C4

LOCAL AND REMOTE MONITORING APPLICATION

VERSION 3.0

SMARTRISE

Document History

Date	Version	Summary of Changes
September 8, 2021	3.0	Added RM application
June 25, 2021	2.0	Updated information with more detail and added screen shots
July 29, 2020	1.0	Initial Submittal

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1 Local and Remote Monitoring Applications

The Local Monitoring (LM) and the Remote Monitoring (RM) applications provide authorized users the ability to access one or more of their elevators from a computer. The application provides real-time tracking of elevators via a web browser, access reporting functions, and use command and control features.

The LM can handle multiple Groups on the same site while the RM can handle multiple contractors and sites with multiple groups.

The following web browsers are compatible with the LM and RM application.

- Mozilla Firefox
- Google Chrome
- Microsoft Edge (Chrome Edition)

2 Features

The LM and RM consist of an array of features.

The table below lists the features of the LM and RM applications.

Table 1 Features for LM & RM Applications

Module	Description	LM	RM
Dashboard	Allows an authorized user to access features depending on user permissions.		X
Monitoring	Visually monitor one or more elevator groups in one of four different Elevator Views: • Small • Compact • Normal • Tall Perform a car call using the car call model, click on the available cars in group/ bank. Perform a hall call using the hall call model, click on the group. The Monitoring module displays the following: • Current Connection of Group/ Bank • Current Mode of Car • Car animations for Current Floor • Car animations for Door State • Destination Floor • Car Call Indicators • Hall Call Indicators • Direction Arrow Indicator	X	X

Module	Description	LM	RM
Fault	Allows authorized users to monitor Fault details encountered per car for several groups. Records can be sorted and searched by: • Fault Number • Fault Name • Description • Solution • Date & Time View the details of each record, click on Action. Delete all fault records for **all** groups and **all** cars, click Clear All Faults.	X	X
Alarms	Allows authorized users to monitor Alarm details encountered per car for several groups per contractors and sites. Records can be sorted and searched by: • Alarm Number • Alarm Name • Description • Solution • Date & Time View the details of each record, click on Action. Delete all Alarm records for **all** groups and **all** cars, click on Clear All Alarms.	X	X
Reports	Allows authorized users to view a summary of records related to monitoring, faults, alarms, car calls, and hall calls per group. Reports can be exported as pdf files.	X	X
Car Calls	Allows authorized users to perform car calls per car for each group by the Local Monitoring Module. Allows authorized users to perform car calls per car for each group available at Contractors and Sites monitored by the Remote Monitoring Module.	X	X
Hall Calls	Allows authorized users to perform hall calls per group. Allows authorized users to perform hall calls per groups available at Contractors and Sites monitored by the Remote Monitoring Module.	X	X
Security	Allows authorized users to specify secured floors for car call per car for each group. Users can secure or unsecure floors individually or all once.	X	X

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Module	Description	LM	RM
Scheduler	Allows authorized users to set the schedules of secured floors for car call per group or groups available in Contractors and Sites. Schedules are triggered once the schedule's start time matches the NUC's current time (the NUC is where LM is installed). Schedules can be set by: • One time only • Selected days of the week • Monthly occurrence of day of week • Yearly	X	X
Parking	Allows authorized users to select parking options. See the *C4 GUI Manual.*	X	X
Contractor	Allows authorized users to manage contractor records. Users can add, edit, and delete contractor details. Records can be filtered differently based on the user's role. Records can be sorted and searched by the details on the list.		X
Sites	Allows authorized users to manage site records. Users can add, edit, and delete site details. Records can be filtered differently based on the user's role. Records can be sorted and searched by the details on the list.		X
Jobs	Allows authorized users to manage job records. Users can add, edit, and delete job details. Records can be filtered differently based on the user's role. Records can be sorted and searched by the details on the list.		X

3   Login Page

The Login Page requires user identification and authentication, prompting users for their Username and Password to access LM and RM applications. The user can toggle Password visibility via the eye icon in the Password input field.
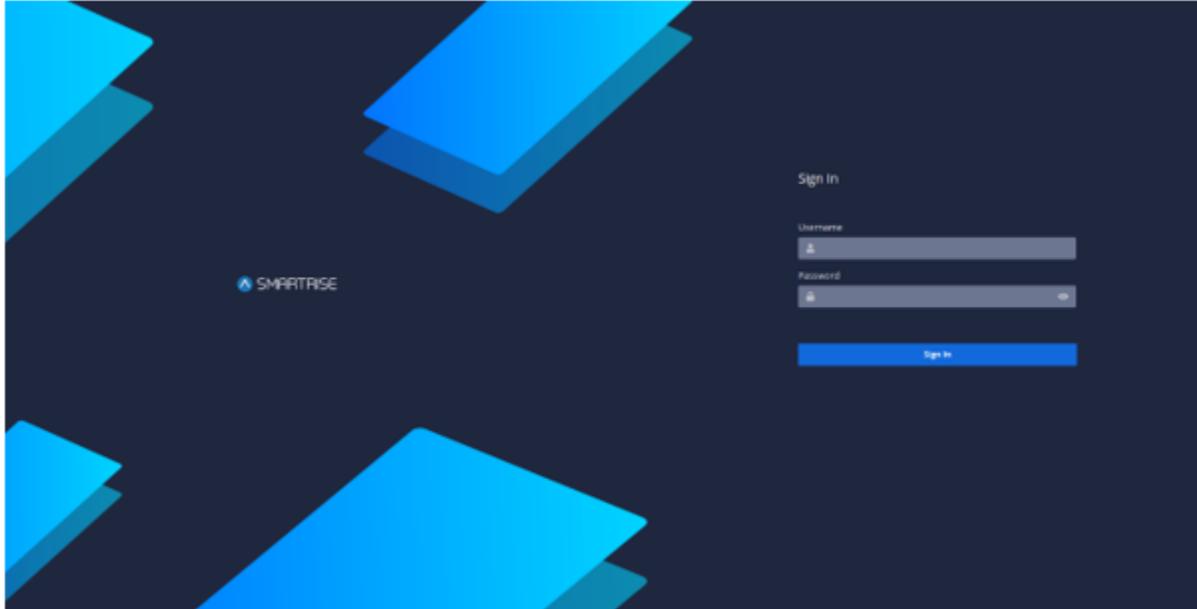
Figure 1: Login Page

4   Header

The Header consists of three key components:

- Hamburger Menu
- Toggle Dark/Light Theme
- User Account

Figure 2: Header

4.1   Hamburger Menu

The Hamburger menu collapses the Navbar at the left of the screen, leaving only the informative icons displayed. When the user hovers the mouse over the Navbar menu, the labels are displayed again.

Figure 3: Collapsible Navbar

4.2 Toggle Dark/Light Theme

The Toggle Dark/ Light Theme allows users to customize their navigation mode according to their own preferences. The idea behind dark theme is that it reduces the light emitted by the device while maintaining the minimum color-contrast ratio required for readability.
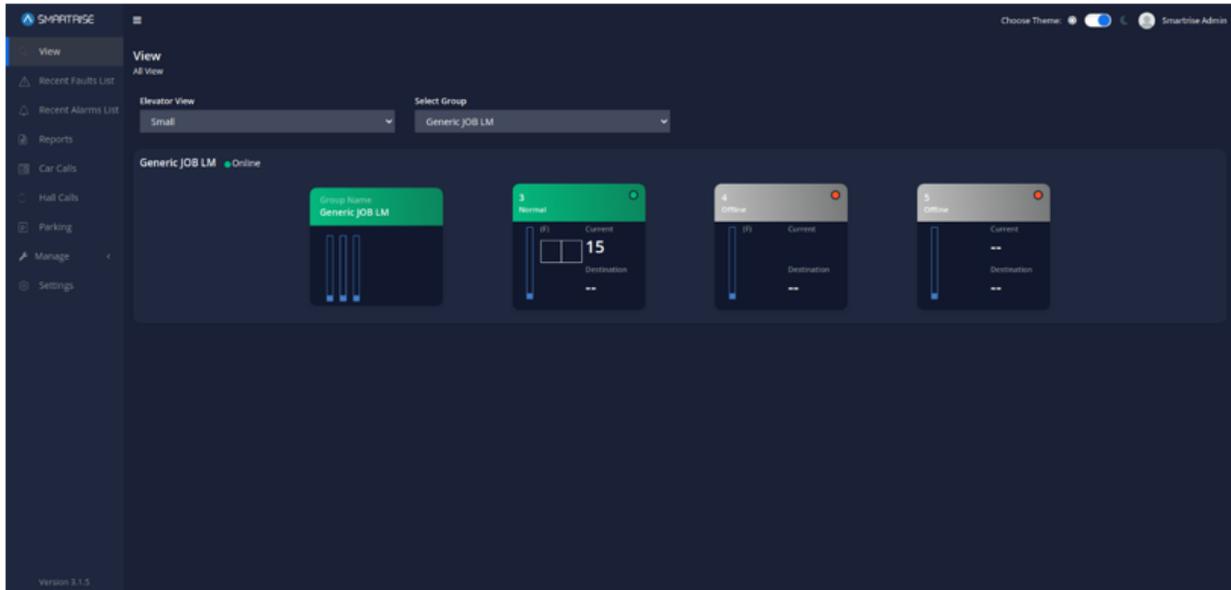
Figure 4: Dark Theme View

4.3 User Account

The User Account displays the username and email along with a Sign Out button to exit the application.
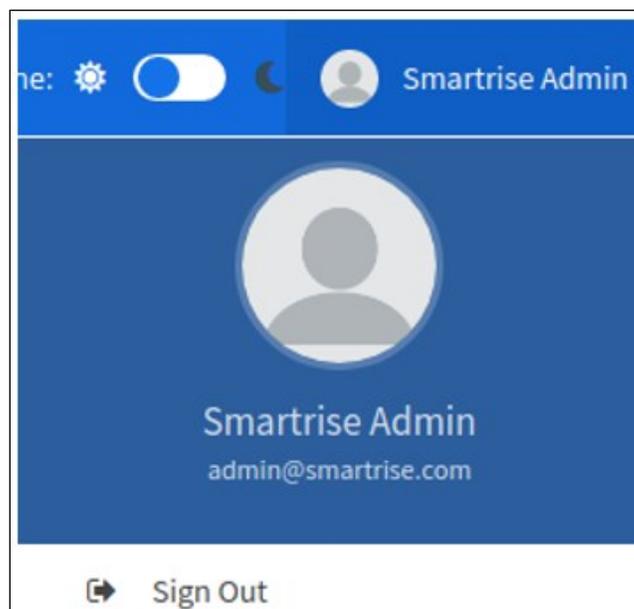
Figure 5: User Account

5   Navbar

The Navbar is displayed at the left of the screen and expanded by default. It consists of a set of menu options to navigate through the application. A footnote of the application Version is included at the bottom of the Navbar.
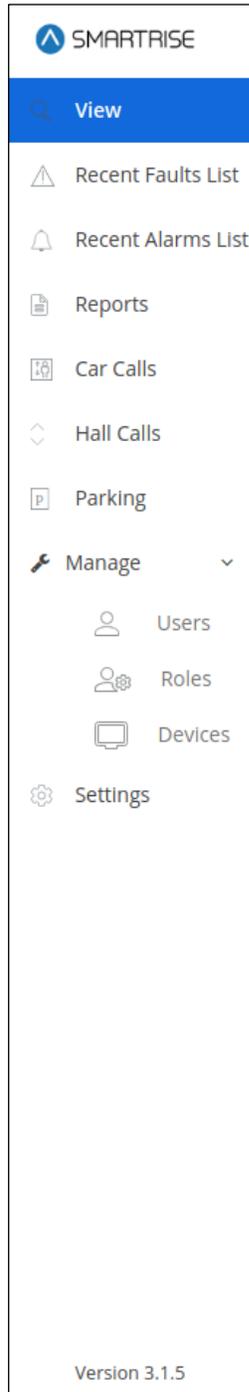
Figure 6: Navbar – LM
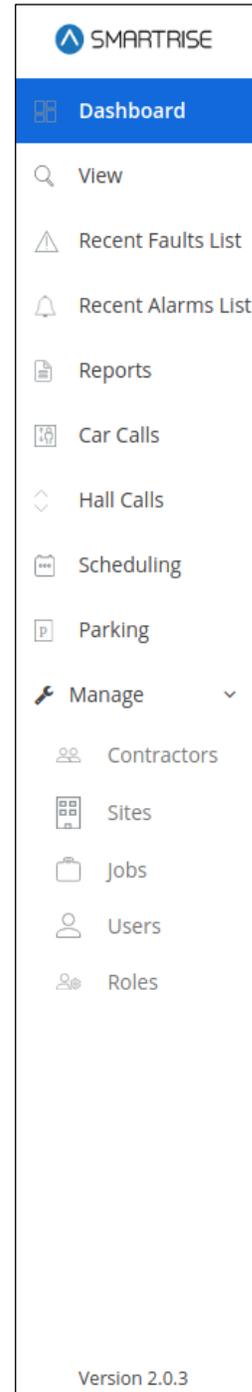
Figure 7: Navbar – RM

6   View – Local Monitoring

In the LM application, the View module displays the current status of all monitored cars per group. A user can select one of four options to view the status from the Elevator View drop-down.

- Small
- Compact
- Normal
- Tall

Figure 8: Small View-LM

Figure 9: Compact View-LM
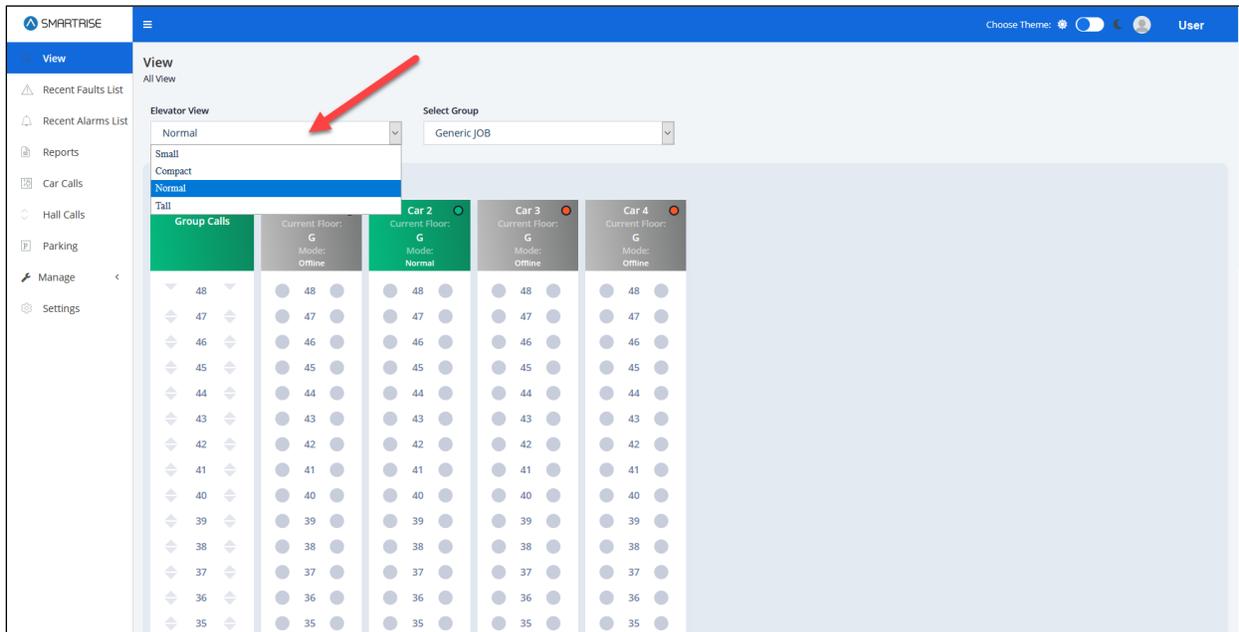
Figure 10: Normal View-LM Part 1 of 2
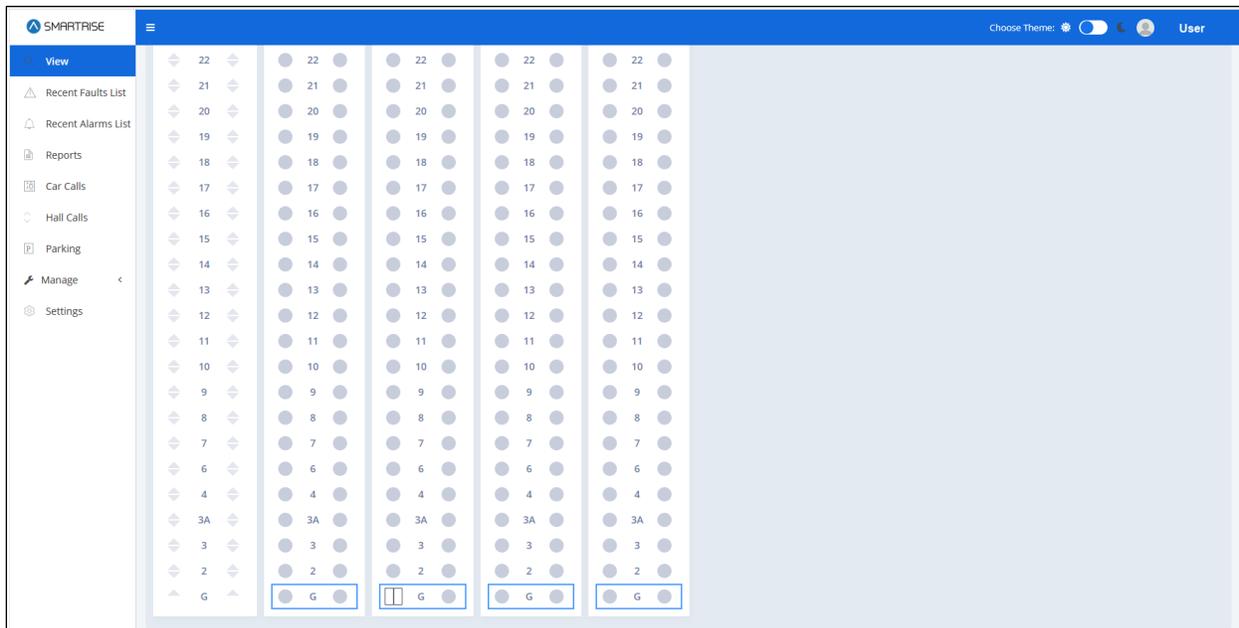
Figure 11: Normal View-LM Part 2 of 2
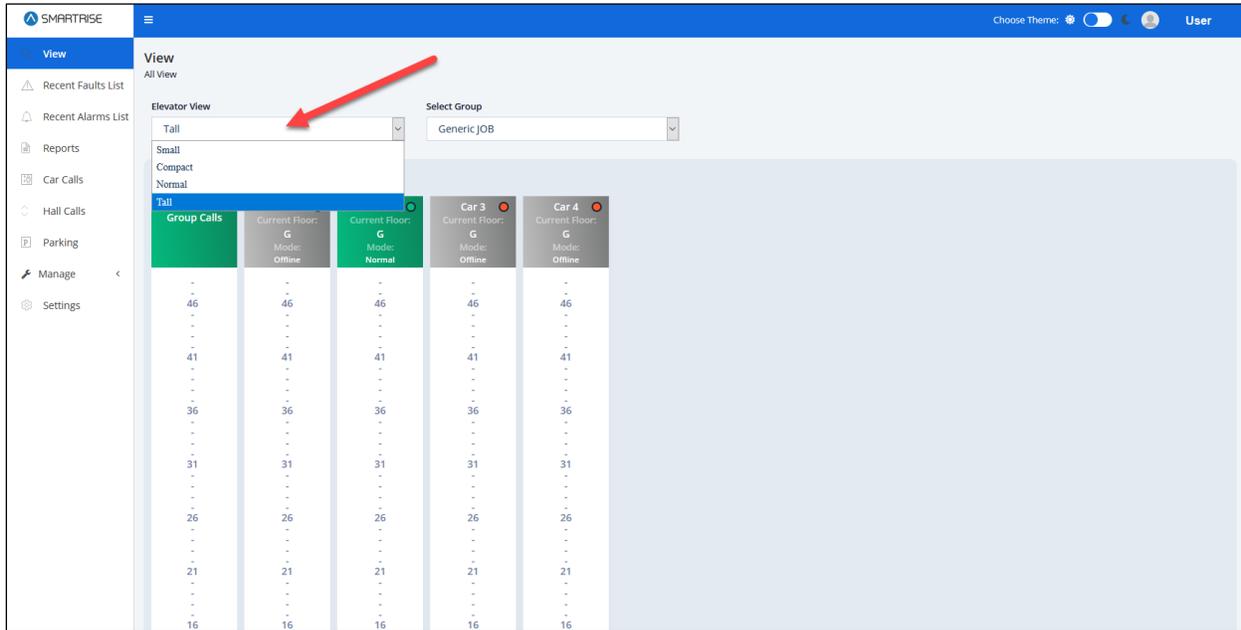
Figure 12: Tall View-LM Part 1 of 2
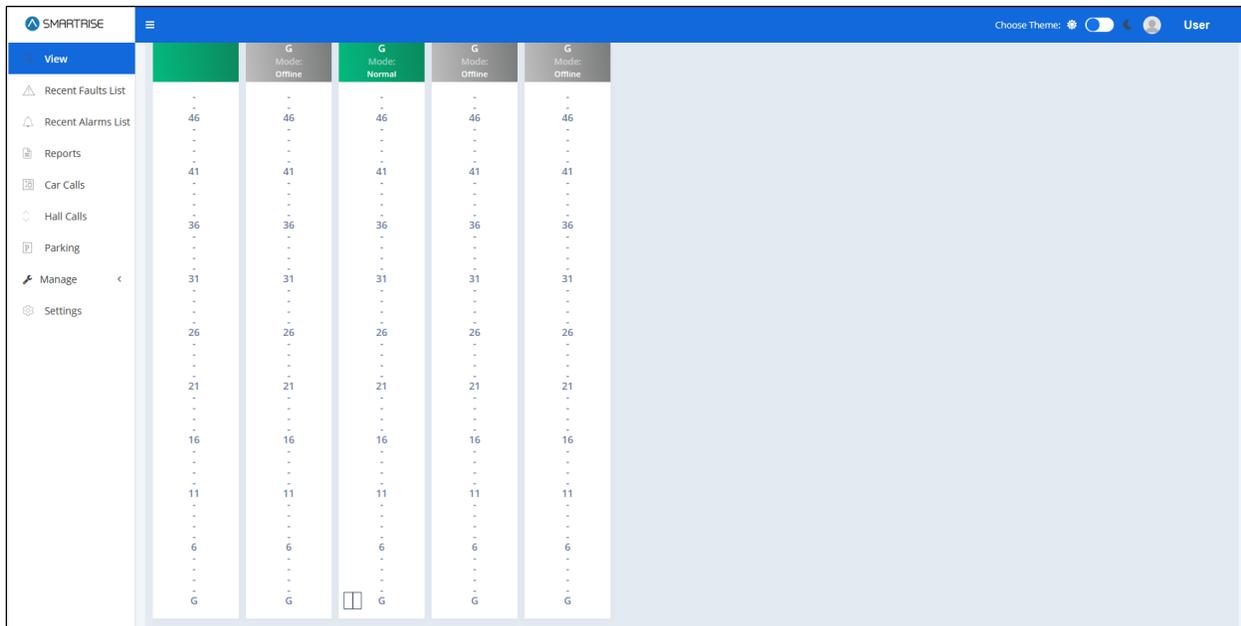
Figure 13: Tall View-LM Part 2 of 2

Cars are displayed per group in the form of models and color-coded based on their status.

- Green – Normal
- Gray – Offline
- Blue – Independent Service

6.1 Group Model-LM

The Group Model consists of the Group Name, Group Status (color-coded), Hall Call Indicators, and Number of Cars. To perform a hall call using the hall call model, click on the group model.

Enter Hall Call consists of two sections:

- Front
- Rear

NOTE: The user can perform a hall call by clicking on a desired floor and tracking the nearest car's behavior.

Figure 14: Enter Hall Call-LM

Group Controls informs the user about the Group Status.
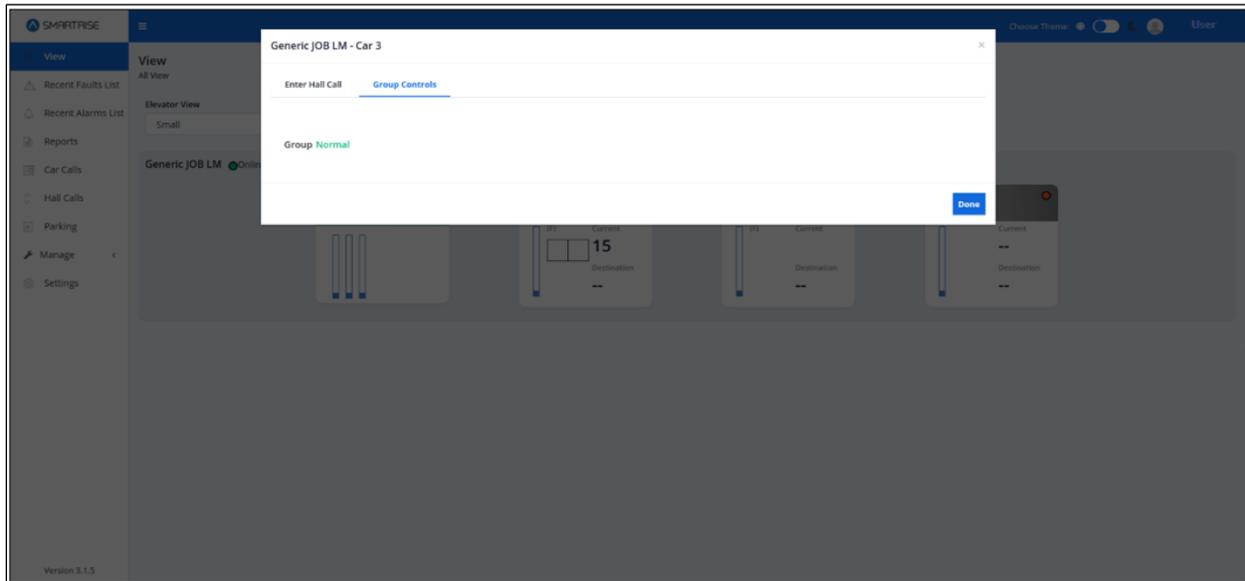
Figure 15: Group Control-LM

6.2   Car Model-LM

The Car Model consists of the Car Name, Status, Current Floor, Destination Floor, Door State, Car Call Indicators, and a Direction Arrow Indicator. To perform a car call using the car call model, click on the car model.

Enter Car Call – consists of two sections:

- Front
- Rear

NOTE: If the Car does not have a front or rear door for certain floors, the floor will be omitted from the display in the Front or Rear section. The user can perform a car call by clicking on a desired floor and tracking the car's behavior.

Figure 16: Enter Car Call-LM

Car Controls – consists of two sections:

- Section 1 – Informs the user about the Car Number, Status (color-coded), Current Floor, Car Speed, and Door State.
- Section 2 – Includes a set of car controls lined with the Turn On switch.
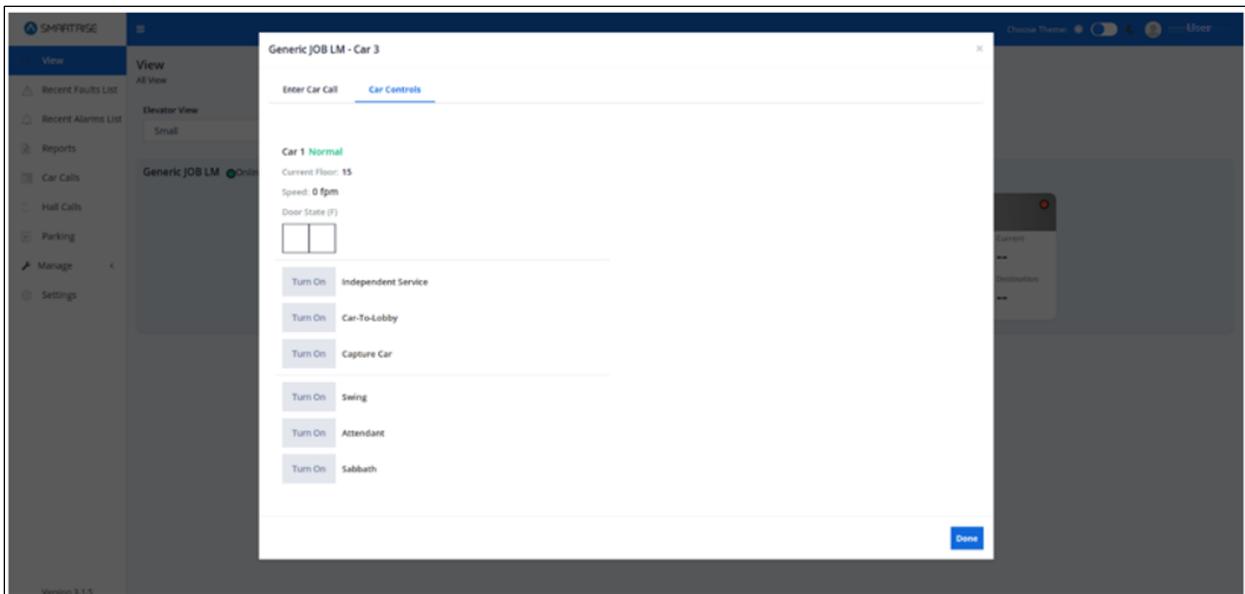
Figure 17: Car Controls-LM

7   View – Remote Monitoring

In the RM application, the View module displays the current status of all monitored cars per group/ bank, per contactor, and per site. Similarly, to the LM application a user can select one of four options to view the status from the Elevator View drop-down list.

- Small
- Compact
- Normal
- Tall

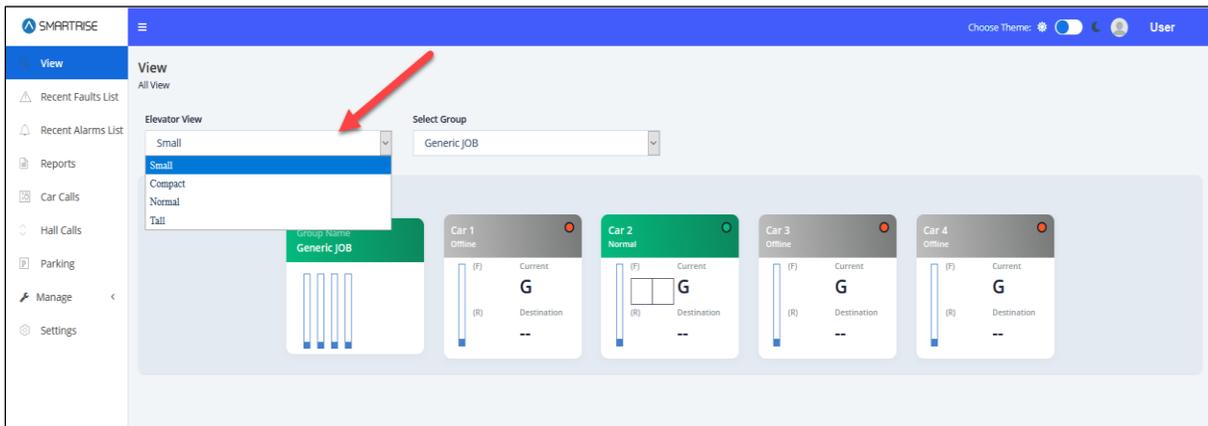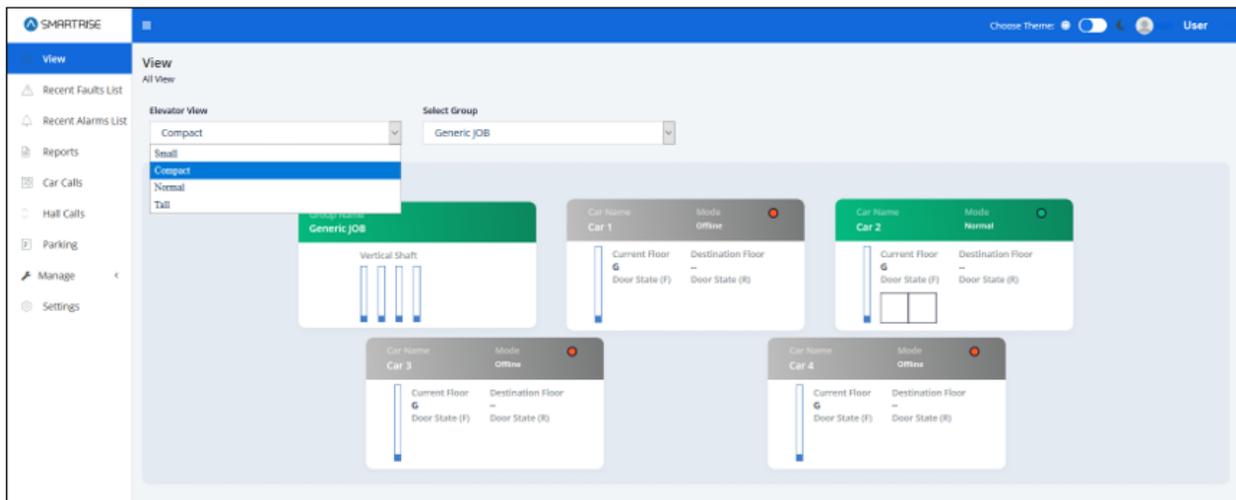Cars are displayed per group/ bank, per contactor, and per site. in the form of models and color-coded based on their status.

- Green – Normal
- Gray – Offline
- Blue – Independent Service

NOTE: The difference between the RM and LM applications is the RM application does not feature the Car/Group Controls tabs.
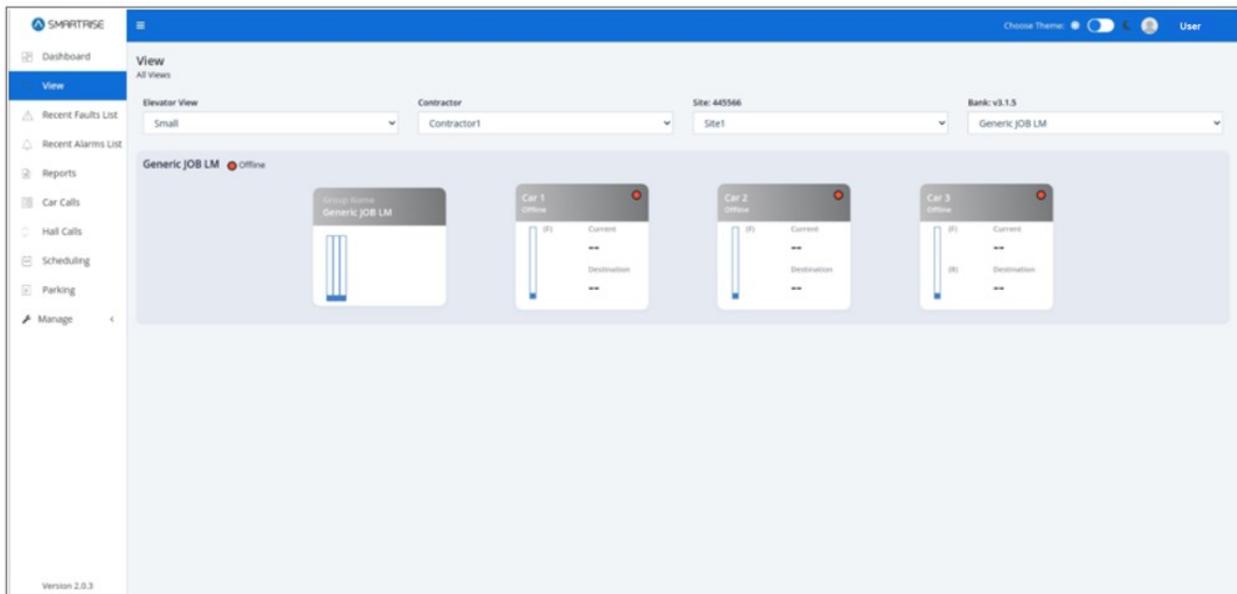
Figure 18: Small View-RM
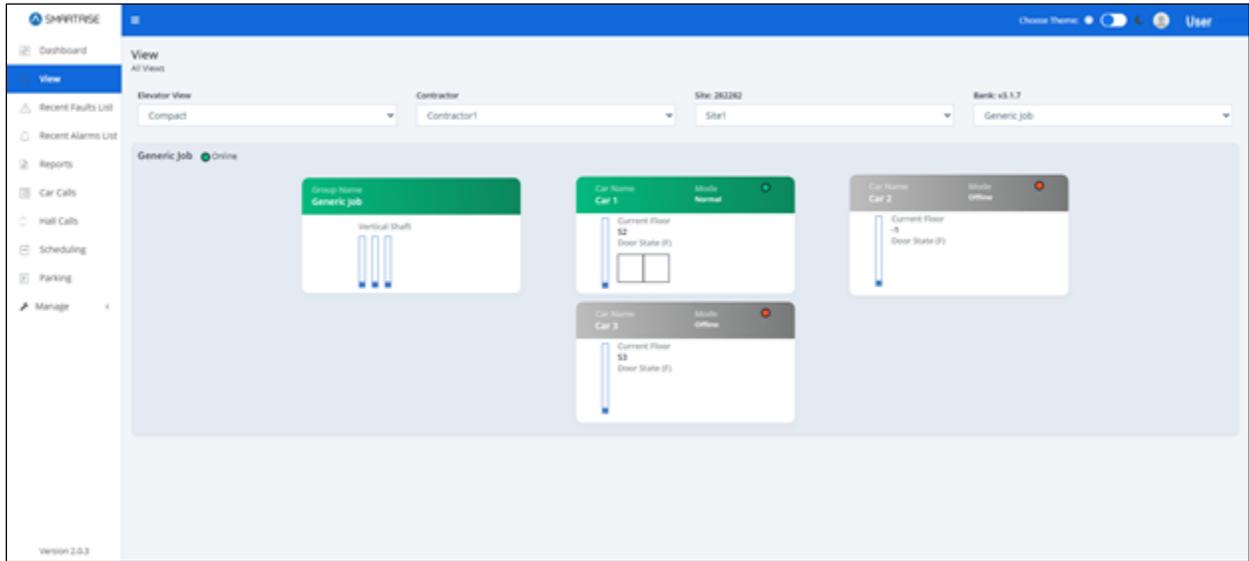
Figure 19: Compact View-RM
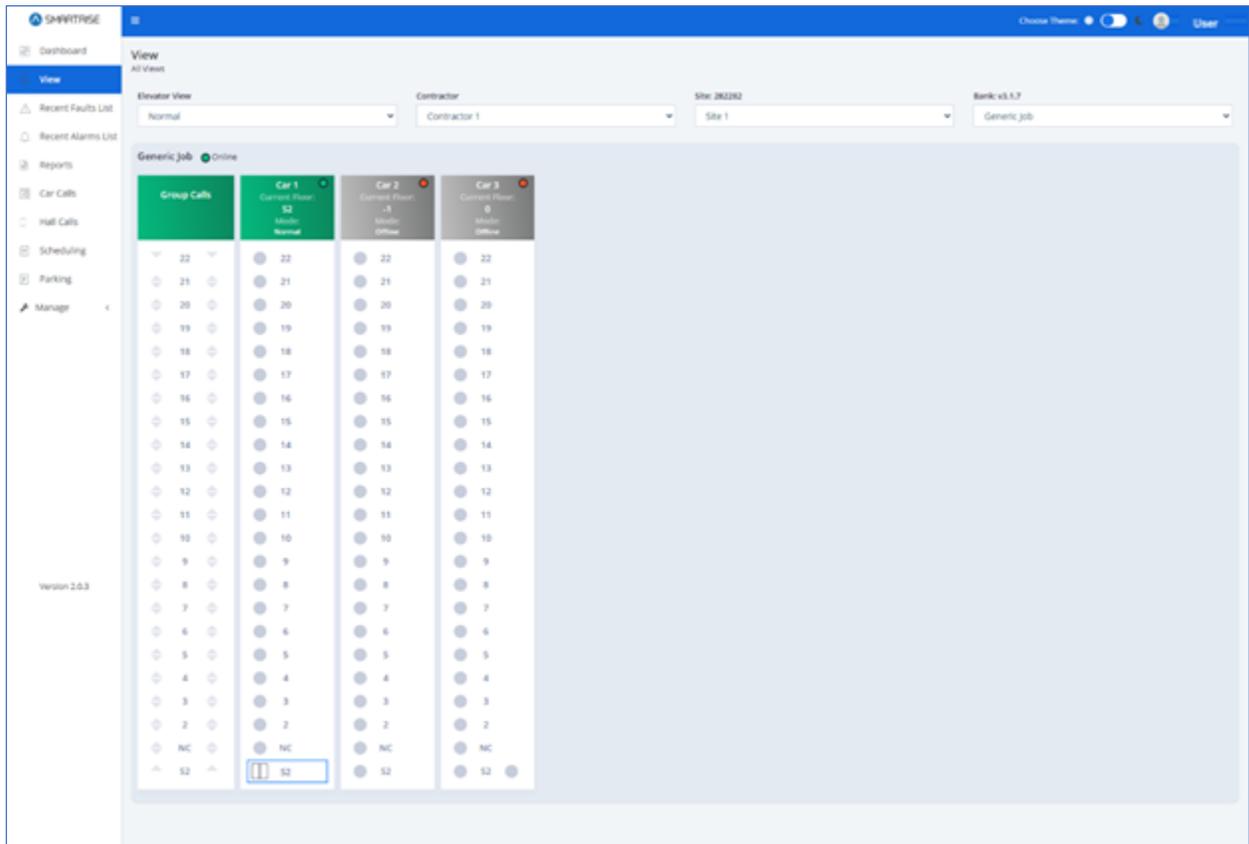
Figure 20: Normal View-RM
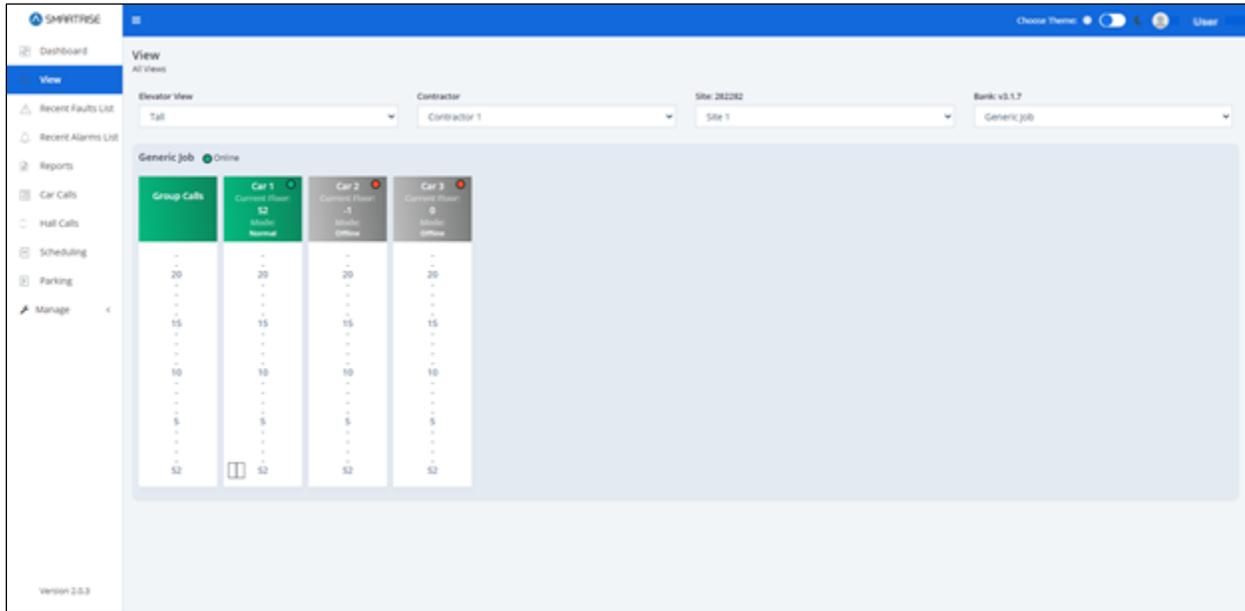
Figure 21: Tall View-RM

7.1   Group Model-RM

The Group Model consists of the Job Name.

Enter Car Call – Consists of two sections:

- Front
- Rear

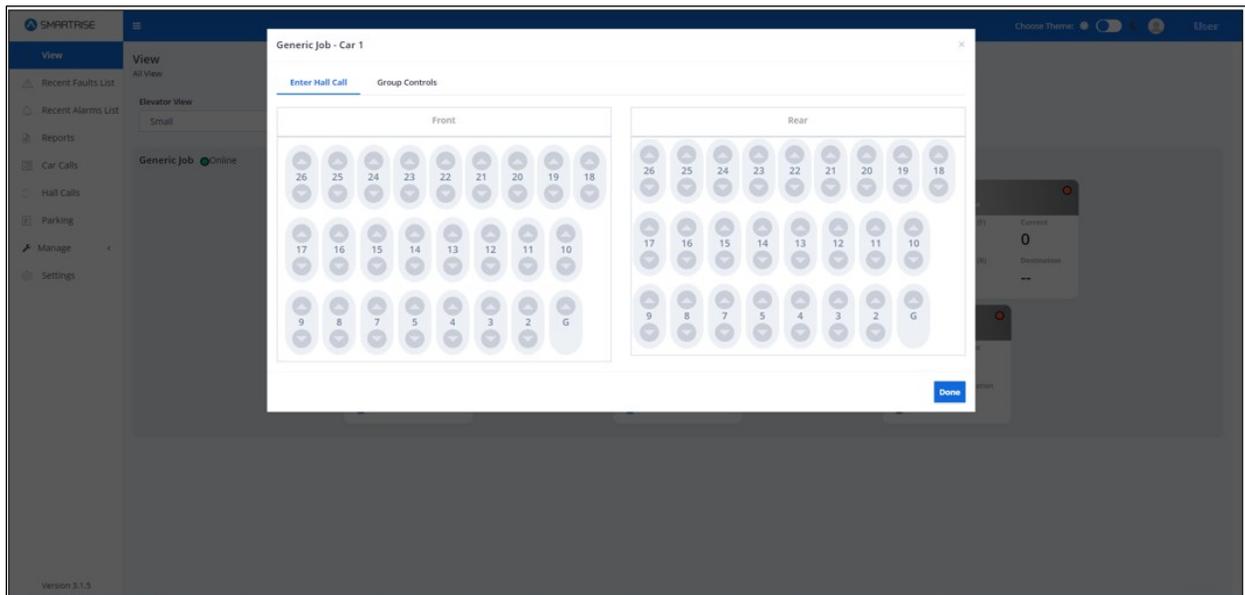**NOTE**: The user can perform a hall call by clicking on a desired floor and tracking the nearest car's behavior.
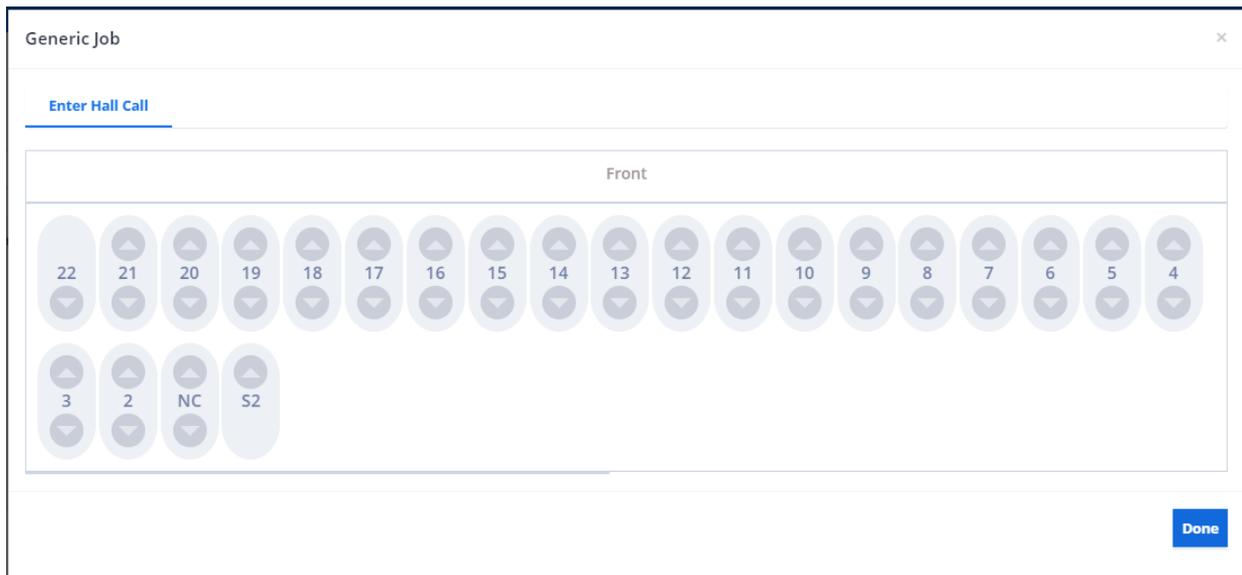
Figure 22: Enter Hall Call-RM

7.2   Car Model-RM

The Car Model consists of the Job Name.

Enter Car Call – Consists of two sections:

- Front
- Rear

NOTE: If the car does not have a front or rear door for certain floors, the floor will be omitted from the display in the Front or Rear section. The user can perform a car call by clicking on a desired floor and tracking the car's behavior.
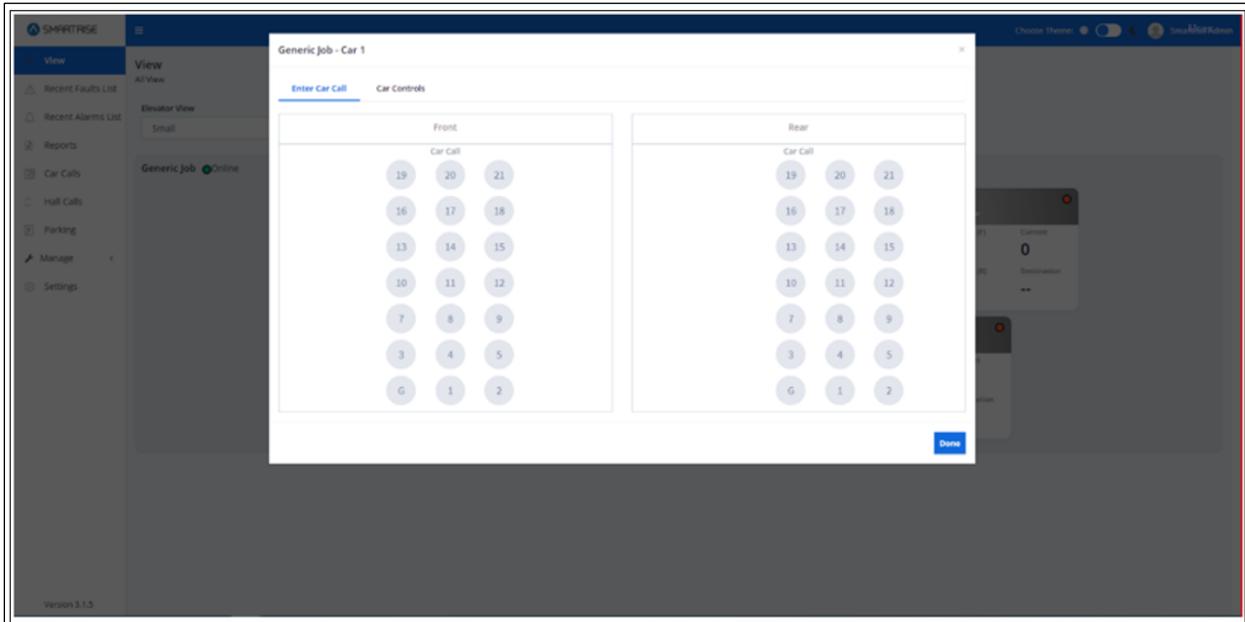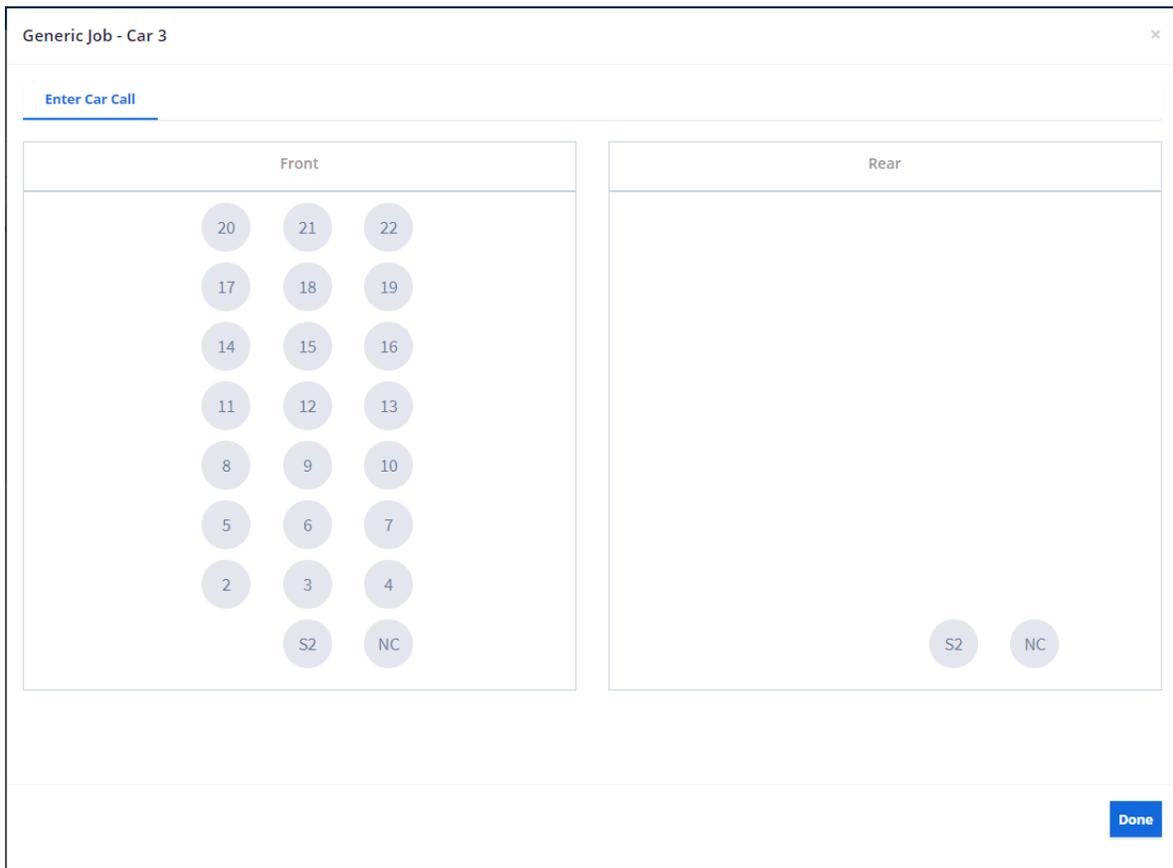

Figure 23: Enter Car Call-RM

8   Recent Faults List

In the LM application, the Recent Faults Module shows a list of faults for a selected car, per group. In the RM application, the Recent Faults Module shows a list of faults for all monitored cars per group/ bank, per contactor, and per site. To view a list of faults for a car, click on the Car Number tab.

Records can be filtered and searched by:

- Fault Number
- Fault Name
- Description
- Solution
- Date & Time

The table below lists the main components for Faults.

Table 2: Main Components for Faults

Components	Position	Function
Search Bar	Top-Right	Browse through the faults of a selected car
Entries Drop-Down	Bottom-Left	Customize the listing display by adjusting the number of entries shown per page
Pagination Buttons	Bottom-Right	Seamlessly navigate through the listing
Clear All Faults	Top of Search Bar	Delete all fault records for **all** groups and **all** cars

Figure 24: Recent Faults List-LM
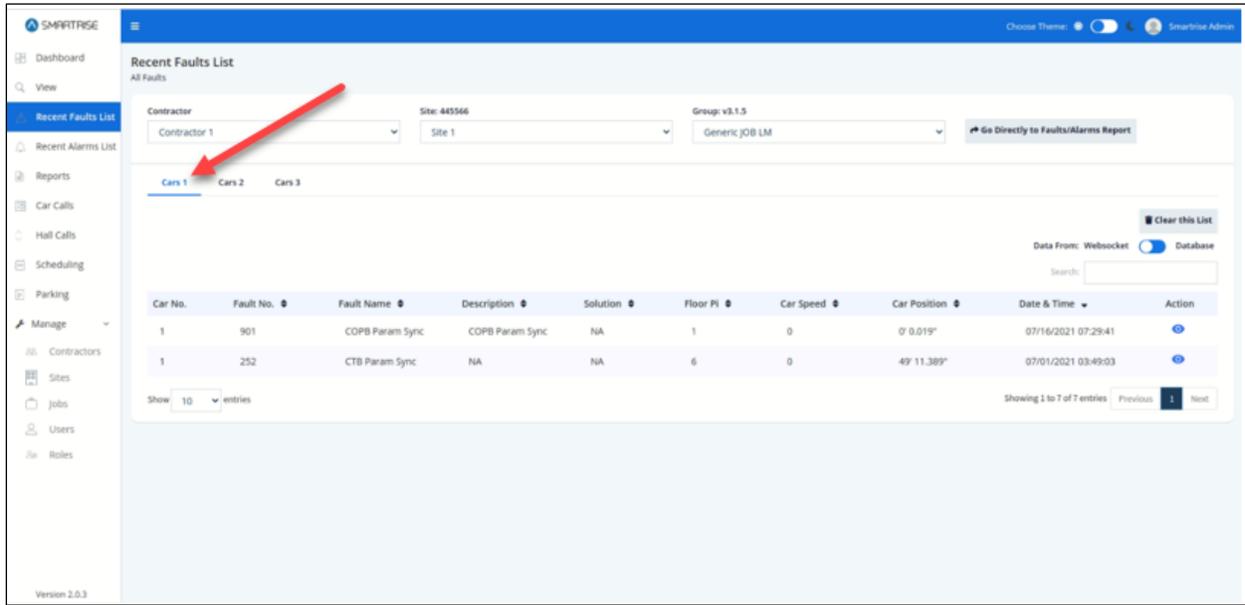
Figure 25: Recent Faults List-RM

8.1   Fault Details

To view fault details, click on the View button under the Actions column. A pop-up window displays providing a one-sentence description of the fault as well as a solution for resolving it. Click on Done or [X] to close the pop-up.

Figure 26: Fault and Traction Loss Pop-up

8.2   Fault Reports

From the Recent Faults List, click on the Go Directly to Faults/Alarms Reports to access all recent faults. The Report Type is set by default to Faults/ Alarms History, which lists both faults and alarms. For a description of all possible faults within the system, select Faults/Alarms Definition from the Report Type drop-down list and click View Report to view a list of all faults. Faults are sorted by Fault Number and Fault Name.
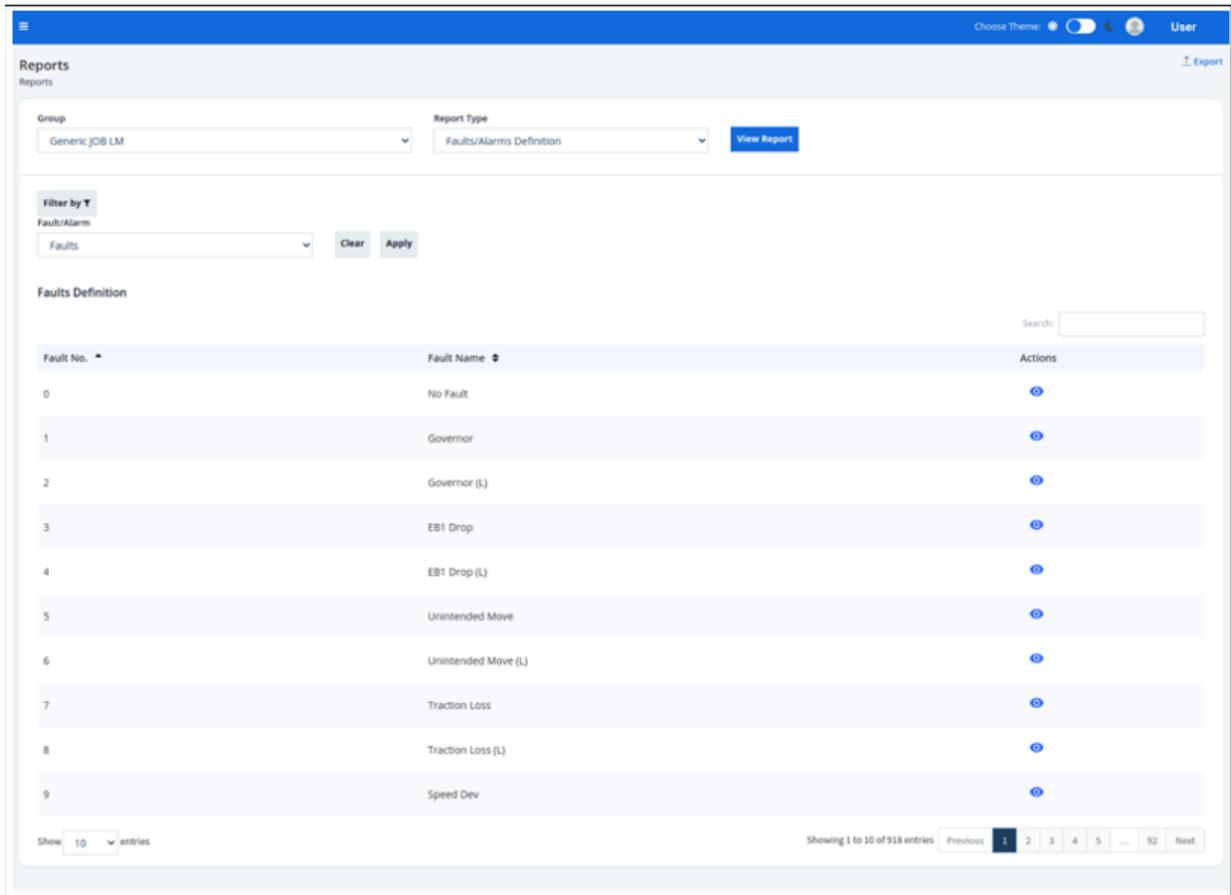
Figure 27: Reports – Faults Definition

To view Fault Details, click on the View button under the Actions column for that fault. A pop-up window displays providing a general fault summary. Click on Done or [X] to close the pop-up.
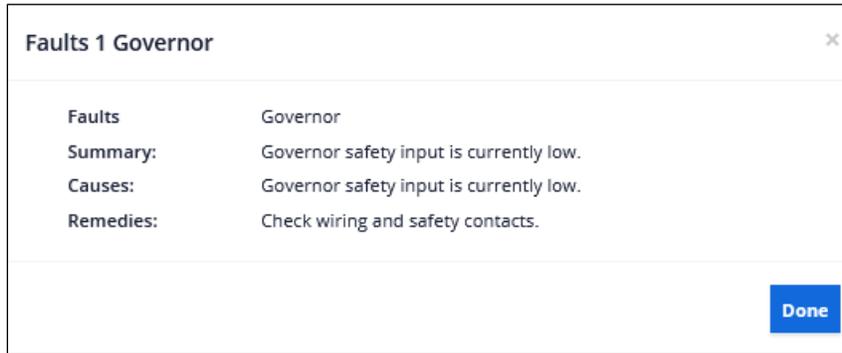
Figure 28: Reports – Fault Details Pop-up

A track record of all occurred faults are likewise recorded by the system. Select Faults/Alarms History from the Record Type drop-down list and filter by Type (= Faults), Date Range, and Cars. The report generated displays the faults that have occurred over a selected time-period for a designated car(s).
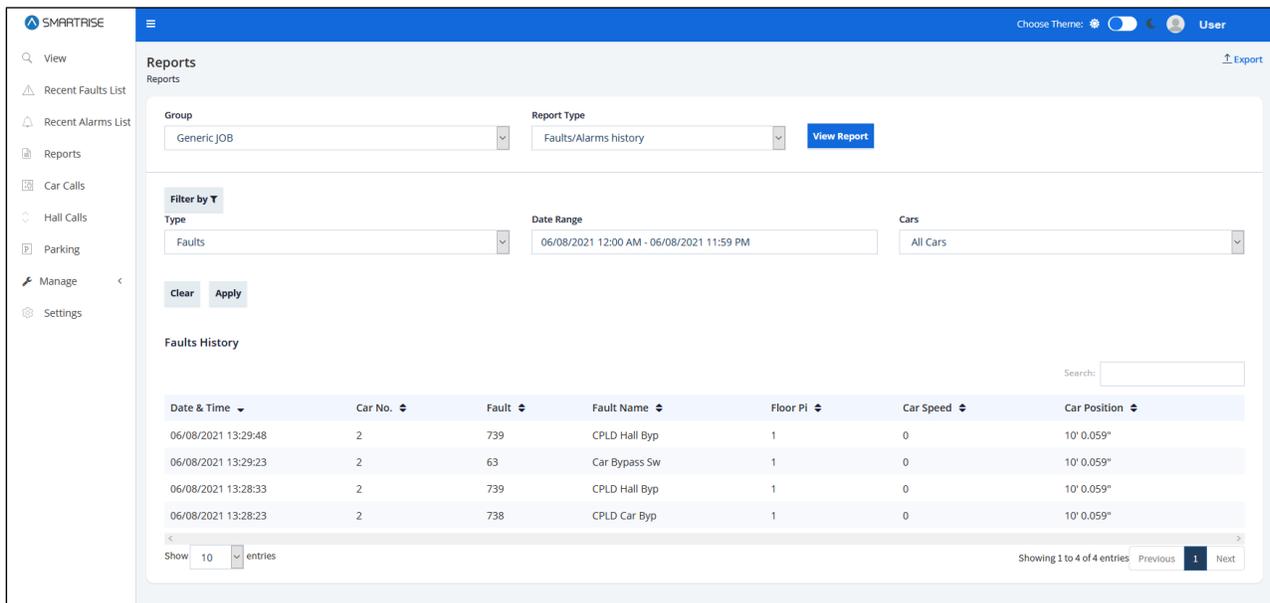
Figure 29: Report – Faults History

To export the report as a PDF, click the Export button on the Reports screen.

Figure 30: Faults Definition - Report

Figure 31: Faults History - Report

9   Recent Alarms

In the LM application, the Recent Alarms Module shows a list of alarms for a selected car, per group. In the RM application, the Recent Alarms Module shows a list of alarms for all monitored cars per group/ bank, per contactor, and per site. To view a list of alarms for a car, click on the Car Number tab.

Records can be filtered and searched by:

- Alarm Number
- Alarm Name
- Description
- Solution
- Date & Time

The table below lists the main components for Alarms.

Table 3: Main Components for Alarms

Components	Position	Function
Search Bar	Top-Right	Browse through the alarms of a selected car
Entries Drop-Down	Bottom-Left	Customize the listing display by adjusting the number of entries shown per page
Pagination Buttons	Bottom-Right	Seamlessly navigate through the listing
Clear All Alarms	Top of Search Bar	Delete all alarm records for all groups and all cars

Figure 32: Recent Alarms Module-LM
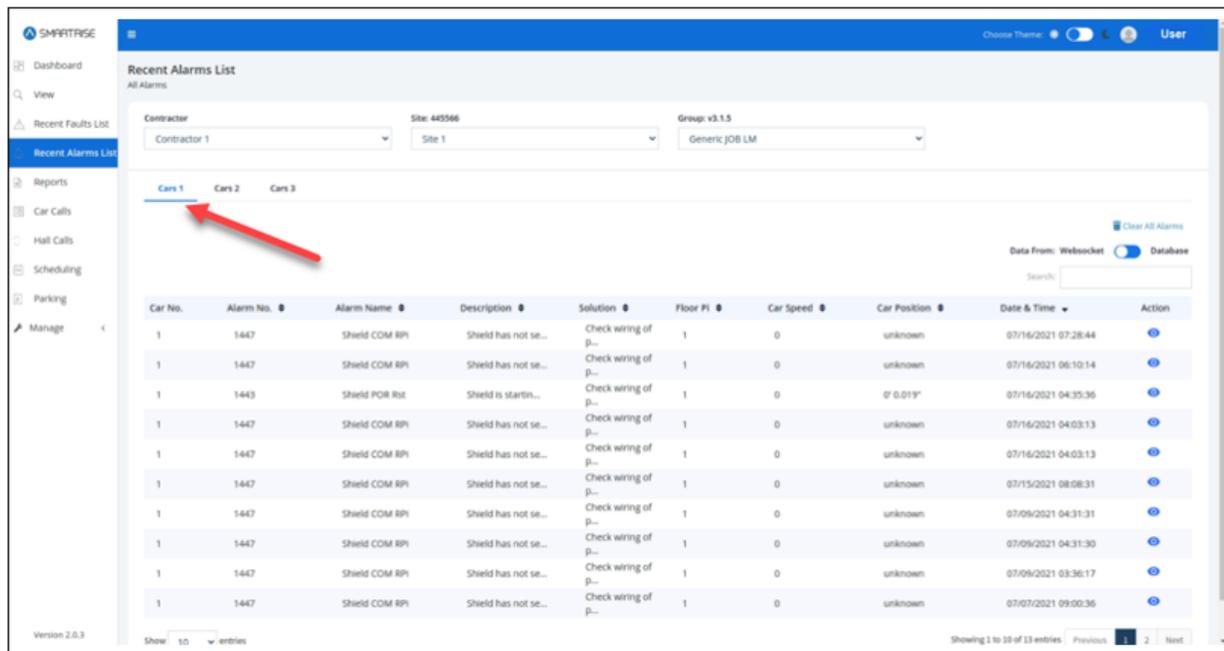
Figure 33: Recent Alarms Module-RM

9.1 Alarm Details

To view alarm details, click on the View button under the Actions column in the Recent Alarms Listing table. A pop-up window displays a one-sentence description of the alarm as well as a solution, if applicable, for a resolution. Click on Done or [X] to close the pop-up.
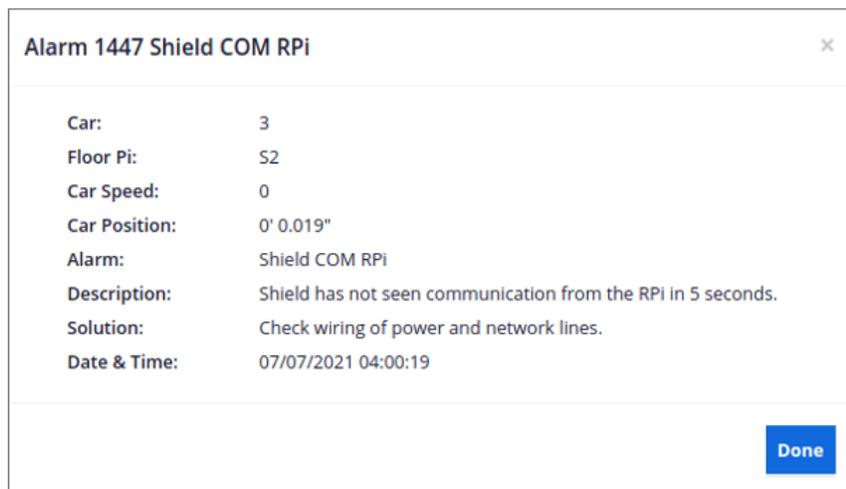
Figure 34: Alarm Details Pop-up

9.2   Alarm Reports

The Reports Module shows a description of all possible alarms within the system. To view the list of alarms, select Faults/Alarms Definition from the Report Type drop-down list. Then from the Filter by drop-down list select Alarms.
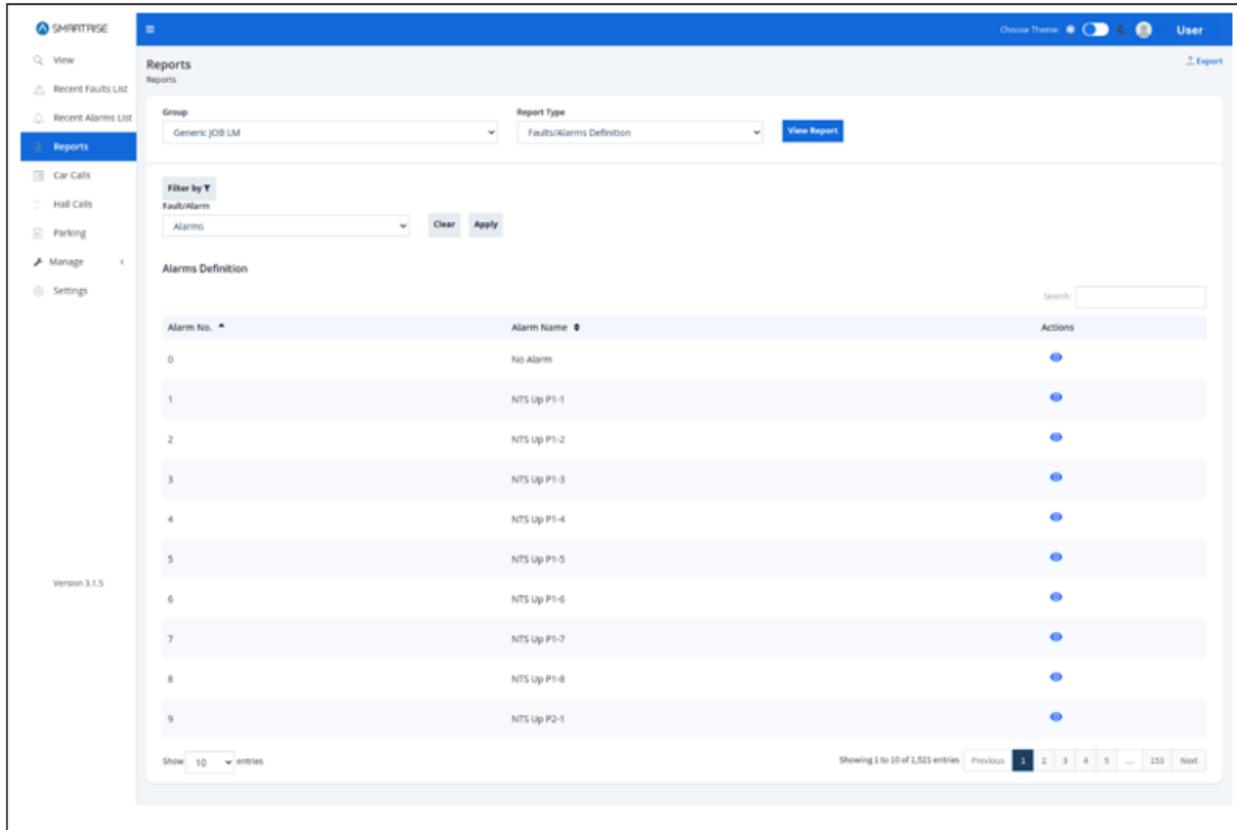
Figure 35: Reports – Alarm Definition

To view Alarm Details, click on the View button under the Actions column for that alarm. A pop-up window displays providing a general alarm summary. Click on Done or [X] to close the pop-up.
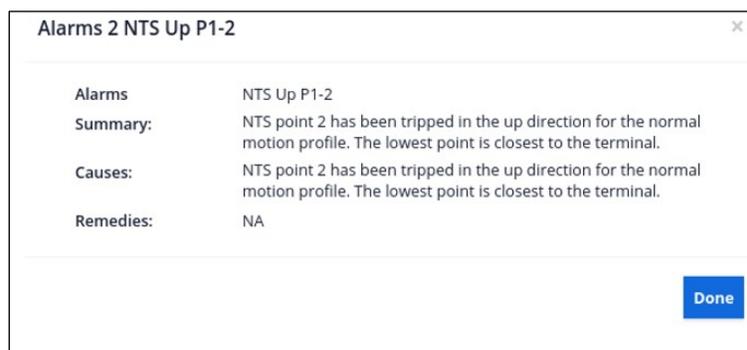
Figure 36: Reports – Alarm Details

A track record of all occurred alarms are likewise recorded by the system. Select Faults/Alarms History from the Record Type drop-down list and filter by Type (= Alarms), Date Range, and Cars. The report generated displays the alarms that have occurred over a selected time-period for a designated car(s).
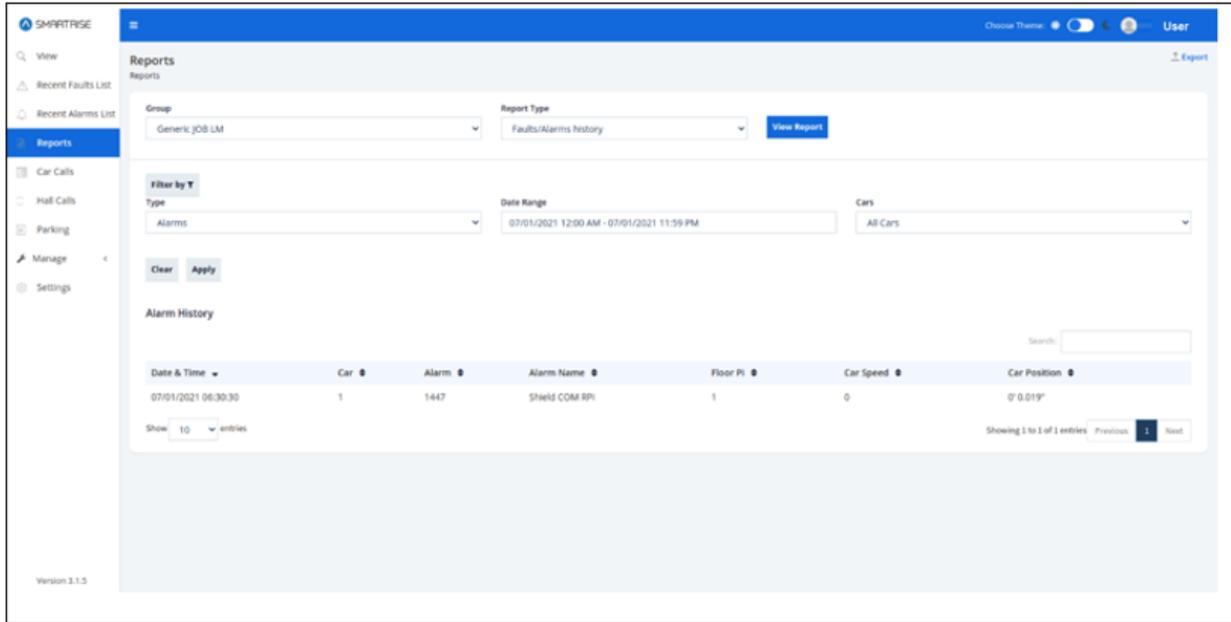
Figure 37: Reports – Alarm History

To export the report as a PDF, click the Export button on the Reports screen.
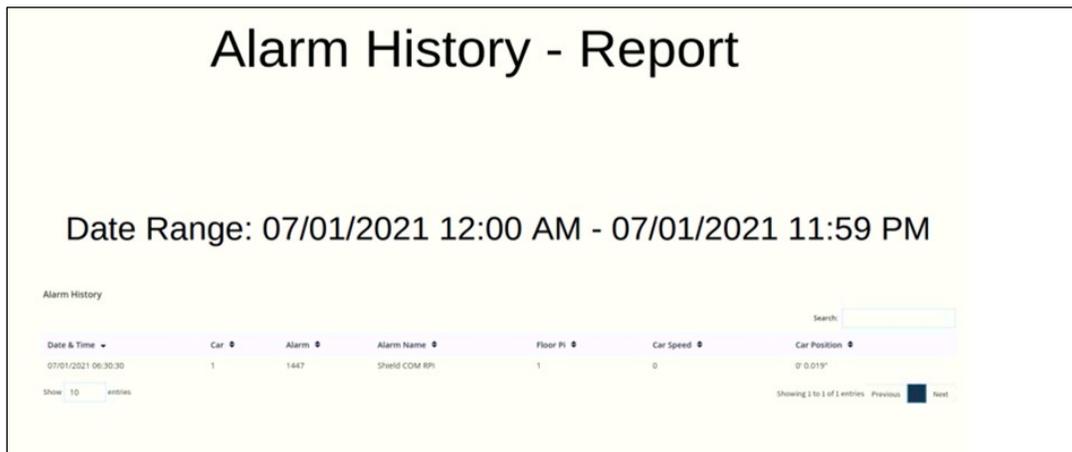
Figure 38: Alarm History - Report

10   Reports

The Reports Module allows for selecting a type of report to view.

The table below lists the reports that can be generated with their corresponding filters.

Table 4: Reports Generated

Report Name	Filter
Car Calls by Floor	Filtered by Date and Time range
Car Calls by Time of Day	Filtered by Date range
Car Use	Filtered by Date range and Cars
Door Times	Filtered by Date range and Floors
Faults/Alarms Definition	Filtered by Record Type
Faults/Alarms History	Filtered by Record Type, Date and Time range, and Cars. Records can be searched by the details available.
Floor to Floor Times	Filtered by Date range and Floors
Hall Calls by Floor	Filtered by Date and Time range
Hall Calls by Time of Day	Filtered by Date range
Out of Service List	Filtered by Date and Time range and Cars
In-Service Overview	Filtered by Date range
Program Events	Filtered by Date and Time range and Event Type
Wait Times – Average by Floor	Filtered by Date and Time range
Wait Times – Average by time of day	Filtered by Date range
Wait Times – Distribution by Wait Time	Filtered by Date and Time range
Wait Times – Distribution by Time of Day for Down Calls	Filtered by Date range
Wait times – Distribution by Time of day for Up Calls	Filtered by Date range
Wait Times – Longest (max)	Filtered by Date and Time range. Records can be searched and sorted by the details available.

11   Car Calls

The Car Calls Module provides a simulation of a car call, for all online cars.

11.1   Enter Car Calls

Only the floors that are shown without a lock are available for car calls. In the LM application, to make a car call, click on an online car from the Car Number tab > Enter Car Calls > Select Floor Number. Once selected, the button color changes to a solid blue.
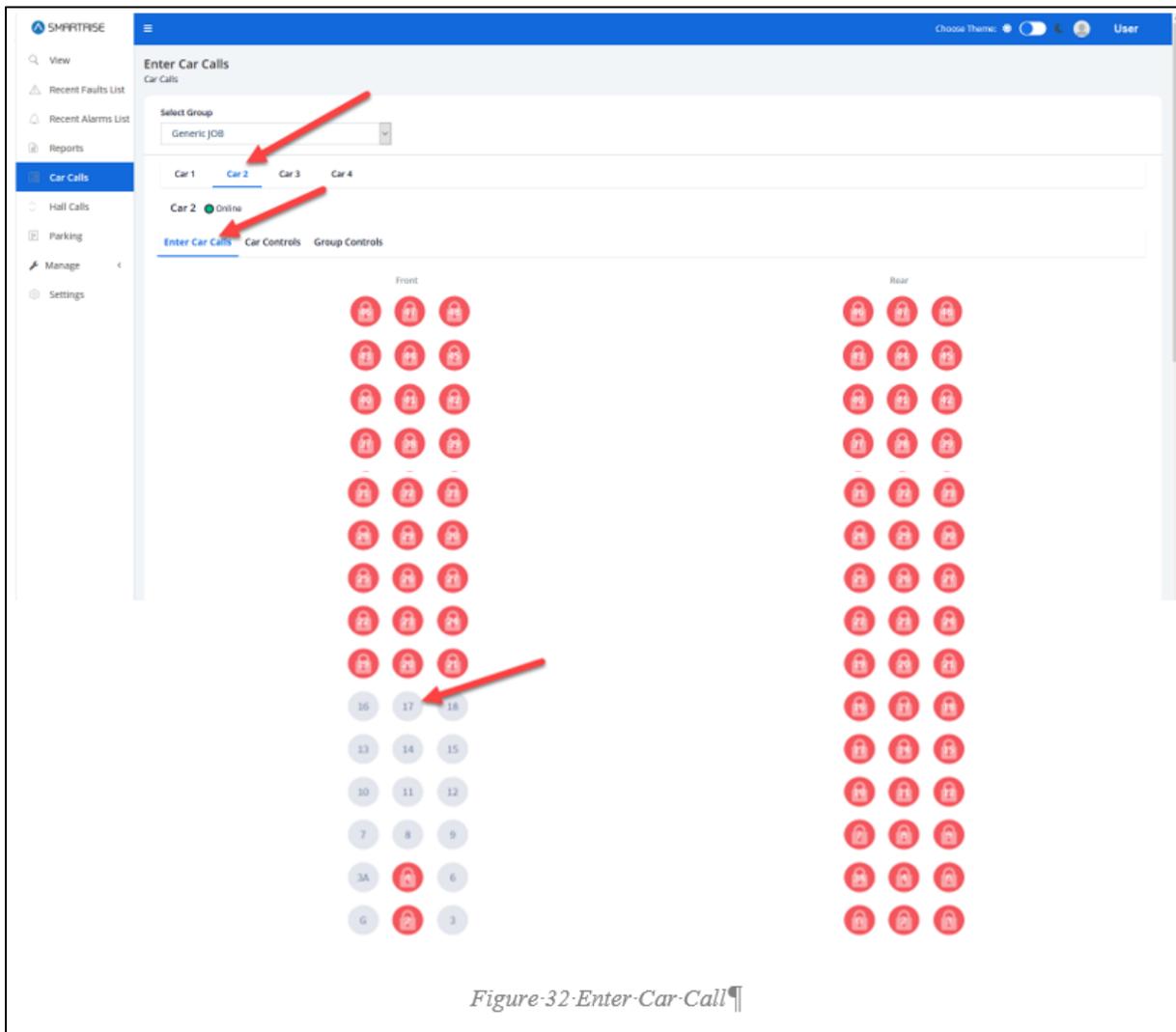
Figure 39: Enter Car Calls-LM
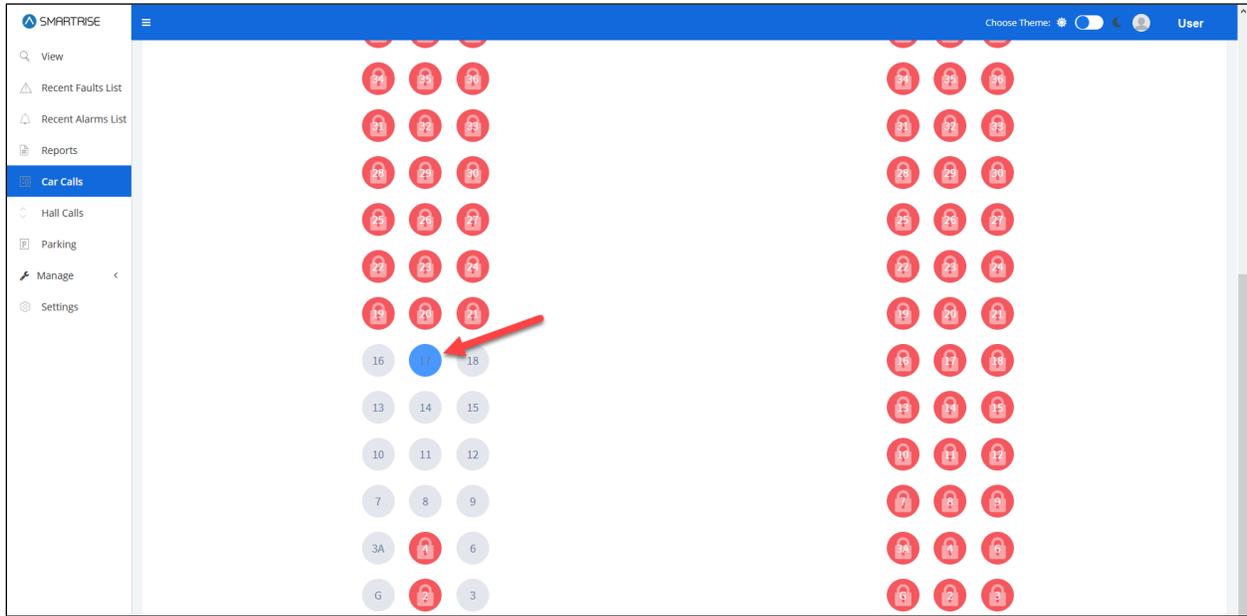
Figure 40: Enter Car Call – Floor Selected-LM

In the RM application, to configure a car call, select the Contractor, Site, and Group from the drop-down lists. Then, choose a car name from the Car tab > Enter Car Calls > Select Floor Number.
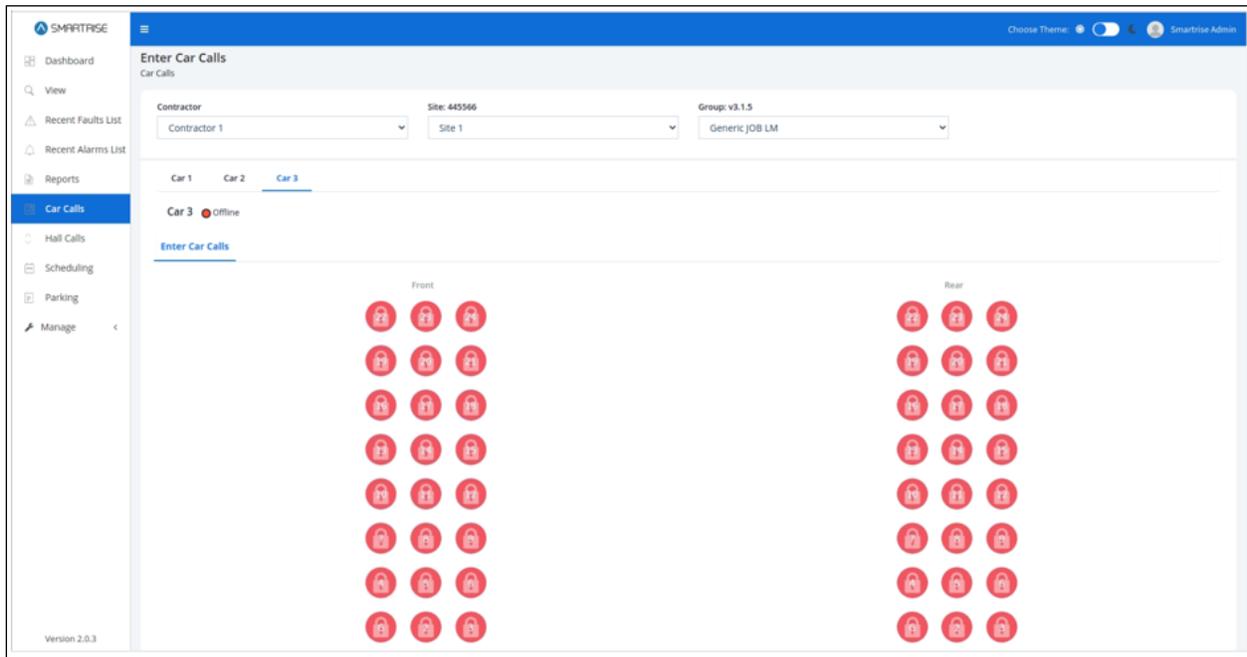
Figure 41: Enter Car Call-RM

11.2   Car Controls

Car Controls consists of two sections.

- Section 1 – Displays the Car Label, Status (color-coded), Current Floor, Car Speed, and Door State. The Door State can be shown as either open or closed.
- Section 2 – Includes a set of car controls lined with the Turn On switch. To enable or disable a service, click on the Turn On button next to it. If the "Independent Service" control is enabled, the Door State shows as closed.

To turn on or off a service, click on the button next to the service.
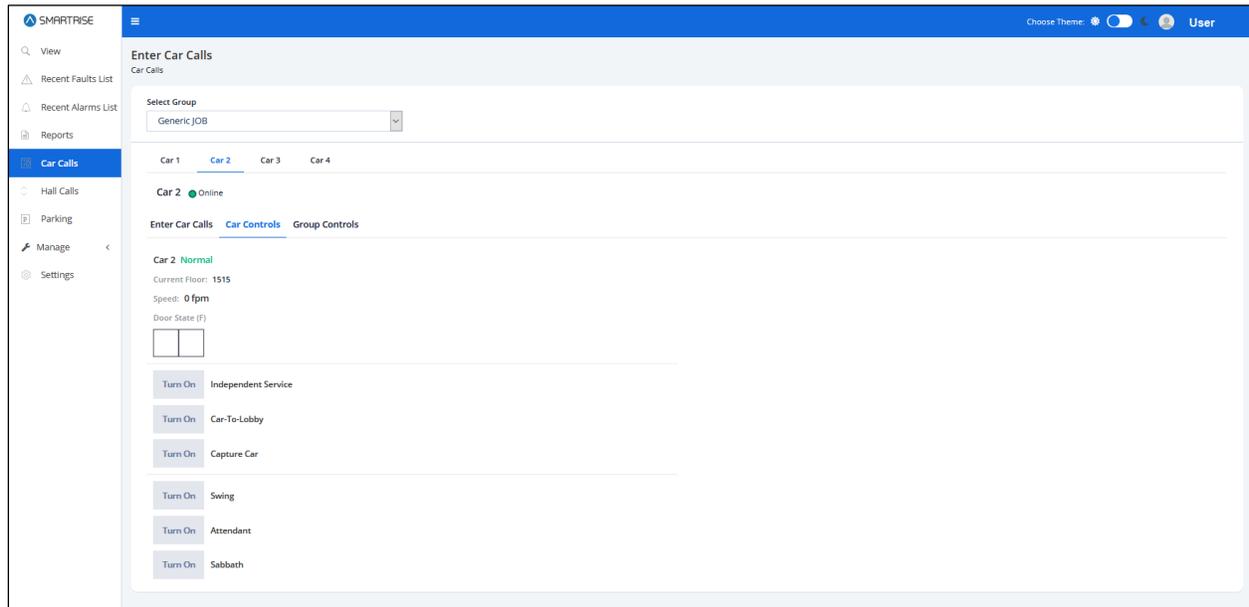
Figure 42: Car Control-LM

Only one type of control can be turned On or Off. The rest of the controls are not available to be selected.
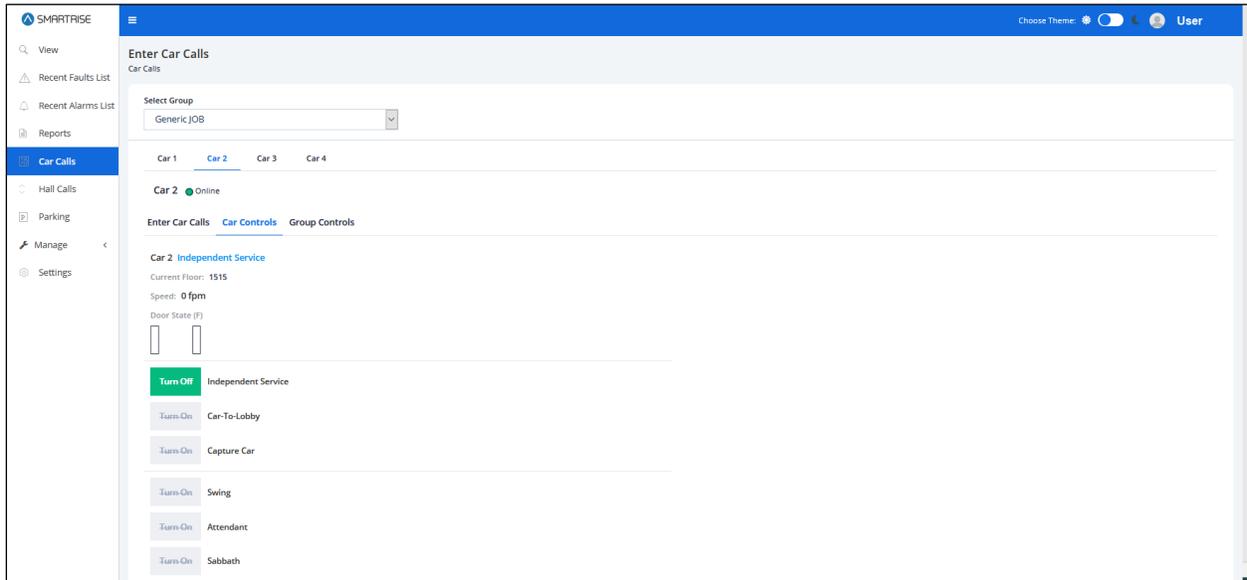
Figure 43: Car Control – Service is Off-LM

11.3 Group Controls

Group Control displays the type of group for the car. If all types of car controls are off, the Group Controls show as Normal.

Figure 44: Group Control – Normal-LM

If, for example, Independent Service is turned on, the Group Control displays Independent Service in blue.

Figure 45: Group Control – Independent Service-LM

Group Controls displays the type of group for the car. If all types of car controls are off, the Group Controls show as Normal.

12   Hall Calls

The Hall Calls Module allows for simulating a hall call.

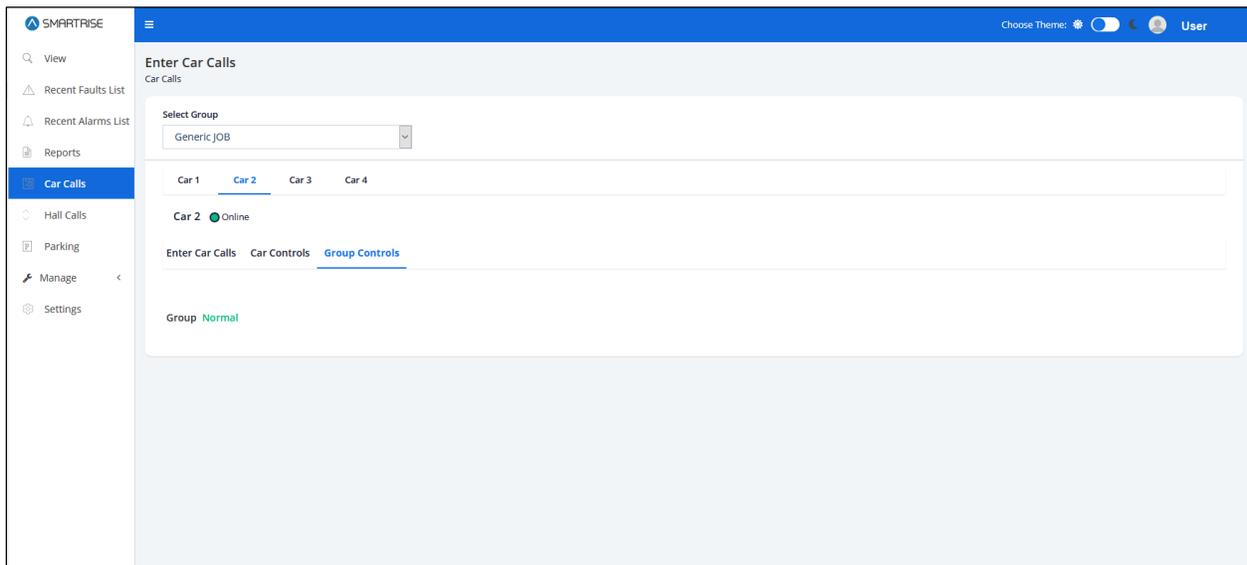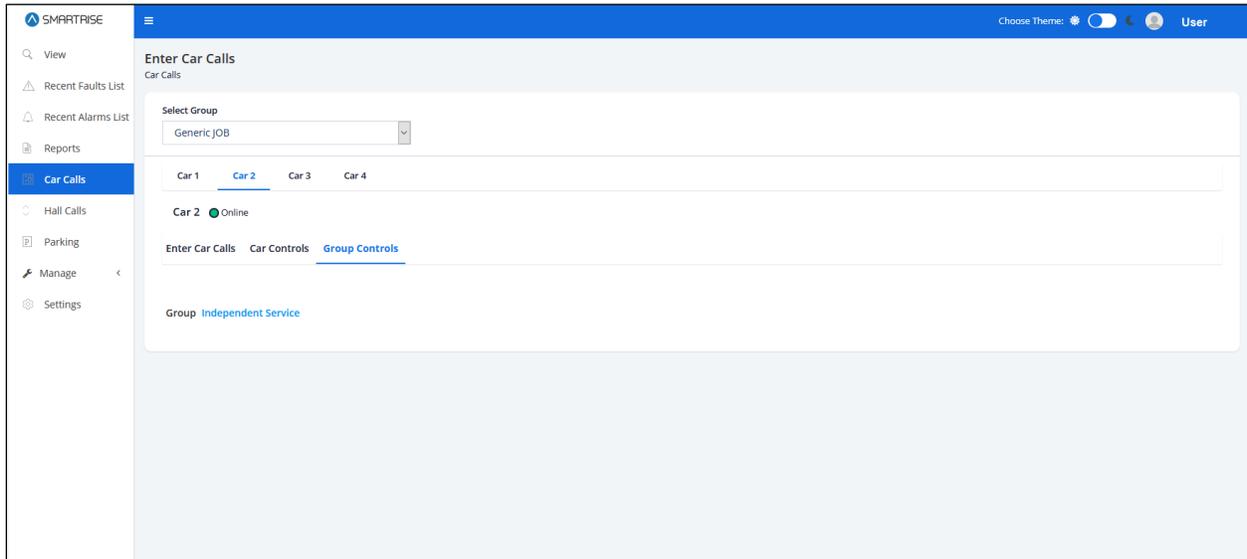In the LM application, select the Group from the drop-down list. In the RM application, select the Contractor, Site, and Group from the drop-down lists. Hall calls can be made by clicking on the button that refers to a floor and direction. When the button is clicked, the controller logs the hall call in the designated direction. If there are existing hall calls in the system, the corresponding button that refers to a floor and direction is activated. Buttons are separated in two sections, Front and Rear. If there is no Rear door for the car, only the Front section is displayed.
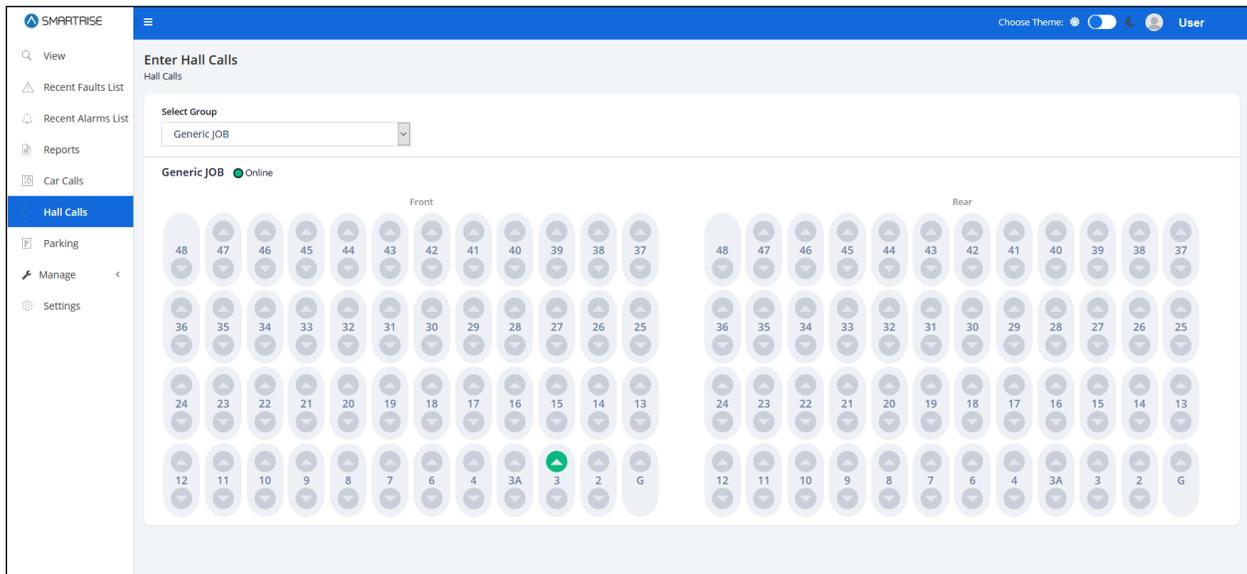

Figure 46: Enter Hall Calls-LM
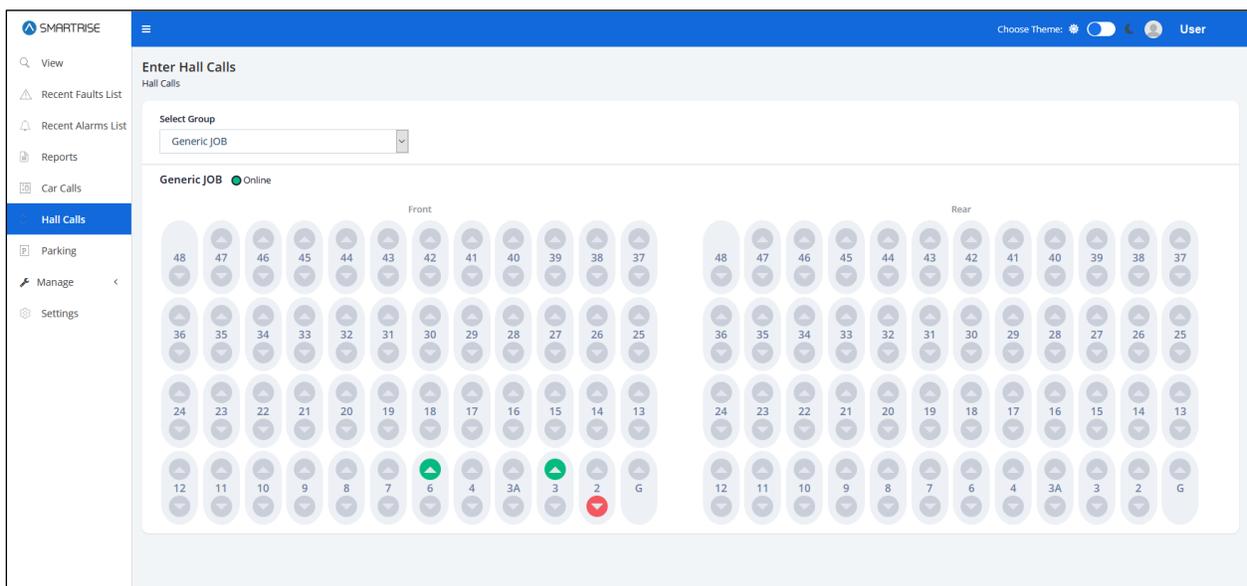
Figure 47: Enter Hall Calls – Multiple Calls-LM
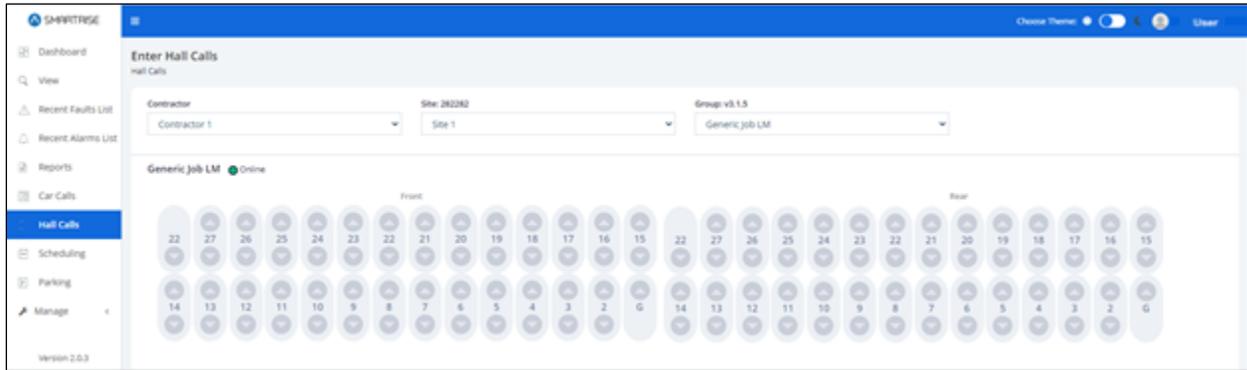
Figure 48: Enter Hall Calls-RM

13   Parking

The Parking Module allows for selecting parking options. Parking is the process of moving an idle car to a designated floor. Its aim is to reduce the amount of time it takes to service busy floors. For example, if a car has completed all of its requests, it will return to the "parking" floor and remain there until another request is made. See the *C4 GUI Manual* for more information.

Figure 49: Parking-LM

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14 Manage-LM

In the LM application, the Manage Module allows administrators to coordinate users, roles, and devices in the system. This section lists details for each submodule.

14.1 Users

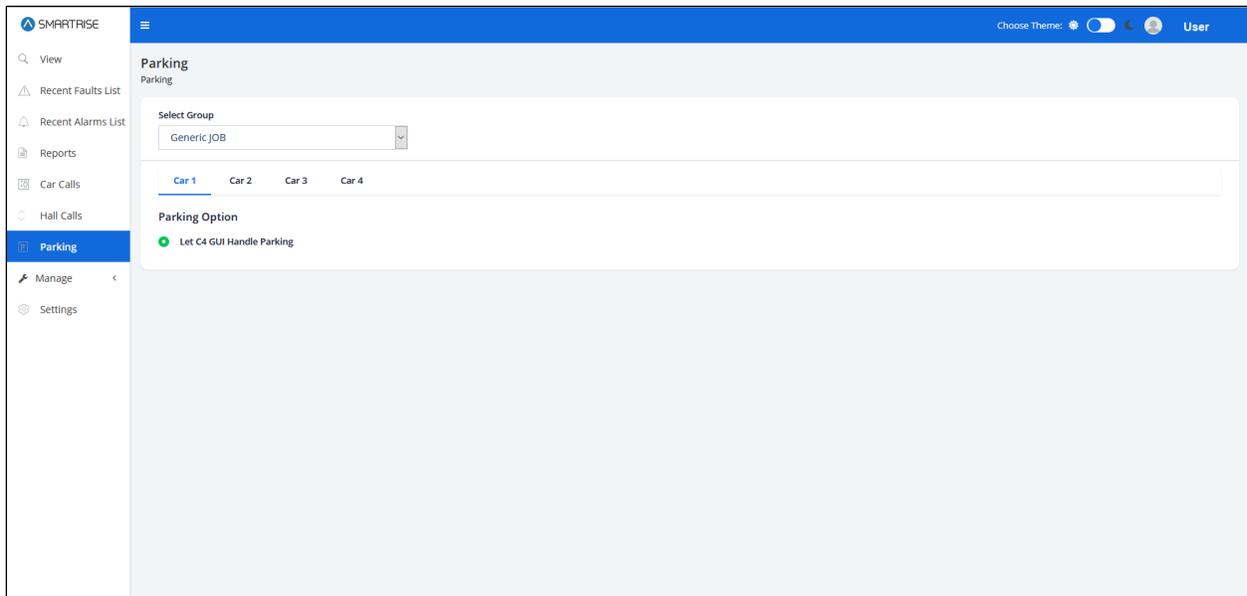Each user is enrolled into the system and assigned a role. Users are logged into the system to execute granted tasks within the role that has been assigned to them. Users can be sorted by clicking on the Filter by button. Columns can be filtered by selecting either a type of Role and/or Status from the drop-down list.
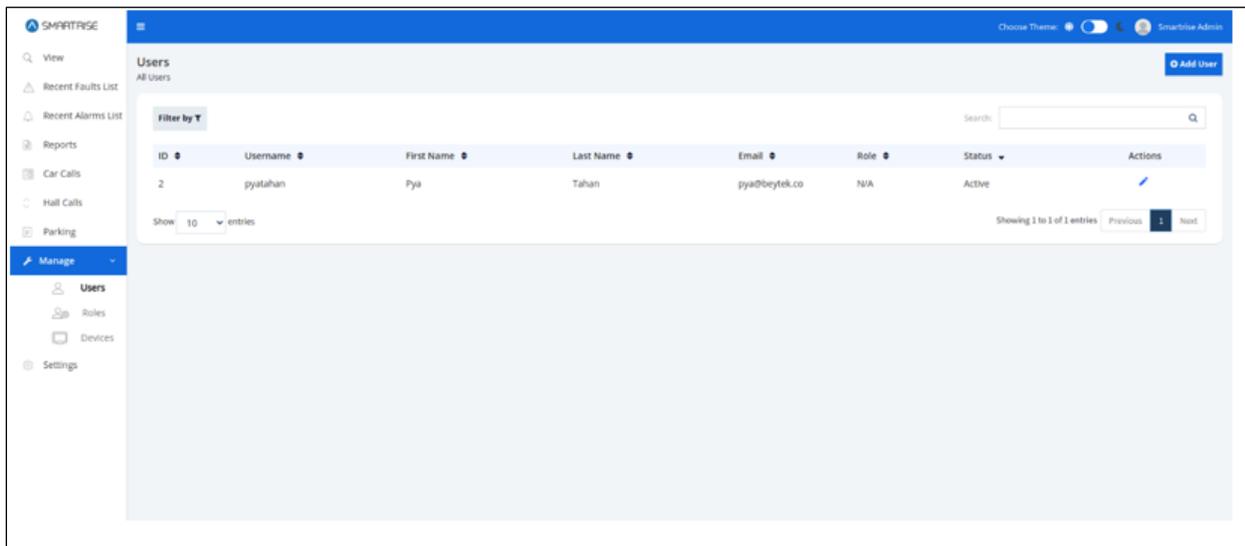

Figure 50: Manage Users-LM

14.1.1   Add User

To add a new user click on Users. The Add User screen is displayed, prompting for the new user's basic information.

- First Name
- Last Name
- Email Address
- Contact Number
- Status – Whether Active or Inactive (checkmark corresponds to Active)
- Username
- Password – Has to meet uppercase, number, special characters, and length criteria
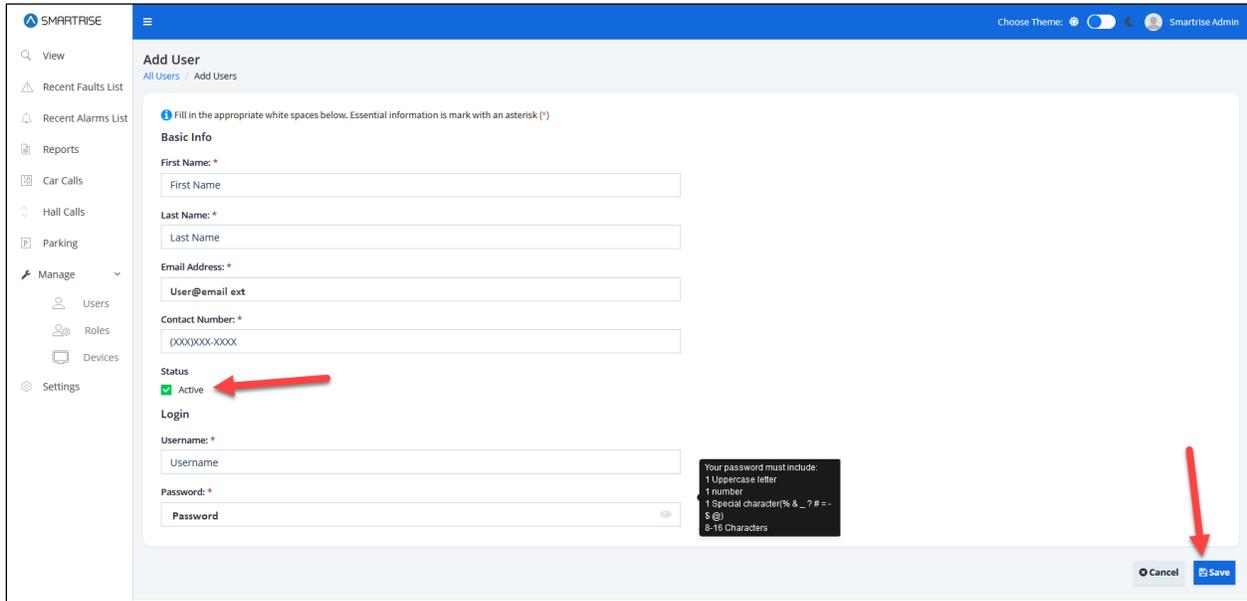
Figure 51: Add User-LM

When completed, click on the Save button. Upon successful submission, A pop-up displays informing the Administrator that the new user has been created successfully.
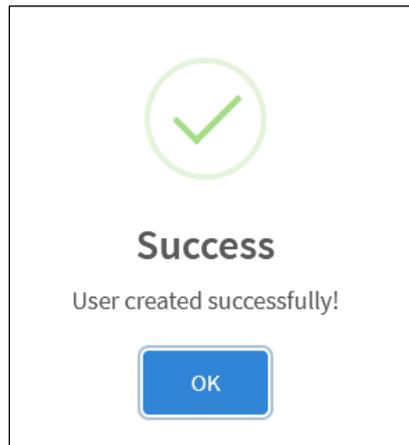

Figure 52: Users created successfully! Pop-Up

Click OK, the Edit User screen is displayed and consists of two sections.

- Section 1 – Represents an identity card of the newly added user and the information submitted in the Add User screen.
- Section 2 – Consists of a drop-down list including the different role options.

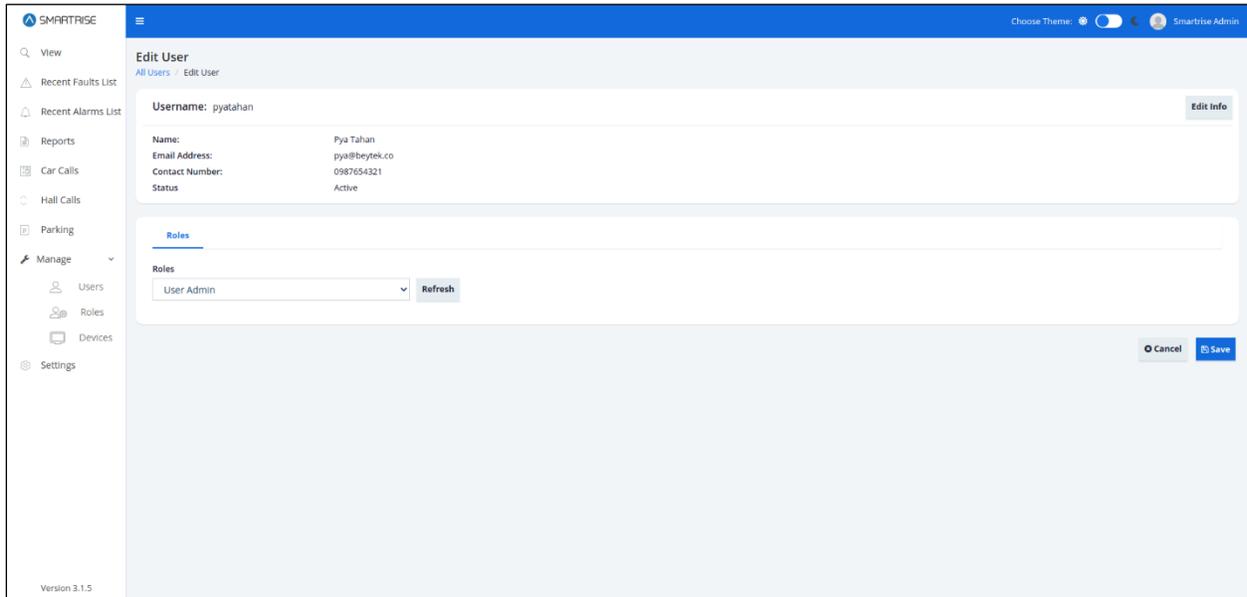Each user must be assigned a role. Select the role of the user by clicking on the Roles drop-down list.

Figure 53: Edit User – Landing Page-LM

When completed, click on the Save button. A pop-up displays informing that the User role has been updated successfully.
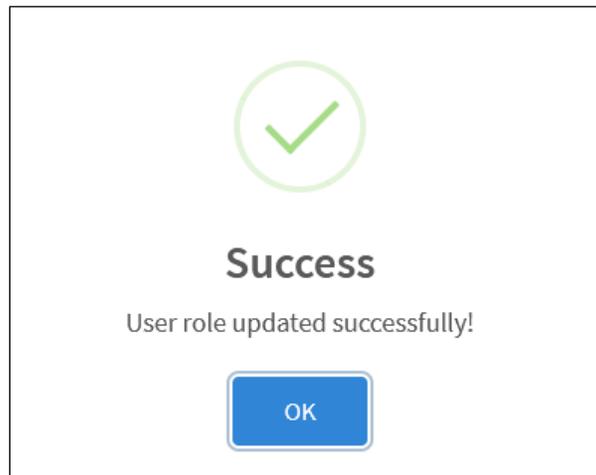

Figure 54: User role updated successfully! Pop-Up

The user has now been added to the Users Listing.

14.1.2   Edit User

There are two ways to Edit a user's information.

- When the user is being added to the system (via the Edit Info button)
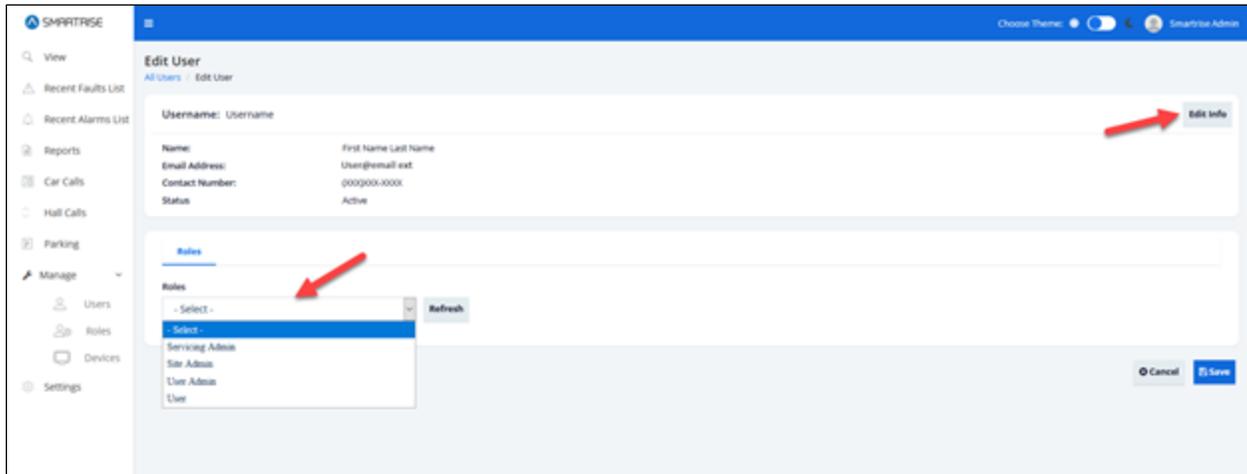- From the Users Listing (via the Edit button under Actions)

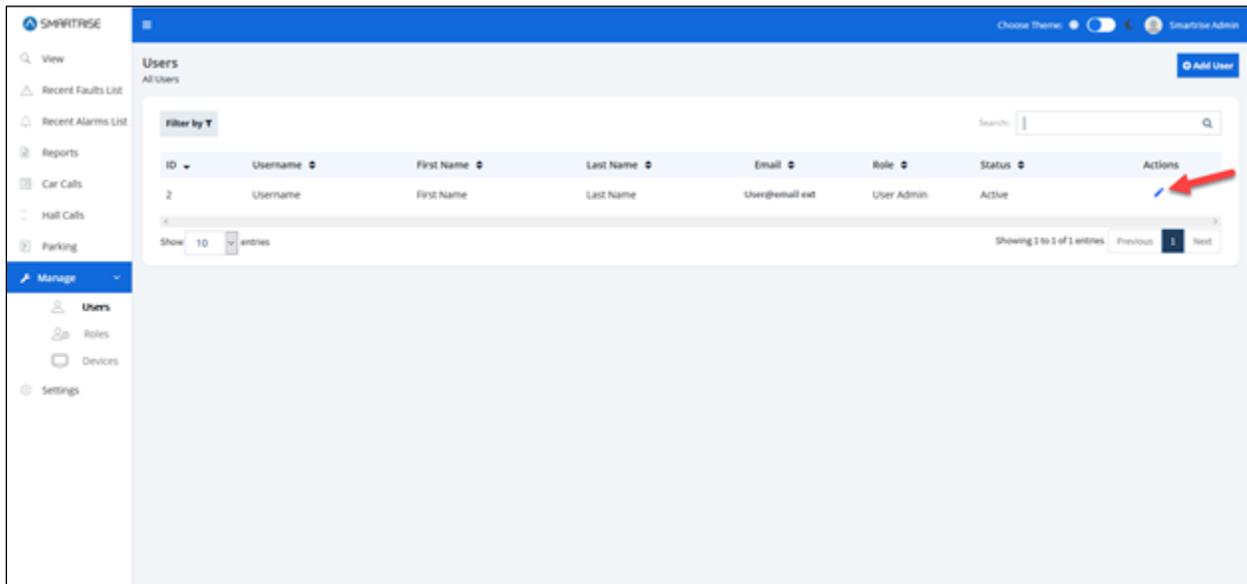*Figure 55: Edit User Method 1 – Edit Info Button*

Figure 56: Edit User Method 2 – Edit Under Actions

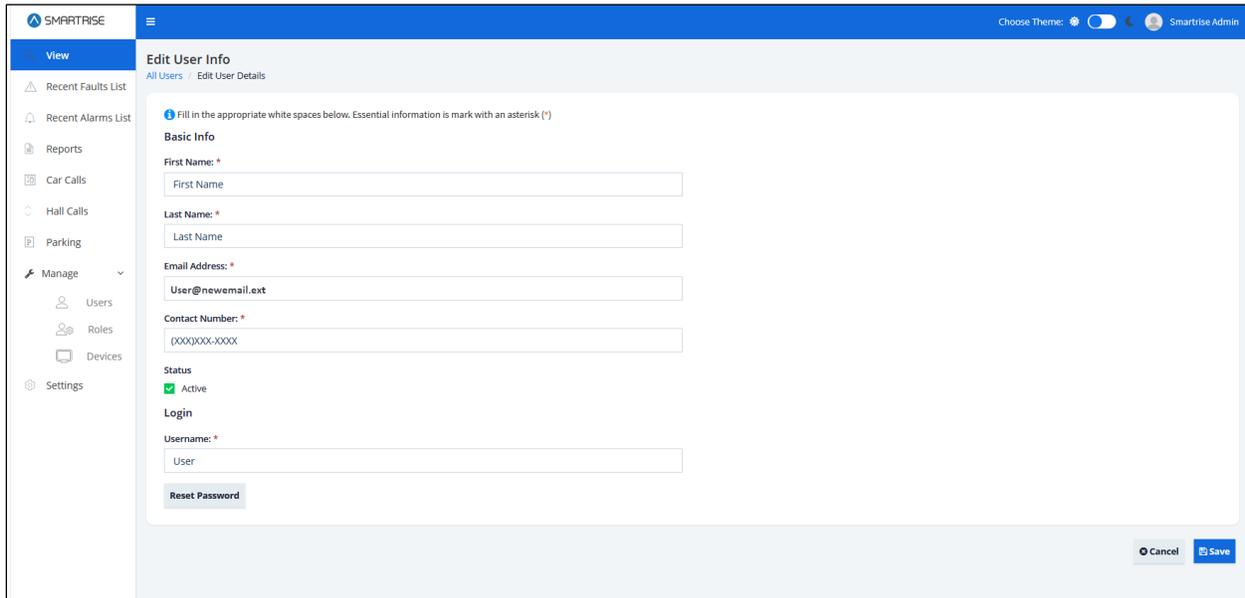When clicked, the user is redirected to the Edit User Info screen.

Figure 57: Edit User Info -LM

When completed, click on the Save button. A pop-up displays informing that the user information has been updated successfully.
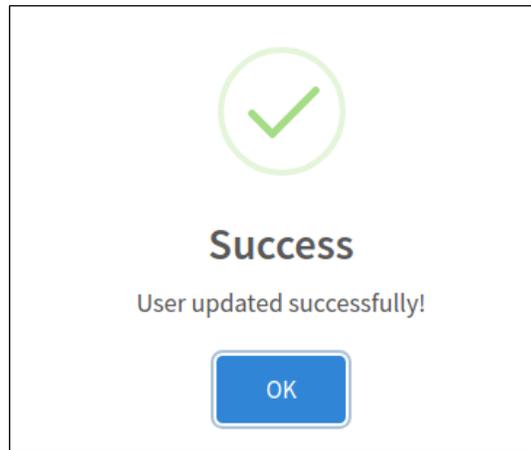

Figure 58: User updated successfully! Pop-Up

14.2 Roles

The role defines the user's permissions within the system. It is the authorization given to users that enables them to access specific resources. User permissions also designate the type of access; for example, read-only only allows for data to be viewed, read-write allows for data to be viewed and updated. Roles are assigned to grant users access to the functions required to execute a task. The predefined roles that can be assigned are as follows:
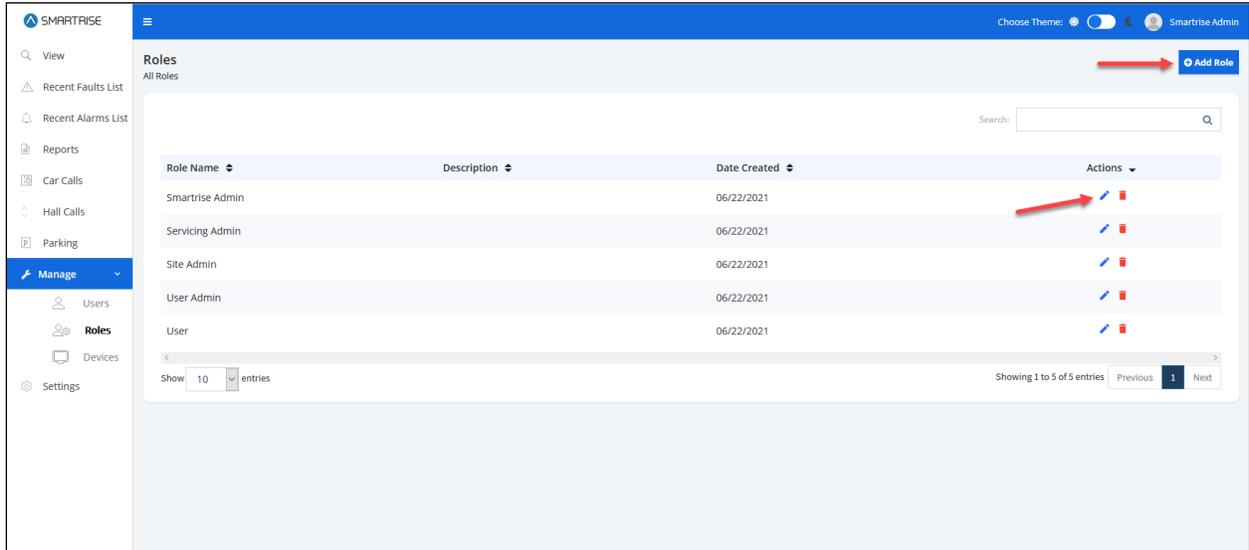
- Smartrise Admin
- Servicing Admin

- User Admin
- User

Figure 59: Manage Roles -LM

14.2.1   Add Role

To add a new role, click on the Add Role button from the Manage Roles screen. The Add Role screen is displayed, prompting for new role's basic information.

- Role Name
- Description – While optional, a short description of the role can be useful in conveying an idea of what the role entails.

After the role name and description has been entered, click on Permissions collapsible label to expand a wide collection of permissions to select from. For example, if the **View** check box is selected, all its subtasks are automatically selected.
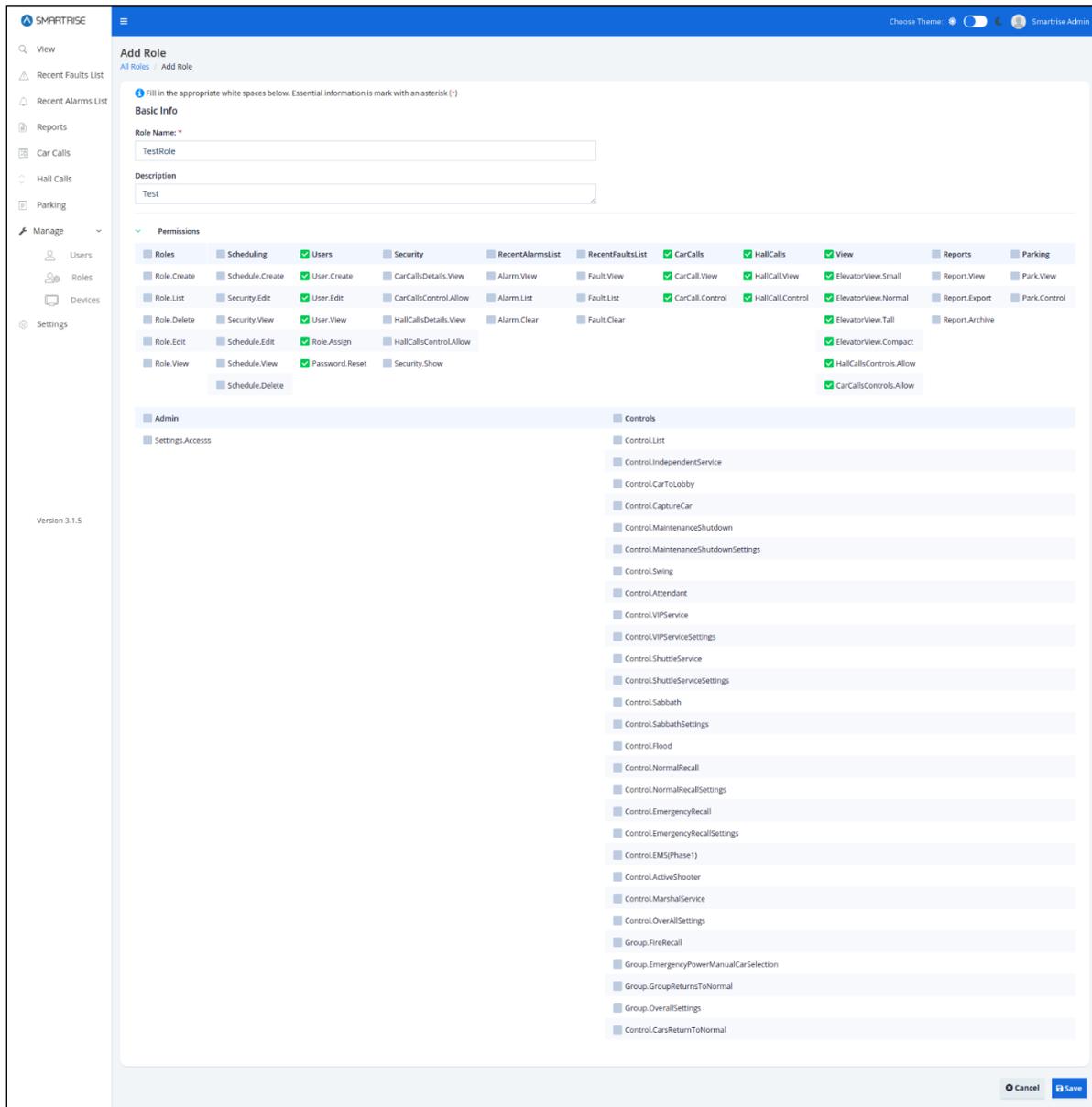

Figure 60: Add Role-LM

When completed, click on the Save button. A pop-up displays informing that the new role has been created successfully. Click on OK to proceed.
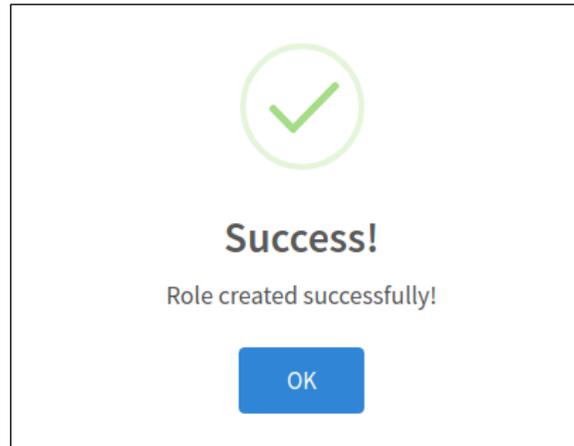

Figure 61: Role created successfully! Pop-Up

14.2.2 Edit Role

An existing role can be edited to modify permissions or change the role description. To Edit a Role, click on the Edit Role button under the Action column for that role and make the necessary changes. For example, TestRole Permissions are being modified - the View permissions are removed, and the Scheduling permissions are added.
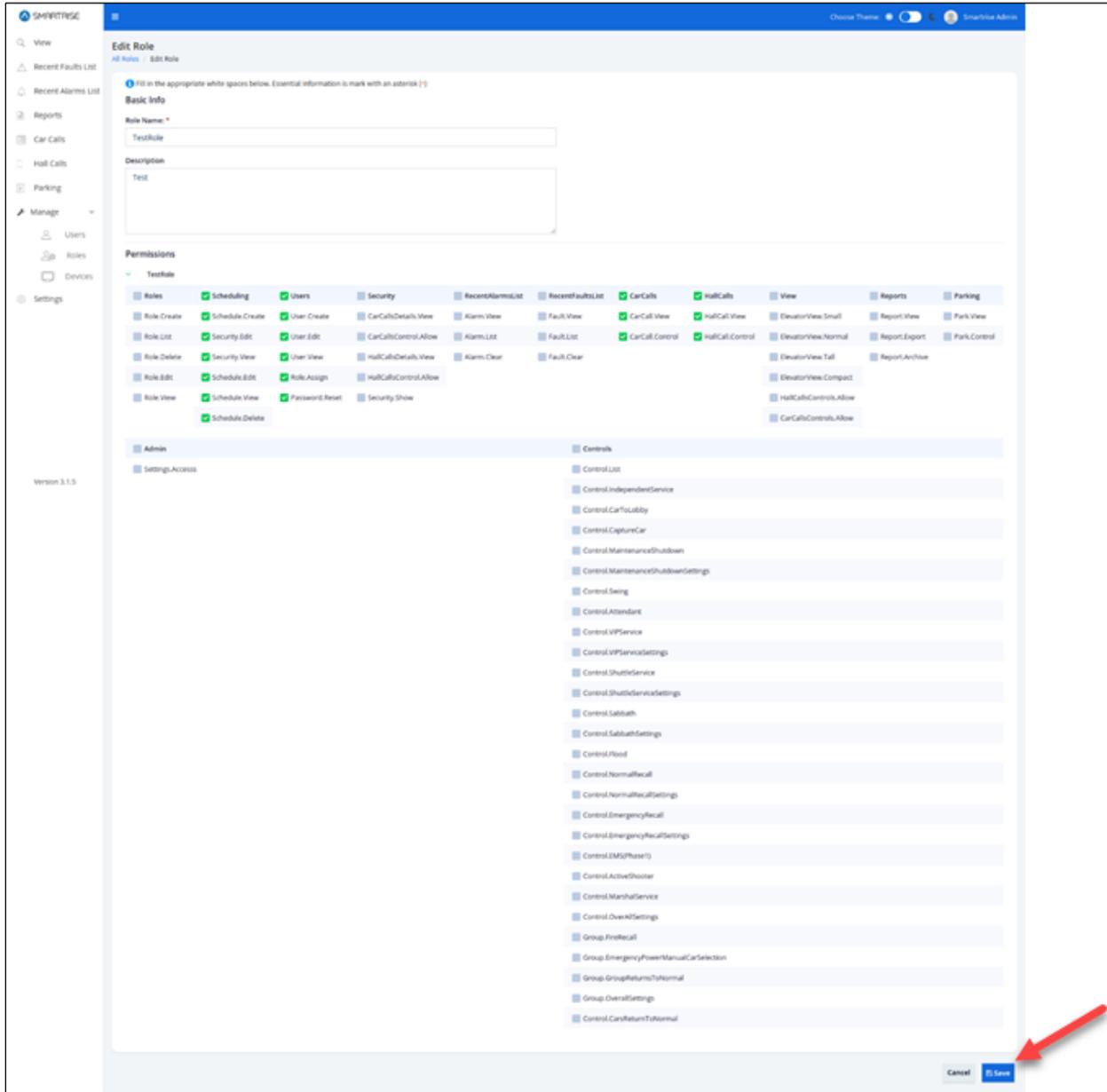

Figure 62: Edit Role-LM

When completed, click on the Save button. A pop-up displays informing that the role has been updated successfully. Click on OK to proceed.
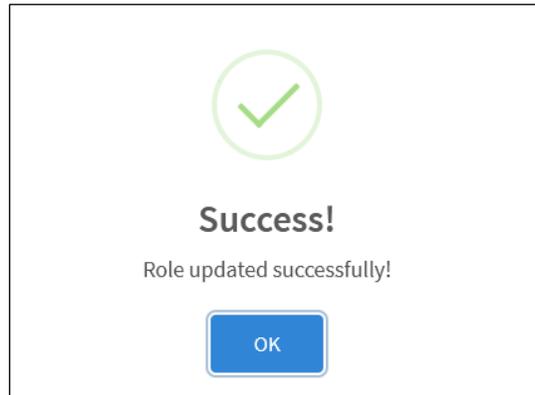

Figure 63: Role updated successfully! Pop-Up

14.2.3 Delete Role

An existing role can be deleted by clicking on the Delete Role button under the Actions column for that role. A pop-up displays prompting confirmation from the Administrator.
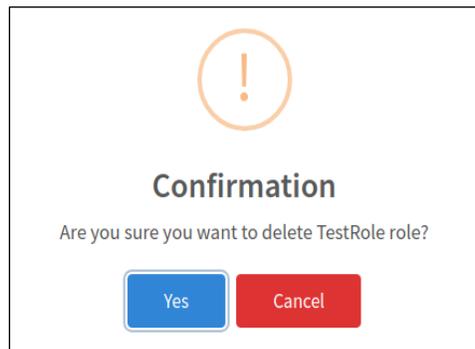

Figure 64: Confirmation Pop-Up

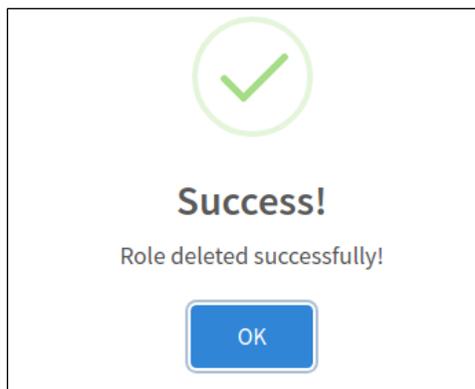Upon confirmation, a success pop-up displays informing that the role has been successfully deleted.

Figure 65: Role deleted successfully! Pop-Up

 September 8, 2021

14.3   Devices

Devices display all available viewing devices that can be accessed by the Local Monitoring System. Devices are sorted and searched by:

- Viewing Device Name
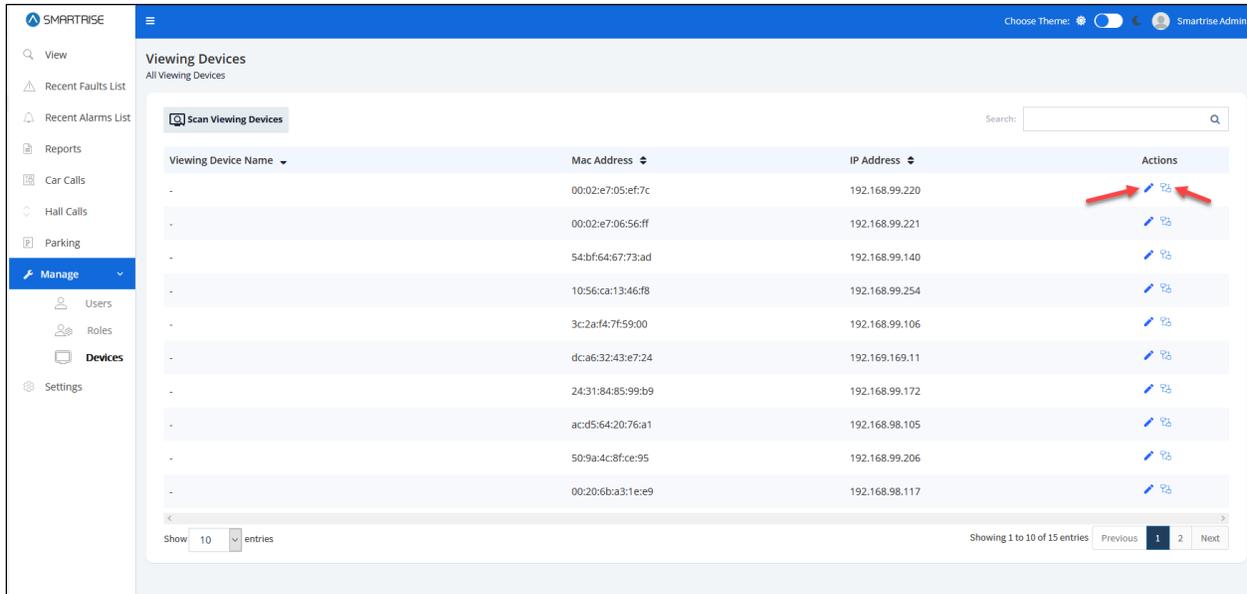- Mac Address
- IP Address

Figure 66: Manage Devices-LM

14.3.1   Edit Device

For each address, a device name is assigned. Click on Edit Device under the Action column to edit a device. The Edit Viewing Devices screen is displayed and includes the following components:

- Viewing Device Name
- Mac Address
- IP Address
- Elevator View – Contains a drop-down list of options for the elevator view format, and a checklist of visible elevator views to choose from
- Bank – Contains a list of banks the user must choose from. (A bank is used when multiple groups fall under the same job.)
- User Login – Contains a drop-down list of options for the user login requirement
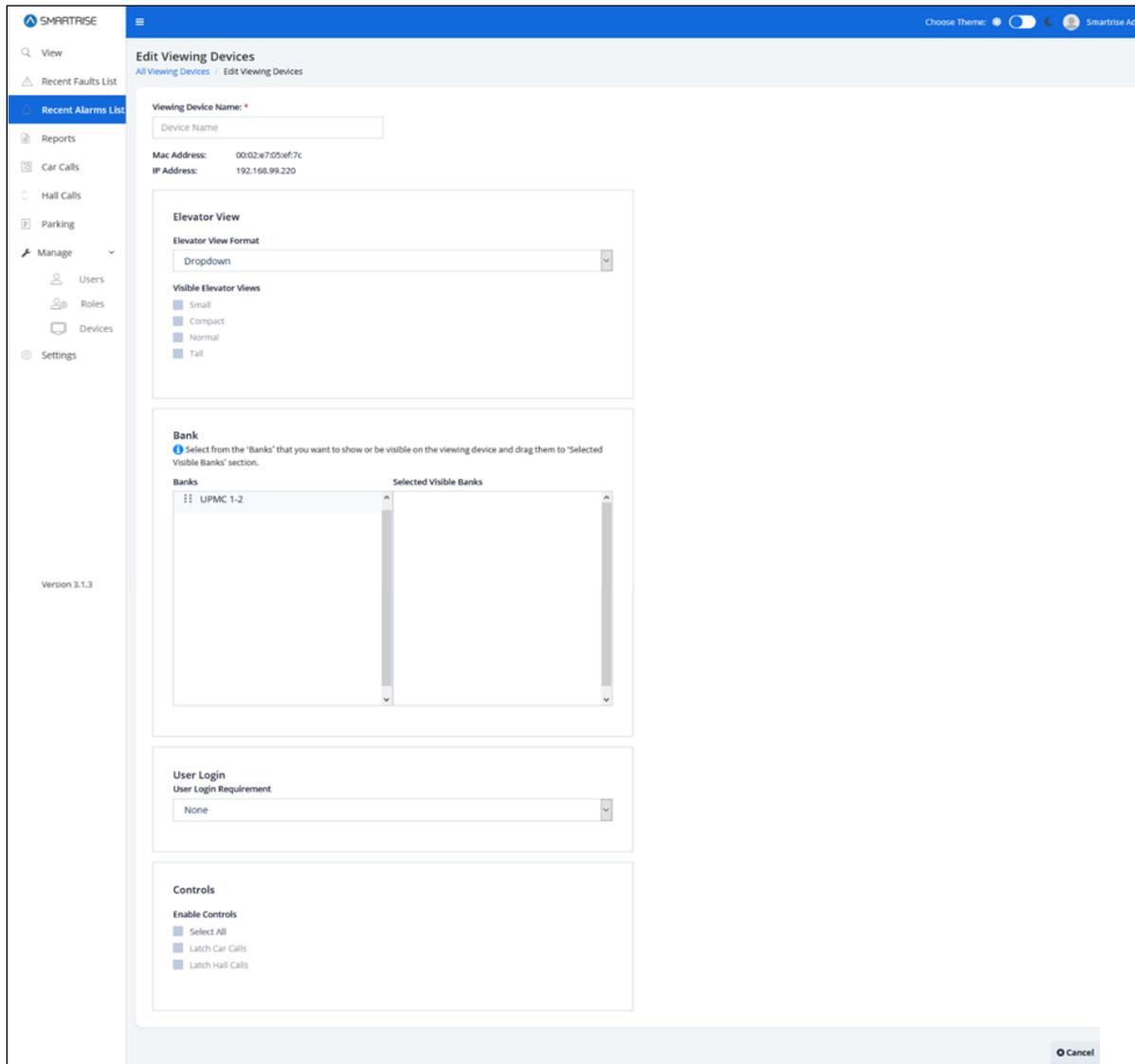- Controls – Allows the user select to latch a car call, hall call, or both.

Figure 67: Edit Viewing Devices-LM

When completed updating the viewing devices, click on the Save button. If a mandatory field has not been filled out correctly, a Warning pop-up is displayed.
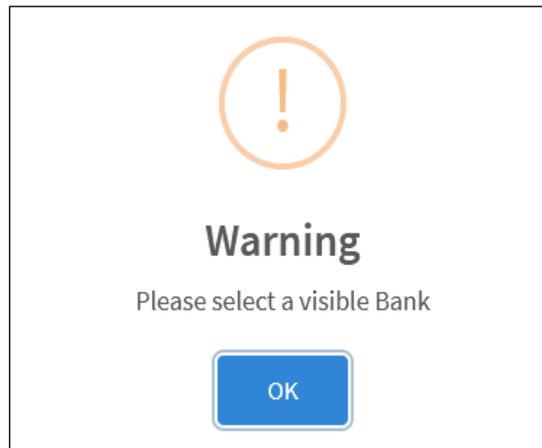

Figure 68: Warning Pop-Up

Upon successful submission, a pop-up displays informing that the device has been updated successfully. Click on OK to proceed.
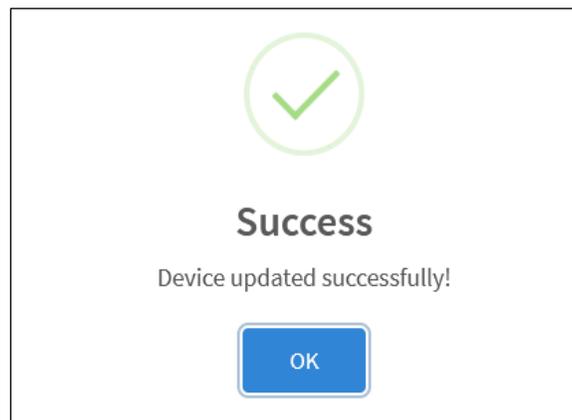

Figure 69: Device updated successfully! Pop-Up

14.3.2 Ping the Network

To verify whether a user can connect to the network, the user can either ping the Mac or IP address. Click the Ping Device button under the Action column. If the user can access the network, a success pop-up is displayed.
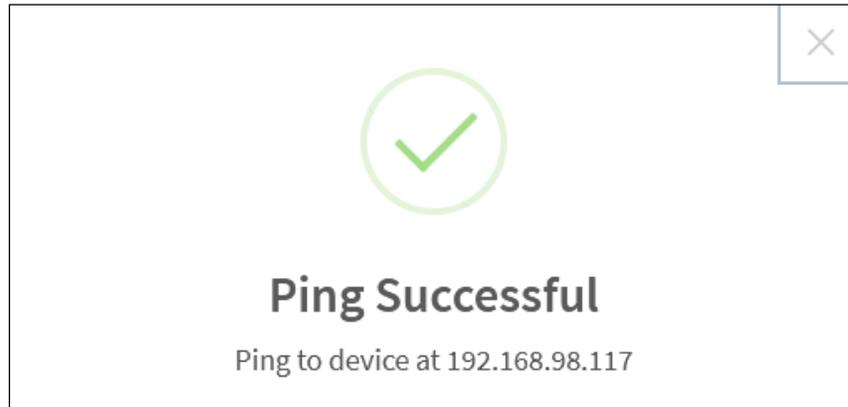
Figure 70: Ping Successful Pop-Up

15 Settings-LM

The settings Module allows the user to configure the settings for each DAD unit.

15.1 Group Configuration

The Group Configuration settings allows for setting the IP address for the DAD unit being used for a particular site. In case multiple DAD units are assigned, each DAD unit will have its own IP address and configuration file.

To set up the Group Configuration for the DAD unit, enter the IP address. The Port will always remain 9100. Click on Choose File and select the *.h configuration file from Windows Explorer then click Open.
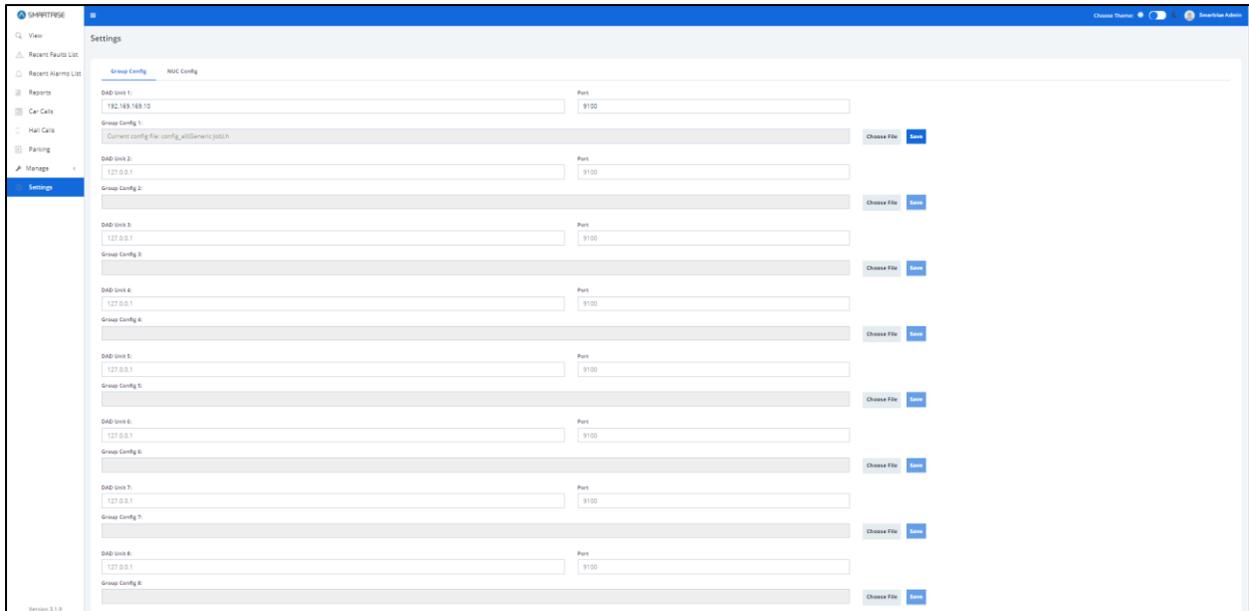
Figure 71: Settings – Group Configuration-LM

When completed configuring the DAD unit, click on the Save button. A success-pop up is displayed . Click on OK to proceed on updating the file.
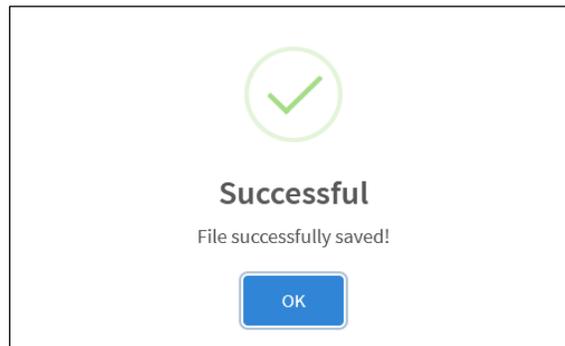

Figure 72: File successfully saved! Pop-Up

15.2   NUC Configuration

The NUC's settings merely shows NUC configuration information.
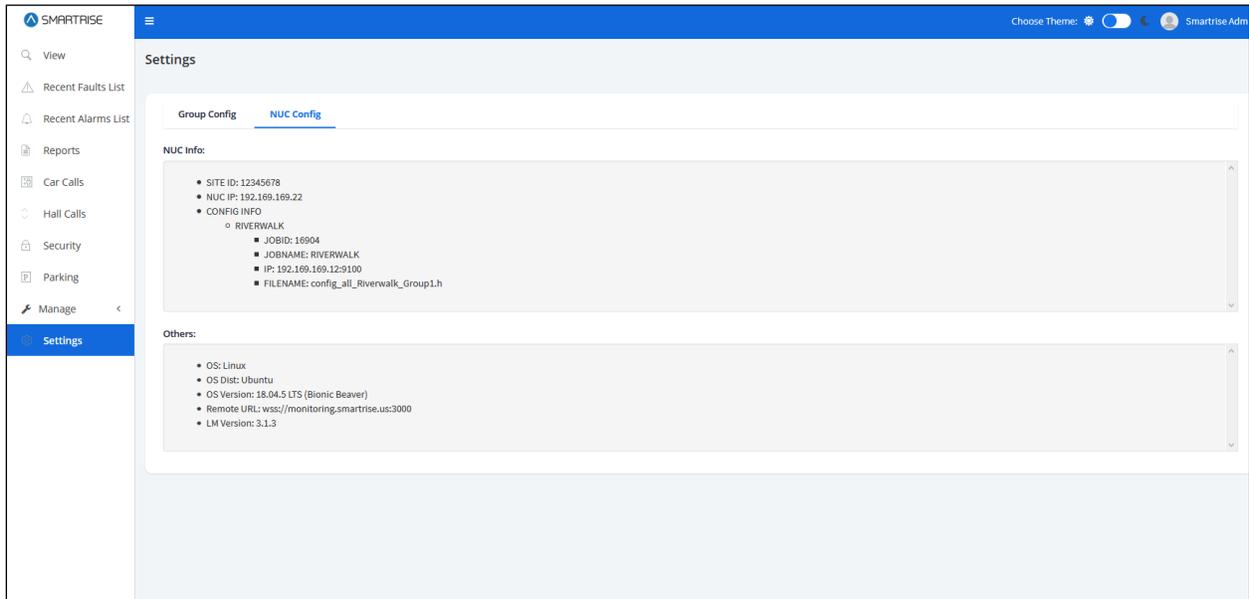
Figure 73: NUC Configuration

16 Remote Monitoring Application

The Remote Monitoring Application allows authorized users to configure the application from a remote location.

16.1 Dashboard

In the RM application, the Dashboard allows authorized users to search and filter contractors by location as well as monitor and manage users.
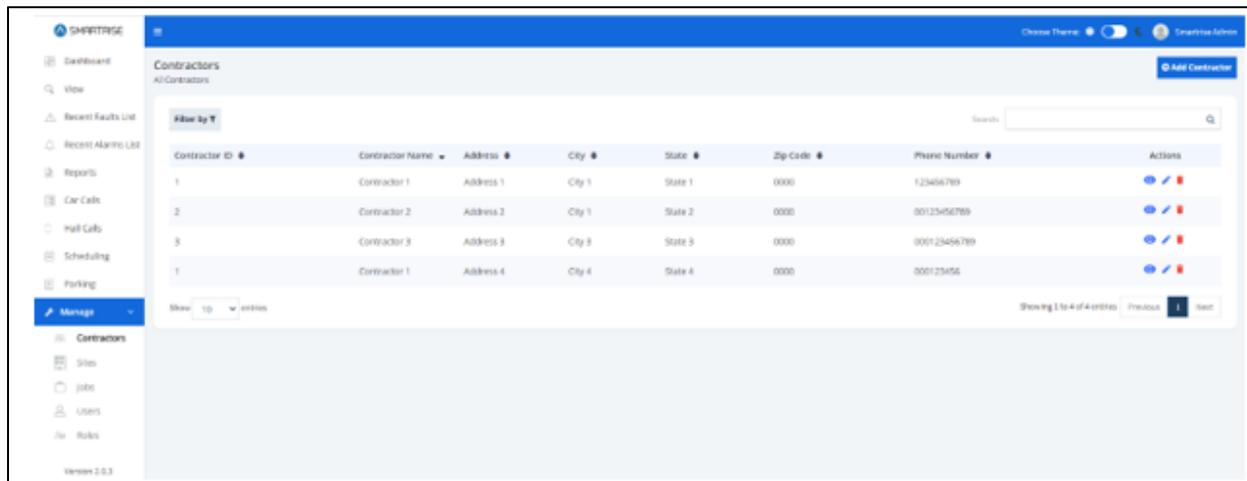

Figure 74: Super Admin Dashboard

16.2   Manage -RM

In the RM application, the Manage Module allows authorized users to coordinate Contractors, Sites, Jobs, Users, and Roles in the system.

16.2.1   Contractors

The Manage Contractors section allows authorized users to manage contractor records. Records can be filtered and searched by ID, Name, Address, City, State, Zip Code, and Phone Number. Users can add, view, edit, and delete Contractor details. Each contractor monitors and tracks elevator sites, and its subsequent users. Every contractor might include several sites.

Figure 75: Manage Contractors-RM

16.2.1.1   Add Contractor

To add a new contractor, click on the Add Contractor button. The Add Contractor screen is displayed, prompting for the new contractor's information.

- Contractor ID
- Contractor Name
- Address
- State
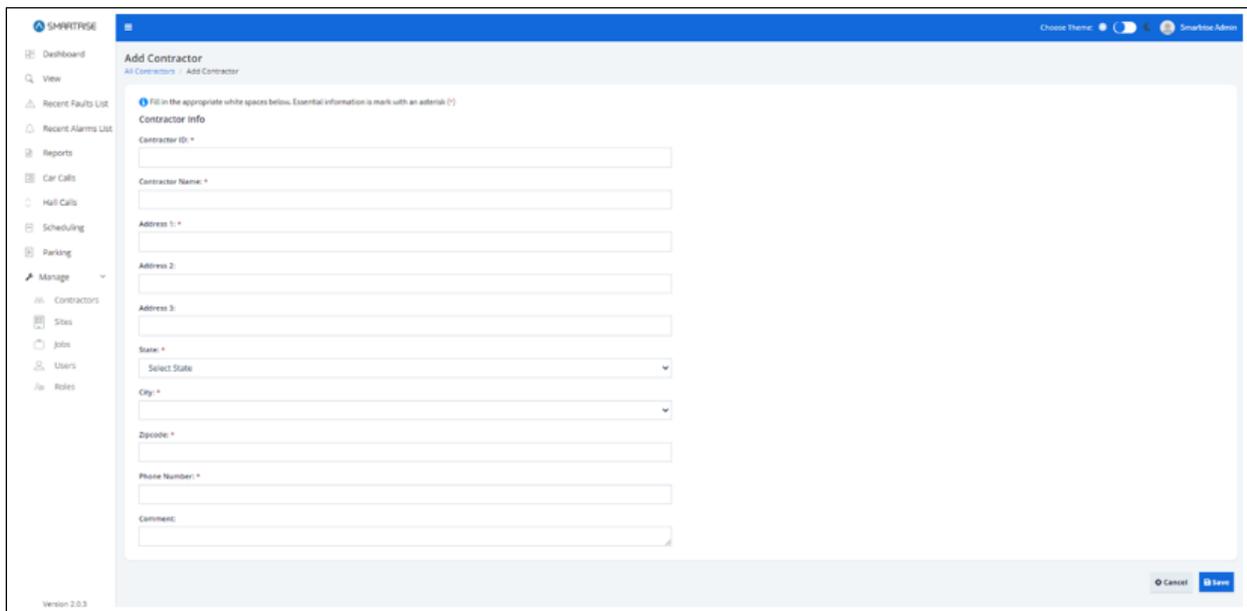- City
- Zip Code
- Phone Number
- Comment (Optional)

Figure 76: Add Contractor RM

When completed adding the contractor information, click on the Save button. If a mandatory field has not been filled out correctly, a Warning pop-up is displayed.
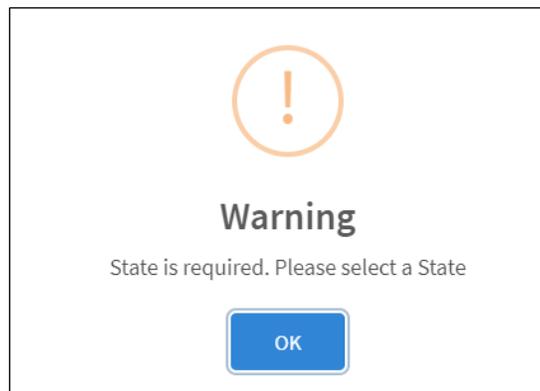

Figure 77: Warning Pop-up

Upon successful submission, a pop-up displays informing a new contractor has been added successfully.
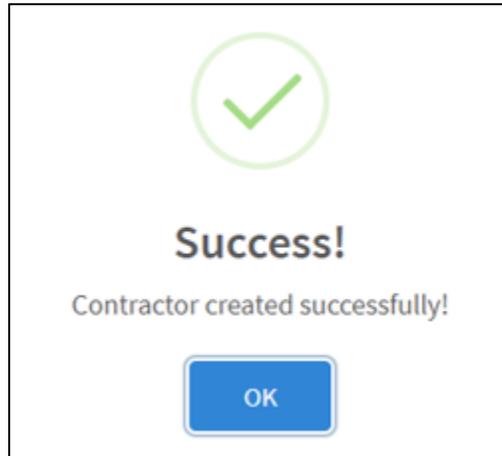

Figure 78: Contractor created successfully! Pop-up

Click the OK button. The View Contractor screen is displayed. The View Contractor screen consists of two sections.

- Section 1 – Contractor's contact information
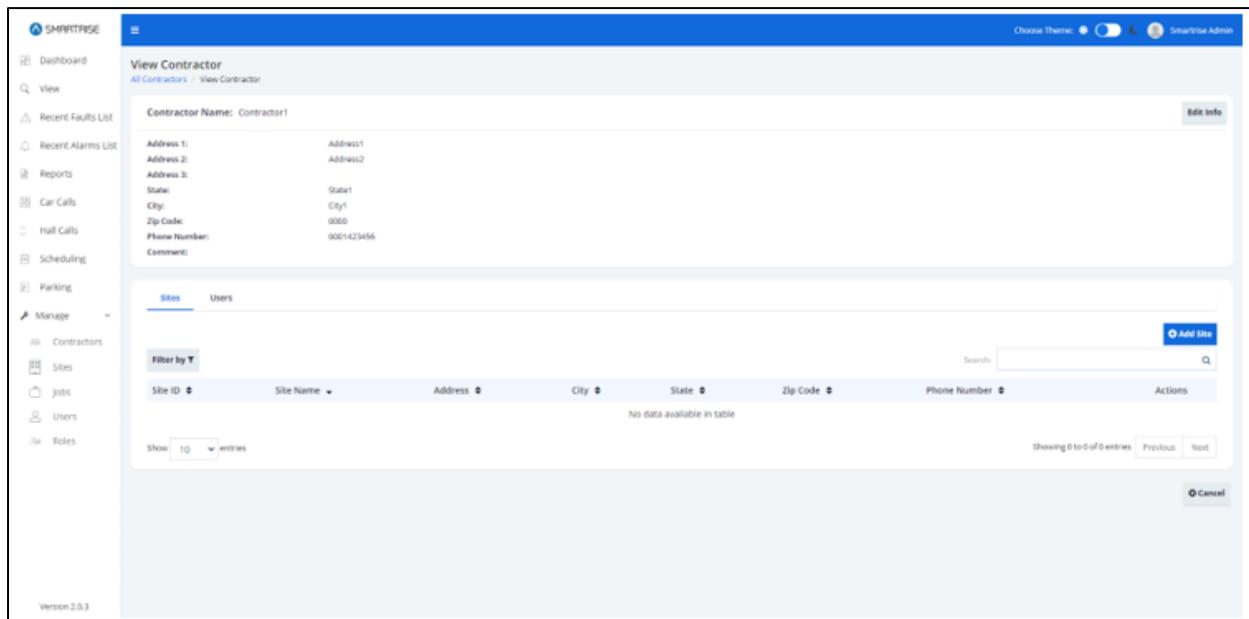- Section 2 – Assigned Sites and Users

Figure 79: View Contractor-RM

16.2.1.2 View Contractors

The View Contractor screen allows an authorized user to view contractor's contact information and the assigned sites and users. From this screen the authorized user can also add, edit, and delete Sites or User records.

There are two ways to view contractor information.

- From the Manage Contractors screen – Click View under the Actions column
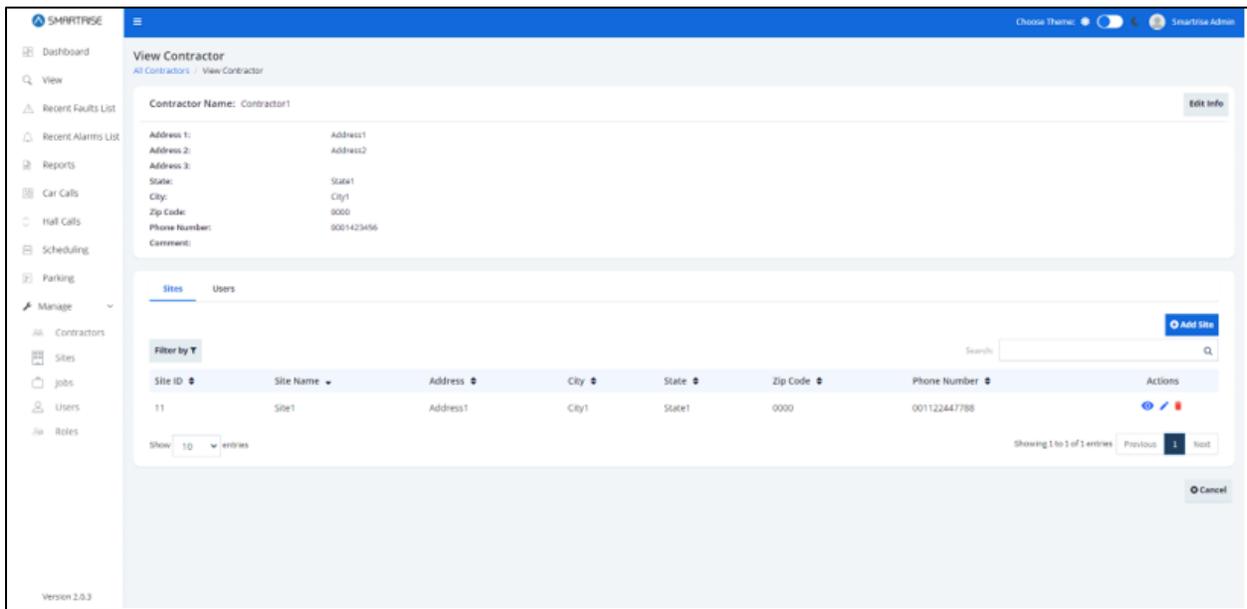- After a contractor has been added and the authorized user clicks OK from the Successful pop-up
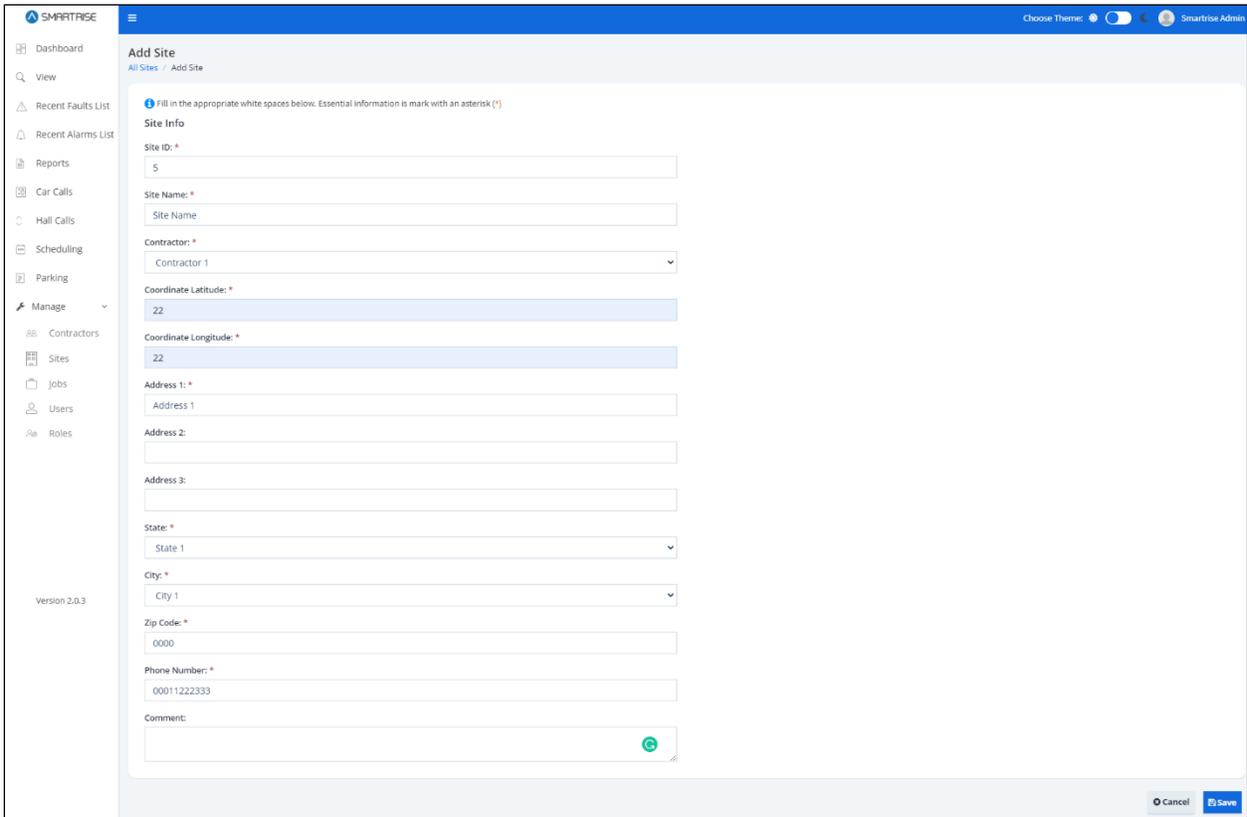

Figure 80: View Contractor – Sites
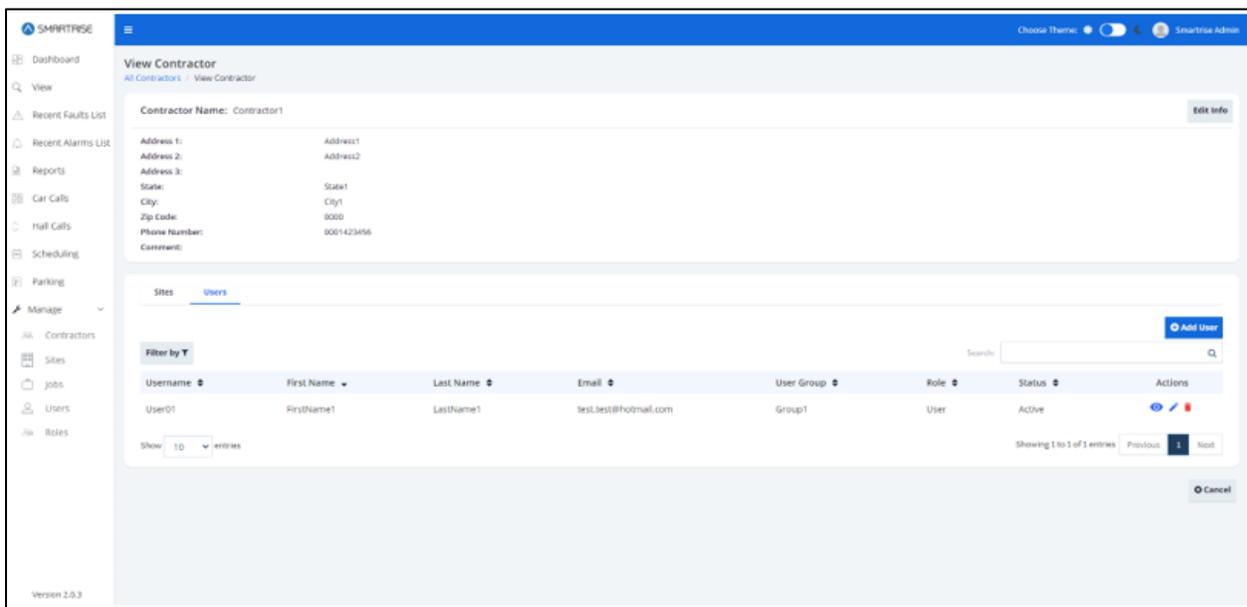
Figure 81: View Contractor – User

16.2.1.3 Add Site

To add a new site, go to the Site tab and click on the Add Site button. The Add Site screen is displayed, prompting for the new site's information:

- Site ID
- Site Name
- Contractor
- Coordinates (latitude, longitude)
- Address
- State
- City
- Zip Code
- Phone Number
- Comment (Optional)

Figure 82: Add Site (Contractor)-RM

When completed adding a site, click on the Save button. If a mandatory field has not been filled out correctly, a Warning pop-up is displayed.
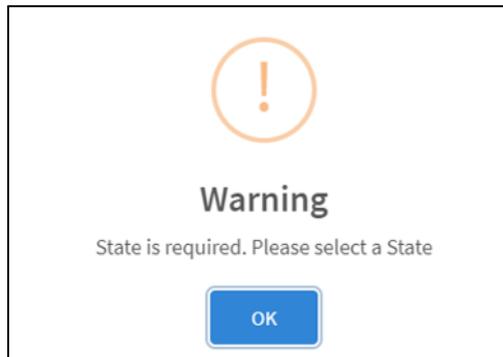

Figure 83: Warning Pop-Up

Upon successful submission, a pop-up displays informing a new site has been added successfully.
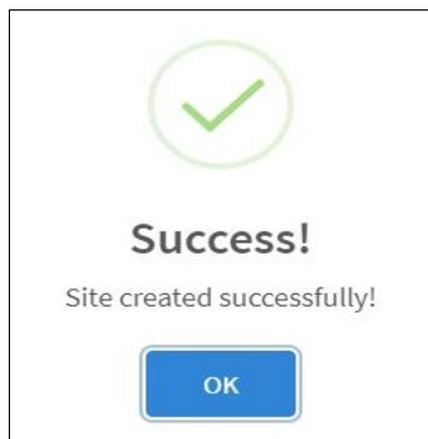

Figure 84: Site created successfully! Pop-up

Click the OK button. The system returns to the View Contractor screen showing the added site under the Site tab.
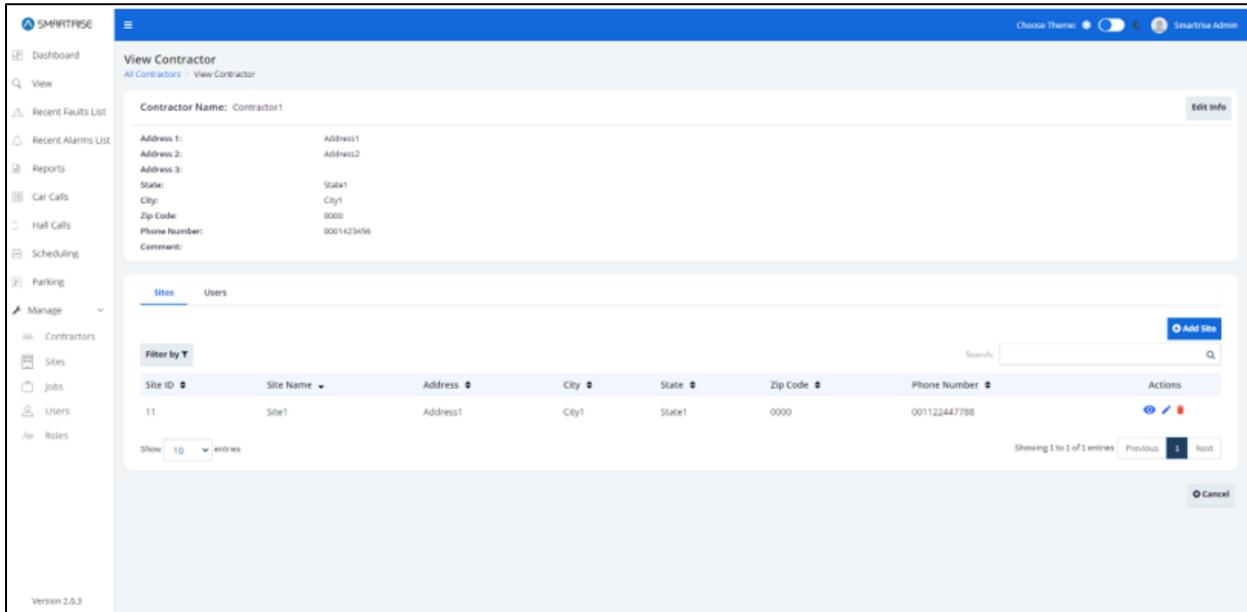

Figure 85: View Contractor-Added Site-RM

16.2.1.4   Add User

To add a new user, go to the User tab and click on the Add User button. The Add User screen is displayed, prompting for the new user's basic information.

- Last Name
- Email Address
- Contact Number
- Status – Whether Active or Inactive (checkmark corresponds to Active)
- Username
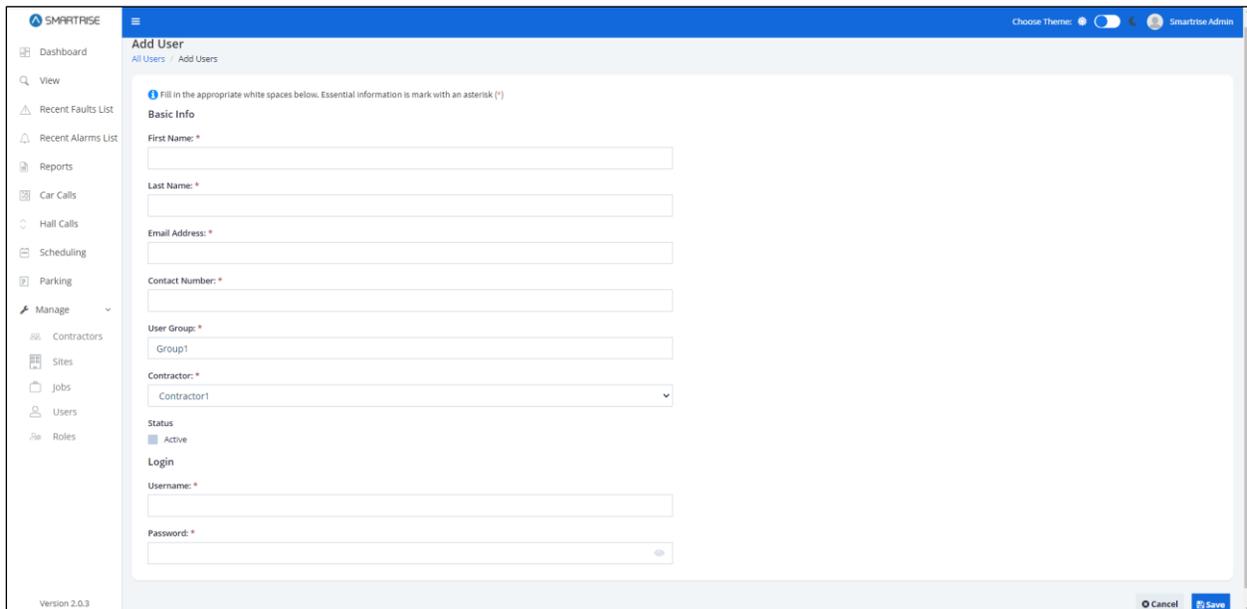- Password – Must consist of uppercase, number, special characters, and length criteria

Figure 86: Add User (Contractor)-RM

When completed adding a new user, click on the Save button. If no information has been entered in a required field, a value is required message is displayed for that field.
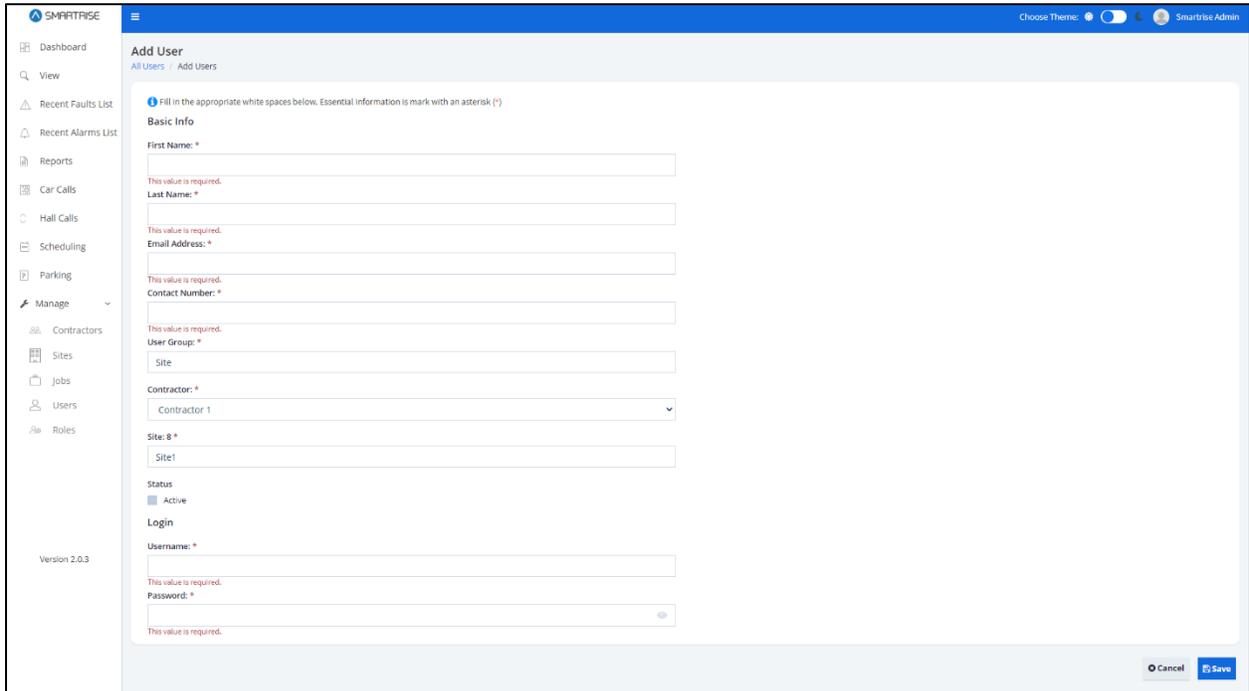

Figure 87: Contractor Add User – Value is Required Message

Upon successful submission, a pop-up displays informing a new user has been added successfully.
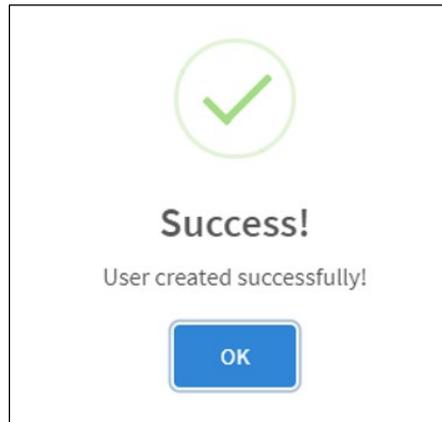

Figure 88: User created successfully! Pop-Up

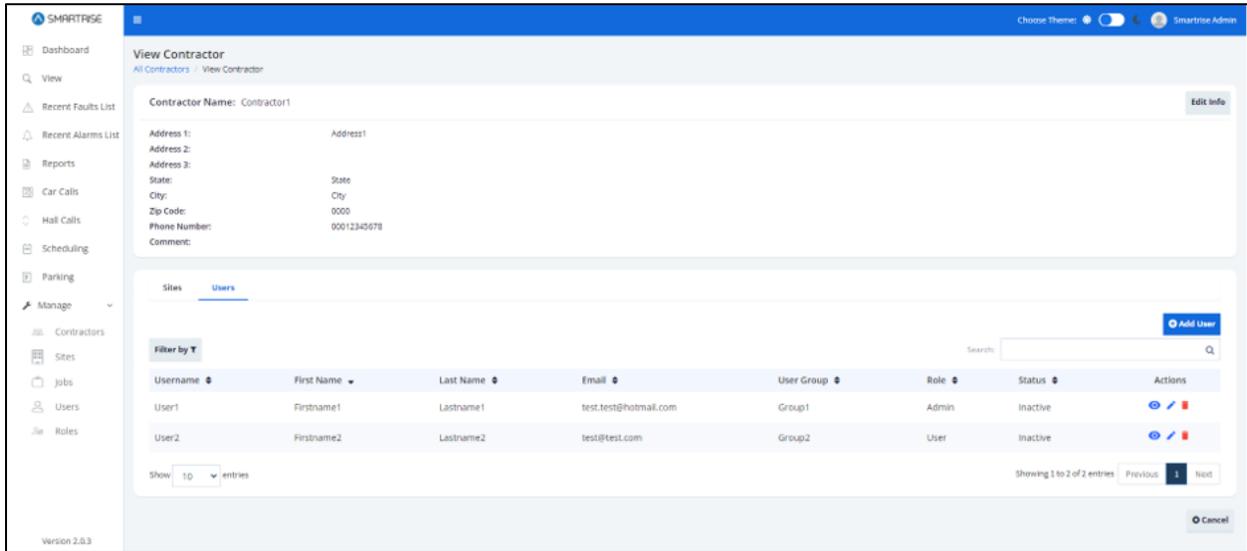Click the OK button. The system returns to the View Contractor screen showing the added user under the Users tab.

Figure 89: Added User (Contractor)-RM

16.2.1.5 Edit Contractor

Contractor information can be updated when there is a change of to the contractor's contact information.

There are two ways to edit contractor's information.

- From the View Contractors screen – Click Edit Info button
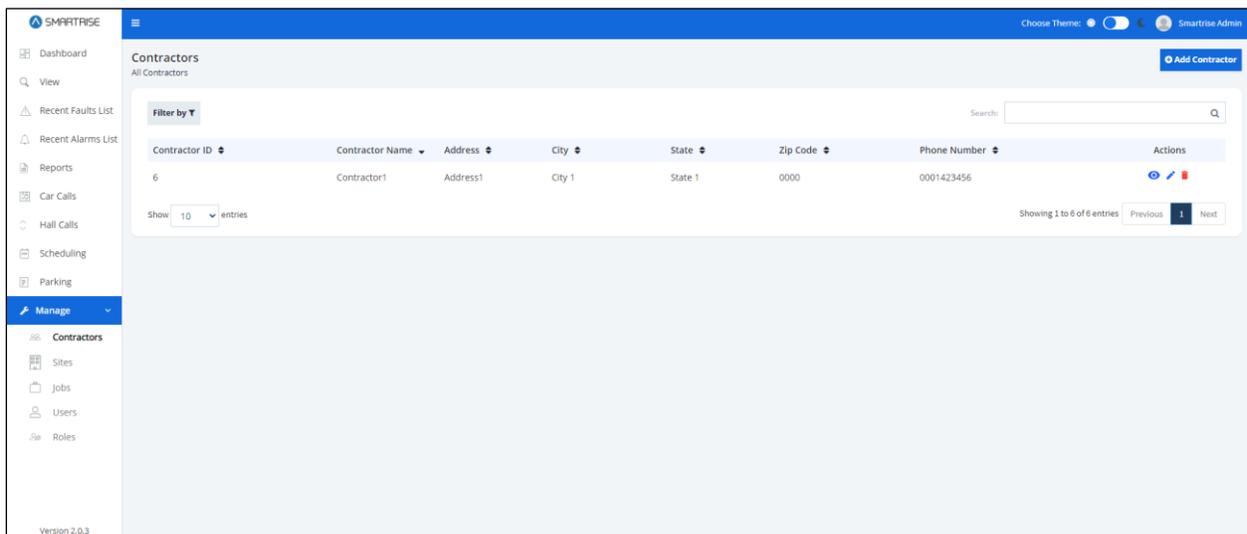- From the Manage Contractors screen – Click Edit under the Actions column

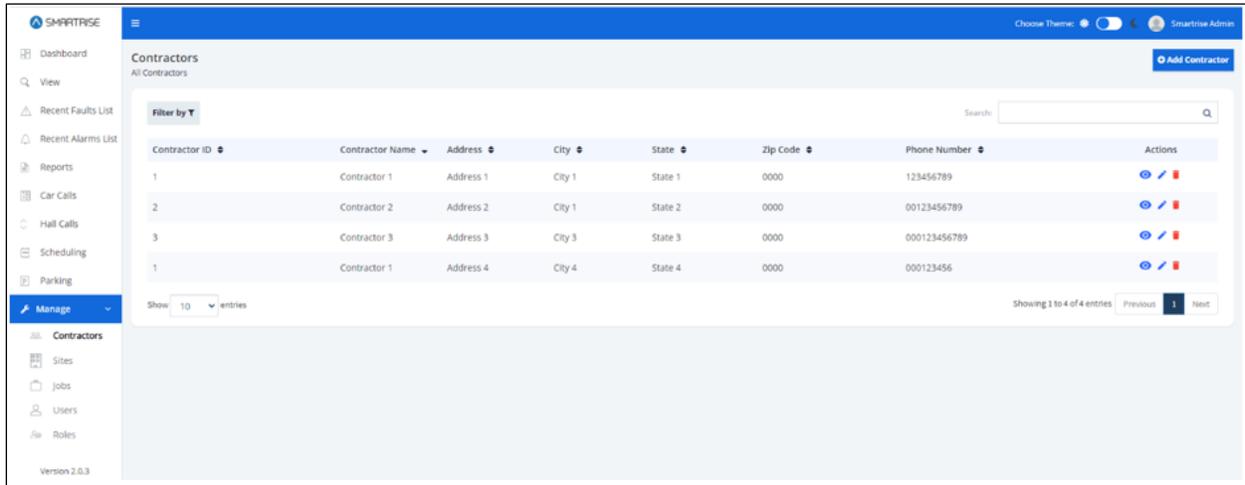*Figure 90: View Contractor – Edit Info Button*

Figure 91: Manage Contractor – Edit User

From the Edit Contractor screen, update the information and click Save.
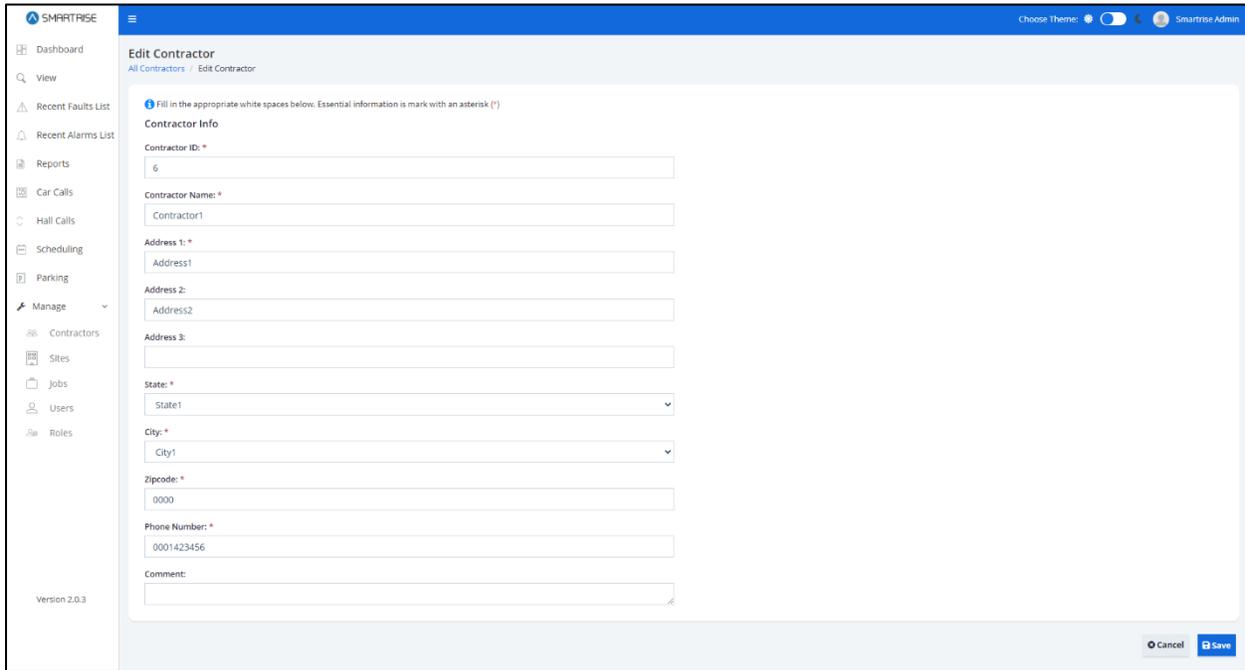

Figure 92: Edit Contractor-RM

Upon completion, a pop-up displays informing the contractor's information has been updated successfully.
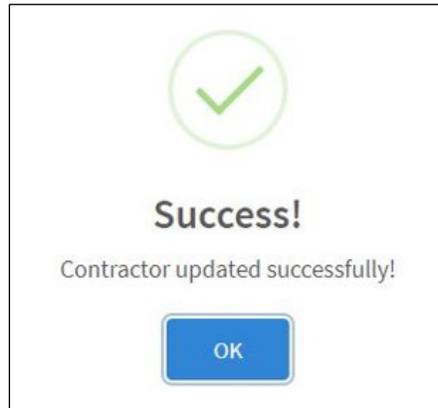

Figure 93: Contractor updated successfully! RM

16.2.1.6 Delete Contractor

A contractor can be deleted by clicking on the Delete Contractor button under Actions column for that contractor on the Manage Contractor screen. A pop-up displays prompting confirmation from the Administrator.
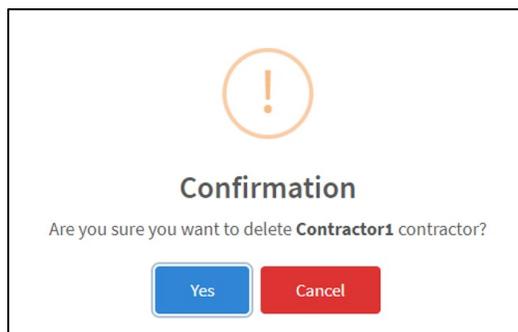

Figure 94: Delete contractor? Pop-Up

Upon confirmation, a success pop-up displays informing that the contractor has been successfully deleted.
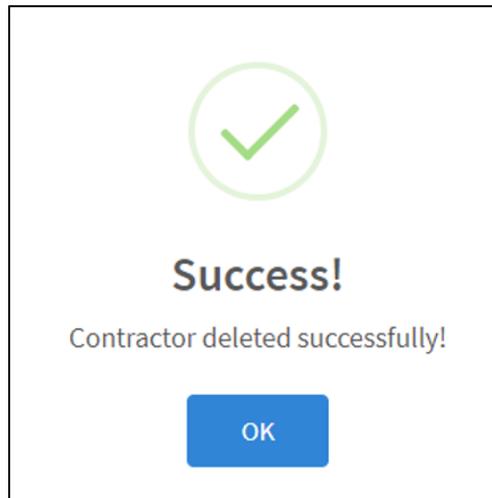

Figure 95: Contractor deleted successfully! Pop-Up

16.2.2 Sites

The Manage Sites section allows authorized users to manage site records. Records can be filtered and searched by ID, Name, Address, City, State, Zip Code, and Phone Number. Users can add, view, edit, and delete site details. each site must be assigned to a single contractor.
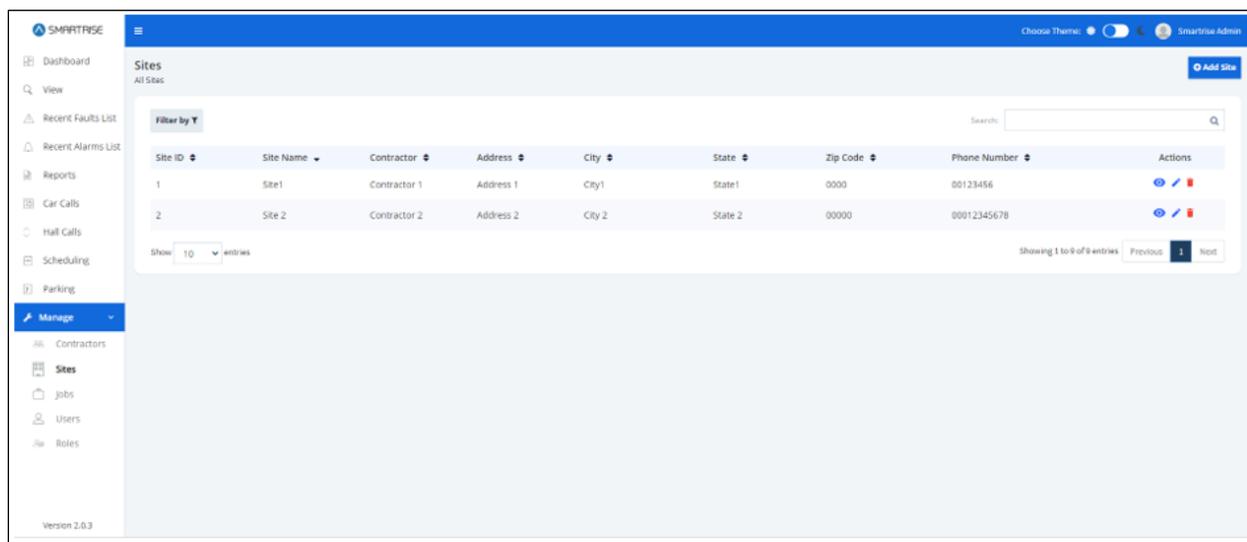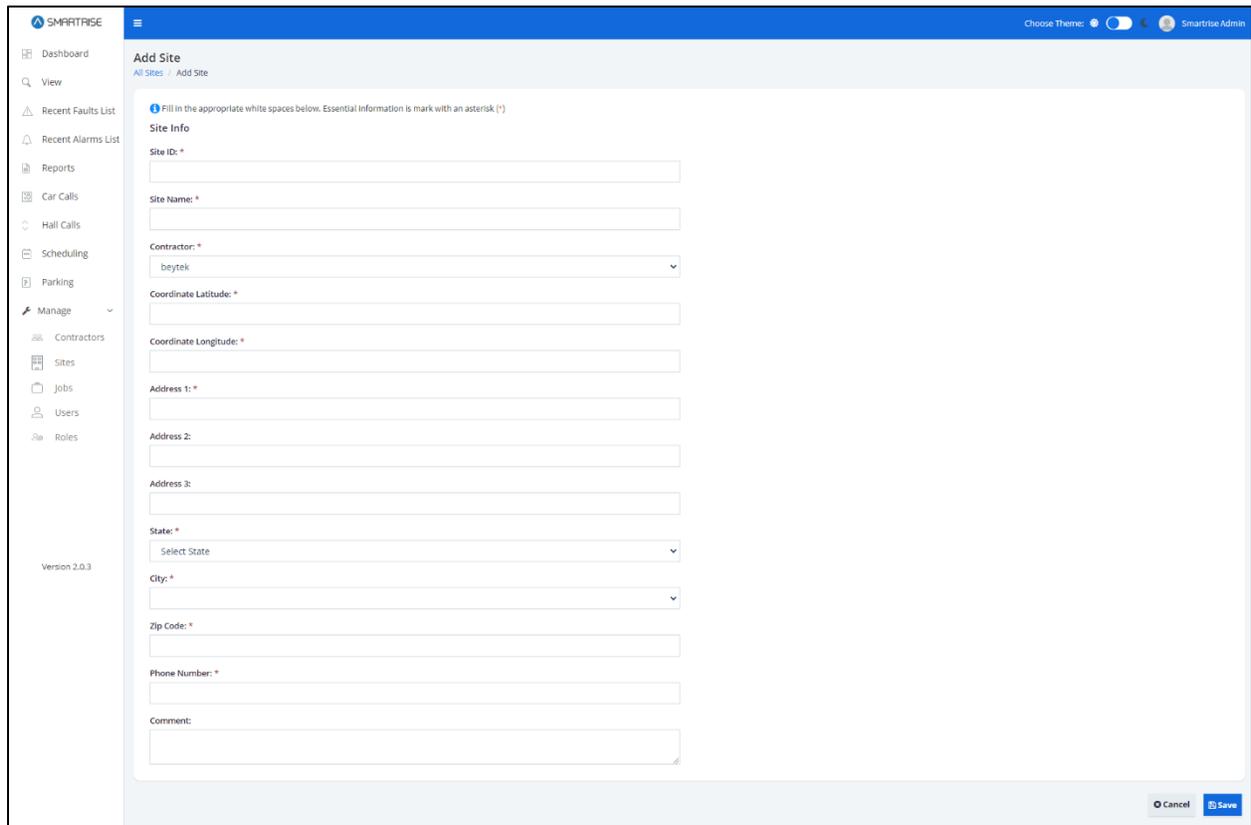

Figure 96: Manage Sites-RM

16.2.2.1   Add Site

To add a new site, click on the Add Site button. The Add Site screen is displayed, prompting for the new site's information.

- Site ID
- Site Name
- Contractor
- Coordinates (latitude, longitude)
- Address
- State
- City
- Zip Code
- Phone Number
- Comment (optional)

Figure 97: Add Site(Site) RM

When completed adding a new site, click on the Save button. If no information has been entered in a required field, a value is required message is displayed for that field.
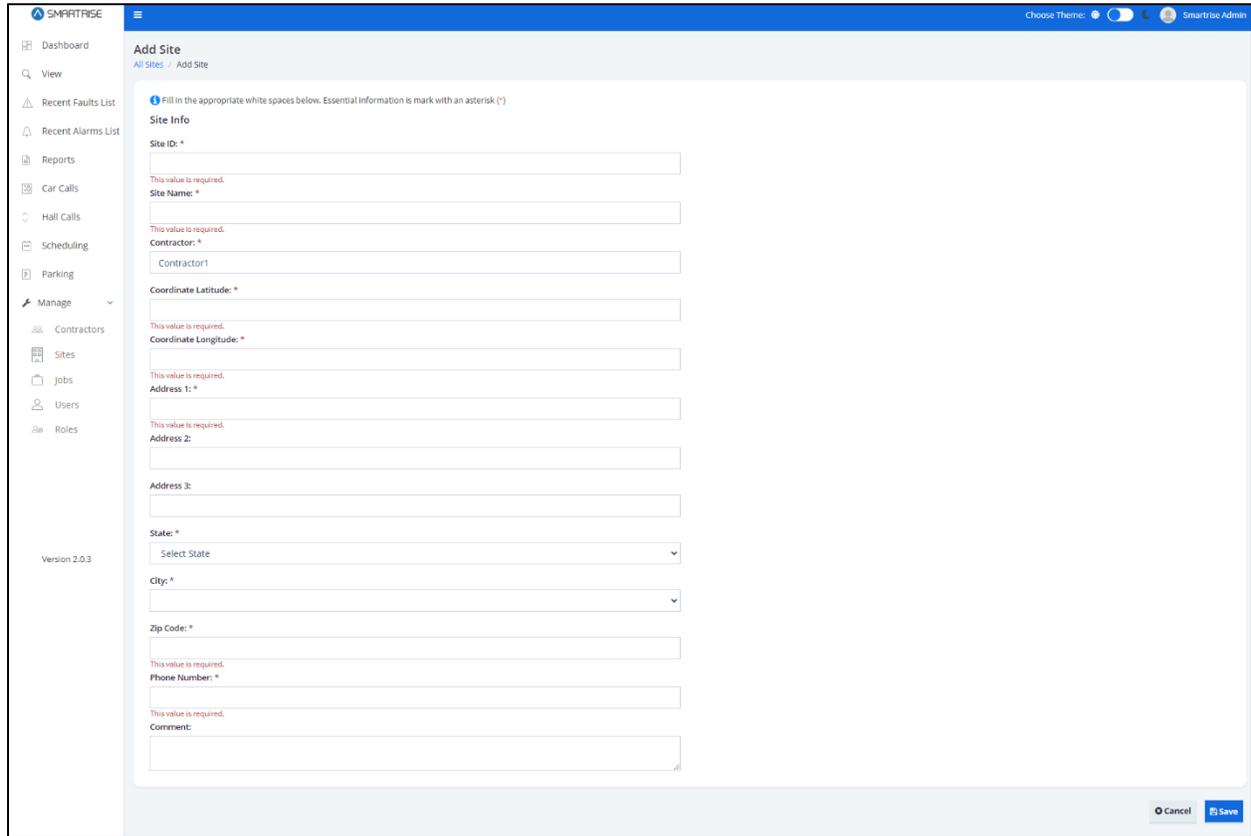

Figure 98: Add Site – Value is Required Message

Upon successful submission, a pop-up displays informing a new site has been added successfully.
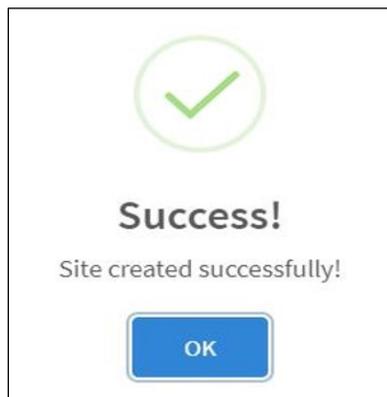

Figure 99: Site created successfully! Pop-up

Click the OK button. The View Site screen is displayed. The View Site screen consists of two sections.

- Section 1 – Displays the location and contact information of the site.
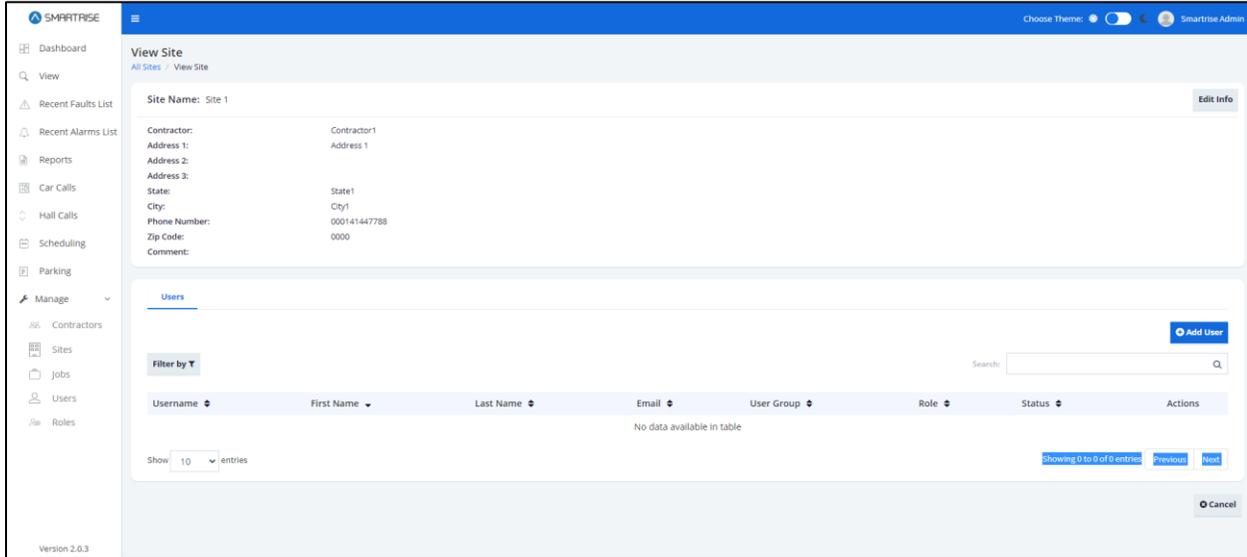- Section 2 – Assigned users to the site.

Figure 100: View Site-RM

16.2.2.2   View Site

The View Site screen allows an authorized user to view name and location of the site and assigned users.

There are two ways to view site information.

- From the Manage Sites screen – Click View under the Actions column.
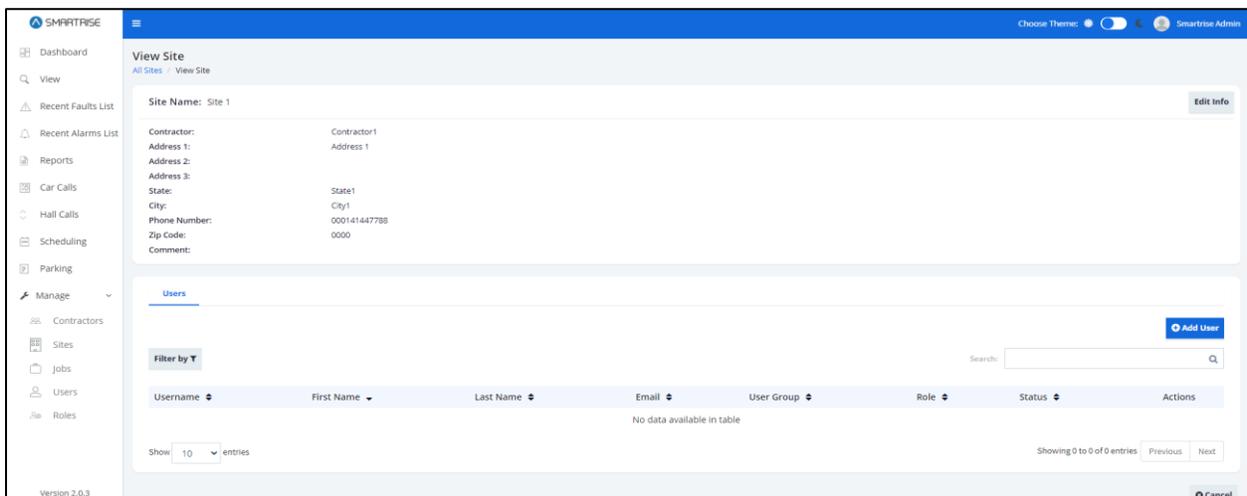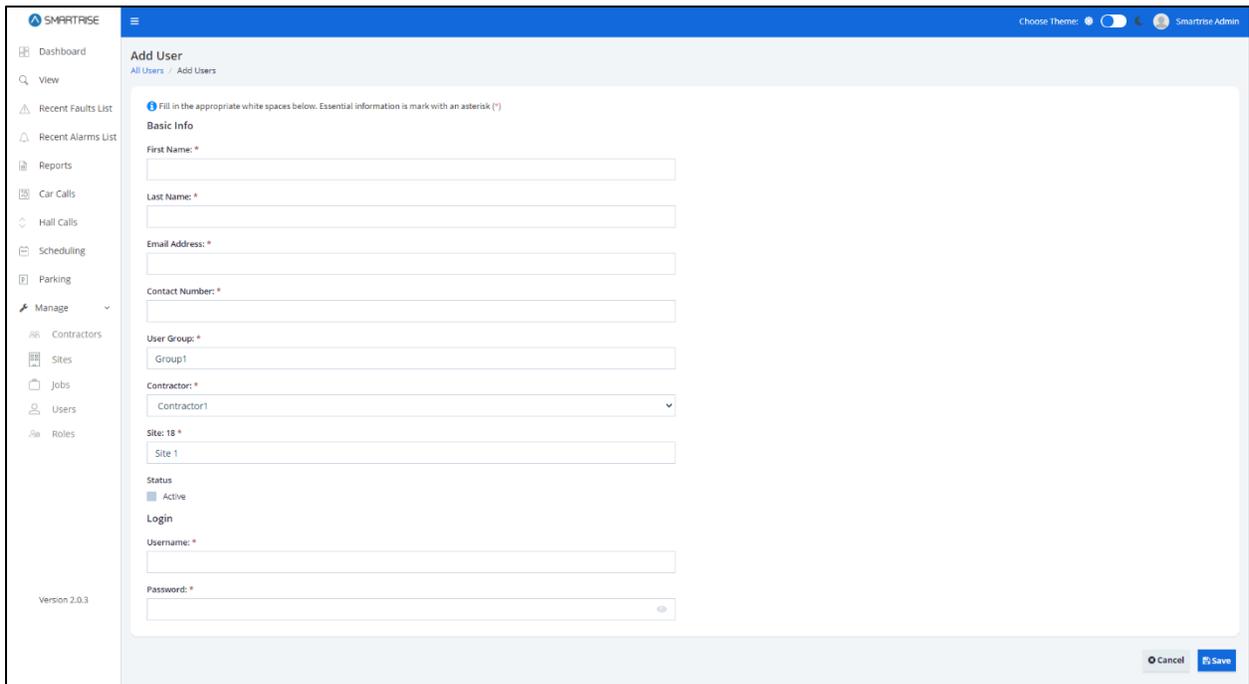- After a site has been added and the authorized user clicks OK from the Successful pop-up.

Figure 101: View Site – User

16.2.2.3   Add User

To add a new user, click on the Add User button. The Add User screen is displayed, prompting for the new user's basic information.

- First Name
- Last Name
- Email Address
- Contact Number
- User Group
- Contractor
- Site
- Status – Whether Active or Inactive (checkmark corresponds to Active)
- Username
- Password – Must consist of uppercase, number, special characters, and length criteria

Figure 102: Add User RM

When completed adding a new user, click on the Save button. If no information has been entered in a required field, a value is required message is displayed for that field.
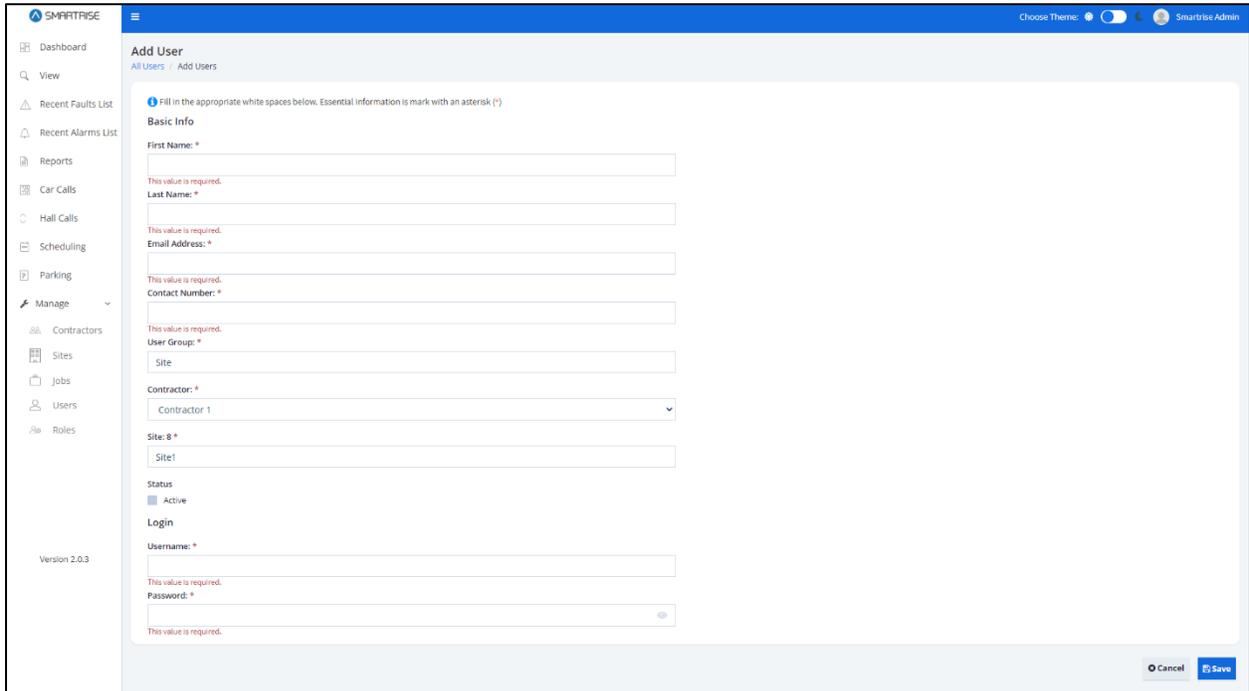

Figure 103: Site Add User – Value is Required Message

Upon successful submission, a pop-up displays informing a new user has been added successfully.
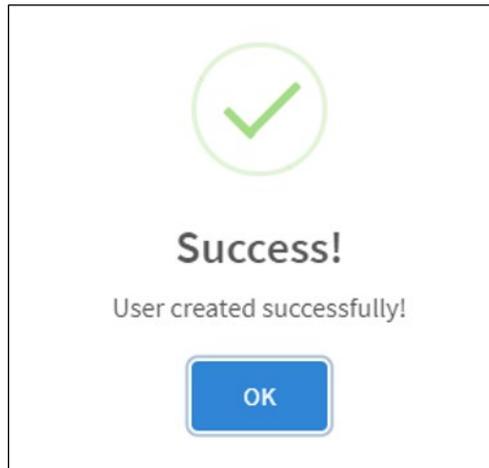

Figure 104: User created successfully! Pop-Up

Click the OK button. The system returns to the View Site screen showing the added user.
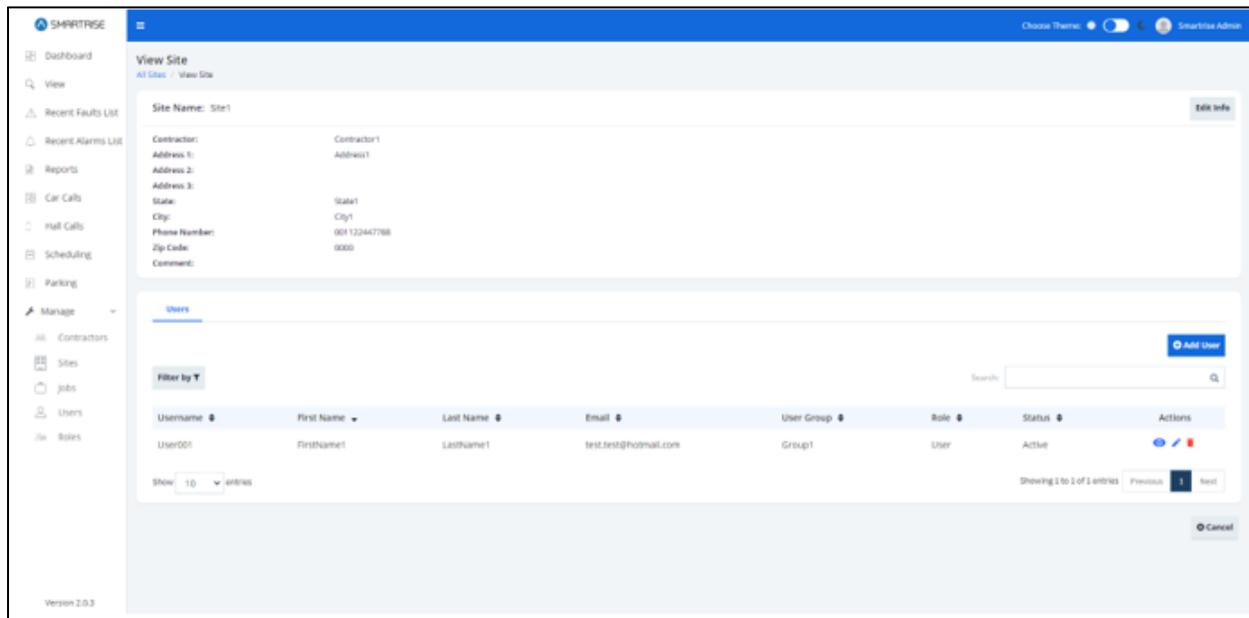

Figure 105: Added User

16.2.2.4   Edit Site

Site information can be updated when there is a change to the site's location.

There are two ways to edit site information.

- From the View Sites screen – Click Edit Info button
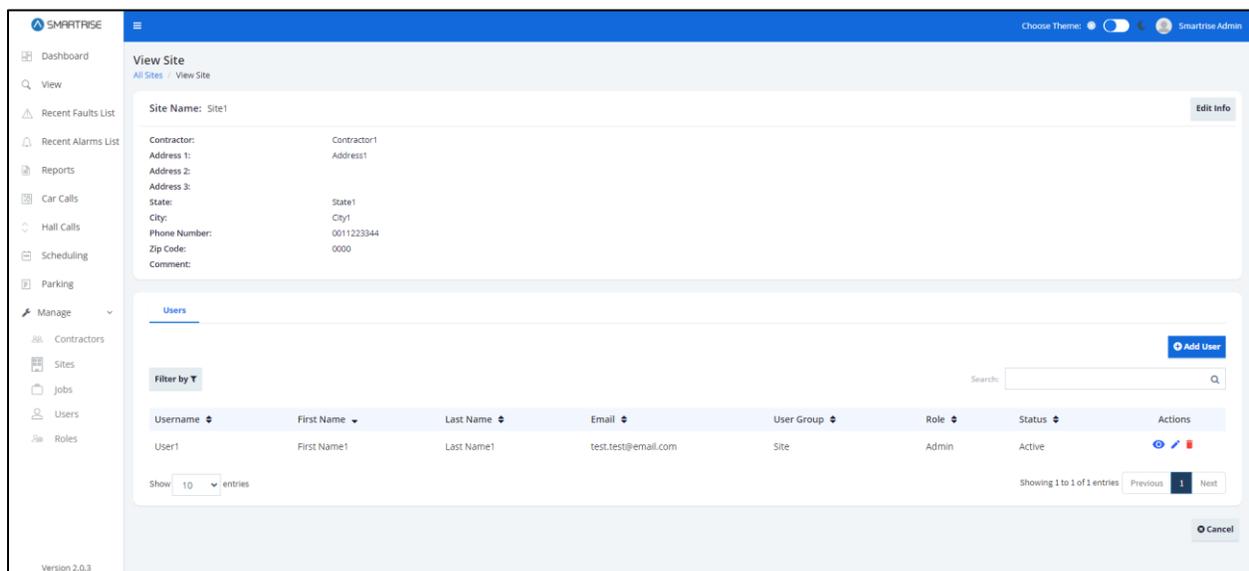- From the Manage Sites screen – Click Edit under the Actions column

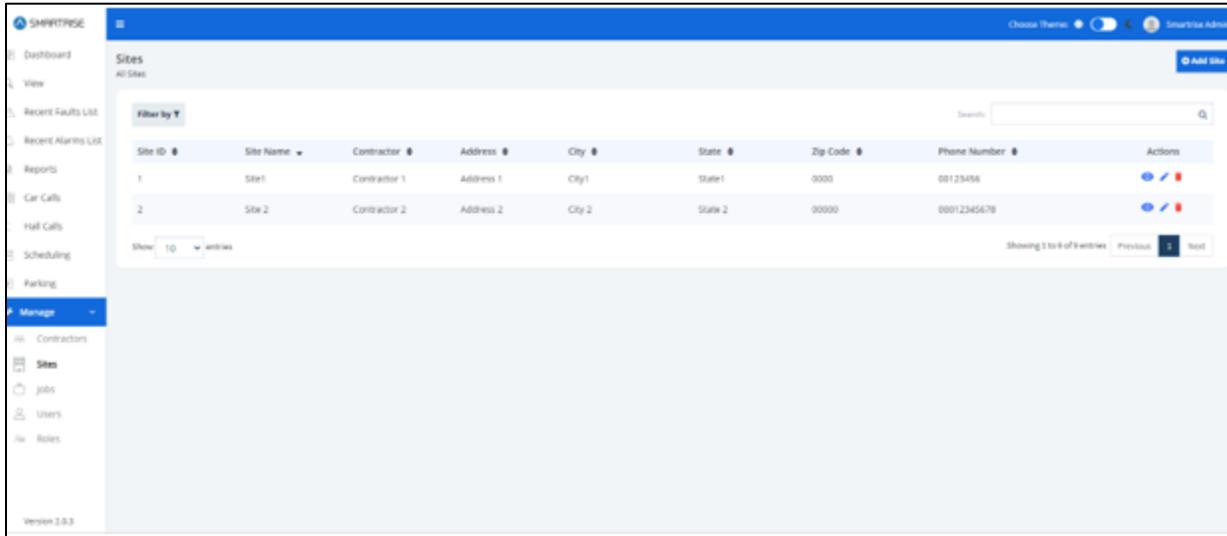*Figure 106: View Site – Edit Info Button RM*

Figure 107: Manage Site – Edit User RM

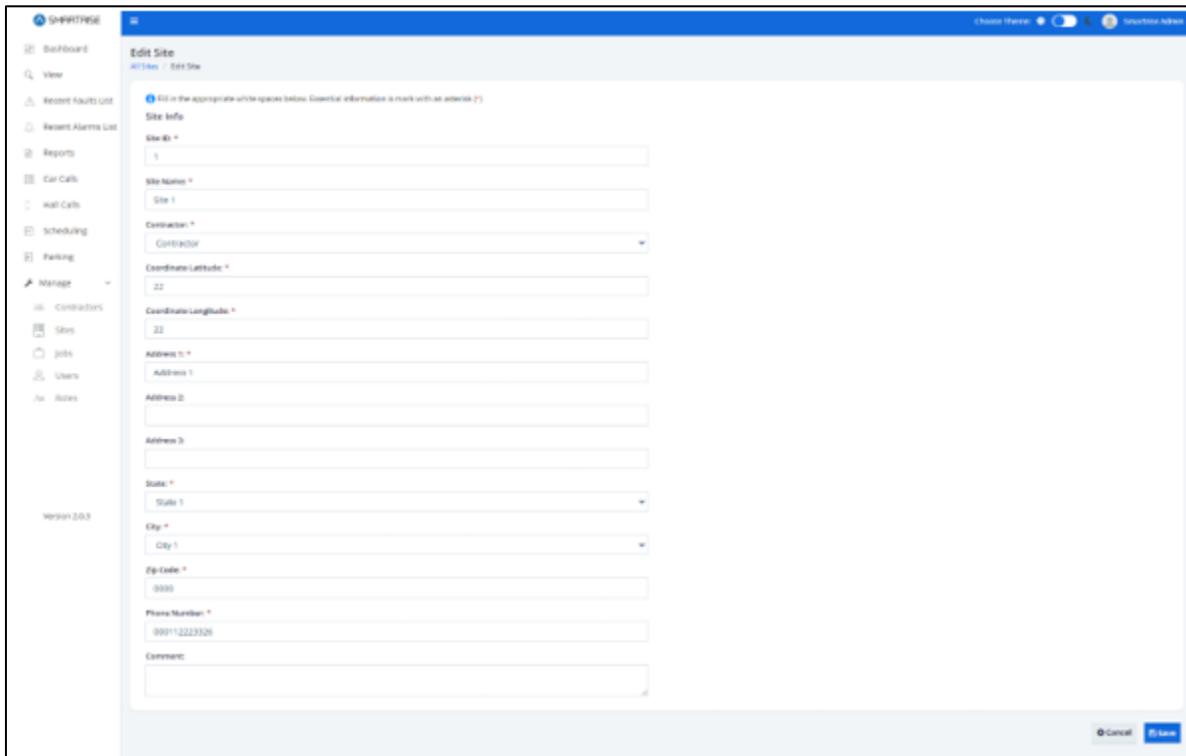From the Edit Site screen, update the information and click Save.

Figure 108: Edit Site RM

Upon completion, a pop-up displays informing the sites information has been updated successfully.
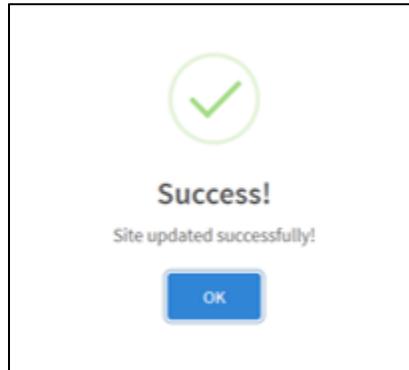

Figure 109: Site updated successfully!

16.2.2.5 Delete Site

A site can be deleted by clicking on the Delete Site button under Actions column for that site on the Manage Site screen. A pop-up displays prompting confirmation from the Admin.
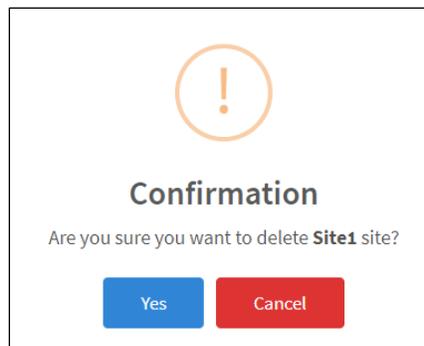

Figure 110: Delete site? Pop-Up

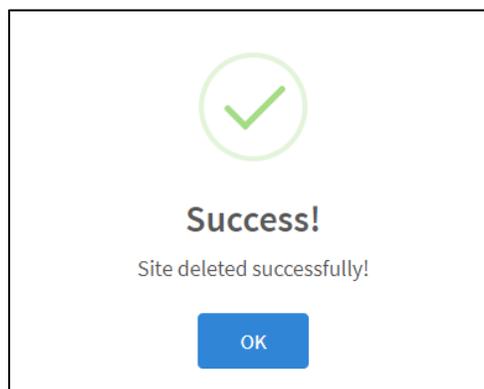Upon confirmation, a success pop-up displays informing that the site has been successfully deleted.

Figure 111: Site deleted successfully!

16.2.3   Jobs

The Manage Jobs section allows authorized users to manage job records. Records can be filtered differently based on the user's role. Users can add, view, edit, and delete job details. Records can be sorted and searched by the details on the list - Job Name, Job Number, Job ID, Group, and Assigned To (Site).
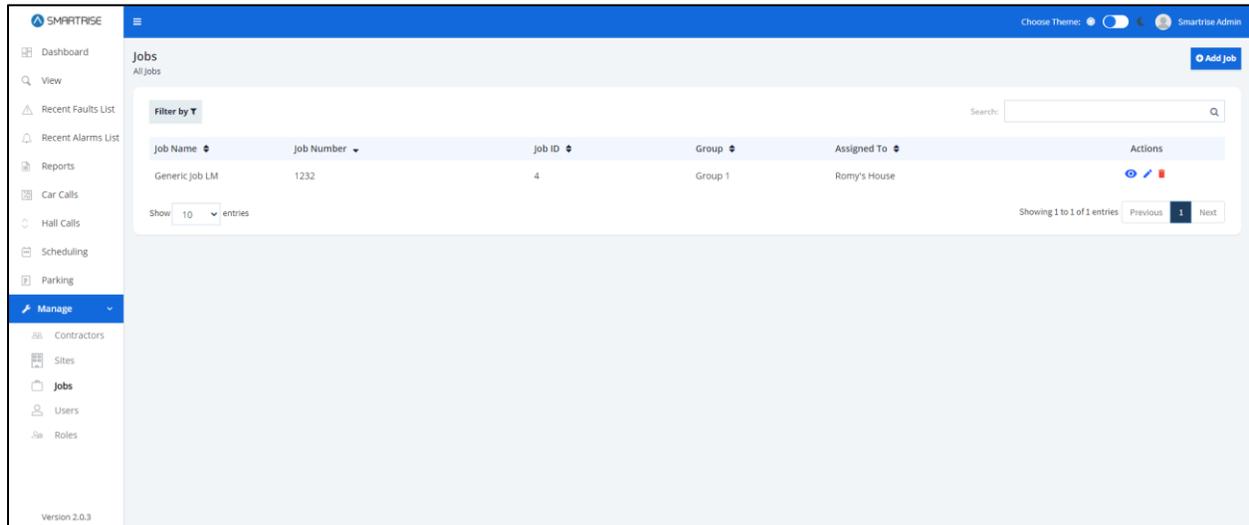

Figure 112: Manage Jobs-RM

16.2.3.1   Add Job

To add a new job, click on the Add Job button. The Add Job screen is displayed, prompting for the new job's information.

- Job Name
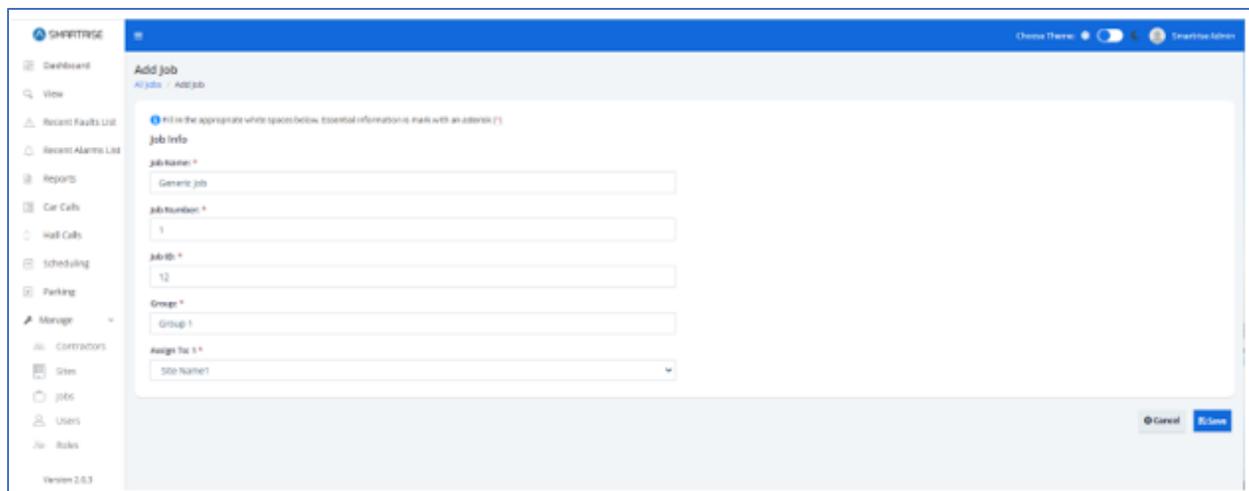- Job Number
- Job ID
- Assign To (Site)

Figure 113: Add Job-RM

When completed adding a new user, click on the Save button. If no information has been entered in a required field, a value is required message is displayed for that field.
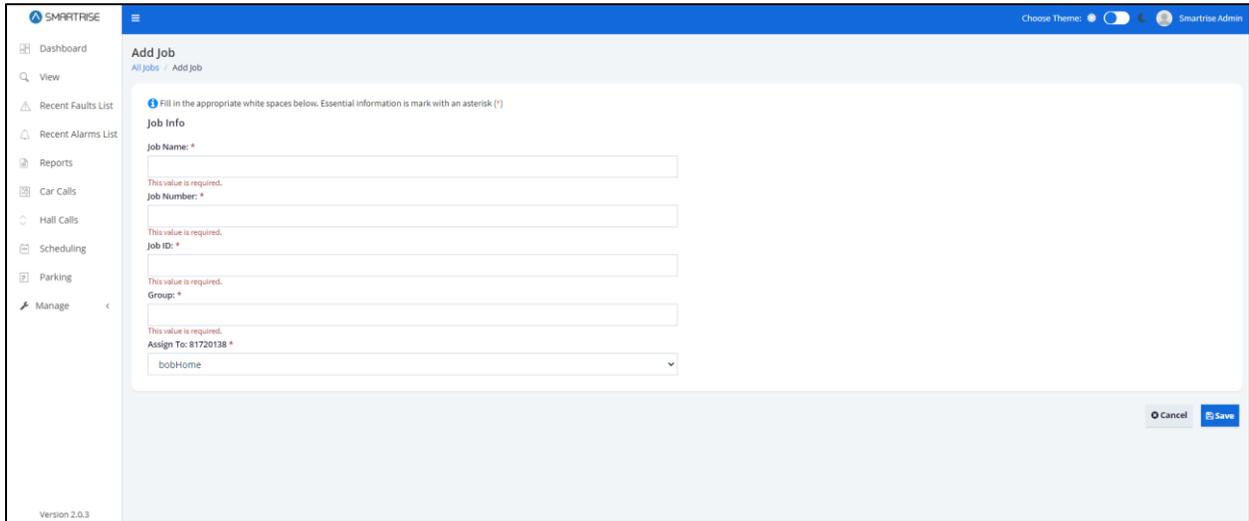

Figure 114: Add Job – Value is Required Message

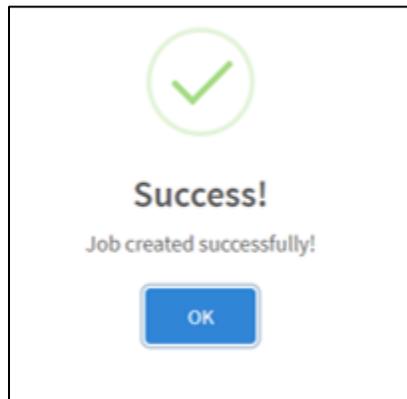Upon successful submission, a pop-up displays informing a new job has been added successfully.

Figure 115: Job created successfully! Pop-up

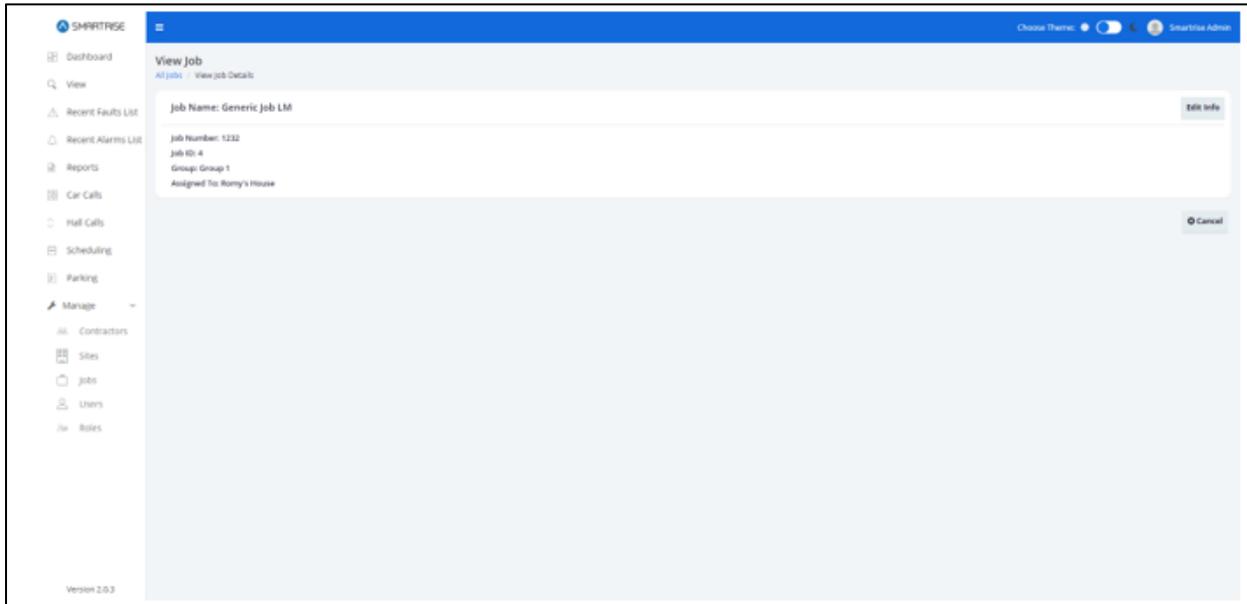Click the OK button. The View Job screen is displayed.

Figure 116: View Job-RM

16.2.3.2   View Job

The View Job screen allows an authorized user to view details about the job.

There are two ways to view job information.

- From the Manage Jobs screen – Click View under the Actions column.
- After a job has been added and the authorized user clicks OK from the Successful pop-up.
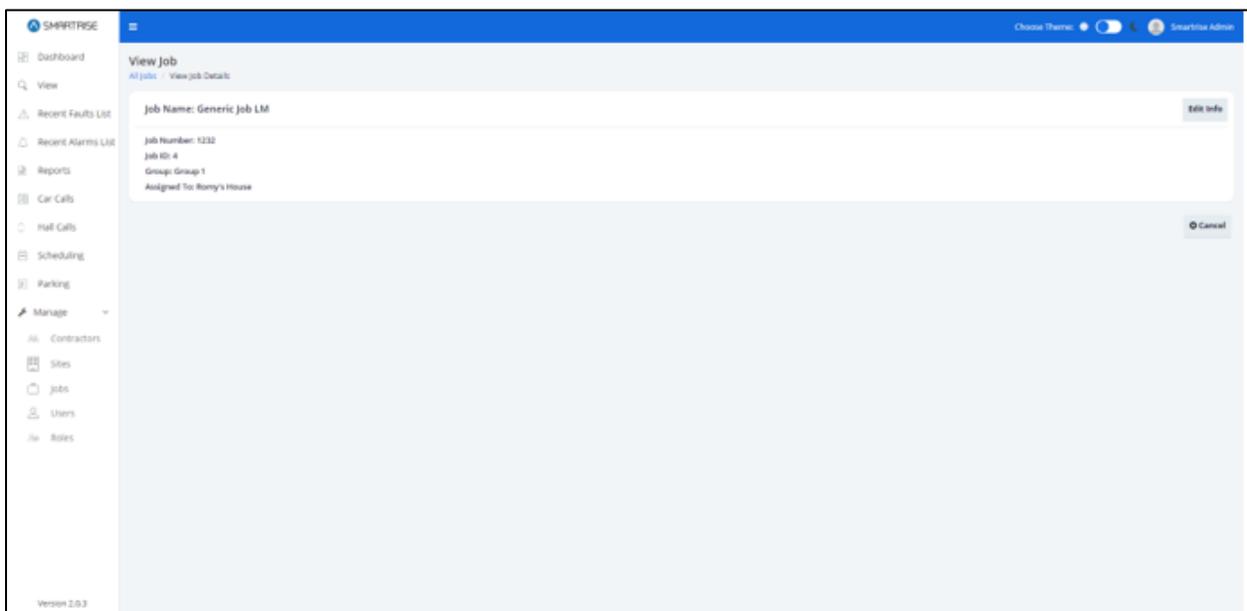

Figure 117: View Job – Created Job

16.2.3.3   Edit Job

Job information can be updated when there is a change to who is assigned to the job.

There are two ways to edit job information.

- From the View Job screen – Click Edit Info button
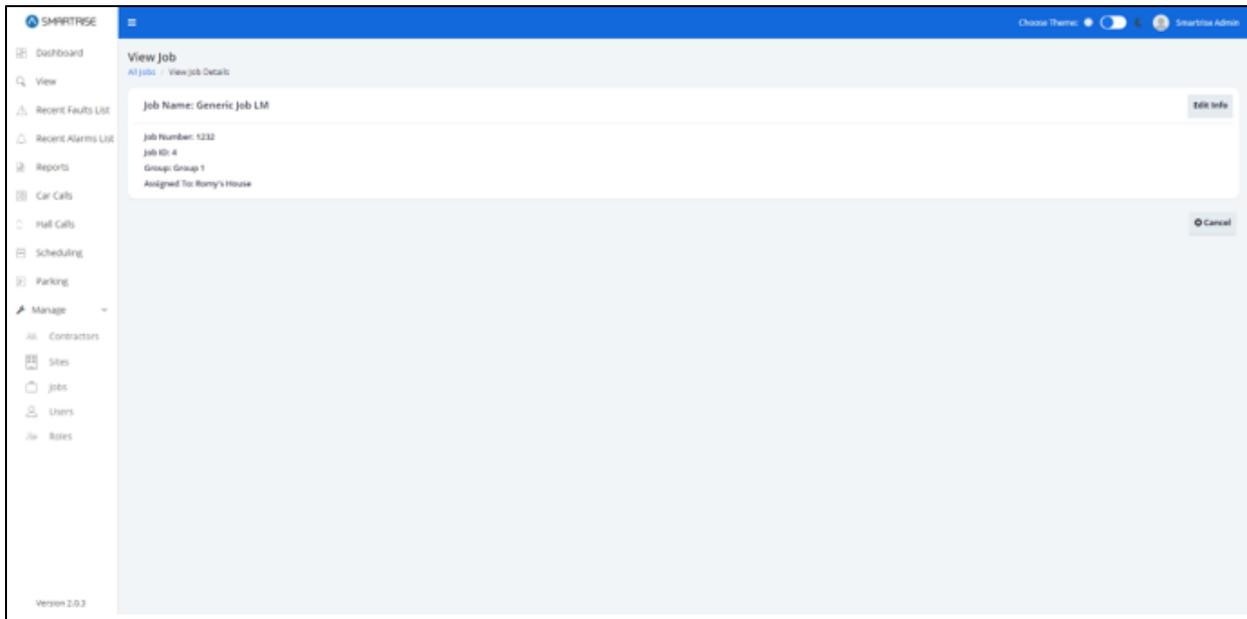- From the Manage Sites screen – Click Edit under the Actions column

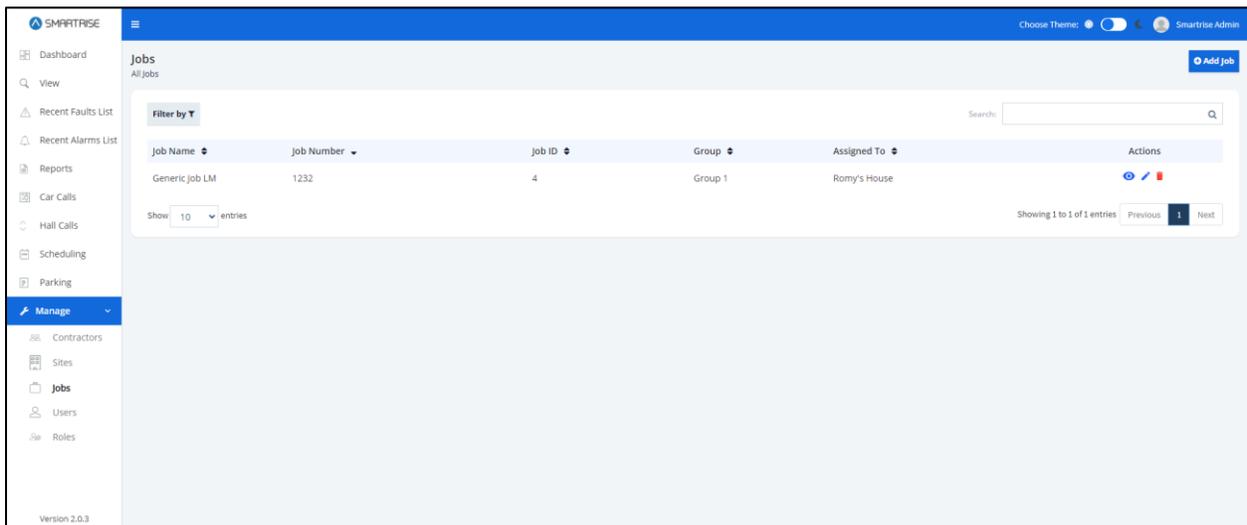*Figure 118: View Job– Edit Info Button RM*

Figure 119: Manage Job – Edit User

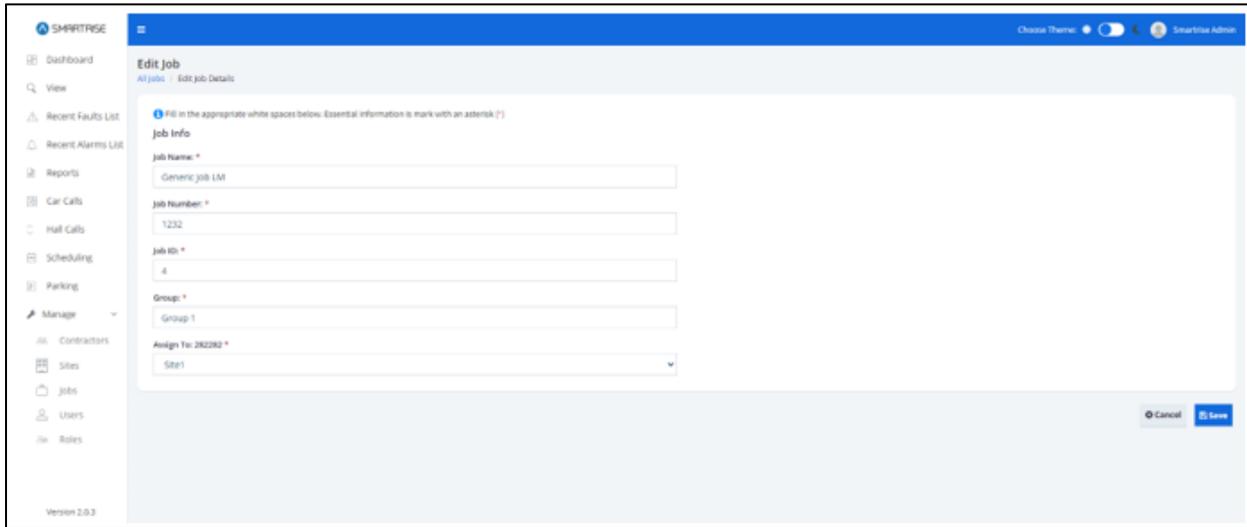From the Edit Job screen, update the information and click Save.

Figure 120: Edit Job RM

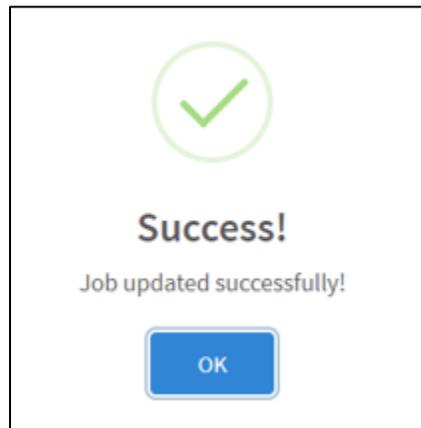Upon completion, a pop-up displays informing the jobs information has been updated successfully.

Figure 121: Job updated successfully!

16.2.3.4   Delete Job

A job can be deleted by clicking on the Delete Job button under the Actions column on the Manage Jobs screen. A pop-up displays prompting confirmation from the Admin.
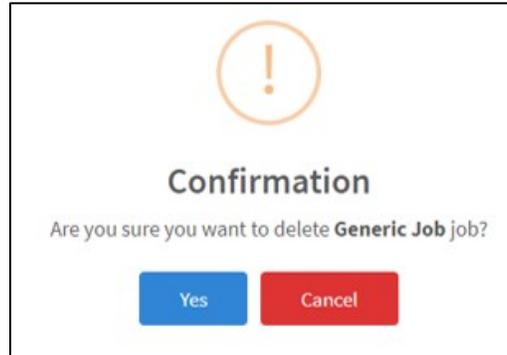

Figure 122: Delete Generic Job Pop-Up

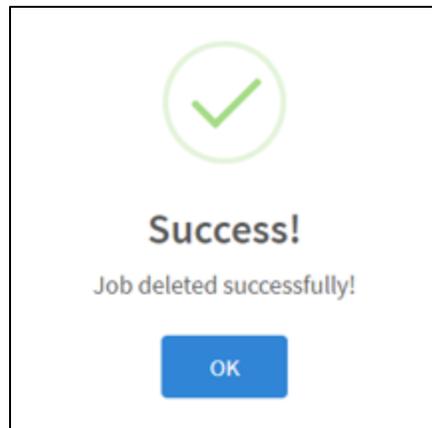Upon confirmation, a success pop-up displays informing that the job has been successfully deleted.

Figure 123: Job deleted! Pop-Up

16.2.4   User

Each user is enrolled into the system and assigned a role. Users are logged into the system to execute granted tasks within the role that has been assigned to them. Users can be sorted by clicking on the Filter by button. Columns can be filtered by selecting either a Role and/or Status from the drop-down list.
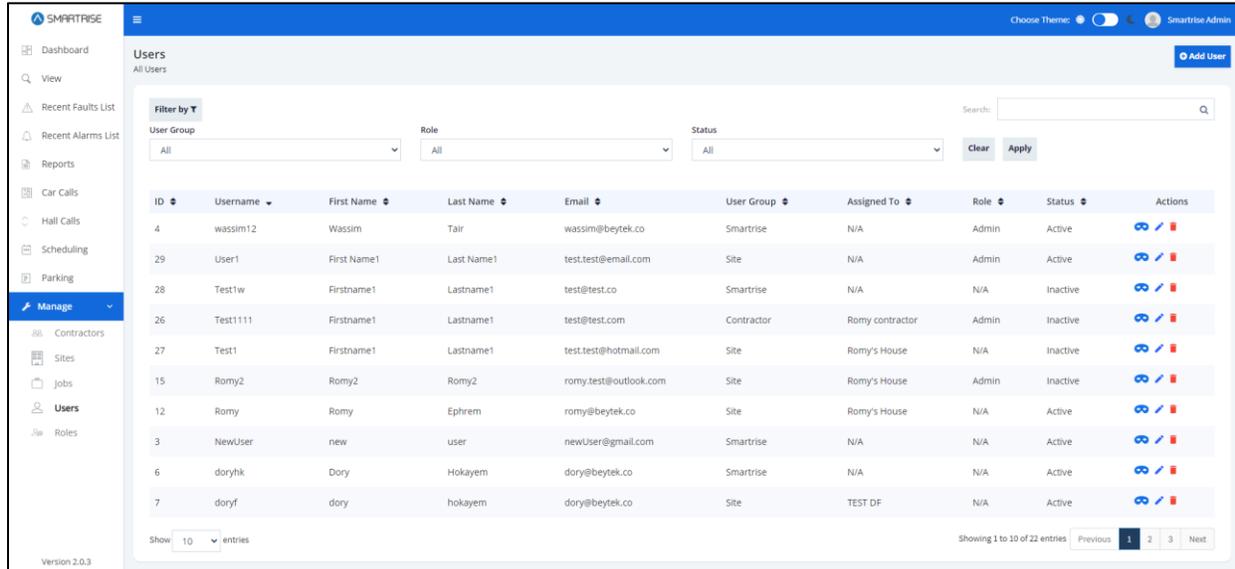

Figure 124: Manage User RM

16.2.4.1 Add User

To add a new user, click on the Add User button. The Add User screen is displayed, prompting for the new user's basic information

- First Name
- Last Name
- Email Address
- Contact Number
- User Group
- Contractor
- Site
- Status – Whether Active or Inactive (checkmark corresponds to Active)
- Username
- Password – Must consist of uppercase, number, special characters, and length criteria
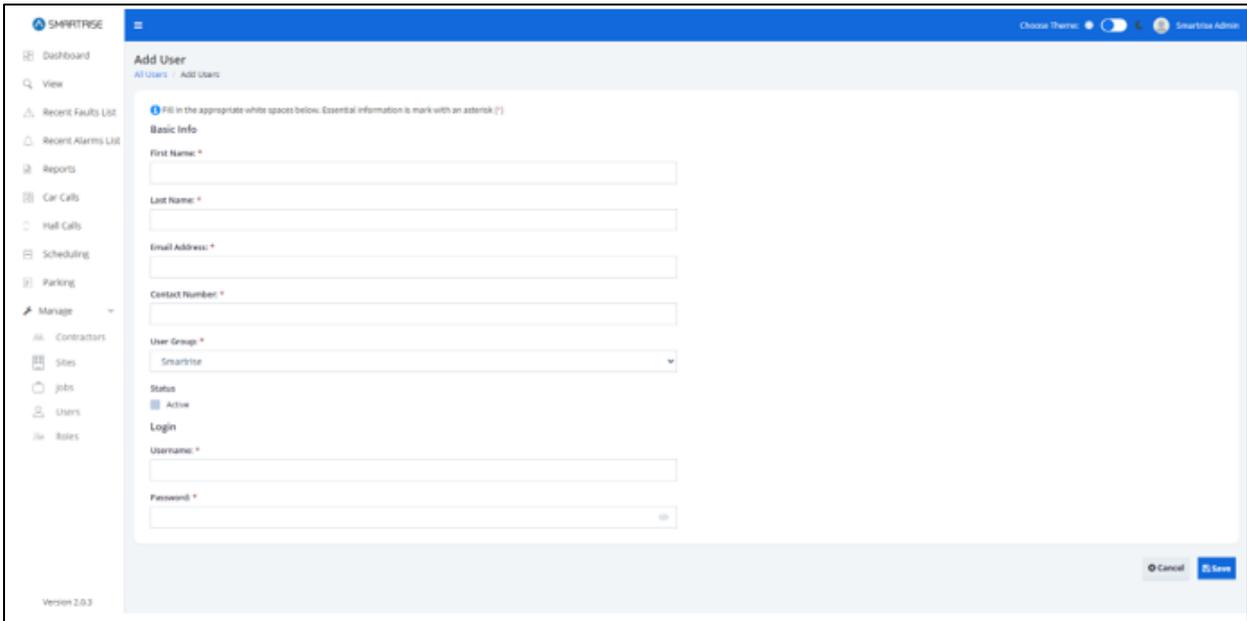

Figure 125: Add User-RM

When completed adding a new user, click on the Save button. If no information has been entered in a required field, a value is required message is displayed for that field.
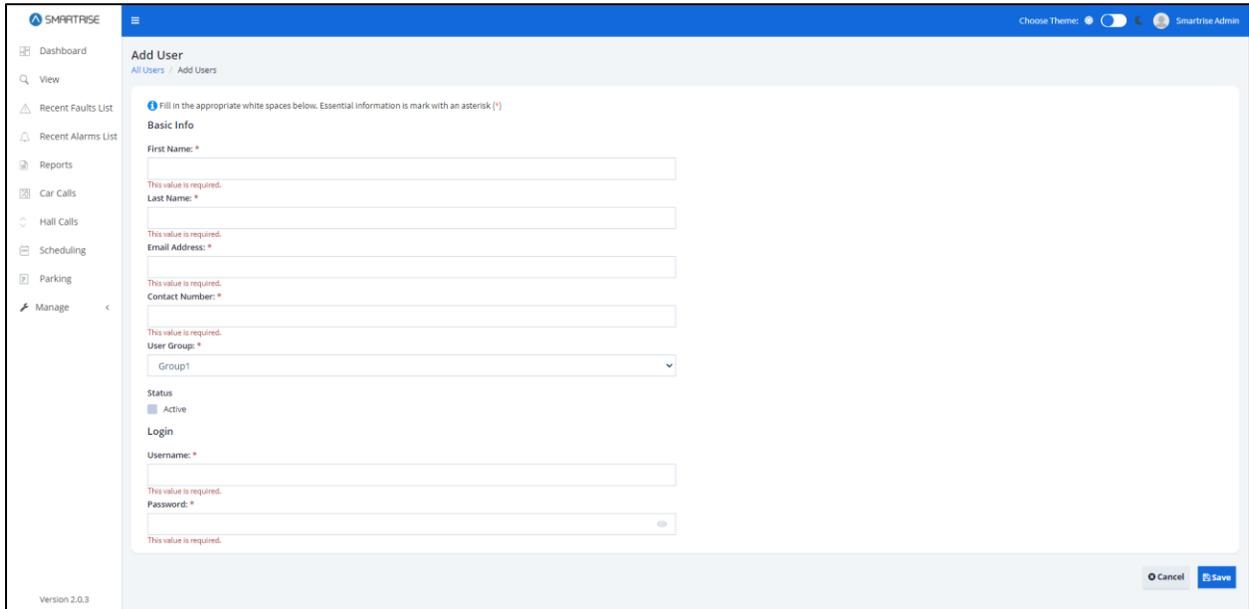

Figure 126: Add User – Value is Required Message

Upon successful submission, a pop-up displays informing a new user has been added successfully.
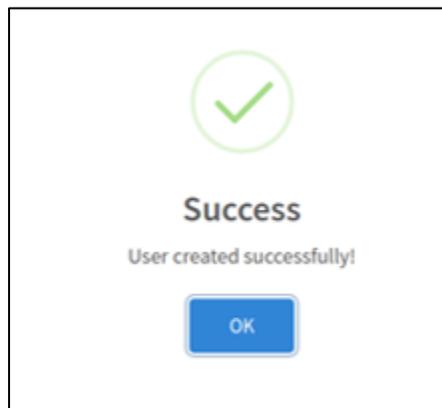

Figure 127: User created successfully! Pop-up

Roles and permissions must be assigned to the new user. To add roles and permissions, click OK from the successful pop-up. The Edit User screen displays.
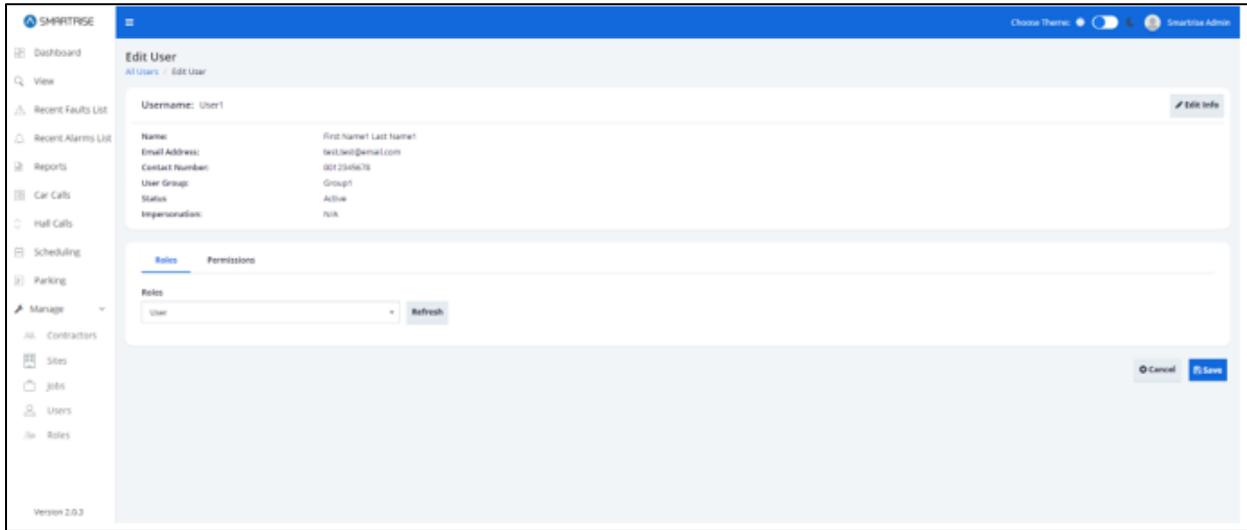

Figure 128: Edit User

16.2.4.2   Add Role

From the Role tab, click on the Roles drop-down list. Select a role and click Save.
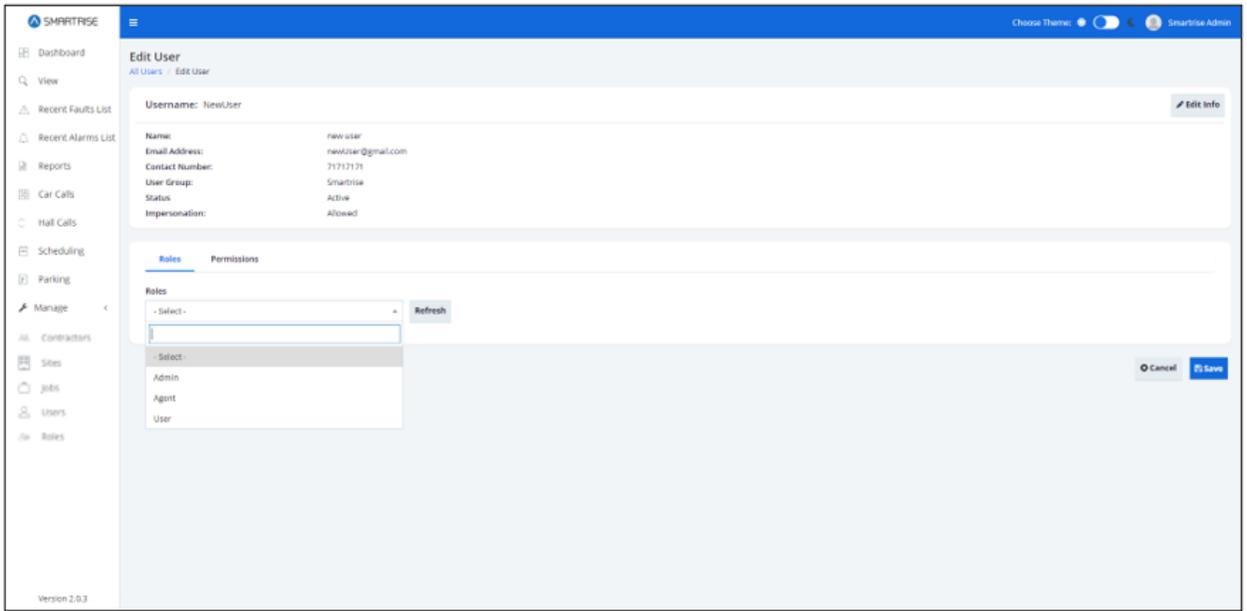

Figure 129: Edit User - Add Roles RM

When completed adding a role, click on the Save button. If no role has been selected, an Error pop-up is displayed.
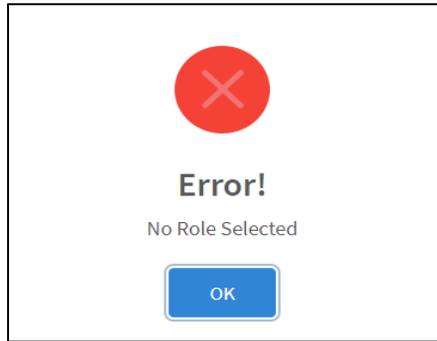

Figure 130: Error Pop-up

Upon successful submission, a pop-up displays informing a new role has been added successfully.
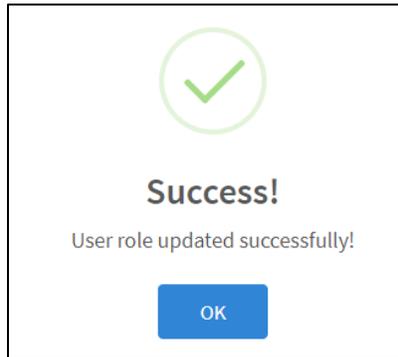

Figure 131: User role updated successfully! Pop-up

16.2.4.3   Add Permissions

From the Permissions tab, select the permissions required for the user to perform their tasks.
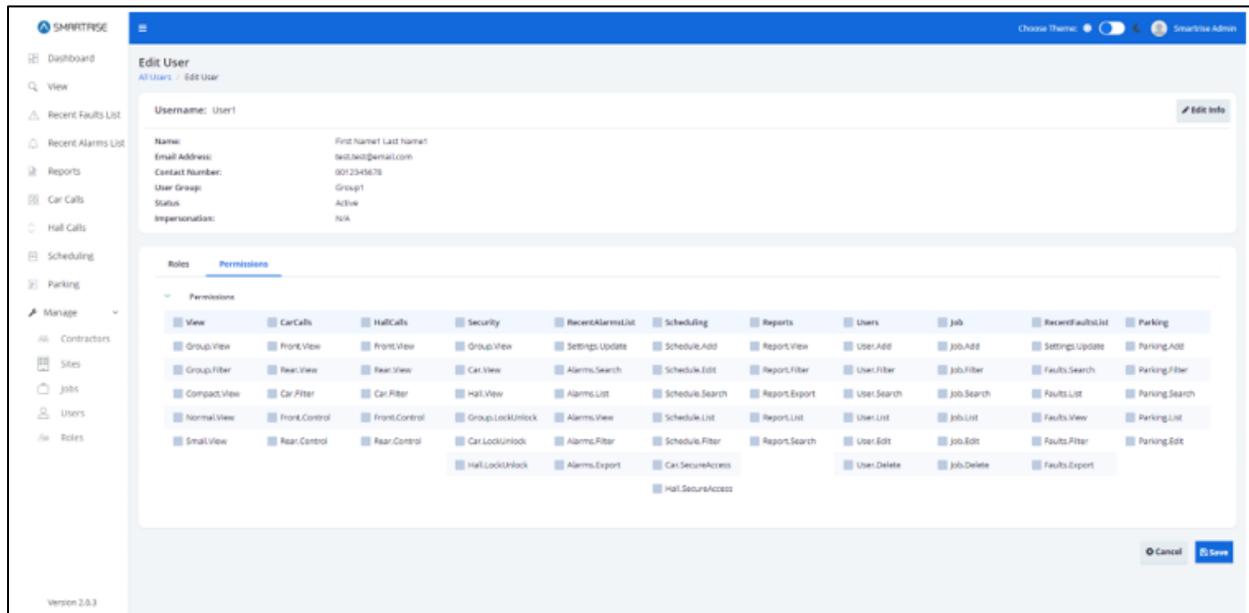

Figure 132: Edit User - Add Permissions

16.2.4.4   Edit User

User information can be updated when there is a change to the user's contact information and/or assigned roles and permissions.

There are two ways to edit user's information.

- From the Manage User screen – Click Edit under the Actions column
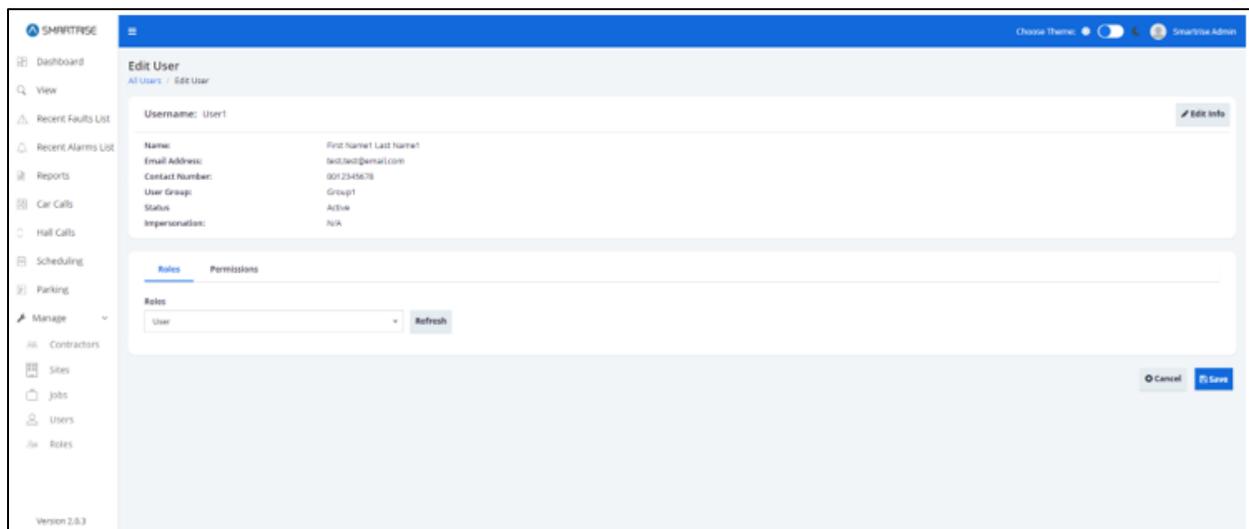- From the Edit User screen – Click on Edit Info button
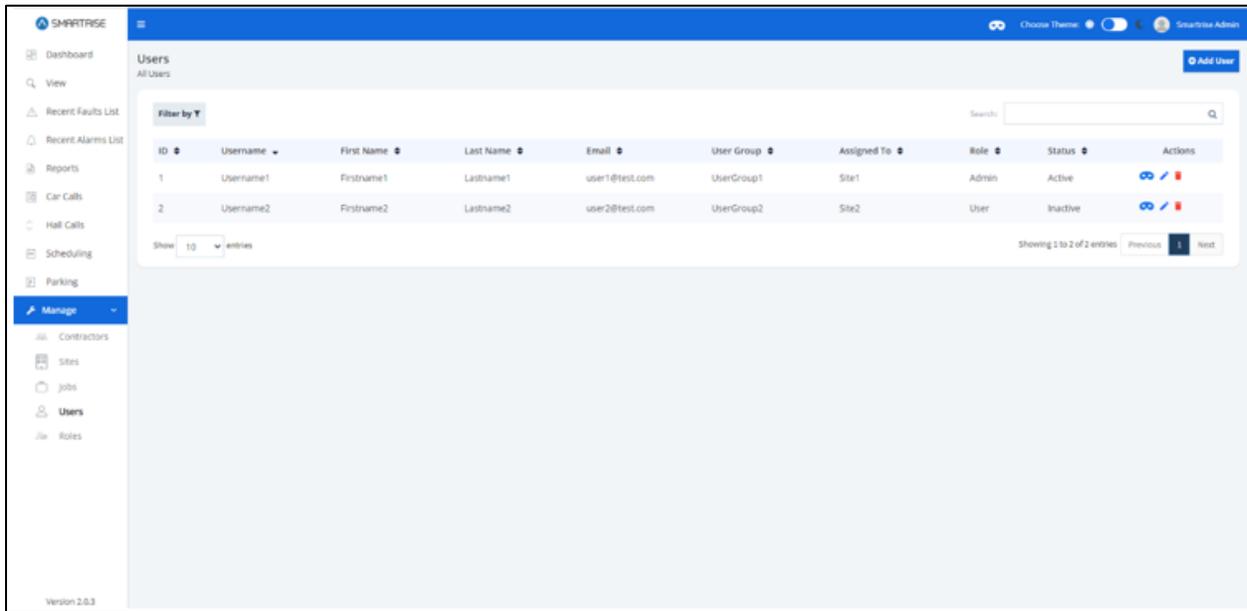

Figure 133: Edit User- Edit Info Button

Figure 134: Manage User- Edit User

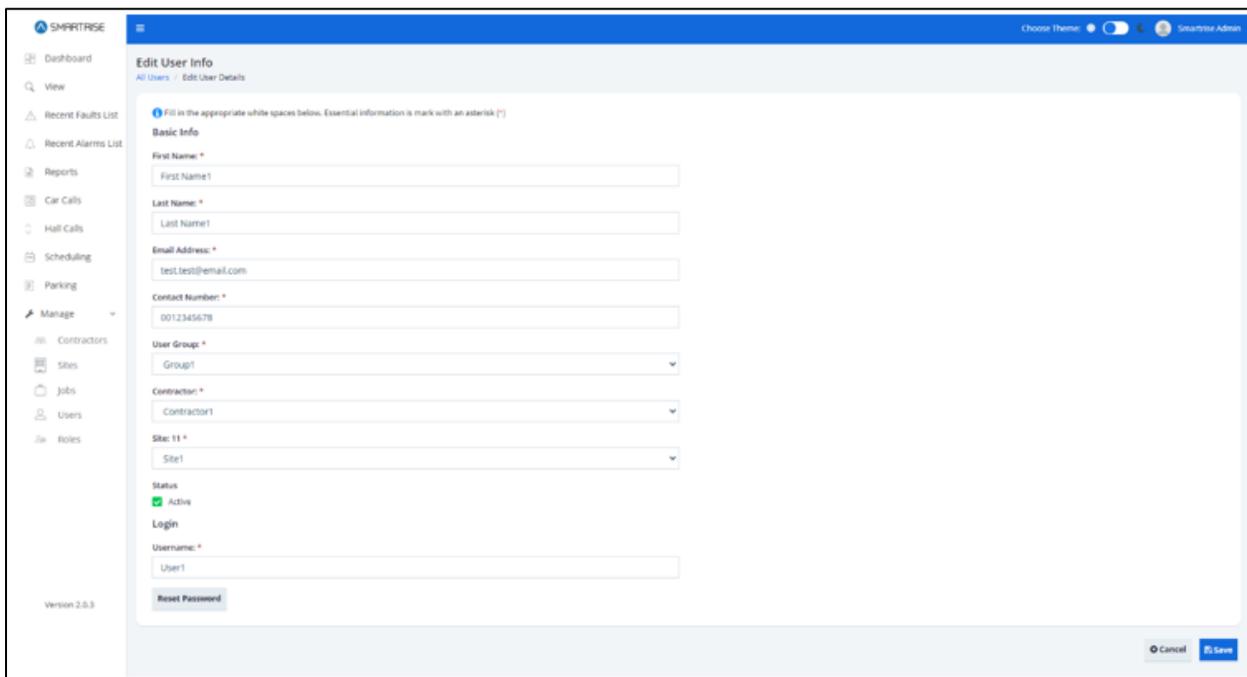From the Edit User Info screen, update the information and click Save.

Figure 135: Edit User Info RM

Upon completion, a pop-up displays informing the user information has been updated successfully.
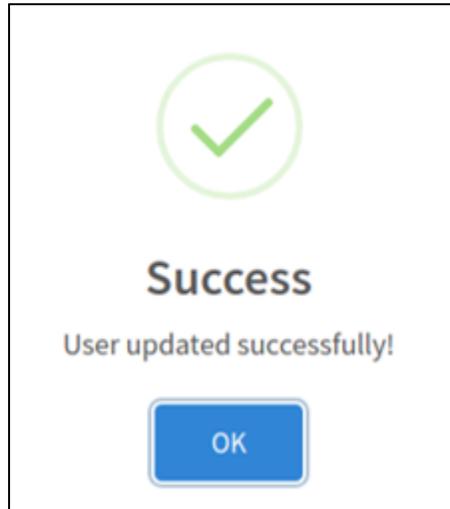

Figure 136: User updated successfully!

16.2.4.5   Delete User

A job can be deleted by clicking on the Delete Job button under the Actions column on the Manage User screen. A pop-up displays prompting confirmation from the Admin.
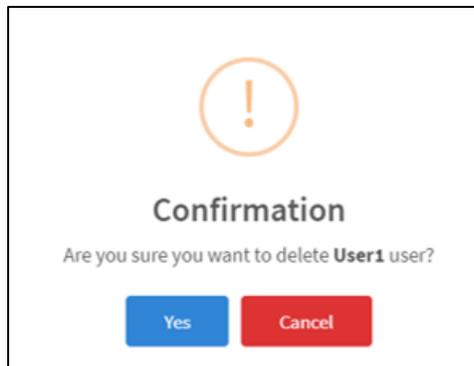

Figure 137: Delete User Pop-Up

Upon confirmation, a success pop-up displays informing that the user has been successfully deleted.
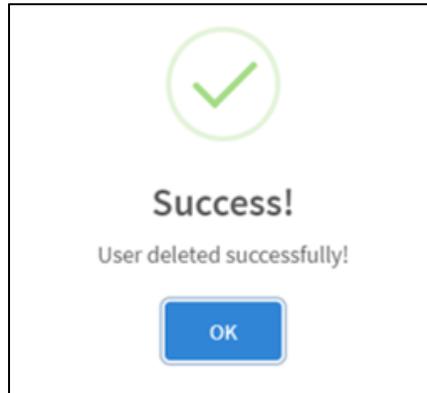

Figure 138: User deleted! Pop-Up

16.2.4.6 Impersonate User

User Impersonation allows administrators to access and operate the Remote Monitoring application as if they were logged in as that user. To impersonate or login as a certain user, click on the Impersonate Login button under the Actions column.
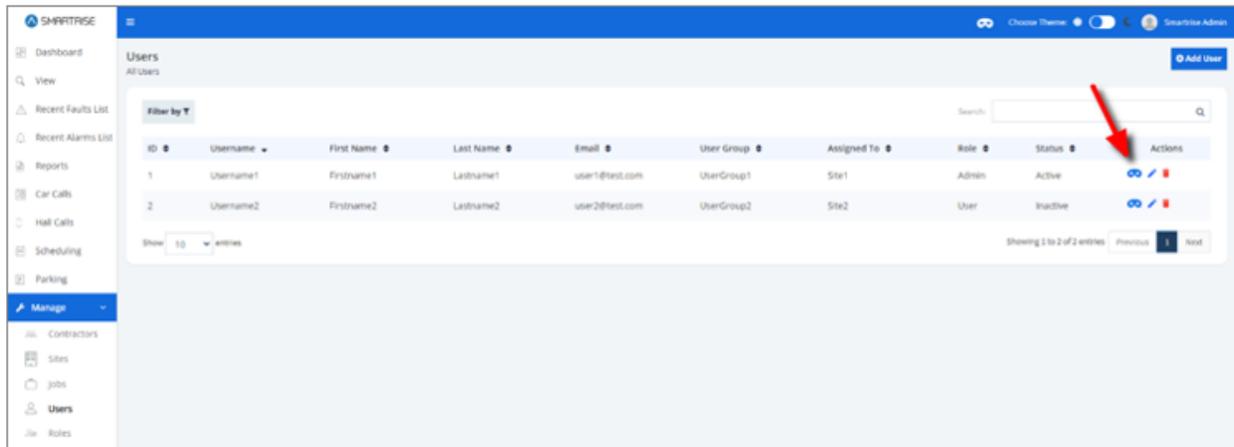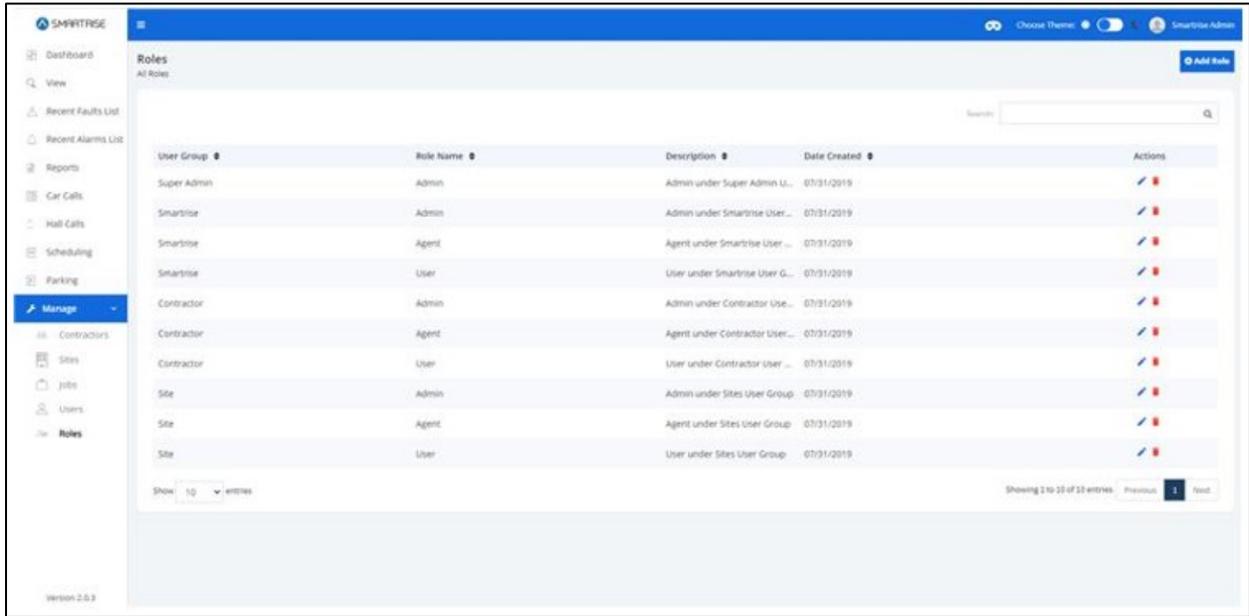

Figure 139: Manage Users – Impersonate User RM

16.2.5 Roles

The role defines the user's permissions within the system. It is the authorization given to users that enables them to access specific resources. User permissions also designate the type of access. Roles are assigned to grant users access to the functions required to execute a task. The pre-defined roles that can be assigned within the RM application are as follows:

- Super Admin
- Smartrise Admin
- Smartrise Agent
- Smartrise User

- Contractor Admin
- Contractor Agent
- Contractor User
- Site Admin
- Site Agent
- Site User

Figure 140: Manage Roles RM

16.2.5.1   Add Role

To add a new role, click on the Add Role button. The Add Role screen is displayed, prompting for the new user's basic information.

- Role Name
- Description – While optional, a short description of the role can be useful in conveying an idea of what the role entails.
- User Group – Belongs to either Smartrise, Contractor, or Site.

After the basic information has been entered, click on Permissions collapsible label to expand the list of permissions to select from. An authorized user selects the permissions with subtasks that are required for the role. For example, if the Site check box is selected, all its subtasks will be automatically selected.
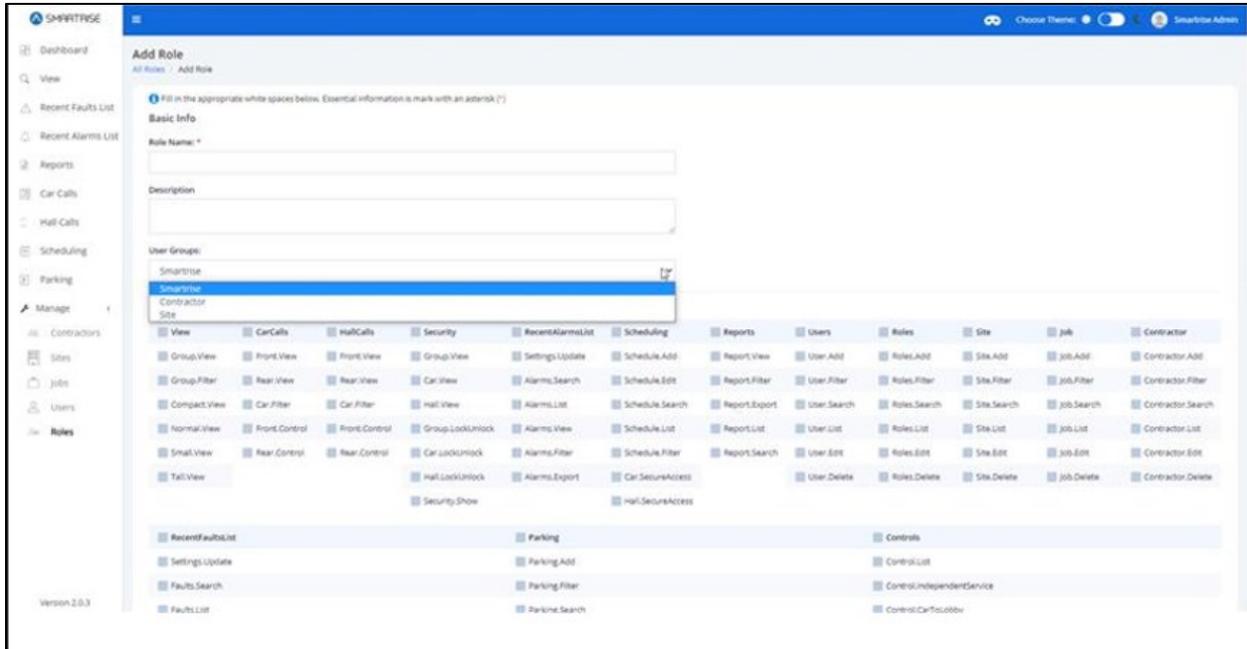

Figure 141: Add Role-RM

When completed adding roles and permissions, click on the Save button. If no permissions were selected, a Warning pop-up is displayed.
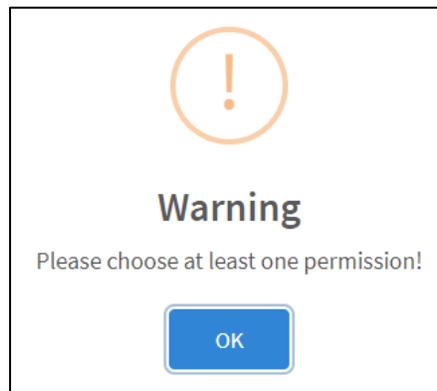

Figure 142: Warning Pop-Up

Upon successful submission, a pop-up displays informing a new role has been added successfully.
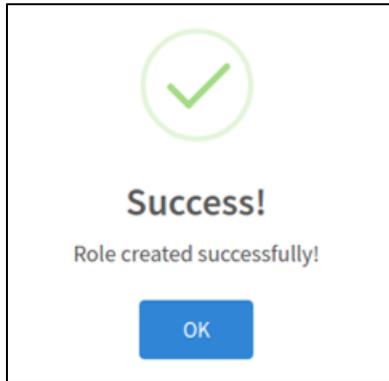

Figure 143: Role created successfully! Pop-up

16.2.5.2 Edit Role

A role can be edited to modify permissions or change the role description. To edit a role, from the Manage Roles screen, click on the Edit Role button under the Actions column.
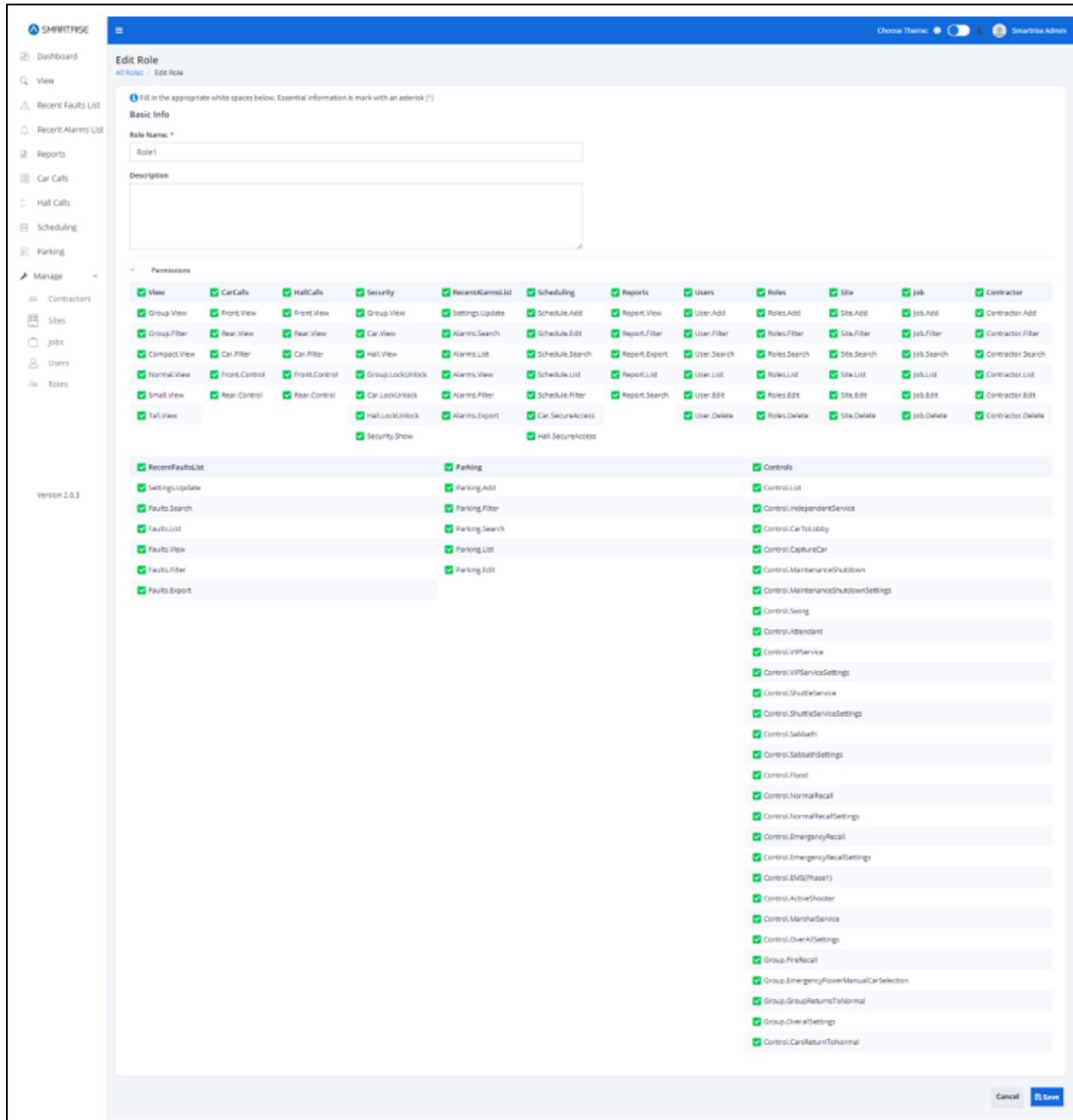

Figure 144: Edit Role RM

Upon completion, a pop-up displays informing the role has been updated successfully.
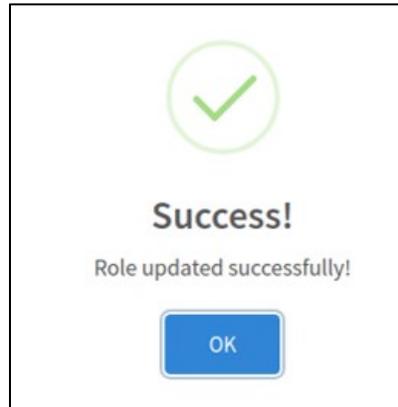

Figure 145: Role updated successfully!

16.2.5.3 Delete Role

An existing role can be deleted by clicking on the Delete Role button under the Actions column on the Manage Role screen. A pop-up displays prompting confirmation from the Admin.
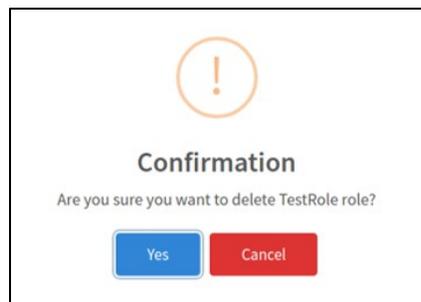

Figure 146: Delete Role Pop-Up

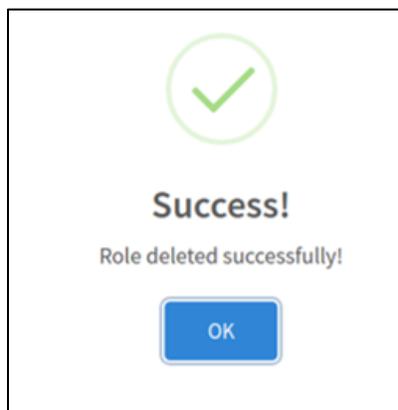Upon confirmation, a success pop-up displays informing that the role has been successfully deleted.

Figure 147: Role deleted successfully! Pop-Up