Manual connect:portal

Linde Material Handling

Imprint

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Applies from **connect:**portal release 2.13

www.connected-solutions.de

Service addresses

The service team will answer any questions about **connect**:portal.

Please send your questions in German or English to the following email address:

service.connect@linde-mh.de

To ensure your question is answered promptly, please provide the following information:

- Contact details
- Description of the problem
- Operating system
- Browser

On working days, questions will usually be answered by a member of the Service team within 24 hours.

On weekends and public holidays, please contact Linde Service or a Linde authorised dealer.

Table of contents

1. About this manual

The manual describes the usage and key functions of **connect:**portal.

Read the manual before using **connect:**portal!
Please observe the detailed user manual and tutorials on the website: www.connected-solutions.de

Symbols used

This symbol is used to identify particularly important information and warnings.

This symbol is used to identify cross-references and tips for using **connect:**desk.

Presentation of contents

- Lists are marked with bullet points.

1. Actions with a set sequence are set out in a numbered list.

» The result of an action is marked with a double arrow.

Names of clickable buttons and symbols are written *in colour* and *in italics*.

Names of boxes are written in **bold**.

Menu sequences are shortened:

1. Menu level 1\Other menu levels\Command

Example: Creating a user

- **Detailed description**

1. Click on *Administration* in the menu bar.
2. Position the cursor over *Entities*.

» The menu will drop down.

3. Position the cursor over *Users*.

» The menu will drop down.

4. Click on *Create*.
5. This will open a dialog.
6. ...

- **Shortened description**

1. Administration\Entities\Users\Create
2. This will open a dialog.
3. ...

2. Software requirements

- Internet access
- Current web browser

3. Functional overview

connect:portal enables access via an Internet connection to operating hours and reports from trucks.

Operating hours and reports are recorded in the truck by a CDX unit and transmitted.

Using **connect:**portal, dealers and branches can register their trucks and read out CDX units.

connect:portal is a development of **connect:**hr and offers additional functions.

https://connect.linde-mh.com

4. Getting started

Creating an administrator

An administrator must be created for each dealer or branch.

Only administrators can create devices and users.

1. **Open connect:**portal.
2. Click on *Create a new account*.

» This will open a dialog.

3. Fill in the dialog fields.
4. Click on *Register*.

» The dialog will close.
A confirmation email to activate the administrator will be sent to the email address given.

5. Click on the activation link in the confirmation email.

» **connect:**portal will open.

6. Log in.

On initial login, accept the Terms of use.
The password should be changed after the initial login.

Logging in

1. **Open connect:**portal.
2. Enter the username and password.
   Pay attention to upper and lower case.
3. Click on *Login*.

» This will open the truck overview.

Changing the password

1. Extras\Preferences
2. **Change password:** open input screen.
3. Enter the new password twice.
4. Click on *Save*.

Choosing preferences

1. Extras\Preferences
2. Choose language, time zone, unit conversion and number format.
3. Click on *Save*.

Activating CDX unit

Requirements:

- Only administrators can activate CDX units.
- CDX S/N and security code for the CDX unit are known.

CDX S/N and security code are on the identification plate of the CDX unit. After assembling the CDX unit, the service engineer passes the completed assembly form to the administrator.

1. Service\Activation form
2. Enter CDX S/N.
3. Enter security code.
4. Accept Terms of Contract.
5. Click on *Add*.
   Additional CDX units can be added.
6. Click on *Send*.

» CDX unit is activated.

Creating a user

Only administrators can create users.

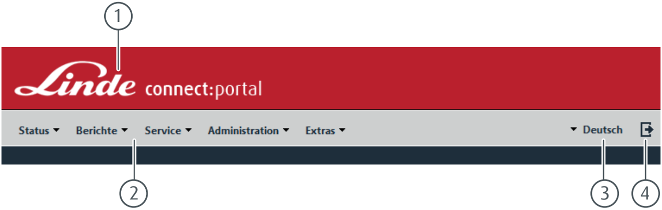
1. Administration\Entities\Users\Create

» This will open a dialog.

Each username can only be used once in **connect:**portal. If a username is already in use by a branch or dealer, change the username – e.g. by extending it.

2. Fill in the dialog fields.
3. Click on *Save*.
4. Quit the dialog.
5. Pass the login details to the user.

5. User interface



1	Click on the logo: this will open the truck overview
2	Menu bar: Open menus
3	Select language
4	Log out

Opening additional search

With the Additional search function, multiple search boxes can be used at the same time for a full text search.

1. Click on the *double arrow symbol* next to a search box.

» This will open the Additional search.

Sorting tables

Tables can be sorted based on a column.

1. Click on the *up/down symbol*.

» Column is sorted in ascending order.

2. Click on the *up/down symbol* again.

» Column is sorted in descending order.

6. Menu status

Truck overview

The truck overview is the home page of **connect:**portal.

The truck overview shows in table form:

- All trucks
- Error count for last 30 days
- Counter reading for operating hours

Opening detailed view

1. Status\Truck overview
2. Click on the *magnifying glass symbol* next to an entry.

» Detailed view will open next to the truck overview.

Detailed view

The detailed view adds two tabs to the truck overview:

- Machine data
  Operating hours
- Errors
  Error codes stating components and time stamp

7. Menu reports

Report types

- The Error Report shows all error codes in table form.
- The Error Summary Report shows the frequency of error codes in table form. Vehicles with a high error frequency can be easily identified.
- The Operating Hour Report shows the operating hours of the trucks in table form.

Creating a scheduled report

1. Reports\Scheduled reports
2. Click on *New report*.
3. Select report type.
4. Enter name of report.
5. Select truck groups or trucks.

The time period for a report begins on the day in the **From** box and ends one day before the date in the **To** box.

6. Select report period.
7. Select execution cycle and first execution.
8. Enter at least one email address.
9. Click on *Save*.

Sending scheduled reports as an email

1. Create a scheduled report.

If the report is to be sent in a different language, change language before sending.

2. Click on the *run symbol*.

» The report will be sent as an email with attachment in PDF format.

Creating a report

1. Reports\Report type

The time period for a report begins on the day in the **From** box and ends one day before the date in the **To** box.

2. Select time period.
3. Select truck groups or trucks.
4. Click on *Generate report*.

Exporting a report

1. Create a report.
2. To export in CSV format: click on the *CSV file format symbol*.
   To export in PDF format: click on the *PDF file format symbol*.
3. Select location to save the report.
4. Click on *Save*.

8. Menu administration

Entities

Entity is the umbrella term for user, user group, truck and truck group.

Creating an entity

1. Administration\Entities\Designating entities\Create
» This will open a dialog.
2. Fill in the dialog fields.
3. Click on *Save*.

Managing an entity

1. Administration\Entities\Designating entities\Manage
2. Find the entity.
3. Click on *Details*.
» This will open the detailed view.
4. Edit the entity.
5. Click on *Update*.

Deleting an entity

1. Administration\Entities\Designating entities\Manage
2. Find the entity.
3. Click on *Details*.
» This will open the detailed view.
4. Click on *Delete*.
5. Confirm the query with *Yes*.

Access rights

Roles link users or user groups to trucks or truck groups.

Creating a role

1. Administration\Access rights\Roles\Create

» This will open a dialog.

2. Enter a name.
3. Select users and user groups.
4. Select trucks and truck groups.
5. Click on *Save*.

Managing a role

1. Administration\Access rights\Roles\Manage
2. Find the role.
3. Click on *Details*.

» This will open the detailed view.

4. Edit the role.
5. Click on *Update*.

Deleting a role

1. Administration\Access rights\Roles\Manage
2. Find the role.
3. Click on *Details*.

» This will open the detailed view.

4. Click on *Delete*.
5. Confirm the query with *Yes*.