Training Outline

Manager Training

Informationals – Located in the left side menu found by clicking on the 4 horizontal bars in the upper left corner

- Releases – Contains release notes for all major update releases
- Reports – Contains information on subscriptions statuses for devices and their billing information. Reports can be exported as CSV for easy filtering and sorting in a spreadsheet.

Operational – Located in the upper right corner of the manager page

- + sign – Used to add new entities such as Partner, Account, User, and Staff
    - Partner – highest level of division for separating accounts (Corporation - ex. McDonalds)
    - Account – Further level of division under Partner (Franchises – ex. Bob's McDonalds, Frank's McDonalds)
    - Staff – Used to create new accounts to access the management interface for dealers/integrators
    - User - Creates a user account for logging into the video/access control interface for end-users
- [search] icon – Search icon to look up information
    - Video Devices – Main search for video devices (gateways and C2C)
    - Cameras – Used to search for a specific camera connected to a device (provides setting information only and does not allow change of settings)
    - Access Controllers – KT-1 controllers will be listed here for management
    - Mobile Access Credentials – Contains information on user credentials created for access control
    - Mobile Access Devices – Kantech IoSmart readers being used with mobile credentials

New install instructions

- Create a partner for the client to indicate their company
- Create an Account underneath the previously created partner. Many cases will only have a single account per partner but if there are divisions in the company the account can be used to create those divisions.
- Search for the Account and select it to open its details page.
- Click on the Add New Location button to create the installation site location information
- Search for the device using the appropriate device information and select it to load the details
    - Edit the device to change the name, partner, account, and location previously created

- Add users to the device. You can add existing users if already created for a previous installation or you can use the Add User form when clicking on the + sign to create a brand new user account.
  - Administrator – Reserved for installation tech/dealer level access
  - Enterprise – Admin for the end-user (all rights except for subscription management)
  - View Only – Access to live video and archives but can not change settings
  - Live Only – Access to live video only
- For C2C devices once the users are added simply set the subscription level for the camera in its details page in manager. You are now ready to login to the user interface to customize the view and operation of the device.
- For gateways you will need to login to the user interface and add the desired cameras to the gateway. Once the cameras are added you can then set the subscriptions for each camera in the management interface. Anytime a new camera is added or one is removed/re-added you will need to set a subscription or the service for the entire device will de-activate.

Installation Training

Video Device Installation Steps – Covers C2C and gateway setup
- Login to the cloudvue.com user interface
- Select appropriate account if access to multiple when logging in
- Click on the Views tab on the left hand side of the page and then select the device to configure
- Click on the Settings icon in the right hand menu pane
- Select the Devices tab to manage your camera(s)
  - o For C2C you will have access to the camera settings to configure video quality, motion detection, and other analytics
  - o For gateways you will need to add the cameras into the device by either Scan for Devices or Add by IP Address
    - Scan will look for any camera broadcasting its presence on the network. If there is a custom username/password on the camera it will error on first attempt and then prompt to enter the credentials for authentication
    - Add by IP is useful if the network is blocking the scan protocol or if a custom driver such as OnVif is needed due to the direct model not being integrated
    - Once cameras are added you will then be able to adjust the various video settings available for that model
- Creating a custom recording schedule - select the Schedule tab (not required if customer wants 24/7 recording as that is the default setting) (multiple schedules can be created for different recording types during different times of day as well as per camera configuration if needed)
  - o Record – 24/7 recording to all configured storage
  - o Motion – Motion only recording to all configured storage
  - o Local Record, Cloud Motion – 24/7 recording to local storage with only motion clips being backed up to the cloud
  - o Local Record, Cloud People Detection - 24/7 recording to local storage with only motion clips that detected people being backed up to the cloud
  - o Local Record, Cloud Vehicle Detection - 24/7 recording to local storage with only motion clips that detected vehicles being backed up to the cloud
- Creating Alerts
  - o Select the Account option from the right hand menu
    - Select the Schedules tab
    - Click on Add Schedule -> Add Alert Schedule
    - Give the schedule a name and then set the different time intervals this schedule needs to cover
  - o Navigate back to the device settings by clicking on the Settings icon (make sure the correct device settings load, if not click on the Live option from the right menu then select the device from the list of Views on the left before clicking on the setting icon again

- o Select the Alerts tab
  - ▪ Click on Add Alerts and fill out the form based on the desired type of alert and who/how it should be received (SMS and e-mail delivery of alerts)
  - ▪ Alert Types –
    - • Camera Connect – Reports when an inactive camera connects to the network
    - • Camera Disconnect – Reports when an active camera disconnects from the network
    - • User Login – Reports when any user logs into the interface for access to the video platform
    - • Motion – Reports motion activity (e-mail will contain snapshot of event)
    - • Recording Start – Reports when recording starts after being stopped by schedule
    - • Recording Stop – Reports recording has stopped as directed by a schedule
    - • Device Offline – Reports anytime the device loses its online status for longer than 1 minute
    - • Device Online – Reports when the device reconnects online after an outage
    - • Device Access – Reports when a specific device from an account is accessed versus just when someone logs in.
    - • Upload Not Complete – Used when an upload schedule is created for cloud backup. Lets user know if there was not enough time allocated to finish the upload during the created window.
    - • Disk Full – Reports when the hard disk that stored video locally starts to go above the threshold for the overwrite process of video (can indicate an issue with storage blocks on the drive that can sometimes be fixed remotely)
    - • People Detection – Reports when motion is detected to be caused by a person
    - • Temperature – Works specifically with the illustra thermal camera to report temperatures outside of specified threshold
    - • Vehicle Detection – Reports when motion is detected to be caused by a vehicle
    - • Device Error – Reports if any disk errors or system errors occur so proactive steps can be taken before a critical issue
- • Add additional users
  - o Select the Users tab inside the device settings (device name appears in upper right corner of interface for confirmation on which device is selected)
  - o Click on Add User
    - ▪ Fill out the required fields and select the devices/views the user should have access to by selecting the appropriate boxes

- Enterprise – Admin for the end-user (all rights except for subscription management)
- View Only – Access to live video and archives but can not change settings
- Live Only – Access to live video only
- Default View – Allows you to select a specific device or custom view to load upon login (Default – Last Viewed – takes user back to last site visited)
- Allow Mechanical PTZ – Setting for Live and View only users to restrict access to PTZ controls. When unchecked the user is unable to control PTZ cameras
- Installation Finalization
  - Make sure customer has login access and correct subscriptions have been set on the cameras
  - Provide customer with tutorial covering adding users and basic features
    - Help Menu is available in the user interface with video tutorials covering many features

Access Control Setup – Kantech IoSmart reader
- Once reader is updated and powered on the technician will login to the Cloudvue mobile app with their user credentials
  - Click on the + sign in the app and select Add Mobile Access Device followed by pressing the Scan button
  - The readers serial number should be displayed here if detected in range (you will see the same serial number that is listed on the unit followed by 4 digits)
  - Take note of the serial number (case-sensitive) and then login to the user interface on a PC
  - Select the Account icon from the right side menu
    - Confirm the proper location has been created under the locations tab if not create the location before proceeding
    - Select the Devices tab, click on Add New Device -> Add Mobile Access Device
      - Here enter in the information and rules for the readers configuration
        - Panelless – stand alone reader with no controller
        - Panel Based – reader is paired with a controller for rule management
    - Select the Holidays tab
      - Click Add Holiday
        - There are 4 blocks of Holidays that can be created. (H1, H2, H3, and H4) that can be allocated as desired i.e. (local, state, federal, and other holidays)
      - Click Add Schedule -> Add Access Schedule

- Intervals can be created to cover various days/times that user is allowed to access the door and holidays can be set based on what is observed for that user
- Click on Templates
    - Here you can pre-assign specific doors and schedules to be used for groups. With this method you do not have to individually configure each door and schedule per credential. Instead you simply select the Template when creating the credential to auto assign the specified sites/access schedule.
- Click on Credentials
    - 2 test credentials are allowed before a subscription has to be created. Once subscriptions are set in the management interface click on the Add Credential button here.
    - Fill in the information for the user and select the appropriate type of Mobile Access
        - Mobile Credential User – Use with IoSmart reader connected to a controller
        - Mobile Smart Key User – Use with IoSmart reader in stand alone mode with no controller (phone holds controller rules and syncs any changes logs)
        - If using a Cloud connected controller and you want to use Keycards. Click on the Options tab in order to input the physical card information for the user
        - Select the Access Template for the credential level or Click on Assign Custom if not using a template.
            - Select the access schedule for the desired readers and then press the + sign to add them to the list of assigned devices
    - Text message will be sent to phone number entered for the created credential to validate the phone number and provide instructions for downloading the access app.
- Adding cameras to access control
    - Select the desired access device from your list of Views and then click Settings
    - The last option under the configuration section contains the option to assign any cameras on the customers account to be tied in with the access events. (2 cameras can be selected per reader)

User Training

Views tab on the left opens menu to select desired device or view.
To edit settings you must select an actual device and not a view.
Custom Views can be created by selecting the Views tab inside the Account menu
- Here you can combine multiple cameras into a single view or restrict the cameras from a gateway a user has access to

MotionView – Located in the upper left of the interface click to toggle the feature on/off
- Will only display cameras seeing motion activity
- When motion activity is seen cameras will pop into view and stay visible on the page for roughly 15 seconds after which we declare the motion event over unless continued motion is observed.
- This allows for hundreds of cameras to be put into a single view and the only ones you will see are the ones where actual activity is occurring so focus can be given to views with actual activity.

Layout – Preset layouts to customize size of certain camera previews

Event List – Displays analytics detected by the system and allows for quick playback and saving of video clips associated with the event (search of events in the list and the ability to download a CSV or PDF of the event information is available)

Archive icon – Icon will take you to the newest archives for a specific camera if the icon on that cameras preview is clicked. If the icon on the right hand menu is selected you will load into archives but video will not load until the desired camera is selected from the dropdown menu.
- Features
  - Date/Time – Select a specific date/time to start reviewing video
  - Events – Filters events on the timeline so only desired information is displayed
  - Save Clip – Allows for saving of video to the default download folder for the clients browser
    - Clip Length (1 minute, 5 minutes, 15 minutes, and custom which allows up to a 120 minute clip)
    - Filename – generic naming that can be changed before saving for easier referencing later
    - Save to Cloud checkbox – This option saves the video in the cloud for as long as the subscription is active.
      - When this is selected a required Bookmark comment field will appear in order to add tags so the file can be searched later
  - Bookmarks – Allow you to tag a video clip for quick reference but does not flag the video for retention so it will be overwritten over time
  - Playback Settings –
    - Minutes or Hours – Adjusts the timeframe seen on the timeline for faster or more accurate scrubbing or video
  - Search – Search for bookmarks/saved clips
    - Text entry field to search for specific tags

- Dropdown menu allows browsing of all bookmarks
- Once appropriate bookmark is selected click Go To in order to load the bookmarked video

- Playback icons in top right of video playback
  - Cloud symbol indicates the video is being played from cloud storage if the video is coming from local storage that icon will not be present
  - \+ sign is for advancing the digital zoom
    - Once zoomed in you can click and drag on the archive image to change the focal area
  - \- sign is for retracting the digital zoom
  - The camera icon performs a native resolution snapshot so the client can get the same picture quality as the camera instead of taking a screenshot and being restricted to the computers display resolution. i.e. a 4k camera will download a 4k picture so there is no loss of pixels.
  - Lastly is the Pause symbol so that video can be paused at any time in order to quickly take a picture or add bookmarks at specific points in time

HyperView – Provides a 24 hour timelapse video
- Clicking the icon on an individual cameras preview will load the HyperView for just that camera
- Clicking on the icon in the right hand menu will load the HyperView for all cameras in your current view up to 100 cameras at a time (the more you load the longer it will take to compile)

Intelligence – Provides insight into analytic events detected by the cameras
- Motion – Displays all detected motion events
  - Can select up to 4 cameras to compare
  - Clicking on a cameras graph line will load previews of the motion events for the hour timeframe around where the line was clicked
  - Previews can be clicked in order to jump directly to the timeframe shown in archives so that you can instantly review the video pertaining to the event
  - Available on all video devices
- People Detection – Enhancement for motion detection so only motion caused when a person is present will be tagged
  - Can select up to 4 cameras to compare
  - Clicking on a cameras graph line will load previews of the events for the hour timeframe around where the line was clicked
  - Previews can be clicked in order to jump directly to the timeframe shown in archives so that you can instantly review the video pertaining to the event
  - Available on all video devices
- Vehicle Detection – Enhancement for motion detection so only video with a vehicle present is tagged

- Can select up to 4 cameras to compare
- Clicking on a cameras graph line will load previews of the events for the hour timeframe around where the line was clicked
- Previews can be clicked in order to jump directly to the timeframe shown in archives so that you can instantly review the video pertaining to the event
- Available on all video devices
- Heat Maps – Analytic that displays motion concentration over a specified time period
    - Only available for cameras connected to gateways
    - Select desired camera
    - Select start date/time
    - Select Time Range to analyze i.e. start time of 8am with a time range of 1 hour will show where movement was detected the most from 8am-9am for that view and displays it color coded for review (Dark Blue – little to no motion detected, migrating up to Dark Red – a lot of motion was detected in the area)
- Other – There are other analytics available if illustra Pro models are used. This requires the analytics be configured in the cameras interface when in use with a gateway. We can then display the information in graph form for those events as well as creating/sending alerts based off the events detected by the cameras\

MapView – Displays all locations worldwide on a Google Map
- Status indicator pins
    - Green – Site online
    - Yellow – Site needs attention (cameras not added or one has disconnected)
    - Red – Offline
    - Additionally you can click on a pin to load a quick live preview video of the site

SiteView – Floorplan layout tool to show camera coverage of a facility
- Ability to upload multiple floor plans
- Place camera icons on floorplan and assign live camera views

Account – Contains general account information
- Settings – General account information and access control subscription details
- Locations – Displays and allows adding of additional installation sites
- Devices – Lists all devices assigned to the account for quick management
- Views – Create and modify custom views
- Schedules – Access control and Alert schedules are created here so they only have to be made once and then can be used on any device assigned to the account

- Holidays – Create holiday blocks H1, H2, H3, and/or H4 in order to modify how a schedule acts during specific dates
- Actions – Used with KT-1 controllers to schedule recurring actions
- Templates – Ability to save specific access control rules to be assigned to a group of credentials
- Credentials – Users who need access via mobile credentials or keycards

⚙ Settings - Opens up the settings for the selected device

❓ Help - Built in help menu with direct link to submit a ticket to our support team
- Video tutorials cover many aspects of the platform so users and installers can quickly get walkthrough instructions on various topics