

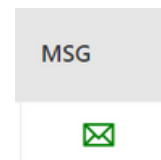
# Adding Message Recipients and Users



Message Recipients

Must have Configure User Access

1. From the OmniView 2.0 home screen, locate the Unit ID you want to add messaging to
2. Select the green envelope under the MSG column in the row of the Unit ID



3. On your new "Machine Recipients" window, click the "+ Create New Recipient" icon at the top right corner of the page



4. Choose the name/address from the "Recipient List" provided if applicable. If this is a new contact, enter the appropriate "Recipient Name" and "Email/Phone Number" in the fields right of the recipients.

5. Check the box next to "I verify..."

6. Check the box "Recipient Active"

7. Check the box "Recipient Machine Active"

8. Select message type from the drop down (see glossary of message types for further detail)

9. Select recipient mail type from the drop down: (Text/HTML)

10. Save!

This process will automatically create a user. See "Creating User" section to complete user setup.

# Adding Message Recipients and Users



Creating Users

Must have Configure User Access

Note: To properly complete this process, please follow the Adding Message Recipients instructions first.

1. From the OmniView 2.0 menu, select “Configuration>Users”
2. Click the drop down arrow for the user you wish to configure, then select to: “View, Edit, Update Password, Update Email, Send Invitation, or Delete”
  - a. If you wish to provide this user access beyond “view only” access, choose “Edit” and click the following “Recipient Configurations”
    - i. **Company Admin** – Gives users the ability to see ALL units on the company home page, webpage modification, command rights display items, first page parameters and footnotes
    - ii. **Company User** – Gives users the ability to see ALL units on the company home page
    - iii. **Config Permission** – Gives users the right to configure units
    - iv. **Command Permission** - Gives the user the ability to send commands
    - v. **User Config** - Gives user the ability to see, add or delete message recipients and to configure users to the system
      1. It is **NOT** recommended to provide “Company Admin,” “Company User,” “Config Permission, or “User Config” to end-users as these are typically reserved for OmniMetrix dealers.
3. Click Save
4. If “view only” type of access is desired, from the dropdown menu of that user select “Send Invitation”
5. The “Send Invitation” option will send an email to the user to setup their password and access the system

# Glossary of OmniMetrix



## Messaging Types

- **Daily Activity** – A daily report that delivers activity information, that is date & time stamped, for events which occurred over the reporting period
- **Daily Summary** - A daily report that delivers activity information providing a total for the number of times the activity occurred over the reporting period
- **Fuel** – Format that only provides messaging alerts about low fuel level. This messaging requires the fuel level data be delivered to the OmniMetrix device through a Modbus connection or by using one of our Fuel Monitoring options. The thresholds must be set to the proper values and “Persisted” messaging (for the Fuel Level in the Analogs Table) is set up on the unit
  - **Best Practice:** Provided to the Fuel Service company on that generator.
- **Logon Only** – Provides the user the ability to logon to the OmniView system, without receiving any messaging. The user must also be configured in the “Configure User” screen to have visibility on the site. If the user receives any other type of messaging, then “Logon Only” does not need to be used
- **Monthly Activity** - A monthly report that delivers activity information, that is date & time stamped, for events which occurred over the reporting period
- **Monthly Summary** - A monthly report delivering activity information that provides a total for the number of times the activity occurred over the reporting period
- **Persisted** – Format that adds a time filter to a message before that message is sent by our server. This is sent to recipients who only want to know when their generator is in some sort of distress
  - **Best Practice:** Used for customers who want to be alerted only when their generator is in some sort of distress. Used for Dealer customers to be alerted when the generator is in distress, but not receive all of the run information

# Glossary of OmniMetrix



## Messaging Types Continued

- **Service Trouble Ticket 1** – Format that sends messaging, every 12 hours until acknowledged, based on Persisted Message timing. This messaging format must be used in conjunction with the OmniMetrix Trouble Ticket Process (see “View” menu, “Trouble Ticket” tab) which allows the recipient to track repairs on a given unit. This format is a Dealer only option
  - **Best Practice:** Used for Dealer techs in critical power situations. The tech must be trained on the proper use of the OmniMetrix Trouble Ticket System
- **Service Trouble Ticket 2** – Format that provides escalation to other message recipient (in the dealer group), if the message sent to the Service Trouble Ticket 1 recipients is not acknowledged within 25 hours
  - **Best Practice:** Escalated to higher level Dealer personnel, on critical power situations. This person must be trained on the proper use of the OmniMetrix Trouble Ticket System
- **Standard** – Format that provides messaging on every state change of a generator
  - **Best Practice:** Used for customers who want to see every event on their generator
- **Weekly Activity** - A weekly report that delivers activity information, which is Date & Time stamped, that occurred over the report period
  - **Best Practice:** Used for residential customers
- **Weekly Summary** - A weekly report that delivers activity information that provides a total for the number of times the activity occurred over the report period

