



IoT Portal

Customer User Guide



The Telesystem IoT customer portal is a highly customizable console that allows you to personalize the information and data your IoT solution provides. This guide will highlight some of the most common portal questions regarding creating and customizing Alerts/Reports/Dashboards. A link to the IoT Help page is included at the end of each section with additional resources for more in-depth information.

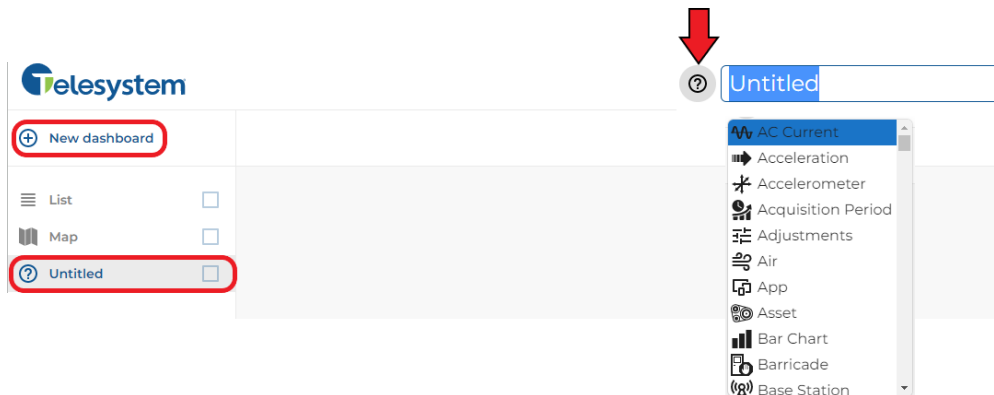
Navigate to <https://telesystem.mydevices.com/home> to access the IoT Customer Portal.

Custom Dashboards

Custom dashboards allow you to create a fully customized view of your devices and data. You get to control which devices are included, which data is displayed and even how the data gets displayed. Later after setting things up the way you want, you can even share your view with others.

Create New Dashboard

1. On the main portal screen, click the **New Dashboard** icon on the left side menu.
2. Click on the newly created **Untitled** dashboard.
3. In the upper title section, select the **Icon** and **Title** you would like to use to represent this dashboard in the left menu.

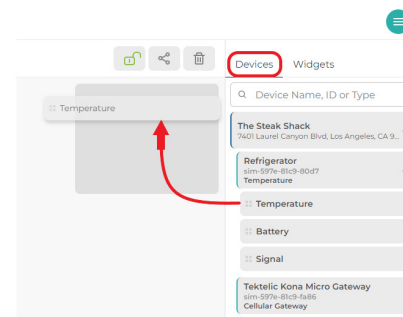


Adding Device Widgets

1. Click the **+** on the lower right side of the dashboard screen to add new widgets.
2. Select either Devices or Widgets on the right menu to add a new widget to the dashboard.

a. Devices menu

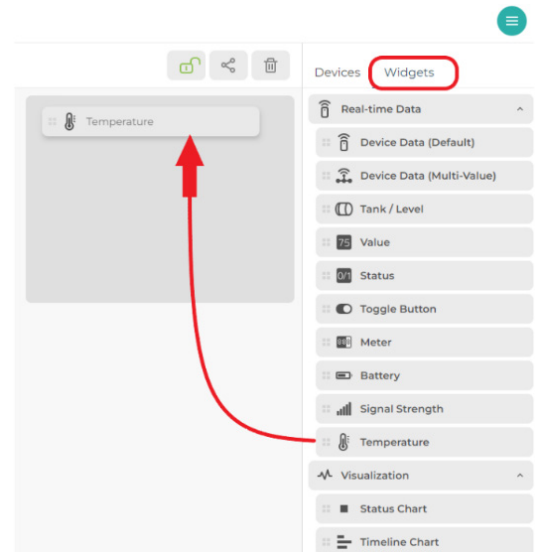
- i. This menu will list all the sensors currently installed at your location
- ii. Expand the selection next to the sensor you want to add
- iii. Drag and drop the parameter you want monitored for that specific sensor





b. Widgets menu

- i. This menu will display a list of customizable widgets
- ii. Select the widget based the type of data you want view or the visual style you want the data represented in
- iii. Drag and drop the specific widget onto the dashboard screen



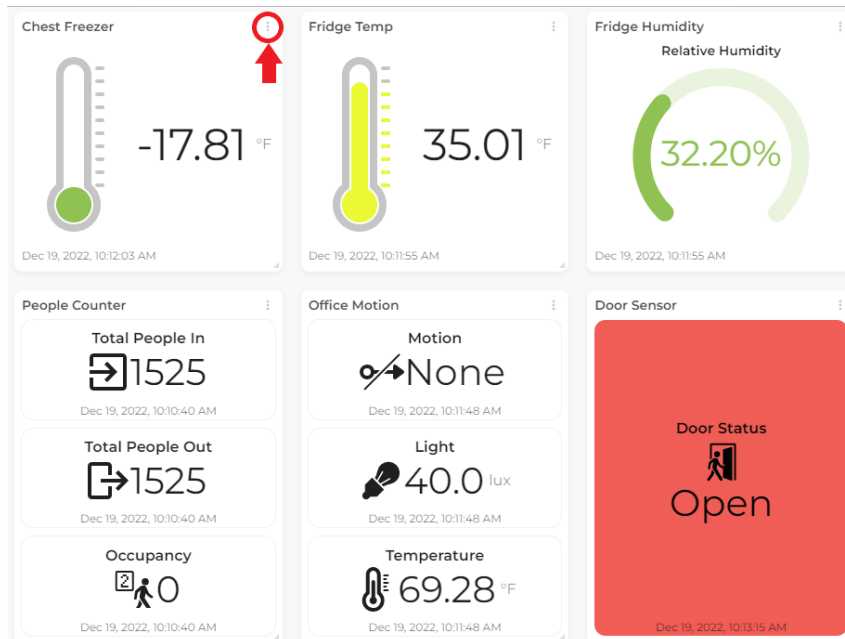
c. Enter the Widget Settings information for each widget added

- i. General - Add a name to identify each individual widget
- ii. Location - Choose the specific site location where the sensor is located
- iii. Device - Choose the specific sensor you are looking to monitor
- iv. Decimal - Number of decimal spaces you want reading to display

Customize Dashboard Widgets

Once widgets have been added to the dashboard, display settings can be customized.

1. Click the stacked dots icon in the upper right corner of the widget you want to edit.
2. These menus will allow you to customize the widget display in a variety of graphical options.
3. Sensor reading thresholds can be selected to graphically represent the status.



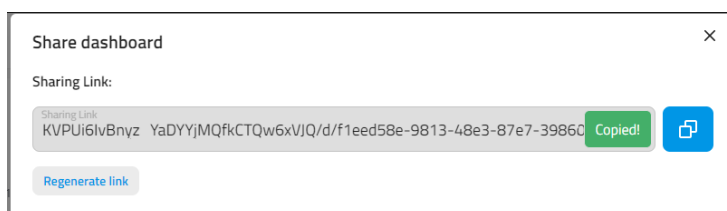
How to Share Custom Dashboard with Others

After setting up your custom dashboard, you can share it with others so that they can see your customized view.

1. Open the custom dashboard that you want to share with someone else.
2. Select the Share dashboard link.



3. Copy the link to your clipboard.



4. Send the dashboard link out to others.
 - Your dashboard will be visible to remote viewers by following the shared URL.



- Sharing custom dashboard views in this manner is read-only; viewers will not be able to make any changes.
- As new data points come in, all viewers will see the latest information displayed.
- You can delete the custom dashboard to stop sharing at any time.

Follow this link for more information on custom dashboards <https://iot-help.scrollhelp.site/iotkb/custom-dashboards>

Alerts

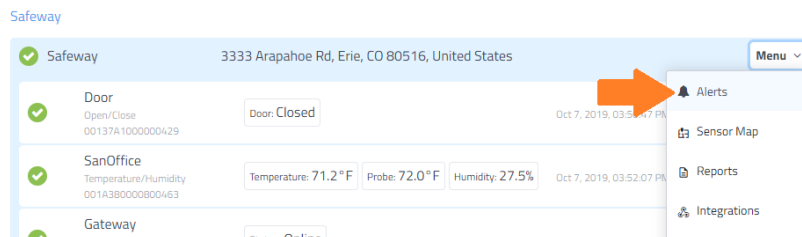
Alerts allow you to receive notifications when hardware readings deviate from normal. You can choose which alerts to receive and customize each – you control the conditions for alerting, who gets notified, and during which hours someone is to be notified (such as working hours and after-hours contacts). Recipients can be notified by Text or Email message.

Create New Alerts

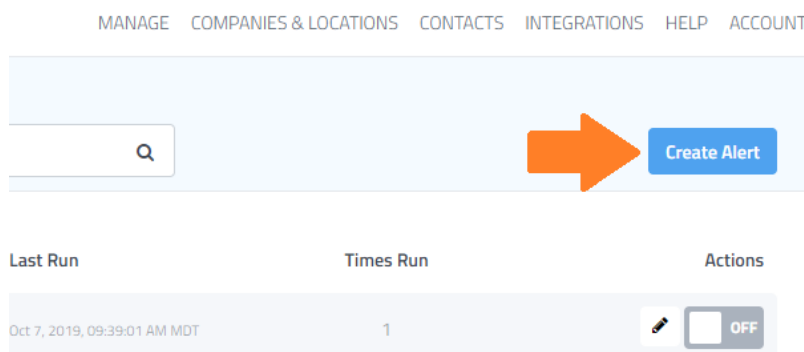
Once widgets have been added to the dashboard, display settings can be customized.

You can create new alerts from the **Alerts** screen. You can have as many alerts as you want, each with their own options.

1. Expand the Location menu and select **Alerts**.



2. Click on **Create Alert** to start creating a new Alert.





- Click on **Device** and a list of devices at this location will be displayed. Select which device will be used in the alert.

Create Alert

Device ▼

Alert Type

Door (00137A1000000429) - Open/Close

Gateway (eui-00001c497bcc70e8)

SanOffice (001A380000800463) - Temperature/Humidity

Device

- Select Temperature or Humidity for the **Alert Type**. (You may also be able to select "Probe" if your sensor has a probe attached).

Create Alert

DEVICE
SanOffice (001A380000800463) - Temperature... ▼

Alert Type ▼

Alert Name

Battery

Humidity

Probe

Signal

Temperature

Alert Type

💡 The alert types you see will depend upon the type of device selected in step 2.

➔ After selecting the **Device** and **Alert Type**, additional options will appear on screen.

- Enter an **Alert Name**.

💡 The app will automatically create an appropriate default name for your new alert. You can choose to accept the default name or customize it.

- Customize the **Conditions** for the alert. These thresholds determine when the alert will trigger.

Conditions

Threshold above: 60 °F

Threshold below: 40 °F

Reading(s) in a row before alert is sent: 1



💡 The app will choose appropriate defaults based upon the type of alert being created. Adjust values based on your policy.

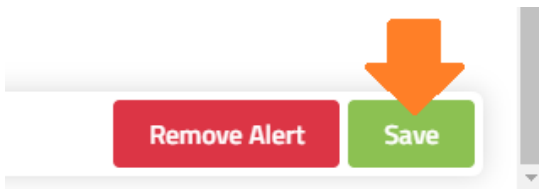
7. **OPTIONAL:** Add a **Rule**. Rules allow you to define additional options or exceptions that should be taken into account.

💡 For more information on adding rules check out How can I control the number of alerts that I receive?

8. Customize the recipients who will be notified when this alert occurs.

💡 You can notify as many contacts as you want, each with their own notification options. Add to the list of recipients by clicking on **Add Recipient**. Select either to alert the user via **Email** or **SMS Text**.

9. Click on **Save** Alert to complete the alert.



➔ After adding your new alert, you see confirmation that the alert was created and you will be returned to the Alerts screen where you will see your new alert shown.

Alerts						Create Alert
Search						Q
Status	Name	Type	Last Run	Times Run	Actions	
✓ Normal	Gateway Online/Offline Alert	Online/Offline	Oct 7, 2019, 09:39:01 AM MDT	1	✎	ON
✓ Normal	SanOffice Temperature Alert	Temperature	-	0	✎	ON
✓ Normal	Door Open Alert	Open	Oct 7, 2019, 03:50:53 PM MDT	1	✎	ON

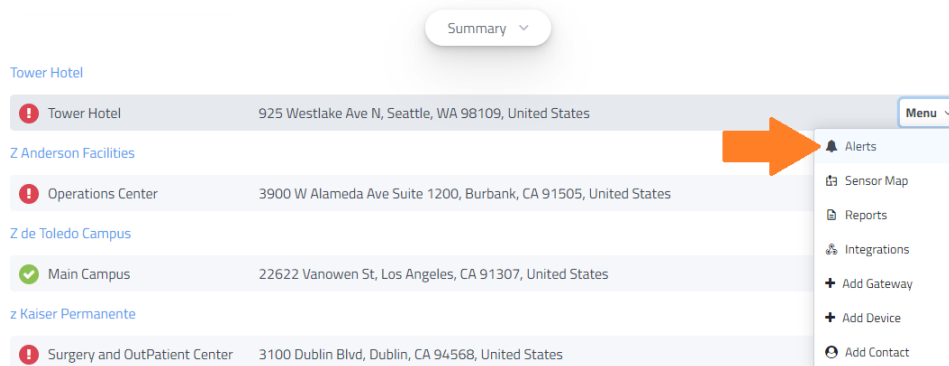


Edit Alerts

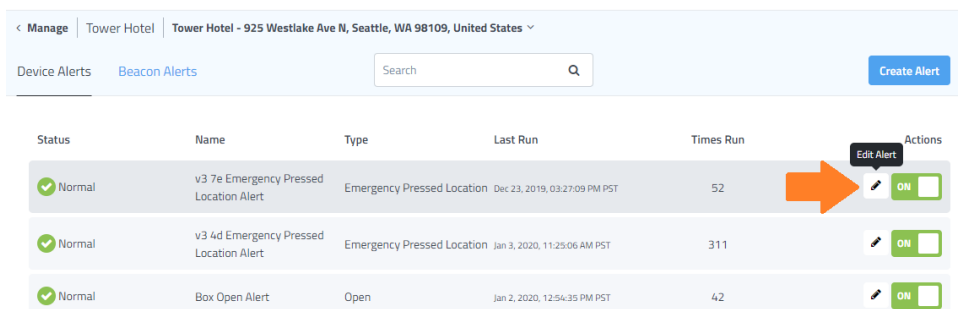
Once widgets have been added to the dashboard, display settings can be customized.

You can access Alerts from the **Alerts** screen for each location. The Alerts screen allows you to make common adjustments to existing alerts.

1. To access alert settings, find the location for which you want to change the alert, expand the menu and select **Alerts** from the list of options displayed.



2. After opening the Alerts, locate the alert you want to edit and select the **Edit** Alert button to open its settings.



3. From the Edit Alert screen, you can then adjust the various settings for the alert.

Examples of Alert common tasks:

- **Adjust the thresholds or add Rules** for when alert notifications are sent.
- **Add or remove Recipients** who will receive notification when alerts are triggered.
- Tip: If you have lots of alerts to change, you can use the **Apply to Other Devices** feature which makes bulk changes easier.

Follow this link for more information on Alerts <https://iot-help.scrollhelp.site/iotkb/alerts>



Reports

Reports allow you to receive automatic Daily, Weekly or Monthly reports that include summary and details based upon the report type selected. Create as many reports as needed, each with their own recipients and delivery options. A history of past reports is also available for download at any time.

Here is an overview of some of report types you will find.

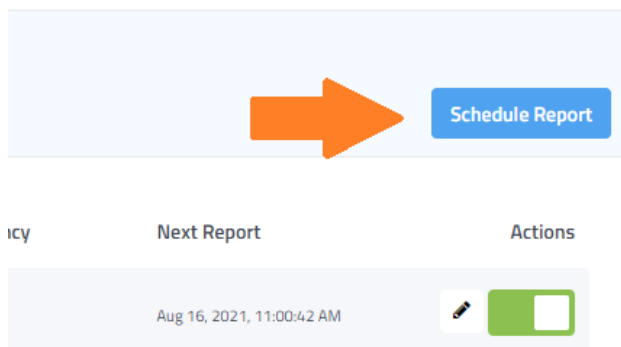
- The **Summary report** will provide complete details for your devices, all readings and data charts will be provided for the specified report times. This type of report can serve if you need a summary of data for your devices to store for record keeping.
- The **Regulatory report** is designed to mimic paper logs whereby users record data at specific times throughout the day and approve whether the sensor is in range or out of range. This type of report is where you would look if you were interested in a view of devices that were out of normal range.
- **Corrective Actions** contains a rollup of Alerts that result in actions taken in the dashboard UI. The actions selected in response to the Alert along with whatever notes were recorded are included in the report.
- **Predictive Maintenance** is a report specific to those types of sensors - with it you can receive a summary showing the status of preventative maintenance sensors which use vibration and artificial intelligence technology to help determine when a system needs to be repaired or replaced before an eventual breakdown.

Create New Report

You can have as many reports as needed in each location. Creating a new report is easy from the dashboard Reports screen.

1. Expand the location menu and select **Reports**.
2. On the Reports screen select **Create Report**.

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3. Choose the **Report Type** that you want.

Schedule Reports

REPORTS: Regulatory Report (selected)
LOCATIONS: SecondCo prod - 687 S Beshear Ct, Erie, CO 8051...
REPORT NAME: SecondCo prod Regulatory Report

4. Enter any **Frequency** that determines how often the report will generate.

Frequency

Send Report: Daily

Select Time: 12 : 30 PM

Custom Message:

5. Select which **Recipients** will be notified each time the report runs.

Devices & Reading Times

Choose Devices: All devices

Recipients: Brent Meriwether (brent-prod071321@yopmail.com)

Buttons: Add Recipient, Cancel, Save Report

→ Don't forget to **Save** the report so that it gets added to the list of reports that get run.

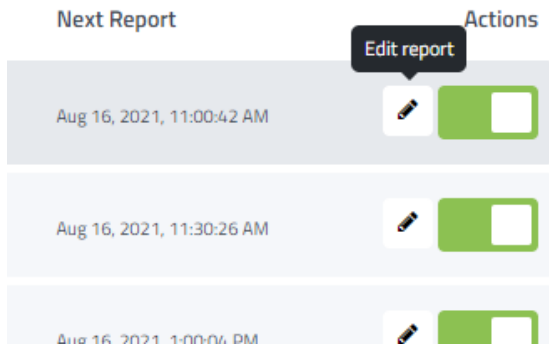
Edit Existing Reports

1. Expand the location menu and select **Reports**.
2. On the Reports screen you will see a list of active reports.

Name	Report	Locations	Recipients	Frequency	Next Report	Actions
Acme Waste LLC Summary Report	Summary Report	Acme Waste Test Site - 1223 Wilshire blvd, STE 490, santa monica, CA 90403, United States	Ryan Smith	Daily	Aug 17, 2021, 7:09:38 AM	

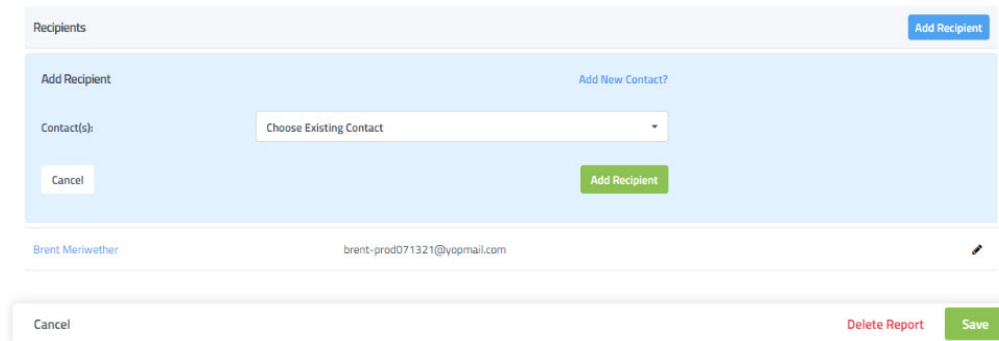


3. Select the **Edit** (pencil) button to open its settings.



4. After opening the Report settings for editing, you can adjust is needed. The most common reason to adjust settings is to add or remove **Recipients**.

- a. Add a new Recipient, select **Add Recipient** and select the appropriate Contacts from the dropdown.



→ Don't forget to **Save** your changes.

Follow this link for more information on Reports <https://iot-help.scrollhelp.site/iotkb/reports-overview>