User's Guide

INSIGHT Remote Monitoring

Rev B, 10 May 2024

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Document Revision History	
Revision A: 28 December 2016 Revision B: 10 May 2024	
Changes	**Sections Affected**
Initial release	
EA*Pro*-GTWY Device sharing Device UI Sensor UI	

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Preface

The INSIGHT remote monitoring platform provides access to the EA800-ip and the EA*Pro*® Gateway ("EA*Pro*-GTWY") to monitor sensors, log sensor data, notify users of alert conditions, track user responses to alerts, and schedule reports.

Intended Audience

This guide is intended for INSIGHT resellers, customers, and users who are responsible for administrating and monitoring Winland devices.

Devices

A device refers to a Winland EA800-ip or the EA*Pro*-GTWY. For more details on each of the devices, reference the manual for your device.

- EA*Pro*-GTWY: **http://manual.eapro.winland.com**
- EA800-ip: **http://manual.ea800-ip.winland.com**

NOTE

The EA800-ip is a discontinued product. Winland recommends replacing the EA800-ip with the EA*Pro*-GTWY.

What Is in This Guide

This guide is organized into the following chapters:

- **Chapter 1**, Overview summarizes the remote monitoring, remote management, and reporting features of INSIGHT.
- **Chapter 2**, Getting Started describes how to obtain an INSIGHT account, establish an Internet connection through the device, and log into the INSIGHT host server.
- **Chapter 3**, Monitoring Devices describes how to use the dashboard to monitor your devices and sensors, including how to acknowledge sensor readings and respond to alert conditions.
- **Chapter 4**, Account Administration describes how to use the account tree to manage customer accounts, users, devices, **device sharing**, sensors, locations, and groupings.

- **Chapter 5**, Managing Reports describes how to create and schedule sensor log reports and alert reports.
- **Chapter 6**, Managing Profiles describes the use of profiles to notify users of alert conditions and guide users in responding to alert conditions.

Related Materials

The following documents are referenced in this guide:

- **EA800-ip Quick Start Guide**
- **EA800-ip Installation/Owner's Manual**
- **EA*Pro*-GTWY Quick Start Guide (QSG)**
- **EA*Pro*-GTWY Manual**

EnviroAlert documents can be found at **https://winland.com/resources/product-documentation/**. For information about industry and government environmental monitoring requirements, see the following links:

Vaccine Storage & Handling Toolkit, Centers for Disease Control and Prevention, **https://www.cdc.gov/vaccines/hcp/admin/storage/toolkit/storage-handling-toolkit.pdf**

CFR Title 21, Chapter 1, Part 11, Electronic Records; Electronic Signatures; **http://www.accessdata.fda.gov/scripts/cdrh/cfdocs/cfcfr/CFRSearch.cfm?CFRPart=11** or **https://www.ecfr.gov/**

Part 11, Electronic Records; Electronic Signatures — Scope and Application; **http://www.fda.gov/RegulatoryInformation/Guidances/ucm125067.htm**

Documentation Conventions

This guide uses the following documentation conventions:

- NOTE provides additional information.
- **CAUTION** without an alert symbol indicates the presence of a hazard that could cause damage to equipment or loss of data.
- ⚠ **CAUTION** with an alert symbol indicates the presence of a hazard that could cause minor or moderate injury.
- ⚠ **WARNING** indicates the presence of a hazard that could cause serious injury or death.
- ⚠ **DANGER** indicates the presence of a hazard that will cause serious injury or death.

- Text in **blue** font indicates a hyperlink (jump) to a figure, table, or section in this guide, and links to external site, such as websites are shown in underlined **blue**. For example:
  - **Table 4-1** lists permissions for INSIGHT.
  - For more information, visit **www.winland.com**
- Text in **bold** font indicates user interface elements such as menu items, buttons, check boxes, or column headings. For example:
  - On the EA*Pro*-GTWY, to view the serial number of your device from the User Interface (UI): Press the **Gear Icon**, press **Main Menu**, press **About**, and then press **Confirm**.
  - Under **Data Logs**, select the **Notifications** option.
- Key names and keystrokes are indicated with **UPPERCASE**:
  - Press **CTRL+P**.
  - Press the **UP-ARROW** key.
- Text in *italics* indicates terms, emphasis, variables, or document titles. For example:
  - For a complete listing of license agreements, refer to the *Software End User License Agreement*.
  - What are *shortcut* keys?
  - To enter the date type *mm/dd/yyyy* (where *mm* is the month, *dd* is the day, and *yyyy* is the year).
- Topic titles between quotation marks identify related topics either within this manual or in the online help, which is also referred to as the *help system* throughout this document.

Technical Support

Technical Support is available during local standard working hours excluding observed Holidays.

Support Headquarters	Winland Electronics, Inc. 424 Riverfront Dr., Ste 200 Mankato, MN 56001 USA
Telephone	Toll Free: 800.635.4269x1
Website	**www.winland.com**
Support E-mail	**tech.support@winland.com**

1 Overview

The INSIGHT platform provides remote environmental monitoring, data logging, and system auditing. Anywhere you have access to the Internet through a computer or a smart device, you can receive E-mail and text alerts, securely monitor your environment, manage your sensors, and generate reports. The Winland Electronics remote monitoring solution protects data security, integrity, and privacy with a proprietary, encrypted data protocol and secure socket layer (SSL) data traffic.

Remote Monitoring

With INSIGHT, environmental monitoring is not a passive exercise. The INSIGHT dashboard (**Figure 1-1**) shows the status of each device. From the device level, you can drill down to see the status and details for each sensor. For each sensor, you have the ability to acknowledge sensor readings to comply with industry or regulatory requirements. When a sensor reading exceeds its thresholds, the INSIGHT platform issues an alert. To ensure that an alert is noticed, the INSIGHT platform provides a way to send alert notifications automatically by E-mail, text, or app notification (push notifications) to a list of users called a *notification profile*. When it comes time for action in response to an alert, the INSIGHT platform enables you to create a plan of action, called a *response profile*, for each device and sensor. The response profile is a sequence of actions that ensures a consistent response to each alert, according to your standard operating procedures (SOP). The INSIGHT platform records acknowledgments and responses that you perform to provide evidence of compliance. For more information about monitoring devices, see **Monitoring Devices**.

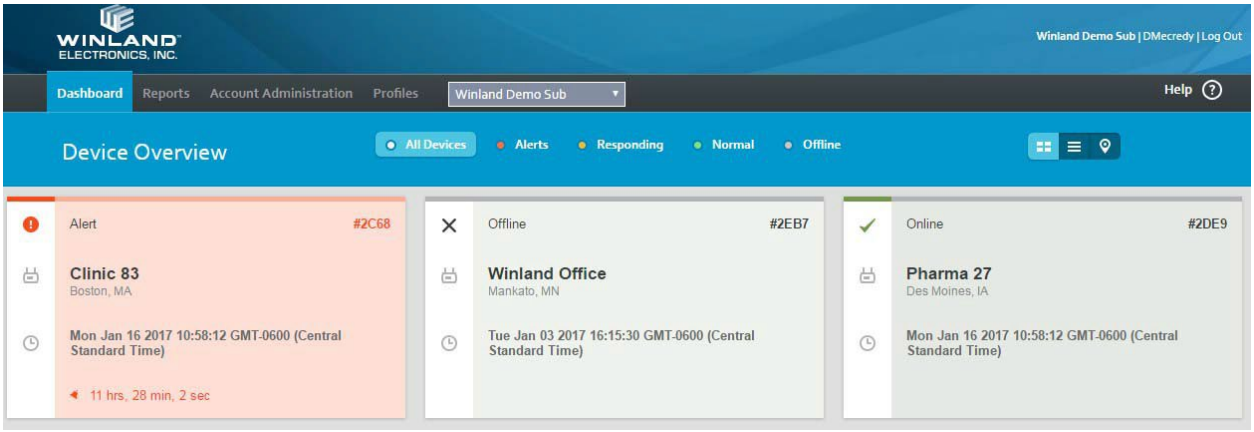

Figure 1-1 INSIGHT Dashboard

Remote Management

As your environment and requirements change, you can use the INSIGHT platform to change your device and sensor settings. Using the INSIGHT account tree (**Figure 1-2**), you have remote control of the following:

- EA800-ip:
  - You can update and delete devices. You can change device parameters such as password, keypad lock, and data collection frequency (see **Managing Devices**).
  - Sensors—You can add and delete wired sensors. You can update wired and wireless sensor parameters, such as high and low thresholds, and alert delay time (see **Managing Sensors**).
- EA*Pro*-GTWY
  - You can update and delete devices. You can change device parameters such as time zone. You can remotely **update the firmware** on the device. (see **Managing Devices**).
  - Sensors-You can add and delete wired or wireless sensors. You can update wired or wireless sensor parameters, such as high and low limits, time delays and more (see **Managing Sensors**).

With INSIGHT, you add *Users* and *Locations* to control who can monitor, manage users and devices in the account tree. A *User* includes a username (Winland recommends using an E-mail address for a username), with which to log into INSIGHT, the person's name, address, phone number, primary and secondary E-mail addresses, and a user's permission level. A location is a named set of users and devices associated with a street address. You can **Share Devices** across locations and accounts, to simulate regions and corporate hierarchies.

- For information about User, see **Managing Users**.
- For information about Locations, see **Managing Locations**.

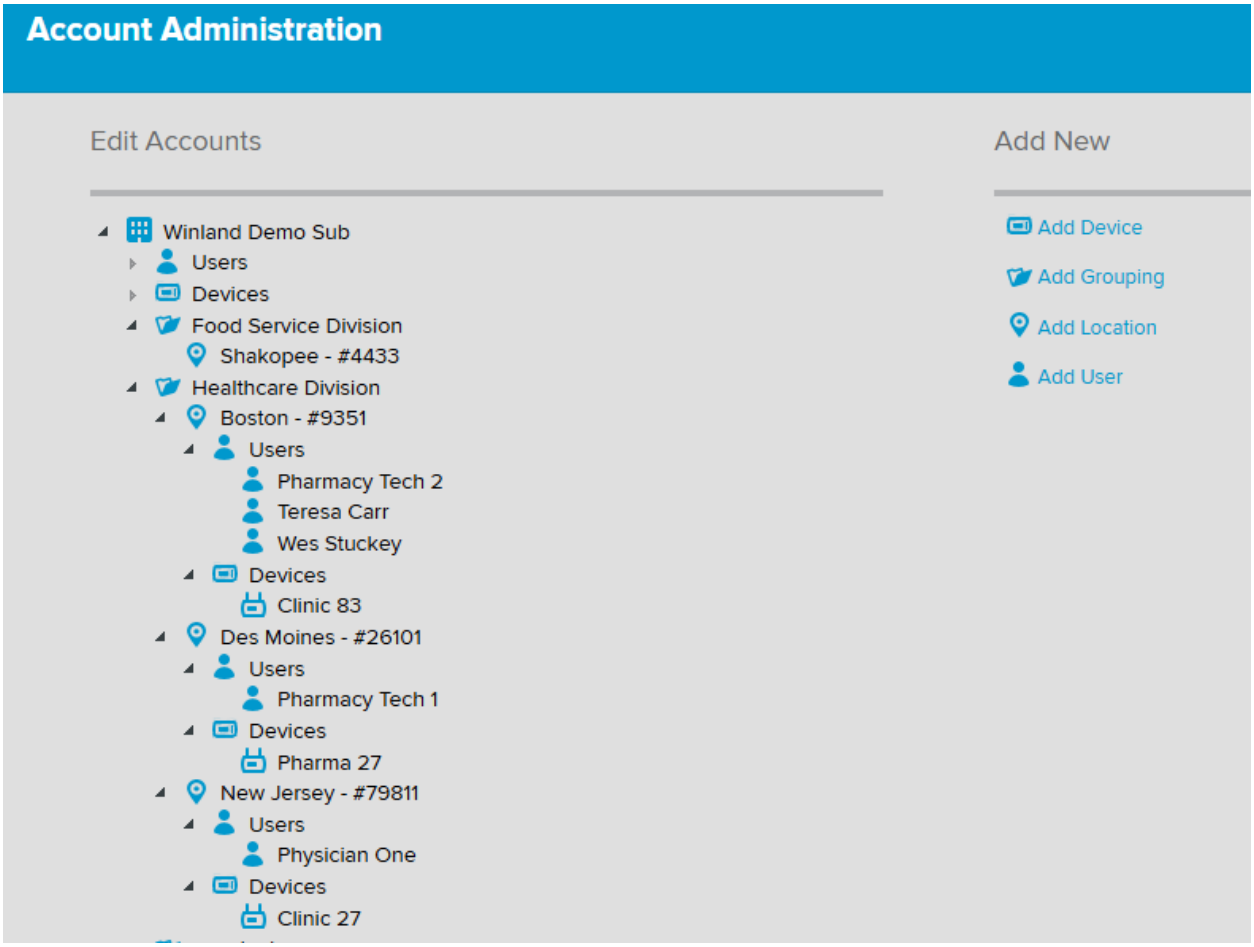

Figure 1-2 INSIGHT Account Tree

Reporting

The INSIGHT platform receives sensor data from a device, as seen on the dashboard. The INSIGHT platform also receives sensor log and alert log data from the device and stores it in the INSIGHT database. It is from this database that INSIGHT creates sensor log reports and alert reports in the form of listings and graphs. INSIGHT maintains device and sensor log data online for 36 months. Beyond 36 months, log data is available from INSIGHT support by request.

A device stores sensor log data in memory at the interval specified by the *Collection Frequency* parameter, with a minimum of 10,000 data points. The EA800-ip has a device level collection frequency, while the EA*Pro*-GTWY allows users to set a collection frequency per sensor. The device regularly transmits log data to the INSIGHT database. For information about the Collection Frequency parameter, see **Adding a Device**.

You can generate a report for one or more sensors covering a period of up to 31 days. Several types of reports are available on-demand in **HTML**, **PDF**, and **CSV** formats,

depending on the report. You can also schedule reports to be created and distributed to selected users by E-mail. For more information about reports, see **Chapter 5, Managing Reports**.

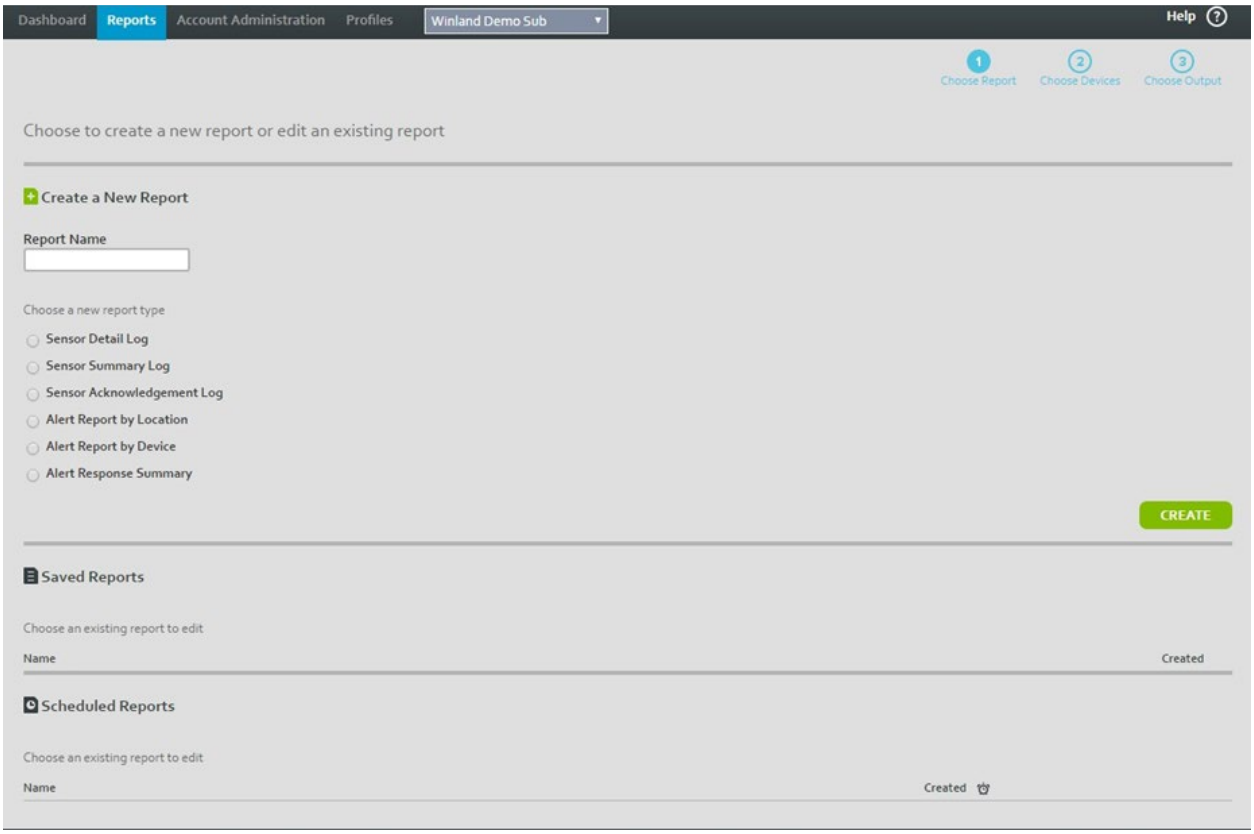

Figure 1-3 INSIGHT Reports

2 Getting Started

The process starts with a request for an INSIGHT account. You may be a reseller, or you may be a customer who wants to implement remote monitoring on a new or existing EA*Pro*-GTWY or EA800-ip device. Each device connects to the Internet through its Ethernet or Wi-Fi access, and your username and password provide secure access to the INSIGHT host server. Add your device(s), sensors, and user to INSIGHT, and you are ready to monitor your environment anywhere you have access to the Internet.

Requesting an INSIGHT Account

The INSIGHT remote monitoring platform is available through a reseller network or directly from Winland Electronics. To request an INSIGHT account as reseller or a customer, fill out the form at **https://winland.com/request-insight-info/**.

Send an E-mail to **tech.support@winland.com**, call **800.635.4269**, or start a chat at **www.winland.com** if you have more questions.

After receiving your request, Winland Electronics will send you an E-mail with an attached PDF form. If you are a reseller, the PDF form asks for company billing information, the name of the responsible party, and an E-mail address to serve as a username.

If you are a customer, the PDF form asks for the company billing information plus the following:

- Name of the security company that installed your device (if applicable).
- An E-mail address to serve as a username.

After receiving your completed PDF form, Winland Electronics or your reseller will send you an E-mail containing your username, a temporary password, and the URL with which to access the INSIGHT host server.

Installing your device

Your device will dictate how many sensors you can install. For example:

- EA800-ip system supports up to 12 environmental sensors (4 wired and 8 wireless).
- EA*Pro*-GTWY system supports up to 34 environmental sensors, (4 wired and 30 wireless).

With an Internet connection and the purchase of an INSIGHT subscription, you can monitor your environmental sensors remotely.

For further information, please view the Quick Start Guide (QSG), or manual for your device.

- **EA800-ip QSG** and **EA800-ip Manual**.
- **EAPro-GTWY QSG** and **EAPro-GTWY Manual**.

Establishing an Internet Connection

After installing your device and sensors, establish an Internet connection to the INSIGHT host server.

To ensure proper communication, your firewall may need to have ports opened. For network information and details:

- EA800-ip: **Troubleshooting Ethernet Connection - Advanced – Winland Electronics**

- EA*Pro*-GTWY: **EAPro-GTWY Advance Network Troubleshooting – Winland Electronics**

If you are unable to establish an Internet connection, contact INSIGHT support at **tech.support@winland.com** or call 800.635.4269.

Logging in to the INSIGHT Platform

To log in to the INSIGHT platform:

1. Open a Web browser using the URL you received in your account confirmation E-mail or go to **www.winlandinsight.com**. The INSIGHT platform supports the following Web browsers:
   - Microsoft® Edge®
   - Google Chrome®
   - Firefox®
2. In the INSIGHT login window, type your *username*, *temporary password*, and then click **Log In**.

NOTE

The INSIGHT platform operates over the Internet from a host server. You can check the status of the INSIGHT platform before logging in by clicking INSIGHT Status in the login window.

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3. After the first login with your temporary password, the system prompts you to change your password, and to provide a secret question. In the **Change Password** window, copy and paste the temporary password, and then click **CHANGE PASSWORD**:
   - Current password
   - New password (minimum of eight alphanumeric characters, uppercase or lowercase, and at least one special character). Validate the new password by typing it a second time.
   - Security question and the answer
4. Read the *End User License Agreement*, check the *I accept the terms of this license* check box, and then click **ACCEPT**.

The INSIGHT platform opens with the dashboard, as shown in **Figure 2-1**. Common to every application page are the ① *menu navigation tabs*, the ② *customer account selector*, the ③ current *Customer Account*, *Username*, and **Log Out** button, and the ④ **Help** button.

- The *menu navigation tabs* provide access to the application tasks.
- The *customer account selector* is available only to users with Reseller permission to select from multiple customer accounts.
- The **Log Out** button closes the platform.
- The **Help** button opens online help for each tab page.

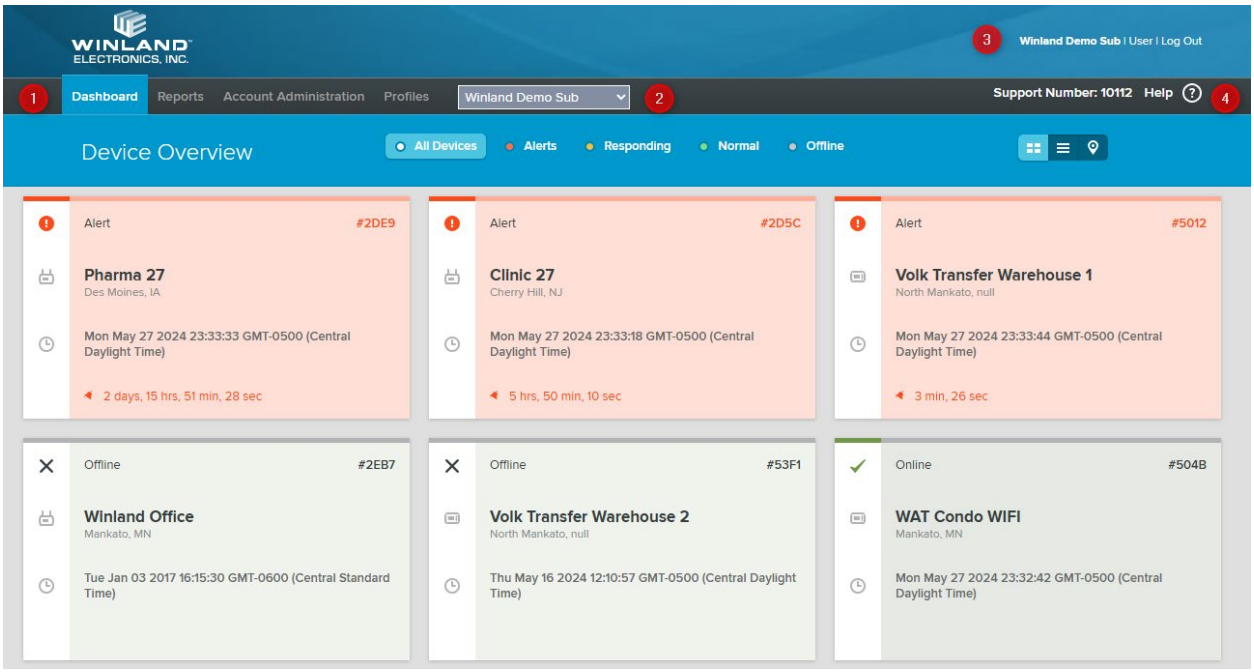


Figure 2-1 INSIGHT User Interface

Configuring INSIGHT

If you requested INSIGHT as a reseller, the username you received will have *Reseller Permissions*. *Reseller Permission* means that you have authority to add customer accounts (see **Managing Customer Accounts**).

If you requested INSIGHT as a *Direct Customer*, the username you received has *Admin Permission*. *Admin Permission* means you have authority to add users and configure your monitoring environment, as well as adding, deleting, or editing devices or sensors.

It is important to differentiate between *Admin Permissions* and an *Owner/Created By*. The user that adds a device to INSIGHT, being an *Admin* or *Reseller*, will be considered the

Owner of the device. Only one person can be an *Owner*, while multiple users can be an *Admin* of a device. This special permission allows for **Device Sharing**. A schedule report also has an *Owner* and can control which users receive a scheduled report, if you are not the *Owner* of a report, you cannot modify or view that specific report. This permission can be changed with a written request to **tech.support@winland.com**

Winland recommends reaching out to **Technical Support**, for initial setup guidance when designing your critical monitoring configuration.

With your environment monitoring plan in mind, do the following to configure a basic monitoring environment:

1. Add your devices and sensors, selecting the corresponding response profile for each. See **Adding a Device** and **Adding a Wired Sensor**.
2. Add one or more notification profiles to cover your users, selecting from the devices and sensors you added previously. **Adding a Notification Profile**.
3. Add a User for each of your users, selecting the corresponding notification profiles for each. See **Adding a User**.

At some point, you may also want to do the following to assign alert response procedures, control user/device access, and organize the account tree:

- Add one or more response profiles to cover your devices and sensors. See **Adding a Response Profile**. Remember to update your device and sensor configurations to include a response profile.
- Add locations, and then populate them with users and devices. See **Adding a Location** and **Working with Locations**.
- Add groupings, and then populate them with locations. See **Adding a Grouping** and **Working with Groupings**.

3 Monitoring Devices

The dashboard is your window to your monitored environments. You can customize the dashboard to show devices based on device status or sensor status. Using the dashboard, you can acknowledge a sensor reading, and document your response to an alert with a plan of action. You can set priorities for devices, and hide devices from the dashboard, often due to removal of a system while wanting to keep historical data on INSIGHT.

Using the Dashboard

To view the dashboard, click the *Dashboard Navigation Tab*, as shown in **Figure 3-1**. In this example, there are six tiles ①, each representing a device, you can see both EA800-ip and EA*Pro*-GTWY at the same time. At the center of the Device Overview banner, there are several filter radio buttons ② and three dashboard view buttons ③ from which to choose.

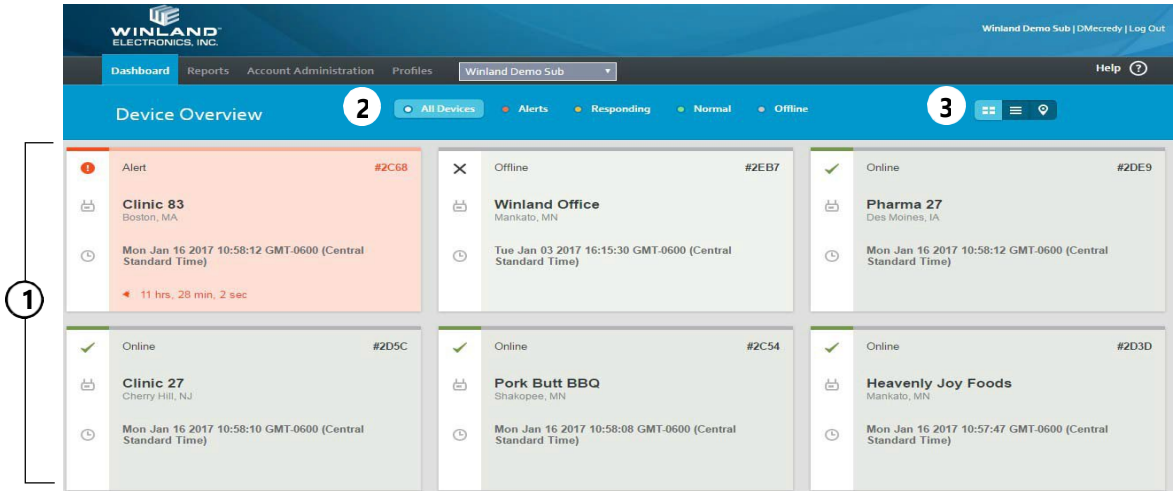


Figure 3-1 Dashboard - Device Overview

Regardless of the filter or dashboard view, each view includes the following:

- Device/sensor status:
  - ❑ Green indicates Online; the device is operating normally.
  - ❑ Red indicates Alert; one or more sensors have exceeded a threshold.
  - ❑ Yellow indicates Responding; a response to an alert is in progress.
  - ❑ Gray indicates Offline; the device is not communicating with the host.
- User-defined name for the device
- Equipment serial number (ESN), shown in hexadecimal.
- City and state/province where the device is located, based on address information from the customer account or from the location in which the device is a member.
- Date/time that sensor data was last received from the device.
- Elapsed time while in an alert condition[1].

[1] Applies only when an alert condition exists.

NOTE

A device that is offline will still trigger alarms locally based on lights, buzzers, or relay settings.

Dashboard Views

There are three dashboard views: Device Overview, Device List View, and Map View.

Choose the dashboard view using the view buttons . Click (Device Overview) to display each device as a tile. Click on a tile to display the sensor information for that device, as shown in **Figure 3-2**.

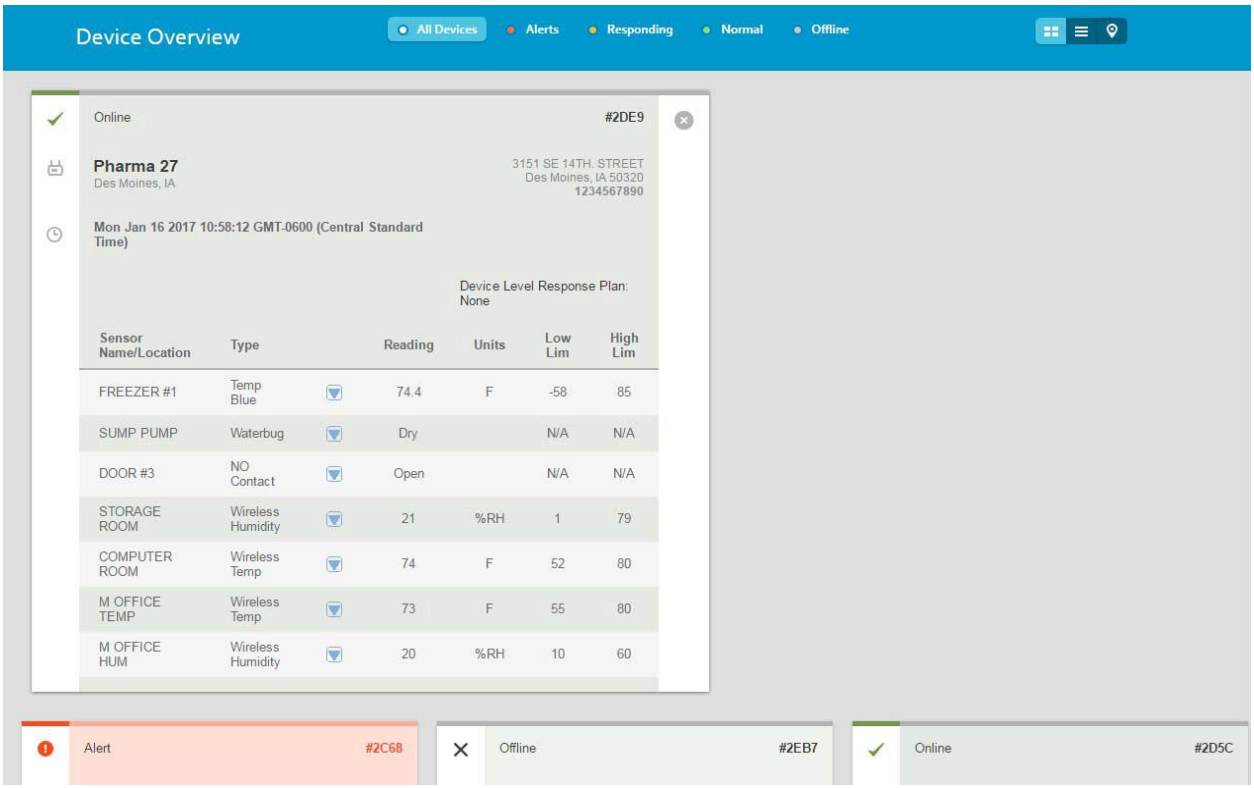


Figure 3-2 Dashboard—Device Overview, Sensor Detail

Click (Device List View) to present the devices in a table. Click on a row in the table to reveal the sensor information for that device, as shown in **Figure 3-3**. For accounts with many devices, the Device List View makes reading easier with:

- First, Previous, Next, and Last paging (lower right)
- Devices per page (Show entries, upper left)
- Search function to filter device entries by keyword (upper right)
- Sorting by sensor name, sensor type, sensor reading, units of measure, and limits by clicking the corresponding column labels.

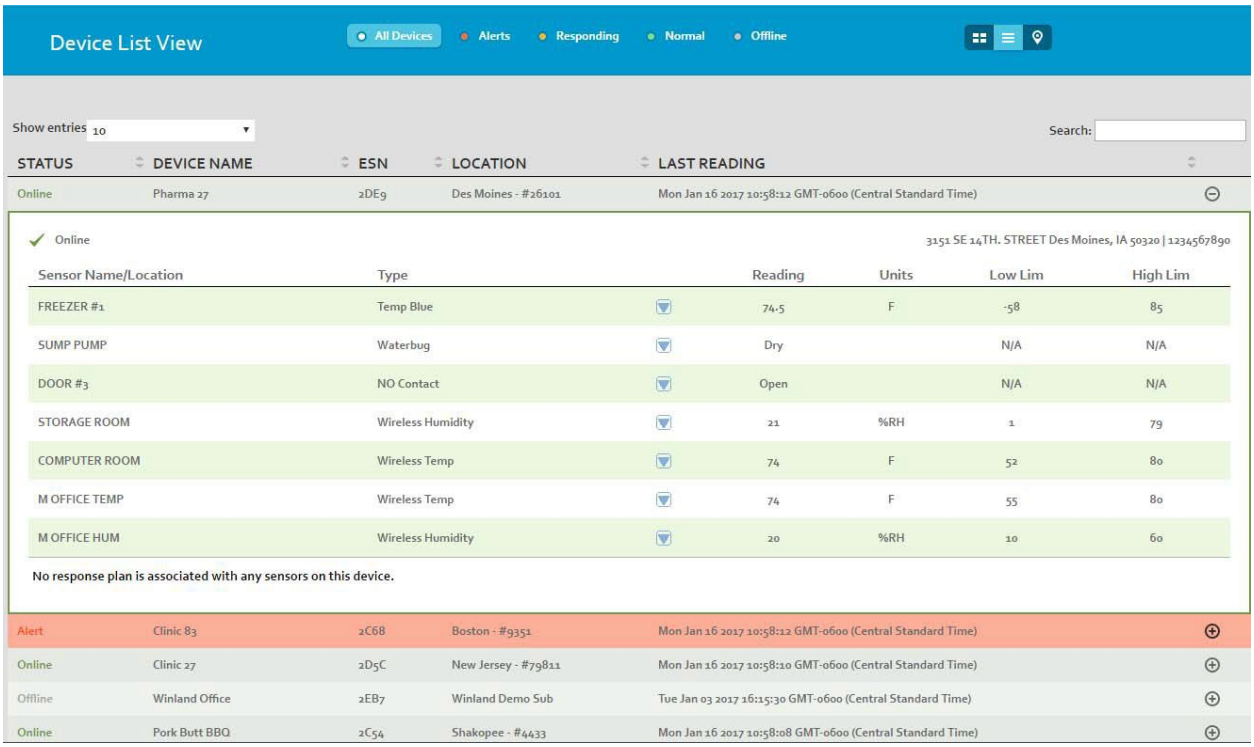


Figure 3-3 Dashboard—Device List View

Click (Map View) to display a map with a marker indicating the geographic position and status of each device (**Figure 3-4**). Initially, the marker position on the map is determined by the billing information that you provided when you requested an INSIGHT account. However, marker positions can change as you create and modify locations. For more information about locations, see **Managing Locations**.

Click-and-drag to move the map up, down, left, and right. Use the other navigation tools to change your view of the map:

- Road —Mouse over the pull-down menu to view a standard road map, aerial view, or street-side view.
- —Locate Me centers the map and zooms in the approximate location based on the gateway IP address.
- —Zoom In
- —Zoom Out

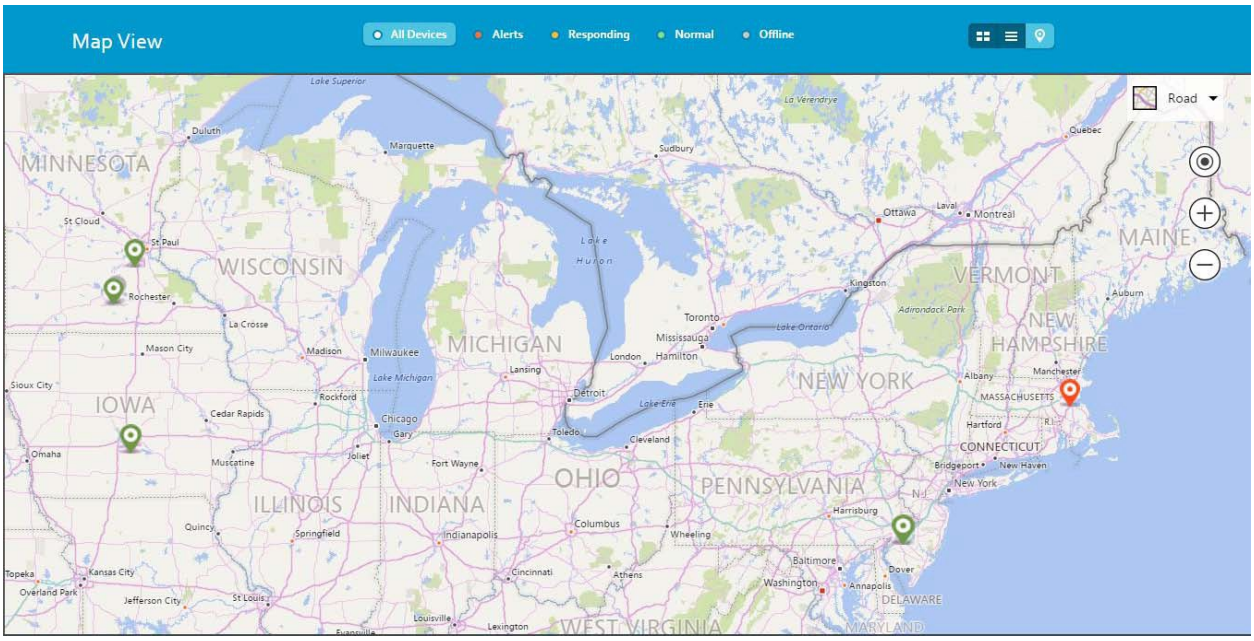


Figure 3-4 Dashboard—Map View

To show sensor information for a device, click on the corresponding marker. For example, click on the marker in Iowa to show sensors for Pharma 27 (**Figure 3-4**). If there is more than one device at a location, click the < and > tabs to page through the devices.

Dashboard Filters

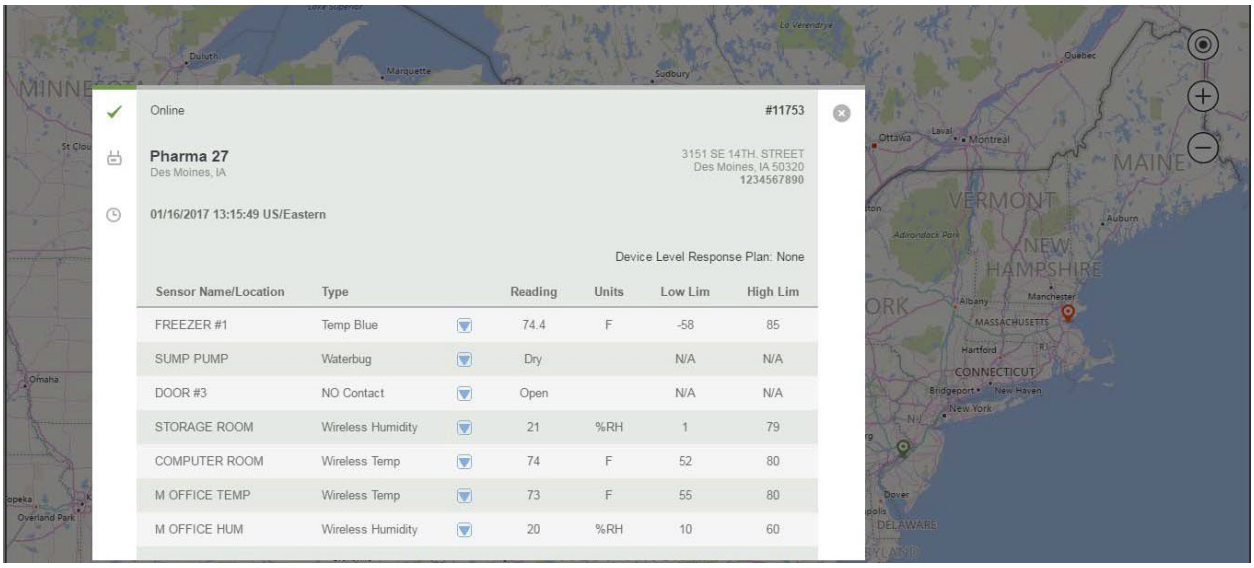


Figure 3-5 Device Detail from Map View

For all dashboard views, the dashboard filter buttons determine which devices to show based on the device operational state or sensor state. **Table 3-1** describes the dashboard filters.

Table 3-1 Dashboard Filters

Dashboard Filter	Description
All Devices	Displays all devices regardless of operational or sensor state.
Alerts (Red)	Displays devices that have one or more sensors that have an alert condition.
Responding (Yellow)	Displays devices that have one or more alerts for which a response is in progress. Responding will stay until the alarm is cleared, regardless of steps being completed.
Normal (Green)	Displays devices that are communicating with the INSIGHT host server and no alarms or warnings are being sent from the device.
Offline (Gray)	Displays devices that are not communicating with the INSIGHT host server.

Displaying Sensor Information

Depending on your dashboard view, click on a tile or table entry to show sensor information. **Figure 3-6** is a tile showing the sensor list for the Pharma 27 device. To minimize the tile, click .

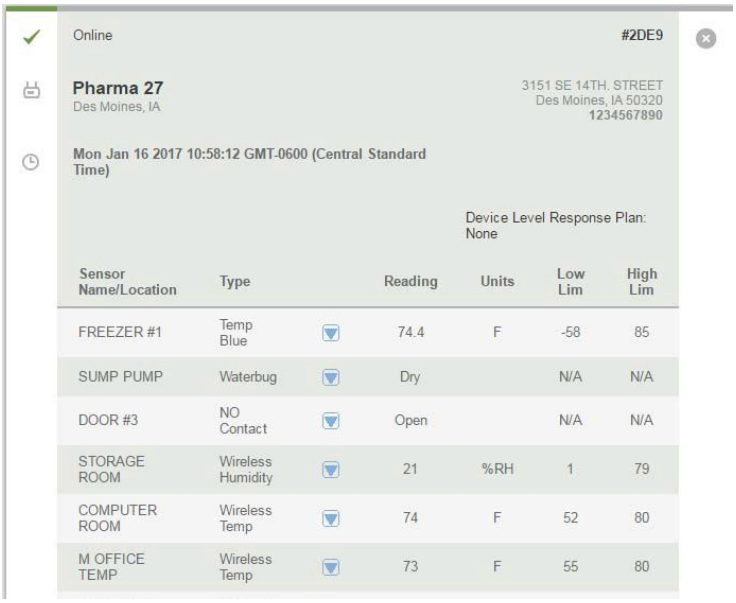


Figure 3-6 Device Sensor List

The sensor list shows the following information for each sensor:

- Sensor Name: Name that was assigned when the sensor was programmed at the device or through INSIGHT.

- Type: Wired or wireless sensor type including temperature, humidity, water, and contact (normally closed and normally open).
- : button that acknowledges a sensor value or responds to an alert. The device issues an alert when a sensor reaches its low/high limit, or when a contact sensor reads other than its normal state. For more information about alerts, see **Responding to an Alert**.
- Timestamp (EA*Pro*-GTWY): Last timestamp of sensor data.
- Reading: Numerical or Boolean value reported by the sensor.
- Units: Unit of measure that applies to the Reading, Low Lim, and High Lim values, such as Celsius (C), Fahrenheit (F), and relative humidity percentage (RH%).
- Low Lim: Sensor reading at or below which the device issues an alert.
- High Lim: Sensor reading at or above which the device issues an alert.

In addition to the standard device information, the device tile also shows the Device Level Response Plan (also known as the *device response profile*). The device response profile is a sequence of actions that have been prescribed for an alert condition that occurs on any sensor connected to the device. If there is a response plan link present, you can click it to review or edit the device response profile. You can specify a response profile by modifying an existing device.

For more information about adding and modifying response profiles, see **Response Profiles**.

For information about specifying a response profile on an existing device, see **Modifying a Device**.

Acknowledging Sensor Readings

Some industry and government regulations require that a human being periodically validate normal sensor readings. This validation is called an acknowledgment. The INSIGHT platform records and maintains acknowledgment data for compliance purposes.

To acknowledge a sensor reading:

1. In the dashboard device sensor list, click on the sensor, and then select **Acknowledge**.
2. In the Acknowledgment window (**Figure 3-7**), review the Acknowledgment History for any helpful information.
3. In the Add Notes field, type some appropriate notes, and then click **ACKNOWLEDGE SENSOR VALUE**. In addition to your notes, your entry in the

Acknowledgment History will include the acknowledged value, your name and username, and a date/time stamp.

4. To select another sensor, click the Sensor pull-down menu. To minimize the Acknowledgment window, click .

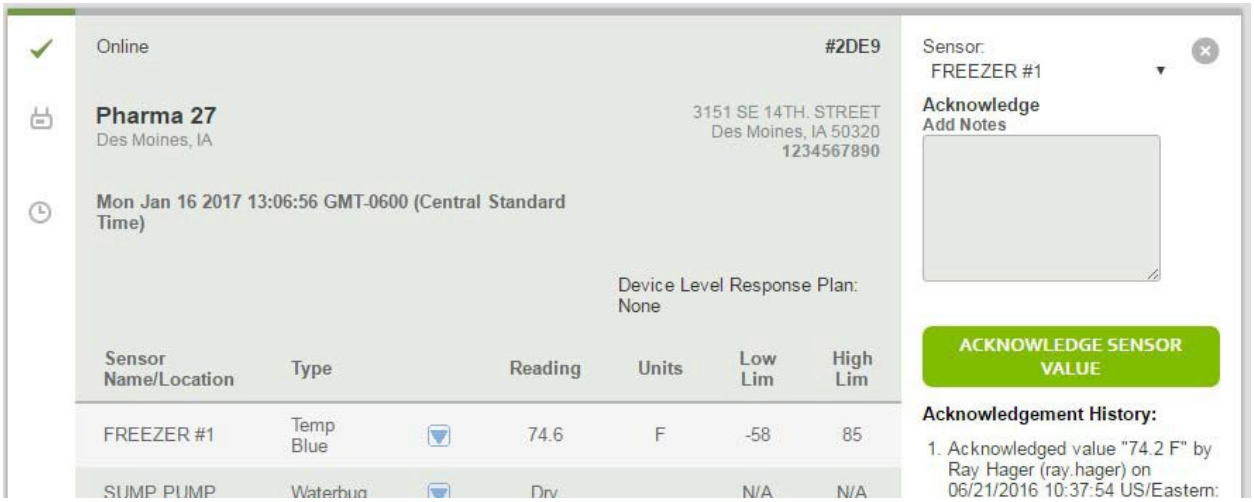


Figure 3-7 Sensor Reading Acknowledgment

Responding to an Alert

When a sensor reads a value that exceeds its assigned thresholds, the device/gateway issues an alert to INSIGHT. Depending on the dashboard view, the device tile, table entry, or map marker will be red. **Figure 3-8** shows a device tile with an alert condition.

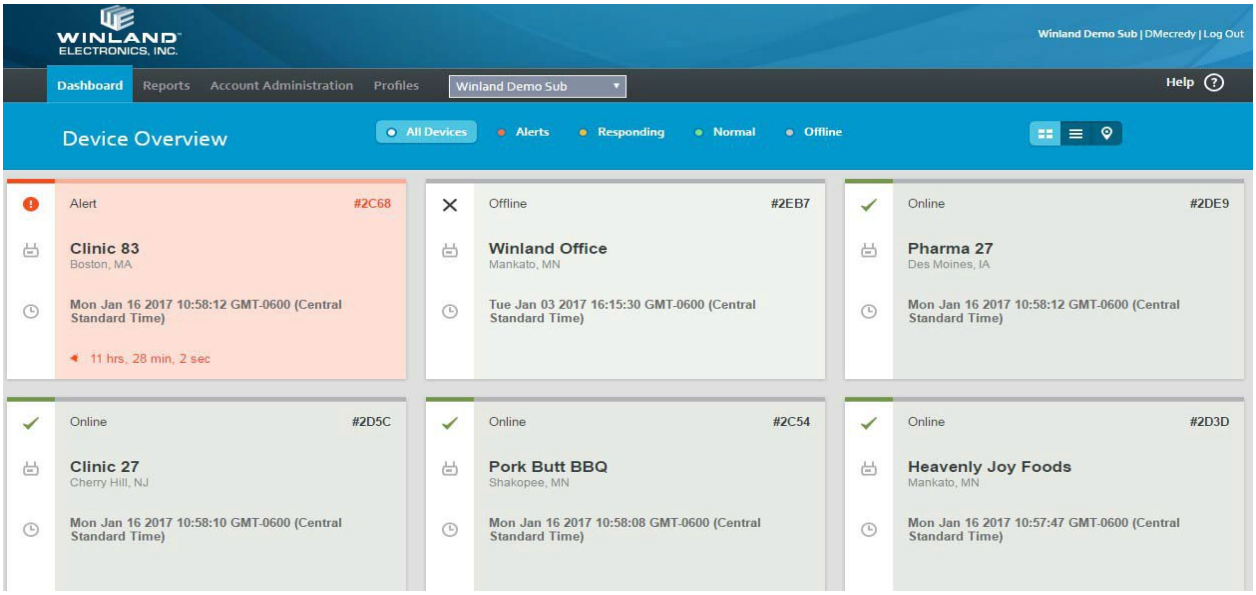


Figure 3-8 Dashboard with an Alert

Responding to an alert means performing a sequence of actions according to the response profile that is defined for the sensor. A response profile is a named series of actions that

you create based on your SOP. For information about creating a response profile, see **Adding a Response Profile**.

To be implemented, a response profile must be assigned to a device or a sensor:

- A response profile assigned to a device applies to all sensors connected to that device. For information about specifying a response profile for a device, see **Modifying a Device**.
- A response profile assigned to a sensor applies only to that sensor and takes precedence over the response profile specified for the device. For information about specifying a response profile for a sensor, see **Adding a Wired Sensor** and **Modifying Wired and Wireless Sensors**.

To respond to an alert:

1. Depending on your dashboard view, click the device tile, table entry, or map marker.
2. In the Response window (**Figure 3-9**), review the Action History for any helpful information.
3. If this sensor or its device has a response profile, you will be prompted to perform the first action. After performing the action and typing some appropriate notes, click **ACTION 1 COMPLETE**. Repeat this process for each action in the response profile.
4. To select another sensor, click the Sensor pull-down menu. To close the Response window, click .

While a response is in progress, the device/sensor will be yellow on the dashboard.

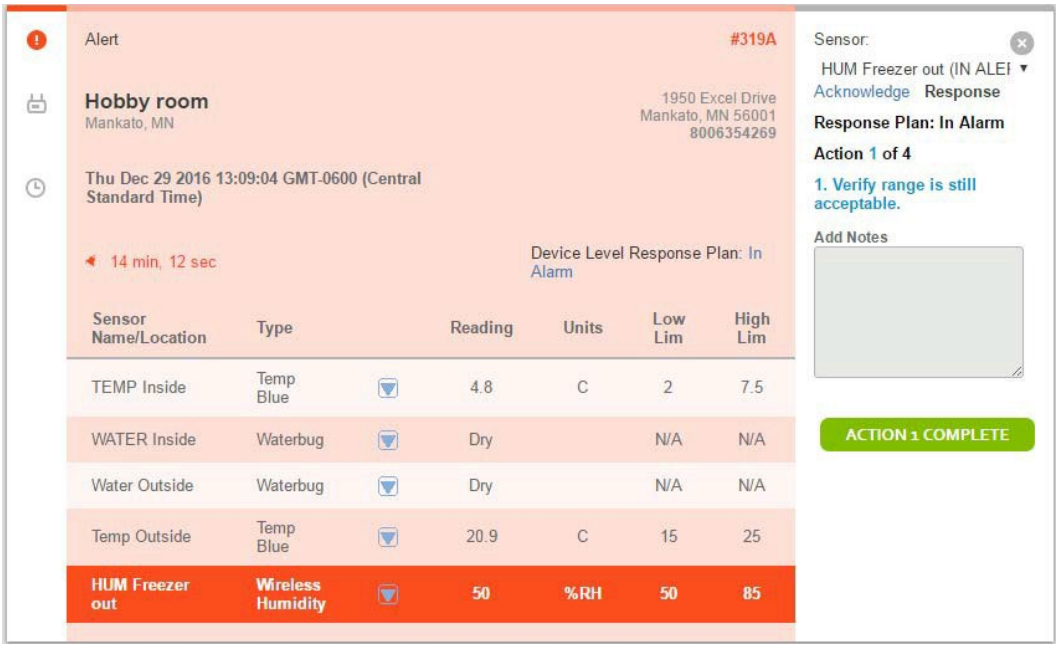


Figure 3-9 Alert Response

4 Account Administration

Account administration begins with the account tree, from which you can manage customer accounts (resellers only), users, devices, **device shares**, and their connected sensors. This chapter also describes the use of locations and groupings to control user access to devices and to organize the account tree.

Using the Account Tree

The account tree shows the users, devices, locations, and groupings in a customer account. INSIGHT uses the concept of a location to limit user access to specific users and devices. A location is a named set of users and devices associated with a street address. You can think of the customer account as a type of location with extended access over all users and devices in the account tree. For more information about moving users and devices into locations, see **Working with Locations**. For information about groupings, see **Working with Groupings**.

A user's customer account/location membership, combined with the *User Permission* level, determines what the user can see and do in the account tree. Membership in the top hierarchy (customer account) gives a user access to all users, devices, locations, and groupings in the account tree. Membership in one location gives a user access to all users and devices in the same location. The *User Permission* levels, listed in **Table 4-1**, determine what a user can do in the customer account or location of which it is a member.

Table 4-1 User Permission Levels

Permission Level	Description
Reseller Admin[2]	■ View and add customer accounts. ■ View, add, modify, and delete users, devices, locations, and groupings. ■ Move users and devices between locations. ■ Move locations between groupings.
Owner/ Created by	■ Share Devices with internal or external users to account.
Admin	■ View, add, modify, and delete users, devices, locations, and groupings. ■ Move users and devices between locations. ■ Move locations between groupings.
User	■ View users, devices, locations, groupings.

[2] Applies across customer accounts.

In **Figure 4-1**, User_1 and User_2 are members of the customer account (Customer_Acme) and have access to all users, devices, and locations. User_3 and User_4 are members of Location_1 and have access to each other and Device_4. To understand the effect of user permissions on the account tree, assume the following:

- User_1 has *Admin Permission*. Therefore, User_1 can view all elements in the account tree and make changes throughout the entire account.
- User_2 has *User Permission*. Therefore, User_2 can view all elements in the account tree but cannot make changes.
- User_3 has *Admin Permission* and resides in a location. Therefore, User_3 can view elements only in Location_1 and make changes only in Location_1.
- User_4 has *User Permission* and resides in a location. Therefore, User_4 can view elements only within Location_1.

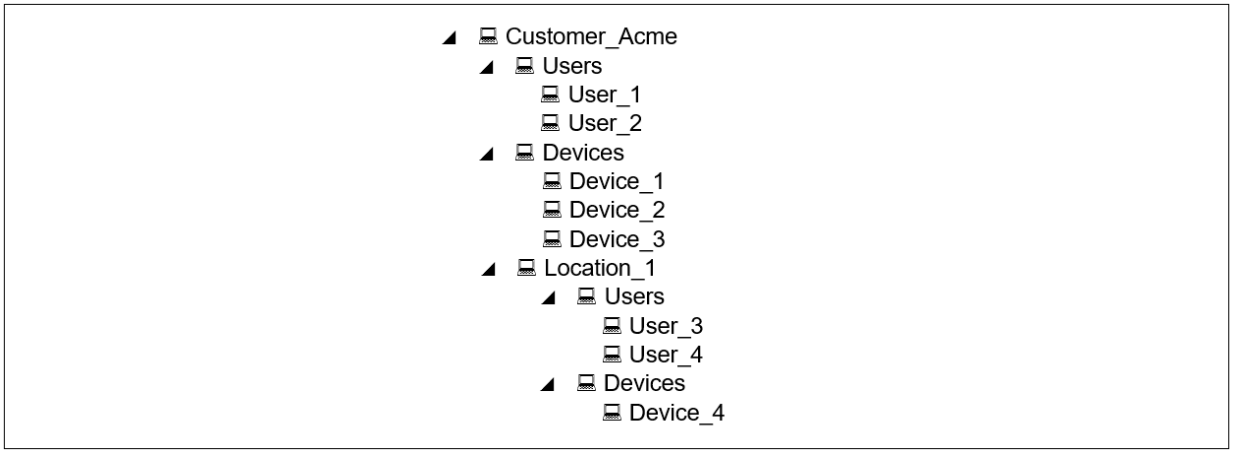


Figure 4-1 User Access, User Permission, and the Account Tree

For information about assigning a *User Permission* level to a user, see **Adding a User**.

Working with Locations

To move a user or a device to a location:

1. In the account tree, drag-and-drop the user or device from one location to another. Users and devices can be moved between locations or between the customer account and a location in either direction.
2. When prompted to confirm your intention to alter the hierarchy, click **YES, I'M SURE**; otherwise, click **CANCEL**.
3. In the *Edit User* or *Edit Device* section, make any necessary changes to the user or device parameters, and then click **SAVE**. Otherwise, if there are no changes, click **CANCEL**.

4. Inspect the account tree to confirm the placement of the user or device in the location.

In **Figure 4-2**, User_3 and Device_3 move from Customer_Acme to Location_1. After the move, User_3 has access only to Device_3; User_1 and User_2 have access to all users and devices.

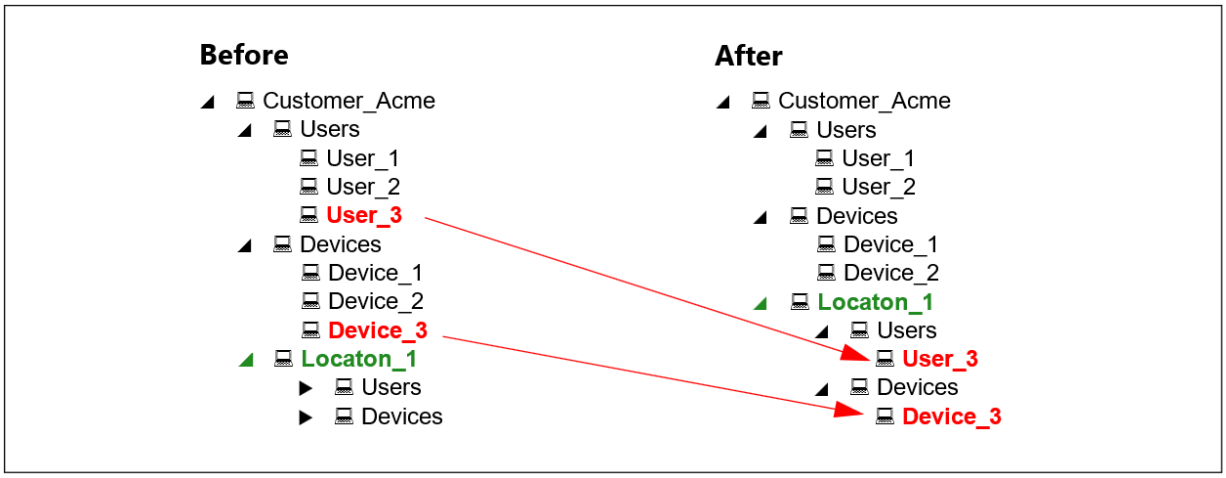


Figure 4-2 Moving Devices and Users to a Location

For information about adding, modifying, and deleting a location, see **Managing Locations**.

Working with Groupings

A grouping is a named set of one or more locations that is used to organize the account tree. Groupings do not affect user access to devices; users have access only to devices in the same location whether the location is inside a grouping or not. For information about adding, modifying, and deleting groupings, see **Managing Groupings**.

The following example adds two groupings, and then moves Location_1 and Location_2 from Customer_Acme into Division_I_Grouping; Location_3 and Location_4 into Division_II_Grouping.

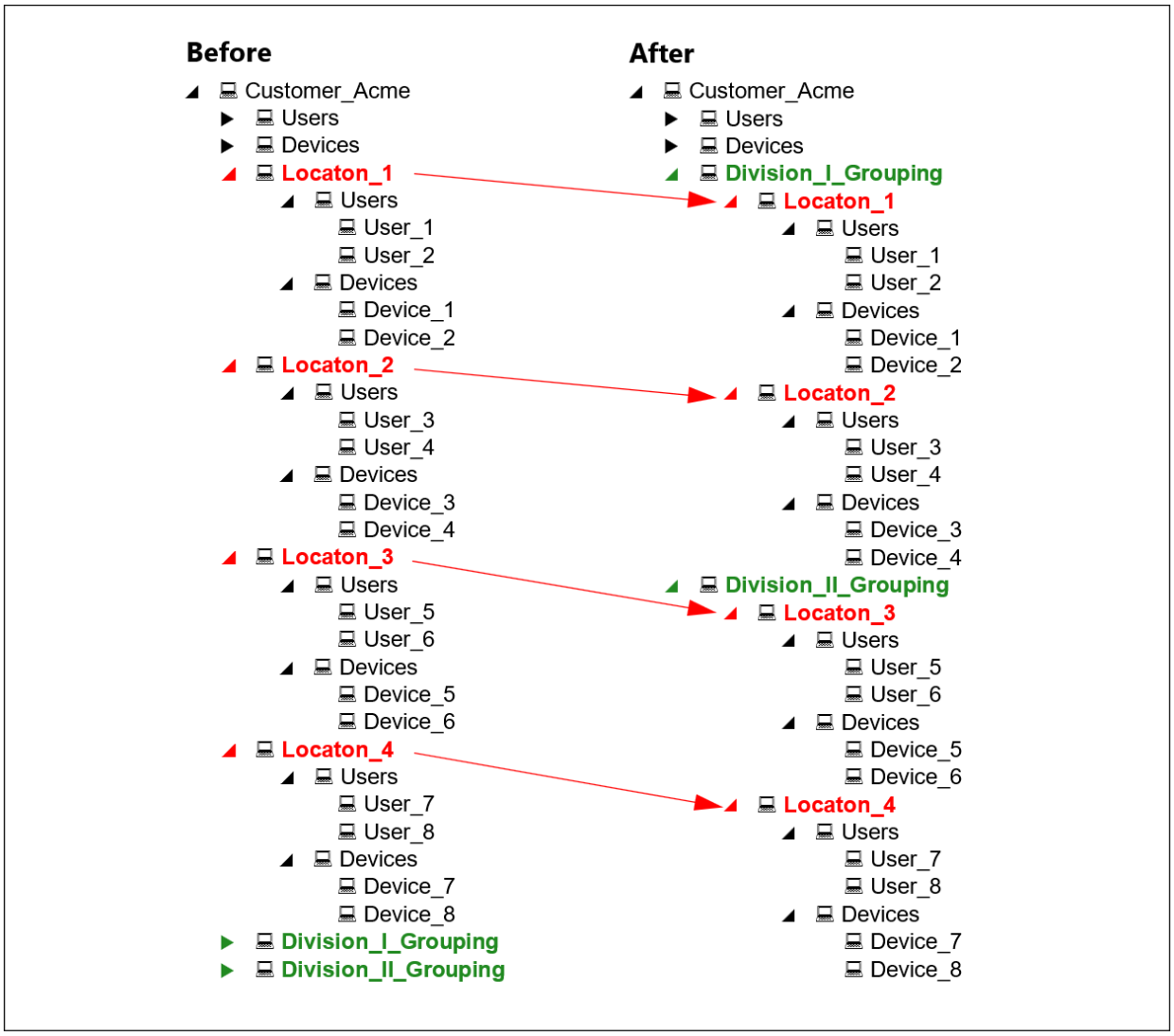


Figure 4-3 Moving Locations to a Grouping

To move a location:

1. Drag-and-drop a location into a grouping. Locations can be moved between groupings or between the customer account and a grouping in either direction.
2. When prompted to confirm your intention to alter the hierarchy, click **YES, I'M SURE**; otherwise, click **CANCEL**.
3. In the Edit Location section, make changes to the location parameters, and then click **SAVE**. Otherwise, if there are no changes, click **CANCEL**.
4. Inspect the account tree to confirm the placement of the location in the grouping.

Managing Customer Accounts

NOTE

The functions described in this section are for resellers only. If you are not a reseller and find that you can create and or delete customer accounts in INSIGHT, contact INSIGHT support at **tech.support@winland.com** or call **800.635.4269**.

As a reseller, your username has *Reseller Permission*, which makes you the administrator of your account with the ability to add customer accounts. You can add users with *Reseller Permission* to your account, who can also manage the customer accounts. For example, **Figure 4-4** shows a reseller's account tree (Winland Demo Main) and its customer's account tree (Winland Demo Sub). All users in the reseller's account that have *Reseller Permission*, can manage the customer's account, though none of the users in reseller's account are found in the customer's account.

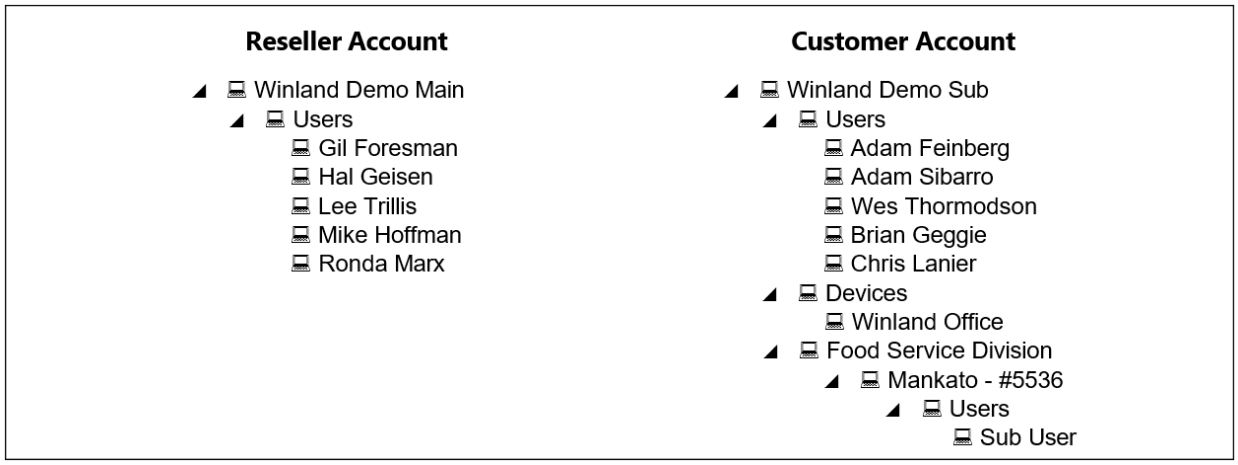


Figure 4-4 Reseller and Customer Accounts

To view the available customer accounts, click the **Account Administration** tab to open the Account Administration window, as shown in Figure 4-5.

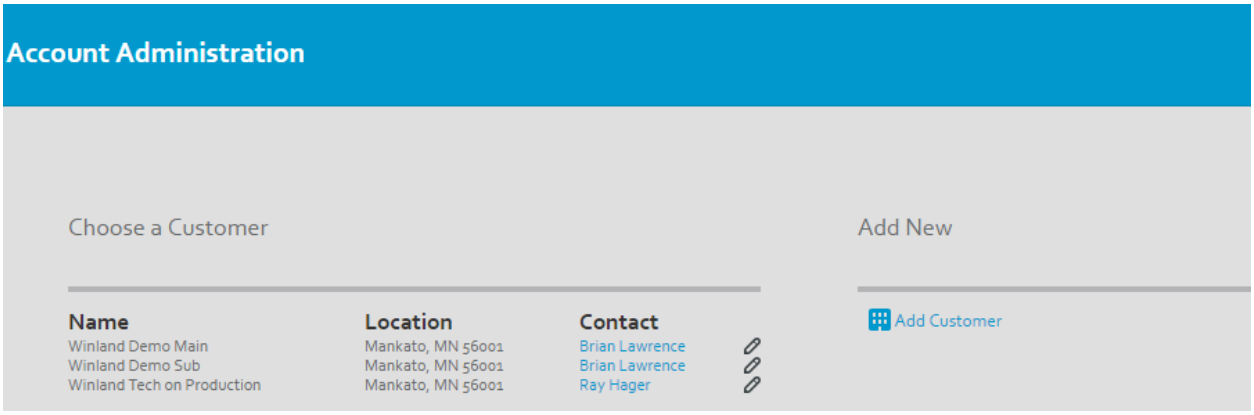


Figure 4-5 Account Administration - Customer Accounts

- To view customer details, click opposite the entry in the Choose a Customer section.
- To add a customer account, click Add Customer in the Add New section. For more information about adding a customer account, see **Adding a Customer Account**.
- To manage users, devices, and sensors for a specific customer, click the *customer's name* in the **Choose a Customer** section. From the account tree in the **Edit Accounts** section (**Figure 4-6**), you can manage users, devices, locations, and groupings. In the **Add New** section, you can add new devices, groupings, locations, and users.

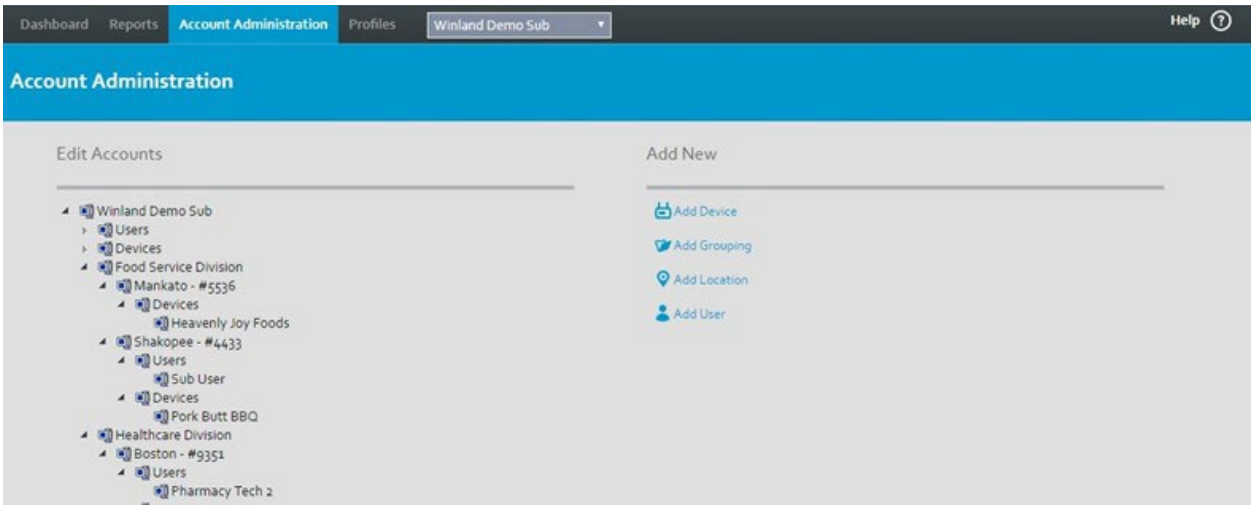


Figure 4-6 Account Administration - Edit Accounts

Adding a Customer Account

To add a customer account:

1. Click the Account Administration tab.
2. In the Add New section, click Add Customer.
3. In the Add Customer section, type values for the following fields:
   - Customer Name—Name of the customer's company.
   - Primary Contact—Name of the individual who will administrate users and devices.
   - Primary Phone—Telephone number of the primary contact.
   - Primary E-mail—E-mail address of the primary contact.
   - Company address, country, city, state/province, and zip code.
   - Description—Optional details about the customer account.
4. Click **SAVE** to save the customer account information; otherwise, click **CANCEL**.

Modifying or Deleting a Customer Account

You cannot modify or delete a customer account; nor can you merge two existing customer accounts. To create organizational divisions within a customer account, use locations and groupings. If you need to make changes to your customer account, contact INSIGHT support at **tech.support@winland.com** or call **800.635.4269**.

Managing Users

Users determine who can log into INSIGHT and what users can do in the customer account or location of which they are a member. For information about the factors that determine user access to elements in the account tree, see "Using the Account Tree" on page 18. This section describes how to add, modify, and delete a user.

Adding a User

When you add a user, an E-mail is sent to the primary E-mail address indicating the new username and temporary password. You must have *Reseller Permission* or *Admin Permission* to add a user.

To add a user:

1. Click the Account Administration tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.

2. In the Add New section, click Add User.
3. In the Add User section, type values for the following fields:

- Username - Username consisting of upper and lowercase alphanumeric characters, period (.), underscore (_), and @. The username must be unique across the entire INSIGHT database; therefore, an E-mail address is recommended. Choose this name wisely; it cannot be changed except to delete the User and add a new one.
- First Name, Last Name - Name of the person who owns the user.
- Primary E-mail - E-mail address that receives the username and temporary password. This E-mail address also receives alert notifications.

NOTE

Winland does not recommend using a phone to email for the primary email address. SMS to Email often cut past a certain character, which can make it impossible to receive password resets.

- Secondary E-mail - An alternate E-mail address to receive alert notifications. This address can also be the number for a phone that can receive text messages. To find the E-mail format for your wireless carrier, click here in the sentence:
- "Click here for common text message E-mail formats."
- Notification Profile - Click the pull-down menu, and then select from the list of notification profiles. A notification profile defines the sensors and conditions for which the user is to receive alert notifications. For more information about notification profiles, see **Notification Profiles**.

CAUTION

If you do not specify a notification profile for the user, the user will not receive alert notifications.

- User Permission Level - Choose a permission level. For information about user access and user permission levels, see **Using the Account Tree**.
  - ❑ Reseller - View/add/modify customer accounts, user, devices, locations, and groups for multiple customers.

- ❑ Admin - View/add/modify user, devices, locations, and groups for a single customer.
- ❑ User - View users, devices, locations, and groups for a single customer.

- Account Locked - Locks (checked) or unlocks (unchecked) the user. If the user is locked, the user cannot log in to INSIGHT.
- Address, Country, City, State/Province, Zip/Postal Code.
- Primary Phone - Telephone number of individual who owns the user.

4. Click **SAVE** to save the user information; otherwise, click **CANCEL**.

Modifying a User

To modify a user:

1. Click the Account Administration tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.
2. In the Edit Accounts section, click a user in the account tree.
3. In the Edit User section, make the necessary changes. The username cannot be changed. For information about the user parameters, see **Adding a User**.
4. Click **SAVE** to save the user information; otherwise, click **CANCEL**.

Deleting a User

Deleting a user from INSIGHT will set the user to be unable to login with the associated username. You may want to consider the following alternatives:

- To temporarily block access to INSIGHT while retaining the user, you can lock the user, as described in **Modifying a User**.
- To remove a User from a location, see **Working with Locations**.

To delete a User:

1. Click the Account Administration tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.

2. In the Edit Accounts section, click a user in the account tree.
3. In the Edit User section, click **Delete User**.
4. In the User Delete Confirmation window, click **YES, I'M SURE** to confirm the deletion; otherwise, click **CANCEL**.

Managing Devices

Adding a device requires three pieces of information: customer desired 'device name', the serial number, and the device key. Having added a device to INSIGHT, you can now remotely manage device parameters, date and time, buzzer, and several others. The following sections describe how to add, modify, and delete a device.

NOTE

Features may not be available based on the model of the device. Please refer to your device's manual for more information.

Adding a Device

Before you can add a device to INSIGHT, the console must be installed, connected to the Internet, and communicating with the host server. INSIGHT may require you to add a sensor after initial connection to validate physical ownership of the device. You will also need the device serial number and device key, which can be found in two places:

EA800-ip:

- On the Ethernet port mounted on the EA800-ip circuit board.
- On the EA800-ip console Main Menu: select About EA800, select ENET (F2), and SN and Key will be on the display.

EA*Pro*-Gateway

- On top of the board on a label attached to the circuit board.
- On the Main Menu: select **ABOUT**, select **CONFIRM**.

To add a device:

1. Click the Account Administration tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.

2. In the Edit Accounts section, click Add Device.
3. In the Add Device section, type values for the following fields:
   - Device Name - Descriptive name by which to identify the device in INSIGHT.
   - Serial Number - Device serial number.
   - Key - Device key.
4. Click **SAVE** to save the device; otherwise, click **CANCEL**.

Modifying a Device

To modify device parameters:

1. Click the Account Administration tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.
2. In the Edit Accounts section, click a device in the account tree. The *Device Edit* will open by default.

3. In the *Device Edit* section, make the necessary changes to the following parameters.

NOTE

If a field is greyed out, it means INSIGHT does not support the parameter to be adjusted. For more information on device support, use your **device's manual**.

- Device Name – Customer driven custom name. Changing a device's name will show that name throughout all historical reports. Name changes are stored for auditing.
- Root PIN - Four-digit password used to unlock the device.
- Date Format - Date format: *MM/DD/YYYY* or *DD/MM/YYYY*.
- Time Format - Time format: 12 hour or 24 hours.

- Device Response Profile—Action plan to perform in response to an alert on any sensor connected to this device. For more information about response profiles, see **Response Profiles**.
- Time Zone - Time zone.
- Offline Alert Time—Time period that the device can be without communication with the host server before issuing an alert. Select 10 Minutes, 30 Minutes, 1 Hour or 2 Hours. Select Disabled to send no alerts regarding offline status.
- Reminder Interval - Time period that INSIGHT waits to send a reminder alert E-mail after the first alert E-mail has been sent to users in the notification profile. Select 10 Minutes, 30 Minutes, 1 Hour or 2 Hours. Select Disabled to send no alerts of any kind, including condition alerts, offline alerts, and alert reminders.
- Buzzer - Enables or disables the audible alarm on the device.
- Lights – Enables or disables the visual alarm (LED) on the device.
- Dashboard Priority – Allows dashboard customization in which order the devices display, where 1 is top priority and 5 is lowest priority. Device(s) in alert or offline will take precedence.
- Collection Frequency - Time interval at which to collect and store sensor log data in the INSIGHT database. Select 5 Minutes, 15 Minutes, 30 Minutes, 1 hour or 2 hours.

NOTE

Collection Frequency may be at the device, or sensor level depending on the device.

- Keypad Lock - LOCKED or UNLOCKED the device's local editing. If the keypad is locked, the device can be managed only through INSIGHT.
- Dashboard Hidden – Removes devices from the Dashboard. This can be used on devices that have been removed from service, that is required to stay on INSIGHT for historical data or auditing requirements.
- Description / Notes – Key notes or historical data for display, when looking at the device edit screen. Recommended to place location, key contact or critical information for the device.

- Reason for Change – Historical referencing note taking. Will be displayed when looking at historical logs and running reports. After submitting, Reason for Change will be cleared for the next edit.

NOTE

It is highly recommended to have internal policies that require a *Reason for Change* for any edits.

Click **SAVE** to save the device information; otherwise, click **CANCEL**.

Deleting a Device

Deleting a device deletes the device from an account on INSIGHT, including all notification profile settings and sensor data reporting associated with the device. References to the device and its sensors are also removed from notification profiles. However, the sensor configurations remain on the device. Historical data is not removed from INSIGHT as required by auditing requirements.

NOTE

Features may not be available based on the model of the device. Please refer to your **device's manual** for more information.

It is recommended to create a sensor detail log report as a backup before deleting a device. For information about creating a sensor detail log report, see **Creating a Report**.

To delete a device from the account tree:

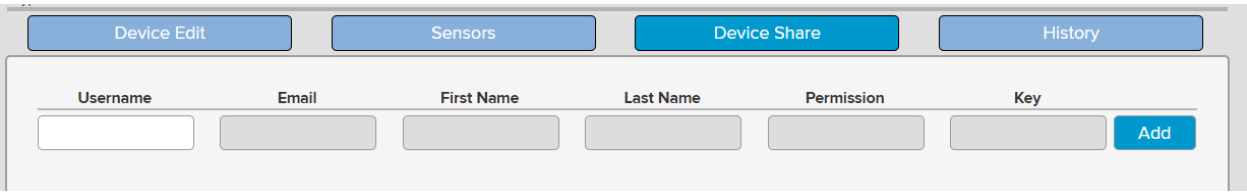
1. Click the Account Administration tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.
2. In the Edit Accounts section, click a device in the account tree.
3. In the Edit Device section, click Delete Device.
4. In the Device Delete Confirmation window, click **YES, I'M SURE** to confirm the deletion; otherwise, click **CANCEL**.

Share a Device

Sharing a device allows a device to be shared beyond its location or account. Users can see a device, as well as control settings, or enable notifications as if the device was in their location, based on their permission. Only an *Owner* of a device can share the device.

To share a device

1. Click the Account Administration tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.
2. In the Edit Accounts section, click a device in the account tree.
3. Click on Device Share on the device navigation.



4. Enter the username of the user you want share the device with.
5. Click Add.

An E-mail will be sent to the users primary E-mail address. You will see <Pending> on all fields except the KEY field. The <Pending> fields will show data once the share is accepted.

Accept a Shared Device as a User

NOTE:
A share can be accepted either by the user, or the owner of the device for the desired user.

1. As a User, you will receive an E-mail, with a Shared Key. This Key is linked specifically to an individual user and a specific device. You cannot share the same Key, the system will reject the device share, if the key and username do not match exactly.
2. Click on your name from the Account Administration
3. Copy and paste the Key, or manually enter the Key under Shared Devices

4. Click on **ADD**.

Accept a Shared Device as the Owner

NOTE

The Owner of the device can accept a share for a user within their own organization if they have *Admin Permissions*. If the Owner has *Reseller Permissions*, they can accept the share for any organization under their *Choose a Customer*.

1. Select the device you want to share under Account Administration.
2. Click on Device Share on the Device Navigation.
3. Copy the Key for the user you want to share the device with.
4. Select the User you want to share the device with.
5. Paste the Key, or manually enter the Key under Shared Devices and click **ADD**.

Delete a Share as a User

NOTE

Deleting a shared device, does not delete the device from the system. It removes the viewing and editing of a device for that specific user. Any user can delete their own shared device, regardless of permission.

1. Select your name under Account Administration.
2. Click on the DELETE icon next to the device under Shared Device.
3. Click on CONFIRM to accept the removal of the share or CANCEL to disregard the change.

Delete the Share as an Owner

1. Select the device you want to stop a shared device under Account Administration.
2. Select Device Share under the device navigation.
3. Select the **DELETE** icon, next to the user you wish to remove from the Shared Device
4. Click on **CONFIRM** to accept the removal of the share or **CANCEL** to disregard the change.

Update Firmware

1. Select the device under Account Administration
2. Select Update Firmware.

NOTE

It is recommended to have someone on site to validate all sensors have reconnected after the firmware update. The device has 30 minutes to complete a firmware update, if unsuccessful, in the case of bad network connection, will fall back to the prior firmware.

Managing Sensors

INSIGHT enables you to modify wired and wireless sensor parameters from a remote location. You can also use INSIGHT to add and delete wired or wireless sensors; wireless sensors may need to reset locally to connect properly to the device.

NOTE

Devices, such as the EA800-ip, do not allow wireless sensors to be added or deleted remotely.

Adding a Sensor

For wiring information about connecting your wired or wireless sensor, see your devices manual for more details.

NOTE

Features or sensor types may not be available based on the model of the device. Please refer to your **device's manual** for more information.

To add a sensor to a device:

1. Click the **Account Administration** tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.

2. In the Edit Accounts section, click a device in the account tree.
3. Click **+Add Hardwired** or **+Add Wireless**.
4. Under Add a New Sensor . . ., select or type values for the following sensor parameters. For details about the sensor parameters, see your **devices Installation/Owner's Manual**.

- Type - Select from the pull-down menu:
  - Temp White, Temp Blue, Temp Red (temperature).
  - PT1000 – RTD sensor with custom range.
  - HA-4 (Humidity), or HAIII-+.
  - WaterBug (water presence).
  - NO Contact, NC Contact (normally open/normally closed contact).
  - 4-20mA Output, or 0-5V output
    - Units – Requires you to select default units, such as °F, °C, RH, PSI or create a custom unit with 3 characters.
- Position - Sensor terminal position (1–4) on the device's circuit board. For information about sensor terminal positions, see your **devices Installation/Owner's Manual**.
- Name/Location - Descriptive name by which to identify the sensor.
- Units - Unit of measure for the sensor. This value cannot be changed after you click **SAVE**, except to delete the sensor and add a new one.
- MKT – Mean Kinetic Temperature. Disabled by default, allows for air (83.1 KJ/mol), glycerin (56.2 KJ/mol) or a custom KJ/mol. Will display on summary reports.
- Low Limit - Sensor value at or below which an alert is issued.
- High Limit - Sensor value at or above which an alert is issued.
- Alert Delay - Time period in minutes to wait before issuing an alert after an alert condition occurs. Values can be 0–120.
- Alert Response Profile - Response profile to use in the event of an alert on this sensor. This profile has precedence over the response profile that is assigned to the connected device. Other than a specific response profile, values can be the following:
  - [Use This Device's Response Profile]—Specifies the response profile that is assigned to the connected device.
  - None - Specifies no response profile.

For more information about response profiles, see **Response Profiles**.

- Relay - Relay terminal number on the device's circuit board to use for output to an external alarm panel. An asterisk (*) next to the relay number means that relay is assigned to at least one other sensor. You can assign a relay to more than one sensor.
- Resolution - For 4–20mA sensors, this parameter specifies accuracy of sensor readings to whole numbers, tenths, hundredths, or thousandths. Values can be 1, .1, .01, or .001.
- Hysteresis – Also called a clearing buffer. Value subtracted from the high limit and added to the low limit defining the thresholds for canceling an alert, thus minimizing recurring alerts. The default is the same as the Resolution parameter and is generally good value to use. Avoid using zero (0).

  Example:
  If a high alarm value was set at 10.0° and hysteresis was set at 0.5°. Once a sensor goes into alarm, it will only clear at 9.5°, or 0.5 below the limit, for a high alarm. A low alarm would be reversed, and clear at 10.5, if the settings were the same.
- 4mA Value - For 4–20mA sensors, the sensor measurement value (usually the lowest) corresponds to a current output of 4mA.
- 20mA Value - For 4–20mA sensors, the sensor measurement value (usually the highest) corresponds to a current output of 20mA.
- Offset - Positive or negative value applied to a sensor to correct a nominal difference between the sensor readings and a certified measurement or reference standard. This parameter is not available for all sensors, and the acceptable values are dependent on the sensor resolution. For temperature sensors, differences of more than 0.5° F may indicate a sensor malfunction.
- Description - Sensor description

5. Click **SAVE** and **ADD** to save the sensor information; otherwise, click **CANCEL**.
6. Click **SAVE** to save the device information; otherwise click **CANCEL**.

Modifying Sensors

To modify a wired or wireless sensor on a device:

1. Click the Account Administration tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.
2. In the Edit Accounts section, click a device in the account tree.
3. Click Sensors on the Device Navigation.

4. Select the sensor to open the details.
5. Make the necessary changes. For more information about the sensor parameters, see **Adding a Sensor**. Some fields will only show on edit or based on permissions.

- Reason for Change – Historical referencing note taking. Will be displayed when looking at historical logs and running reports. After submitting, Reason for Change will be cleared for the next edit.

NOTE

It is recommended to record a Reason for Change for auditing. A *Reason for Change* is stored for each edit on the INSIGHT database.

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6. Click **SAVE** and **ADD** to save the sensor information; otherwise, click **CANCEL**.
7. Click **SAVE** to save the device information; otherwise click **CANCEL**.

View Sensor History

You can view who modified the last 10 sensor edits as well as the *Reason for Change*, on the Sensor History, located at the bottom of the Sensor page.

Winland is designing historical reports that will populate sensor install date, all edits on the sensor, and the delete date, if the sensor has been deleted.

Deleting a Sensor

Deleting a sensor deletes the sensor from the device; the device no longer collects data from the sensor, nor will the sensor trigger any relays. Furthermore, the sensor is also removed from any notification profiles associated with it.

NOTE

It is recommended to backup any data from a sensor prior to deleting. Data is still stored on INSIGHT for 3 years; however, data recovery may require a fee from Winland.

Some devices will not allow you to remotely delete a wireless sensor, such as on the EA800-ip. This is due to being unable to re-add the sensor remotely. You must use EA800-ip keypad as described in the **devices Installation/Owner's Manual**.

To delete a sensor from a device:

1. Click the **Account Administration** tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.
2. In the Edit Accounts section, click a device in the account tree.
3. Click on the Sensors tab and then click on the name of sensor from the list.
4. On the lower right side, DELETE is presented as a button.

NOTE

It is recommended to backup data prior to deletion.
It is recommended to note a *Reason for Change* prior to deletion.

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5. In the Sensor Delete Confirmation window, click **YES, I'M SURE** to confirm the deletion; otherwise, click **CANCEL**.

Managing Locations

A location is a named set of devices and users that enable you to control access to devices. Locations can be added to groupings to create another layer of organization (see **Managing Groupings**). The following sections describe how to add, modify, and delete a location.

Adding a Location

To add a location:

1. Click the **Account Administration** tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.
2. In the Add New section, click Add Location.
3. In the Add Location section, type values for the following fields:
   - Location Name - Descriptive name identifying the location.
   - Primary Contact - Name of the individual at this location who will administrate the device.

- Primary Phone - Telephone number of the primary contact.
- Primary E-mail - E-mail address of the primary contact.
- Location Address, Country, City, State/Province, Zip/Postal Code.
- Description - Optional details about the location.

4. Click **SAVE** to save the location; otherwise click **CANCEL**.
5. In the account tree, drag-and-drop users and devices into the location. For more information about moving users and devices into a location, see **Working with Locations**.

Modifying a Location

To modify a customer location:

1. Click the Account Administration tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.
2. In the Edit Accounts section, click a location in the account tree.
3. In the Edit Location section, make the necessary changes. For detailed information about the location parameters, see **Adding a Location**.
4. Click **SAVE** to save the location; otherwise click **CANCEL**.

Deleting a Location

Deleting a location deletes all member users, devices, and sensors configured to those devices from the INSIGHT database. Furthermore, all past notifications and sensor log data associated with the sensors is also deleted. However, the sensor configurations remain on their respective devices.

Before deleting a location, move all member users and devices to the customer account or another location. Otherwise, create a sensor detail log report as a backup. For information about moving users or devices from a location, see **Working with Locations**. For information about creating a sensor detail log report, see **Creating a Report**.

To delete a location from the account tree:

1. Click the Account Administration tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.

2. In the Edit Accounts section, click a location in the account tree.
3. In the Edit Location section, click Delete Device.
4. In the Location Delete Confirmation window, click **YES, I'M SURE** to confirm the deletion; otherwise, click **CANCEL**.

Managing Groupings

A grouping is a named set of one or more locations that help you organize your account tree. For example, you might create a grouping of all locations in a geographical region. The following sections describe how to add, modify, and delete a grouping.

Adding a Grouping

To add a grouping:

1. Click the Account Administration tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.
2. In the Add New section, click Add Grouping.
3. In the Add Group section, type a name for the grouping.
4. Click **SAVE** to save the grouping; otherwise click **CANCEL**.
5. In the account tree, drag-and-drop locations into the grouping. For more information about moving locations into a grouping, see **Working with Groupings**.

Renaming a Grouping

To rename a grouping:

1. Click the Account Administration tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.
2. In the Edit Accounts section, click a grouping in the account tree.
3. In the Edit Grouping section, type the new name.
4. Click **SAVE** to save the grouping; otherwise click **CANCEL**.

Deleting a Grouping

Deleting a grouping deletes all member locations from the INSIGHT database. This includes all member users, devices, and the sensors configured on those devices.

Furthermore, all past notifications and sensor log data associated with the sensors are deleted also. However, the sensor configurations remain on their respective devices.

NOTE

Features may not be available based on the model of the device. Please refer to your **device's manual** for more information.

Consider creating a sensor detail log report as a backup before deleting groupings. For information about creating a sensor detail log report, see **Creating a Report**.
For information about removing a location from a grouping without deleting the location from the INSIGHT database, see **Working with Groupings**.

To delete a grouping from the account tree:

1. Click the Account Administration tab.
   - If you are a reseller, in the Choose a Customer section, click the customer account name.
   - If you are not a reseller, proceed to Step 2.
2. In the Edit Accounts section, click a grouping in the account tree.
3. In the Edit Grouping section, click Delete Grouping.
4. In the Grouping Delete Confirmation window, click **YES, I'M SURE** to confirm the deletion; otherwise, click **CANCEL**.

5 Managing Reports

INSIGHT provides several sensor log and alert reports with which to track the activity of your monitored environments. You can create reports on-demand for selected sensors, or you can automatically generate and deliver reports periodically to interested users by E-mail.

Report creation or modification is a three-step process characterized by the step buttons on the Reports page. Click on these buttons as needed to move back and forth in the process to review or change settings.

Creating a Report

To create a report:

1. Click the Reports tab.
2. In the Choose Report step, under Create a New Report, type a name in the Report Name field.
3. Under Choose a new report type, click one of the report types, and then click **CREATE**. The following report types are available:
   - **Sensor Detail Log** - Lists the readings for the selected sensors at the data collection interval over the specified timeframe (1–31 days). A summary of the minimum, maximum, and average readings is included.
   - **Sensor Summary Log** - Plots the readings in a graph for the sensors on a selected device over the specified timeframe (1–31 days). The graph also shows the low and high limits. A summary of the minimum, maximum, and average readings is included.
   - **Sensor Acknowledgment Log** - Lists information about acknowledged readings for the selected sensors over the specified timeframe (1–31 days) including: time and date, username, sensor reading, reading units, sensor status, and acknowledgment notes.
   - **Alert Report by Location** - Plots a bar graph showing the number of alerts per device at selected locations over the specified timeframe (1–31 days). For HTML output only, click a bar to show a graph of the number of alerts per sensor at that location.
   - **Alert Report by Device** - Plots a bar graph showing the number of alerts against each sensor on the selected device over the specified timeframe (1–31 days). Click a bar to show detailed alert information for that sensor.
   - **Alert Response Summary** - Lists the alerts for which a response profile was performed, for selected sensors over the specified timeframe (1–31 days). The

report includes the responder's username, actions completed, actions not completed, and responder's notes.

4. In the *Choose Devices* step, select one or more sensors in the device tree by customer account, by all devices, by device, by grouping, by location, or by individual sensor. Click **CONTINUE**.
5. In the Choose Output step, choose the report output type. Click **PDF**, **HTML**, or **CSV**.
   - **CSV** output is available only for Sensor Detail Log reports and Alert reports by device. Users must have *Reseller Permission* or *Admin Permission*.
   - **CSV** and **PDF** files are created in a folder according to your browser download settings.
6. Click the Start Date and End Date fields to specify the timeframe for which to collect sensor data from the INSIGHT database. The report starts at 12:00 AM on the start date and ends at 12:00 AM on the end date.
7. Select a time zone from the Time Zone pull-down menu that corresponds to the dates you entered in Step 6. Consider the locations of your report recipients when choosing a time zone.
8. To save this report, check the Save Report check box. Saved reports appear in the Saved Reports table.
9. Click **CREATE REPORT**.

Scheduling a Report

To schedule a report:

Click the Reports tab.

1. In the Choose Reports step, do one of the following:
   - Under Create a New Report, type a name in the Report Name field. Under Choose a new report type, click one of the report types, and then click **CREATE**.
   - Under Saved Reports, click on a report.
2. In the Choose Devices step, select one or more sensors in the device tree by customer account, by all devices, by device, by grouping, by location, or by individual sensor. Click **CONTINUE**.
3. In the Choose Output step, click **Schedule**.
4. In the Frequency field, choose the schedule frequency. Select **Daily**, **Weekly**, or **Monthly** from the pull-down menu.

For a daily schedule:

a. In the Time to Run field, choose the time of day to create the report. Select the hour and time zone from their respective pull-down menus.

b. In the Report Start/End Time field, choose the time from which to collect sensor data from the INSIGHT database for the previous 24 hours. Select the hour and time zone from their respective pull-down menus. The Report Start/End Time should be before the Time to Run.

c. In the Subscribers pull-down menu, select the users who will receive the PDF report by E-mail.

For a weekly schedule:

a. In the Time to Run field, choose the time of day to create the report. Select the hour and time zone from their respective pull-down menus.

b. In the Day to Run pull-down menu, select the day to create the report.

c. In the Report Start/End Time field, choose the time of day from which to collect sensor data for the previous week. Select the hour and time zone from their respective pull-down menus. The Report Start/End Time should be before the Time to Run.

d. In the Subscribers pull-down menu, select the users who will receive the PDF report by E-mail.

For a monthly schedule:

a. In the Time to Run field, choose the time of day to create the report. Select the hour and time zone from their respective pull-down menus.

b. In the Day to Run pull-down menu, select the day of the month to create the report.

c. In the Report Start/End Time field, choose the time of day to begin collecting sensor data for the previous month. Select the hour and time zone from their respective pull-down menus. The Report Start/End Time should be before the Time to Run.

d. In the Subscribers pull-down menu, select the users who will receive the PDF report by E-mail.

6. Click **SCHEDULE REPORT**.

Modifying a Saved or Scheduled Report

To modify a saved or scheduled report:

1. Click the Reports tab.
2. In the Choose Reports step, under Saved Reports or Scheduled Reports, click on a report.
3. In the Choose Devices step, modify the sensor selections in the device tree as needed, and then click **CONTINUE**.
4. In the Choose Output step, make changes to the output type, time period, time zone, and subscribers as needed.
5. Click **CREATE REPORT**.

Deleting a Saved or Scheduled Report

To delete a saved or schedule report:

1. Click the Reports tab.

2. In the Choose Reports window, under Saved Reports or Scheduled Reports, choose a report you want to delete, and click next to the entry.

3. In the Report Delete Confirmation window, click **YES, I'M SURE** to confirm the deletion; otherwise, click **CANCEL**.

6 Managing Profiles

A profile is a named set of data that can be referenced and reused in the configuration of User, devices, and sensors. The INSIGHT platform uses two types of profiles: notification profiles and response profiles.

Notification Profiles

A notification profile is a named list of sensors for which a user can receive an E-Mail notification when an alert condition occurs. To implement a notification profile, you must specify a notification profile in the *User*, either when you add the *User* or by modifying the *User*. For more information about adding and modifying *Users*, see **Managing Users**.

NOTE

If you do not specify a notification profile for a user under their *Edit User*, the user will not receive any notifications, including condition alerts, offline alerts, and alert reminders.

The following subsections describe how to add, modify, and delete a notification profile.

Adding a Notification Profile

To add a notification profile:

1. Click the Profiles tab.
2. In the Create or edit profiles section, under Notification Profiles, click **+Add Profile**.
3. In the Add Notification Profile column, type a descriptive name in the Notification Profile Name field.
4. In the Description field, type optional details about the profile's purpose and use.
5. In the device tree, check the check boxes next to the sensors for which you want to send alert notifications by E-mail. You can select individual sensors, or you can select all sensors associated with the customer account, with a device, with a location, or with a grouping.
6. Click **SAVE** to save the notification profile; otherwise, click **CANCEL**.

Modifying a Notification Profile

To modify a notification profile:

1. Click the Profiles tab.
2. In the Create or edit profiles column, under Notification Profiles, click on a profile name in the list of notification profiles.
3. In the Edit Notification Profile column, make the necessary changes to the profile parameters. For more information about the notification profile parameters, see **Adding a Notification Profile**.
4. Click SAVE to save the changes; otherwise, click **CANCEL**.

Deleting a Notification Profile

Deleting a notification profile removes that notification profile from *User* configurations, affecting what notifications users receive. If necessary, update your *Users* configurations before deleting a notification profile. For information about modifying a *User*, see **Modifying a User**.

To delete a notification profile:

1. Click the Profiles tab.
2. In the Create or edit profiles column, under Notification Profiles, click on a profile name in the list of notification profiles.
3. In the Edit Notification Profile column, click Delete Profile.
4. In the Delete Profile Confirmation column, click **YES, I'M SURE** to confirm the deletion; otherwise, click **CANCEL**.

Response Profiles

A response profile is a named list of actions that you are prompted to perform when an alert condition occurs involving one or more sensors (see **Responding to an Alert**). The response profile also enables you to specify which actions are required according to your SOP. The following subsections describe how to add, modify, and delete a response profile.

To implement a response profile, you must specify the profile as part of a device or sensor definition. You can specify a response profile for all sensors connected to a device or for individual sensors. The former profile is called a device response profile, and the latter is called a sensor response profile. When an alert condition occurs, a sensor response profile has precedence over the device response profile.

- For information about specifying a device response profile, see **Modifying a Device**.
- For information about specifying a sensor response profile, see **Adding a Sensor** and **Modifying Sensors**.

Adding a Response Profile

To add a response profile:

1. Click the Profiles tab.
2. In the Create or edit profiles column, under Response Profiles, click +Add Profile.
3. In the Add Response Profile column, descriptive name in the Responses Profile Name field.
4. In the Description field, type additional optional profile details.
5. Choose whether to require that all actions be performed to complete the profile.
   - If the check box is unchecked, all required actions must be performed to complete the profile.

- If the check box is checked, required actions need not be performed to complete the profile.

6. In the Action 1 field, type the first action. Indicate in the corresponding check boxes whether this action is required, and whether a comment is required.
7. If additional actions are required, click +Add Another Action, and then repeat Step 6. To delete an action, click .
8. Click **SAVE** to save the response profile; otherwise, click **CANCEL**.

Modifying a Response Profile

To modify a response profile:

1. Click the Profiles tab.
2. In the Create or edit profiles section, under Response Profiles, click on a profile name in the list of response profiles.
3. In the Edit Response Profile section, make the necessary changes to the response profile parameters. For more information about the response profile parameters, see Adding a Response Profile.
4. Click **SAVE** to save the changes; otherwise, click **CANCEL**.

Deleting a Response Profile

Deleting a response profile removes that response profile from device and sensor configurations. If necessary, update your device and sensor configurations before deleting the response profile. For information about specifying a response profile, see **Modifying a Device** and **Modifying Sensors**.

To delete a response profile:

1. Click the Profiles tab.
2. In the Create or edit profiles section, under Response Profiles, click on a profile name in the list of response profiles.
3. In the Edit Response Profile section, click Delete Profile.
4. In the Delete Profile Confirmation window, click **YES, I'M SURE** to confirm the deletion; otherwise, click **CANCEL**.

Glossary

Account Tree
The hierarchical representation of users, devices, locations, and groupings associated with a customer account.

Acknowledgment
The validation of a sensor reading by a human being.

Admin Permission
The permission assigned to a user that enables a user to manage *User*, devices and sensors, locations, groupings, and profiles for a single customer account. See *Reseller Permission* and *User Permission*.

Alert
The status assigned to a sensor, or the device to which it is connected, when an abnormal condition occurs.

Customer
A company or an individual that purchases the INSIGHT platform for use.

Customer Account
The customer's name and supporting information that identifies the customer to the INSIGHT platform. A reseller's account can add customer accounts.

Dashboard
Graphic presentation of the devices in your monitored environment showing device and sensor status. The dashboard has three views: Device Overview, Device List View, and Map View.

Device
An EA800-ip or an EA*Pro*-GTWY and its connected sensors.

Grouping
A named set of locations that aid in visually organizing the account tree.

Location
A named set of users and devices associated with a street address. Users assigned to a location have access only to those devices assigned to the same location.

Notification Profile
A named set of sensors for which a user may request to receive an E-mail, E-mail to SMS, or a push notification in the event of an alert.

Reseller

An individual or company that purchases the INSIGHT service from Winland Electronics for resale to its customers.

Reseller Permission

Permission assigned to a user that enables a reseller to create and manage customer accounts. This permission grants the most control. See *Admin Permission* and *User Permission*.

Response

An action or procedure performed in response to an alert.

Response Profile

A named sequence of actions to perform in the event of an alert. You can specify a response profile for individual sensors (sensor response profile) or for all sensors connected to a device (device response profile).

Sensor

An instrument that measures an environmental condition, such as temperature, humidity, or electrical continuity. Sensors can be wired or wireless.

Standard Operating Procedures (SOP)

Approved and documented procedures that an organization uses to conduct its business.

User

The username and supporting information that gives an individual access to the INSIGHT platform.

User Permission

Permission assigned to a user that enables a user to monitor sensors and generate reports. This is the most restrictive permission level. See *Admin Permission* and *Reseller Permission*.