

# Evolve 0513 Commissioning Guide

Sign up / sign in @:

<https://app.switchdin.com/accounts/sign-in?profile=eguana>

## Introduction

This guide is intended for system installers with an assigned administrator to on-board and configure the Evolve ESS. First time users can create an account using the sign up link above. The principle tasks include:

1. Create a new portfolio for your installation company.
2. Add units (systems) to your portfolio for each new installation.
3. Configure the Evolve system by adding the Evolve PCS and metering devices.

These tasks are recorded step-by-step below.

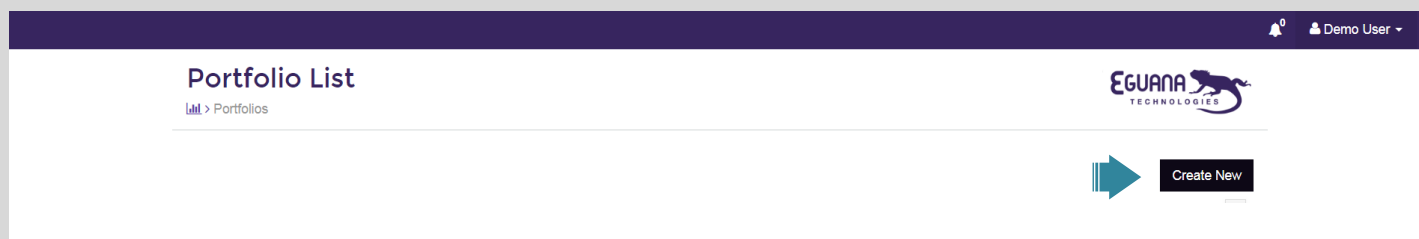
It is recommend that you add your regional Eguana service/training manager as a Portfolio and Unit Service Customer in order to allow remote read access to your systems in the event technical support is required. Access can be issued and revoked at your discretion.

Following commissioning of the system, invite the system owner as a Unit Service Customer. This will provide them with access (read only) to their system via the online portal using the sign in link above.

Refer to the end of this document for a description of the security levels of each role.

NOTE: The system must be powered and connected to the internet to claim an endpoint (SwitchDIN Droplet EMS).

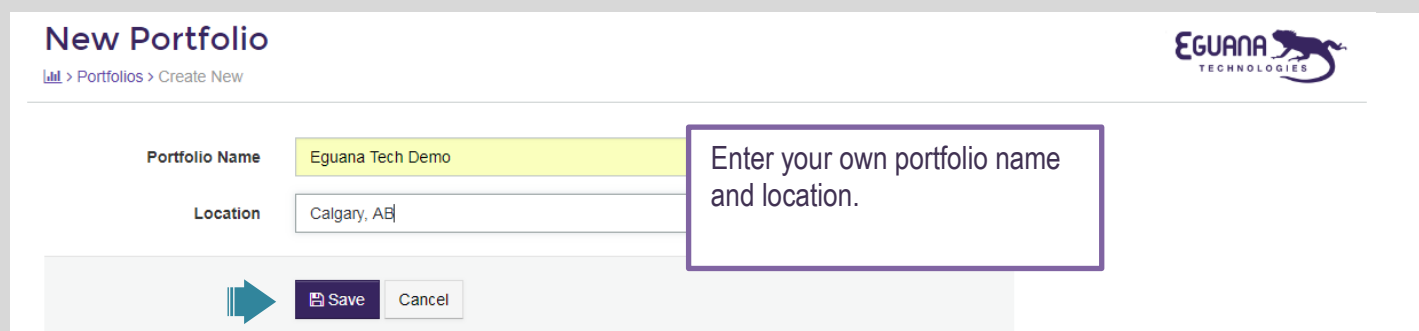
## Step-by-Step Guide



Portfolio List

EGUANA TECHNOLOGIES

Create New



New Portfolio

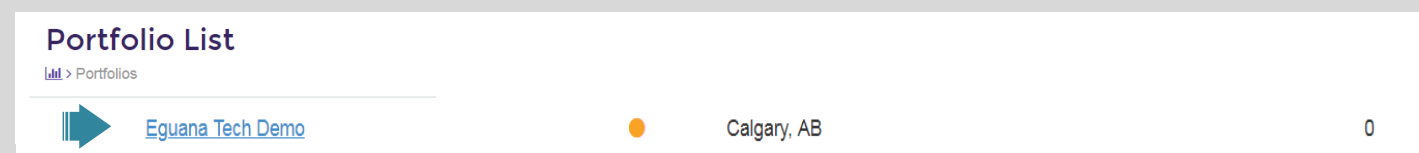
EGUANA TECHNOLOGIES

Portfolio Name: Eguana Tech Demo

Location: Calgary, AB

Enter your own portfolio name and location.

Save Cancel



Portfolio List

EGUANA TECHNOLOGIES

Eguana Tech Demo

Calgary, AB

0

# Eguana Tech Demo

Portfolios > Eguana Tech Demo



Status Map Analytics Settings Users

- PV
- Load
- Battery
- Grid
- Refresh

➡ Add Unit

## New Unit

Portfolios > Eguana Tech Demo > Add Unit

Unit Name: Eguana Demo Unit

Address: Calgary, AB, Canada

Tags:

➡ Save Cancel

## Eguana Tech Demo

Portfolios > Eguana Tech Demo

Status Map Analytics Settings Users

Eguana Demo Unit			
Peak	Now	Total	Status
0.00	0.00	0	⚠

### Eguana Demo Unit

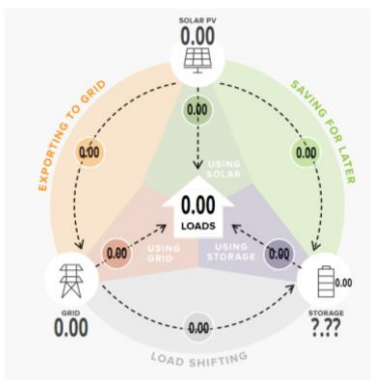
🟢 Peak	⚡ Now	📈 Total	ℹ️ Status
0.00	0.00	0	⚠

## Eguana Demo Unit

Portfolios > Eguana Tech Demo > Eguana Demo Unit



Overview Performance Live **Devices** Events Settings Users Alerts



### Calgary Weather

☁️ 11.88°C

Smoke  
Solar 08:22 to 22:57  
Wind 1m/s  
Humidity 54%

### System Status

Updated ...

## Eguana Demo Unit

Portfolios > Eguana Tech Demo > Eguana Demo Unit



Overview Performance Live **Devices** Events Settings Users Alerts

➡ + Claim an Endpoint

**+ Claim an Endpoint**

Endpoint Id:

00000000-0000-0000-0000

Enter the ID of the endpoint

Cancel

Claim

Enter the endpoint UUID\* as shown on the Droplet enclosure inside the Evolve PCS. Include the leading 0's as shown.

\*UUID format is 8-4-4-12. The last 12 digits are indicated on the Droplet enclosure.

Add following devices (repeat for each device as shown above):

- Eguana PCS Qty=1
- Eguana PCS aggregates Qty=1
- AcuRev 131X Power Meter Qty =1 if PV inverter is in the device drop down list and is integrated to the SwitchDIN Droplet.  
Qty=2 if PV measurement requires a dedicated meter for PV inverter integration.

# About SwitchDin Roles

SwitchDin has roles that provide or inhibit access to certain elements of system functionality.

## SwitchDin Controlled Roles

Role Name	Description	System Object Control
Controller	Provides access to "Control" elements, such as device and DRM controls. Can be associated with a unit or a portfolio. SwitchDin centrally manages all "Controllers", this role cannot be issued by a system user.	DEVICES (R/W)

## Portfolio Level Roles

Role Name	Description	System Object Control
Portfolio Manager	Overarching management role for the portfolio that can (1) create new units (2) invite new users and (3) manage unit level configuration. (4) setup ssh (5) view messages (6) view raw data (7) change portfolio settings.	ACCOUNTS(R/W), ALERTS(R/W), DEVICES(R/W), PORTFOLIOS(R/W), TARIFFS(R/W), UNITS(R/W)
Project Owner	As per Portfolio Manager.	
Portfolio Service Customer	Read only access to all units in the portfolio.	PORTFOLIOS(R), TARIFFS(R), UNITS(R)

## Unit Level Roles

Role Name	Description	System Object Control
Unit Owner	Overarching management role for the unit that can (1) create new devices (2) invite new users and (3) manage unit level configuration. Can perform all CRUD operations on the unit.	ALERTS(R/W), DEVICES(R/W), PORTFOLIOS(R/W), TARIFFS(R/W), UNITS(R/W)
Unit Service Customer	Read only access to the unit data. <b>This access level is recommended for the purchaser (home owner) of the system.</b>	UNITS(R)

(R/W) = Read & Write      (R) = Read