

Application Note – Alerts in the Monitoring Platform

Revision History

Version 1.4, August 2023 – updated content and images
 Version 1.3, July 2021 – added information for email notifications
 Version 1.2, December 2020 – added information for notification settings
 Version 1.1, August 2020 – added alerts categories
 Version 1.0, June 2020 – first version

Table of Contents

Alert System Overview	1
Configuration Engine	1
PV Fleet Management	2
Alert Profiles	2
Create and Configure Profiles.....	2
Alert Categories, Pre-defined Rules, and Information and Configuration.....	3
Categories	3
Information and Configuration.....	3
Set a Default Profile	3
Additional Profile Operations	3
Define Email Notifications.....	3
Alert Notifications.....	4
Assign Profiles to Sites.....	4
Customize Notifications Email Footer	5
Viewing Alerts.....	6
Account Level Alerts	6
Mini Dashboards	6
Handling Alerts	6
View Site Level Alerts	7
Alerts Tabs.....	7

Alert System Overview

In the monitoring platform, the alerts system enables installers to resolve issues across their PV fleet. It diagnoses and troubleshoots issues and supports bulk actions on multiple sites instead of performing them one by one on individual sites. The alerts system consists of:

Configuration Engine

- **Create profiles:** Alert profiles contain sets of pre-configured rules that are enabled by the user, and can be applied to multiple sites at once

- **Define notifications:** Determine which stakeholders are notified for each rule in the profile – including account users, system owners and external users
- **Assign sites to profile:** A profile can be assigned to multiple sites with similar characteristics, for example, service agreements, type of site, for example residential or commercial, or geographical region

PV Fleet Management

- **Spot issues:** Receive daily notifications of new alerts by email, and view alerts for sites in your account via the monitoring platform
- **Prioritize by impact:** For each alert raised, an impact indicator is automatically calculated. The indicator helps prioritize alerts for handling and receives color-coded values to easily identify critical issues. Alerts with a higher impact value potentially cause greater energy loss than alerts with a lower impact value. See [Mini Dashboards](#) for more information on alert impacts.
- **Resolve issues:** Follow detailed steps for easy on-site or remote troubleshooting

Alert Profiles

An alert profile consists of a set of rules that can be applied to sites with similar characteristics, for example residential, commercial, VIP sites or sites in a specific region. Users can select rules from a pre-defined list to enable them for a profile.

Once a profile is configured, it can be assigned to any of the sites in the account, eliminating the need to define a set of alerts for each site.

Create and Configure Profiles

To Create a Profile:

1. Go to your username > **My Account**.
2. On the top ribbon of the Account dialog box, click **Alerts**.



NOTE

Existing profiles are listed under Alert Profiles. A pre-configured SolarEdge profile is applied to existing sites in your Account and cannot be removed.

3. In the Alert Profile window, click **Add Profile**.
4. Enter a **Profile Name** and then click Enter.
The new profile is added.

Alerts in the Monitoring Platform

Alert Categories, Pre-defined Rules, Information and Configuration

Click any of the following **categories** to view the **rules** available in the category:

Categories

- Equipment
- Grid
- Storage
- Communication
- Environmental
- Energy Management

Click any of the **rules** to view the following **information** and **configuration**:

Information and Configuration

- **Description:** A description of the alert's rule
- **Troubleshooting:** Troubleshooting guidelines
- **Notifications:** Select which users are notified for each rule in the profile. For details, see the [Define Email Notifications](#) section.

Set a Default Profile

You can set one of the profiles as the default, which is assigned to all sites.

To Set a Default Profile:

Hover over a profile. Click the  icon to make that the default profile. The default profile is now created.

Additional Profile Operations

Hover over the following operations to view or modify your required profile:

- Default 
- Rename 
- Duplicate 
- Delete 

Define Email Notifications

Email notifications automatically notify users of triggered alerts. For each rule in the profile, select which users receive a notification email. To set an email notification status, select an alert profile and rule from the notification dropdown list.

The Alert profiles are described in the following table:

Alert Profile	Rule
Account users	This list displays all the users in your account.
System owners	System owners receive notifications of alerts. This box is checked by default for System owners.
Immediately notify users	Notify account users of the alert. This box is checked by default for owners of existing accounts.
Notify additional recipients	Assign this setting to additional recipients.
Assign this setting to additional rules	Assign this setting to additional rules in the profile.

To Set Email Notifications:

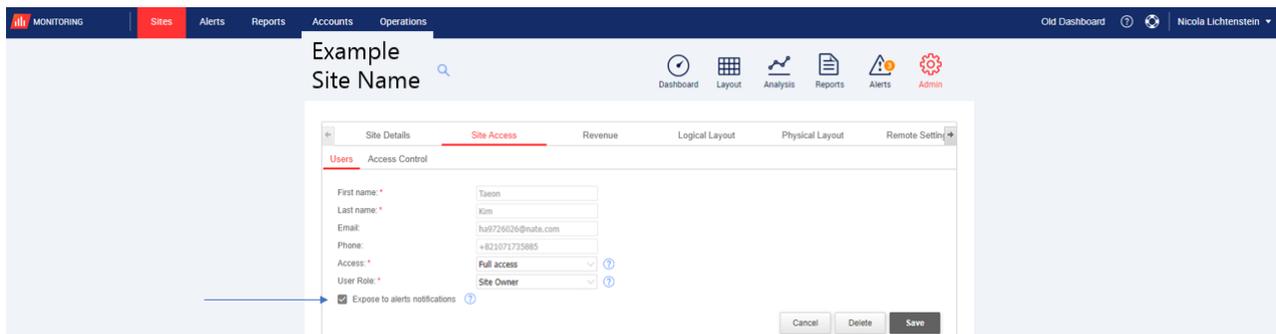
1. Go to **Notifications**, click on the dropdown arrow.
2. In the field **Click to select account users**, click. A list of account users opens.
3. Select **All/None**, then click **OK**.
4. Select the checkbox next to **System Owners**.
5. Select the checkbox next to **Immediately Notify Users**.
6. Click **Notify additional recipients**. A new window opens.
7. Enter the email addresses of the new recipients. Click **Save**.

Alert Notifications

To receive an alert notification by email, the system owner must have permission to receive alert notifications.

To Set Alert Notifications:

1. On the dashboard, click **Sites**.
The **Sites** window opens.
2. Click the site you want to access.
3. Click **Admin > Site Access > your First name**.
The **Users** window opens.



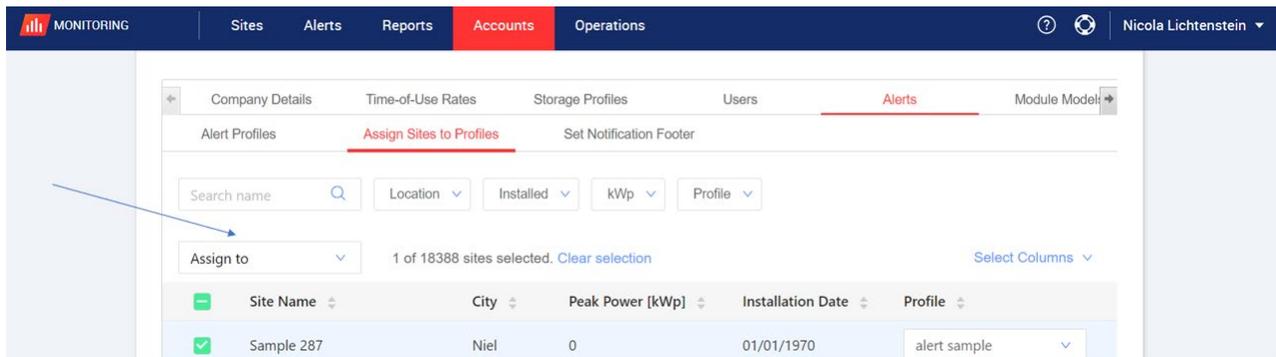
4. Click **Expose to alerts notifications**.

Assign Profiles to Sites

To determine which alerts are triggered for each of your sites, assign an **Alerts Profile** to one or multiple sites.

To Assign an Alert Profile to a Site:

1. Select your username at the top of the page and click **My Account**.
2. Click **Alerts > Assign Sites to Profiles**.
The **Assign Sites to Profiles** window opens.



Alerts in the Monitoring Platform

3. Select the box next to the **Site Name**.
4. To choose which site to assign the profile to, click the **Assign to** dropdown list. A list of site names is displayed.
5. Click the site name. A message is displayed at the top of the page telling you the **Profile was assigned successfully to selected sites**.

**NOTE**

You can assign multiple profiles by checking the site name box, or all the relevant boxes

6. Use filtering options to view alerts. Filter with the following options:
 - Search name
 - Location
 - Installed
 - Peak Power
 - Profile
 - In the **Select Columns** dropdown list, select which columns to view
7. Click **Clear selection** to clear all the site's profile information.

Customize Notifications Email Footer

The footer of the daily alert's notification email can be modified to include a generic message. The message, which is displayed at the bottom of each email, is customizable, and can include alert handling guidelines, hyperlinks, contact information, a company logo, and so on.

**NOTE**

The Set Notification footer is sent to all account profiles.

To Customize the Alerts Notifications Email Footer:

1. Select your username at the top of the page and click **My Account**.
2. Click **Alerts > Set Notification Footer**.
The **Set Notification Footer** window opens.

Accounts Operations

Company Details Time-of-Use Rates Storage Profiles Users Alerts Module Model

Alert Profiles Assign Sites to Profiles Set Notification Footer

Add a footer to all notification emails.

B I U [List] [Link] [Image] [Undo] [Redo]

Cancel Save

NOTE
 Access to the actions described in the **Alert Profiles** chapter is enabled only to users in the account with the roles of account manager or account admin.

Viewing Alerts

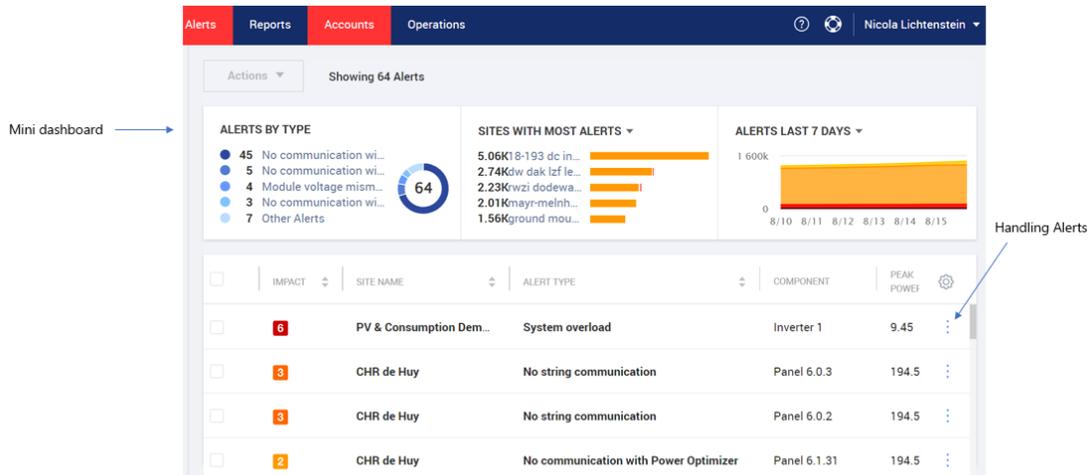
Alerts can be viewed on two levels:

- **Account level:** Includes all alerts raised in all sites of the account
- **Site level:** Includes all alerts raised in a specific site

Account Level Alerts

To View the Account-level Alerts Page:

Click the **Alerts** tab.
 The **Alerts** window opens.



Mini Dashboards

In the **Alerts** window a mini dashboard displays your site's alert status. The mini dashboard provides the following alert details:

NOTE
 To view the alert status, hover over the required alert.

Mini Dashboard	Description
Alerts by Type	Displays the type of alerts on-site and the total number of alerts across all sites.
Sites with Most Alerts and Alerts by Impact	Displays a chart of the alerts.
Alerts Last 7 Days, Last 30 days, This Year	Displays alerts over the requested time frame.

Handling Alerts

Click the menu to access the alert handling options. The following options are displayed:

Handling Alerts	Description
More Information	A popup window opens with additional information about the alert, a description of the rule, and troubleshooting guidelines.

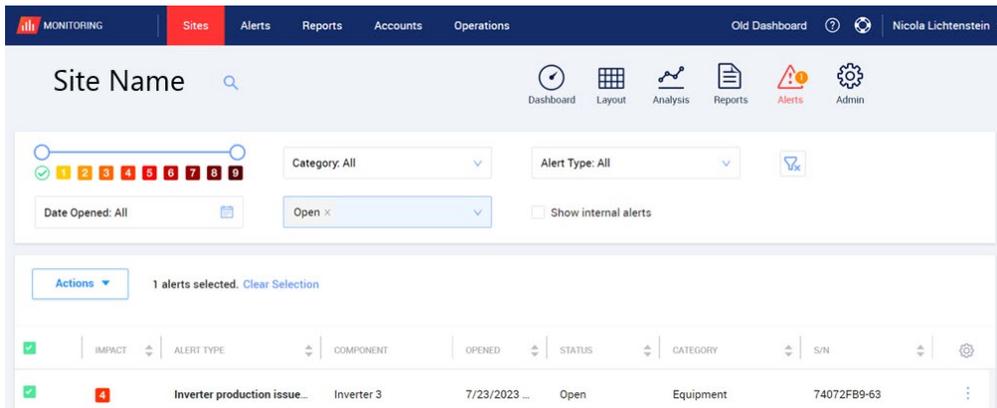
Alerts in the Monitoring Platform

Handling Alerts	Description
	<ul style="list-style-type: none"> ■ Follow the suggested guidelines to resolve the issue ■ If the issue is resolved, the alert closes automatically
View in Layout	Redirects to the Layout tab and highlights the component the alert was triggered for.
View in Charts	Redirects to the Charts tab where users can further investigate the alert and save the chart or export the chart as a CSV.
Mute Alert	If you wish to temporarily mute an alert, select a date on which to resume displaying the alert, and click Save .
Close Alert	A popup window opens asking if you want to manually close alerts.
Technical Support Chat	<p>A SolarEdge Support chat window opens.</p> <ul style="list-style-type: none"> ■ The Alert Type is displayed, and you are asked to provide further information

Site Level Alerts

To View the Site-level Alerts Page:

- In the **Sites** tab, select a **Site**.
- Click on the **Alerts** tab to display the alerts.
The **Site Level Alerts** window opens.



To Modify the Alerts:

- Select the alert.
- Click **Actions** to view the following dropdown list:
 - Mute
 - Unmute
 - Edit
 - Close Alert

Alerts Tabs

The Alerts list provides details on all alerts that are raised in your account sites. The following information is available:

Alerts in the Monitoring Platform

Field	Description
Impact	The severity level of the alert type. The impact is rated by: <ul style="list-style-type: none">■ Number: 1 has the least impact, 9 has the most impact■ Color: Yellow alerts have the least impact; Dark brown alerts have the most impact
Alert Type	A description of the alert
Component	The component in the site that triggered the alert.
Opened	The date and time of the raising of the alert.
Status	The current alert status. One of the following states is assigned to the alert: <ul style="list-style-type: none">■ Open■ Open muted■ Closed■ Closed muted
Category	For details, see Alert Categories, Pre-Defined Rules, Information and Configuration
S/N	Displays the serial number of the device.