

Application Note – Site Administration in the Monitoring Portal

Introduction

This document describes how to use the Admin section of the SolarEdge monitoring portal for site administration.

The Admin window in the monitoring portal includes four tabs, by which you can manage the following site parameters:

Tab	Actions
Site Details	Edit site parameters such as location, feed-in tariff, display options, API, etc.
Revenue	Configure the revenue calculation for a site. Refer to http://www.solaredge.com/files/pdfs/monitoring-portal-revenue-calculation.pdf
Logical Layout	Add or replace system components
Physical Layout	Create and edit the PV system physical layout
Owners	Manage and add site owners

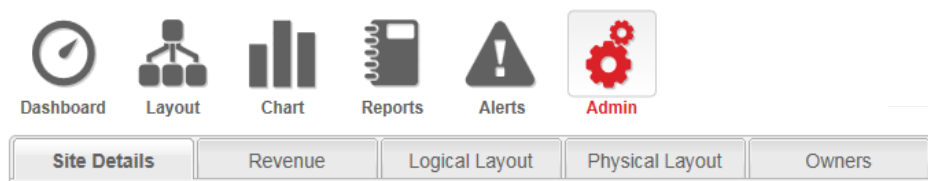


Figure 1: The Admin tabs



NOTE

The Admin window is accessible only if you have account manager user permissions.

Logging-in to the Monitoring Portal

- 1 Access the portal login page at monitoring.solaredge.com (or in any page of the SolarEdge website, click **Monitoring Portal Login**).
- 2 Enter your user name (e-mail) and password (as appears in the confirmation email) and click **Login**.
The first time you log in, there are no sites in the site list. Once sites are created, upon logging in, if only one site is assigned to your account, the site's Dashboard is displayed and you can go to the Admin section. If more than one site is assigned, the list of your SolarEdge sites is displayed. Select the site you want to administer and go to the Admin section.
- 3 If required, you can search for the site by site name, site address (street, city, and country), account name serial number, or notes (of either the inverter or the power optimizer).
- 4 Click the **Admin** icon. The Admin window is displayed, showing the Site Details tab (see Figure 2).


Site Details

The Site Details tab lists all the site parameters that can be entered when registering a site. You can change or add information at any time. If the site does not have a valid location or is not marked on the map, you must fill in a location on the map before making any other edits.

► To edit site details:

- 1 Select the **Site Details** tab, and edit the required parameters. Refer to the table below for available parameters.
- 2 Upon editing completion, click **Save**.

Parameter	Description	Comments
Site Details		
guid	Globally Unique Identifier: A read-only field identifying the site	
Site name	The site name	Must be unique
Peak Power	Specifies the installed peak power of the site, in kWp	Sum of all rated Module STC power

Parameter	Description	Comments
Installation Date	The installation date	Installation Date must be after 1/1/2010, and no later than three months from current date.
Monitored devices	The system type by its components: Optimizers & Inverters, Safety & Monitoring Interface, or Monitoring Combiner Boxes.	This is a read-only field. The data here will match what was defined in the site registration process.
Associated to account	The account to which this site belongs	
Notes	General information of interest about the site	Free text
Site Image	If you upload a site image it will appear in the Site List and in the Dashboard: Click the icon to open a file selection window, and select the applicable image file.	The total size of all uploaded files in the Site Details form should not exceed 4MB.
Installer Logo	If you upload a logo, it will appear on the top right-hand side of the dashboard. Click the icon to open a file selection window, and select the applicable image file.	The image is manipulated to fit in a placeholder sized 300x100 pixels. The total size of all uploaded files in the Site Details form should not exceed 4MB.
Site Location		
Map	Enter the site address or coordinates (latitude, longitude) and press Enter.	A red symbol appears on the map, indicating the site location:  You can drag it and re-set the location to the correct address.
Address 1 and 2	The site address(es)	
City	The city in which the system is installed	
Zip code	The zip code in which the system is installed	
State/Region	The state/province in which the system is installed	
Country	The country in which the system is installed	
Public Details		
Public check-box	By selecting this option, you allow external users to view your system's dashboard data.	
Public name	Choose a Public name, which will be your site's name in the public portal/page.	Useful for privacy considerations
Display	Select if to show the dashboard only or the dashboard and layout.	
Public Address	This field is filled automatically and will link directly to the public site's Dashboard.	This field can be copied and used as a link.
Kiosk Display		
Kiosk	By selecting this option, you and the system owner can share the site's PV performance with visitors through a public display. The web browser refreshes every 5 minutes and shows the site's power production, energy production and environmental benefits, the installer logo and the site image.	Refer to the Setting Up a Public Display of the SolarEdge Monitoring Site Dashboard application note .
API Access		
API Access	The SolarEdge Application Programming Interface (API) allows other software applications to access its monitoring system database for data analysis purposes, fleet management, displaying system data in other applications, etc. Selecting the "I have read..." check-box automatically adds an API Key in this field.	Refer to the SolarEdge Monitoring Server API Guide

Site Details
Revenue
Logical Layout
Physical Layout
Owners

Site Details

guid:

Site name: *

Status: * Enabled

Peak power: * kWp

Installation Date: *

Monitored devices: * Optimizers & Inverters

Associated to account: *

Notes:

Site Image

Select a Site Image

Installer Logo

Select a company logo image

Site Location

Map

United Kingdom

Public Details

Public

Public name: *

Display: * Dashboard only

Public Address:

API Access

I have read, understood and agreed to the [SolarEdge API T&C](#)

API Key:

Site Id:

[Read the API Guide](#)

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Figure 2: Admin window – Site Details tab

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Logical Layout

The Logical Layout tab in the Admin window displays the list of components in the site. This tab allows adding new inverters or Control & Communication Gateways (CCG), and updating replaced components (inverters, power optimizers, CCGs and SMIs) in the monitoring portal.

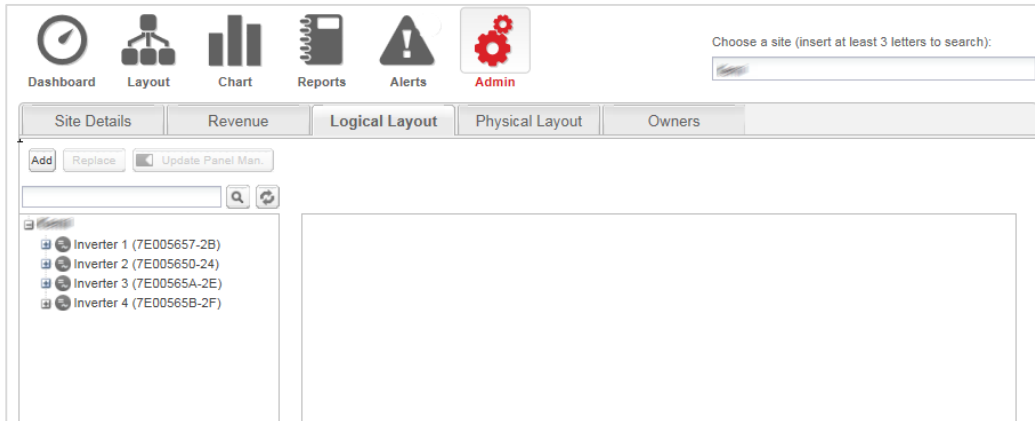


Figure 3: Admin window – Logical Layout tab

Power Optimizers

Power optimizers are added to the logical layout automatically when the inverter starts to communicate with the monitoring server. When a power optimizer is paired to an inverter, the server identifies that it belongs to an inverter in the site, and adds it to the logical layout.

Inverters and CCGs

You can add, search for, and replace inverters/CCGs in the list of site components. The displayed windows are different for sites with SolarEdge inverters and sites with non-SolarEdge inverters (with Safety and Monitoring Interface –SMI).

► To add an inverter or gateway to a site with SolarEdge inverters:

- 1 Select the **Logical Layout** tab.
- 2 Click **Add** and select **Inverters** or **Gateways** or both. A form is displayed.

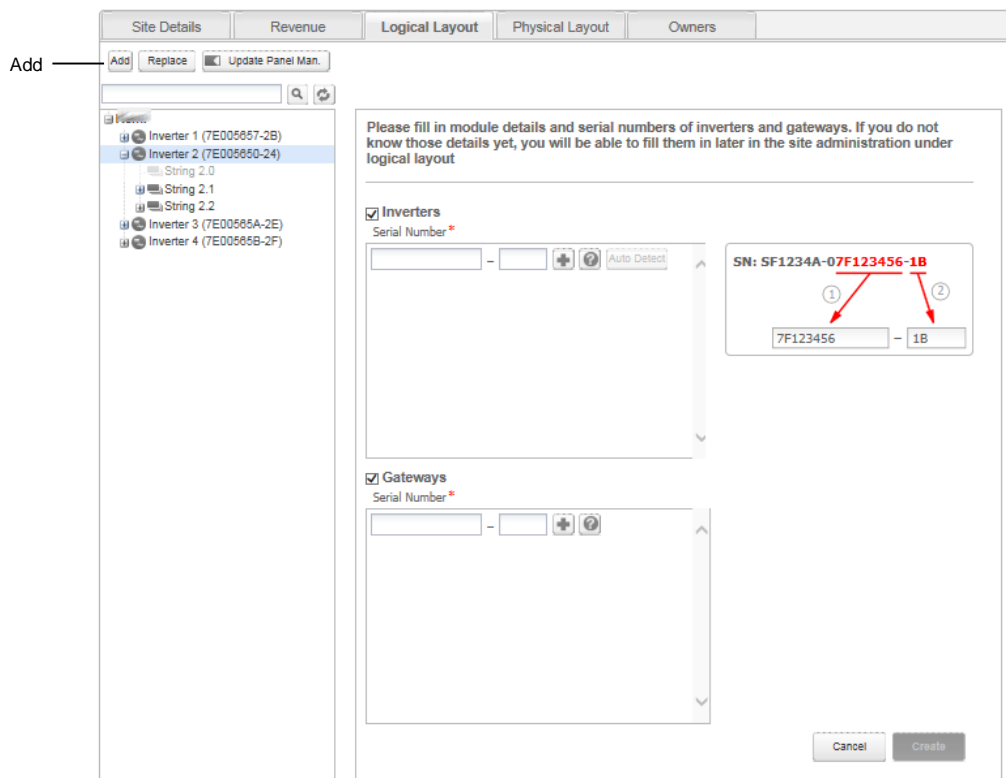


Figure 4: Logical Layout – adding a new inverter

- 3 Specify the serial number for the inverter/Gateway (CCG): Enter the last 10 digits of the device serial number, in the format: XXXXXXXX XX.
For example: if the product serial number is SF0112A-07F123456-1B, insert: 7F123456 1B. The serial number is printed on the device label. The system checks the validity of the value you enter here.
- 4 Click **Create**. The new inverter/CCG appears in the left pane.
- 5 You can edit the inverter/CCG's details. To do so, simply click the inverter/CCG in the list on the left pane and edit it.

► **To add an inverter or gateway to a site with non-SolarEdge inverters (with SMI):**

- 1 Select the **Logical Layout** tab.
- 2 Click **New** and select either **New Inverter** or **New Gateway**. An adding form is displayed. The following shows adding an inverter.

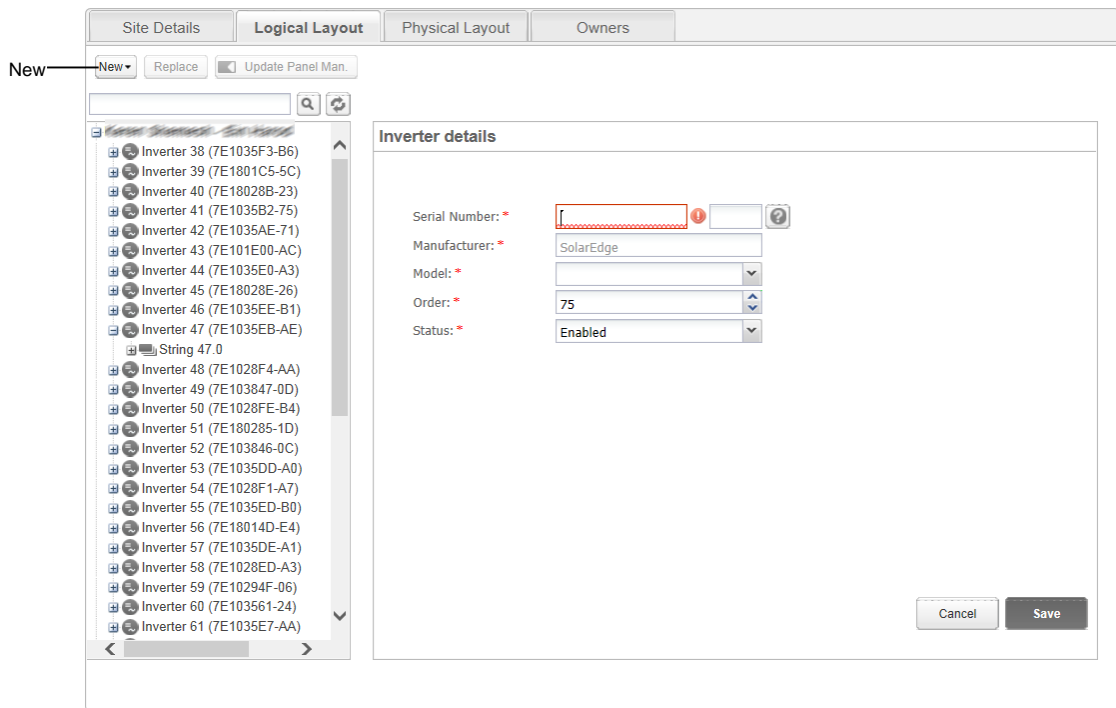



Figure 5: Logical Layout – adding a new inverter

- 3 Specify the following information for the inverter/CCG. All fields are mandatory:
 - **Serial Number:** The last 10 digits of the device serial number, in the format: XXXXXXXX XX.
For example: if the product serial number is SF0112A-07F123456-1B, insert: 7F123456 1B. The serial number is printed on the device label. The system checks the validity of the value you enter here.
 - **Manufacturer:** The manufacturer of the device. The default is SolarEdge.
 - **Model** (only for inverters): Select the model name of the inverter, for example: SE7K.
 - **Order:** Ordinal number of the inverter/CCG within the installation. This value sets the order by which inverters are numbered.
 - **Status:** The status of the inverter/CCG, which can be Enabled or Disabled. Only enabled

components appear in the system layout view (when clicking the Layout icon ). By default, the status is Enabled.



NOTE

Enabled inverters are shown in black and disabled inverters are shown in gray. You can edit a disabled inverter in order to enable it. To do so, simply click a disabled inverter in the list and edit it.

- 4 Upon editing completion, click **Save**. The inverter that you created appears in the left pane.

► **To search for a component:**

A search box is available at the top of the device list, which enables filtering the list.


- 1 Enter an inverter/CCG name or a serial number in the box.
- 2 Click the **Search** icon  to perform a search. The devices that contain the search criterion are displayed in the list.



Figure 6: Logical Layout – Search

- 3 Click the **Refresh** icon  to reset the search filter.

► **To replace a site component in the layout:**

Use this option if you have replaced an inverter, power optimizer, CCG or SMI.



NOTE
If a component is not replaced here, the monitoring system assumes that the previous component still exists and will refer to it as a miscommunicating component.

- 1 Select the **Logical Layout** tab.
- 2 From the list of system components on the left pane, select the component that was replaced (expand or collapse the list as necessary). The component details are displayed in the main pane.

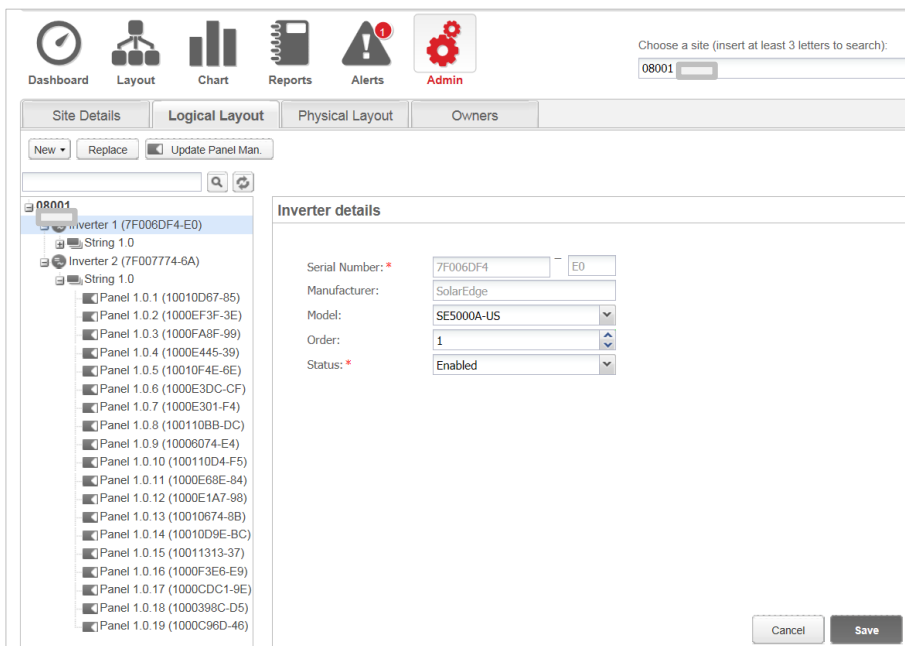


Figure 7: The Logical Layout tab in Admin

3 Click **Replace**. The component details are now divided into two sections: **Current** <component> and **New** <component>.

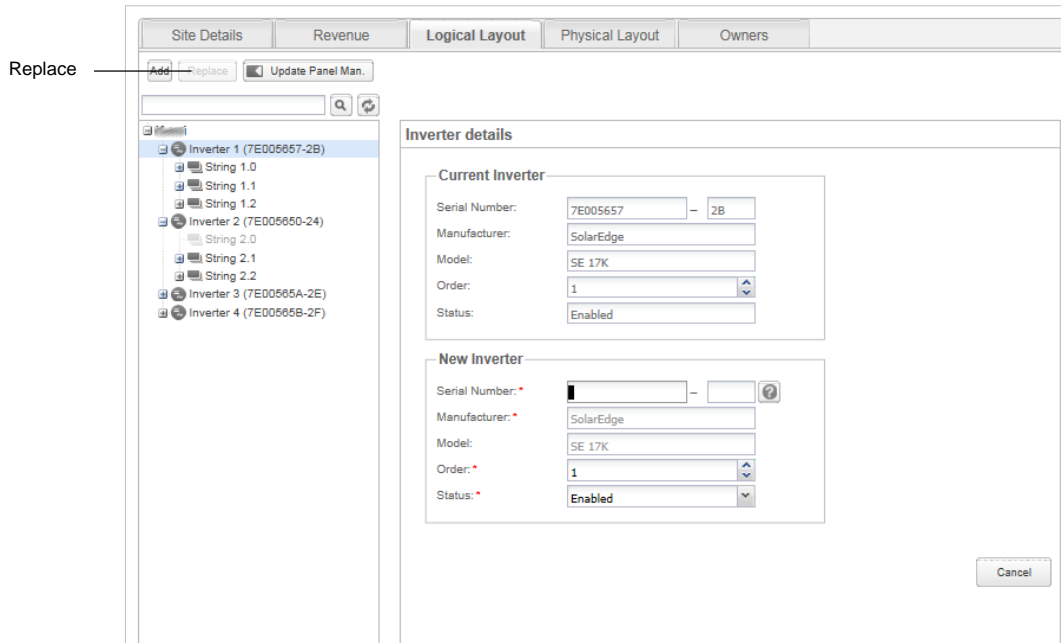


Figure 8: Replacing a system component

- 4 Enter the details of the new component. Keep the same (default) Order number and Status as that of the replaced component.
- 5 Verify that modules are defined in the site. If modules were replaced, update the module manufacturer.
- 6 Click **Save**. The new component appears in the component list and receives the same Order number in the list, if the Order number was kept (for example “Inverter 1”). The replaced component is disabled and is grayed out.

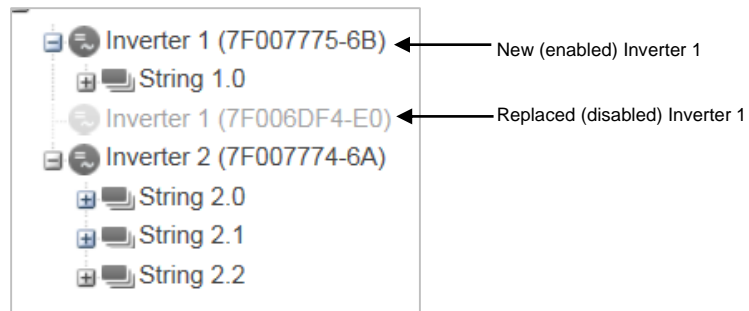


Figure 9: Example of system component list with a replaced inverter



NOTE

If there is a physical layout for this site – after updating the component in the Logical Layout tab the new component will automatically appear in the location of the replaced component.

Physical Layout

The physical layout of the PV system gives a bird's eye view of the actual placement of each component in the site (inverters, modules, etc.). Mapping the physical location of each component in the site is not mandatory, however makes site diagnostics easier and more informative.

The physical layout editor enables creating and editing the physical layout. When the physical layout is complete, you can publish it to the portal, save it as an image and print it.

► **To create and edit a system physical layout:**

- 1 Record the system components' locations and serial numbers in the site, using one of the following:
 - Use the Site Mapper application for mobile devices- after completing the mapping using the application, it will generate an XML file with the physical mapping. If you haven't uploaded the Mapper XML file during site registration, you can upload it in the Site Mapper file field.

- Use the Physical Layout [template](#) - fill out the template using the detachable 2D barcode stickers on each power optimizer. Click [here](#) to see an example. Once the form is complete, scan it and upload it. If you haven't uploaded the scanned template during site registration, you can upload it in the System physical layout template field.
- 2** Create the physical layout: Select the **Physical Layout** tab and click **Create new layout** to start a new layout, or edit/delete a saved or published layout by clicking the corresponding buttons. For information on creating a physical layout, watch these short videos demonstrating how to use the physical layout editor:
- [Residential sites](#)
 - [Commercial sites](#)

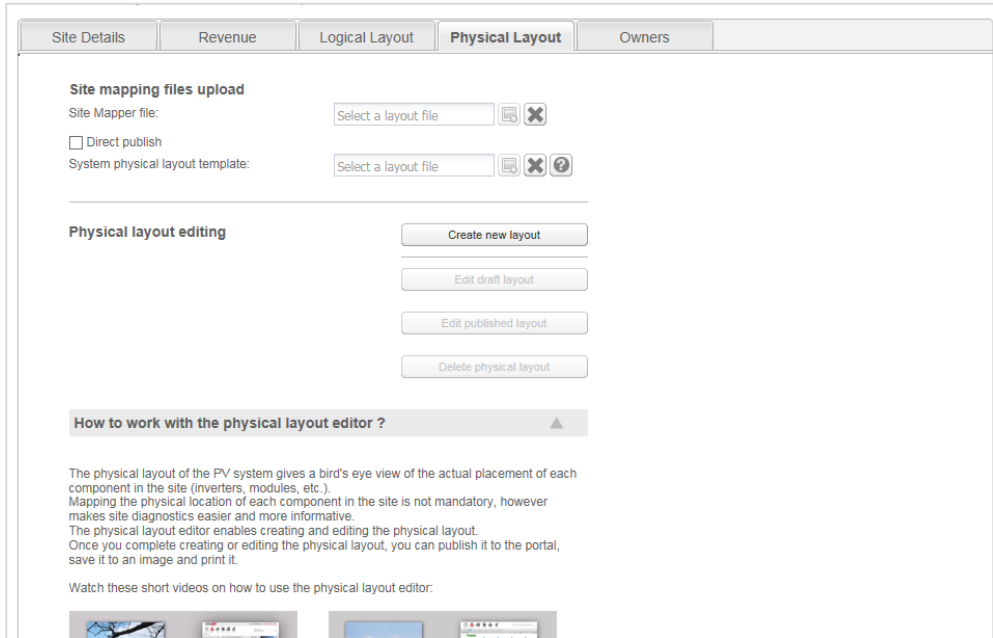


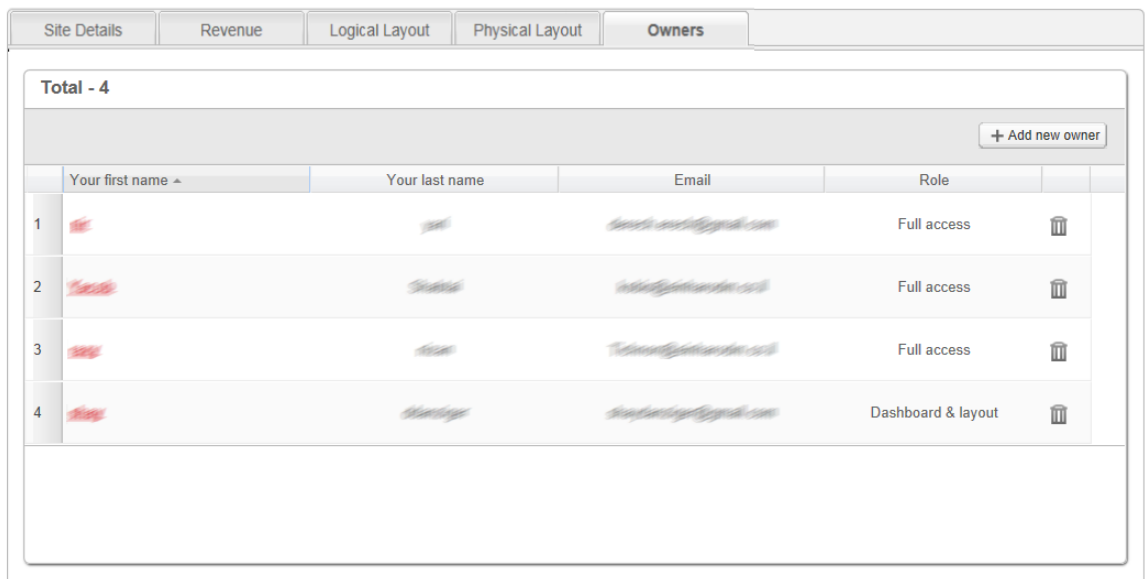
Figure 10: Admin window – Physical Layout tab

Owners

You can define and edit the system owners and their level of access to the monitored site using the Owners tab.

► **To add/edit an owner:**

- 1** Select the **Owners** tab.




2 Click **Add new owner** or select an owner that you want to edit. The following form is displayed:

Figure 12: Owners – Add new owner

- 3** Enter the owner’s e-mail address.
- 4** Select the monitoring portal display language for the new owner.
- 5** Select the new owner’s role:
 - The **Dashboard** role allows the system owner to access to the Dashboard tab only.
 - The **Dashboard & Layout** role allows the system owner to access the Dashboard and Layout tabs.
 - The **Full access** role allows the system owner to access the Dashboard, Layout, Chart, Reports and Alerts tabs.
- 6** Upon completion, click **Save**. An email will be sent instructing the owner(s) how to access and register to the SolarEdge monitoring portal.

► **To delete an owner:**

To delete existing system owners from the owners list, click the  icon next to the relevant owner in the owners list (see Figure 11).



NOTE You cannot modify an owner’s email address, therefore in case editing is required, create a new address and remove the old one.