▲ 30-09-2019 09:04         Repeat Steps 1 to 3 in the precedit         Click X to the right of the filter value	Source Source Arjun_Button Arjun_Button Arjun_Button Ing procedure.	Items per page 25  Description Tag A10E68 exited from Tex				
	〒 FILTER       Clear all filters         Status : UNACKNOWLEDGED       So         Date and Time ↓       Image: Status         Image: Status       Image: Status         Date and Time ↓       Image: Status         Image: Status       Image: Status	Source Source Arjun_Button Arjun_Button Arjun_Button Ing procedure.	Items per page 25  Description Tag A10E68 exited from Tex				

<b>f you want to</b> /iew alarm details	Then Click an alarm row to display a panel containing the Troubleshooting details, a Description, and any							
	Comments that have been saved.  Example							
	➡ FILTER Clear all filters	\$	Unacknowledged     42 Acknowledged	> Alarms - NA				
	Status : UNACKNOWLEDGED	Source : Arjun_Button	3	Troubleshooting Tips				
			ltems per page 25 ▼ 1 - 25 of 54 < >	<ul> <li>Please take action that is suitable for you.</li> <li>It may be helpful to take a</li> </ul>				
	Date and Time 🕹	Source	Description	note of the last known location of the asset(s) that				
	\$ 30-09-2019 09:23	2019 09:23 Arjun_Button Tag A10E68 exited from violated the interviolated the interv	violated the rule.					
	<b>4</b> 30-09-2019 09:04	Arjun_Button	Tag A10E68 exited from TestGeol99!	Description Tag A10E68 exited from				
	<b>a</b> 30-09-2019 07:25	Arjun_Button	Location information for Tag A10E68 unavailable!	TestGeol99!				
cknowledge a single arm	<ol> <li>Select the row of an u</li> <li>Click Acknowledge in</li> <li>Example</li> </ol>							
	₹ FILTER Clear all filters	4	9 Unacknowledged 42 Acknowledged	> Alarms - NA				
	Status : UNACKNOWLEDGED	Source : Arjun_Button		Troubleshooting Tips				
	Date and Time ↓ 30-09-2019 09:23	Score Acium Burton	Items per r25025 1 - 25 of 54 < >	<ul> <li>Please take action that is suitable for you.</li> <li>It may be helpful to take a note of the last known location of the asset(s) tha violated the rule.</li> </ul>				
	\$ 30-09-2019 09:04	Arrun_Button	Tag A10E68 exited from TestGeol991 Location information for Tag	Description Tag A10E68 exited from				
	30-09-2019 07:25	Arjun_Button	A10E68 unavailable!	TestGeol99!				
	26-09-2019 11:12	Arjun, Button	Tag A10E68 entered in RajGeo!	FORCE CLEAR				
	26-09-2019 11:11	Arjun_Button	Tag A10E68 exited from RajGeo!	ACKNOWLEDGE				
knowledge multiple arms	1. To acknowledge the a then click <b>Acknowled</b>		nt page, click <b>Acknowledge</b> belo <sup>.</sup>	w the list of alarms, an				
	<ol> <li>To acknowledge all a Acknowledge All.</li> </ol>	larms, click <b>Acknov</b>	<b>vledge</b> below the list of alarms, a	nd then click				
	Example							
			8 Unacknowled	ged 43 Acknowledged				
	Source : Arjun_Button 🔕 Dat	te and Time : Last Day 🔞						
			Items per page .5					
	Date and Time 4	Source	Description					
	30-09-2019 09:23	Arjun_Button	Tag A10E68 exited fro	om TestGeol99!				
	<b>4</b> 30-09-2019 09:04	Arjun_Button	Tag A10E68 exited fro	om TestGeol99!				
	<b>4</b> 30-09-2019 07:25	Arjun_Button	Location Information unavailable!	for Tag A10E68				
				Acknowledge Page				
				Acknowledge All				

EXPORT ALARMS

If you want to	Then							
Force clear an alarm	1. Select the row of an a 2. Click <b>Force Clear</b> in t							
	<b>Note</b> You must be logged in with System Administrator permissions for this action.							
	Example							
	T         FILTER         Clear all filters		8 Unacknowledged 43 Acknowledged	> Alarms - NA				
	Status : UNACKNOWLEDGED 😵	Source : Arjun_Button	∑ Items per page 25 ▼ 1-25 of 37191 < >	<ul> <li>It may be helpful to take a note of the last known location of the asset(s) that violated the rule.</li> </ul>				
	Date and Time 🖕	Source	Description	Description				
	30-09-2019 09:23	Arjun_Button	Tag A10E68 exited from TestGeoI99!	Tag A10E68 exited from TestGeol99!				
	\$30-09-2019 09:04	Arjun_Button	Tag A10E68 exited from TestGeol99!	Recurrence				
	<b>a</b> 30-09-2019 07:25	Arjun_Button	Location information for Tag A10E68 unavailable!	258				
	<b>a</b> 26-09-2019 11:12	Arjun_Button	Tag A10E68 entered in RajGeo!	Acknowledged Yes				
	<b>4</b> 26-09-2019 11:11	Arjun_Button	Tag A10568 exited from RajGeo!	FORCE CLEAR				
	26-09-2019 11:11	Arjun_Button	Tag A10E68 entered in RajGeo!	ACKNOWLEDGE				
	<b>2</b> 6-09-2019 11:09	Arjun_Button	Tag A10E68 exited from RajGeo!					

Force clear multiple alarms 1. To force clear the alarms on the current page, click Force Clear below the list of alarms, and then click Acknowledge Page.

> 2. To force clear all alarms, click Force Clear below the list of alarms, and then click Force Clear All. Νοτε

## You must be logged in with System Administrator permissions for this action.

J

.

## EXAMPLE

FILTER Clear all fiftees     Type ://Medical Assistants ⊗	06	5	8 Unacknowledged 5034	5 Acknowledged
			Items per page 50 🔻 1 - 50 c	of 415 < >
Date and Time $ \psi $	Source	Туре	Description	
15-07-2020 02:45	Sonni_042_DA7	Medical Assistants	Location information for 5F8DA7 unavailable!	or Tag
14-07-2020 18:45	Sonni_027_D48	Medical Assistants	Tag 5F8D48 exited from	n MidHW!
14-07-2020 18:42	Sonni_043_D0F	Medical Assistants	Tag 5F8D0F reported fr chokepoint device BLE	
14-07-2020 18:42	Sonni_043_D0F	Medical Assistants	Tag 5F8D0F exited from	n MidHW!
14-07-2020 18:42	Sonni_042_DA7	Medical Assistants	Tag 5F8DA7 reported fr chokepoint device BLE	
14-07-2020 18:42	Sonni_042_DA7	Medical Assistants	Tag 5F8DA7 exited fron	n MidHW!
14-07-2020 18:42	Sonni_042_DA7	Medical Assistants	Tag 5F8DA7 exited fron HallWay!	Force Clear Page
14-07-2020 18:42	Sonni_043_D0F	Medical Assistants	Tag 5F8D0F entered in	l U
			Tag SE8DNE exited from	Force Clear All
		EXPORT ALAR	ACKNOWLEDGE	FORCE CLEAR 🔺

If you want to	Then					
Add a comment to an	1. Select an unacknowledged alarm to reveal the Alarm Details panel.					
alarm	<ol><li>Scroll down in the panel to reveal the Leave a Comment field.</li></ol>					
	3. Click Edit.					
	4. Enter your comment text, and then click $\blacksquare$ to save it or click <b>X</b> to cancel.					
	Example					
	Acknowledged No					
	Leave a comment					
	Confirmed bad signal from tag.					
	FORCE CLEAR					
	ACKNOWLEDGE					
Hide alarm or event details	Click > in the upper left corner of the panel.					
Show or hide columns in	1. Click III at the right end of the column headings					
the alarms or events list	2. Select and deselect column checkboxes to determine which columns are displayed.					
	3. Click <b>Apply</b> .					
	Example					
	Source 1 Description					
	Alkhil Patton					
	Akhil_Battery					
	Akhil_Button Tag A1008B exited from					
	Akhil_Button					
	Aknil_Button					
	Akhil_Button					
	Akhil_Button Tag A10D8B exited from TestGeoG80!					
₋oad new alarms	Click <b>Reload</b> when it appears at the top of the Alarms tab.					
	Νοτε					
	Be sure to use the <b>Reload</b> button provided in the message area. The Web browser's refresh feature, by design, will send you back to the login screen.					

## 9.4 – Alarms

The Asset alarms reported by Trellix Locate are described below.

Alarm	Description
Battery low	Battery at 20%, or Battery at <nn>% for Tag MAC ID <mac-id></mac-id></nn>
Asset not reporting	<asset-name> is not reporting location information</asset-name>
Asset entering Geo-Fence	<asset-name> entered <geo-fence-name></geo-fence-name></asset-name>
Asset left Geo-Fence	<asset-name> left <geo-fence-name></geo-fence-name></asset-name>
Asset entered/left Geo-Fence	<asset-name> entered/left <geo-fence-name></geo-fence-name></asset-name>
Choke point	<asset-name> reported from choke point device <sensor-name></sensor-name></asset-name>
Button pressed	Button pressed on Tag <mac-id> assigned to <asset-name></asset-name></mac-id>
Sensor location not reported	Location information is not being reported by <ble-sensor-name></ble-sensor-name>

#### IMPORTANT

The Trellix system does not save or track Tag locations when it is offline, e.g., when rebooting after a system upgrade. When the system recovers after reboot, it will generate new alarms for Tags located inside Geo-Fences, even if those Tags were already inside that Geo-Fence before the reboot.

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# 10 – Asset Tracking

This chapter describes the features available under **Track** in the Cooper menu.

#### 10.1 - Table View, Map View, and History

The Track page has three tabs that provide different views of Asset location data: Table View, Map View, and History. These tabs are described below.

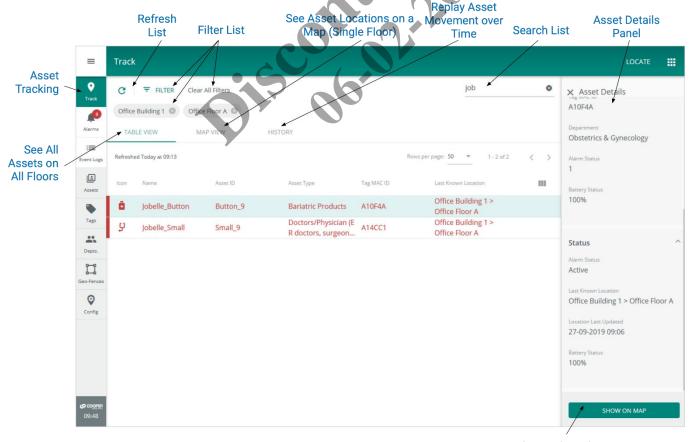
#### Νοτε

All three tabs support the same Filtering, Search, and Asset Detail panel features.

Tab	Description	When to Use
Table View	Displays, in a tabular form, all Assets for any Building or Floor that belong your assigned Departments and match any applied Filters and Search criteria.	<ul> <li>When you want to view Assets across multiple floors</li> <li>When the Last Known Location is the only spatial information you need</li> </ul>
		<ul> <li>When you need a detailed list of Assets and their data</li> </ul>
Map View	Displays, in map form, the Assets for a selected Building and Floor that belong to your assigned Departments.	<ul> <li>When you need a visual representation of Asset location, especially when you are interested in more than one</li> <li>When you need to see sensor locations</li> </ul>
History	Replays the movement of a single Asset, up to 7 days prior to the current date, using the same criteria as the Map View.	When you need to review the dynamic location of an Asset over time, up to 7 days prior, and the current day.

## 10.2 - Table View

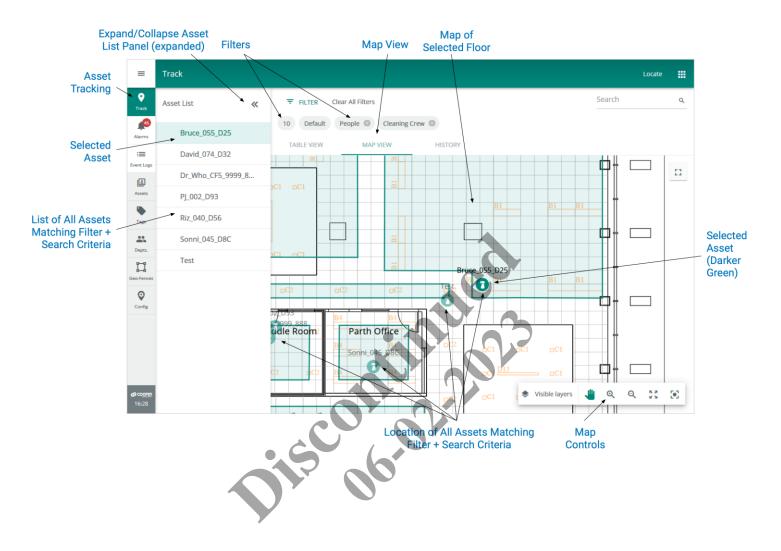
The Table View tab is shown below with a filtered list of Assets. A "job" search string has been applied and an Asset is selected, causing the Details panel to appear. Active alarms appear in red, Cleared and Acknowledged alarms in green.



Show Selected Asset on Floor Map

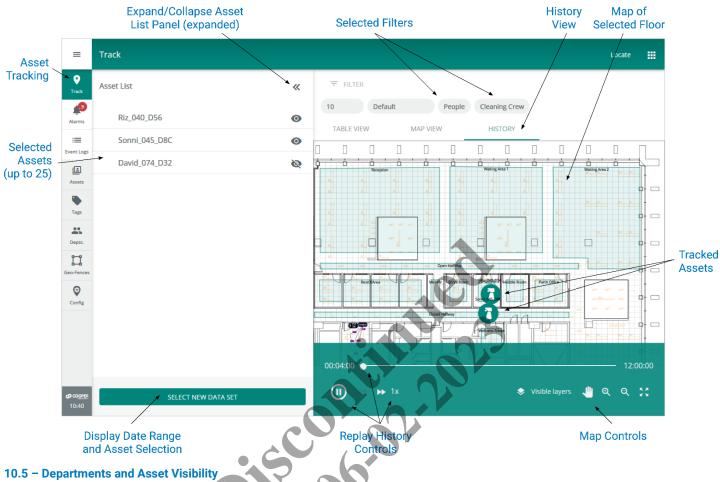
## 10.3 – Map View

The Map View tab, shown below, displays Assets that match any applied filter and search criteria. Assets in active alarm appear in red.



## 10.4 - History

The History tab, shown below, displays the replayed movement of selected Assets (up to 25). Active alarms appear in red.



When viewing any of the tabs on the Track page, the Assets shown are always limited to those in your Departments.

## 10.6 - Asset Out of Range (Not Reporting)

When an Asset moves outside the BLE sensor network for 15 minutes, it will have a "Presence Unknown" status on the Table View and it will appear at its last known location on the Map View. If it remains outside the network for 1 hour, an alarm will indicate that the asset is not reporting location information.

## 10.7 – Asset Tracking – A Walk-Through

This walk-through follows a fictional user, Maya, as she works with the Table View, Map View, and History tabs to examine the location and recent movement of a cleaning crew.

	-		t page and be	es all Assets matching h	ler deolgried i	opur unente.	
Resu	LT						
=	Track						ocate 🗰
• Track	c	₹ FILTER				Search	٩
Alarms	TAE	BLE VIEW MAP	VIEW HIS	STORY			
Event Log		ed Today at 14:03				Rows per page: 50 • 1 - 50 of 162	< >
L	lcon	Name	Asset ID	Asset Type	Tag MAC ID	Last Known Location	
Assets	<b>\$</b>	A_Bulk_5F8F7A_10	5F8F7A	Cold Therapy Units	5F8F7A	10 > Default > Sonni Room	<b>Q</b>
Tags	<b>\$</b>	A_Bulk_5F8FFF_14	5F8FFF	Cold Therapy Units	5F8FFF	10 > Default > Waiting Area 2	9
Depts.	ē	A_Bulk_5F900B_12	5F900B	Lymphedema Pumps	5F900B	10 > Default > Parth Office	•
11	<b>\$</b>	A_Bulk_5F9011_7	5F9011	Cold Therapy Units	SF9011	10 > Default > Parth Office	•
Geo-Fenc	<u>ه</u>	A_Bulk_5F9012_8	5F9012	Sequential Compression Devices	5F9012	10 > Default > Parth Office	•
Config	₽,	A_Bulk_5F9050_5	5F9050	Electrocardiographs	5F9050	10 > Default > Parth Office	9
To lir	nit the	number of asse	ts, Maya click	s <b>Filters</b> to reveal the filt	ter options.		
Resu	LT						
Filte Buildin All B			Floor	DI	Department <ul> <li>All Depart</li> </ul>	ments -	×
Categ				00			
	A D11			Cold Therapy Units		APPL	Y FILTER(S)
			F8F7A		5F8F7A	Room 10 > Default > Waiting	V
A The	A_Bu	lk_5F8FFF_14 5	F8FFF	Cold Therapy Units	5F8FFF	Area 2	9
Maya	a clicks	<b>All Buildings</b> ar	nd selects the	Building she is intereste	ed in, which lo	ads all the Floors for that E	Building.

Filters		_		_	×
Building		Floor		Department	
10	~	All Floors	~	All Departments	<b>•</b>
Category					
All Categories	~				
					APPLY FILTER(S)
●⊯ A_Bulk_5F8F7A_10	5F8F7A	Cold Therapy Units	5F8F7A	Area > Sonni R	oom 🔮

4 When the Floors have loaded, Maya selects a Floor, then selects **People** as the Category and **Cleaning Crew** as the Type. *Result* 

Filters			×
Building	Floor	Department	
10	<ul> <li>Extended Floor</li> </ul>	✓ All Departments	▼
Category			
People	▼		
Туреѕ			
All Types	Babies	Cleaning Crew	Default People Type
Doctors/Physician (ER doctors,	Medical Assistants	Medical Technologist, Medical L	Nurses(CRNA, RN, LPN/LVN, CNS)
Patients	Pharmacists	Techs (Radiology Tech, Ultraso	Therapist (Physical Therapist, R

5 When Maya clicks Apply Filters, the Table View refreshes but no results are found.

	Search	۹
0.2		
, Charles		
nput	9	9

6 Maya scans below the **Filter** button to review the filters she selected and realizes the Assets she is looking for may be on a different floor. She clicks **X** beside **Extended Floor**, which causes the results list to refresh. The Cleaning Crew members she was searching for are now listed, and the Last Known Location confirms they are on a different floor, named Default.

ESUL	г					
G		ers			Search	م
10 🛛	People 🙁 Cleaning C	rew 😣				
TAB	LE VIEW MAP VIEV	V HISTORY				
Refreshe	ed Today at 11:16				Rows per page: 50 • 1 - 7 of 7	< >
lcon	Name	Asset ID	Asset Type	Tag MAC ID	Last Known Location	
	Bruce_055_D25	5F8D25	Cleaning Crew	5F8D25	10 > Default > Waiting Area 2	•
	David_074_D32	5F8D32	Cleaning Crew	5F8D32	10 > Default > Reception	•
	Dr_Who_CF5_9999_888	5F8CF5	Cleaning Crew	5F8CF5	10 > Default > Huddle Room	•
	PJ_002_D93	5F8D93	Cleaning Crew	5F8D93	10 > Default > Huddle Room	•
	Riz_040_D56	5F8D56	Cleaning Crew	5F8D56	10 > Default > DP Room	•

7

When Maya clicks **Map View**, Trellix prompts her to select a Floor. Because she removed the Floor filter earlier, a map cannot be displayed until she applies a new Floor filter.

#### RESULT

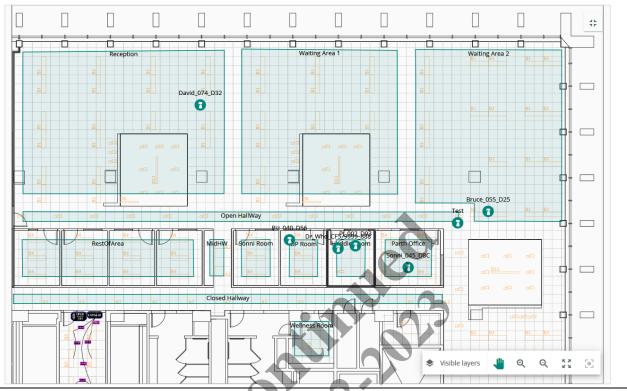
C				Search q
10 STAB	People Cleaning Cr LE VIEW MAP VIEW		HISTORY	
Refreshe	d Today at 11:16			Rows per page: 50 💌 1 - 7 of 7 🗶 📏
lcon	Name	Asset ID	Map View	Last Known Location
	Bruce_055_D25	5F8D25	Please select the building and floor you would like to view	10 > Default > Waiting Area 2
	David_074_D32	5F8D32	Building 10 ▼ Floor ▼	10 > Default > Reception
	Dr_Who_CF5_9999_888	5F8CF5		- 10 > Default > Huddle Room
	PJ_002_D93	5F8D93	CANCEL VIEW MAP	10 > Default > Huddle Room
	Riz_040_D56	5F8D56	Cleaning Crew 5F8D56	10 > Default > DP Room

8 Maya selects **Default** for the Floor, and then clicks **View Map**. The Floor Map appears with the Cleaning Crew assets shown at their last known locations. She notes that the filters applied now include the Default floor.



## 9 To get a larger map view, Maya clicks [].

## RESULT

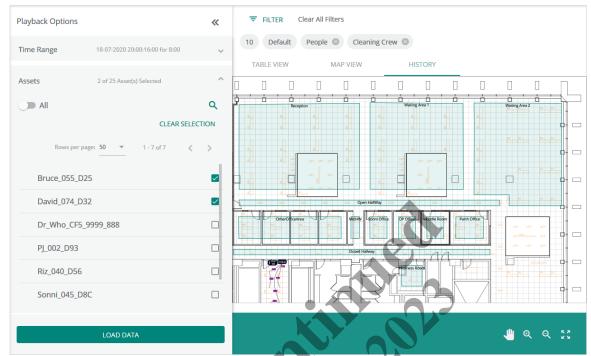


10 Maya clicks 🛟 to restore the standard view, and then clicks **History** to review yesterday's Cleaning Crew movements.

Playback Options		*		₹ FIL	TER	lear All Fil	ters								
Time Range	Time Frame Required	~	1	0 6	Default	People	⊗ Cle	eaning Cre	ew 🙁						
				TABLE	VIEW	1	MAP VIEW	/	Н	ISTORY					
Start Date															
Start Time - HH:MM	Duration - HH:MM		Ĵ		Recep	tion			Waitir	ng Area 1			Waiting Are	a2 81 81	
Assets	Asset(s) Required	~			#					oa oa					-
								E					<u>B1</u>	81 83	•
			204 204 204		ocz OtherOfficeAre Standard B		Refer C	pen HallWay	CP DP Office DP Office 194	2 oc Nikode 192	2 od2 Room Pa 9/2 84	th Office	9CT 211		-
				-1-1					Wellness	ΗĽ					
														J. Q.	

11 Maya specifies the Time Range she wants to review under Playback Options, and then selects Cleaning Crew members Bruce\_055-D25 and David\_074\_D32 under Assets.

#### RESULT



12 Maya clicks Load Data and the map loads in replay mode. She watches the Assets moving around the floor at real-time speed, beginning at the start time she specified. To get a better look, she collapses the Asset List panel and increases the icon size. To reduce her review time, she clicks ≯ to increase the playback speed.



13 Maya clicks  $\equiv$  to expand the Cooper menu, and clicks **Logout** to end her Trellix Locate session.

## 10.8 – Asset Tracking Procedures

This section includes procedures for using the main features of the Track page.

## Νοτε

See Filtering, Sorting, Paging, and Column Control (Track, Alarms, Events, Assets, Tags Displays) for detailed description of these features. Only the differences from those standard procedures are noted here.

## 10.8.1 - Filters, Sorts, and Searches

The features that apply specifically to the Track page are listed and described below.

Feature	Description								
Filters on Map View and History	The Map View and History tabs require a Building and a Floor filter. Those two filters can be changed to a new Building or Floor but cannot be cleared. Note the lack of <b>X</b> icons on the <b>10</b> (Building) filter and <b>Default</b> (Floor) filter in the example below.								
	Playback Options								
	Time Range 18-07-2020 20:00:16:00 for 8:00 🗸	10     Default     People     Cleaning Crew       TABLE VIEW     MAP VIEW     HISTORY							
	Assets 2 of 25 Asset(s) Selected  Assets Assets CLEAR SELECTION	IABLE VIEW MAP VIEW HISTORY							
Moving from Table View tab to Map View or History tabs	<ul> <li>On the Table View tab, if you</li> <li>Click Map View or History, you will be prompted to provide a Building and Floor</li> <li>Click O or Show on Map (for a selected Asset) the Building and Floor from the Last Known Location for the selected Asset are applied as filters before loading the Map View</li> </ul>								
Table View Sorts	The Table View tab supports sorting by Name, Asset ID, Asset Type, and Tag MAC ID.								
Table View Search	The Table View tab supports searching of the Name, Asset ID, and MAC ID fields.								
Map View Search	The Map View tab supports searching of the	Name, Asset ID, and MAC ID fields.							
Partial and Exact	d The Search feature on Map View tab has two modes: <i>partial</i> and <i>exact</i> . These are explained in the two exabelow.								
Matches on Map View Search	<b>PARTIAL EXAMPLE</b> You search for "susan" on the Map View tab when it is displaying Assets on Floor 1 of Building A. The search completes by showing two <i>partial matches</i> on Floor 1: "Susan_button", and "Susan_small".								
	expands to all Floors in the current Building, I found, the search completes with no results.	ew of Building A, Floor 1. There is no match on Floor 1, so the search but now it is looking for an <i>exact match</i> for "susan_button". If none are If an exact match is found, you are prompted to change Floors in the ded in Map View and it displays the location of the matching Asset.							

#### 10.8.2 - Locating a Specific Asset on Table View

There is more than one way to locate an Asset. The procedure below works well for most situations.

Τιρ

You can apply similar steps on the Map View or History tabs.

# Step Action 1 Click Track. Do you know the Name, Asset ID, or MAC ID value? • If yes, perform a search with the known value. • If no, apply the most specific filter or combination of filters.

Do you see the Asset you want?
<ul> <li>If <u>yes</u>, click it to display the Asset Details.</li> </ul>
<ul> <li>If <u>no</u>, go to Step 3.</li> </ul>
Do one or more of the following until you see the Asset:
Sort the list, <u>or</u>
<ul> <li>Adjust your filters, <u>or</u></li> </ul>
Page through the results.
Click the Asset to display the Details.

## 10.8.3 - Displaying a Specific Asset on Map View

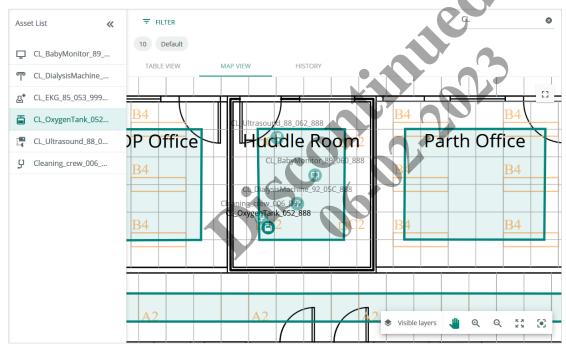
Follow the steps in the previous topic, and then click **9** in the list or click **Show on Map** in the Asset Details panel.

### 10.8.4 - Locating and Displaying a Group of Assets on Map View

An example Map View tab is shown below with the Asset List expanded, a "CL" text search applied, and an Asset selected.

## Νοτε

The Asset Details panel will not appear on the right when the Asset List panel is open on the left.



#### Procedure

Follow the steps below to locate and display a group of Assets on the Map View tab.

## Νοτε

It may not always be possible to get exactly the set of Assets you want and nothing else, but you can usually get close.

## Step Action

otep						
1	Click <b>Track</b> , and then click <b>Map View</b> . When prompted, select the Building and Floor you want when prompted, and then click <b>View Map</b> .					
2	If there are too many Assets being displayed, click <b>Filter</b> .					
3	If the target Assets all belong to a common Department (e.g., Cardiology), select it from the Department list.					
4	If the target Assets all fall under one or more Types (e.g., Medical Assistants, Techs), select the applicable Type checkboxes under <b>Object</b> or <b>People</b> .					
	<b>N</b> от <b>e</b> You can filter with multiple Object Types, or multiple People Types, but you cannot combine Object and People Types.					

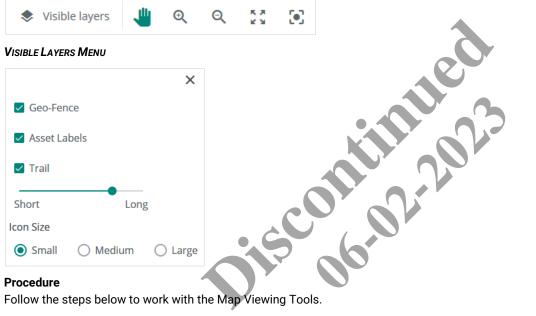
Release 8.0

Step	Action				
5	If you apply the Filters and there are still too many Assets displayed, see if you can add a Search for a common but unique string that the target Assets share (e.g., Asset IDs all contain with "XLT77").				
6	To display the list of Assets, click >> in the upper left.				
7	To view more information about an Asset, click it to open the Details panel.				
	<b>Nоте</b> The Asset Details panel will not appear on the right if the Asset List panel is open on the left.				

Click the selected Asset a second time to deselect it.

## 10.8.5 - Working with the Map Viewing Tools

The Map Viewing Tools, as they appear the Map View tab, are shown below. The 🕻 🕻 Full Screen tool that appears to the upper right of the map is also described. The Visible Layers menu options are shown separately.



## Procedure

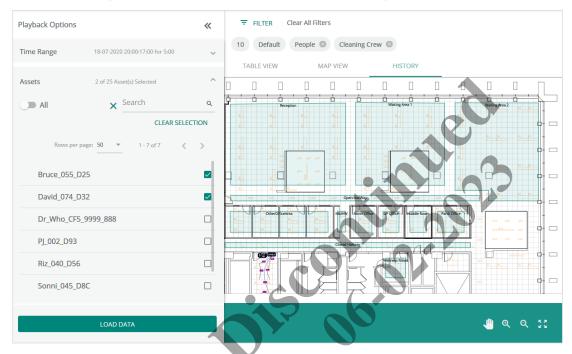
Follow the steps below to work with the Map Viewing Tools.

Tool	Action
•	Click to center the selected Asset and zoom in on it (unavailable until an Asset is selected).
Focus	
K 2	Click to fit the entire Floor Map into the display area.
Show Entire Map	
Q	Click to Zoom Out.
Zoom Out	
Q	Click to Zoom In.
Zoom In	
	Click to select and drag the map position.
Drag	

Tool	Action
	Click to
Visible layers	<ul> <li>Show or hide Geo-Fences</li> </ul>
	<ul> <li>Show or hide Asset Labels</li> </ul>
	<ul> <li>Change the size of the Asset icons</li> </ul>
	<ul> <li>Show or hide Asset Trail (disabled for multiple Assets)</li> </ul>
C 7 L J	Click to expand the map to fill the entire screen
	<ul> <li>Click # to restore the standard map size</li> </ul>

## 10.8.6 - Locating and Displaying Assets on the History Tab

An example History tab is shown below. Two Assets selected for replay over a 5-hour period.



## Τıp

Click the Asset to display the Details panel, and then check the **Location Last Updated** value. You will be able to replay the movement of an Asset for up to 7 days prior to the current date, depending on how long the Asset has been broadcasting its location.

### Procedure

Follow the steps below to locate and display a group of Assets on the History tab.

Step	Action
1	Click Track, and then click History. When prompted, select the Building and Floor you want, and then click Go to Replay.
2	Select a Start Date, then enter the Start Time and Duration for the replay.
3	Select one or more Assets in the Playback Options panel.
	<b>Тір</b> If there are too many assets listed, use a combination of Filters and Search to reduce the count.

## Action Step Δ Click Load Data to start the replay. **EXAMPLE FILTER** Asset List « 10 Default People Cleaning Crew David\_074\_D32 0 MAP VIEW HISTORY TABLE VIEW Bruce\_055\_D25 0 ċ 7 7 5:00:00 Q 👯 $( \triangleright )$ ۲ €

## 10.8.7 - Replaying Asset Movement on the History Tab

The Replay controls that appear during playback of Asset movement are shown below.

01:19:50				- 5:00:00
( ) •• •	▶ 8x	♦ Visible layers	🤚 ত্	ବ୍ଟୁ

#### **Replay History Limits**

The following limits apply to the History replay Parameters:

- The earliest Start Date can be 7 days before the current date (e.g., if today is September 30<sup>th</sup>, then September 23<sup>rd</sup> is the earliest date)
- The Duration cannot exceed 23 hours and 59 minutes
- The Maximum playback speed is 16x the real-time speed
- An Asset cannot be displayed if it moves off the current Floor, but you will be notified when that happens

#### Νοτε

Backing up and clearing historical location data is managed in Trellix Admin. See "Backing Up and Restoring" and "Clearing Utilization and Occupancy History" in the Trellix Lighting System Configuration Guide.

#### Procedure

Follow the steps below to replay the movement of an Asset on the History tab.

Step	Action
1	Select a Start Date, then enter a Start Time and Duration, and then click Load Data.

Step	Action
2	Click one or more Assets from the Playback Options list on the left.
	<b>Тір</b> If there are too many assets listed, use a combination of Filters and Search to reduce the number shown.
3	Use the following controls to manipulate the playback:
	• To pause the replay, click $m{0}$
	<ul> <li>To continue the replay, click</li> </ul>
	<ul> <li>To increase the replay speed, click</li> </ul>
	<ul> <li>To decrease the replay speed, click ◄</li> </ul>
	<ul> <li>To move to a specific time, drag the time slider</li> </ul>
4	Use the Map Controls to drag, zoom in, zoom out, and reset the Floor Map size.
	Tips
	• Collapse the left-side Playback Options or Asset List panel if you want to access the Asset Details on the right
	<ul> <li>The History tab does not have the Focus or Full Screen tools</li> </ul>
	<ul> <li>See Working with the Map Viewing Tools for map control details</li> </ul>

# 11 – Appendix

This chapter contains supporting information for Trellix Locate.

## 11.1 - Filtering, Sorting, Paging, and Column Control (Track, Alarms, Events, Assets, and Tags Pages)

Several Trellix Locate pages use the same basic methods for filtering, sorting, paging, and column control. This section describes how these work. Any notable differences, such as the need for Building and Floor filters on the Map View tab, are called out in the appropriate chapter.

## 11.1.1 - Find by Filtering - A Track > Table View Tab Example

An example Filter panel for the Table View tab is shown below, with filters that limit the displayed Assets to the following: Office Building 1, Office Floor B, Cardiology (Department), a single Type in the Object Category (Electrocardiographs).

Filters				×
Building		Floor	Department	
Office B	uilding 1	<ul> <li>Office Floor B</li> </ul>	<ul> <li>Cardiology</li> </ul>	·
Category				
Object		▼		
Types				
T IIA	Гурез	Adult/Paediatric Volumetric Pu	Aerosol Tents	Air Compressors
🗌 Alte	ernating Pressure/Flotation	Ambulatory Infusion Pumps	Anaesthesia Machines	Anaesthetic Agent Monitors
🗆 Apn	noea Monitors	Bariatric Products	Beds (specialty)/Rail Guards	BiPAP (Bilevel Positive Airway P
🗌 Bloo	od Pressure Monitors	Blood/Fluid Warmers	Breast Pumps	Cardiac Care Systems
	d Therapy Units	Continuous Passive Motion Dev.	🔲 Controllers, Infusion	APPLY FILTER(S)
🗌 Defa	ault Object Type	Defibrillators	Electrocardiographs	Electrosurgical Generators
Follow th Step	hese steps below to use F Action	Filters on the Table View tab. Oth	her Locate pages will behave sim	ilarly, though some filters may vary.
1	Click Filters.			
2	To filter by Building ar	nd Floor:		
	1. Click All Buildings	, and then select a specific Build	ling.	
	2. When the Floors h	ave been loaded, click All Floors	s, and then select a specific Floor	·
3	To filter by Departmer	nt, click <b>All Departments</b> , and the	en select a specific Department.	
4	To filter by Asset Cate	egory, click <b>All Categories</b> , and t	hen select <b>Object</b> or <b>People</b> .	
5	To limit the selected <b>1</b> Types.	<b>Types</b> under Object or People (th	e default is <b>All Types</b> ), select the	e checkbox beside one or more
6	Click Apply Filters.			
	TIP			
	• ••	ct or People Types, you may nee	d to scroll to see the <b>Apply Filters</b>	button (shown inset in the
7	When filtering by Object example above). To clear one or more f			button (shown inset in the

• Click Clear all Filters to eliminate any filtering

## Example

An example of filtered results on the Table View tab is shown below, including the **X** buttons used to quickly clear a specific filter.

=	Track						LOCATE	
<b>O</b> Track	c		rs				Search	۹
ø	Object	Apnoea Monitors S	Bariatric Products 💿 D	efibrillators 🙁				
Alarms	TABL	E VIEW MAP VIEW	HISTORY					
Event Logs	Refreshee	d Today at 13:14			F	Rows per page: 50	▼ 1 - 2 of 2	< >
Assets	lcon	Name	Asset ID	Asset Type	Tag MAC ID	Last Known Loca	tion	ш
Tags	dip	Circle_23	CA_23	Defibrillators	5F8F0B	B1 > F1 > DD	D	•
Depts.	Ģ	Circle_8	CA_8	Apnoea Monitors	5F9023	B1 > F1 > CC	с	•

## 11.1.2 - Sorting - A Table View Tab Example

The Table View tab supports sorting the Asset list, in ascending or descending order, by Name, Asset ID, Asset Type, and Tag MAC ID. An example, sorted by ascending Asset ID, is shown below.

freshe	d Today at 13:12				•	Rows per page: 50 1 - 50 of 101	< >
on	Name	Asset ID 个		Asset Type 个	Tag MAC 10	Lastixing an Location	
5*	Sashi_Battery	Battery_1		Oxygen Concentrators	264741	Office Building 1 > Office Floor A	0
1	Arjun_Battery	Battery_1	0	Oximeters	270D0C	Office Building 1 > Office Floor A	•
5	Sanjith_Battery	Battery_1	1	Oximeters	264740	Office Building 1 > Office Floor A > RajGeo	0

Follow the steps below to sort the Assets listed on the Table View tab.

Step	Action
1	Hover over the column name. If it is sortable, a $oldsymbol{\Lambda}$ will appear.
2	Click once to sort ascending. A $ {f \Lambda} $ will appear beside the column name.
3	Click the column name a second time to sort descending. A $ullet$ to appear beside the column name.

## 11.1.3 – Paging and Column Control – A Track > Table View Tab Example

The way Assets are listed on the Table View tab can modified. The number of Assets that appear per page can be customized, and the columns that appear can be enabled and disabled.

The example below shows a list with 5 Assets per page, currently displaying Assets 11-15 out of 101 Assets total, and with the Tag MAC ID column hidden.

TAE	BLE VIEW MAP VIEW	HISTORY			
efresh	ed Today at 13:41			Rows per page: 5 - 1	1 - 15 of 101 < 💙
con	Name	Asset ID ↑	Asset Type	Last Known Location	
⊴*	Harman_Battery	Battery_2	Heated Humidifiers	Office Building 1 >	v/Hide Columns
1	Brian_Battery	Battery_3	Cleaning Crew	Office Building 1 > ✓ Ic	on Jame
₽.	Susan_Battery	Battery_4	Air Compressors	Decement Males and	sset ID
<u>-</u>	Raj_Battery	Battery_5	Aerosol Tents	Office Building 1 >  A  > aTest3	sset Type
ē	Srishti_Battery	Battery_6	Lymphedema Pumps	Office Building 1 >	ag MAC ID ast Known Location
					ANCEL APPLY

11.1.4 - Searching - Track > Table View Tab Example

## EXAMPLE

An example search on the Table View tab is shown below, selected for Assets that match "A10

≡	Track					LO	CATE
• Track	C	∓ FILTER Clear All F	ilters			A10	8
ø	Office	Building 1 🔕 Office Flo	or A 🙁 Object 🙁 A	onoea Monitors 🛞 Bariatric F	Products Defibr	illators 🛞	
Alarms	TABI	E VIEW MAP VI	EW HISTORY				
ent Logs	Refreche	d Today at 12:19				Rows per page: 50 💌 1-3 of 3	< >
Ŀ	Renearc	1 roddy at 12.15				1 505	
Assets	lcon	Name	Asset ID	Asset Type 🕇	Tag MAC ID	Last Known Location	
Tags	Ģ	Manu_Button	Button_17	Apnoea Monitors	A10EB7	Office Building 1 > Office Floor A	•
ES Depts.	ō	Jobelle_Button	Button_9	Bariatric Products	A10F4A	Office Building 1 > Office Floor A > RajGeo	•
IJ	dþ	Harman_Button	Button_2	Defibrillators	A10DF7	Office Building 1 > Office Floor A	9
o-Fences							

The Search function works by entering text in the Search box, and then clicking  ${\bf Q}$  or pressing Enter. The following considerations apply:

- Only the Name, Asset ID, and MAC ID fields are searched
- The matching is not case-sensitive, so "apnoea" will match "Apnoea" and "APNOEA"
- Partial matches will be found, so "A10" will match "A10EB7" and "FD4A10"
- The whole search string must match, so "Apnoea Devices" will not match "Apnoea Monitors"

## 11.2 - Default Accounts, Roles, and Permissions

The default user accounts, roles, and permissions provided with Trellix Locate are described below.

Username	Password	Role Assigned	Permissions
Viewer	BXLinx!1	Viewer	The Viewer user has view-only access to the Track, Alarms, Event Logs, and Departments features. The View user also as view-only access to the system-wide Alarms and Events that are visible in Trellix Admin.
Operator	BXRtls!2	Operator	<ul> <li>The Operator user has all Viewer access and can also</li> <li>Create, edit, and delete Object Assets and Departments</li> <li>Create, edit, and delete People Assets and Departments</li> <li>Manage and configure Tags</li> <li>Acknowledge alarms</li> </ul>
Locateman	BXRtls!3	Locate Manager	<ul> <li>The Locate Manager user has all Operator access and can also</li> <li>Configure and manage Geo-Fences</li> <li>Set up Rules</li> </ul>
Admin	BXLinx!5	System Administrator	The System Administrator has full access to all features.
Public	BXLinx!7	Third-Party Integration	The Third-Party Integration user has access to the Published API. <b>Noтe</b> It is not possible to login to the Web user interface with this account.
11.3 – Account 11.3.1 – Locate The Locate per	e Permissions	ted and described below.	tin 23
Permission		Description	
Acknowledge	Alarms	Acknowledge Loca	te alarms
Asset Manage	ement	Create, read, updat	e, and delete Object Assets and Departments
Locate Config	uration	<ul> <li>Configure and ma</li> <li>Set up Rules</li> <li>RTLS configuration</li> </ul>	anage Geo-Fences on (nodes/engine)
People Manag	gement	Create, read, update	e, and delete People Assets and Departments
Tag Managem	nent	Enable, disable, ass	sign, and edit Tags
View Only		<ul><li>View assigned Al</li><li>View Track page</li></ul>	arms and Events (including Map View and History tabs)

## 11.3.2 – Global Permissions

The global Trellix permissions that pertain to Locate are listed and described below.

Permission	Description
Locate API	Access Locate published data using the Application Programming Interface
User Management	Create, view, modify, and delete user accounts
User Role Management	Manage user roles and permissions
System Settings	Modify the system and subsystem networking settings
	<ul> <li>Backup and restore system configuration</li> </ul>
	<ul> <li>Backup and restore the database</li> </ul>
	<ul> <li>Update and manage the system and subsystem software versions</li> </ul>
	<ul> <li>View diagnostic logs components and features</li> </ul>

## 11.4 – Adding and Updating a Trellix Locate License

An example of the Clients page in Trellix Admin is shown below, with the default Lighting license of 1000 devices and a Locate license for 1000 Tags.

=	Client Profile			ADMIN 🔛
Alarms	<b>Client Details</b> System ID : 1dfaae95-6fd5-3dc4-8c	i2e-7bc5e5c6e964 🔲	COPY ID	EDIT
Event Logs	Client Name Default Client Test	Industry HealthCare	۲	
Lusers	Additional Information (opti	onal)		~
Lients	Application Details			+ ADD LICENSE 📀
	LIGHTING 10000 Devices Expiry Date: 18-09-2025		LOCATE 1000 Tags Expiry Date: 01-09-2025	On On
				>
<b>Ф со<u>оре</u>я</b> 13:21				

## Procedure

Follow the steps below to add or update a Trellix Locate License.

## Νοτε

To perform this procedure, you must have System Administrator access to Trellix Lighting (Note this is a Lighting permission, and not a Locate one).

Step	Action
1	Log into Trellix Core with System Administrator access for Trellix Lighting.
2	Click 🇰 , and then click Clients.
3	Click Copy ID beside System ID.
4	Submit your Trellix Locate license request to Cooper, including the System ID and the number of Tags required. Cooper will provide a JSON (.json) license file that is specific to your System ID.
5	When the license file arrives, click <b>+ Add License</b> , then select the JSON license file on your computer, and then click <b>Open</b> to upload it.
6	When the file has uploaded, the new license settings will be applied to your system. If this is the first license submitted, Trellix Locate will also be enabled.

## 11.5 – Troubleshooting

#### 11.5.1 - Location Reporting is Slow or Inaccurate

## Problem

One potential cause for slow or inaccurate location data is network congestion. Review the Events Log in the Trellix Admin app to see if there are "Zigbee network experiencing backlog" entries. If these are being reported often, it indicates that one or more sensors are detecting more Tags than they can report.

## Solution

Increase the individual RSSI Cut-Off settings for the identified sensors as described in *Enabling*, *Disabling*, and *Changing* the Individual Sensor Settings.

#### 11.5.2 - Duplicate Geo-Fence Alarms

## Problem

Duplicate Geo-Fence alarms are generated for Assets that were already inside a Geo-Fence.

## Solution

The Trellix system does not save or track Tag locations when it is offline, for example, when rebooting after a system upgrade. When the system recovers after reboot, it will generate new alarms for Tags located inside Geo-Fences, even if those Tags were already inside the Geo-Fence before rebooting. This is expected behavior for Locate 7.0, 7.1, and 8.0.

Locate /.0, 7.1, and 8.0.

#### FCC Statement

This device complies with Part 15 of the FCC Rules. Operation is subject to the following two conditions:

- (1) This device may not cause harmful interference.
- (2) This device must accept any interference received, including interference that may cause undesired operation.

Note: The grantee is not responsible for any changes or modifications not expressly approved by the party responsible for compliance. Such modifications could void the user's authority to operate the equipment.

Note: The equipment has been tested and found to comply with the limits for a Class B digital device, pursuant to part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference in a residential installation. This equipment generates uses and can radiate radio frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in a particular installation. If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encouraged to try to correct the interference by one or more of the following measures:

- Reorient or relocate the receiving antenna.
- Increase the separation between the equipment and receiver.
- Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
- Consult the dealer or an experienced radio/TV technician for help.

This device complies with FCC radiation exposure limits set forth for an uncontrolled environment. This equipment must be installed and operated in accordance with provided instructions and the antenna(s) used for this transmitter must be installed to provide a separation distance of at least 20 cm from all persons.

## Warranties and Limitation of Liability

Please refer to www.cooperlighting.com/WarrantyTerms for our terms and conditions.

## Garanties et limitation de responsabilité

Veuillez consulter le site www.cooperlighting.com/WarrantyTerms pour obtenir les conditions générales.

## Garantías y Limitación de Responsabilidad

Visite www.cooperlighting.com/WarrantyTerms para conocer nuestros términos y condiciones.



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