



CopperCube and Kaizen Initial Set-up

Please fill out this form completely and accurately. This information is critical to successfully setting up your CopperCube and Kaizen accounts.

Client Information:

Please note that without this information, CopperTree cannot configure your CopperCube and Kaizen accounts. The client information will be used to add an administrator account on Kaizen, who will be responsible for administering your CopperCube and users.

1. Client Name: _____
2. Address: _____

 Province/State: _____ Country: _____
 Postal Code: _____

A Kaizen account will be set up with the following user(s) as the administrator(s). *(Repeat for other admin users)*

	Name and Position	Phone number	Email
First Admin			
Second Admin			

Kaizen building information:

Please list the building names and building device ranges below. This information is essential for setting up your Kaizen account.

1. Building Name: _____ Total Floor Area: _____
2. Building Name: _____ Total Floor Area: _____
3. Building Name: _____ Total Floor Area: _____
4. Building Name: _____ Total Floor Area: _____
5. Building Name: _____ Total Floor Area: _____

(In those cases where there are more than five buildings, please list the remaining building names and device ranges at the end of this form, under the title 'Kaizen building information')

CopperCube-BACnet Connection: (copy the remaining two pages and complete the information as needed, for each site)

1. Information for CopperCube setup:

This information helps the CopperCube to be assigned to a site, which in this context means a connection to a BACnet network, and the BACnet Device number will help it to communicate with the other devices in the network.

- a. Serial Number of the CopperCube: _____
- b. Physical location of the CopperCube: _____
- c. Site name (a short unique name for identification): _____
(Less than 10 characters, no spaces or symbols. Please note that the 'Site name' used while configuring your CopperCube and Kaizen accounts must match each other.)
- d. CopperCube BACnet Device number to use: _____

2. Choose one of the following as your CopperCube - BACnet connection methods:

Ethernet Configuration: No configuration info. Needed

Regular IP Configuration:
Address: _____

Foreign IP Configuration:
Address: _____
BACnet Broadcast Management Device (BBMD) Address: _____
BBMD Port: _____ (Default: 47808)
BBMD Username: _____
BBMD Password: _____

3. Device range information:

- a. Data Acquisition Device Ranges: _____
(Inclusion Range - These are device ranges of the devices for which you wish to collect Trend Log data)

- b. Typical device exclusion list: Historian, Operator Work Station (OWS), enteliWEB and any other devices you want to be excluded from Kaizen.

Excluding these devices will make the data transfer from CopperCube to Kaizen more efficient, avoiding wasted bandwidth and effort to delete unneeded data.

Note: The exclusion list is entered as a BACnet device number or range e.g. 1239, (0 – 50)

Historian: _____

OWS: _____

enteliWEB: _____

Other devices: _____

- 4. Trend Log (TL) to archive: _____

If you have more Trend Logs than your CopperCube license, please note that you will have to exclude Trend Logs or upgrade your CopperCube license.

- 5. Note: You may want to take photos of the physical location of the CopperCube for future reference.

- 6. Use the space below to capture any other relevant information from your site visit