Set-up Manual
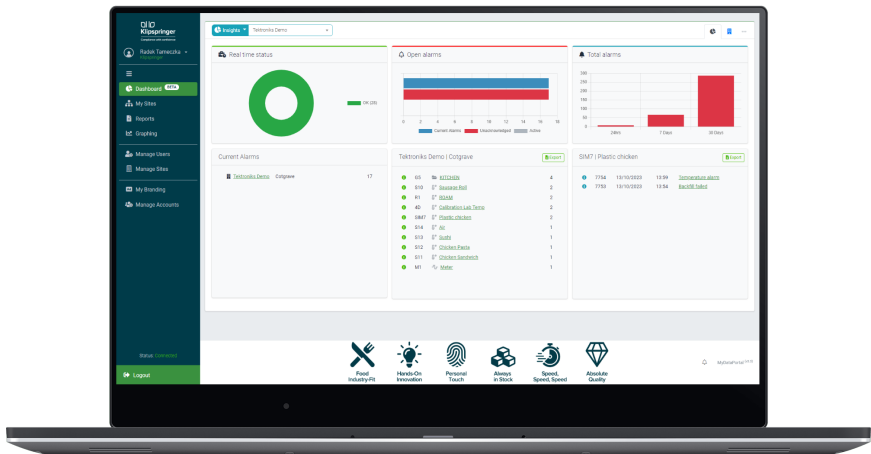
MyDataPortal

Product Code: LWXB-200

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Compliance with confidence

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MDP Overview

MDP allows users to connect to all variants of D3 base station systems from outside of the network to which it is connected. This means that by using MDP users have full access to their D3 from any device with a web browser from any location in the world (as long as they have internet access)!

Security Overview

MDP uses HTTPS connections encrypted with the latest cyphers, it is software hardened and acts as a reverse connection between the user's browser and the D3 on site. None of the systems stored data is held/recorded on MDP, it acts like a VPN to allow users direct system access.

The software hardening includes; only allowing get and post functions, meaning MDP is locked down and does not provide access outside of its direct connection, users cannot access the network connected to the D3 using MDP.

Note: The default D3 passcode WILL NOT work on MDP.

1.   Setting up the D3 to use MDP

Access to MDP is disabled by default within the D3 base station, to use MDP access must be enabled.

> Enabling Portal Access on a D3
> SITE => SETTINGS => NETWORKING => Portal Access
>
> Users with remote access rights can use "mydataportal.co.uk".
>
> Portal Access - Default = off, select enabled for portal access to be activated
> Site ID - This is unique to the D3 base station and is required to access via "mydataportal.co.uk"
> Connection Status - shows the current connection status of the base station with "mydataportal.co.uk"

2.   Accessing MDP

www.mydataportal.co.uk

There a two access levels available:

> Account Access – this is a paid for service which allows access to multiple D3's with various administration/ user levels. This is covered in further detail within this manual.
>
> Connect Direct – this is a free to use service, it allows users to access a single on-site system directly.

2.1.   Connect Direct

> Clicking the Connect Direct button opens the "Connect Direct To Remote Device" screen.
>
> User ID – this is the "User Name" for accessing the D3
> Password – this is the "Password" for accessing the D3
> Site ID – this is the site ID found on the D3's "Portal Access" page or the "Info Page"
>
> Once all 3 have been entered click "Connect", access will now be granted to the D3 as if connecting via the network connection.

Note:- If access fails ensure the User has portal access enabled within their system access rights.

2.2.   Account Access

> Only customers that have a MyDataPortal account can access MDP using this method.

Note; This is a paid for service. Refer to your system supplier for access costs.

This manual refers to systems with software versions of 6.0.0.0 and above only. Functionality will vary on a lower software version.

> Email – enter your accounts email address
> Password – enter your account password
> Select "Log In" to enter the MDP account
>
> *Each MDP account can have a number of sites assigned, these can be;*
>
> *Physical Site - this is a site with a D3 base station receiving data from sensors*
> *Virtual Site - this is a site made up with sensor information from a physical site or sites. Physical sites must be created prior to the creation of virtual sites*
> *Site Group - this allows sites to be grouped together, for instance if a number of sites make up a region these can be grouped in that region.*
>
> Section 3 below describes the process of adding physical sites to MDP - See section 3.3 for the creation of virtual sites, See Section 3.6 for the creation of site groups.

3.   Creating a Site

3.1.   Adding a New Site

> On first log-in for a new site the opening site screen asks the site account holder to create the first site, select "Add New Site" from the centre of the screen to go the Manage Site page to create the first site on the system
>
> a) - Manage Site page opens, select Add, select New Site
>
> b) - Add Site pop-up opens
>   i) - Name - a free text box for the site name as it will show on MDP (mandatory)
>   ii) - Location - a free text box for the location of the site to be detailed (mandatory)
>   iii) - Site Logo - a logo for the site can be added (optional)
>   iv) - Save Changes - creates the site and closes the pop up window
>
> c) - The new site will now appear in the Manage Sites Page, under Actions the Link Icon   will show orange and the status "Not Connected" in blue
>
> d) - The MDP sites need to be Linked to the physical D3 base station
>
> Complete steps a) to d) for all sites to be added to the MDP account (if more than 1)

3.2.   Link/Re-Link a Site

> a) - Select the link icon to open the Link Site Details to Remote D3 pop-up
>   i) - Name - Shows the name of the site to link/re-link
>   ii) - Key - this is the SITE KEY from the D3 Portal Access Page (mandatory)
>
> b) - Copy and enter the D3 Site Key
>   i) - on the network connection log directly in the D3 and follow the path -
> **D3 => SITE => SETTINGS => Portal Access**
>   ii) - on the Portal Access page select the copy icon for the Site Key
>   iii) - on MDP paste the site key in to the "Key" box in link pop-up
>   iv) - "Save Changes" will link the D3 to MDP, once connected the Link Icon will show green and the status will change to Connected in green.
>
> c) - a site can be Re-Linked following steps a) & b) above.

3.3.   Adding and Editing a Virtual Site

Virtual sites are made up from a sensor (or groups of sensors) from a site or a number of sites. The information for the virtual site is displayed on MDP only, virtual sites cannot be accessed via the a direct connection to a D3 base station.

Note - virtual sites can only be created from physical sites, therefore all physical sites need to be added before attempting to create virtual sites using their sensors.

3.3.1.   Adding a virtual site

a) - on the Manage Site page, select Add, select Virtual Site

b) - Add Virtual Site pop-up opens
   i) - Name - a free text box for the virtual site name as it will show on MDP (mandatory)
   ii) - Location - a free text box for a location description to be added (mandatory)
   iii) - Site Logo - a logo for the site can be added (optional)
   iv) - Save Changes - creates the site and closes the pop up window

3.3.2.   Editing a virtual sites details

a) - open the "Site Details" page by selecting the Site Name in Orange or the View Site Details icon from the "Manage Site" page.

b) - in the "Manage Virtual Site Details" pane select the Edit icon, the Edit Site Details pop-up opens
   i) - Name - a free text box for the virtual site name as it will show on MDP (mandatory)
   ii) - Location - a free text box for a location description to be added (mandatory)
   iii) - Site Logo - a logo for the site can be added (optional)
   iv) - Save Changes - updates the site and closes the pop up window

3.3.3.   Adding sensors to a virtual site

a) - open the "Site Details" page by selecting the Site Name in Orange or the View Site Details icon from the "Manage Site" page.

b) - in the "Sensors in Virtual Site" pane, select Add Sensor, the Sensor Picker pop-up will open
   i) - Select Site - selecting opens a drop down box with all added physical sites available
   ii) - selecting a site will bring up the list of available sensors to add to the virtual site
   iii) - selecting Add at the end of the available sensor details will add the sensor to the virtual site and return to the Site Details view

c) - complete step b) for all sensors to be added to the virtual site

3.3.4.   Deleting sensors from a virtual site

a) - open the "Site Details" page by selecting the Site Name in Orange or the View Site Details icon from the "Manage Site" page.

b) - in the "Sensors in Virtual Site" pane, select "Remove Users Access" icon under Actions, the sensor will be removed.

Removing a sensor from a virtual site does not affect the sensor or data on the physical site or D3 base station.

3.4.   Adding and Editing Site Plan/Plans

All physical sites can have a site plan/plans added, these are not mandatory and are not system requirements.

Plans can be in a JPG or DNG format, once uploaded the sensor information can be dragged and dropped to the relevant location on the plan.

A site can have multiple plans added, e.g. an "Overview" plan for the whole site could be added, then each department/area could have a detailed plan.

3.4.1.   Adding a site plan

a) - open the "Site Details" page by selecting the Site Name in Orange or the View Site Details icon from the "Manage Site" page.

b) - select Add Plan, the Add Plan pop-up will open.
   i) - Name - this is the name for the plan which will be seen in the plan view for the site (Mandatory)
   ii) - Is Default View - if selected this plan will be the default plan visible in the plan view for the site, other plans added for the site will sit below this view in the site plan hierarchy.

c) - select Browse to navigate to the JPG/DNG plan to be added.

d) - Save Changes to add this plan to the system.

e) - the "Edit Plan Layout" page will open.

3.4.2.   Editing a site plan layout

When "adding a new site plan" the edit layout page will automatically open.

When editing an existing plan layout, select the floor plan by its name (in orange) to open the edit layout page.

The uploaded plan will show on the left pane, the sensors for the site will appear in the right pane.

a) - select the sensor to add - hover the cursor over the sensor to add, the selection cross will appear, left click and hold down the button and drag the sensor information to the desired location on the plan. Once in the desired location release the left button to locate the sensor information.

b) - the sensor details show in green in the right pane as an indication that the sensor has been used.

Note, a sensor can be used on more than 1 plan view, the colour change indicates that a sensor has been used (and highlights any sensors that have not been used).

c) - once all desired sensors have been added to the plan select "Save Changes" to save the plan, select "Back" to return to the Site Details Page.

Complete the editing for each plan that has been added for the site.

3.4.3.   Editing a site plans details

This allows the plan name, default status or for the site plan to be deleted and replaced with an updated version.

Note, if you edit and save the site plan when editing the site details the sensors locations will need to be re-added, see Section 3.3.2 Editing a site plan layout for adding sensor to a plan.

a) - open the "Site Details" page by selecting the Site Name in Orange or the View Site Details icon from the "Manage Site" page.

b) - in the "Plans" pane, select the "Edit Plan Details" icon under Actions, the Edit Plan pop-up will open.
   i) - Name - the site name can be edited.
   ii) - Is Default View? - can be edited.
   iii) - Site Plan - can be deleted and a new plan can be added via the "Browse" selection.

c) - Save Changes will save the updated details, to cancel select the cross or select the back button.

3.4.4. Deleting a site plan

If not required a site plan can be deleted from the site view, to delete a plan;

a) - open the "Site Details" page by selecting the Site Name in Orange or the View Site Details icon from the "Manage Site" page.

b) - in the "Plans" pane, select the "Delete Plan Details" icon under Actions, the Delete Site Plan pop-up will open.

c) - select Delete to remove the plan, remember this cannot be undone once completed.

Note - deleting a site plan does not affect any data or other settings on MDP or the base station.

3.5. Adding and Editing a Site Group

Site groups are made up of sites already created on MDP, these can be physical sites only.

3.5.1. Adding a Site Group

a) - on the Manage Site page, select Add, select Site Group.

b) - Add Site Group pop-up opens.
 i) - Name - a free text box for the site group name as it will show on MDP (mandatory).
 ii) - Location - a free text box for a location description to be added (mandatory).
 iii) - Site Logo - a logo for the site can be added (optional).
 iv) - Save Changes - creates the site and closes the pop up window.

3.5.2. Editing the Site Group details

a) - open the "Site Details" page by selecting the Site Name in Orange or the View Site Details icon from the "Manage Site" page.

b) - in the "Manage Virtual Site Details" pane select the Edit icon, the Edit Site Details pop-up opens.
 i) - Name - a free text box for the site group name as it will show on MDP (mandatory).
 ii) - Location - a free text box for a location description to be added (mandatory).
 iii) - Site Logo - a logo for the site can be added (optional).
 iv) - Save Changes - updates the site and closes the pop up window.

3.5.3. Adding site to a site group

a) - open the "Site Details" page by selecting the Site Name in Orange or the View Site Details icon from the "Manage Site" page.

b) - in the "Sites in Group" pane, select Add Site, the Site Picker pop-up will open
 i) - selecting Add at the end of the available site details will add the site to the group and return to the Site Details view.

c) - complete step b) for all sites to be added to the site group.

3.5.4. Deleting sites from a site group

a) - open the "Site Details" page by selecting the Site Name in Orange or the View Site Details icon from the "Manage Site" page.

b) - in the "Sensor in Site" pane, select "Remove Site from Group" icon under Actions, the site will be removed.

Removing a site from a group does not affect the MDP site or data on the D3 base station.

3.6. Adding & Editing User Access to a Site/Site Group

Adding user access to a site, virtual site and site groups is an identical process.

Note - Users must be created on the system before they can be given access to sites or site groups, see Section 4 User Management for adding and editing site users.

3.6.1. Adding site users

a) - open the "Site Details" page by selecting the Site Name in Orange or the View Site Details icon from the "Manage Site" page.

b) - in the "User Access" pane select Add Users, the User Picker pop-up opens
 i) - selecting Add at the end of the available user details will add the user to the site and return to the Site Details view.

3.6.2. Deleting site users

a) - open the "Site Details" page by selecting the Site Name in Orange or the View Site Details icon from the "Manage Site" page.

b) - in the "User Access" pane, select "Remove Users Access" icon under Actions, the users site access will be removed. The user will no longer have access to the site in either the Dashboard or My Sites tabs, see the User Manual for more information on using MDP.

4. Manage Users

MDP users will have access to view data on MDP but do not have the ability to access or amend details on the D3 base stations the MDP account has access too.

Each MDP user should have a unique user account, accounts should not be shared.

A users email can only be associated with one MDP account.

If an MDP users is also a user on a D3 base station they can connect directly to the D3 using the connect direct functionality built in to MDP, this is done by the user adding their D3 base station site credentials for each site they are given access to through MDP. See **Section 4.2 Adding Site Credentials** for instructions on how this access is granted.

MDP has 3 users levels, these are;

Account Manager - this is the initial user created for MDP and who holds the MDP account. The account management function has the ability to manage sites and users.
Administrator - has the ability to manage sites and users.
User - can view sites information only.

4.1. Adding and Editing User Details

4.1.1. Adding a MDP user

a) - In the "Add/Manage Users" page select Add New User, the "Add User Details" page will open.
 i) - Forename of user to be added (mandatory).
 ii) - Surname of the user to be added (mandatory).
 iii) - Position within organisation.
 iv) - Email address - this will be used for the user to verify their access and create their password details (mandatory).
 v) - Access Level - select from the drop down box the access level for the user.

b) - Save Changes generates the user and a confirmation email is sent.

4.1.2.   Resending a confirmation email

a) - In the "Add/Manage Users" page select "Resend Confirmation Email" icon that appear before the users name.
 i) - the re-confirmation email can also be sent when editing a users details.

Note - once a user confirms their email details the re-confirmation email cannot be resent.

4.1.3.   Editing a users details, change access level or add/delete user site access

a) - In the "Add/Manage Users" page select either the "View Users Details" icon under Actions or select the users name shown in orange, the view View Users Details page will open.
 i) - in the "User Details" pane, select Edit to edit the users details and access level.

b) - site access can also be added or deleted for the "Add/Manage Users" page. See **Section 3.6 Adding & Editing Users Site Access.**

4.2.   Adding Site Credentials (to allow direct access to a D3)

Once a site has been added it will appear in the users "Dashboard" and "My Sites".

To have the ability to directly connect to the site the user must enter their "Username & Password" normally used to access the D3. Each MDP user with a direct D3 account will need to input their individual D3 user-name and password to create this direct link.

Note - Remember, to access a D3 from MDP the user MUST be registered on the D3 and have portal access enabled in their user rights. If a user is not registered on the D3 or does not have the correct user rights they cannot get direct access to the D3 through MDP.

4.2.1.   Adding site credentials in the My Sites Overview page

My Sites "Card" Overview
 In card overview each site will have its own tab showing the site details, in the top right hand corner of each tab are 3 dots. Selecting the 3 dots will give the options;
 a) - Site Credentials - select and the "Edit Site Details" pop-up will open.
  i) Device Username - the users D3 access username, not the username for MDP (mandatory).
  ii) Device Password - the users D3 access password, again not the MDP password (mandatory).
  iii) Save Changes will save the access details, if the details are entered incorrectly a warning will show, only the correct details can be successfully entered.

 b) - Remote Connect - selecting will open a direct connection to the D3 on site in a new window.
  If the users D3 site credentials are not entered this connection cannot be selected.

My Sites "List" Overview
 In list overview each site will show in a list format in alphabetical order, selecting the "Edit Connection Details" icon under Actions will;
 a) - open the"Edit Site Details" pop-up.
  i) Device Username - the users D3 access username, not the username for MDP (mandatory).
  ii) Device Password - the users D3 access password, again not the MDP password (mandatory).
  iii) Save Changes will save the access details, if the details are entered incorrectly a warning will show, only the correct details can be successfully entered.

Select "Remove" for each of the sites to be removed from a user account.

Once completed close dialogue box.

Note: removing user access from MDP will not affect the users direct site access to the D3.