Quick Start Guide

Vision
The Future of Events

Your cloud-based data hosting solution

|	
Getting Started	Review company information and personalize Vision to match your corporate branding.
Users	Add users, assign them to projects and roles.
Projects	Set up new projects, create compliance graphs, and adjust warning limits.
Units	Assign units to projects and place them on a map.
Event Reports	View event reports and annotate events.

Getting Started

Vision can be customized to your preferred language.

1. Click the drop down in the bottom right-hand corner and select your preferred language from the list.
2. Vision will remember your selection.

You can log into Vision from the top right-hand corner of the landing page.

1. Enter in your user name and password.
2. If you have forgotten your password, you can reset it by clicking on the *Forgot your password?* link. This will send you an email with a new password.
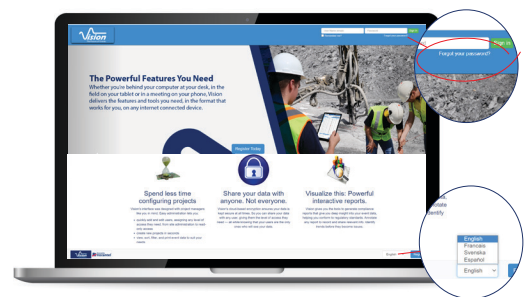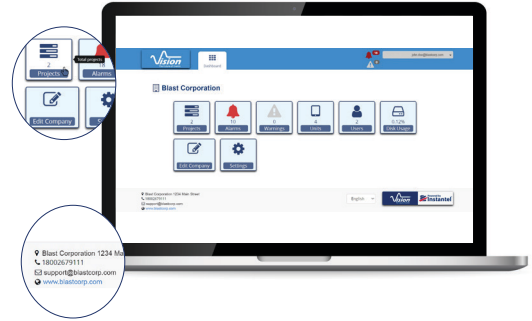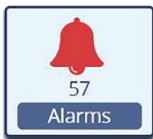
Getting Started

Once you log in, you will see a company dashboard.

Administrator View:
1. Hover over any item and a tool tip will appear.
2. Use the company dashboard for a quick overview of alarms and warnings across all projects.
3. From here, you can quickly access projects, units, users, settings, and more.
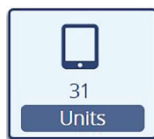

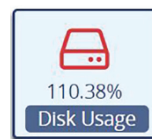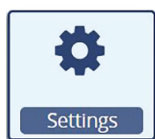|							
11 Projects	**57 Alarms**	**12 Warnings**	**31 Units**	**16 Users**	**110.38% Disk Usage**	**Edit Company**	**Settings**
Total projects; Quick access button to add, delete, modify, and review	*Indicates total event alarms*	*Indicates total event warnings*	*Total units; Quick access button to add, delete, modify, and review*	*Total users; Quick access button to add, delete, and modify access*	*Indicates storage space used*	*Edit selected company information*	*Manage selected company settings*

Read and Download or Read-Only Access View:
1. Your main dashboard opens up to the projects page.
2. For the Read-Only, the user can only see the project, but cannot download any event reports or make any changes.
3. For the Read and Download, the user can see the project and download events, but cannot make any changes.
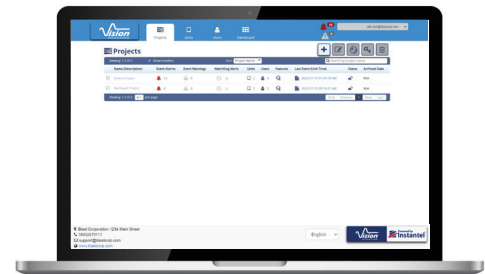
Navigating Back

In any of the quick access links, you can go back to the dashboard from the top menu by clicking on the dashboard button.
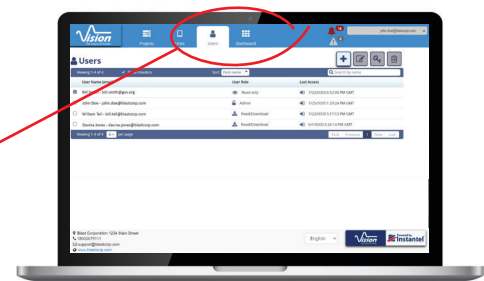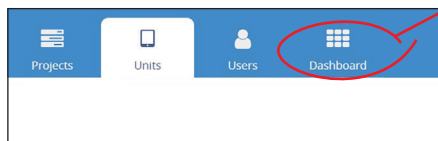
Edit Company

Edit Company - Admin Access Feature

Click the Edit Company icon to change the company address, website, and description. This information is displayed at the bottom of each page in Vision.

1. Enter your company name, address, phone number, description, website, and email address.
2. Click next.
3. Vision integrates with THOR so that events can automatically be forwarded to Vision. To set up integration, enter in a web service user name and password to enter in THOR. This can only be done by an administrator.
4. Click Save when done.
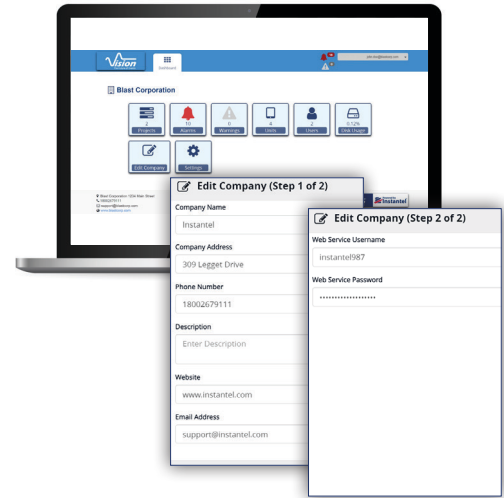
THOR and Vision

Using Vision with THOR makes it easier to provide access to data to external parties and/or teams that are not allowed to access THOR directly.

THOR and Vision will:

- Sort event files into projects based on the serial number of the unit.
- Add units to projects by serial number after the project is created.
- Maintain unit location and project histories in Vision.
- Allow movement of units from one project to another, without affecting historical data.
- When using Vision with THOR, email notifications will be sent by THOR as units are performing ACH into THOR.
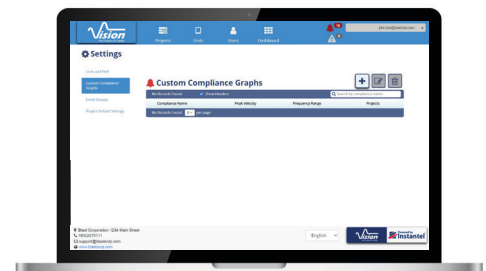

Settings

Settings - Admin Access Feature

1. Click the icon to change the logo displayed at the top of each page.
2. Change the colours of the website to match your corporate branding. You can change the colour at the top banner as well as sub menu backgrounds.
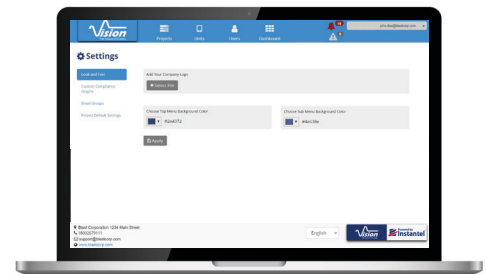

Settings - Create Custom Compliance Graphs

1. In the left menu, select the Customer Compliance Graphs option.
2. Enter in a peak velocity and a frequency range. This will create a straight line at the peak velocity across the frequency range.
3. Apply the custom graph to the desired project(s).

Settings - Create Email Groups

1. In the left select the Email Groups option.
2. On the top righ-hand side, click on the + to add a new group. Enter the group name in the field * Email Group Name.
3. Select contacts from the drop-down list or add a new contact by selecting the *New Contact?* link.
4. Click on the Save button to save your progress.
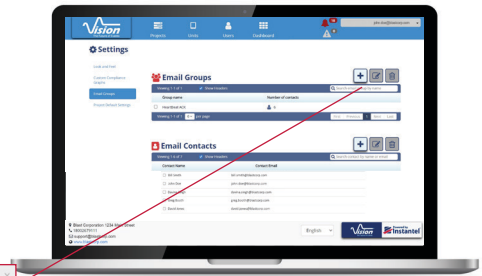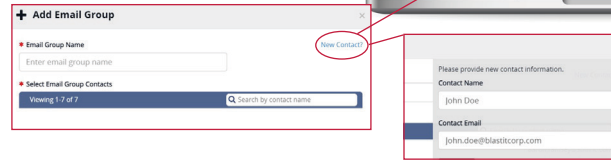
Settings - Edit or Delete Email Groups and Contacts

1. In the left menu, select the Email Groups option.
2. Click on the group or contact to be edited or deleted. Note: these options are not available unless a group or contact is selected.
3. Click on the Edit ✏ button to edit the group or contact. The Edit button will allow you to change a contact's information or to add a contact to an email group.
4. Click on the Trash Can 🗑 button to delete a group or contact. *Note: this action cannot be undone!*
5. Click on Save to save entries.
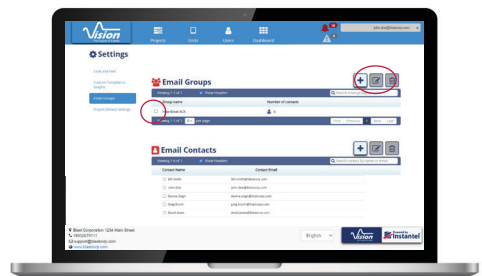
Settings - Project Default Settings

1. In the left menu, select Project Default Settings. Default settings will be applied to all projects unless changed in the project set up (See: **Adding Projects - Step 4**)
2. In this section, you are able to:
   - Define the general settings for measurement (metric/imperial), the type of compliance graph (select from drop-down list), and the units for weather (celcius/fahrenheit).
   - Set the Auto-Call Home settings
   - Create your report settings
   - Define your email settings
   - Set up Auto-Call Home Watchdog
3. Click on Save to save default settings.
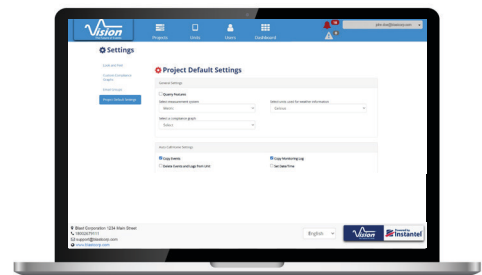
Adding Projects - Admin Access Only

Step 1

1. A new project can be created by selecting the plus (+) button in the top right-hand corner.
2. Enter the site address of the project. This will be used to pull weather information at the time an event is recorded.
3. Set the compliance graph that will be applied to events in this project, as well as the warnings and alarm limits.
4. Select the units of measure and weather information to be displayed on events and event reports.
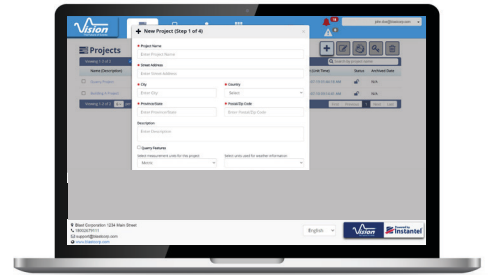
Step 2

1. Add units to the project by selecting the *New Unit?* hyperlink (see: **Adding New Units** for detailed instructions.) In the sample image, no units have been added yet, therefore, none display.
2. Units can be added at a later time by selecting the Unit tab.
3. Click next to go to the next step.
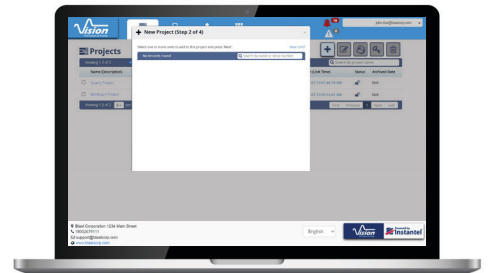
Step 3

1. Add users to the project. These users will have previously defined access to the project. The next time they log into Vision, this project will be displayed in their list of projects.
2. Note: Once the project is set up, units must be added in order for any new events received to automatically associate to the project.
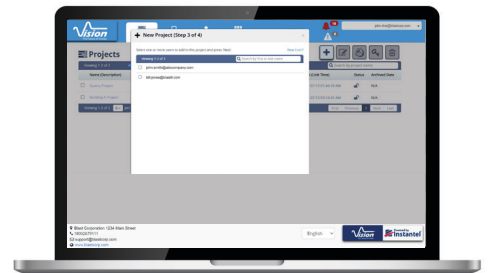
Step 4

1. Configure Auto-Call Home settings, report settings, and email settings.
2. Press "finish" to save and add project.
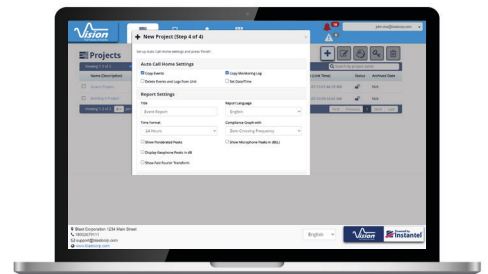
Important: If the quarry feature is not needed for a project, leave it unchecked.

The Quarry feature should only be enabled if a vibration monitor is used for quarry blasting. The event will not be visible to users with Read and Download access unless a blast is created and events are attached to a blast.
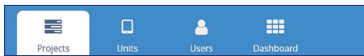
Project Navigation

Navigate through a specific project with the tool bar on the left-hand side of the screen.

- **Manage Projects:** Return to project list
- **Manage Project Units:** A list of the units assigned to the selected project.
- **Manage Users:** A list of the users assigned to the selected project.
- **Quarry blasts:** A list of blasts.
- **Custom reports:** Admin access only.
- **Events:** All the events assigned to the project.
- **Maps:** View the project units on a 3D or street map.
- **Images:** View pictures assigned to the project.
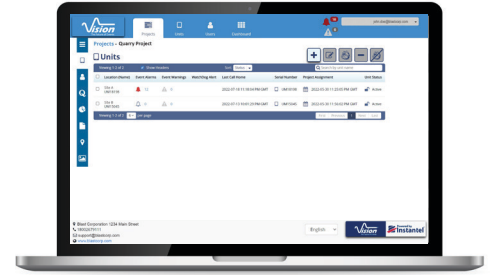
Exit Project

Use the toolbar at the top to quickly access other projects, all of the units, and users, or return to the main dashboard.

Adding Images to a Project

Use the side project navigation menu to add images to a project. Images can include site setup or maps. Any .png, .jpg, or .jpeg file can be uploaded and a desription assigned.

Trench

Rock Face Drilling
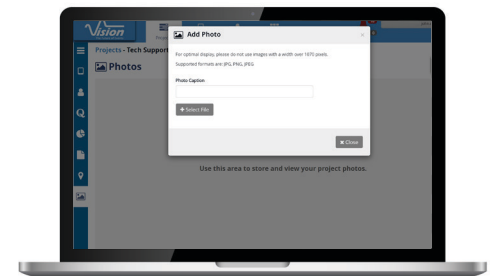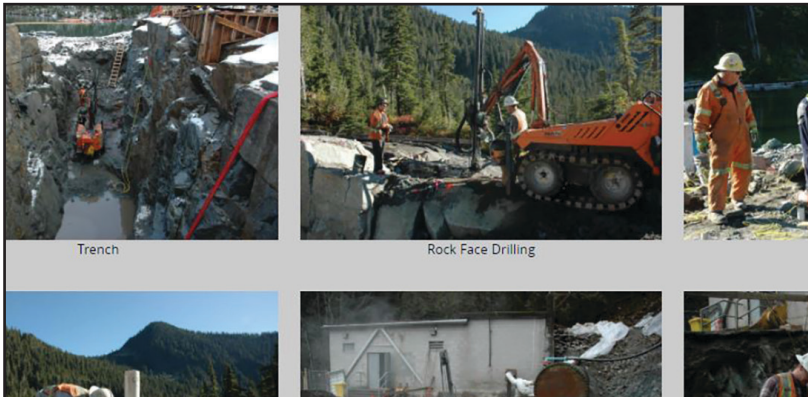
Users - Admin Access Only

1. Under the User option on the dashboard, people can be added and given access to defined projects.
2. Each user can be assigned one of three roles:
   - *Read-Only*: The user can log in and see the project, but cannot download any event reports or make any changes.
   - *Read and Download*: The user can log in and see the project and download event reports, but cannot make any changes.
   - *Administrator*: An administrator can access projects and download event reports. They can also add and manage new users, edit projects, and edit company information.
3. Once a user is added to Vision, they will receive an automated email. It will include their login information and a temporary password.
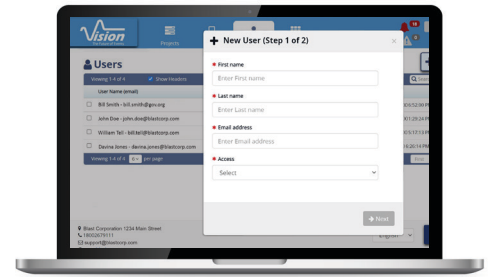
Users - Resetting a Password

1. Under the User option on the dashboard, select your user name.
2. Click on the **key** ✎ to reset the password.
3. Once the password has been reset, the user will receive an automated password with their new login information.
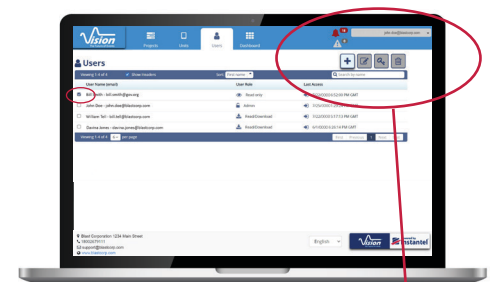
Users - Changing a Password

1. A user may change their password after they log in.
2. Click on the arrow beside the user name.
3. Select ✎ **Change Password**. You will be prompted to enter the original password, the new password, and a confirmation of the new password. Both new passwords must match.
4. Once the password has been reset, the user will receive a notification that the password has changed. It will include their login information and the new password.
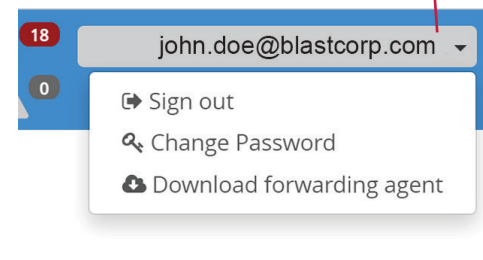
Units - Admin Access Only

Units can be added while in a project or by selecting the unit tab.

Adding Units with the Units Tab

1. Click on the plus (+) button in the top right-hand corner. If units have already been added, they will display on the unit listing and in each project list where they are assigned.
2. Add a unit name and location to easily identify each unit.
3. Add the unit serial number.
4. Click save to enter the unit information.
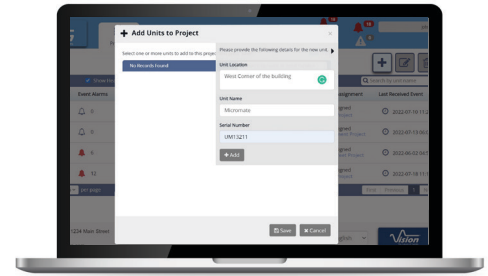
Adding Units from the Projects Tab

1. Units may be added while opening a new project by selecting the *New Unit?* hyperlink.
2. Repeat the above steps to complete adding the unit.

### Understanding Unit Information

1. The units tab shows a list of units and which project they are assigned to.
2. Each unit will have the following information:
   - The unit location
   - Any event alarms or warnings
   - The date the unit was assigned to a project
   - The unit status
3. Once a unit is archived, it can be assigned to other projects. The history of the unit is maintained and the date the unit was archived is displayed beneath the assigned date.
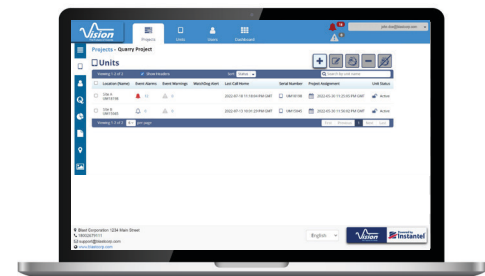
Adding Units onto Maps

After a unit has been added to a project, it can be placed on a 3D, street map, or your image overlaid map.

1. To select the desired map, select the Map tab and choose the desired viewing option.
2. Enter the site address and click the save button.
3. Place the unit on the map in its exact physical location with Google Maps. (If someone needs to be sent on site, they can use the map to reference the unit's location.)
4. Select the plus (+) button on the top right-hand menu.
5. Choose a unit from the drop down list.
6. Click on the preferred location on the map to add the unit. Once added, it can be dragged to a specific location.
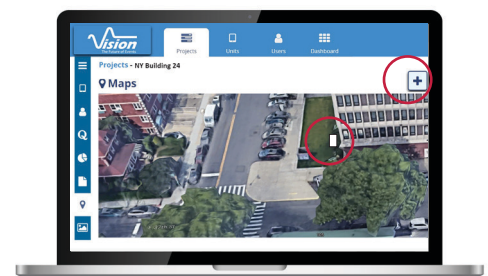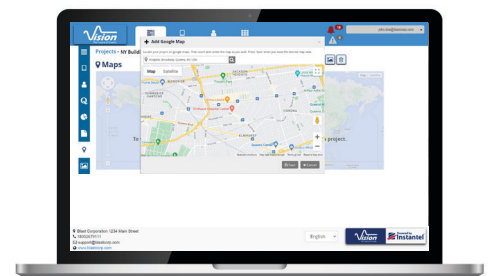
Unit Event Reports from Maps

1. Double-click on the unit icon on the map to see a trend of the last five events recorded.
2. The event report displays the serial number, the date the event was recorded, and the weather information from the time it was recorded.
3. From this view, you can view the PDF, print, or download the event report. The available options are dependant on the user's access rights (i.e. if the user has only Read Only priviledges, only the view PDF option would appear.)
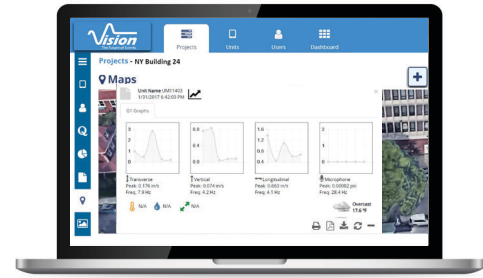
Unit Event Reports from Projects

Events can be viewed or downloaded as a PDF or .csv file. Each project will have a complete list of events that have occured.

1. To view the event, click on the Events tab on the side bar menu. A list of events will appear.
2. Each event shows the date of the event, the serial number of the unit that recorded it, and the type of event (waveform or histogram.)
3. Alarms and warnings are displayed by channel. Hover over the channel to view the velocity and frequency at which the alarm or warning first occured.
4. Scroll to the right to view the Peak Particle Velocity (PPV) and zero-crossing frequency for each channel.
5. Use the gears in the bottom right-hand corner to select the information you would like to see in the event table. (View as much or as little as you prefer.)
6. Event data can be displayed by sensors or channel. Sensor check results may also be displayed.

Unit Event Warnings and Alarms

1. Warnings and alarms can be cleared by selecting an event and clicking the bell 🔔 button.
2. To delete the event, select the event and click the trash can 🗑.
3. To view an event, select it by clicking on the the project name. This will open to a screen of all units available on this project.
4. Click on the page 📄 icon to open all project events. From the top navigation menu, print, export to CSV, or view the the report PDF.

Unit Event Compliance Reports

1. When viewed as a PDF, an event report can be annotated.
2. You can highlight sections, add notes or draw freehand by selecting the action buttons at the bottom of the PDF:
   - Highlight: allows certain sections to be highlighted for a client.
   - Create Note: will allow you to add text to the report, point to a specific area, or block off a specific area.
   - Strikeout: will allow you to cross out any data you don't want seen.
   - Draw: will allow you to choose a color and add a freehand object.
3. Any changes will be saved automatically in the event report so that others may view the notes.

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