



User Guide

# Tracer Concierge™ System for Small Buildings

Pre-Packaged Control Panel and Display



X39641274001

Please retain this document for future reference.

## **⚠ SAFETY WARNING**

Only qualified personnel should install and service the equipment. The installation, starting up, and servicing of heating, ventilating, and air-conditioning equipment can be hazardous and requires specific knowledge and training. Improperly installed, adjusted or altered equipment by an unqualified person could result in death or serious injury. When working on the equipment, observe all precautions in the literature and on the tags, stickers, and labels that are attached to the equipment.

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TRANE  
TECHNOLOGIES





# Introduction

Read this manual thoroughly before operating or servicing this unit.

## Warnings, Cautions, and Notices

Safety advisories appear throughout this manual as required. Your personal safety and the proper operation of this machine depend upon the strict observance of these precautions.

The three types of advisories are defined as follows:

 <b>WARNING</b>	Indicates a potentially hazardous situation which, if not avoided, could result in death or serious injury.
 <b>CAUTION</b>	Indicates a potentially hazardous situation which, if not avoided, could result in minor or moderate injury. It could also be used to alert against unsafe practices.
<b>NOTICE</b>	Indicates a situation that could result in equipment or property-damage only accidents.

## Important Environmental Concerns

Scientific research has shown that certain man-made chemicals can affect the earth's naturally occurring stratospheric ozone layer when released to the atmosphere. In particular, several of the identified chemicals that may affect the ozone layer are refrigerants that contain Chlorine, Fluorine and Carbon (CFCs) and those containing Hydrogen, Chlorine, Fluorine and Carbon (HCFCs). Not all refrigerants containing these compounds have the same potential impact to the environment. Trane advocates the responsible handling of all refrigerants-including industry replacements for CFCs and HCFCs such as saturated or unsaturated HFCs and HCFCs.

## Important Responsible Refrigerant Practices

Trane believes that responsible refrigerant practices are important to the environment, our customers, and the air conditioning industry. All technicians who handle refrigerants must be certified according to local rules. For the USA, the Federal Clean Air Act (Section 608) sets forth the requirements for handling, reclaiming, recovering and recycling of certain refrigerants and the equipment that is used in these service procedures. In addition, some states or municipalities may have additional requirements that must also be adhered to for responsible management of refrigerants. Know the applicable laws and follow them.

 <b>WARNING</b>
<b>Proper Field Wiring and Grounding Required!</b> Failure to follow code could result in death or serious injury. All field wiring MUST be performed by qualified personnel. Improperly installed and grounded field wiring poses FIRE and ELECTROCUTION hazards. To avoid these hazards, you MUST follow requirements for field wiring installation and grounding as described in NEC and your local/state electrical codes.

**⚠ WARNING****Personal Protective Equipment (PPE) Required!**

Failure to wear proper PPE for the job being undertaken could result in death or serious injury. Technicians, in order to protect themselves from potential electrical, mechanical, and chemical hazards, **MUST** follow precautions in this manual and on the tags, stickers, and labels, as well as the instructions below:

- Before installing/servicing this unit, technicians **MUST** put on all PPE recommended for the work being undertaken. **ALWAYS** refer to appropriate MSDS sheets and OSHA guidelines for proper PPE.
- When working with or around hazardous chemicals, **ALWAYS** refer to the appropriate MSDS sheets and OSHA guidelines for information on allowable personal exposure levels, proper respiratory protection, and handling recommendations.
- If there is a risk of arc or flash, technicians **MUST** put on all PPE in accordance with NFPA 70E or other country-specific requirements for arc flash protection, **PRIOR** to servicing the unit.

**⚠ WARNING****Follow EHS Policies!**

Failure to follow instructions below could result in death or serious injury.

- All Trane personnel must follow the company's Environmental, Health and Safety (EHS) policies when performing work such as hot work, electrical, fall protection, lockout/tagout, refrigerant handling, etc. Where local regulations are more stringent than these policies, those regulations supersede these policies.
- Non-Trane personnel should always follow local regulations.

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## Revision History

- Updated Cover Page to Tracer Concierge™ System for Small Buildings Pre-Packaged Control Panel and Display.
- Updated Navigating Tracer Concierge to Navigating Tracer 10-inch Display Occupant View chapter.
- Updated Tracer Concierge to Tracer Concierge System.
- Updated Downloading and Installing the BAS Occupant Mobile Application chapter.
- Updated Navigating Tracer 10-inch Display Occupant View chapter.
- Running edits.



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# Overview

The Tracer Concierge System for Small Buildings is a cost-effective solution that makes day-to-day operation of your HVAC and lighting systems easier. A bundled system of pre-engineered applications means you get advanced capabilities for building management with less risk. With built-in functionality, including overrides, temperature setpoint changes, and daily monitoring, the Tracer Concierge System is flexible and easy to use.

Tracer Concierge System information can be accessed in two ways:

- The Tracer 10-inch display is a touch screen that allows you to manage your building from a single location.
- The Trane BAS Occupant mobile app, available for both Apple and Android, allows you to manage your building from your smart phone, tablet, or other mobile device. For instructions on how to install the mobile app, see [“Downloading and Installing the BAS Occupant Mobile Application,” p. 18](#)

## Navigating Tracer 10-inch Display Occupant View

The main screen of the Tracer 10-inch display shows the Occupant View. The Occupant View provides a snapshot of all the zones in your building. To navigate throughout the Occupant View, touch the menu icon in the upper left of the screen. The main menu displays.

**Figure 1. Menu**



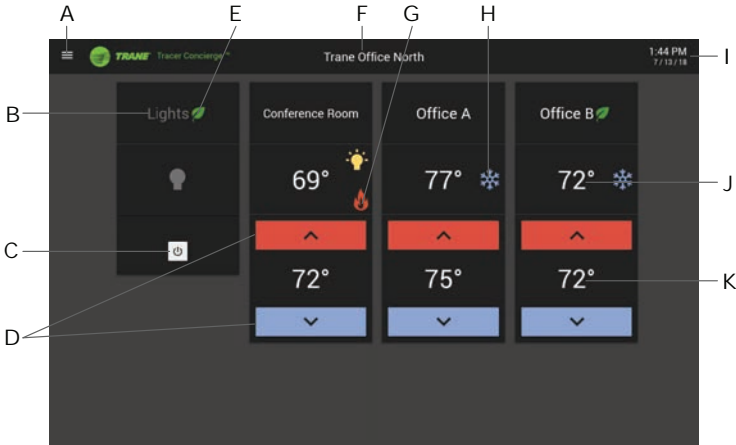
Menu elements include:

- **Occupant View:** provides access to your zones.
- **Schedules:** a list of all schedules displays. Tap a schedule name to view or edit the schedule.
- **Alerts:** access to a list of active critical and service required alarms.
- **Graphics:** access to your custom graphic(s) for the system (optional).
- **Technician Tools:** access advanced settings. Intended for technician use only.
- **Settings:** modify your device settings.
- **Help:** includes language selections, contact information for you local Trane office, quick start videos, and alerts.

# Managing Zones

The main screen provides an overview of all the zones in Tracer Concierge System. The first five zones are displayed. Swipe left to view additional zones, if applicable.

**Figure 2. Main screen**



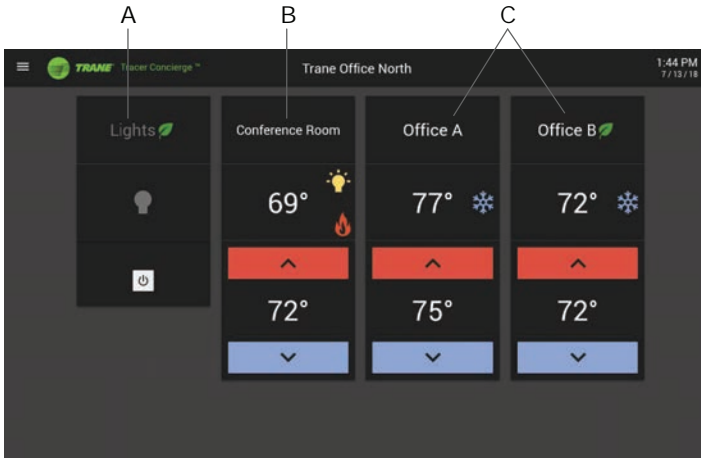
Element	Description
A	Menu: tap the menu to access schedules, settings, and help
B	Zone name
C	Power button to turn on the lights for the zone
D	Up and down arrows that allow you to adjust the setpoint for the zone
E	Energy Saving icon: indicates that the system is saving energy in this space
F	Building name
G	Flame: indicates the zone is in heating mode
H	Snowflake: indicates the zone is in cooling mode
I	Date and time of the Tracer controller system
J	The current temperature of the zone
K	Setpoint for the zone, which is the desired temperature

## Zone Types

There are three types of zones in the Tracer Concierge System:

- **HVAC only:** controls HVAC equipment for a specific area. In the [Figure 3](#), Conference Room, Room A, and Room B are HVAC only zones, as indicated with up and down arrows for the setpoint.
- **HVAC and Lighting:** controls both HVAC equipment and lighting for a specific area. In [Figure 3](#), Office is an HVAC and lighting zone, as indicated by the light bulb and setpoint with up and down arrows.
- **Lighting only:** controls the lighting for a certain area. In [Figure 3](#), Parking Lot Lights is a lighting only zone, as indicated by only a light bulb.

**Figure 3. Zone examples**

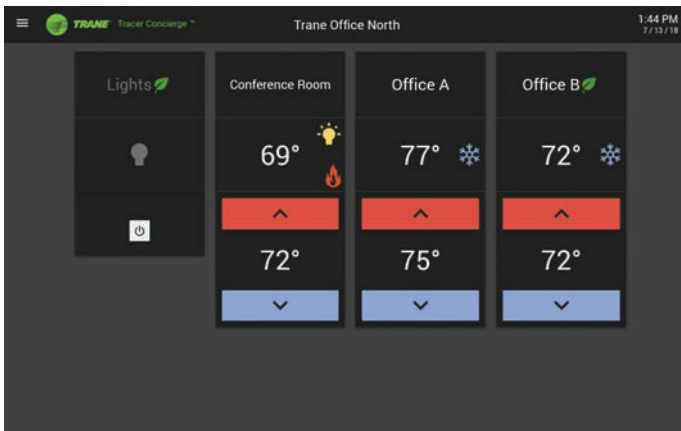


Element	Description
A	Lighting only zone
B	HVAC and lighting zone
C	HVAC only zone

### Changing a Setpoint

If an area is too hot or too cold, you can adjust the setpoint for its zone. On the main screen, tap the up or down area for the desired zone. If the up and down arrows are disabled, the setpoint cannot be adjusted.

**Figure 4. Changing a setpoint**



## Managing Zones

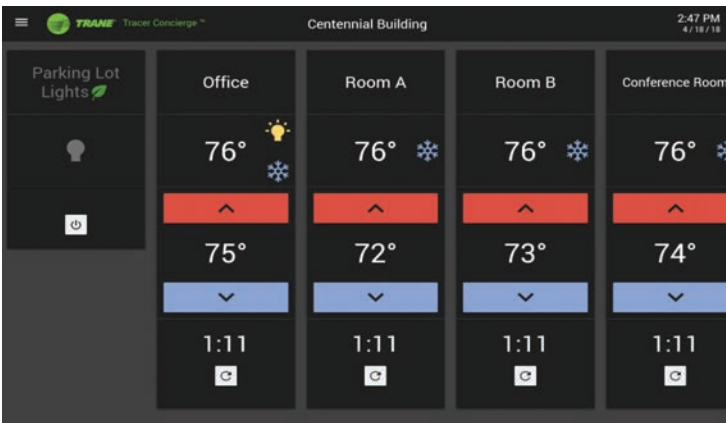
### Turning On Heating, Cooling, or Lighting

The Tracer Concierge System uses operating-hours schedules to use less energy when a building is not in use. For example, if a business is closed after 5 pm, the lights are turned off and the temperature is set higher in the summer or lower in the winter for energy conservation.

If you will be staying in the building after hours, you can enable the system so that the lights stay on and the temperature stays comfortable:

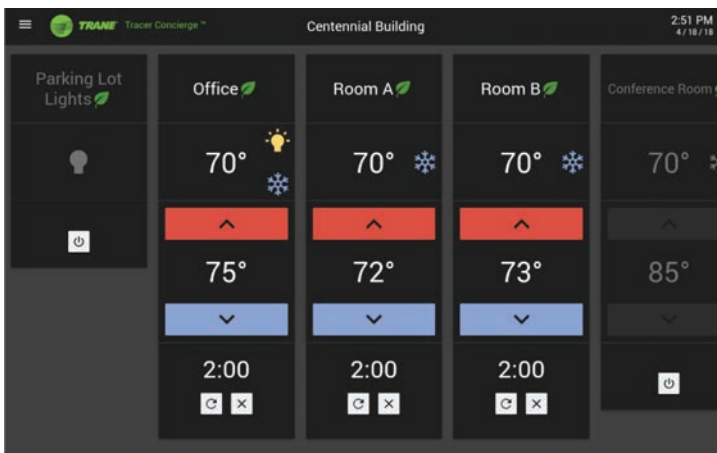
1. Towards the end of the day, a timer appears on the screen indicating how long until the schedule ends. This shows when the temperature will start to change and when the lights will turn off (if a light bulb displays next to the temperature).

**Figure 5. Timer indicating when schedule ends**



2. Tap the arrow button to extend operating hours by two hours.

**Figure 6. Extended operating hours**



3. To cancel or to turn off systems before the time runs out, tap the **X**.



## Managing Schedules

If you arrive in the building outside of operating hours, for example earlier in the morning than typical.

1. Tap the power button to enable the system. The lights will come on (if setup), the fans will start, and the temperature will start to change to the normal temperature.
2. If the typical operating hours start within two hours, no additional steps are necessary. If typical operating hours do not start within two hours, you will need to tap the reset arrow to add additional time.

## Managing Schedules

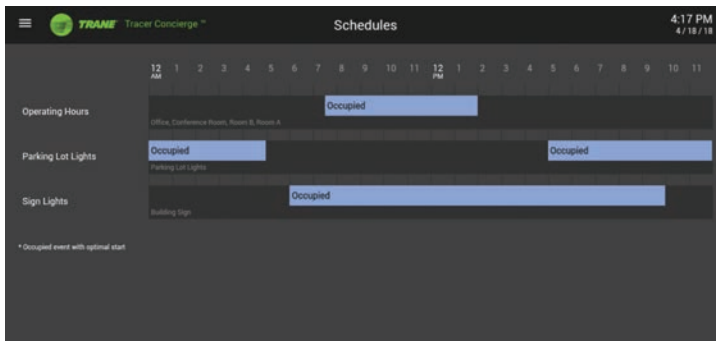
Schedules can control HVAC, HVAC and lighting, or lighting only. The typical operating hours schedule can be adjusted from the 10-inch display.

### Viewing Schedules

#### All Schedules

To view all schedules, tap **Schedules** on the main menu.

**Figure 7. All schedules**



To view individual schedules:

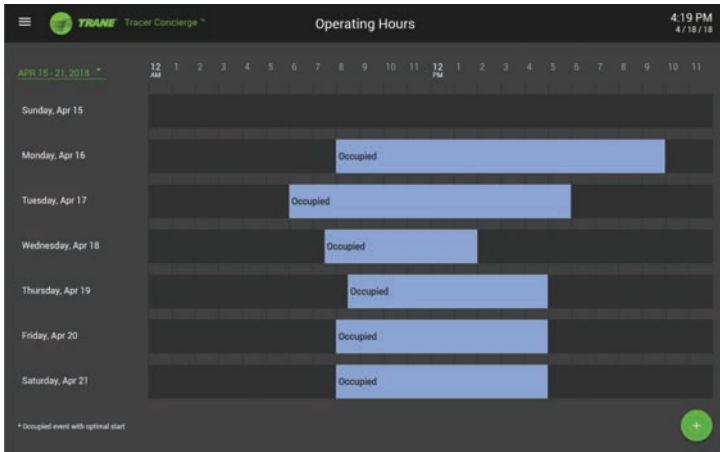
- On the all schedules page, tap the schedule name (for example, Operating Hours or Parking Lot Lights).
- Or individual schedules are listed on the main menu. Tap the schedule name to view an individual schedule.

Schedules that use the term “occupied” to indicate when the system is scheduled to control the temperature or lights. The blue bar indicates occupied periods. If configured for lights as well, the lights will be on during occupied periods.

In this example, Operating Hours, the schedule indicates the hours when the building will typically be in use or occupied.

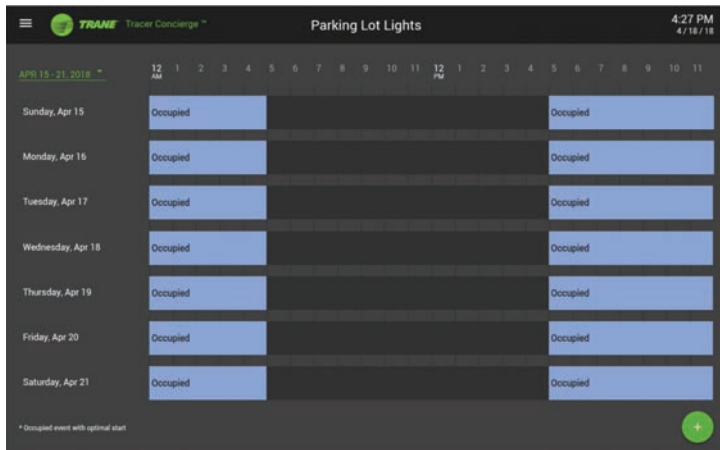
## Managing Schedules

**Figure 8. Operating hours schedule**



In this example, Parking Lot Lights, the schedule indicates when the lights in the parking lot should be turned on. The blue bar shows when the lights are on or occupied.

**Figure 9. Parking lots light schedule**

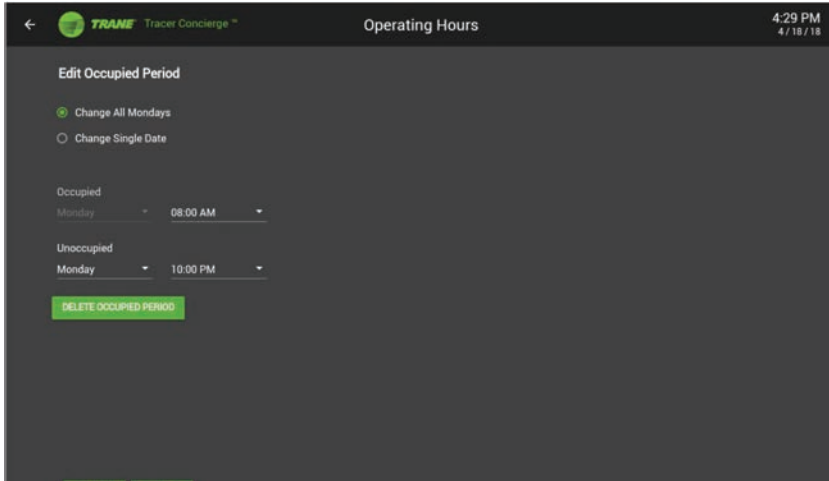


## Changing Schedules

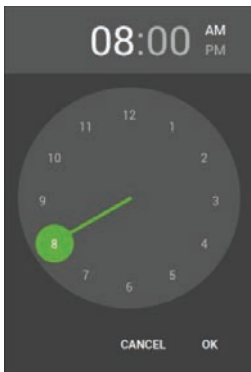
### Edit Schedules

To change a schedule:

1. Go to the weekly view of a schedule by either selecting the schedule from the menu or tapping on the schedule name on the all schedules screen.
2. Tap the occupied bar to edit the occupied period.

**Figure 10. Edit occupied period**


3. Select:
  - **Change All** (day of the week) to update the operating hours schedule going forward for that particular day of the week.
  - **Change Single Date** to change the schedule for just a single day.
4. Select the day of the week or date to change.
5. Update the Occupied Hours.

**Figure 11. Occupied hours**


6. Tap **Save**.

### Add Occupied Period

To add a new occupied period to a schedule:

1. Go to the weekly view of a schedule by either selecting the schedule from the menu or tapping on the schedule name on the all schedules screen.
2. Tap the red + sign in the bottom right of the screen.

## Custom Graphics

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3. Select:
  - **Change All** (day of the week) to update the operating hours schedule going forward for that particular day of the week.
  - **Change Single Date** to change the schedule for just a single day.
4. Select the day of the week or date to change.
5. Update the Occupied Hours.
6. Tap **Save**.

## Custom Graphics

Graphics may be customized for your building. View custom graphics by selecting the graphic name from the menu. Contact your local Trane office for assistance with optional custom graphics.

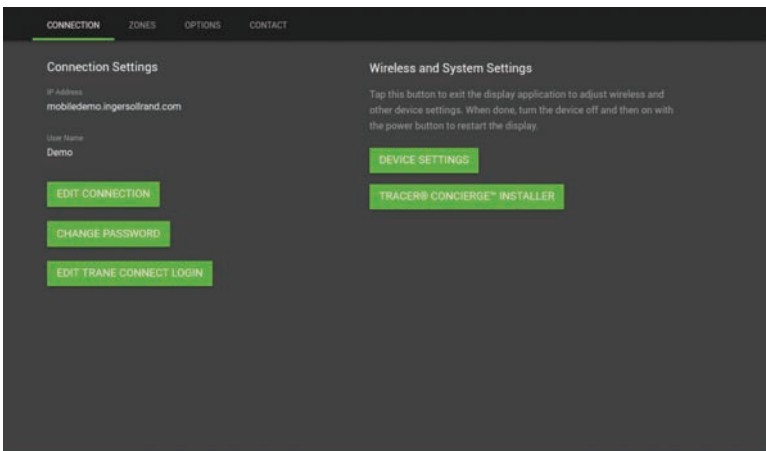
## Settings

Settings allows you to view or modify System Controller connection settings, Zone configuration, display options, and contact information. To access Settings, from the menu, tap **Settings**.

### Connecting to the System Controller

The connection tab displays System Controller Connection Settings that were set during the initial Tracer Concierge System installation.

**Figure 12. Connection tab**



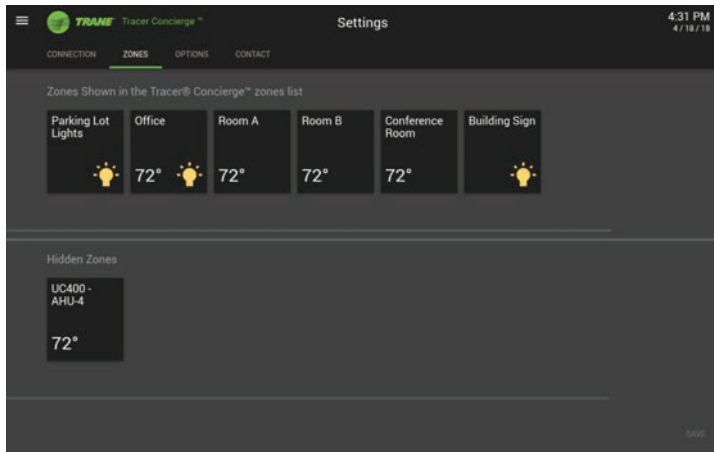
# Configuring Zones

*\*Only available on the Tracer 10-inch display and is not available on the Trane BAS Occupant App.*

The Zones tab allows you to configure what is displayed on the main screen.

1. Drag zones to the top row that you want to display on the main screen. Drag zones to reorder the zones. Zone are shown in the order that you place them.
2. To hide zones from the display, drag them to the second row.
3. Tap **Save** to save your changes and update the main screen.

**Figure 13. Zone tab**



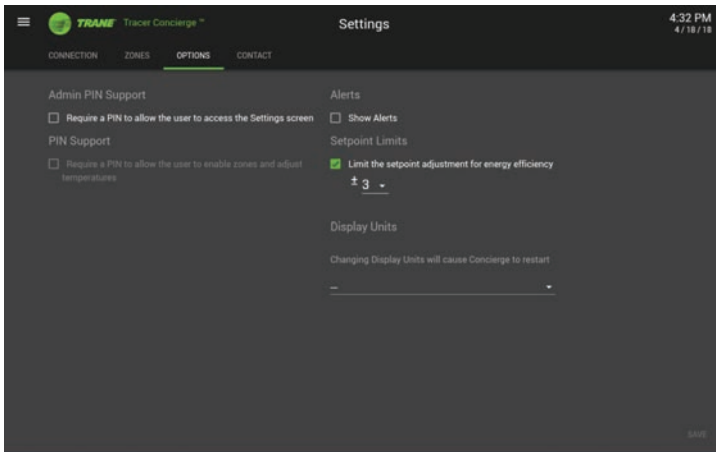
## Optional Settings

*\*Only available on the Tracer 10-inch display.*

The Options tab allows you to:

- Set an Admin pin that allows access to the Settings screen.
- Set a PIN to allows users to enable zones and adjust temperatures.
- Enable Alert notifications.
- Enable Setpoint Limits to limit setpoint adjustment for energy efficiency.

**Figure 14. Options tab**



### PIN Support

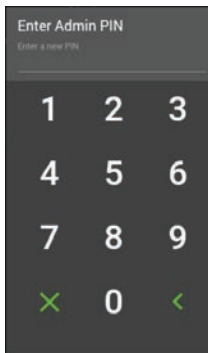
The Tracer 10-inch Display allows you to set two PIN numbers.

- **Admin PIN Support** requires users to enter the Admin PIN to view or modify System Controller connection settings, Zone configuration, display options, and contact information.
- **PIN Support** requires users to enter the PIN to enable zones and adjust temperatures.

#### To enable Admin PIN Support:

1. Tap **Require a PIN to allow the user to access the Settings Screen**.
2. Enter a **PIN**.

**Figure 15. PIN support**



3. Re-enter the PIN.
4. Tap **SAVE**.

**To enable PIN support for users:**

1. Tap **Require a PIN to allow the user to enable zones and adjust temperatures**.
2. Enter a **PIN**.
3. Re-enter the PIN.
4. Tap **SAVE**.

**Note:** If you forget your PIN number, contact your Local Trane Office for assistance.

**Alerts**

Tap **Show Alerts** to display alerts in the system.

**Setpoint Limits**

Setpoint Limits is an optional setting that prevents users from increasing or decreasing a setpoint more than the selected range. The default is three degrees. Once the setpoint limit is reached, the setpoint up and down arrows are disabled. The setpoint limit applies to the main screen zones. It does not apply to any custom graphics.

To enable Setpoint Limits:

1. Tap **Limit the setpoint adjustment for energy efficiency**.
2. Select a setpoint range of one to nine degrees. The default range is three degrees.
3. Tap **SAVE**.

## Help

The Help menu allows you to:

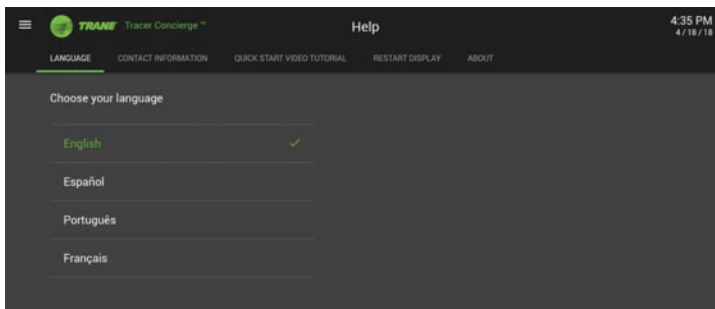
- Change your Language setting
- View contact information for the person or office to contact if you have issues with the Tracer Concierge System
- View video tutorials
- View alerts for the Tracer 10-inch display

## Language

Tracer 10-inch display supports four languages: English, Spanish, Portuguese, and French. To change your language selection:

1. Tap the **Language** tab.
2. Tap the appropriate language.

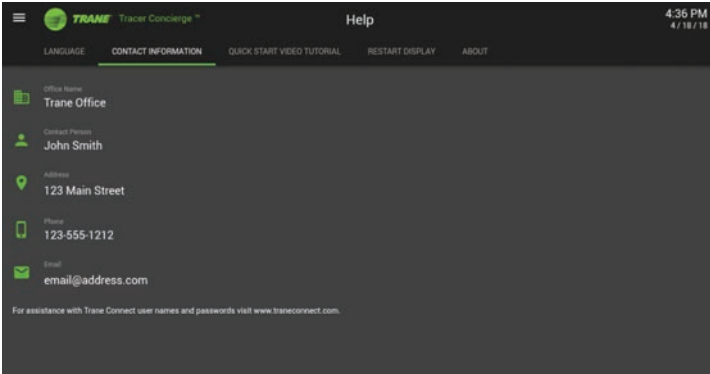
**Figure 16. Language tab**



## Contact

The Contact tab provides contact information.

**Figure 17. Contact tab**



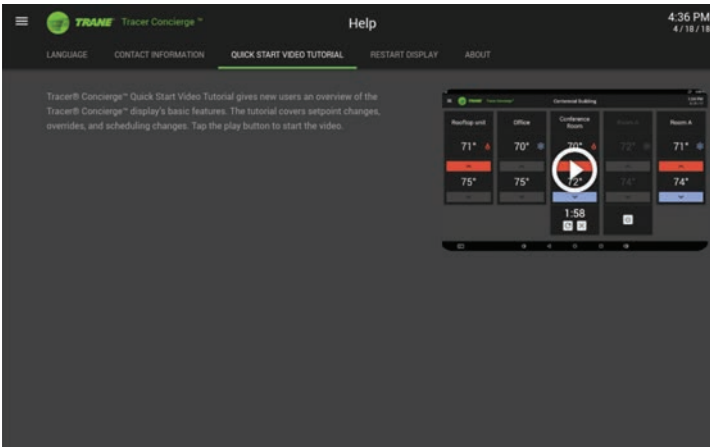
To update contact information:

1. Tap in the appropriate box. Update the contact information.
2. Tap **Save**.

## Video Tutorials

The Quick Start Video Tutorial demonstrates key features of the Tracer 10-inch display. Tap the triangle button to view the video.

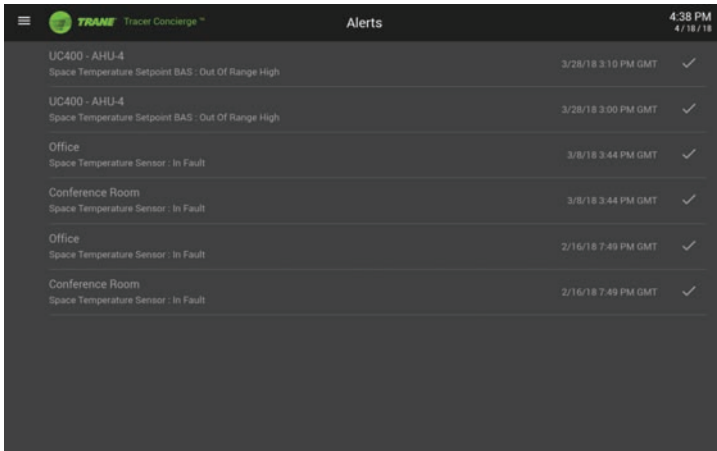
**Figure 18. Video tutorial**



## Alerts

When an abnormal or critical operating condition is detected in your building, a red alarm icon is displayed in the upper right corner of the screen. The Alert tab provides details of the alert.



**Figure 19. Alert tab**


When an alert occurs:

1. On the Help menu, tap the **Alerts** tab.
2. Notify the person listed as the contact of the alert.
3. Provide the details of the alert as displayed on the Alert tab.
4. To clear the alert icon from the screen, click the green check mark.

## Restart Display

*\*Only available on the Tracer 10-inch display.*

To restart the display:

1. On the Help menu, tap the **Restart Display** tab.
2. Tap **Restart Display**.

**Note:** *No data will be lost during the restart, and heating and cooling operations will not be impacted.*



## Downloading and Installing the BAS Occupant Mobile Application

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# Downloading and Installing the BAS Occupant Mobile Application

This section describes how to locate, download, and install the BAS Occupant app for Apple® mobile devices and Android™ mobile devices.

These instructions assume your system is set up for remote access either through a direct network connection or Trane Connect remote access. Trane Connect remote access is a pre-engineered, secure remote access IT technology that provides a standard and secure way to access a Tracer Concierge system when outside of your network.

If your system was configured to use Trane Connect, you will receive an email with instructions for creating a password. If you have trouble accessing your system remotely, please contact your installer.

### Apple Mobile Devices

BAS Occupant app is available free from the Apple App Store. It is compatible with iPhone, iPad, and iPod devices using iOS version 9 or 10. If your mobile device is using a different version, the app may not operate as expected.

Using your mobile device, follow these instructions to download and install the mobile app:

1. Tap the App store icon on your mobile device, which opens the Apple App Store.
2. In the search field, enter Trane, which will display a list of related apps.
3. Select the BAS Occupant app. This is the free Apple App Store page for the app.
4. Tap **Install App**. The installation process begins.

### Android Mobile Devices

BAS Occupant app is available free from the Google Play store. It is compatible with smartphones and tablets using Android operating systems V10.0 and up. If your device is using a different version, the app may not operate as expected.

Using your mobile device, follow these instructions to download and install the app:

1. Tap the App Store icon, which opens the Google Play Store.
2. In the search field, enter Trane, which will display a list of related apps.
3. Select the BAS Occupant app. This is the free Google Play Store page for the app.
4. Tap **Install**.
5. Tap **Accept and Download**. The installation process begins.

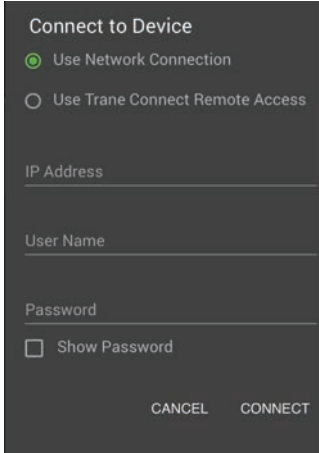
## Downloading and Installing the BAS Occupant Mobile Application

### Connecting the App Using a Network Connection

To connect the BAS Occupant app to your Tracer Concierge System:

1. **Use Network Connection** is selected by default.

**Figure 20. Network connection**



2. Enter the **IP Address** or host name of the Tracer System controller.
3. Enter your **User Name**.
4. Enter your **Password**.
5. Tap **Connect**.
6. The app will restart and connect.

## Downloading and Installing the BAS Occupant Mobile Application

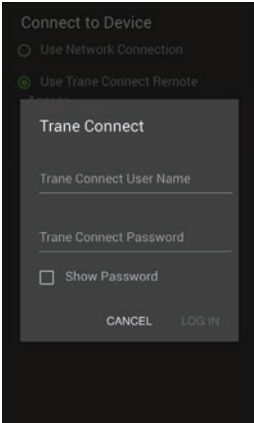
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### Connecting to the App using Trane Connect

To connect the BAS Occupant app to your Tracer System Controller:

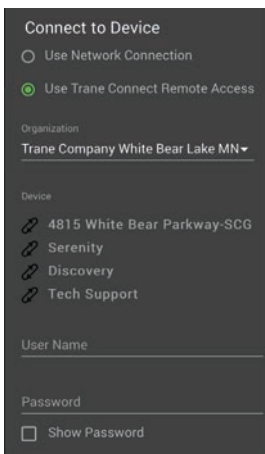
1. Tap **Use Trane Connect**. A pop-up window appears.
2. Enter your Trane Connect **User Name** (e-mail address).
3. Enter your Trane Connect **Password**.
4. Tap **Log In**.

**Figure 21. Trane connect Log In**



5. If you have access to more than one organization select the appropriate organization from the Organization drop down menu.
6. If you have access to more than one controller, select the one you wish to connect to.

**Figure 22. Connect to controller**



7. Enter your **Controller User Name**.

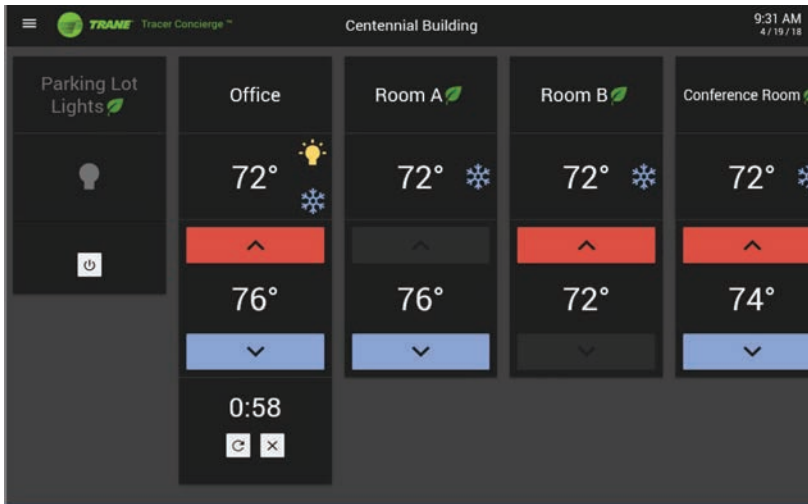
8. Enter your **Password**.
9. Tap **Connect**.
10. The app will restart and connect.

## Troubleshooting

### Why are the arrows disabled on a zone?

If Setpoint Limits are enabled, you can only change a setpoint by a set number of degrees (three by default). Once this limit is reached, the up and down arrows are disabled for that zone.

**Figure 23. Setpoint limit reached**



### What if the zone override button is not available?

This can be caused by:

- The zone is already on (occupied). The override button appears when the zone is unoccupied or when the zone will go unoccupied in less than two hours (for example, at the end of the work day).
- Something else is controlling the zone off (unoccupied) at a higher priority than the display controls. This would need to have been set from within the System Controller web interface.

### Can I cycle power for the display without unplugging it?

Yes. The power button is located on the back of the display. Press the power button to cycle power to the display.

**Figure 24. Back of the display**

Power button

**I forgot my PIN number. How can I reset it?**

Contact your Local Trane Office for assistance.

**I see dashes on the display instead of temperatures.**

If communication loss occurs between the System Controller and the display, or between System Controller and the unit controllers, some elements of the screen may disappear temporarily and/or the display may restart. When this occurs, in addition to troubleshooting the communication loss, press the power button to restart the display.



Trane - by Trane Technologies (NYSE: TT), a global climate innovator - creates comfortable, energy efficient indoor environments for commercial and residential applications. For more information, please visit [trane.com](http://trane.com) or [tranetechnologies.com](http://tranetechnologies.com).

Trane has a policy of continuous product and product data improvement and reserves the right to change design and specifications without notice. We are committed to using environmentally conscious print practices.

BAS-SVU031J-EN 14 Aug 2020  
Supersedes BAS-SVU031H-EN (Aug 2018)

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