User Guide: SpillGuard – Introduction to Administration.
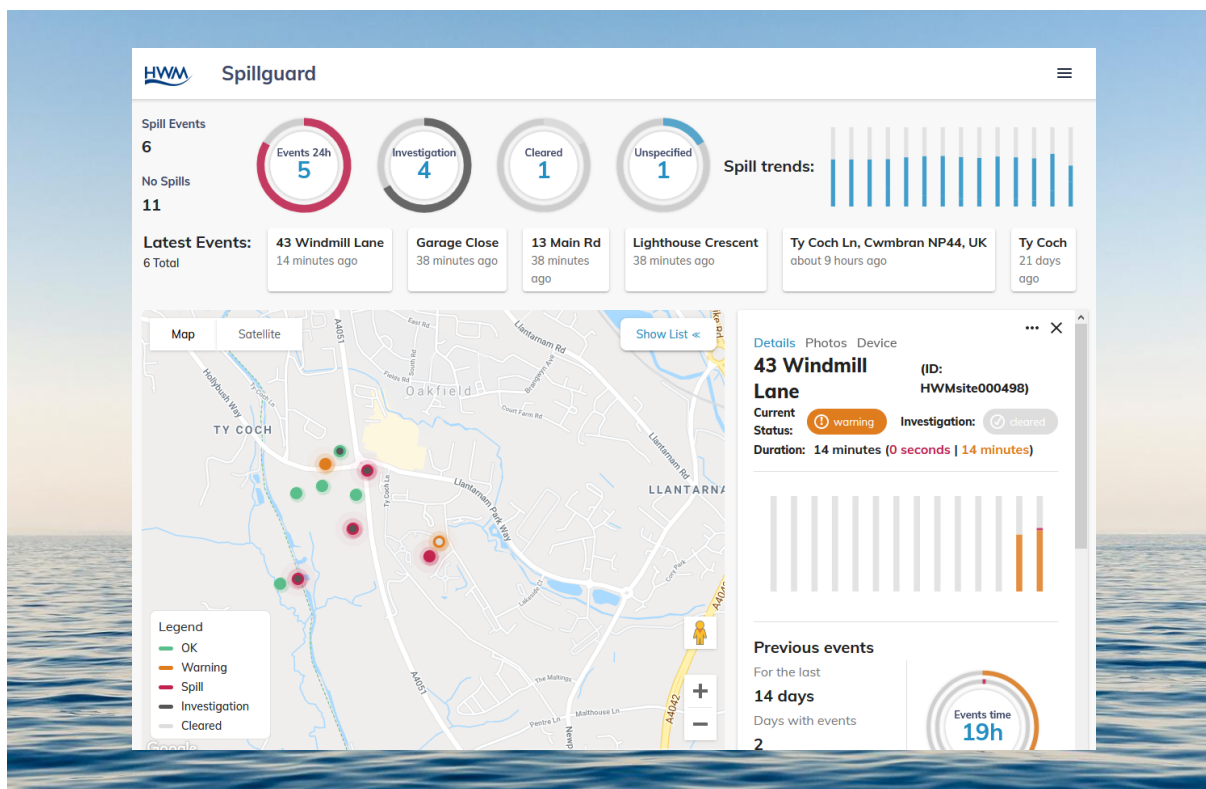
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1 SYSTEM DOCUMENTATION AND SUPPORT OF PRODUCT

1.1 DOCUMENTATION AND TECHNICAL SUPPORT

The manual introduces the reader to the administration of the SpillGuard system. The administration for SpillGuard is split between two systems:

- HWM DataGate2 system.
- SpillGuard system.

Reading of the following is a pre-requisite to reading this manual:

MAN-130-0015   DataGate2 – Introduction.
MAN-130-0016   DataGate2 – Introduction to Administration.
MAN-3000-0001 SpillGuard – Introduction for Users.

The setup of the SpillGuard system for use requires the administrator to use DataGate2.

Some HWM mobile-phone apps exist that can *partially* automate some of the setup of DataGate during the installer's activities for logger and sensor deployment. Refer to the app manual for details of its operation.

An administrator will have access to the same features of SpillGuard as a regular user, plus additional features. These additional features are defined within this manual.

Note: The system periodically has new features and changes released, thus you may observe slight changes in layout from those shown in this manual. Additionally, views can vary depending on what user-role you have been given and its permissions.

HWM provides support of the DataGate2 system by means of a set of online help documents. SpillGuard has some limited guidance in the form of tips or hints that appear when hovering your mouse over certain controls or fields.

On-line help pages are also available from our support webpages:

https://www.hwmglobal.com/help-and-downloads/

Should you have any questions that are not covered by this manual or the system's online help, please contact the HWM Technical Support team on +44 (0) 1633 489479, or email   cservice@hwm-water.com

2 SPILLGUARD – FEATURES OPEN TO ADMINISTRATORS ONLY

The information in manual MAN-3000-0001 SpillGuard User Guide is also applicable to an Administrator; Use it as a source of reference.
e.g. It contains instructions for logging into and using the SpillGuard system.

Administrators are able to undertake the following tasks within SpillGuard, that are not available to regular users:

- Opening an investigation for a site
- Changing the investigation status of a site into the clearing mode.
- Changing the investigation status of a site from the clearing mode back into open.
- Adding notes to a site during any currently active event.

For details of how to undertake these tasks refer to the SpillGuard user guide, MAN-3000-0001.

3 DATAGATE 2 – HOW TO SET UP FOR SPILLGUARD

SpillGuard requires some setup to create data structures for the system before use. The data structures required are hosted on the DataGate2 system at the time of first release of SpillGuard. HWM creates the initial account and a User (of the type administrator) for the customer. The administrator (or HWM) can then continue to build the system from that starting point.

Refer to the manual "MAN-130-0016 DataGate2 – Introduction to Administration" for guidance on how to log into DataGate for administration purposes.

The following activities will need to be done to setup the system database to interwork with the SpillGuard system:

- Create Main Account.
  - Initial account made by HWM (see section 3.1 for summary).
  - All other accounts can be created and maintained by your administrator.
- Create New Users.
  - Initial administrator user made by HWM (see section 3.1for summary).
  - All other users maintained by your administrator
    (see sections 3.2 and 3.4 for summary).
- Plan and create the account tree
  - Planned by your administrator (see section 3.1 for summary).
  - Created and maintained by your administrator
    (see section 3.1 for summary).
- Creating loggers.
  - Usually created on your server by HWM (see section 3.1 for summary).
- Creating sites (regular or "blank").
  - Usually HWM creates blank sites, with a new logger linked to each of them, prior to shipping loggers to customers
    (see section 3.1 for summary).
  - Sites maintained (completed) by customer as part of the installation process. The administrator can use DataGate2 administration pages for editing site information, etc; an installer can use a mobile phone app.
    (See section 3.4)
- Associating sites to accounts.
  - Initially HWM (blank site to main or install account)
  - Completed by customer as part of the installation process. (The installer can use a mobile phone app, or administrator can use DataGate2 administration pages for adding the links by editing site information, etc). (see section 3.3 for requirements summary).
- Setup of users for information messages (alarms)
 - Maintained by your administrator (see section 3.5 for summary)

Administrators should refer to the manual MAN-130-0016 for how to do these tasks.

3.1 HWM SETUP OF DATAGATE2 FOR A NEW CUSTOMER AND EQUIPMENT

As described in MAN-130-0015, HWM will create the main account for a new customer on DataGate, along with a new user of the type administrator.

The administrator can then log into DataGate and create the rest of the account tree, having first decided on its plan.

HWM will normally register loggers for use with SpillGuard onto the customer's database, assigning ownership of the logger to the main account. A "blank site" will also normally be created for each logger. One logger will be linked to each blank site.
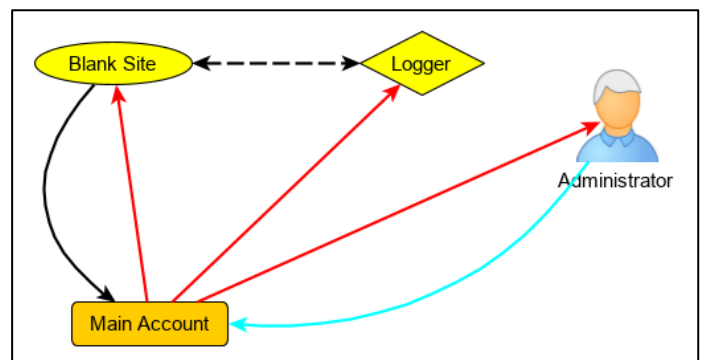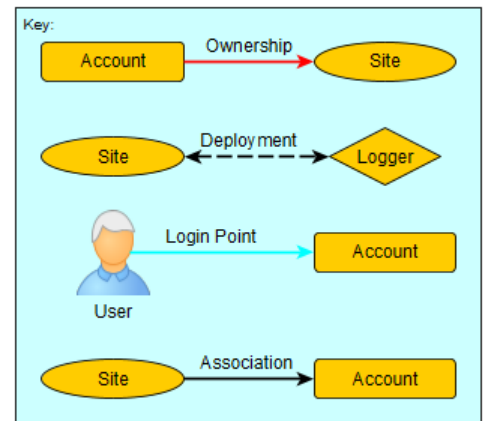
Configuring the devices onto the system in this way allows the administrator to have edit access to the site and logger. It can also allow a mobile phone app to be given edit access to the site and logger.

## 3.2 REQUIREMENTS OF ACCOUNT TREE STRUCTURE FOR SPILLGUARD

The administrator of the main account is free to structure the account as they wish. The account structure should match the needs of the company.

Large company:

If the company is large, the main administrator may set up the tree structure so that it matches the organisation of the company and responsibility of different geographical areas. This could include creating an account for each different area and for each area creating local users and administrators.
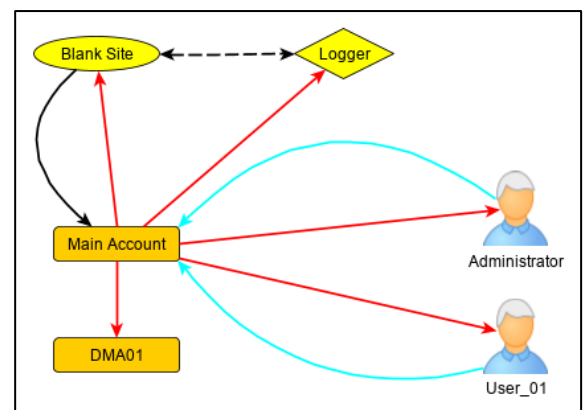
An example is shown opposite.

Other areas can be added by the Administrator as required, (e.g. Area_02, Area_03), along with the users to support those areas.
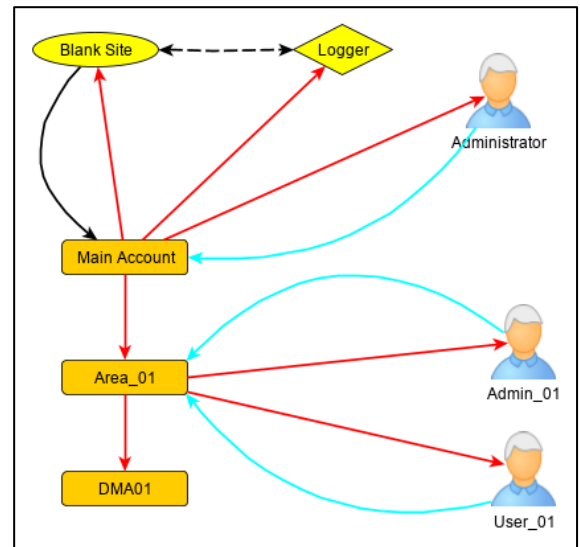
Small company:

If the company is small, a simpler tree can be employed, where effectively the "main account" is also employed as the Area account.

An example is shown opposite.

3.3 REQUIREMENTS OF SITE OWNERSHIP AND ASSOCIATIONS FOR SPILLGUARD

The sensors are *physically attached* to loggers.

Loggers should be *linked to sites* via the DataGate database *deployment* link. This routes the data so that it is stored in connection with the site.

Sites are then an entity that can be moved around within the database accounts and they carry their sensor data along with them.

As explained in MAN-130-0015, in DataGate2 a site has two different types of links that can join a site to an account. These are the ownership link (a 1:1 link) and the association link (a 1:many link).

For a SpillGuard User, the *ownership link has no relevance*; it can be owned anywhere within the system. The main requirement is that *a site must be associated to the account which is the user's login point*.

For consistency, the site should also be associated with the DMA account, and other accounts up to the main administrator. However, the SpillGuard portal has no tool to navigate through the account tree; the user only sees what is associated to his or her login-point account.

The links are shown in diagrams. (Only one site and logger is used for simplicity and assumes the customer is leaving sites and loggers owned by the main account rather than move their ownership to the area account.).

Example for Small Company

Example for Large Company
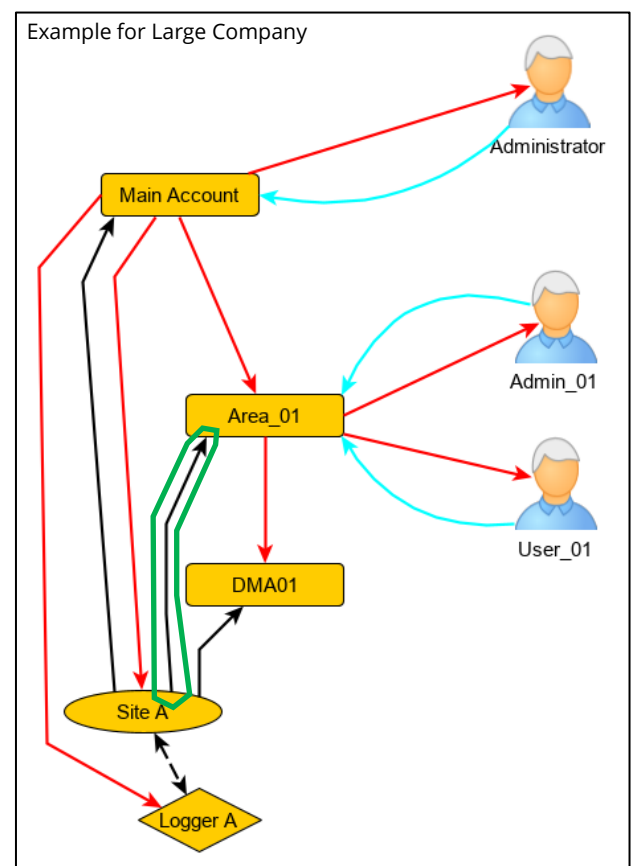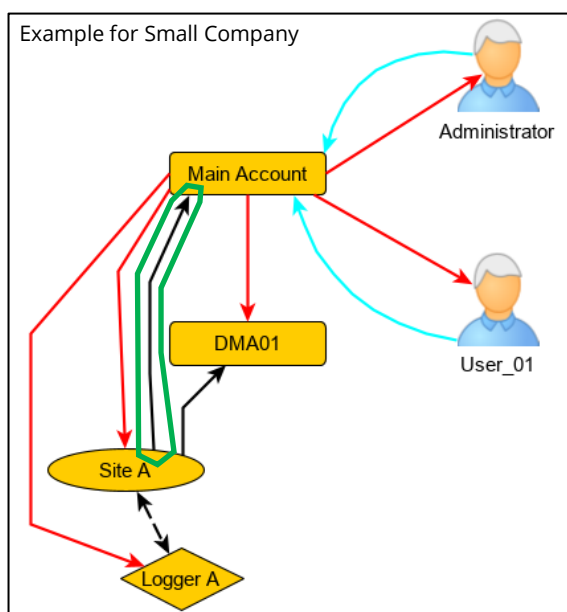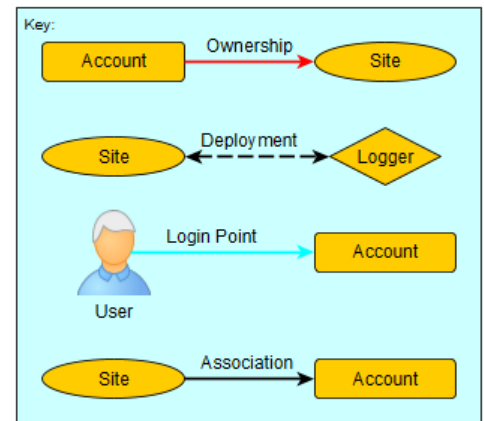
The critical link for user visibility is shown enclosed in green.

Note: The other account structures (e.g. DMAs) are in place only to ensure that existing HWM apps work as expected, or to allow a high-level administrator to set up additional geographical areas to match the company structure.

3.4 SETUP OF USERS FOR SPILLGUARD

SpillGuard gives no ability of a user to navigate through the account structure. Therefore, when a user logs into SpillGuard, their owner account sets their entire scope of view; they can only see sites associated to this one account. Therefore, where the account tree has been structured to include accounts for different areas, the user needs to have their owner account set to the correct area account.

To set up a regular user on DataGate 2 follow the guidance given earlier in this manual and also the instructions in MAN-130-0016.

The user-role should be set whilst creating the user, using the "User Level" drop-down selection box.

User Level:	Admin	∨

- For **regular users** of the SpillGuard system, the user role should be set to "User".
- For **administrator users** of the SpillGuard system, the user role should be set to "Admin".
- For **installers**, it is possible to use an app during installation of loggers on sites for SpillGuard. Each installer using an app will therefore require an account exclusively for use with a mobile phone **app**. The user role for the phone should be set to the type "App".
  Unlike the earlier two types, this user should have a login point set high enough to be able to have edit access to the site and logger.
  (i.e. At the same level of the account that owns sites and loggers, or higher).

Note: Installers can log into the DataGate2 system through the use of a mobile phone app to complete some site details as logger and sensor installation proceeds.

The Installer should not attempt to log into the system via a web-portal using the credentials supplied for use with the mobile phone app; there is no access to system web pages with these credentials.

3.5 SETUP OF THE SYSTEM FOR USERS TO ALLOW USERS TO RECEIVE ALARMS

The system is able to send alarm messages to a SpillGuard user.

Setup of a user to receive such messages is a 2-stage process:

- Setup the user to have alarms routed to them.
    - o Enabling alarms for the user.
    - o Choosing delivery and format options.
- Subscribing to the sites for which alarms which are required to be received.
    - o Individual sites
    - o All sites within an account

Setup of a user to have alarms routed to them must be done by an administrator, using the DataGate administration portal. Follow the instructions in MAN-130-0016.

Ensure:

- The "Enable Report Forwarding" box is ticked (selected).
- The "Enable Alarm Forwarding" box is ticked (selected).
- For alarms to be routed by e-mail:
    - o The destination e-mail address of the user is correct within the user profile.
    - o An e-mail format has been selected.
- For alarms to be routed by SMS (text message):
    - o The destination telephone number of the user is correct within the user profile.
    - o An SMS format has been selected.

Subscribing to the sites for which alarms which are required to be received can be done by:

- An administrator using DataGate 2 (refer to MAN-130-0016).
- The preferred method is for the user use the SpillGuard portal to subscribe to the sites (or all sites) themselves (as described in MAN-3000-0001).

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