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enterprise

Portfolio View

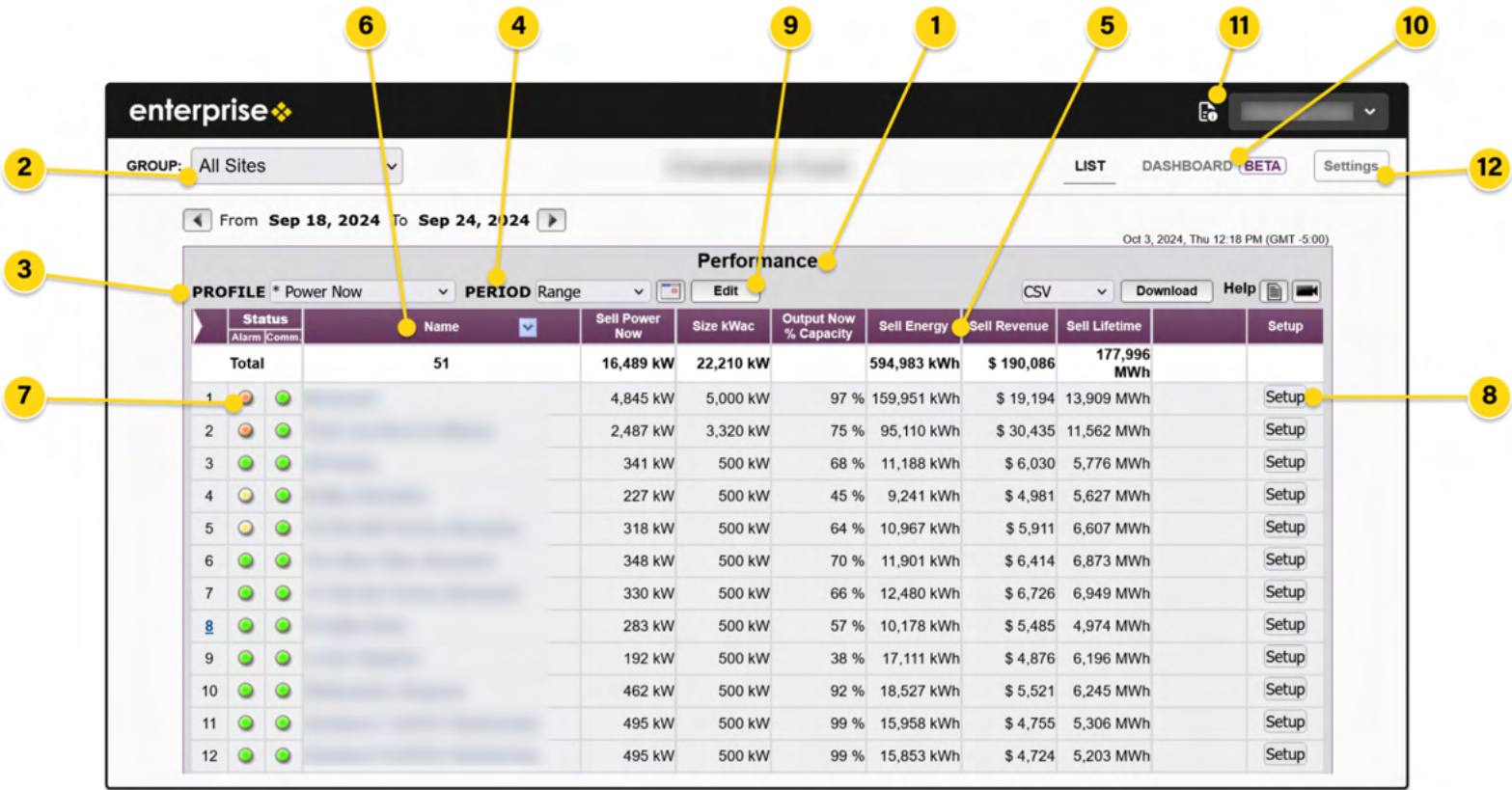
Guide Document

by  **Cachelan**

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LIST VIEW PAGE



1. PERFORMANCE: Monitor the online status of all sites, including fault alarms and communication health, in real-time. Choose from various parameters organized into profiles for any time period, such as current power output, energy production, and revenue. Generate reports based on these profiles to track key metrics and make informed decisions.

2. GROUP: View all sites on a single screen or organize a large portfolio into smaller, related groups for separate display. Only the sites in the selected group will be visible, with their totals shown for display and reporting.

3. PROFILE: Select parameters for display and reporting. You can create new profiles and name them to suit your personal preferences, allowing for a tailored view of the most relevant data.

4. PERIOD: Choose a time period of interest. Data is stored for the system's lifetime, and the values for the selected interval will be displayed, with totals conveniently shown in the first row.

5. PARAMETER: Customize profiles with over 25 available parameters. Sort sites in ascending or descending order by any parameter, or search for sites alphabetically by name.

6. NAME: Each site is identified by its default SolarVu® Portal web address, alias, and site name. You can sort sites by your preferred identification method. Clicking on the site name takes you directly to the site's energy portal for more detailed information.

7. COMMUNICATION & ALARM STATUS

- **Comm Light:**
 - Green: Internet connection is OK.
 - Red: No internet connection for the last 2 hours.
 - Yellow: Partial internet connection (check for weak cellular signals or intermittent ISP connections).
- **Alarm Light:**
 - Green: All devices are reporting OK.
 - Red: Issues such as inverter faults, low power alarms, combiner alarms, or no serial data (inverter off or connection problem).

Click on the status headings (Alarm or Comm) to sort sites by issues. If available, **maintenance notes can be accessed by clicking the site number**, providing a helpful history for O&M staff.

8. SETUP: To modify site settings, use the **Setup** button (administrator login required). Visitor login allows viewing but does not permit changes.

9. EDIT/CREATE PROFILE: Create or edit a profile by clicking the **Edit** button. This feature is available only to administrator accounts.

10. DASHBOARD: Access a summary of your portfolio's energy data on a single screen for quick and easy monitoring.

11. THE LEARNING CENTER: The Learning Center provides the latest updates, tutorials, and guide information from Cachelan, conveniently stored in one place for easy reference.

12. SETTINGS: Use the Enterprise Portfolio View settings button to update your password, assign a visitor passphrase, enable two-factor authentication, or modify the banner name, timezone, or background color.

GROUPS - CONFIGURATION

Customize your account by creating groups of sites for easier management. This is available through an administrator login.

The screenshot shows the 'My Portfolio' performance table. The 'Edit' button in the top right corner of the table is highlighted with a yellow circle and an arrow labeled '1'. The table has columns for Status, Name, Sell Power Now, Size kWac, Output Now % Capacity, Sell Energy, Sell Revenue, Sell Lifetime, and Setup.

Status	Name	Sell Power Now	Size kWac	Output Now % Capacity	Sell Energy	Sell Revenue	Sell Lifetime	Setup
Total	51	16,489 kW	22,210 kW		594,983 kWh	\$ 190,086	177,996 MWh	
1		4,845 kW	5,000 kW	97 %	159,951 kWh	\$ 19,194	13,909 MWh	Setup
2		2,487 kW	3,320 kW	75 %	95,110 kWh	\$ 30,435	11,562 MWh	Setup

The screenshot shows the 'Group' configuration table. The 'Add' button in the top right corner is highlighted with a yellow circle and an arrow labeled '3'. The table has columns for Group, Reference, Accounts, and Exit.

Group	Reference	Accounts	Exit
Group #1		11	Delete Edit
Group #2		16	Delete Edit
Group #3		11	Delete Edit
Group #4		8	Delete Edit
Group #5		12	Delete Edit
Group #6		10	Delete Edit
Group #7		9	Delete Edit
Group #8		9	Delete Edit
Group #9		22	Delete Edit
Group #10		2	Delete Edit
Group #11		43	Delete Edit


The screenshot shows the 'New Group' configuration form. The 'Group Name' field is highlighted with a yellow circle and arrow labeled '5'. The 'Reference' field is highlighted with a yellow circle and arrow labeled '4'. The 'Save' button is highlighted with a yellow circle and arrow labeled '6'. The 'Exit' button is highlighted with a yellow circle and arrow labeled '7'. There is also a 'Help' button.

The screenshot shows the 'My Portfolio' performance table with a dropdown menu open. The 'New Group' option in the dropdown menu is highlighted with a yellow circle and an arrow labeled '8'. The table has columns for Name, Sell Power Now, Size kWac, Output Now % Capacity, Sell Energy, Sell Revenue, Sell Lifetime, and Setup.

Name	Sell Power Now	Size kWac	Output Now % Capacity	Sell Energy	Sell Revenue	Sell Lifetime	Setup
51	13,875 kW	22,210 kW		179,653 MWh	\$ 75,719,228	179,653 MWh	
	333 kW	500 kW	67 %	6,994 MWh	\$ 3,769,652	6,994 MWh	Setup
	260 kW	500 kW	52 %	6,646 MWh	\$ 3,581,975	6,646 MWh	Setup
	78 kW	100 kW	78 %	1,940 MWh	\$ 1,377,373	1,940 MWh	Setup
	201 kW	500 kW	40 %	5,005 MWh	\$ 2,697,504	5,005 MWh	Setup
	183 kW	499 kW	37 %	5,360 MWh	\$ 2,888,993	5,360 MWh	Setup
	315 kW	500 kW	63 %	6,915 MWh	\$ 3,727,027	6,915 MWh	Setup
	159 kW	250 kW	64 %	3,200 MWh	\$ 1,724,728	3,200 MWh	Setup

1. **Create/Edit Groups:** Click the **Edit** button to modify groups.
2. **Group Tab:** Access this tab to make changes to groups.
3. **Add Button:** Add, edit, or delete groups.
4. **Select Sites:** Choose sites to include in the group.
5. **Group Name & Reference:** Assign a meaningful name to appear in the dropdown menu and write a short reference (optional) for additional context.
6. **Save:** Save the group or exit without saving.
7. **Exit:** Return to the main screen after saving.
8. **Group Selector:** Select a group that you want to be displayed on the main screen of the Enterprise Portfolio View.

PROFILES - CONFIGURATION

enterprise  My Portfolio

GROUP: All Sites LIST DASHBOARD BETA Settings

From Sep 18, 2024 To Sep 24, 2024 Oct 3, 2024, Thu 12:18 PM (GMT -5:00)

1 Performance Edit CSV Download Help

Status	Name	Sell Power Now	Size kWac	Output Now % Capacity	Sell Energy	Sell Revenue	Sell Lifetime	Setup
Total	51	16,489 kW	22,210 kW		594,983 kWh	\$ 190,086	177,996 MWh	
1		4,845 kW	5,000 kW	97 %	159,951 kWh	\$ 19,194	13,909 MWh	Setup
2		2,487 kW	3,320 kW	75 %	95,110 kWh	\$ 30,435	11,562 MWh	Setup

2 Profile Group

Profile Name: My Reporting Delete 3

New Profile: Create 4

Layout: Portrait Landscape Help 5 Save 6 Exit

None None None None None None

- None
- SELL ENERGY**
- Sell Lifetime
- Sell Energy
- Sell Power Now
- Sell Revenue
- Sell Rate
- BUY ENERGY**
- Buy Lifetime
- Buy Energy
- Buy Power Now 4
- Buy Cost
- Buy Rate
- SITE SPECIFICATION**
- Size kWac
- Size kWdc
- Installation

Customize profiles by selecting relevant parameters from 40 available options. An administrator login is required to create or edit profiles.

1. **Create/Edit Profiles:** Click the **Edit** button to make changes.
2. **Profile Tab:** Access this tab to edit profiles.
3. **Create & Delete Buttons:** Create or delete profiles as needed and assign meaningful names like Revenue, Savings, or Output for easy identification.
4. **Assign Parameters:** Select parameters for every column to include in the profile.
5. **Save:** Save the profile or exit without saving.
6. **Exit:** Return to the Performance screen.

PARAMETER DEFINITIONS

Over 50 different parameters can be selected and arranged into various profiles for customized views and reports. Definitions are listed in the order of the selection pulldown menu in the Profile Setup.

Parameters	Units	Definition
SELL ENERGY		
Sell Lifetime	\$	Total revenue generated for the lifetime period.
Sell Energy	kWh	Total energy generated kWh for the selected period.
Sell Power	kW	Now Actual system power being generated now kW.
Sell Revenue	\$	Revenue = FIT rate x energy kWh for the selected period.
Sell Rate	\$/kWh	FIT sell rate entered in 'Setup'->'Sell Rate' used for revenue calculations.
BUY ENERGY		
Buy Lifetime	kWh	Grid energy used since startup. Only available if a grid meter is installed.
Buy Energy	kWh	Grid energy used for the selected period. Only available if a grid meter is installed.
Buy Power Now	kW	Grid power now. Only available if a grid meter is installed.
Buy Cost	\$	Grid energy * Buy power cost/kWh entered in 'Setup'->'Buy Rate'. Grid meter must be installed.
Buy Rate	\$	Grid energy * Average cost of power entered in 'Setup'->'Buy Rate'. Grid meter must be installed.
SITE SPECIFICATION		
Size kWac	kWac	Rated total AC output of system kW for 100% capacity.
Size kWdc	kWdc	Rated total DC solar panel kW. Usually greater than AC rating.
Installation	Date	Installation Date of startup used to calculate runtime.

Run Time	days	Runtime in days or years from initial startup date entered in 'Setup'->'SolarVu® Installation Date'.
PERFORMANCE		
Performance Ratio AC	%	Actual energy / (AC capacity * insolation) for the selected period.
Performance Ratio DC	%	Actual energy / (DC capacity * insolation) for the selected period.
Output Now % Capacity	%	Actual kWac output now / Rated kWac capacity of the system. Total inverter rated output in kWac is entered in 'Setup'->'Equipment'->'Inverter'.
Expected Energy	kWh	Requires Site Insolation. An approximation of energy expected for the selected time period factoring in the site size (Site size in kWpac * Insolation). Assumes insolation is PoA (Plane of Array) measurement (most WeatherTrak IMT's are). Contact Cachelan Tech Support to discuss more precise models.
Expected Revenue	\$	Revenue expected = Expected energy x Sell rate for the selected time period. Values for sell rate are in each portal's 'Setup', and can be modified there.
Output kWh/kWac/yr	kWh	Annual energy per kW of installed rated inverter output capacity. Normalized for comparing relative performance.
Output kWh/kWdc/yr	kWh	Annual energy per kW of installed total DC panel capacity. Normalized for comparing systems with different DC panel ratings.
Output FSH/day	kWh	Daily energy/AC capacity expressed in FSH (Full Sun Hours). Energy from one FSH is the energy the system would produce for 1 hour of irradiance at 1000W/m ² (STD).
Solar Map kWh/kWac/yr	kWh	Expected annual energy per kW of installed AC capacity based on historical records of horizontal insolation.
Solar Map FSH/Day	FSH	Expected daily energy expressed in FSH per kW of installed AC capacity based on the solar map value entered in 'Setup'->'Account'->'Insolation' for this location.
Output % Solar Map	%	Actual energy / expected energy annual from a solar map for this location (entered in 'Setup'->'Account'->'Insolation') for the selected period.
Output \$/kWac/yr	\$	Annual revenue / kWac rated system capacity. Normalized to allow comparing systems of different sizes to see which produces more revenue.

Output \$/kWdc/yr	\$	Annual revenue / kWdc rated installed DC panel capacity. Normalized to compare systems with different size DC panel ratings.
% Green Power	%	$(S-G)/S * 100$ where S= Solar Power kW now, G=grid power kW now. Only available on systems that measure both solar and grid generation. 100% means all power used is coming from solar generation.
% Green Energy	%	$(S-G)/S * 100$ where S= Solar Energy kWh, G=grid energy kWh over the selected time period. Only available on systems that measure both solar and grid generation. 100% means all energy used during the time period came from solar generation.
Forecast Energy	kWh	Values from entered in 'Setup->'Performance'-'>'PVsyst' from the PVsyst report for expected energy for the selected period. Contact Cachelan for assistance or if you have questions.
Forecast Insolation	kWh/m ²	Value entered in 'Setup->'Performance'-'>'PVsyst' from the PVsyst report for the expected insolation based on solar map values for the selected period. Used for comparing measured irradiance to assumed irradiance from the PVsyst model.
Forecast Revenue	\$	Expected revenue = FIT rate * PVsyst forecast energy for the selected period. Used for calculating performance by comparing actual to expected.
Energy kWh Variance <i>(previously Energy kWh Variance)</i>	kWh	Actual energy - PVsyst forecast energy. PVsyst values must be entered in 'Setup->'Performance'-'>'PVsyst'. Positive values indicate better than expected performance.
Energy Forecast % Variance <i>(previously Energy % Variance)</i>	%	Actual energy / PVsyst forecast energy. PVsyst values must be entered in 'Setup->'Performance'-'>'PVsyst'. Positive values indicate better than expected performance.
Expected Energy kWh Variance	kWh	Actual Energy-Expected Energy. Expected Energy requires insolation site data, and this represents the difference between actual generation and generation based on a simple weather adjusted model. Contact Cachelan support for enhanced models.
Expected Energy % Variance	%	Actual Energy / Expected Energy. Expected Energy requires insolation site data. Contact Cachelan support for enhanced models.
Insolation Variance	kWh/m ²	Measured insolation - PVsyst Expected insolation. PVsyst insolation values from a solar map must be entered in 'Setup->'Performance'-'>'PVsyst'.
Insolation % Variance	%	Actual insolation / PVsyst forecast insolation. PVsyst values must be entered in 'Setup->'Performance'-'>'PVsyst'. Positive values indicate more insolation (sunlight energy) received than expected for the selected period.
Revenue \$ Variance	\$	Actual revenue / (PVsyst expected energy * FIT rate). Positive values indicate higher than expected revenues for the selected period.
Revenue % Variance	%	Revenue / Expected revenue as calculated by the PVsyst model. Positive values indicate better than expected performance for the selected period.
PowerWatch™		
Power Ratio Yesterday		Lowest inverter power / highest inverter power at 12PM yesterday.

Energy Ratio Yesterday		Lowest inverter energy yesterday / highest inverter energy yesterday.
Energy Ratio Today		Lowest inverter power / highest inverter power today. NA displayed if not available.
kWh/kWac Yesterday		Total energy / rated AC capacity yesterday. Used to compare relative output of different size systems.
Actual FSH Yesterday		Amount of insolation received yesterday in FSH (full sun hours). 1 FSH = 1000 w/m ² .
Performance Ratio AC Yesterday		Actual energy / (AC capacity * insolation) for yesterday. Shows actual to expected output.
Performance Ratio DC Yesterday		Actual energy / (DC capacity * insolation) for yesterday. Shows actual to expected output.
WeatherTrak™		
Irradiance Now	W/m²	Measured irradiance at the site now from the WeatherTrak™ sensor.
Insolation	kWh/m²	Measured insolation for the selected period from the WeatherTrak™ sensor.
Lifetime Insolation	kWh/m²	Insolation (sunlight energy) measured by the WeatherTrak™ sensor since system startup.
Sun % Now	%	Takes measured Irradiance and divides by 1000 W/m ² , to generate a % of 'Sunniness' as last measured. Like 'Power Now', this value is not affected by time range selectors and represents the current / most recent value.
Power vs Sun Now Δ	%	Takes a sites 'Power Now' (generation) % of Capacity, subtracting Sun % Now. A 50% power rating of capacity, measured at 500 W/m ² , (50% Sun Now) will show as 0%.
SAVINGS		
Savings GHG lb	lb	Energy generated for the selected period is converted to the amount of GHG (greenhouse gas) that would be produced burning fossil fuels to generate the same energy. The conversion rate varies by location and can be changed in 'Setup->'Account'->'System Parameters'.
Savings EV km	km	Energy generated for the selected period is converted to the distance a typical EV could drive assuming 5km/kWh conversion rate.
Savings Gasoline litre	litres	Energy generated for the selected period is converted to the amount of gasoline that would be required to produce the same energy.
Savings Notebook hr	hours	Number of hours a typical notebook computer that uses 25W could run from the energy generated over the selected period.
Revenue % Variance	%	Revenue / Expected revenue as calculated by the PVsyst model. Positive values indicate better than expected performance for the selected period.
HISTORY		
Views		A measure of how much use the SolarVu® Portal is getting. Each time a new visitor accesses the portal the view counter is incremented by 1.
Last Visit		Date the SolarVu® Portal was accessed on. Use this to determine if the site is still being actively used.

REPORTS & DOWNLOADS

CREATE REPORTS & DOWNLOAD DATA

Create PDF reports for groups of sites, sorted with different parameters including totals, for any selected time period. Use this to compare sites to each other, check utility payments and do accounting audits. For performance analysis, site data can be exported as a CSV file for further custom analysis in a spreadsheet or imported into a database.

The screenshot shows the 'My Portfolio' dashboard. At the top left, a dropdown menu labeled 'GROUP' is set to 'All Sites' (callout 1). Below it, a date range selector shows 'From Sep 18, 2024 To Sep 24, 2024'. The main section is titled 'Performance' and includes a 'PROFILE' dropdown set to 'Power Now' (callout 2), a 'PERIOD' dropdown set to 'Range' (callout 3), and a 'Format' dropdown set to 'CSV' (callout 4). A 'Download' button is highlighted with callout 5. The table below shows performance metrics for 51 sites in total, with two individual site rows shown below.

Status	Name	Sell Power Now	Size kWac	Output Now % Capacity	Sell Energy	Sell Revenue	Sell Lifetime	Setup
Total	51	16,489 kW	22,210 kW		594,983 kWh	\$ 190,086	177,996 MWh	
1		4,845 kW	5,000 kW	97 %	159,951 kWh	\$ 19,194	13,909 MWh	Setup
2		2,487 kW	3,320 kW	75 %	95,110 kWh	\$ 30,435	11,562 MWh	Setup

Power Now

Num	Name	Sell Power Now	Size kWac	Output Now % Capacity	Sell Energy	Sell Revenue	Sell Lifetime	Lifetime
Total	49	14,074 kW	21,980 kW		172,439 MWh	\$ 75,579,213	172,439 MWh	
1		380,984 W	500 kW	76.2 %	6,995 MWh	\$ 3,770,221	6,995 MWh	
2		345,104 W	500 kW	69.0 %	6,647 MWh	\$ 3,582,468	6,647 MWh	
3		84,106 W	100 kW	84.1 %	1,940 MWh	\$ 1,377,556	1,940 MWh	
4		236,304 W	500 kW	47.3 %	5,005 MWh	\$ 2,487,864	5,005 MWh	
5		225,996 W	499 kW	45.5 %	5,361 MWh	\$ 2,889,320	5,361 MWh	
6		349,578 W	500 kW	69.9 %	6,916 MWh	\$ 3,727,547	6,916 MWh	
7		158,000 W	250 kW	63.2 %	3,200 MWh	\$ 1,724,993	3,200 MWh	
8		83,675 W	160 kW	52.3 %	1,544 MWh	\$ 832,360	1,544 MWh	
9		140,000 W	250 kW	56.0 %	3,259 MWh	\$ 1,756,492	3,259 MWh	
10		14,363 W	50 kW	28.8 %	168,834 kWh	\$ 25,325	168,834 kWh	
11		79,801 W	150 kW	53.2 %	1,529 MWh	\$ 824,143	1,529 MWh	
12		5,391 W	10 kW	53.9 %	54,917 kWh	\$ 6,589	54,917 kWh	
13		156,800 W	500 kW	31.4 %	5,243 MWh	\$ 1,562,520	5,243 MWh	
14		160,680 W	500 kW	32.1 %	5,346 MWh	\$ 1,593,115	5,346 MWh	
15		91,690 W	500 kW	18.3 %	5,048 MWh	\$ 1,504,189	5,048 MWh	
16		125,250 W	500 kW	25.1 %	5,122 MWh	\$ 1,526,407	5,122 MWh	
17		150,730 W	500 kW	30.1 %	5,299 MWh	\$ 1,579,224	5,299 MWh	
18		313,450 W	500 kW	62.7 %	5,087 MWh	\$ 1,515,874	5,087 MWh	
19		198,320 W	500 kW	39.7 %	5,241 MWh	\$ 1,561,677	5,241 MWh	
20		2,634,521 W	3,320 kW	79.4 %	11,792 MWh	\$ 3,773,515	11,792 MWh	
21		38,201 W	100 kW	38.2 %	990,496 kWh	\$ 520,871	990,496 kWh	

PDF Format

My Portfolio
Report Date: Oct 22, 2024, Tue 1:53 PM (GMT -5:00)

Num	Name	Sell Power Now	Size kWac (W)	Output Now % Capacity	Sell Energy (kWh)	Sell Revenue	Sell Lifetime (kWh)
1		380984	500000	76.2	6994846	3770221	6994846
2		345104	500000	69	6646509	3582468	6646509
3		84106	100000	84.1	1940219.905	1377556	1940219.905
4		236304	500000	47.3	5005314.125	2497864	5005314.125
5		225996	499000	45.5	5360519.792	2889320	5360519.792
6		349578	500000	69.9	6915709	3727547	6915709
7		158000	250000	63.2	3200358.092	1724993	3200358.092
8		83675	160000	52.3	1544268.05	832360	1544268.05
9		140000	250000	56	3258797.945	1756492	3258797.945
10		14393	50000	28.8	168834	25325	168834
11		79801	150000	53.2	1529023.117	824143	1529023.117
12		5391	10000	53.9	54916.529	6589	54916.529
13		156800	500000	31.4	5243356	1562520	5243356
14		160680	500000	32.1	5346023.596	1593115	5346023.596
15		91690	500000	18.3	5047615.364	1504189	5047615.364
16		125250	500000	25.1	5122172.038	1526407	5122172.038
17		150730	500000	30.1	5299410.701	1579224	5299410.701
18		313450	500000	62.7	5086826.869	1515874	5086826.869
19		198320	500000	39.7	5240529	1561677	5240529
20		2634521	3320000	79.4	11792236	3773515	11792236
21		38201	100000	38.2	950495.772	520871	950495.772
22		134340	200000	67.2	2118853.235	1142061	2118853.235
23		168529	250000	67.4	2582216.15	849549	2582216.15

CSV Format

- GROUP SELECTOR:** Choose the group for which you want to generate the report.
- PROFILE:** Select the profile that will be used for the report.
- PERIOD:** Choose the time period for the report.
- FORMAT:** Select **PDF** for a formatted report or **CSV** for a file that can be imported into a spreadsheet for further analysis.
- DOWNLOAD:** Click the **Download** button and choose the destination folder for saving the report.

ENTERPRISE PORTFOLIO VIEW - SETTINGS

Make adjustments to your Enterprise Portfolio account by clicking the **SETTINGS** button. While the username is fixed, the administrator password can be changed, a separate visitor login can be enabled for read-only access without allowing any changes to site settings.

The screenshot shows the 'Performance' section of the Enterprise Portfolio interface. At the top right, the 'Settings' button is highlighted with a yellow circle and the number 1. The page displays a table of performance data for various sites.

Status	Name	Sell Power Now	Size kWac	Output Now % Capacity	Sell Energy	Sell Revenue	Sell Lifetime	Setup
Total	51	16,489 kW	22,210 kW		594,983 kWh	\$ 190,086	177,996 MWh	
1		4,845 kW	5,000 kW	97 %	159,951 kWh	\$ 19,194	13,909 MWh	Setup
2		2,487 kW	3,320 kW	75 %	95,110 kWh	\$ 30,435	11,562 MWh	Setup

The screenshot shows the 'Account Setting' page with various configuration options. Numbered callouts (2-10) point to specific fields and buttons:

- 2**: Points to the 'Current Password' field in the 'Login' section.
- 3**: Points to the 'New Password' field in the 'Login' section.
- 4**: Points to the 'Visitor Link' field in the 'Visitor Login' section.
- 5**: Points to the 'New Email' field in the 'Primary Account Email' section.
- 6**: Points to the 'Enable Two-Factor Authentication' checkbox in the 'Primary Account Email' section.
- 7**: Points to the 'Banner Name' field in the 'Account Setting' section.
- 8**: Points to the 'Time Zone(GMT)' dropdown menu in the 'Account Setting' section.
- 9**: Points to the 'Background Color' dropdown menu in the 'Account Setting' section.
- 10**: Points to the 'Save' button at the bottom of the 'Account Setting' section.

- 1. SETTINGS:** Click the **SETTINGS** button to access and modify the Enterprise account. Administrator privileges and the administrator password are required for access.
- 2. ADMINISTRATOR PASSWORD:** Change the default administrator password by entering a new one and clicking **Save** in the login panel. The administrator password should only be shared with staff authorized to make changes to all sites. Note that each site also has its own unique **SETUP** login password, which differs from the Enterprise password.
- 3. VISITOR ACCESS:** Enable a visitor password for read-only access to the Enterprise account, which hides the **Setup** button for each site to prevent unauthorized changes. This is ideal for providing access to O&M staff. Ensure the visitor password is different from the administrator password.
- 4. DIRECT VISITOR LINK:** Check the **Enable** box to create a direct link to the Enterprise account that doesn't require a password for viewing access. This allows faster access with viewing-only capabilities and no ability to make changes. You can distribute this visitor link, which can be bookmarked in a browser for easy, single-click access to the account.
- 5. PRIMARY ACCOUNT PASSWORD:** If you forget your password, click the **Forgot Your Password?** link on the login screen. The new password will be sent to the **Primary Email** you provide in the settings.
- 6. TWO-FACTOR AUTHENTICATION:** Enable two-factor authentication to add an additional layer of security to your Enterprise account.
- 7. BANNER NAME:** Enter the desired account name to display in the banner by typing it into the **Banner Name** box.
- 8. TIME ZONE:** Set the correct time zone for your region by entering the appropriate GMT offset. For example, GMT -5 for Eastern Standard Time (EST) in North America.
- 9. BACKGROUND COLORS:** Choose between black or white background styles for your Enterprise Portfolio View page based on your preference.
- 10. SAVE:** After making all desired changes, click the **Save** button to apply them immediately.