Manuals+ — User Manuals Simplified.

PROEMION DataPortal Responsive Web Application User Guide

Contents

PROEMION DataPortal Responsive Web Application
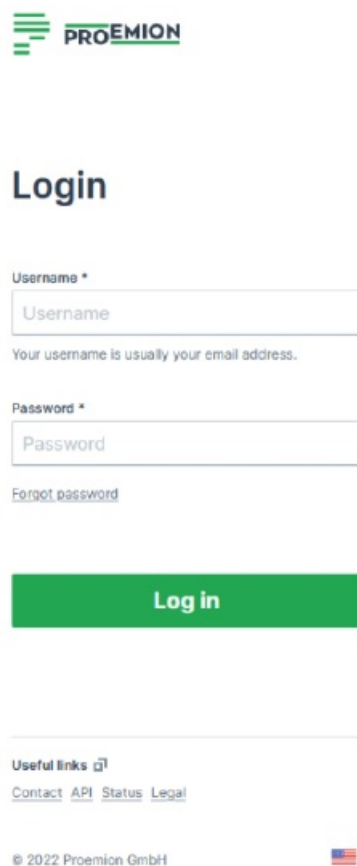

Get Started

The Proemion DataPortal is a powerful and easy-to-use platform to manage your fleet of telematics-equipped machines. This guide is for new users who want to get started immediately using this feature-rich application. In these pages you will find an introduction to the following functionality:

- Login and password
- Dashboard for an overview of your fleet
- Machines overview and details
- Highly configurable real-time reporting tools and widgets
- Customize the layout of your DataPortal with just a few clicks of the mouse

If you need more information, please refer to your Proemion partner or consult the documentation at Document Library.

Login Page

Access the DataPortal from your web browser

Figure 1. Enter your Username and Password

Type in your login credentials

- Username
- Password

Click Log in.

Mainland China Access

The DataPortal China (← use and bookmark this link) is fully licenced to operate in China. This enables our portal to be accessed reliably by our users within China, however the data (CU and so forth) storage has not changed. Using the standard DataPortal will result in slowdowns and errors.

Password Policy

New users are asked to create a new password with the following criteria: The password must have

- Min 12 characters.
- Max 64 characters. Any character is allowed.
- Different from username or email.
- Max 2 consecutive characters.

Password Reset

Users can reset their password by selecting the Forgot password link. You are then prompted to enter the account email address and a link to change the password will be sent. Enter your new password according to the Password Policy.

The link for the password reset is valid for 10 minutes

Dashboard

In the DataPortal there are two different types of dashboards available for customization with an individual widget layout. The organization associated dashboard provides an overview of your machine fleet and data on an organizational level. A model associated dashboard can be configured to display specific signals and states for a certain machine and its corresponding model when opening the machine details page. For both types of dashboards, the same set of widgets is available for configuration of a customized widget layout. Since there are certain rules for displaying the several dashboards, it is essential to distinguish between organization associated dashboard and model associated dashboard. The basic idea of an organization associated dashboard is to show the most relevant parameters for the entire fleet and organization. The model associated dashboard is aimed to show machine and machine model specific data. Please be aware that the organization associated dashboard is bound to an organization and a model associated dashboard is bound to an organization and a machine model. Especially when having a rather complex organization tree and a fleet with different machine types and models, the assignment of a dashboard to the organization and model has an important role for the visibility down to the machine owner organization through the entire organization tree.

Recommendations for handling of organization associated dashboards

- It is highly recommended for organization associated dashboards to just assign it to the top level organization and leave the organization units below unchecked. The lower level organizations will automatically inherit the organization associated dashboard from their parent account then.
- Since the management of multiple dashboards requires additional administration efforts at the lower level organization units, it is also recommended to keep the organization associated dashboard as generic as possible. So it can be used for all available types of accounts.

Recommendations for handling of model associated dashboards

- Before starting with the configuration of model associated dashboards, it is recommended to ensure that the

different machines are clustered within a separate [Machine Model] with its corresponding [PDC Management] first.
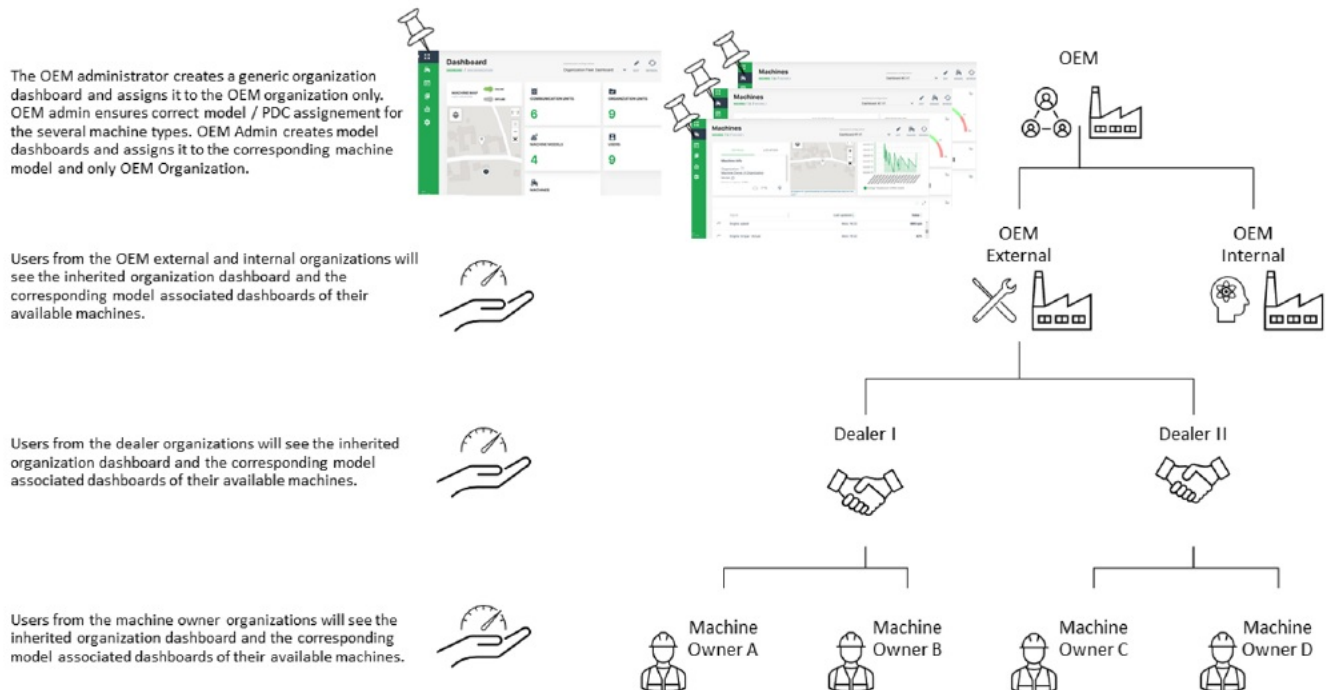
- Assign the dashboard to one or multiple model(s) and your own organization unit. The inheritance rule will show the model associated dashboard in all lower organization units when clicking on the corresponding machine details then.

INFORMATION
Organizations without saved dashboards automatically inherit saved dashboards from higher-level organizations. Therefore, in many cases, saving only on the highest organizational unit corresponds to saving for all subsequent organizational units (SELECT ALL).

INFORMATION
A video tutorial on how to create and assign a customized dashboard for the lower level organization units can be downloaded at the following link Dashboard Management Part 1. In case that an updated version of the dashboard needs to be pushed to the lower level organization units, please refer to Dashboard Management Part 2.

Organization Dashboard

The organization associated dashboard displays the required datasets and information for the entire organization. Depending on user permission sets, users are able to adjust the layout of this page.

Figure 3. Organization associated Dashboard

It is also possible to create and save multiple organization associated dashboards for dedicated target users, application and time range. In this case, the desired organization associated dashboard must be selected from the drop-down menu.

Figure 4. Multiple Organization associated Dashboards

Model Dashboard

The model associated dashboard displays the required datasets and information for specific machine models and herewith for all machines which are assigned to this model. The Model Dashboard is also referred to as the Machine Details page. Depending on user permission sets, users are able to adjust the layout of this page.

Figure 5. Model associated Dashboard

Search

The DataPortal includes a search field that allows you to perform a single-click global search for the following objects

- Machines (machine name or IMEI number of CU)
- Vehicle identification number (VIN)
- Product Identification Number (PIN)
- Serial number
- Users*
- Organizations*
- Models*

*Searching users, organizations and models is only possible from the Administration panel. By entering a search term in the field, an autocomplete results window will appear as long as there is a match. Selecting an entry from the results forwards you to the machine details page for the communication unit.
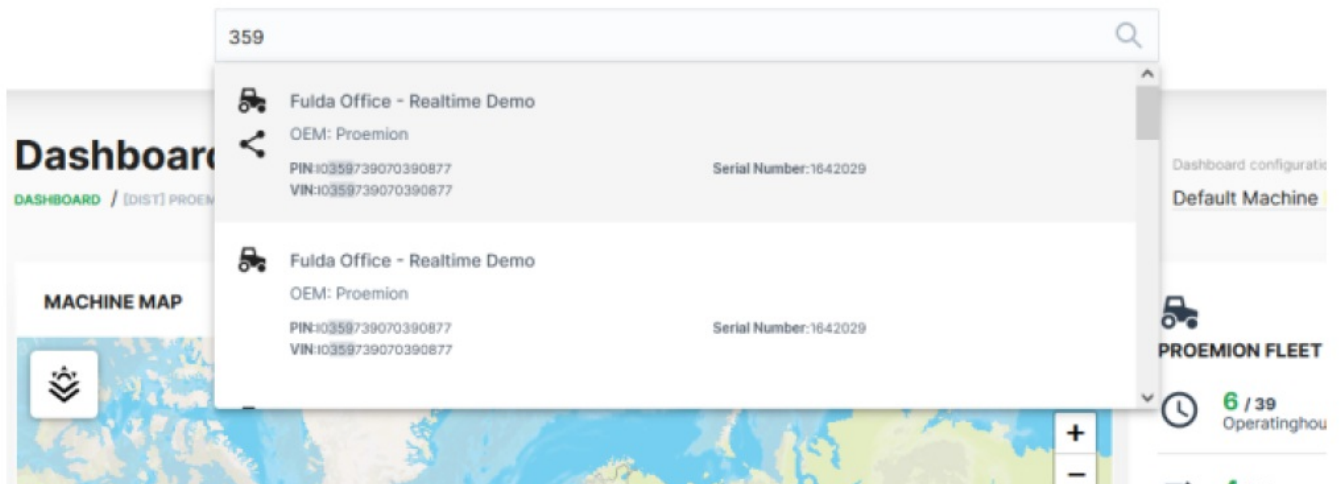

Figure 6. Search Example

In the list of results that appears, the matches are displayed in bold.

Machines

Machines Overview

Selecting Machines from the left-side menu opens an overview of telematics equipped machines in your organization.
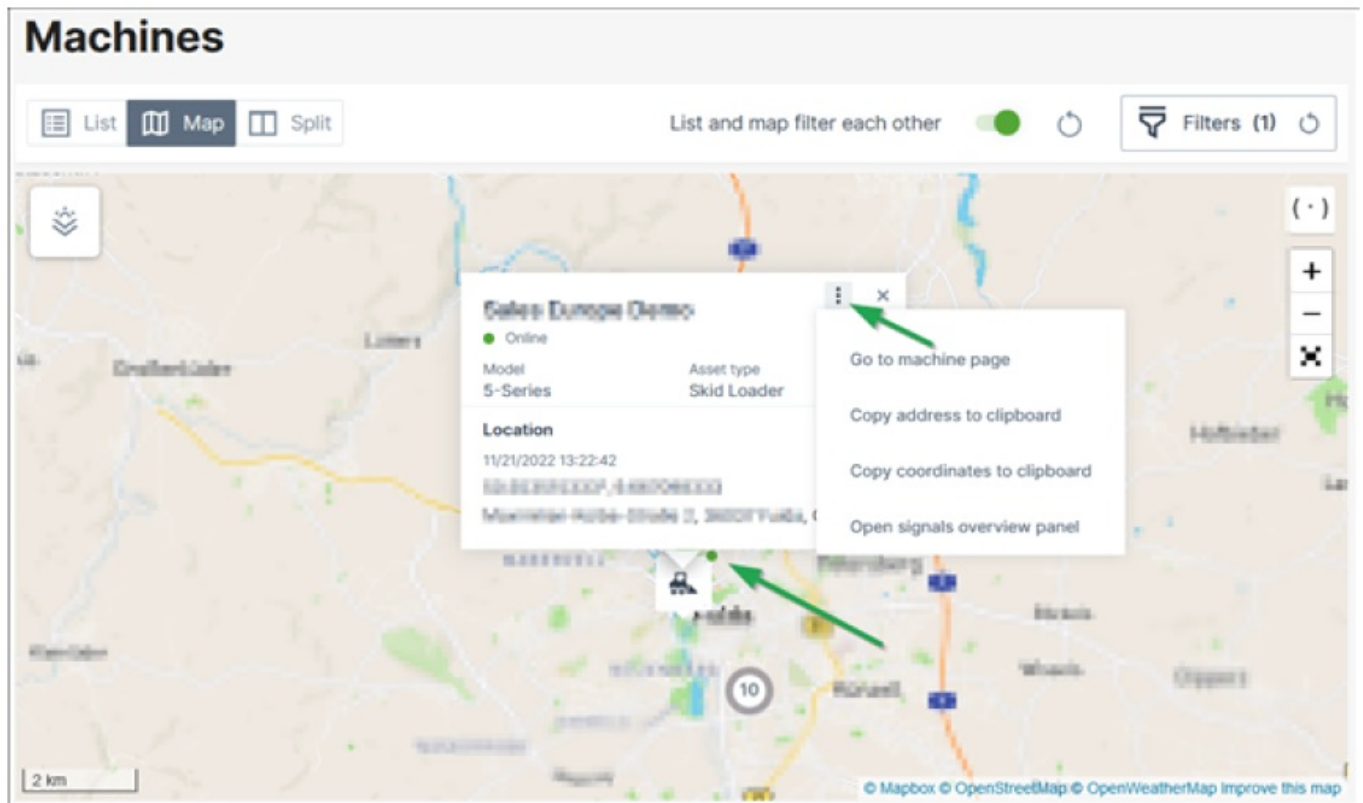
Figure 7. Map with pop-up

The map shows the most recent recorded positions of all machines. Machines that are located in close proximity to one another are grouped together and identified by a cluster symbol. Zooming in or selecting the symbol shows each individual machine.

For additionally showing weather-related information or changing the map type, you can configure the map type

and [Maps Overlay] via the Overlay icon

Selecting a machine on the map displays a pop-up with following details

- Machine Name
- Current connection status (online or offline)
- Model
- Asset type; if there is not asset type assigned to this model, the organization unit name is displayed instead
- Location details
- Date and time of the most recent status change
- Maintenance status (if the maintenance filter is applied)
- Drop-down menu via the three-dots

Figure 8. List

The machine list displays the following parameters in different columns

- Online state
- Name
- VIN
- PIN
- Serial Number
- Model name
- Organization unit name
- Last contact and Last datapoint*1
- Asset type
- Machine details link*2

You can remove or add each column from the list. You can sort by each column in the table by selecting the arrows above the column. Filter and search are available by entering the searched text into the fields at the top of each column. You can export the list as CSV or xslx. Note that all columns will be exported 1Last contact shows the timestamp of the last time the CU contacted the DataPlatform, i.e. went online. Last datapoint shows the timestamp of the last datapoint, i.e. transmitted files like updated clf file or received signals, e.g. weather data. *2You can open the details pages by selecting an entry in the list or selecting the 3-dots by the end of the line of each machine.

Sidebar

The right sidebar view provides a quick overview about the machine state and measurements. You can open the sidebar by selecting the row of the machine in a Machine List or selecting the option Open signals overview panel in the Machines Overview.
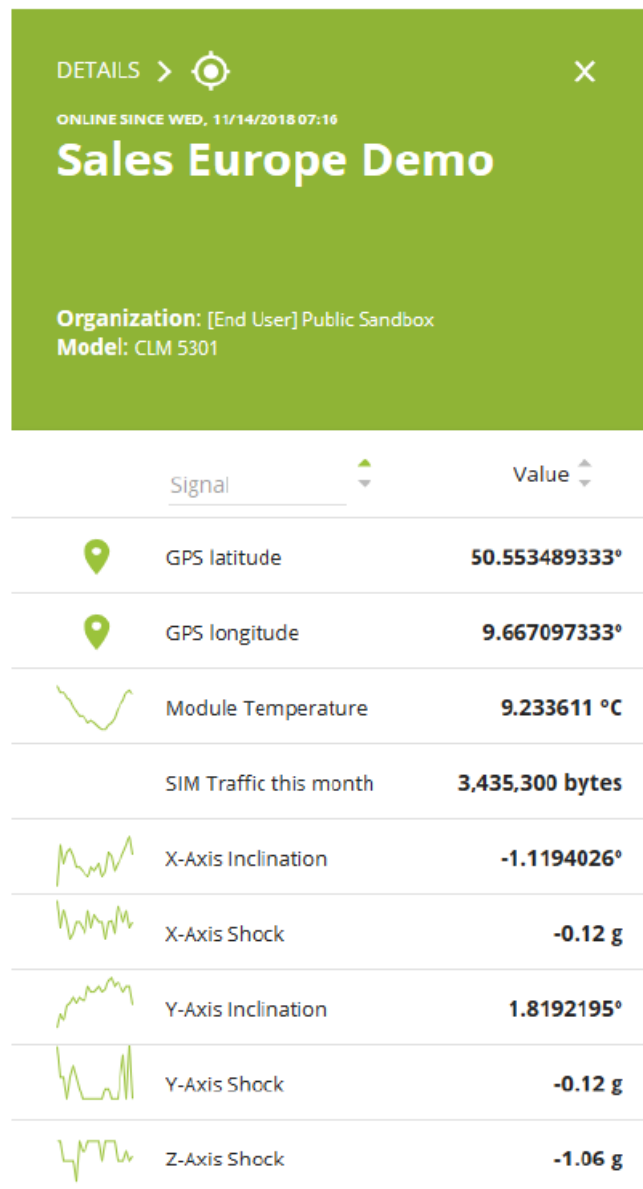
Figure 9. Sidebar panel

General machine information is displayed at the top of the control panel

- Online / Offline state
- gray background color indicates currently offline
- green or blue background color indicates currently online
- Time of most recent state change
- Machine Name
- Organization the machine belongs to
- Machine Model

Click on Details to open the Machine Details page. Click on the marker icon to zoom the map to the machine

Machine Details

The Machines Details page is a representation of the data of a particular machine. You can open the Machines Details page via the Machines Overview, the Sidebar or searching the machine. The content is defined for the

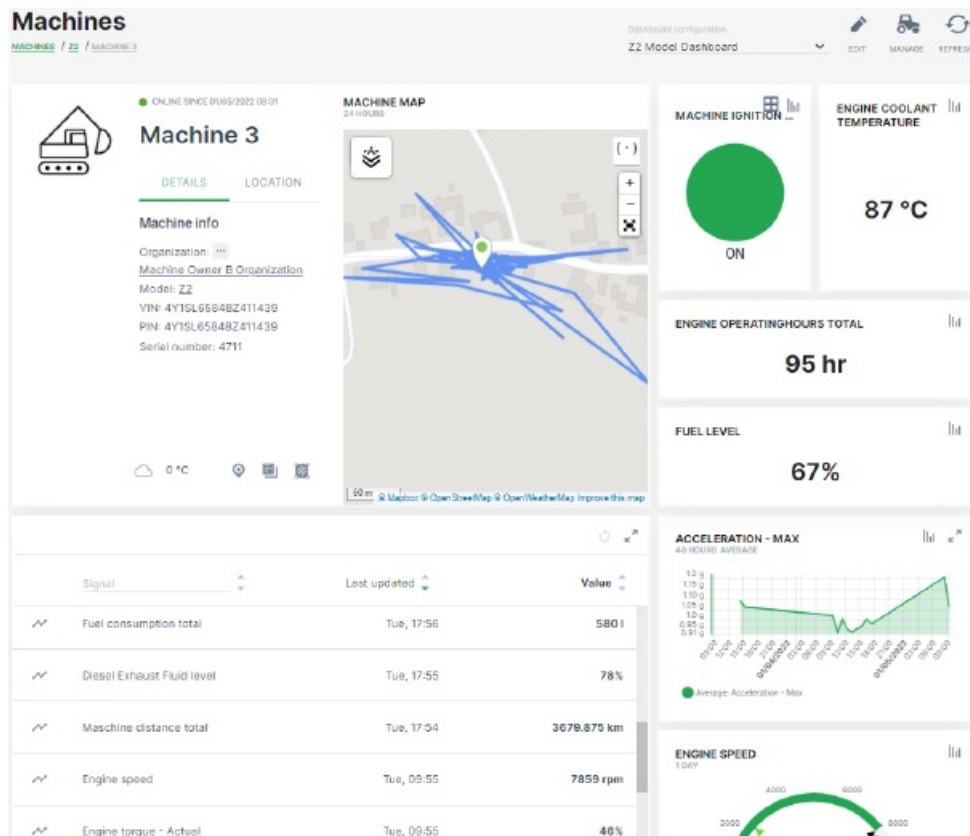machine or model. The visualization setup is configured by an Administrator

Figure 10. Machine Details with Machine Master Data widget

The Machine Details panel will then display the following information

- Item Description
- Connection Status Current state (online/offline) since a particular date.
- Machine Name –
- Organization The organization that created the machine and share details.
- Machine Model –
- Machine SN Serial number for the machine.

Reports

Report Parameters

The following parameters are shared between all the report modules

Reports

CONFIGURE PLOT

RESET ALL   APPLY   (11)

Time range   (1)
24 Hours   Bucket *   (2)
    Minute   + ADD METRIC   (10)

○ One Machine   ○ For each machine   ○ Aggregate all

Machines filter

OEM   Model   (3)
Sigma   Z3

Location
All Locations

+ CLONE METRIC   (9)

Machine *   (4)
Machine 6T

Color   Signal *   (5)   Minimum   (7)   Maximum
    Engine coolant tempe...   Selection **   Selection **
        Automa...   Min   Automa...   Max

    Line Style *   Aggregation *   (6)
Fill   Line   Average   With Threshold   (8)

Figure 11. Reporting Configuration

Table 1. Reporting Parameters

#	Item	Description
1	**Time range**	Allows you to define a **RELATIVE** or **ABSOLUTE** time range for the data to be reported.
2	**Bucket**	Allows you to define the time intervals for the data aggregation.
3	**Machine grouping**	This option allows to create a plot for a single machine, for each machine or an aggregation of the data for all machines of a certain model.
3	**Machines filter**	Allows you to filter for OEM, model and location of your fleet machines.
4	**Machine**	Selector for a specific machine.
5	**Signal**	Selector for the required signal to be reported.
6	**Aggregation**	is the value returned for the signal. The value is calculated using all the measurements within each Bucket. Some common types are listed: – *Minimum*: the lowest value recorded for the signal. – *Maximum*: the highest value recorded for the signal. – *Average*: the mean value of a signal.
7	**Scaling**	**Automatic**: the actual min/max values of the signal within the time-frame are applied in the report, chart or plot. **Manual**: manual definition of upper and lower limits for the values to be displayed **Predefined by OEM**: the predefined min/max values are applied to the individual signal (as suggestions) and can be edited. For signals with identical units, the overall min/max values are applied to: – The Y-axis in plots. – The X- and Y-axes in scatter plots.
8	With Threshold	Optional display of the specified threshold for the selected signal.

#	Item	Description
9	**CLONE METRIC**	Allows you to clone an existing data set and include it in the report.
10	**ADD METRIC**	Allows you to add another machine or signal to the report.
11	**APPLY**	Updates the report. **Reset All** removes all the information from the report configuration.

Signal Plotting

Plots are the standard reporting tool used to visualize signal variation during a time period in the DataPortal. You can design a report to visualize data for multiple signals for the same time period, and/or compare an identical signal from multiple machines. Configure a plot by following the steps below:

1. Select Reports from the left-hand menu to expand the DataPortal reporting menu.
2. Select Plots.
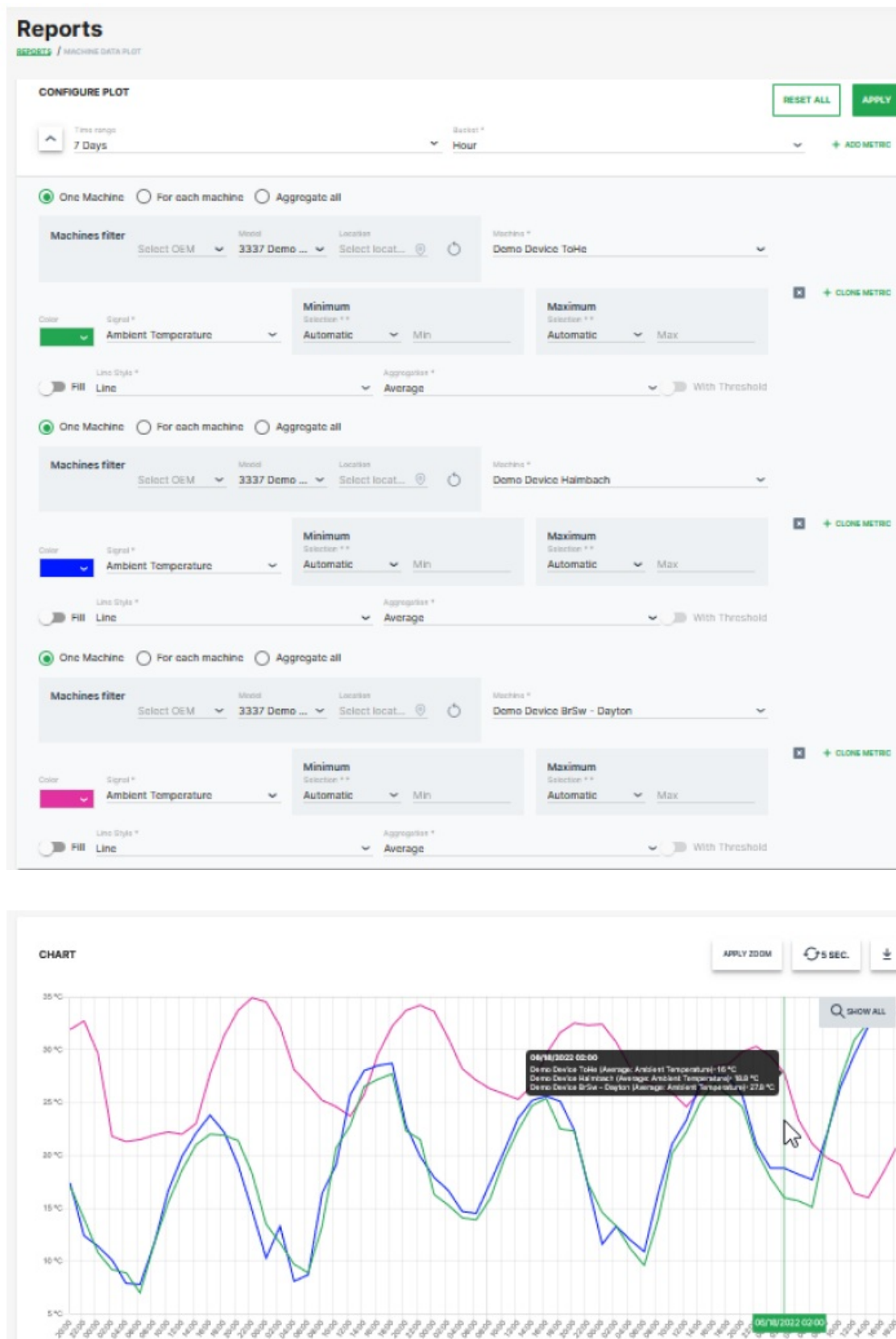3. Configure the parameters for your plot.

Sample

Figure 12. Plot Example

The example shows data for an identical signal (Ambient Temperature) from 3 different machines. For each measurement, the unit is displayed on the axis and in the tool tip.

Scatter/Bubble Plots

A Scatter Plot is a two-dimensional plot that uses dots to represent values for two different numeric variables. The position of each dot on the horizontal and vertical axis indicates values for an individual data point. Scatter plots are used to observe relationships between variables Bubble Plot information and instructions can be found in the {user-manual} > Scatter/Bubble Plots

Scatter Plot

Figure 13. Scatter Plot Configuration

Table 2. Scatter Plot Configuration

#	Signal	Description
1	Time Range	Select the time period for the measurements up to the previous 2 years.
2	Indicator/Color	Choose from *bubble*, *diamond*, *triangle up*, *triangle down* symbols and the color.
3	Model/Machine	Select the model and machine to display the comparison.
4	Signal/Aggregation	Select the signal to be the displayed and the aggregation.
5	Scaling	Scale automatically, manually or use predefined min/max values from PDC..

The example shows data sets from machines which belong to a demo model. The plot can be used for visual comparison
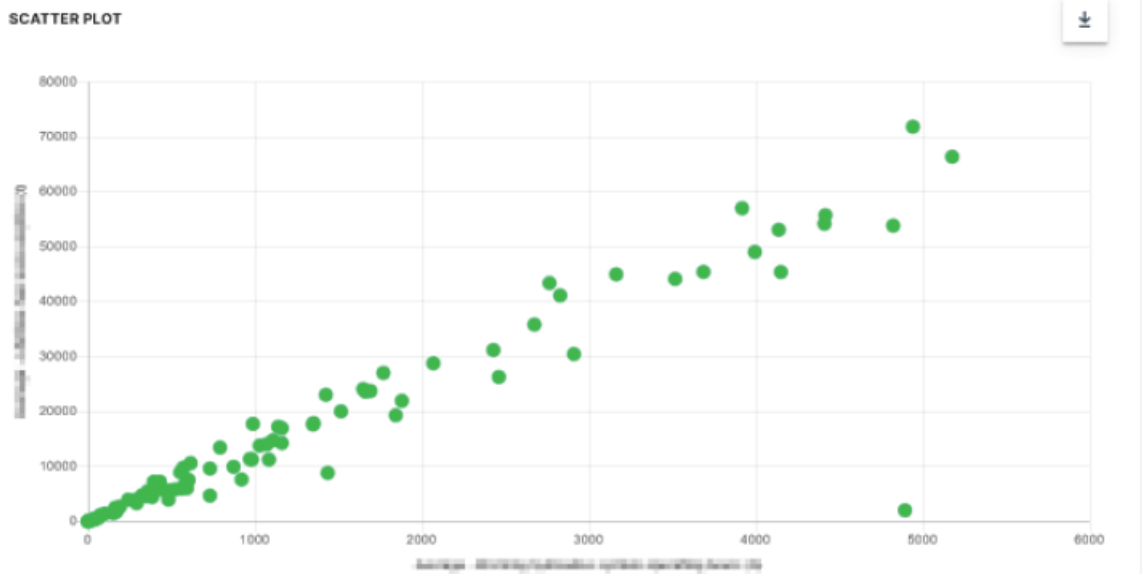
Figure 14. Scatter Plot

Tables Visualization

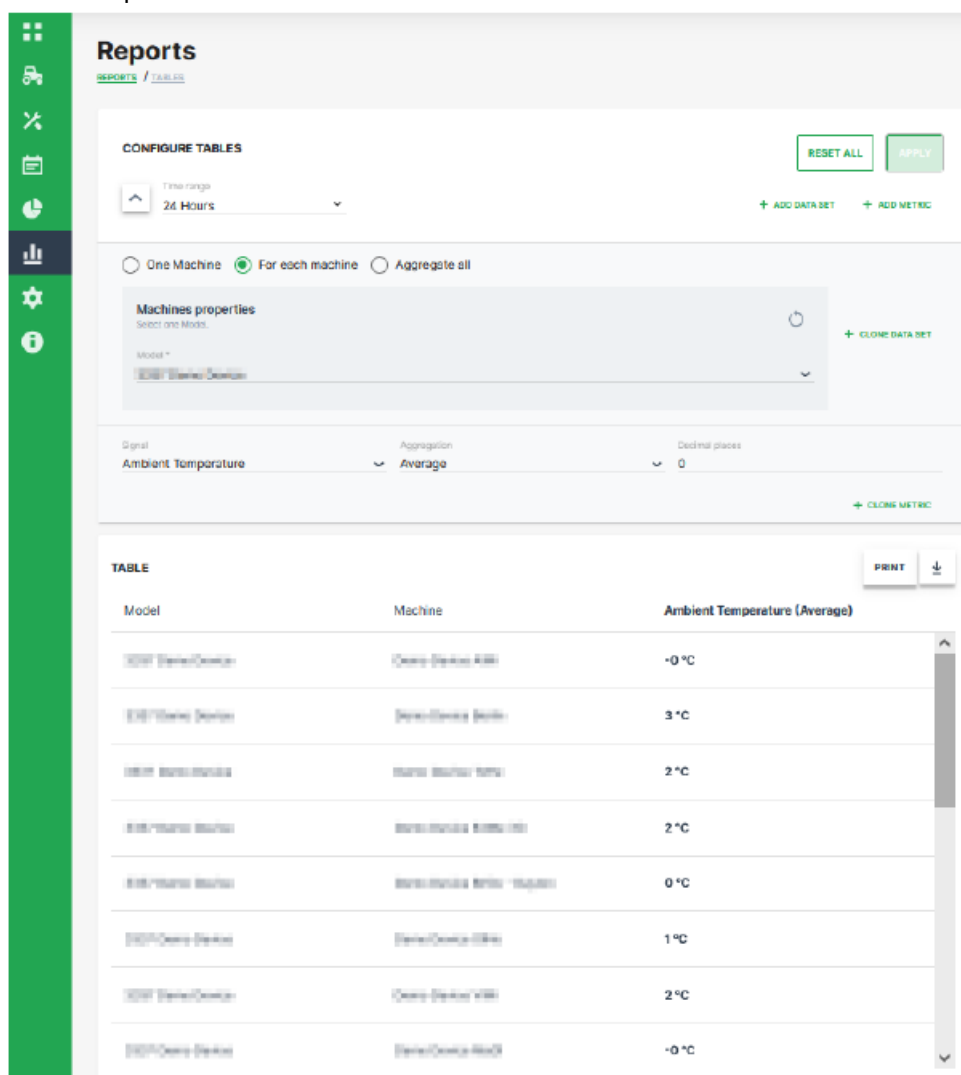The Table report is the simplest visualisation for data-sets

Figure 15. Table Example

This example shows the output results of the data sets from different machines of a specific model on a single

table.

Branding

As an Administrator, you can customize the theme (logo, color scheme, title, etc.) of your organization in the DataPortal. On the left-side menu, select Administration > Themes. The Themes customization page opens where you can adapt the design for different sections and element of the DataPortal.

Browser Title Bar

In this area the brand name and the favicon are defined which should then be displayed on the webpage tab

Figure 16. Application name

Design

Figure 17. Design

Login Page

In this area the Custom DataPortal Login (URL handling), login image and the footer links at the login page are defined.

LOGIN PAGE

Login page URL

If no login page URL is given, the default login page is
used, which can be customized in the following.

Copyright for website and email

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LOGIN IMAGE

Choose File or drag it here

Recommended image size ~2000×1200 pixels
Max file size 2MB
Allowed file types .jpg, .jpeg, .png, .gif, .svg
Decoration of login landing page by placing this
image on whole right side

LOGIN FOOTER LINKS

Privacy Policy and End User License Agreement
documents should not be used in this section. Please
add them as Legal links here.

Language
🇺🇸 English

+ ADD LOGIN FOOTER LINK

Display
Contact

URL
https://www.proemion.com/en/support/con

Display
API

URL
http://docs.proemion.com

Display
Status

URL
http://status.proemion.com

Display
Legal

URL
https://www.proemion.com/en/company/im

Custom DataPortal Login (URL handling)

You can use your own login page (i.e. your own landing page or website) to allow customer access to the
DataPortal. To do this you must implement the following form on the page where you want your customers to log
in to the DataPortal remotely (from a URL you provide):

```html
<html>
  <form method="POST" action="https://api.proemion.com/authz/oauth2/token">
    <input name="username" type="text">
    <input name="password" type="password">
    <input name="grant_type" type="hidden" value="password">
    <input name="client_id" type="hidden" value="portal">
    <button type="submit">Login</button>
    <input name="redirect_uri" type="hidden" value=
"https://dataportal.proemion.com/#!/dashboards">
  </form>
</html>
```

All URLs must utilize a secure connection – https:// – and this also eliminates the possibility of using a local file. The Login Page URL is where the users are returned when they log out of the DataPortal.

Figure 19. DataPortal Theme, URLs

Table 3. Customizable branding, further options

Item	Description
1 – Login Page URL	Login to the DataPortal from a URL of your choice. Default maximum length is 200 characters.
2 – Links and Footer	Add links and display text (100 character maximum) to the page footer.
3 – Login Image	Upload your own image to the standard DataPortal login page.

Behavior Options

Figure 20. Design

The options in the table below allow you to customize the user experience on the DataPortal machine overview.

Table 4. DataPortal Behavior options

Item	Description
Show map on machine overview	Show the map on the machine overview page.
Show realtime mode toggle on machine overview map	This option allows the user to filter machines by their operating mode at the machine overview map.
Show VIN or machine overview list	Include a column with the Vehicle Identification Number (VIN) in the list of machines.
Show PIN on machine overview list	Include a column with Personal Identification Number (PIN) in the list of machines.
Show serial number on machine overview list	Show the serial number column in the list of machines.
Enable visibility of the right panel with the overview of signals	**Sidebar** appears when selecting a machine from the machine list or on the map.

Custom Menu Entries

The DataPortal allows you to add menu categories to the main menu with URL links provided in the panel on the

left side. To add a menu category with menu links to your DataPortal menu, go to Themes > Menu section and proceed as follows:
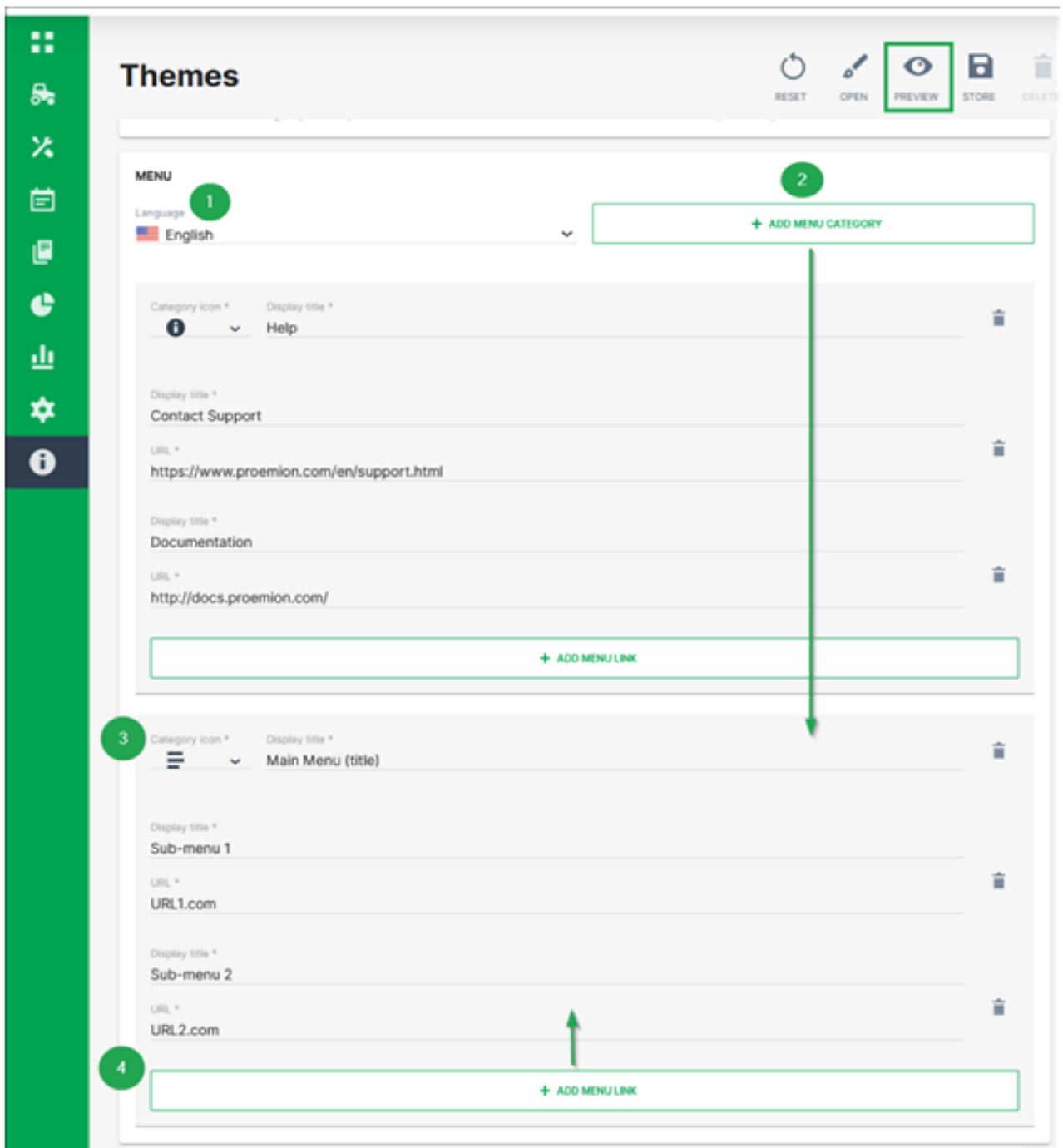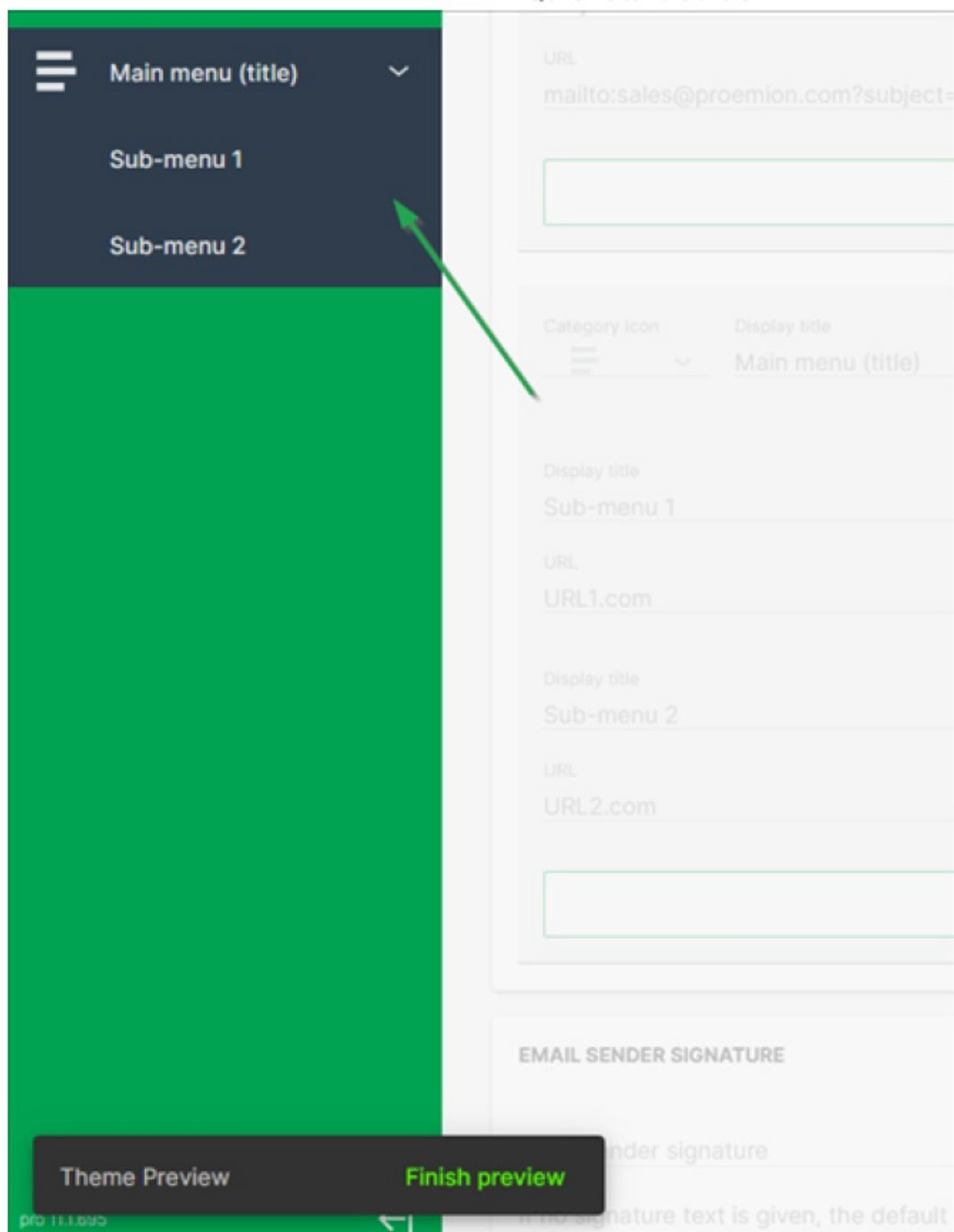

Figure 21. DataPortal Theme, Custom Menu

1. Select the language of the DataPortal you want to add the new menu category for.
2. Click +Add Menu Category. The section for menu category opens.
3. Select a Category icon and add the Display title that will be used as the header of the drop-downmenu in the panel.
4. To add sub-menus, click Add menu link.
5. Add the Display title and provide the URL for the clickable sub-menus. You may add as many menu links as desired.
6. To create a preview of your custom menu entries, click Preview in the upper-right corner. The preview is shown in the same window and can be stopped by selecting Finish preview.

7. To save your changes, click Store in the upper right corner

Custom DataPortal Email Sender Signature

Figure 23. DataPortal Signature

Simply enter the text you want to appear in all of your DataPortal emails and save your changes. Version:

11.0.335

Documents / Resources

QuickStart Guide	**[PROEMION DataPortal Responsive Web Application](#)** [pdf] User Guide DataPortal, Responsive Web Application, DataPortal Responsive Web Application, Web Application, Application

References

- **Sign in to your account**
- **Sign in to your account**
- **Portal**
- **Portal**
- **Portal**
- **Product Documentation Library | Proemion**