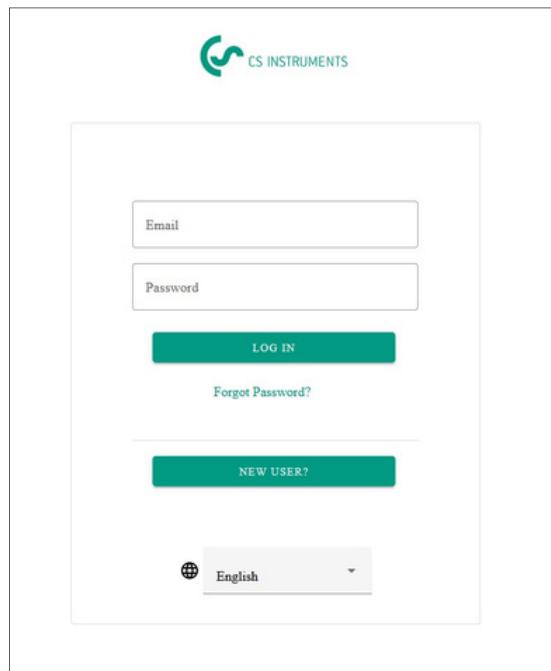


Instruction manual

CSLeak ReporterCloudSolution for LD 500 / LD 510 Leak Detectors

www.leak-reporter.com



→ The user who uses the license key to create an organization automatically becomes Super-Admin of the system.



CS INSTRUMENTS GmbH & Co. KG

Sales Office South
ZindelsteinerStreet15
D-78052 VS-Tannheim
Phone: +49(0)7705 97899-0
Fax: +49(0)7705 97899-20
Email: info@cs-instruments.com
Website: <http://www.cs-instruments.com>

Sales Office North
Gewerbehof 14
D-24955 Harrislee
Phone: +49(0)461 807150-0
Fax: +49(0)461 807150-15
Email: info@cs-instruments.com
Website: <http://www.cs-instruments.com>

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2. Foreword

Dear Customer,

if you have a leak detector **LD 500 / LD 510** (abbreviated as LD 5X0 in the text below), you can export the leakages from the LD 5X0 and import and evaluate them using the **CS Leak Reporter Cloud Solution** software.

Data transfer via USB stick makes report generation child's play. You can transfer the stored leakages into a report and easily manage and supplement the data in the process.

In addition, you can import your existing data from Leak Reporter V1 and Leak Reporter V2 if you have already used this software. Otherwise, these points are irrelevant for you.

Due to the central database every user always accesses the current database, additionally the data security is higher due to automatic data backups.

The Leak Reporter software enables a multi-user system - so for each user you can individually define which data he/she has access to and which functions he/she can use.

Main functions:

- **Manage companies / buildings / projects / measurements**
 - Complete company data
 - Manage projects
 - Manage measurements
- **Documentation / report generation**
 - Picture of the leakage point
 - Date / Time
 - Size of leakage in liters/min (units adjustable)
 - Cost of leakage per year in € (currency freely definable)
 - Description of the leakage position with indication of company / department or hall / machine
 - Information about the leakage repair (defective element, measure, spare part).
 - Totals, priority, CO2 emissions per year, etc.
- **User and access management**
 - Inviting users and guests
 - Release of resources (leakage data) and rights for each user
 - Generation of individual roles
 - User maintenance

3. Notes

3.1. About this document

- Read this documentation carefully.
- Keep this documentation handy for reference when needed.
- Pass this documentation on to subsequent users of the product.

3.2. Disclaimer

~~CS INSTRUMENTS GmbH & Co. KG~~ for any particular purpose and assumes no liability for errors printed in this manual, nor for consequential damages in connection with the furnishing, performance, or use of this software.

4. General functional description

The CS Leak Reporter Cloud Solution software is used to manage and evaluate leakage data recorded with an LD 5X0 leak detector. The data can be imported by means of a USB stick, and the images of the leakages from the device are automatically transferred. These can then be supplemented with your own images if required. The measurements can be described in more detail in the software and also initially specified for the project. In the report, the desired measuring points can be evaluated and transferred into a report. There, the sum values, the information of the leakage costs as well as the imputed quantities for the CO2 emissions / year are also output.

5. System requirements

Hardware	PC / Laptop
Internet connection	Necessary - because browser based
Access	Browser-based (Firefox, Google Chrome)

6. Use of the CS Leak Reporter Cloud Solution

A local installation on your computer is not required, as the CS Instruments software has been installed and is operated on a MS Azure server.

Click www.leak-reporter.com to use the software conveniently from your browser.

→ The user who uses the license key to create an organization automatically becomes an admin of the system.

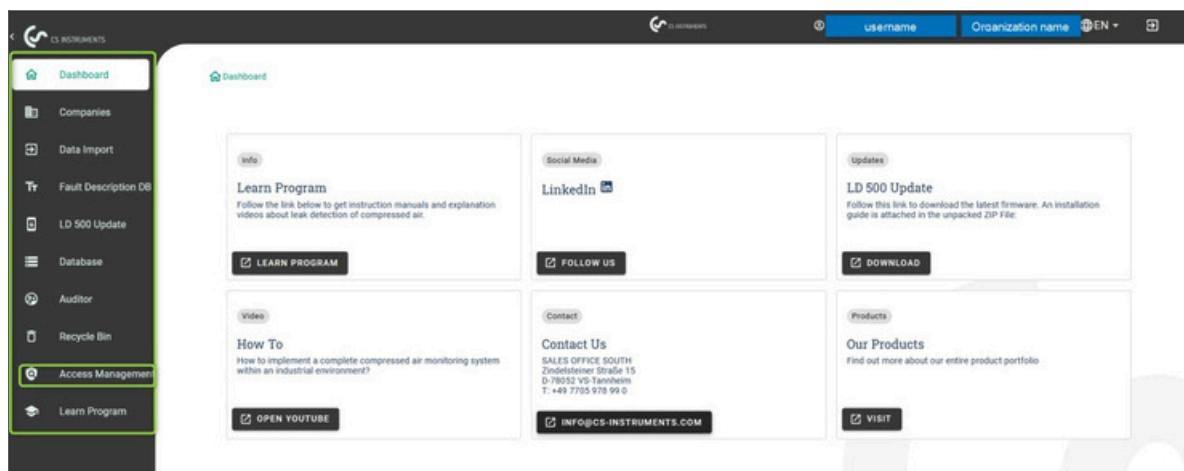
7. Operation

The operation is largely self-explanatory, and the software shows appropriate descriptions during the sequences how to operate the software.

Entries or changes can be made in all fields with a white background.

Navigation is via the **main menu bar** for the

- Leak Reporter Cloud Solution
- User and access management [**Permissions**]



7.1. Application start

Click www.leak-reporter.com to use the software conveniently from your browser.

The language can be selected with the button.

DE ▾

The language can be selected with the button.

7.2. Leak Reporter Cloud Solution Activation

7.2.1. General information

If you have purchased a license key, you can create an "Organization". In this license key is stored how many users the admin is allowed to create.

- **The user who uses the license key to create an organization automatically becomes an admin of the system.**
- Each user can log in twice in parallel with his account

The software can be tested free of charge for 30 days with the trial license key. After the 30 days the software locks and you need a license key to activate the permanent access. There is demo data in the test organization, so you can test the software without LD 500.

7.2.2. Activation of access to the Leak Reporter Cloud Solution

1. Go to the following URL: www.leak-reporter.com and click on [new user].
2. Register now with your email address and contact details

Personal Info

Email*	Company*
Password*	Confirm password*
First name*	Last name*
Relationship	Phone
Country*	Street*
City*	Zip or Postal code*
<input type="checkbox"/> Subscribe to news letter for latest updates on products and services <input type="checkbox"/> With your registration you agree to our privacy policy *	
<input type="button" value="REGISTER"/> <input type="button" value="BACK TO LOGIN"/>	
 English 	

3. After successful registration you will receive a confirmation email to verify your account
4. Now activate an organization with the license key
 1. Click [ACTIVATE LR CLOUD LICENSE].
 2. You can find the license key on the enclosed delivery bill and the USB stick

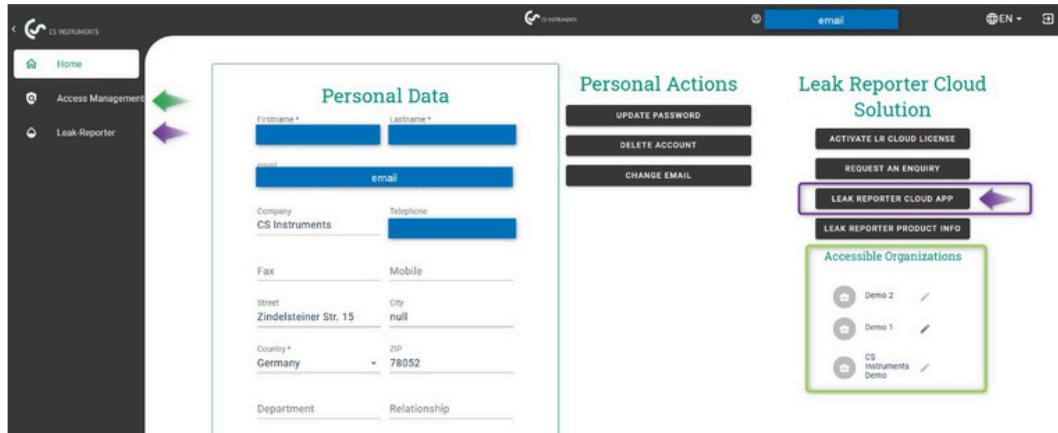
Leak Reporter Cloud Solution

Activate License

<input type="checkbox"/> I do not have a license key. Activate 30 days trial license.
<input type="checkbox"/> I have purchased a license key. Activate the license.
License Key *
Organization *
<input type="button" value="CANCEL"/> <input type="button" value="CONFIRM"/>

5. Now you have generated an “**accessible organization**” and can use the software. Now click on

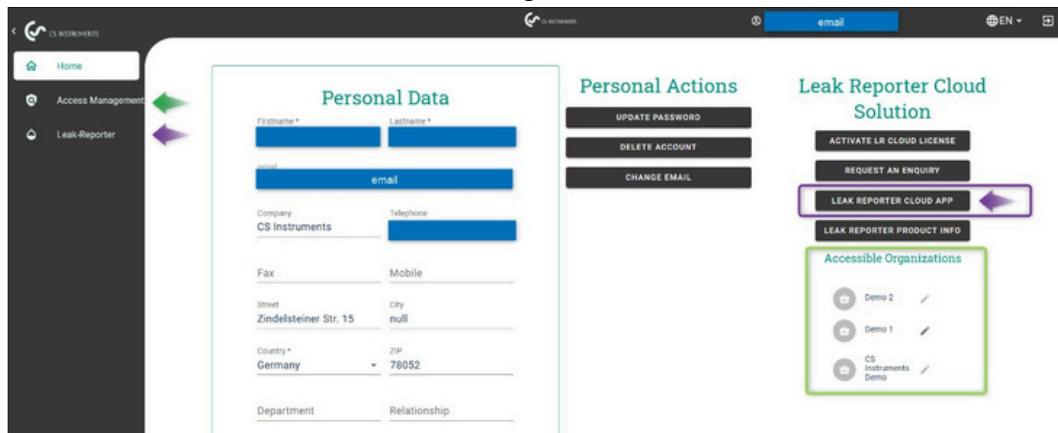
1. “Access Management” to invite people to the cloud
2. “Leak reporter” to process the leakage data



7.2.3. Manage CS-ID account within the apps

In the black menu bar, you can manage your account within the

- Leak Reporter Cloud Solution
- User and access management



1. Change of user data and organization
2. Changing the organization (if you are a member of more than one organization)
3. Log out of your account

8. Leak Reporter Cloud Solution

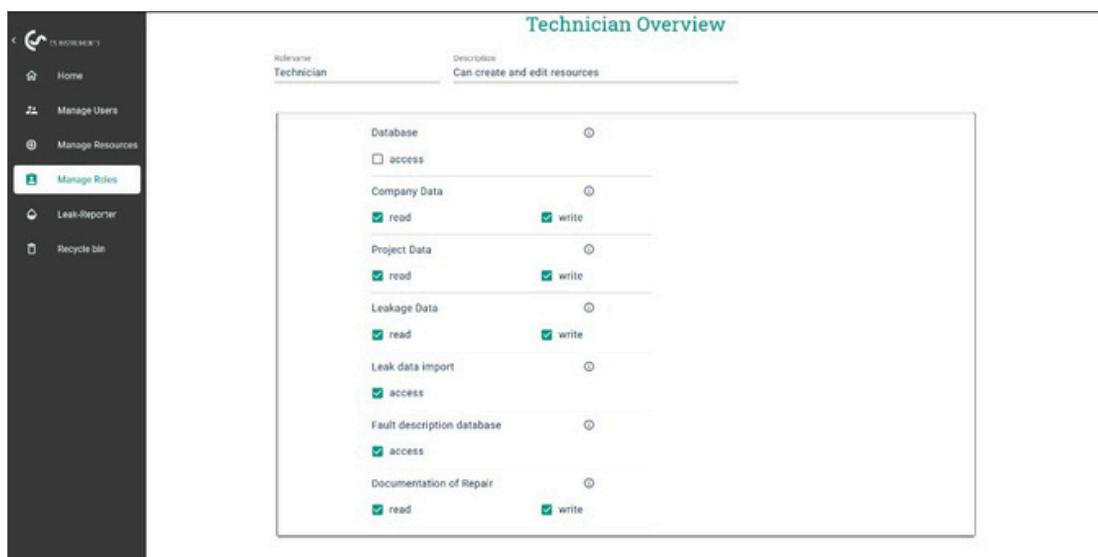
8.1. Available rights and usable functions

Since each user logs in using an e-mail address, the system administrator can configure individually for each user,

1. Which leakage data (companies>projects) he is allowed to see
2. Which functions he is allowed to use (assigned role: admin, technician, guest).

There are 3 roles available by default. However, individual roles can also be generated within the user and access management.

Role of the technician:



Resource	Access Rights
Database	<input type="checkbox"/> access
Company Data	<input checked="" type="checkbox"/> read <input checked="" type="checkbox"/> write
Project Data	<input checked="" type="checkbox"/> read <input checked="" type="checkbox"/> write
Leakage Data	<input checked="" type="checkbox"/> read <input checked="" type="checkbox"/> write
Leak data import	<input checked="" type="checkbox"/> access
Fault description database	<input checked="" type="checkbox"/> access
Documentation of Repair	<input checked="" type="checkbox"/> read <input checked="" type="checkbox"/> write

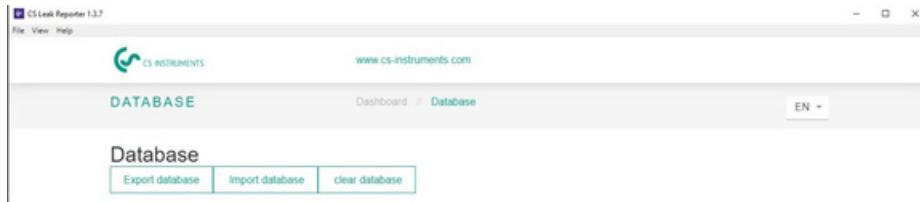
8.2. Import database

If you have been using Leak Reporter V1 or Leak Reporter V2 until now, you can import the existing database into Leak Reporter Cloud Solution.

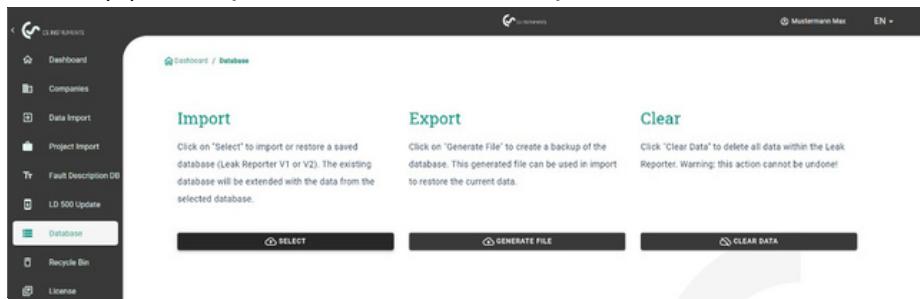
- **Please make sure that you do not unpack the Leak Reporter V1 database and import the ZIP file directly.**
- In addition, the Leak Reporter V1 must be at least on the release level 1.3.7.
- Leak Reporter V2 and Leak Reporter Cloud Solution share user interfaces for the most part.

Note: The database import may be performed only by users who have a role (Admin) with the appropriate privilege to protect the database from improper access.

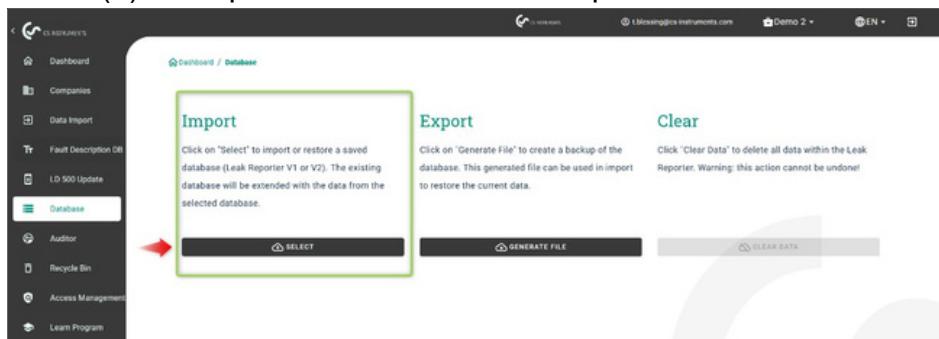
(1) Export database Leak Reporter V1



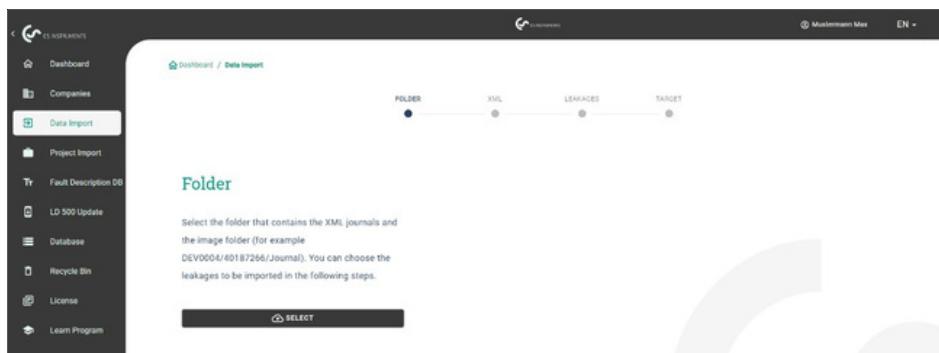
(2) Export database Leak Reporter V2



(3) Import Database in Leak Reporter Cloud Solution



8.2.1. Data import leakage



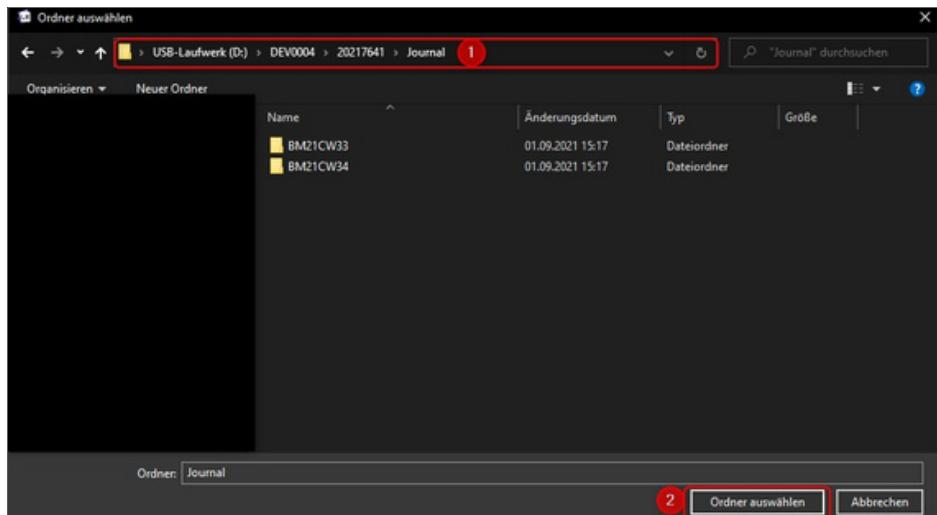
The data import takes place as a sequence:

- (1) Folder selection
- (2) XML File selection
- (3) Selection of leakages to be imported
- (4) Imported leakage target

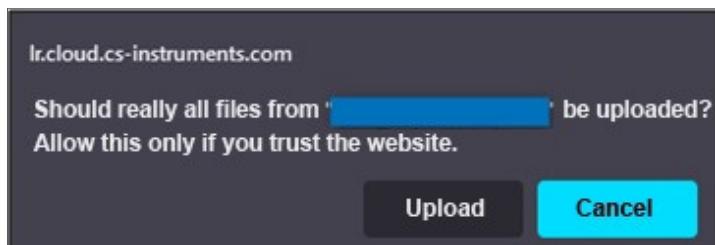
The transfer of the exported data from the LD 5X0 takes place via the menu item Data import. The data is transferred from the LD 500 via a USB stick / USB data carrier.

The **Select** button starts the selection of the journal file (exported XML file of the LD 500, which contains the leakage data).

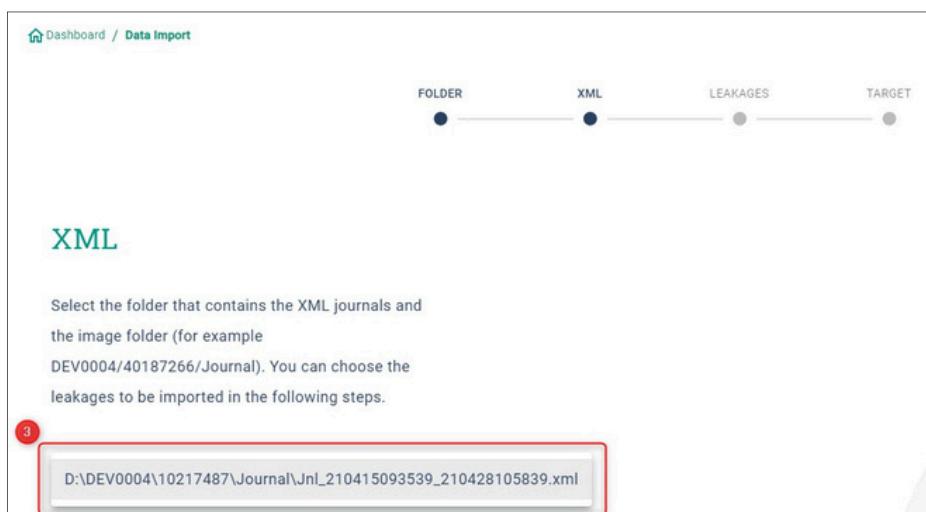
- (1) Open the "Journal" folder according to the path shown on the USB stick
- (2) "Select folder"



- (3) Accept possible browser message

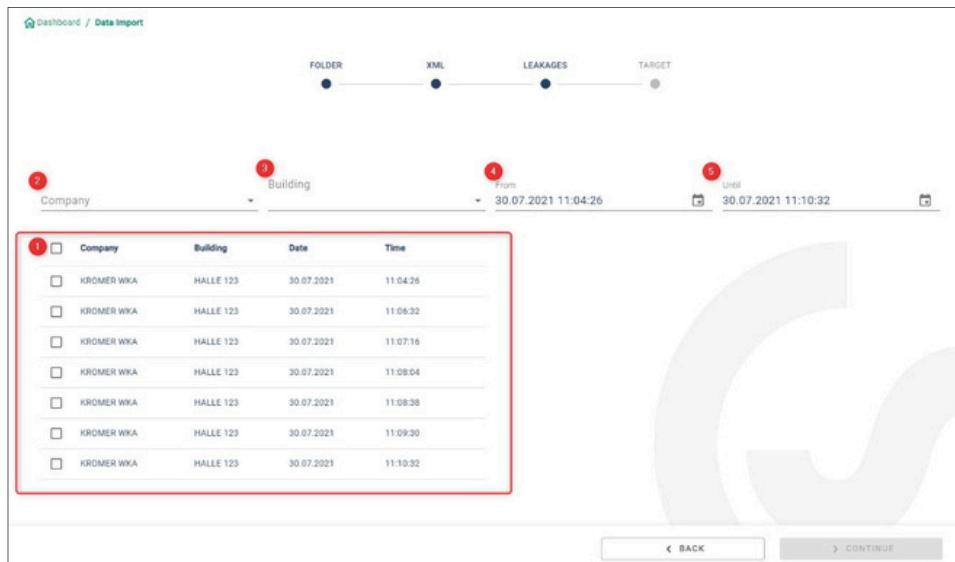


- (4) Select the desired XML file, which was exported from the leak detector



After selecting the XML file, you can filter the leakages by their "Company" and "Building" or a flexibly selectable time period:

- (1) Selection of individual leakages
- (2) Filtering by one or more companies
- (3) Filtering by one or more buildings
- (4) Definition start period (first leakage)
- (5) Definition end period (last leakage)



Possibilities

(1) For the leakages of each company (Kromer WKA) to be imported, an already existing company and / or project can be selected as target. The buildings of the leakages are then created in the selected company at the same time.

(2) If the company already exists, a new project is attached to it or an existing project can be selected. The buildings of the leakages are then created in the selected company at the same time.

(3) If the company of the data import does not exist yet, a new company with the corresponding name is created, as well as a first project. The buildings of the leakages are then created in the selected company at the same time. (as shown in the screenshot)



KROMER WKA

Choose an existing company and/or project into which to import the selected leakage data. Select [Create new] in the company selection to create a new company with the shown name (in green color). Select [Create new] in the project selection to create a new project with the name "Data import <Timestamp>" where <Timestamp> is replaced by the current date and time.

Company
[Create new]

Project
[Create new]

Once you have imported all the leakages, you have the following options:

- (1) Perform a new data import analogously
- (2) View the project within the last imported data



Data was successfully imported.

Would you like to view the imported data or to import additional data?

- 1 **ADDITIONAL IMPORT**
- 2 **SHOW DATA**

If the used firmware of the LD 5X0 is outdated at the time of the export, this is indicated as follows:



 The software of your LD 500 is outdated. Please update it.

Company	Building	From	Until
		17.12.2020 10:05:43	17.12.2020 10:06:12
<input type="checkbox"/> Company <input type="checkbox"/> Building <input type="checkbox"/> Date <input type="checkbox"/> Time			
<input type="checkbox"/> CS Instruments	Conference Room 2 Level	17.12.2020	10:05:43

The latest LD 500 firmware can be downloaded from the following link:
https://www.cs-instruments.com/de/downloads/software/firmware-leckage-suchgeraete-CS-Leak-Reporter-Cloud-Solution-BAL_EN_V2.00

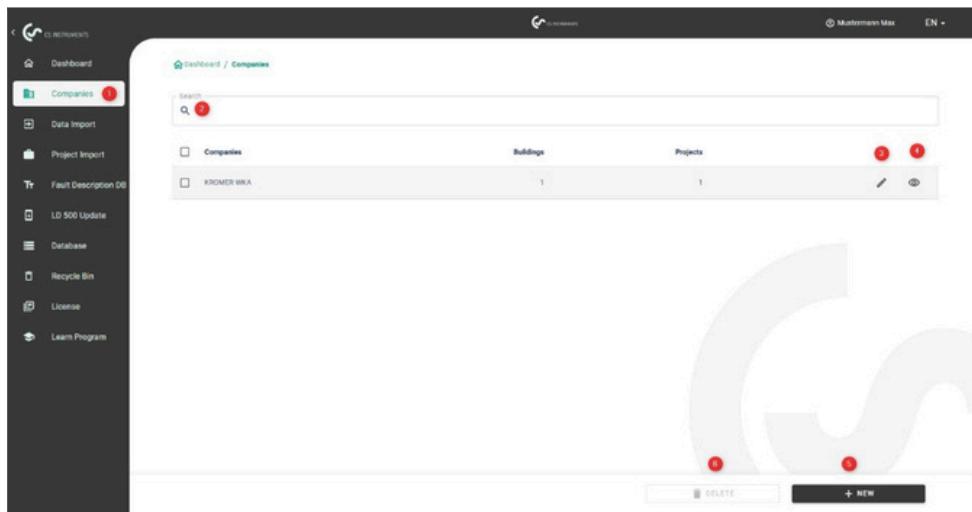
8.3. Companies management

The data of the imported companies can be found in the main menu under "Companies" item.

the

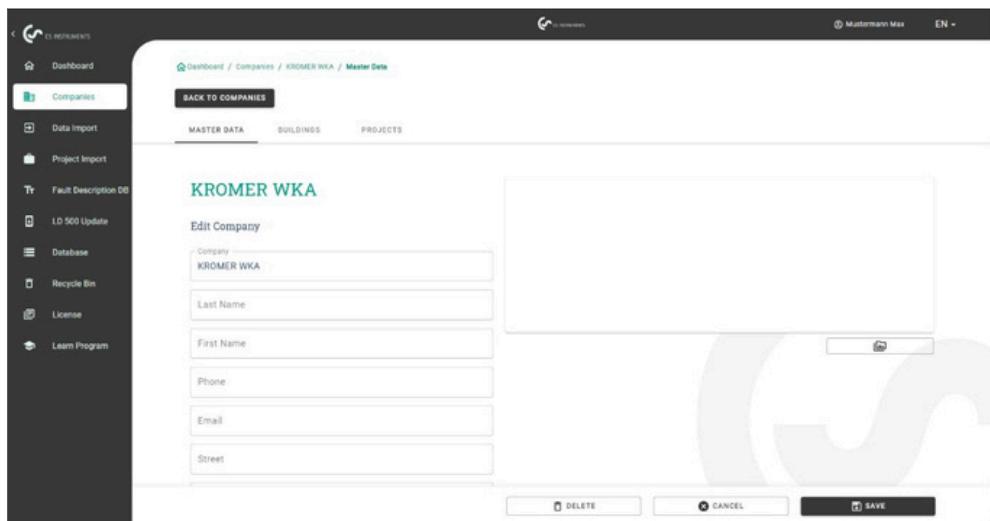
8.3.1. Show company

- (1) "Companies" selection in the main menu bar
- (2) Search for a specific company
- (3) Edit the master data of the selected file
- (4) View the projects of the selected company
- (5) Create a new company
- (6) Delete the selected companies



8.3.2. Company master data

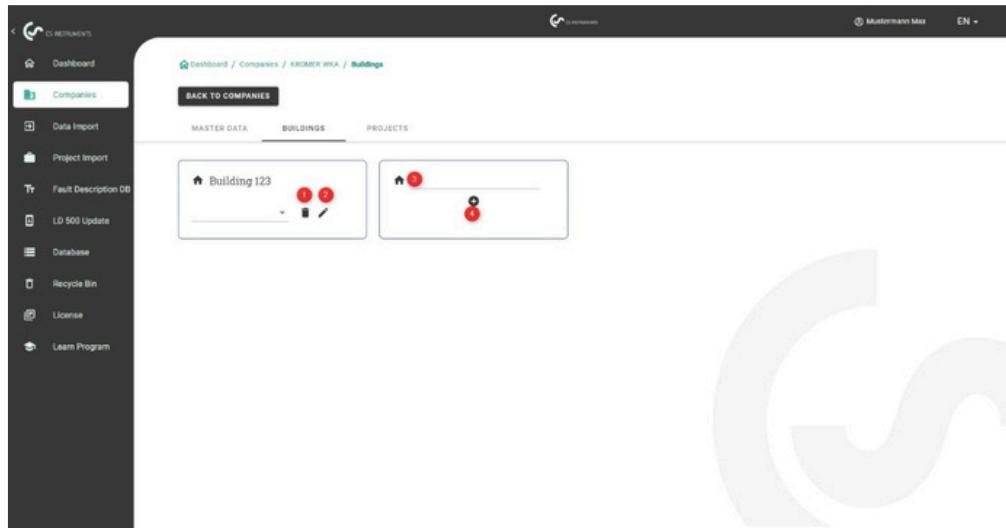
Under the company master data you can store contact information as well as a company logo. The information stored here will be printed on the cover sheet of the report.



8.3.3. Building

Buildings can be added or deleted under the "Buildings" tab.

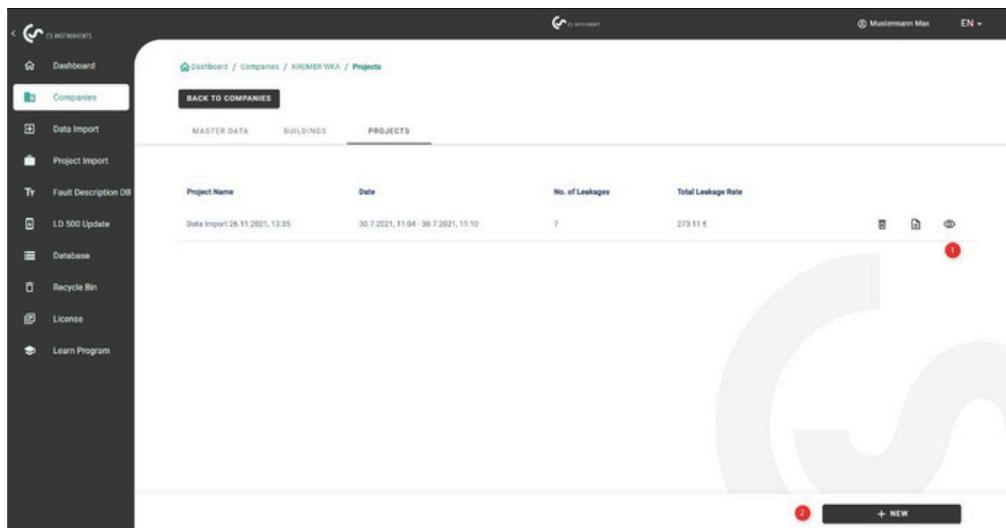
- (1) To delete a building, click on the corresponding recycle bin
- (2) To edit a building, click on the corresponding pin
- (3) To create a new building, enter the name accordingly
- (4) To add the building, click on the plus sign



8.3.4. Companies - Projects

On the tab "Projects" the already created / imported data are displayed. Each data import creates a new project here, unless an existing project was selected as the destination during a data import.

- (1) By pressing the "Eye" button, you call up the leakages of the project. The measurements and project master data stored in it and are then displayed there.
- (2) By pressing the "NEW" button you can create an empty project manually.



Project Name	Date	No. of Leakages	Total Leakage Rate
Data Import 26.11.2021, 13:35	30.7.2021, 11:04 - 30.7.2021, 11:10	7	273.11 €

8.4. Edit project master data

For each project the parameters made in LD 5X0 are used initially. If these have to be changed, this can be done globally for the entire project in project master data.

The project data is defined as follows:

- Name - project name (also printed on the report)
- Description - Project description

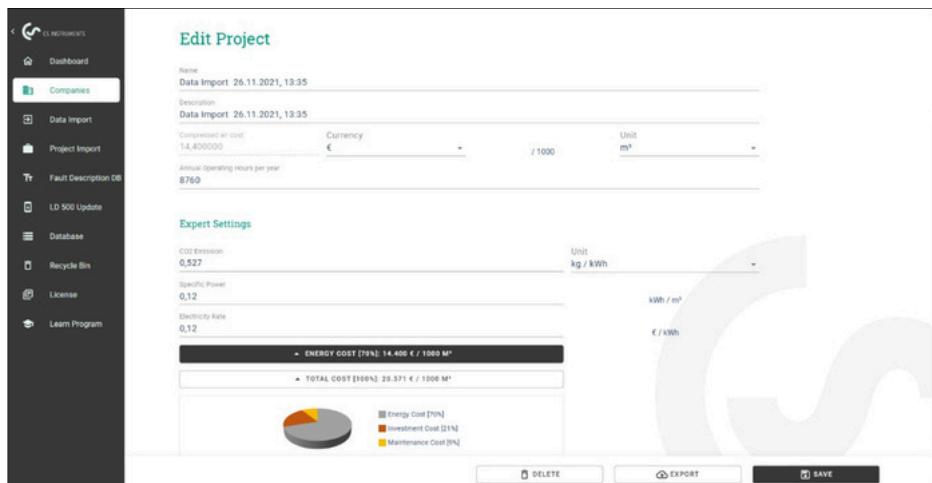
Currency	Local currency	
Unit	Unit of volume (m ³ or cf)	
Operating hours	Operating hours of the plant per year (e.g. 8760 for 24/7 operation)	
Costs	Cost for 1000 Nm ³ or CF of air in the currency to the right (calculated automatically if the "Electricity price" and "Specific power" have been entered in the expert menu)	
CO2 emissions	Here the default value with 0.527 kg / kWh is used	
Electricity price	Unit: Currency / kWh	
Specific power	PowerCompressors	Efficiency variable in (kWh / m ³ or kWh / CF)
Cost basis	Here, a distinction can be made between pure energy costs [70%] and full costs [100%]	

Costing Basis:

If the fields Electricity price and Specific power were filled in the expert menu, the software automatically calculates the energy costs of the compressed air system.

Typically, these correspond to 70% of the total costs, which consist of energy [70%], investment [21%] and maintenance [9%] costs.

Here the user has the possibility to decide between both cost types. The selected cost type will then be applied globally for the entire project.



The screenshot shows the 'Edit Project' screen. Key visible data includes:

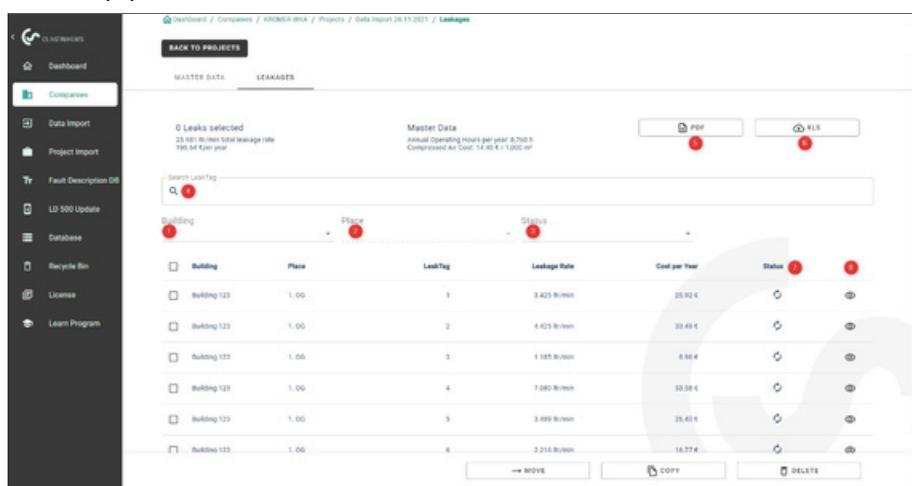
- Project Details:** Name: Data Import 26.11.2021, 13:35; Description: Data Import 26.11.2021, 13:35; Compressed air cost: 14,400000; Annual operating hours per year: 8760.
- Expert Settings:** CO2 Emission: 0,527; Specific Power: 0,12; Electricity Rate: 0,12.
- Cost Breakdown:** ENERGY COST [70%]: 14,400 € / 1000 m³; TOTAL COST [100%]: 29,571 € / 1000 m³.
- Cost Distribution:** A pie chart shows the breakdown: Energy Cost [70%] (grey), Investment Cost [21%] (orange), and Maintenance Cost [9%] (yellow).
- Buttons:** DELETE, EXPORT, and SAVE.

8.5. Leakage overview

On the Measurementstab you can see the measurements for including the project master data, shown in the red box.

Functions of the interface:

- (1) Building filters
- (2) Filter for the leakage location
- (3) Filter for leakage status (fixed / open)
- (4) Leak Tag Search
- (5) Generate PDF report
- (6) Generate Excel report
- (7) Status of the leakage (fixed / open)
- (8) Leakage View Details
- (9)



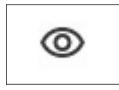
From left to right, the columns contain information for each leak about their:

- Building
- Location
- Leak Tag
- Loss volume flow
- Leakage costs per year
- Status of the measurement (open, resolved)

The formula for the leakage cost is as follows:

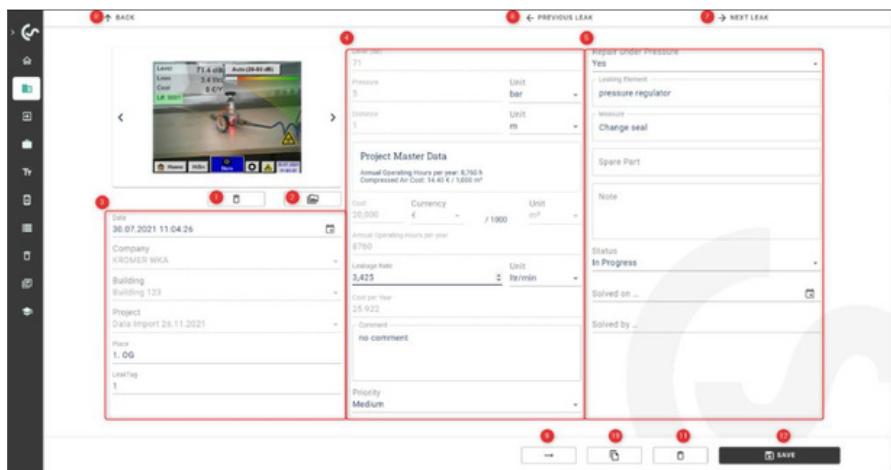
Leakage costs per year = loss in l/min * 60min/1000l * operating hours of the plant * cost of compressed air generation for 1000m³ in Euro

$$\begin{aligned}
 &= 5,95 \text{ l/min} * 60\text{min} * (1\text{m}^3 / 1000\text{l}) * 8760 \text{ (h/year)} * 25\text{€/1000 m}^3 \\
 &= 78,18 \text{ € leakage cost per year.}
 \end{aligned}$$

The button next to  the respective measurement displays the measurement detail data for editing.

The measurements can be changed in this mask. Measures as well as comments, the priority, the status and who has eliminated this leak at what time can be stored.

- (1) Delete the image
- (2) Adding a saved image
- (3) Information on the location of the leakage point
- (4) Information on the cost of leakage data
- (5) Leakage repair information
- (6) View previous leak
- (7) View next leak
- (8) Back to the leakage overview
- (9) This leakage move to another company, building or project
- (10) This leakage copy into another company, building or project
- (11) Extinguish this leakage
- (12) Save changes



The screenshot shows a software interface for managing leakage data. On the left, there's a camera view showing a leak at a pressure regulator. The main area is divided into several sections:

- Project Master Data:** This section is highlighted with a red box. It contains fields for:
 - Cost: 20,000
 - Currency: €
 - Unit: m³/h
 - Annual operating hours per year: 8760
 - Compressed air cost: 14.40 €/1,000 m³
 - Leakage rate: 3,425
 - Unit: ltr/min
 - Cost per year: 23,922
 - Comment: no comment
 - Priority: Medium
- Report under Pressure:** This section contains fields for:
 - Leaking element: pressure regulator
 - Reason: Change seal
 - Spare Part: (empty)
 - Note: (empty)
 - Status: In Progress
 - Solved on: (empty)
 - Solved by: (empty)

At the bottom, there are several buttons: BACK, PREVIOUS LEAK, NEXT LEAK, and a large SAVE button.

Project master data filled in:

This figure shows the parameters with which the compressed air costs per year are calculated, the leakage.

When project master data is set, it is used to calculate the cost of each leak within the project.

The field highlighted in red shows the parameters used for the leakage detector. If project master data are set, these fields are grayed out and locked for editing.

If the unit of measurement is changed from [ltr/min] to [cfm], an automatic conversion takes place and vice versa.

Project Master Data

Annual Operating Hours per year: 8,760 h
Compressed Air Cost: 14.40 € / 1,000 m³

Cost	Currency	Unit
20,000	€	/ 1000 m ³
Annual Operating Hours per year		
8760		
Leakage Rate		Unit
3,425	ltr/min	
Cost per Year		
25.922		

Project master data is empty:

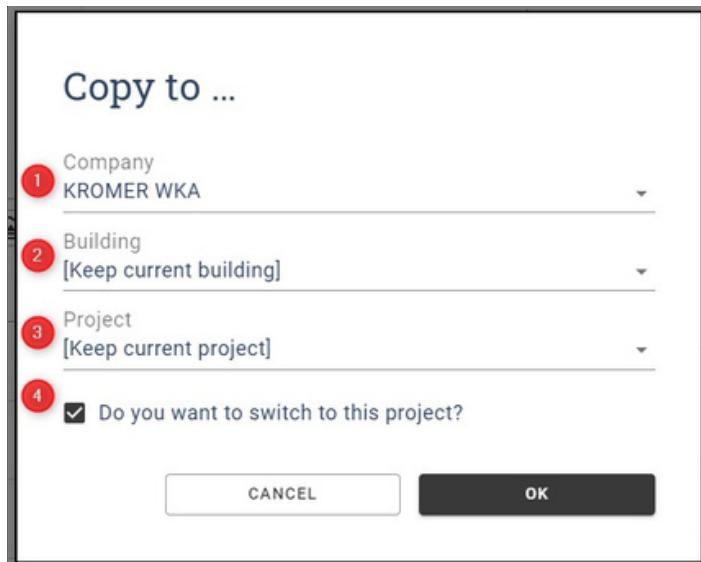
Cost	Currency	Unit
20,000	€	/ 1000 m ³
Annual Operating Hours per year		
31		
Leakage Rate		Unit
3,425	ltr/min	
Cost per Year		
25.922		

If no project data is recorded, the data can be changed in the measurement. The calculation in the formula above, is done with the data from the measurement. The fields are now white and thus free for input.



With the buttons a measurement can be moved, copied, deleted or saved be

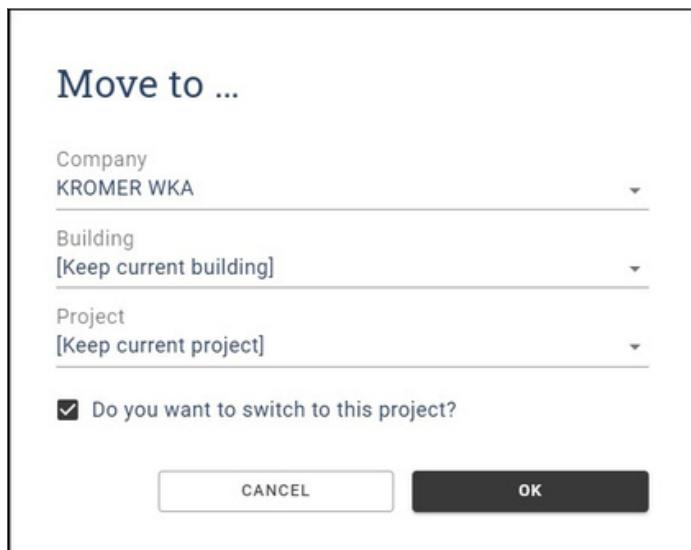
When copying leaks, the following dialog is displayed:



- (1) Company in which the leakage(s) are to be copied
- (2) [Keep current building] Building with the name will be created if it does not already exist.
- (3) [Keep current project] new project in the company will be created with the same name if it does not exist yet
- (4) Target project is displayed after the copy process

When moving leaks, the following dialog is displayed:

As with moving, the fields can be filled in analogously. After copying, correspondingly selected leakages are in both projects.



Before a measurement is finally deleted, this message is displayed:

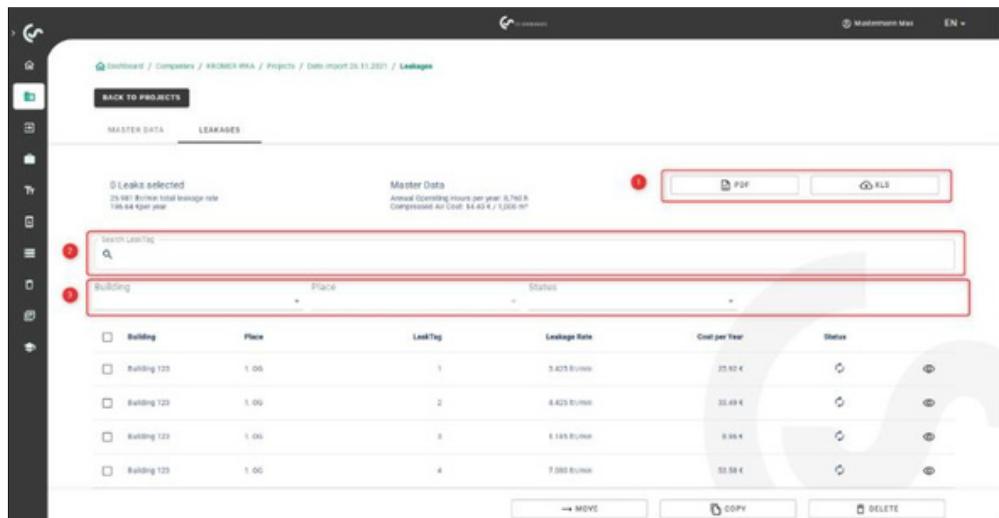


Notice:

If a leak has been accidentally deleted, it can be restored from the recycle bin.

8.6. Create report

- (1) A report can then be created in the measured value list for the project.
- (2) The marked or filtered leakages or even all measurements are then transferred to the report.
- (3) The sorting of the leakages is taken into account in the report.
- (4) The selected auditor is displayed on the cover sheet



Structure of the report:

1. Cover sheet (page 1):

The PDF report consists of a cover sheet with information about

- the customer, auditor
- Project master data
- Measurement results

2. Leakage overview (following pages)

Per leakage is shown:

- Location
- Potential savings
- Troubleshooting included
- Status and priority

Overview page (final page):

- Measurement results

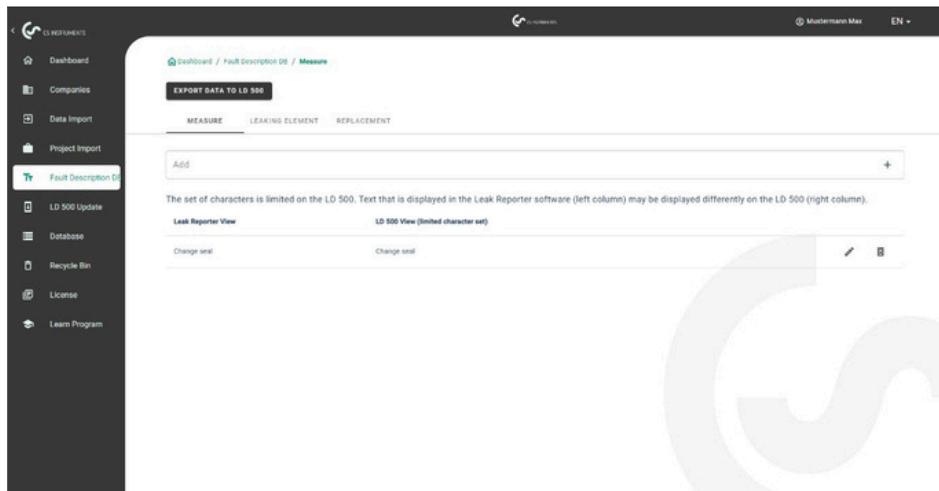
Excel Report

This report shows essentially the same information as the PDF report.

8.7. Leakage repair DB

With the Leak Reporter Cloud Solution, you can generate the bug fix database for the LD 5X0.

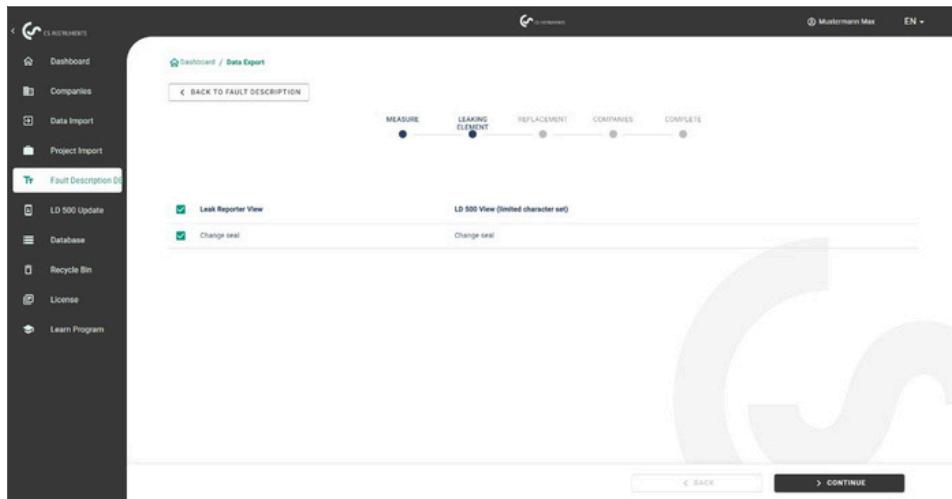
With each import, the Leak Reporter Cloud Solution expands the database with the entries in the XML file of the leak. Additionally, you can add manual inputs.



Attention:

The LD 5X0 can only display strings with a certain length and a limited character set. If the input is too long, the Leak Reporter Cloud Solution truncates it so that it can be imported into the LD 5X0.

In the export process you can select which data the XML file to be exported should contain:



The exported database has a maximum length of 1000 elements. If this size is exceeded, there will be a maximum of 1000 elements in the XML file.

To import the data into the LD 5X0, save the ZIP file on the supplied USB stick and unpack it there.

If you have inserted the USB stick into the LD 5X0, you can update the database of the LD 5X0 under:

- (1) LD 5X0 Export/Import
- (2) Import: Database
- (3) Select XML file in customers folder
- (4) Define areas

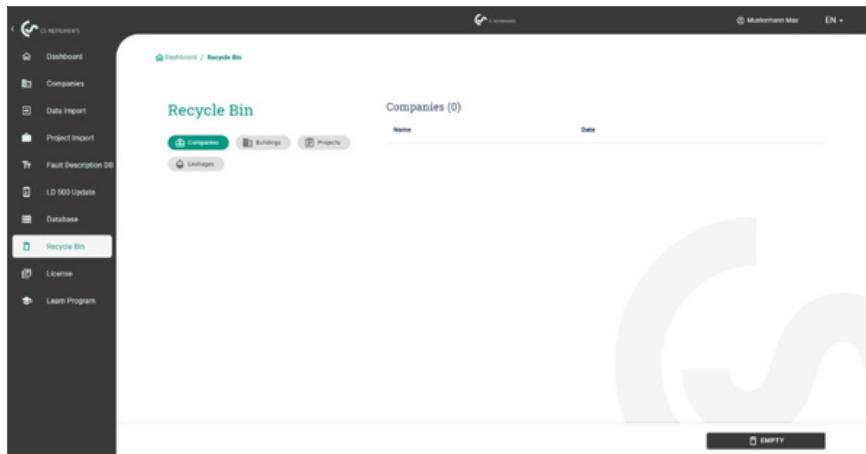
8.8. Recycle bin

The recycle bin is where deleted items are temporarily stored. This applies to:

- Companies
- Building
- Projects
- Leakage

If an object has been deleted by mistake, it can be restored by clicking the "Move" button.

A random number combination is appended to the original file name in the recycle bin so that there can be no collision with existing data when restoring. This name can be flexibly adjusted afterwards.

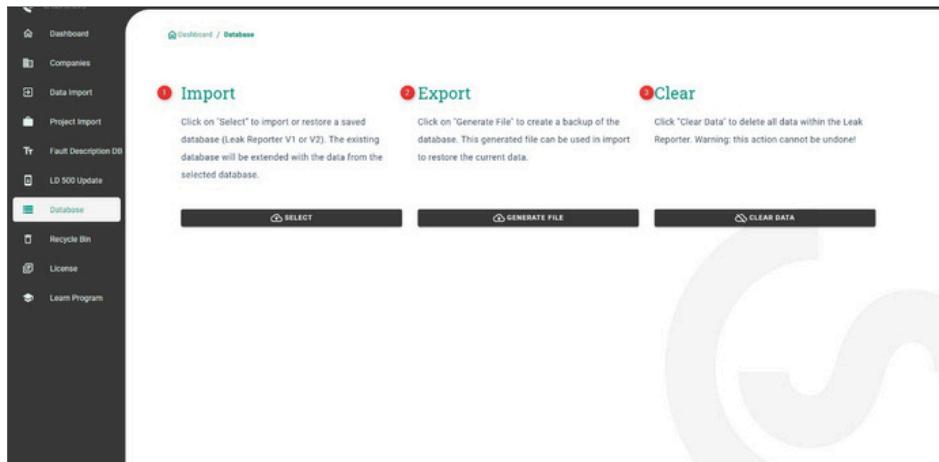


When "Empty Trash" is pressed, the entire Trash is deleted, but individual items in the categories (Companies, Buildings, Projects and Leaks) can also be deleted.

8.9. Database

Leak Reporter Cloud Solution creates regular backups, you can additionally create security backups after critical changes.

Note: Since the current database is deleted during an import, only [Users] with the [Admin] role have access to these functions.



Using "Import database", you can restore the previously exported data status of the CS Leak Reporter V1, V2 and Cloud Solution. To do this, import the database (ZIP file) that has **not yet been unpacked**.

- (2) Using "**Export** database" you can create a backup file that saves the current information status of the CS Leak Reporter Cloud Solution.
- (3) Using "**Clear Database**" you can delete all data within the CS Leak Reporter Cloud Solution.

Attention:

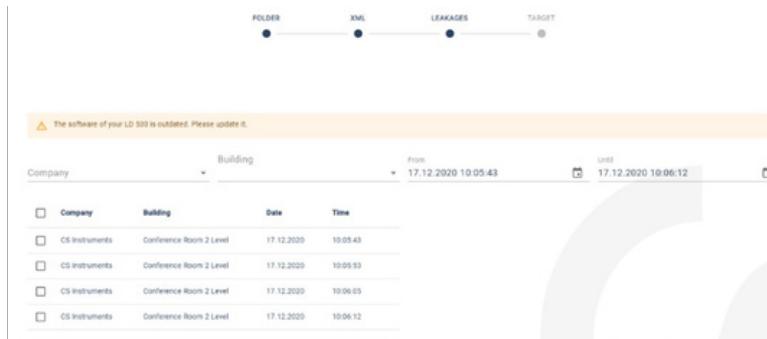
Please make sure that you do **not** unpack the Leak Reporter V1 database and import the ZIP file directly into the Leak Reporter Cloud Solution. In addition, Leak Reporter V1 must be at least at release level 1.3.7.

8.10. Update overview

CS INSTRUMENTS is continuously working on the firmware of the leak detector - therefore new firmware versions are published regularly.

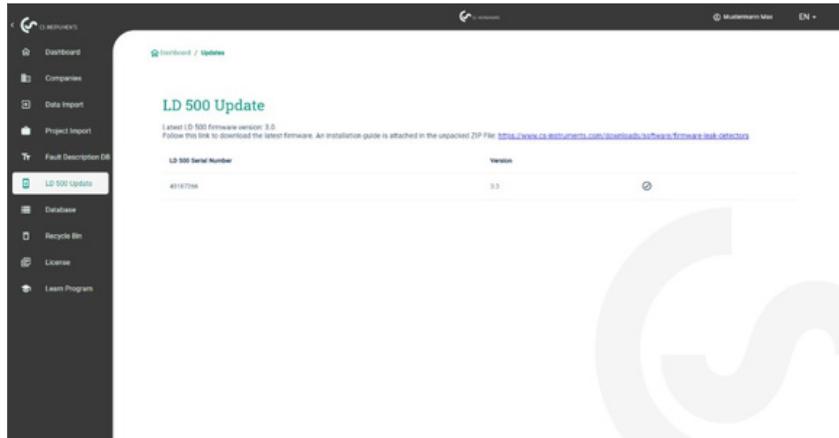
To keep the LD 5X0 up to date, updating the device is strongly recommended. During data import, the XML journal is checked and thus the firmware used for the corresponding device is saved.

If the firmware used is out of date at the time of export, this will be indicated as follows:



Company	Building	Date	Time
CS Instruments	Conference Room 2 Level	17.12.2020	10:05:43
CS Instruments	Conference Room 2 Level	17.12.2020	10:05:53
CS Instruments	Conference Room 2 Level	17.12.2020	10:06:05
CS Instruments	Conference Room 2 Level	17.12.2020	10:06:12

The following overview shows the current firmware version(4.04) and the used versions of the corresponding serial numbers.



LD 500 Serial Number	Version
40187706	4.04

The latest firmware can be downloaded from the following link:

<https://www.cs-instruments.com/de/downloads/software/firmware-leckage-suchgeraete>

8.11. Learning program

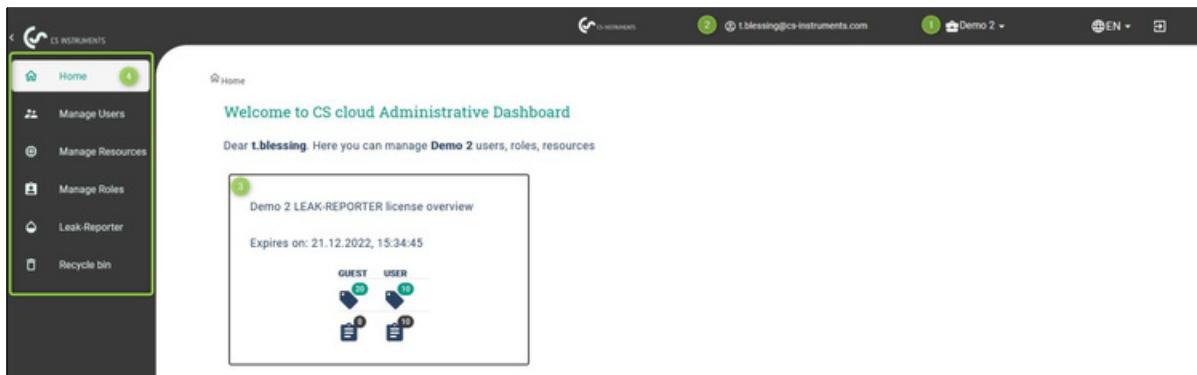
This tile in the dashboard takes you to the CS INSTRUMENTS homepage. There you will find all relevant information about the LD 5X0 and the CS Leak Reporter Cloud Solution at a glance. The following link is called: <https://www.cs-instruments.com/de/downloads/tutorials-videoanleitungen/professionelle-lecksuche-in-druckluftsystemen>

9. User and access management [Permissions]

9.1. Introduction

You can reach the user and access management both via the

- Leak Reporter Cloud Solution
- CS ID User Profile (license activation and personal data maintenance)



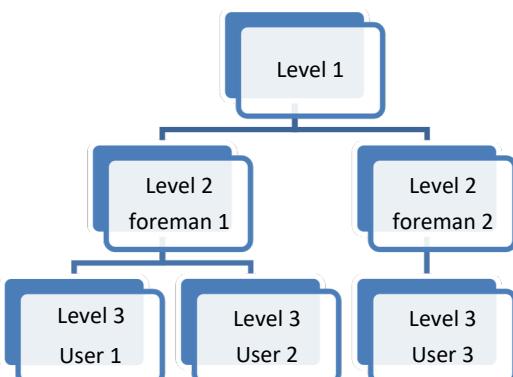
1. Organization - in which you are currently working
2. The logged in user account
3. Number of licenses purchased and available capacity
4. User and access management main menu bar

9.2. User management

9.2.1. A user hierarchy can be created within the software.

Process:

1. The system admin becomes who uses the purchased license to create an organization
 - a. The system admin always has access to all data of an application and can use all functions without restrictions
 - b. The system admin sees all users and can edit all users
2. Subordinate users have at most the access or the rights of their superiors
3. Higher-level users have access to the data of lower-level users and can manage them



Level 1: TheSystem Admin

- cansee and edit all users (**top instance**)
- hasaccess to all data within the application (Companies>Projects)

Level 2: Theforeman 1

- cansee and edit user 1 and user 2.
- Hasaccess to the data assigned to him by the system admin (direct supervisor)

 Foreman 2

- can see and edit user 3
- Has access to the data assigned to him by the system admin (direct supervisor)

Level 3: User1

- cannot see and edit other users
- Has maximum access to the data and rights of the foreman 1 (direct supervisor)

 User2

- cannot see and edit other users
- Has maximum access to the data and rights of the foreman 1 (direct supervisor)

 User3

- cannot see and edit users
- Has maximum access to the data and rights of the foreman 2 (direct supervisor)

9.2.2. User overview

In the user overview, one user gets an overview of who has created and is allowed to edit the other users. By default, this is the system administrator.

Users who do not have subordinate users will see only themselves in this window.

Administrator's view:



Email	Origin	Company	Advanced Permissions	Application	Username	Registered User	Login		
t.blessing@cs-instruments.com	intern	CS Instruments	Users and roles	leak-reporter	Admin	<input type="checkbox"/>	<input type="checkbox"/>		
[REDACTED]	intern	CS Instruments GmbH & Co KG	Users and roles	leak-reporter	Technician	<input type="checkbox"/>	<input type="checkbox"/>		
[REDACTED]	intern	CS Instruments GmbH & Co KG	Users and roles	leak-reporter	Technician	<input type="checkbox"/>	<input type="checkbox"/>		
[REDACTED]	intern	CS	Users and roles	leak-reporter	Technician	<input type="checkbox"/>	<input type="checkbox"/>		
[REDACTED]	intern	CS Instruments GmbH & Co KG	Users and roles	leak-reporter	Technician	<input type="checkbox"/>	<input type="checkbox"/>		

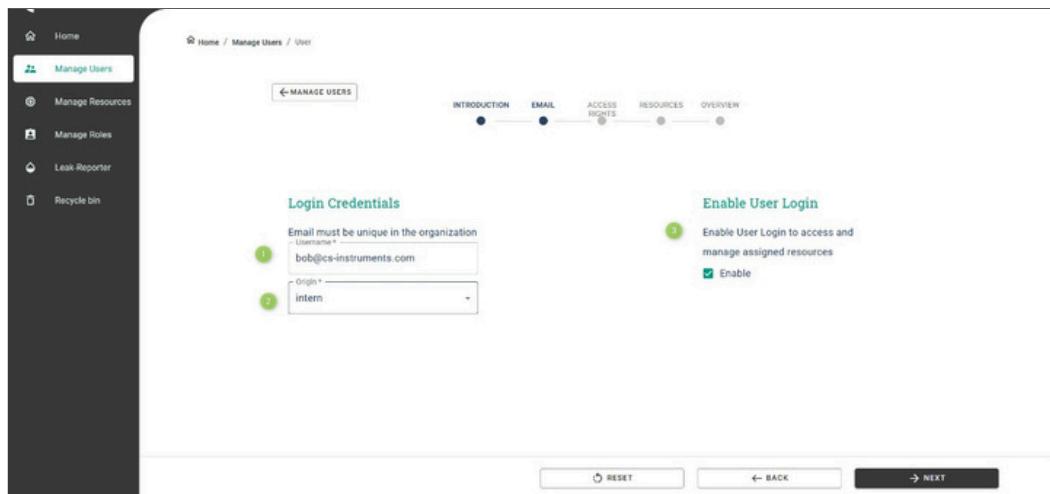
The table shows the relevant information of each CS-ID Profile account

1. The filters shown can be used to search specifically for users
2. Used **e-mail address** of the user
3. Is the user part of your own organization? **Status**: (internal or external)
4. Specified **company** of the user
5. Assigned **access rights** of the user by the parent person (usually admin).
6. Which **application does** the user have access to?
7. What is the user's **role** within the application?
8. **Registered user**: A CS-ID Profile account was created with the email address
9. Login: The user can log in or not log in to the software.
- a. Status inactive The account does **not** use a user or guest license
- b. Status active The account uses a user or guest license
10. If you have the right to create or edit users, you can do so here via the
 - a. Pen: Edit user
 - b. Recycle bin: delete user
 - c. Eye: View of the user's configuration
11. If you have the right to create users, you can create users.

9.2.3. Create a user

The information seen in the overview is defined when a user is created, or when an existing user is changed. Consequently, the process is the same, except that when changing, the current content is shown. Step 1 [Email]

1. Enter the e-mail address of the user
 - a. This person will receive an invitation email at the end of the process
2. Define whether the user is employed internally or externally
3. Login allowed: The user can login if the checkmark is set
 - a. Allowed The account uses user or guest license
 - b. Not allowed The account does **not** use a user or guest license



Manage Users

Home / Manage Users / User

MANAGE USERS

INTRODUCTION EMAIL ACCESS RIGHTS RESOURCES OVERVIEW

Login Credentials

Email must be unique in the organization

Username: bob@cs-instruments.com

Origin: intern

Enable User Login

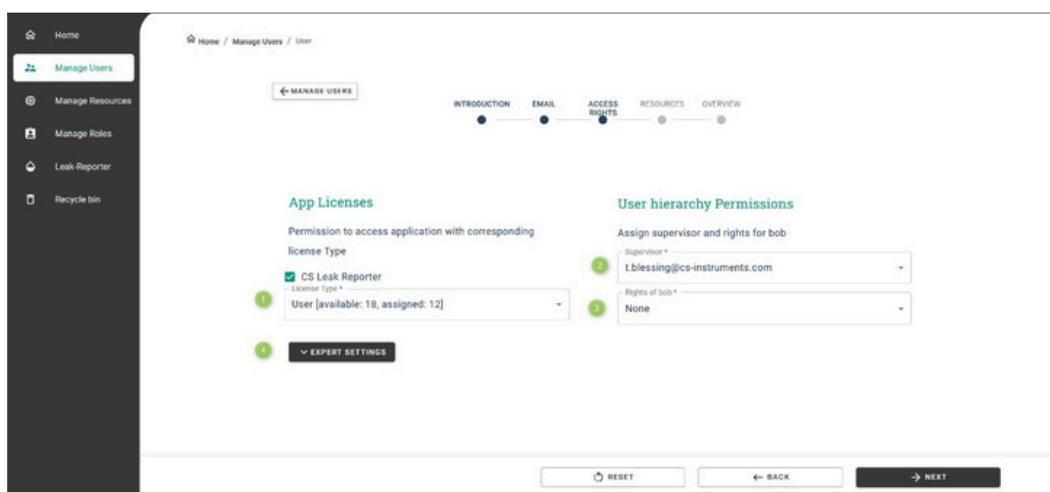
Enable User Login to access and manage assigned resources

Enable

RESET BACK NEXT

Step 2 [Access rights]:

1. Choose license type
 - i. User license = (freely selectable access rights to users and roles / within the application are the following roles (Leak Reporter= Guest, Technician, Admin).
 - ii. Guest license = (no access rights for users and roles / within the application the following role is assigned (Leak Reporter = Guest)
2. Superior
3. Right of "Bob - the user to be created" within the users and access administration



Manage Users

Home / Manage Users / User

MANAGE USERS

INTRODUCTION EMAIL ACCESS RIGHTS RESOURCES OVERVIEW

App Licenses

Permission to access application with corresponding license Type

CS Leak Reporter

License Type: User [available: 18, assigned: 12]

User hierarchy Permissions

Assign supervisor and rights for bob

Supervisor: lblessing@cs-instruments.com

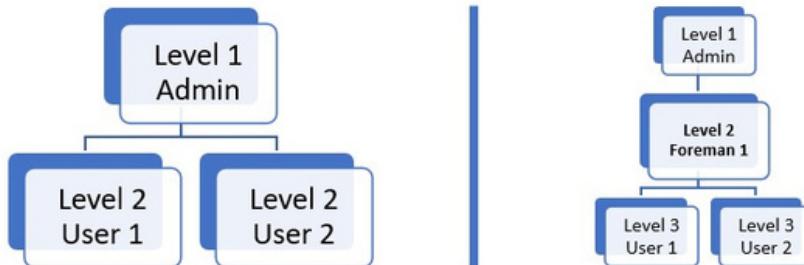
Rights of bob: None

EXPERT SETTINGS

RESET BACK NEXT

4. Under **More** a new hierarchy level can be defined, if desired, if the created user has atleast the right "Add user" under point 3

- User hierarchy **before** creating the current user [left].
- User hierarchy **after** creating the current user [right].



In the following window you can define for the created user which users can be managed by him and which rights he may assign.

Advanced Permissions

Permission to manage subordinate users and roles

Manageable Users *

Rights assignable by bob

[Manageable Users] - In the diagram shown, "Foreman 2" can now edit User 1 and User 2, which now slide into Level 3. "Foreman" is now their direct supervisor.

[Assignable rights] - These rights can now be passed on by the current user.

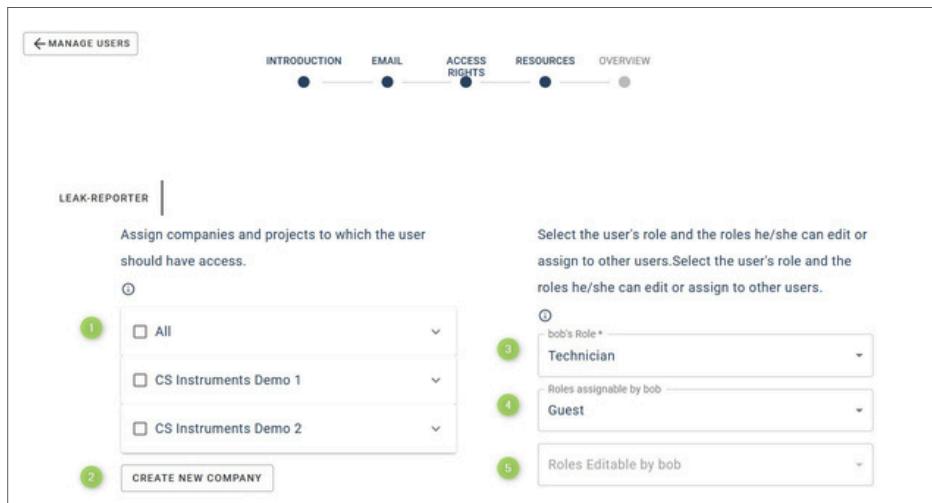
- No rights
- Add user
- Add users and roles

Users

None

Users and roles

Step 3 [Resources]:



INTRODUCTION EMAIL ACCESS RIGHTS RESOURCES OVERVIEW

LEAK-REPORTER

Assign companies and projects to which the user should have access.

1. All
 CS Instruments Demo 1
 CS Instruments Demo 2

2. CREATE NEW COMPANY

Select the user's role and the roles he/she can edit or assign to other users. Select the user's role and the roles he/she can edit or assign to other users.

3. bob's Role *
 Technician

4. Roles assignable by bob
 Guest

5. Roles Editable by bob

1. In the list you can select the companies and projects that the user to be created is allowed to see or edit depending on the role (point 3).

The selection of the companies is limited to the companies you are allowed to see and edit

- a. Selection [All]
- i. The created user sees **all** existing companies and projects **at the time of configuration**
- ii. The created user sees **all the** companies and projects that are created **according to the configuration of this user**
 - b. Selection [1 to n companies]
 - i. The created user sees **all existing projects of the selected companies at the time of configuration**
 - ii. The created user sees **all other projects** that are created **after the configuration of this user**
 - c. Selection [individual projects of individual companies]
 - i. The created user sees **only the selected companies and projects defined during configuration**
- Projects within the companies created **after the configuration**, the user does not see. Via [Create New Company] you can create a company which is then displayed in the **selected** set of the user defines which functions he/she can use. The following roles are available for the Leak Reporter Cloud Solution. Under the Role Management item, you can view the roles in detail and define your own roles if required
3.
 - a. Guest (can only view data)
 - b. Technician (has access to most functions)
 - c. Admin (access to all functions)

4. The created user can only assign roles if he is allowed to **add users**, see step 2 [Access rights]. You can define the assignable roles of the user here.
5. The created user can only edit roles if he is allowed to **add users and roles**, see step 2 [Access rights]. You can define the editable roles of the user here.

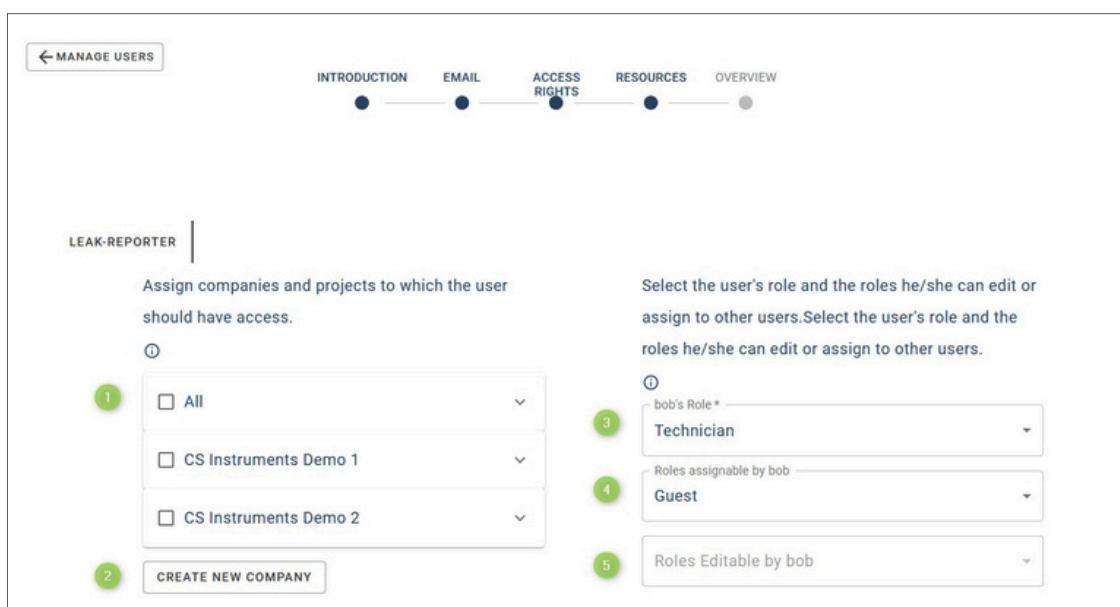
Step 4 [Overview]

Before the shown user is officially created, you can make a final check of its configuration in the last window.

You can see all the data at a glance:

1. Email and the status
2. Access rights to edit users and roles
 - a. License type: User
 - b. Application: "CS Leak Reporter"
 - c. User's right: "Add user"
3. Specific information within the application
 - a. Application: "CS Leak Reporter"
 - b. Role of the user: "Technician"
 - c. Assignable roles for Bob's created users: "Guest and Technician".
 - d. Available leakage data: All companies and their projects
4. If this is checked, an invitation email will be sent to the user. If he/she has created a CS-ID Profile account, he/she can use the Cloud Solution with the settings shown.

5. Click on [Save] the user is created and can be found in the user overview



MANAGE USERS

INTRODUCTION EMAIL ACCESS RIGHTS RESOURCES OVERVIEW

LEAK-REPORTER

Assign companies and projects to which the user should have access.

①

1 All

2 CS Instruments Demo 1

3 CS Instruments Demo 2

2 CREATE NEW COMPANY

Select the user's role and the roles he/she can edit or assign to other users. Select the user's role and the roles he/she can edit or assign to other users.

②

3 bob's Role * Technician

4 Roles assignable by bob Guest

5 Roles Editable by bob

9.2.4. Edit a user

If you want to edit in the user overview, click on the pencil in its row. The editing process corresponds to the invitation process of a user, only here the current settings are available and could be changed.



9.2.5. View of a user

If you want to view a user in the user overview, click on the eye in its row. The window is the same as in the overview before the final creation of the user.



9.3. Resource management

In the resource management you can see the companies shared with you, the number of users who have access to them, as well as the projects and buildings located in them.



Company	Users count	Projects count	Buildings count
CS Instruments Demo 1	10	1	12
CS Instruments Demo 2	10	1	4

9.4. Role management

The assigned role defines which functions a user may use within the application.

9.4.1. Standard Roles Leak Reporter Cloud Solution

In the application: Leak Reporter Cloud Solution the following roles are available by default

- Guest
- Technician
- Administrator



Rolename	description	Preconfigured	
Admin	Admin has full access rights to everything	yes	  
Guest	The guest is only allowed to view resources	yes	  
Technician	Can create and edit resources	yes	  

The parameterization can be viewed via the eye.

9.4.2. New role in Leak Reporter Cloud Solution

Individual roles can also be added by users with the corresponding right.



1. Role name - displayed when selecting the role of a user
2. Description - can be used as text to specify the purpose of the role
3. More: Expert Hiring



Here you can define directly,

- which user is allowed to edit and assign the role.
- The user sees here only the users that he is allowed to process himself.

Subsequently, it is defined which functions may be used by the role.

- The functions available here are limited to the rights of the user who creates the role
- Via the (i) you will be shown information about each point

Database	(i)
<input type="checkbox"/> access	
Company Data	
<input checked="" type="checkbox"/> read	<input type="checkbox"/> write
Project Data	
<input checked="" type="checkbox"/> read	<input type="checkbox"/> write
Leakage Data	
<input checked="" type="checkbox"/> read	<input type="checkbox"/> write
Leak data import	
<input type="checkbox"/> access	
Fault description database	
<input type="checkbox"/> access	
Documentation of Repair	
<input checked="" type="checkbox"/> read	<input type="checkbox"/> write

RESET
BACK
SUBMIT

There are dependencies between the following items:

Company data > Project data > Leakage data

If a role is to be able to modify company data, it must automatically also have the right to edit projects and leakages.

9.5. Recycle bin

Users and roles that have been deleted can be restored from the recycle bin. If they are deleted from the recycle bin, this is done irretrievably.

Recycle bin

 USERS	 ROLES
User Origin	



Trykluftshop ApS - 9200 Aalborg SV - Denmark + 82 10 70 20

www.trykluftshop.dk

