

Site Administration in the Monitoring Platform - User Guide

Revision History

- Version 2.0, April 2024: Updated images and text
- Version 1.0, February 2015: Initial Release

Contents

Overview	1
Log in to Admin on the Monitoring Platform.....	2
Site Details.....	3
Site Access.....	3
Users	3
Access Control	5
Public Access.....	6
Kiosk View	6
API Access	7
Access to Performance Ratio Chart by Site Users.....	7
Associated Accounts.....	7
Logical Layout	8
Remote Settings.....	12
Grid Settings	12
Firmware Update.....	13
Energy Manager.....	13
Revenue.....	14
Performance	15
Inverter kWh/kWp	15
Estimated Energy	16
Performance Ratio.....	17

Overview

This document describes how to view and edit your site’s administration within the **Admin** view on [SolarEdge’s Monitoring platform](#).

























NOTE

Editing in the **Admin** view is only possible if you have account manager user permissions. Refer to the [Monitoring Associated Accounts Application Note](#) for further information.

Admin view in the Monitoring platform includes the following settings:

Admin View Settings	Action
Site Details	Site Details enables you to edit site parameters, and includes the following

Admin View Settings	Action
	sub-settings: <ul style="list-style-type: none">  Details  Address  Contact info
Site Access	Site Access enables you to edit who has access to the site, and includes the following sub-settings: <ul style="list-style-type: none">  Users: Manage and add site owners and site users.  Access Control: Provides access for site users. <ul style="list-style-type: none">  Public Access  Kiosk View  API Access  Access to Performance Ratio Charts by Site Users  Associated Accounts: PV sites registered and managed on the SolarEdge Monitoring platform can be accessed and monitored by third parties.
Logical Layout	Logical Layout enables you to add, replace, and update your systems components. <ul style="list-style-type: none">  Add   Replace   Update 
Remote Settings	Remote Settings enables you to perform remote updates for inverters on your PV site, and includes the following sub-settings: <ul style="list-style-type: none">  Grid settings  Firmware Update
Energy Manager	Energy Manager enables you to apply a battery profile to a site.
Revenue	Revenue enables you to configure the revenue calculation for a site.
Performance	Performance enables you to do the following: <ul style="list-style-type: none">  Inverter kWh/kWp: Present peak power normalization.  Estimated Energy: Activate a comparison between estimated and actual performance.  Performance Ratio: Edit the settings of the Performance Ratio (PR) value. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  NOTE You can only edit the PR value settings for sites that have sensors ins service has been purchased. </div>

Log in to Admin on the Monitoring platform

1. Log in to the [Monitoring platform](#) with your username (email address) and password.

2. To access your site, click the **SITE NAME**.
3. Click the **Admin**  view.
The **Admin** menu is displayed.

Site Details

Site Details lists all the site parameters that can be entered when registering a site. You can edit or add details at any time. If the site does not have a valid location or is not marked on the map, fill in a location on the map before making any further edits. For more information on how to edit or add details to your site refer to [Creating a new Site on the Monitoring Portal Application Note](#).

To edit Site Details:

1. From the **Admin** menu, click **Site Details**, then select from the following options:
 - Details
 - Address
 - Contact Info
2. Enter the information in the fields provided, click **Save**.
Your updated information is saved.

Site Access

In **Site Access** you can do the following:

- Edit who has access to the site.
- Edit the permissions the site user has in the Monitoring platform.
- Edit the views the user has access to.
- Edit the accounts that are associated with each site.

Users

Users in the Monitoring platform enables you to do the following:

- Add, edit, and delete site users and site owners.
- Edit the permission level the site user has in the Monitoring platform.

The following are permission levels:

- **Dashboard:** allows the system owner to access the dashboard.
- **Dashboard and Layout:** allows the system owner to access the dashboard and layout.
- **Full Access:** allows the system owner to access the dashboard, layout, charts, reports, and alerts tabs.

To add a new user:

1. From the **Admin** menu, select **Site Access>Users**.
Users is displayed.
2. Click **+Add New User**.
New User is displayed.

The screenshot shows the 'New User' form in the SolarEdge Monitoring Platform. The form is titled 'New User' and includes the following fields and options:

- Email:** A text input field.
- Language:** A dropdown menu with 'English (US)' selected.
- User Role:** A dropdown menu with 'Site User' selected.
- Monitoring Access:** A dropdown menu with 'Dashboard' selected.
- Device Control Access:** A dropdown menu with 'None' selected.
- Expose to alerts notifications:** A checked checkbox.

At the bottom of the form are 'Cancel' and 'Save' buttons. The left sidebar shows navigation options like Site Details, Site Access, Users, Access Control, Associated Accounts, Logical Layout, Remote Settings, Energy Manager, Revenue, and Performance.

3. In the following fields add the new user's information:



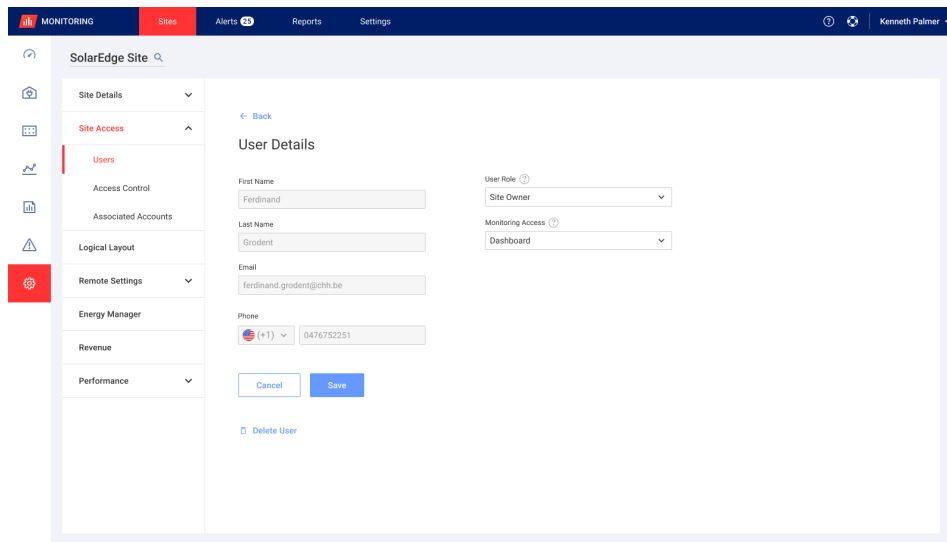
NOTE

If you have a smart home device the **Device Control Access** field is also displayed.

- Email
 - Language
 - User Role
 - Monitoring Access
 - Device Control Access
4. To enable the new user to view alert notifications, select the **Expose to alerts notifications** checkbox.
 5. Click **Save**.
Your new user information is saved on the Monitoring platform.


To edit a site user's details:

1. On the **Users** list, click the name of the site user whose details you want to edit.
User Details is displayed.



2. In the **User Role** field, edit the user's role.
3. In the **Monitoring Access** field, edit the user's site access.
4. Click **Save**.
Your edited details are saved.
5. To go back to **Users**, click **Back**.
You are back in **Users**.

To delete a User:

1. Under **Users**, choose which user to delete and click .
2. You receive a message asking you to confirm you want to delete the user, click **Yes**.
The user is immediately deleted from the list of users.

Access Control

Access Control allows you to control the level of access to your site.

To edit Access Control:

1. From the **Admin** menu, select **Site Access**>**Access Control**.
Access Control is displayed.

Public Access

Provides public access for site users.

To allow public access to the site:

1. In **Public Access**, select the **Enable public access** checkbox.
The site's dashboard and layout can be viewed on the link provided by SolarEdge, in the **Public Address** field, without the user needing to log in to SolarEdge.
2. In the **Public Name** and **Monitoring Access** fields, add the public name and from the **Monitoring Access** dropdown list select the permission you require.
3. To activate the URL address, click **Save**.
Your URL address is activated.
4. A URL address is displayed in the **Public Address** field, click **Copy**.
You can share the URL address with other users.

Kiosk View

Kiosk View enables you to set up a live view of the SolarEdge Monitoring platform for display in a public space, for example, the lobby of a public building.

To set up a Kiosk View:

1. In **Kiosk View**, select the **Create a link for public area display** checkbox.
2. **Optional.** In the **Site Display Name** field, edit the **Site Display Name**.
This name replaces the site name on the public screen display.
3. Click **Save**.
Your URL address is activated and displayed in the **Kiosk Address** field.
4. Click **Copy**.
You can paste the URL address into a browser, to display on a public screen.

**NOTE**

For further information on how to set up a live view of the **SolarEdge Monitoring** platform for display in a public space, refer to the [Set Up a Public Display of the SolarEdge Monitoring Site Dashboard in the Monitoring Platform Application Note](#).

API Access

SolarEdge's API allows other software applications to access the monitoring system database for the following purposes:

- Data analyses
- Fleet management
- Displaying system data in other applications

**NOTE**

SolarEdge keeps data in a secure VIPI server.

To enable API Access:

1. To copy your Solaredge API key, read the **SolarEdge API Terms and Conditions** and select the checkbox to confirm.
The **Copy** field is displayed.
2. Click **Copy**.
Your API key is copied.

**NOTE**

Refer to the [SolarEdge Monitoring Server API](#) document for further information.

Access to Performance Ratio Chart by Site Users

Enables site users to access the Performance Ratio chart.

To enable users to access the Performance Ratio chart:

1. In **Access to Performance Ratio Chart by Site Users**, select the **Enable site users to view their site performance ratio chart within the dashboard** checkbox.
2. Click **Save**.
You can view the Performance Ratio Chart for the site on your site dashboard.

**NOTE**

Refer to the [Performance Ratio Calculation and Activation in the Monitoring Platform Application Note](#) for further information.

Associated Accounts

PV sites registered and managed on the SolarEdge Monitoring platform can be accessed and monitored by third parties, by utilizing the Associated Accounts feature. Site owners can grant access to a third party at any time and control access rights for any site.

To enable Associated Accounts Access:

1. From the **Admin** menu, click **Site Access>Associated Accounts**.
Associated Accounts Access is displayed.

Company Name	Approved on	Access Level
Total Electric	12/14/2022 07:09 PM	View / Edit
Solar Bunny	12/14/2023 05:07 PM	View / Edit

2. Click **Grant Access**.
The **Associated Account Access** pop-up is displayed.

Associated Account Access

Access Level ?
View Only

Associated Account
Select Account

I certify that I am the legal owner of this system and/or have obtained the authority to share information regarding the Systems with third parties.
I authorize SolarEdge to disclose information and grant access to the information contained on SolarEdge's monitoring portal to the selected associated account ("Recipient").
I understand that the disclosure may contain information about the system(s), including personal information.
I give SolarEdge the right to edit the information contained in SolarEdge's monitoring portal on my behalf (if such rights were explicitly granted).
I agree to release SolarEdge and its officers, directors, contractors, employees, agents, and assignees, from any and all action and damage claims arising from, or in any way connected to the discloser, or any use of information by the recipient.

I confirm I have read the above disclaimer

Cancel Save

3. From the **Access Level** dropdown list, select **View Only** or **View/Edit**.
4. From the **Associated Account** dropdown list, select which accounts to grant access to.
5. Read the legal information and select the confirmation checkbox.
6. Click **Save**.
An email is sent to the other party's account administrator.

**NOTE**

Refer to the [Monitoring Associated Accounts Application Note](#) for further information.

Logical Layout

Logical Layout displays a comprehensive list of the site's components. It enables you to do the following:

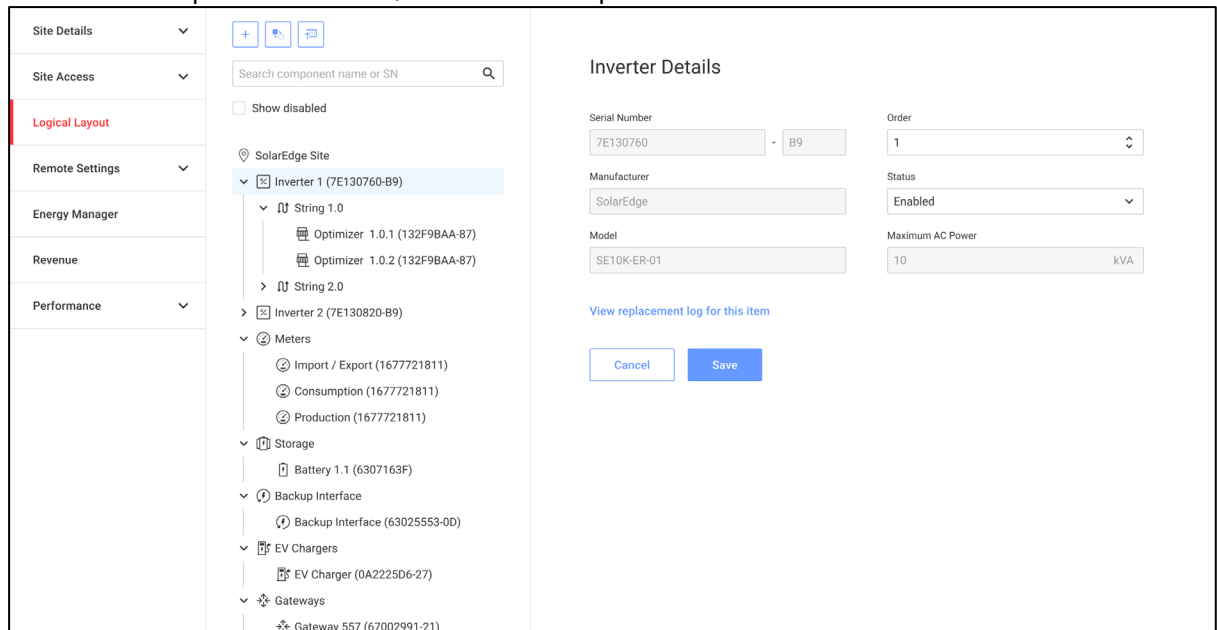
- Add a new inverter, gateway or EV charger.
- Replace components, such as inverters, power optimizers, gateways, and SMIs.
- Update the module's details.

To view **Logical Layout**:

1. From the **Admin** menu, select **Logical Layout**.

The component list is displayed.

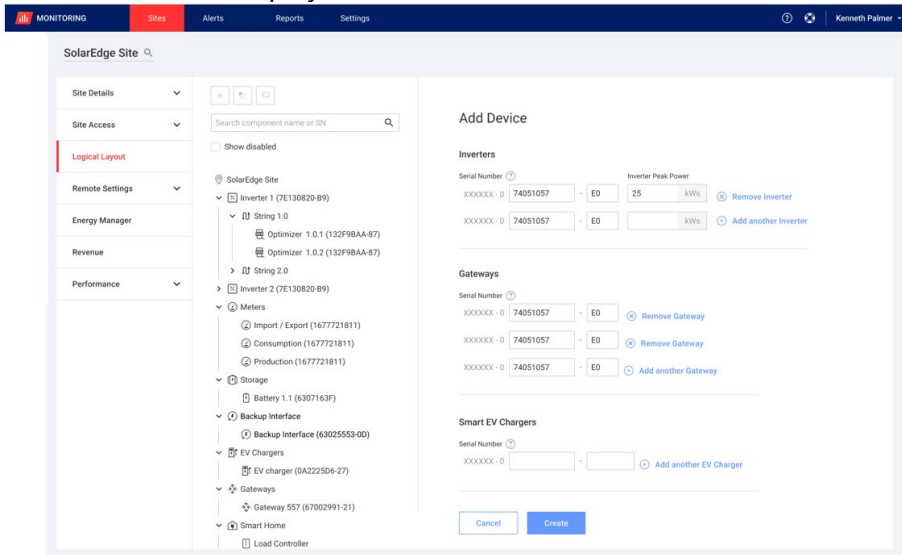
- To view a component's details, select the component.



- Optional.** In **Inverter Details**, from the **Order** dropdown list, change the order number.
- Optional.** From the **Status** dropdown list, change the status.
- Click **Save**.
The component's details are saved.

To add a component in Logical Layout:

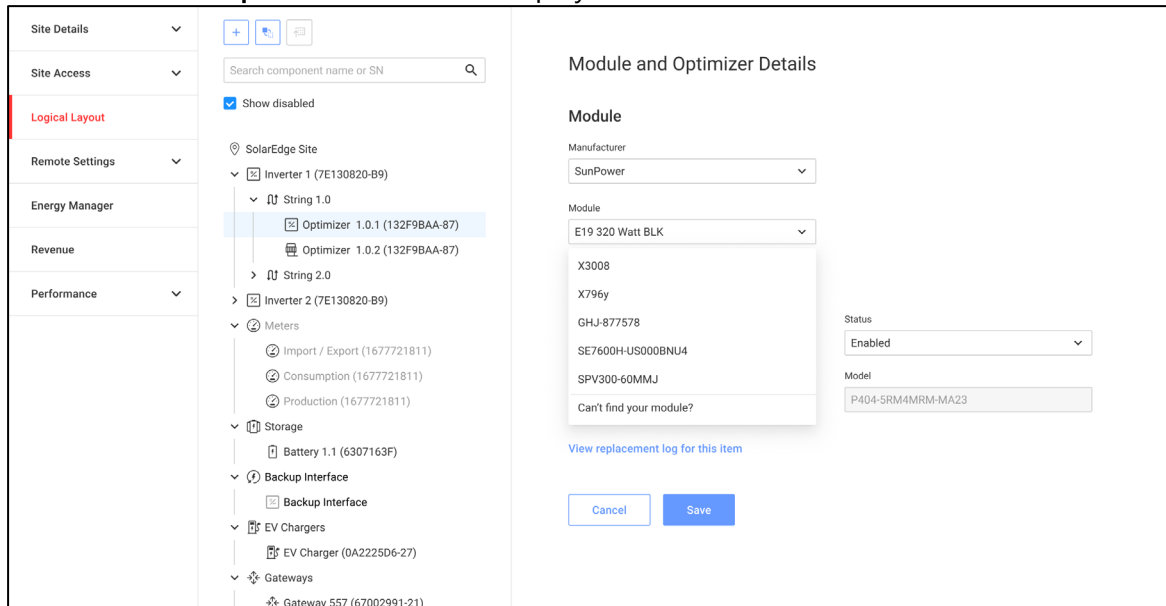
- Click +.
Add Device is displayed.



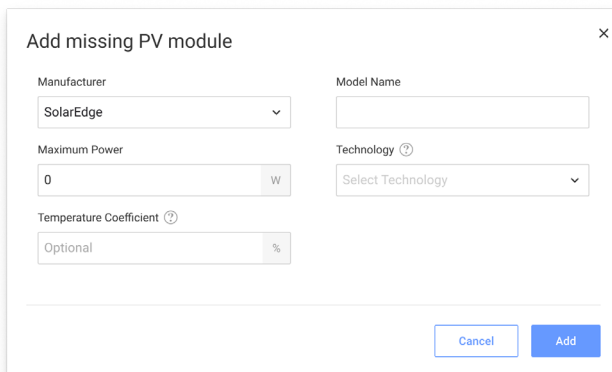
- To add Inverters, Gateways, or Smart EV Chargers, click **Add another <component>**.
New fields are displayed.
- In the **fields** displayed, add the new component's details.
- Click **Create**.
The new component appears on the component list.

If you can't find your module or optimizer on the components list:

1. Click any optimizer or module on the components list.
Module and Optimizer Details are displayed.




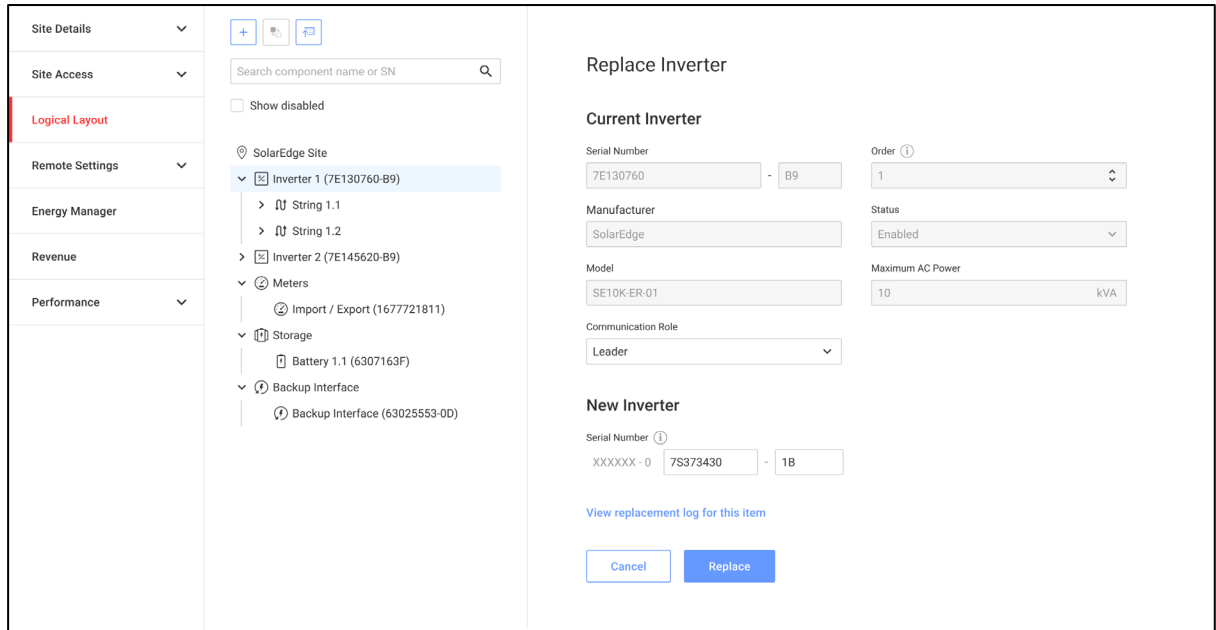
2. From the **Module** dropdown list, select **Can't find your module?**
The **Add missing PV module** pop-up is displayed.



3. In the fields provided, add your module's missing details.
4. Click **Add**.
Module and Optimizer Details are displayed.
5. Click **Save**.
Your module's details are saved on the components list.

To replace a component in Logical Layout:

1. In the component list, select the component to replace.
2. Click .
Replace <component> displays your component's details. They are divided into **Current <component>** and **New <component>**.



3. In **New <component>**, enter the **Serial Number** of the new component.



NOTE

The serial number of your inverter is printed on the device's label.

4. Click **Replace**.

The new component appears on the component list. The replaced component is disabled.

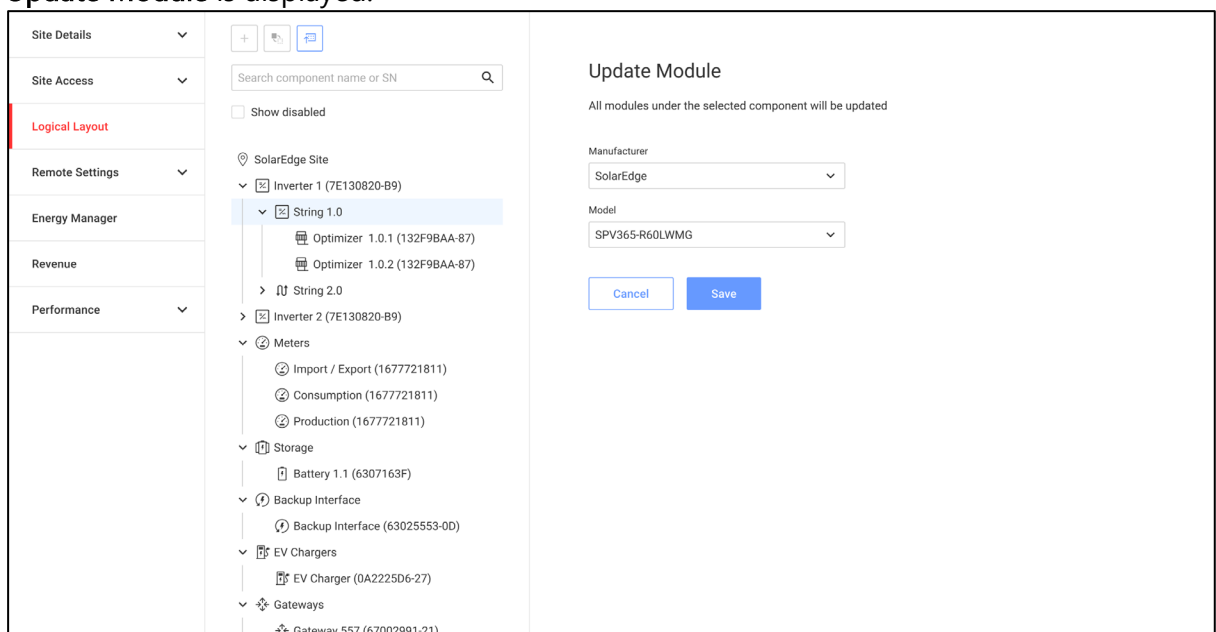
5. Click **View replacement log for this item** to see if the component was previously replaced, when it was replaced, and how many times it has been replaced.

To update a component in Logical Layout:

1. In the component list, select the component you want to update.

2. Click .

Update Module is displayed.



3. In the **Manufacturer** field, select the manufacturer.

- In the **Model** field, select the model.
- Click **Save**.

Your components details have been updated.

**NOTE**

To update or replace all strings under an inverter, click on the inverter and all strings under that inverter are updated. To update all modules under a string, click on the string and all modules under that string are updated.

**NOTE**

If there is a **physical layout** for this site:
The updated component in the logical layout automatically appears in the location of the replaced component.

Remote Settings

The SolarEdge Monitoring platform enables you to remotely set grid settings for your system and perform remote firmware updates for inverters on your PV site. This capability saves significant time as site visits are not required for simple firmware updates. Updating the firmware adds value to the PV site as it includes newly released capabilities and features and helps to solve existing issues.

To learn what's included in the latest inverter firmware version, read the [SolarEdge Firmware Release Notes](#).

**NOTE**

Access to Remote Settings is only available for account admin users.

Grid Settings

In Grid Settings you can set grid parameters remotely for inverters on your PV site.

To change grid protection settings remotely:

- From the **Admin** menu, select **Remote Settings**>**Grid Settings**.
Grid Protection Settings is displayed.

The screenshot shows the 'Grid Protection Settings' interface. On the left is a sidebar with a navigation menu containing: Site Details, Site Access, Logical Layout, Remote Settings (expanded), Grid Settings (highlighted), Energy Manager, Revenue, and Performance. The main content area has the title 'Grid Protection Settings'. Underneath, it says 'Set grid protection settings from remote' and has two radio buttons: 'Apply country default grid settings' (which is selected) and 'Apply custom grid settings'. Below the radio buttons are 'Cancel' and 'Save' buttons. At the bottom of the main area, it says 'Inverters Active Settings Status (5)' with a dropdown arrow.

2. Select **Apply country default grid settings** or **Apply custom grid settings**.
3. If you select **Apply country default grid settings**, click **Save**.
The default grid settings are automatically saved.
4. If you select **Apply custom grid settings**, fill in the relevant parameters in the tables displayed.
5. Click **Save**.
Your inverter's custom grid settings are saved.

**NOTE**

Refer to the [Viewing and Setting Inverter Grid Protection Values Application Note](#) for further information on grid settings.

Firmware Update

In Firmware Update, you can remotely perform firmware updates for inverters at your PV site.

To perform a remote firmware update:

1. From the **Admin** menu, click **Remote Settings**>**Firmware Update**.
<**Component**> **Firmware Update** is displayed.

Firmware	Version Installed	Latest Available Version
CPU	4.17.46	4.22.12
DSP1	1.100.1610	1.100.1620
DSP2	2.100.1407	2.100.1407

The update should take about 60 minutes.
If there are communication related issues, the update might take up to 24 hours..
You can leave this page at any time

Update

Firmware Updates History (2) ▾

2. If you have more than one inverter on site, select the Inverter to update, from the inverter list. You can only update one inverter at a time.
3. Under <**Component**> **Firmware Update**, click **Update**.
During the firmware update process, a progress bar and a status indicator are present for each component. The process may take up to 1 hour. You can exit the page at any time.

**NOTE**

If the latest inverter firmware is installed, the **Update** button is not displayed.

**NOTE**

Refer to the [Remote Firmware Upgrades Application Note](#) for further information.

Energy Manager

SolarEdge's Storage Solution can be used for various applications that enable energy independence for system owners, by utilizing a battery to store energy and supply power as needed. One of the main applications of Storage Solution is Battery Profile programming, in which the system operates according to a configurable charge and discharge profile, supporting for example, time of use tariffs, such as, charging the battery from the PV and grid when tariffs are low and discharging the battery when tariffs are high.

Energy Manager displays the mode selected by the owner. If the system owner selects their profile, then the installer cannot make any changes to the profile and the mode appears in view-only format and cannot be modified by the installer. If the system owner selects default settings in the [mySolarEdge](#) app then the installer can modify the Battery Mode.

**NOTE**

Energy Manager is only displayed if a battery is installed on site.

To apply a battery profile to a site:

1. From the **Admin** menu, select **Energy Manager**.

Energy Manager is displayed with your current profile's settings.

Inverter	Set By	Battery Mode	Profile Name	Last Update	Status	Log
Inverter1 (7E1264E5-DA)	System Owner	Maximize Self-Consumption		12/14/2022 3:12 AM	Success	⋮
Inverter2 (7E145620-B9)	Installer	Maximize Self-Consumption		12/13/2022 8:12 PM	Success	⋮

2. To modify your account profile, select **Installer Selection**.
3. In the **Installer Selection** fields, select one of the following options:
 - **Maximize Self-Consumption:** This is the battery mode.
 - **Account Profile:** This is configured at account level. If you select this option the profile list is displayed. Select your **Account Profile**.
 - **Solaredge Profile:** This is a list of profiles SolarEdge created. If you select this option the profile list is displayed. Select your **SolarEdge Profile**.
 - **Disabled:** This disables the battery mode.
4. Click **Save**.
The new battery profile is automatically applied to all inverters on site.

**NOTE**

Refer to the [Battery Profile Programming in the Monitoring Platform Application Note](#) for further information.

Revenue

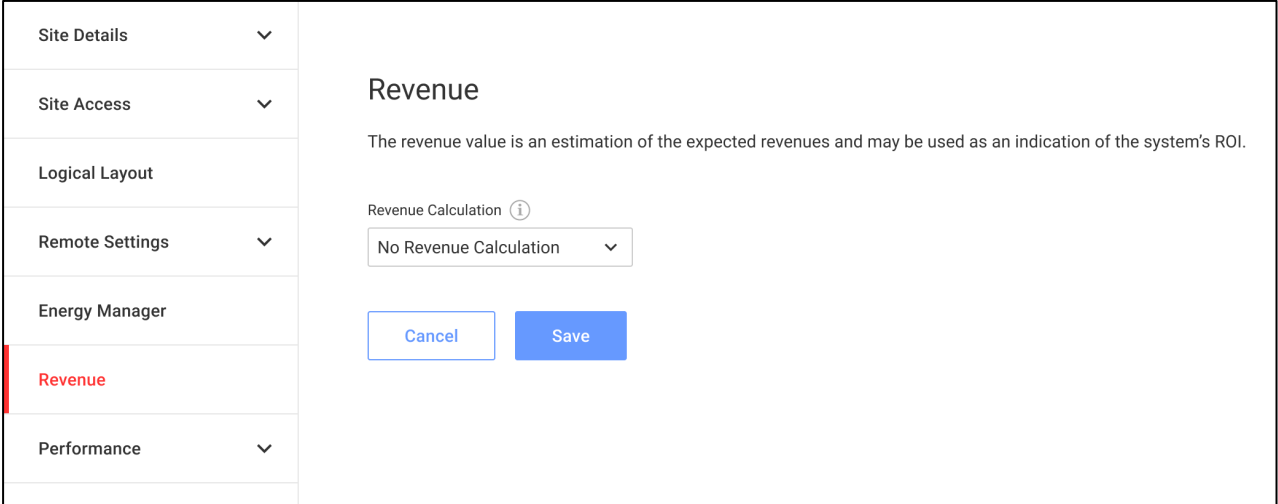
Revenue enables you to configure a revenue calculation for your site. The revenue value is an estimate of expected revenues and is used as an indication of the system's Return on Investment (ROI).

Once revenue is calculated, it is displayed on the site dashboard and in the Reports tab. The system owner can also view it in the [mySolarEdge](#) app.

SolarEdge monitoring supports two models of revenue calculation: 'Flat Rate' and 'Time of Use'. The default for new sites is **No revenue calculation**.

To configure revenue for a site:

1. From the **Admin** menu, click **Revenue**.
Revenue is displayed.



The screenshot shows the 'Revenue' configuration page. On the left is a sidebar menu with items: Site Details, Site Access, Logical Layout, Remote Settings, Energy Manager, Revenue (highlighted), and Performance. The main content area is titled 'Revenue' and includes the text: 'The revenue value is an estimation of the expected revenues and may be used as an indication of the system's ROI.' Below this is a 'Revenue Calculation' dropdown menu with an information icon, currently set to 'No Revenue Calculation'. At the bottom are 'Cancel' and 'Save' buttons.



NOTE

Refer to the [Revenue Calculation in the Monitoring Platform Application Note](#) for further information.

Performance

Performance enables you to do the following:

- **Inverter kWh/kWp:** This is an energy comparison performed by dividing each inverter's production by its own peak DC power.
- **Estimated Energy:** This facilitates a comparison between the estimated and actual performance (kWh).
- **Performance Ratio:** This edits the settings of the Performance Ratio (PR) value.



NOTE

Performance Ratio is only available for sites that have sensors installed or if a satellite-based PR service has been purchased.

Inverter kWh/kWp

Inverter kWh/kWp enables you to activate a normalized energy comparison (kWh/kWp) in the Dashboard chart and the Analysis view. You are required to enter the peak DC power for each inverter. This information allows for accurate energy comparisons per unit of capacity basis, making it easier to compare performance across different inverters, irrespective of their size, number of modules connected, or their peak power outputs.

To enable peak power normalization:

1. From the **Admin** menu, click **Performance>Inverter kWh/kWp**.
Inverter kWh/kWp is displayed.

2. Select the **Enable peak power normalization** checkbox.
3. In the **Inverter Peak DC Power** field, enter the peak DC power for each inverter.
4. Click **Save**.
Peak power normalization is now available on the Inverter Power chart on your site's dashboard.

Estimated Energy

In Estimated Energy you activate a comparison between the estimated and actual performance (kWh) of your system. This comparison can be viewed on the Comparative Energy chart on your dashboard, and as an additional column in the monthly reports. You enter your system's monthly estimated energy to track and compare projected energy production against actual outputs, providing valuable insights on your system's performance and efficiency.

To enter estimated energy values:

1. From the **Admin** menu, click **Performance>Estimated Energy**.
Estimated Energy is displayed.

2. Select the **Enable estimated energy** checkbox.

3. For each month, type the monthly estimated energy (kWh).
4. Click **Save**.

The **Monthly Estimated Energy** is saved.



NOTE

Homeowners with full access rights can view these values. Make sure you provide values that can be shared. Refer to [Use Estimated Energy in the Monitoring Platform Application Note](#) for further information.

Performance Ratio

Performance Ratio (PR) is a critical metric used to assess the efficiency and overall performance of a solar photovoltaic (PV) system. It provides insight into how effective the system is in converting sunlight into electricity. It is typically expressed as a percentage and calculated by comparing the actual energy output of the PV system to the theoretical energy output that can be generated under ideal conditions.



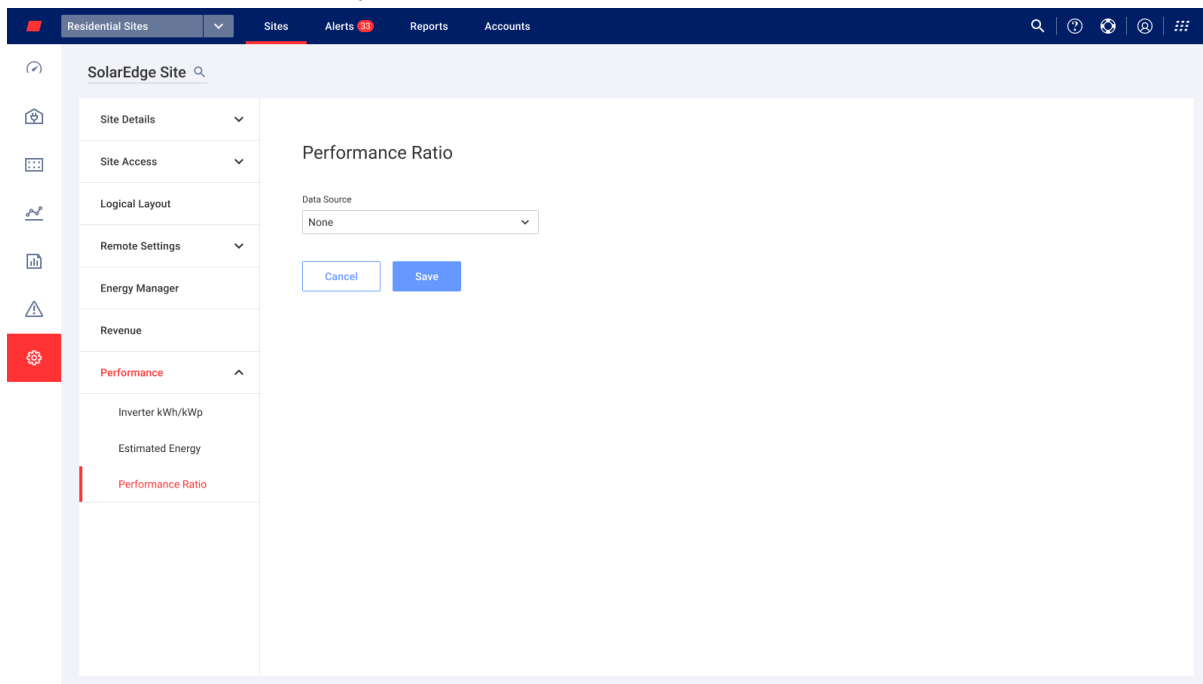
NOTE

If a sensor is installed, or if a satellite-based PR service was purchased, Performance Ratio is displayed on the Admin menu.

To set up PR calculations in the Monitoring platform:

From the **Admin** menu, click **Performance**>**Performance Ratio**.

Performance Ratio is displayed.



NOTE

Refer to the [Performance Ratio Calculation and Activation in the Monitoring Platform Application Note](#) for further information.