# 



# *Company Name*

*Street Address*

*City, State, Zip*

*Name*

PHONE: (xxx) xxx-xxxx

FAX: (xxx) xxx-xxxx

EMAIL : xxx@xxx.com

WEBSITE : www.xxx.com

**i-Vu Server**

**Training Agenda**

**Date/Time/Location**

**Attendee Sign In**

**Logging into the i-Vu: URL http://\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**System Setting**

**Changing user name and password: User\_\_\_\_\_\_\_\_\_\_\_\_Password\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Adding users and setting authorities**

**System date and time**

**Navigating the Help Function**

**Locations**

**Understanding the tree**

**Modifying the tree (advanced admin access required)**

**Selecting a location**

**Selecting a locations equipment**

**Using the graphics to determine operation**

**Setpoints**

**Adjusting occupied setpoints**

**Adjusting unoccupied setpoints**

**Adjusting Demand Limiting Setpoints (advanced demand limiting required)**

**Schedules**

**Creating new schedules**

**Modifying schedules**

**Verifying schedules**

**Creating schedule groups**

**Trending**

**Setting up trending groups**

**Viewing existing trends**

**Saving trend information**

**Reports**

**Report types**

**Running reports**

**Saving reports**

**Alarms**

**Viewing alarms**

**Acknowledging alarms**

**Deleting alarms**

**Emailing alarms**

**Questions & answers session**

**Meeting was attended by:**



**To use the checkboxes in word, you must lock the form by:**

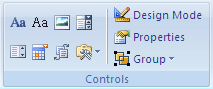
To check off the items by clicking in the check boxes, you need to lock the form. However, when the form is locked, you will not be able to make changes to the text or layout, so be sure to do this step last.

**Note** If you want to check the spelling in your list, you must run spell check on the document before you lock the form.

When you want to edit the document, you can easily unlock the form. Just remember to lock it again so that you will be able to click the check boxes.

**Lock the form**

1. Make sure that you are not in design mode by clicking **Design Mode** in the **Controls** group on the **Developer** tab.



1. On the **Developer** tab, in the **Protect** group, click **Protect Document**, and then click **Restrict Formatting and Editing**.
2. In the **Protect Document** task pane, under **Editing restrictions**, select the **Allow only this type of editing in the document** check box.
3. In the list of editing restrictions, select **Filling in forms**.
4. Under **Start enforcement**, click **Yes, Start Enforcing Protection**.
5. To assign a password to the document so that only reviewers who know the password can remove the protection, type a password in the **Enter new password (optional)** box, and then confirm the password.

**Important** If you choose not to use a password, all reviewers can change your editing restrictions.

**Unlock the form**

1. On the **Developer** tab, in the **Protect** group, click **Protect Document**, and then click **Restrict Formatting and Editing**.
2. In the **Protect Document** task pane, click **Stop Protection**.