

Site Admin in SolarEdge ONE for C&I – User Guide

Revision History

Version 1.0, August 2024: Initial Version

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SolarEdge ONE for C&I overview

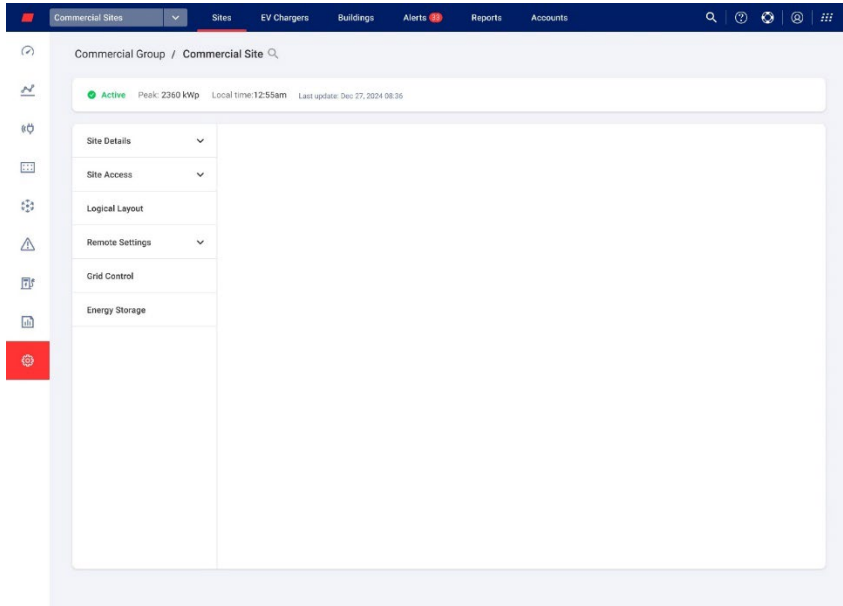
SolarEdge ONE for C&I is an orchestrated platform for monitoring and managing PV fleets, storage, EV-charging stations, and load optimization. You can optimize all your energy assets using live data analytics to achieve cost savings.

Site Admin overview


In Site Admin, you can view and edit the administration of your site.

To open the Site Admin dashboard:

1. Log in to the [Monitoring platform](#).
2. To access your site, click the **SITE NAME**.
The **ONE for C&I** dashboard is displayed.
3. On the **Main Menu**, click .
The **Admin** menu is displayed.


















To change your portfolio or site name:

From the **Search**  dropdown lists, select from the options available, or type in the names of the portfolio and site you are searching for.

Admin settings

Admin in ONE for C&I includes the following settings:




Admin View Settings	Action
Site Details	<p>Site Details enables you to edit site parameters, and includes the following sub-settings:</p> <ul style="list-style-type: none">  Details  Address  Contact info
Site Access	<p>Site Access enables you to edit who has access to the site, and includes the following sub-settings:</p> <ul style="list-style-type: none">  Users: Manage and add site owners and site users.  Access Control: Provides access for site users in the following ways: <ul style="list-style-type: none"> • Public Access

Admin View Settings	Action
	<ul style="list-style-type: none"> • Kiosk View • API Access • Access to Performance Ratio Charts by Site Users <p> Associated Accounts: PV sites registered and managed on the SolarEdge Monitoring platform can be accessed and monitored by third parties.</p>
<p>Logical Layout</p>	<p>Logical Layout enables you to add, replace, and update your system’s components.</p> <p> Add </p> <p> Replace </p> <p> Update </p>
<p>Remote Settings</p>	<p>Remote Settings enables you to perform remote updates for inverters on your PV site, and includes the following sub-settings:</p> <ul style="list-style-type: none">  Grid settings  Firmware Update <p> NOTE Firmware Update is only displayed in the Admin menu if you have inverters on site that support firmware updates.</p>
<p>Grid Control</p>	<p>This feature is only enabled if you have a local controller on your PV site. It facilitates cloud communication with the local controller, to enable communication and control between the grid and the site.</p>
<p>Energy Storage</p>	<p>Energy Storage is only enabled if you have grid control. In this feature you setup your commercial battery and Commercial Storage System (CSS).</p>

Site Details

Site Details lists all the site parameters that can be entered when registering a site. You can edit or add details at any time. If the site does not have a valid location or is not marked on the map, fill in a location on the map before making any further edits. For more information on how to edit or add details to your site refer to [Creating a new Site on the Monitoring Portal Application Note](#).

To edit Site Details:

1. From the **Admin** menu, click **Site Details**, then select from the following options:
 -  Details
 -  Address
 -  Contact Info

2. Enter the information in the fields provided, click **Save**.
Your updated information is saved.

Site Access

In Site Access you can do the following:

- Edit who has access to the site.
- Edit the permissions the site user has in the Monitoring platform.
- Edit the views the user has access to.
- Edit the accounts that are associated with each site.

Users

Users in the Monitoring platform enables you to do the following:

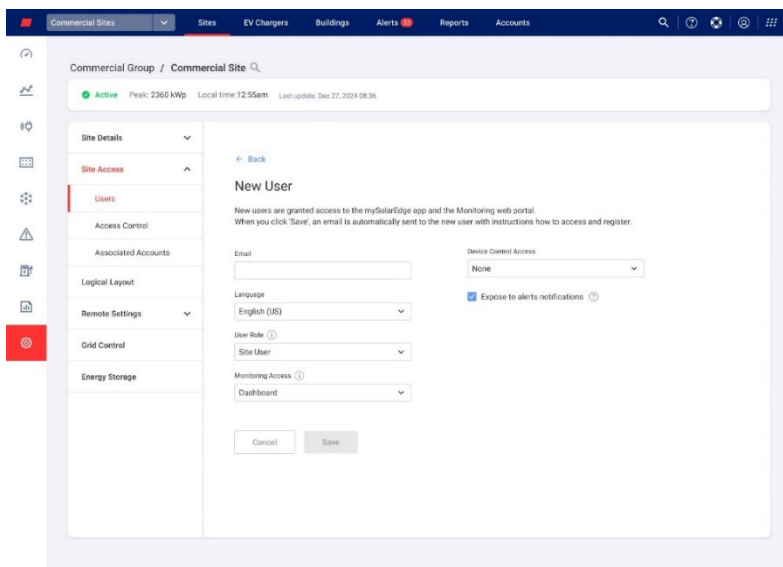
- Add, edit, and delete site users and site owners.
- Edit the permission level the site user has in the Monitoring platform.

The following are permission levels:

- **Dashboard:** allows the system owner to access the dashboard.
- **Dashboard and Layout:** allows the system owner to access the dashboard and layout.
- **Full Access:** allows the system owner to access the dashboard, layout, charts, reports, and alerts tabs.

To add a new user:

1. From the **Admin** menu, select **Site Access>Users**.
Users is displayed.
2. Click **+Add New User**.
New User is displayed.



3. In the following fields, add the new user's information:

**NOTE**

If you have a smart home device the **Device Control Access** field is also displayed.

- Email
 - Language
 - User Role
 - Monitoring Access
 - Device Control Access
4. To enable the new user to view alert notifications, select the **Expose to alerts notifications** checkbox.
5. Click **Save**.
Your new user information is saved on the Monitoring platform.

To edit a site user's details:

1. On the **Users** list, click the name of the site user whose details you want to edit.
User Details is displayed.

2. In the **User Role** field, edit the user's role.
3. In the **Monitoring Access** field, edit the user's site access.
4. Click **Save**.
Your edited details are saved.
5. To go back to **Users**, click **Back**.
You are back in **Users**.

To delete a User:

1. Under **Users**, choose which user to delete and click .

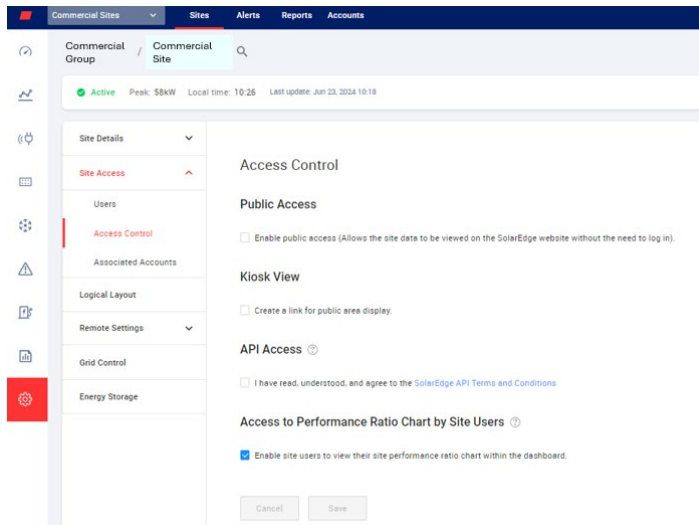
2. You receive a message asking you to confirm you want to delete the user, click **Yes**.
The user is immediately deleted from the list of users.

Access Control

Access Control allows you to control the level of access to your site.

To edit Access Control:

1. From the **Admin** menu, select **Site Access**>**Access Control**.
Access Control is displayed.



Public Access

Provides public access for site users.

To allow public access to the site:

1. In **Public Access**, select the **Enable public access** checkbox.
The site's dashboard and layout can be viewed on the link provided by SolarEdge, in the **Public Address** field, without the user needing to log in to SolarEdge.
2. In the **Public Name** and **Monitoring Access** fields, add the public name and from the **Monitoring Access** dropdown list select the permission you require.
3. To activate the URL address, click **Save**.
Your URL address is activated.
4. A URL address is displayed in the **Public Address** field, click **Copy**.
You can share the URL address with other users.

Kiosk View

Kiosk View enables you to set up a live view of the SolarEdge Monitoring platform for display in a public space, for example, the lobby of a public building.

To set up a Kiosk View:

1. In **Kiosk View**, select the **Create a link for public area display** checkbox.
2. **Optional.** In the **Site Display Name** field, edit the **Site Display Name**.
This name replaces the site name on the public screen display.
3. Click **Save**.
Your URL address is activated and displayed in the **Kiosk Address** field.
4. Click **Copy**.
You can paste the URL address into a browser, to display on a public screen.



NOTE

For further information on how to set up a live view of the SolarEdge Monitoring platform for display in a public space, refer to the [Set Up a Public Display of the SolarEdge Monitoring Site Dashboard in the Monitoring Platform Application Note](#).

API Access

SolarEdge's API allows other software applications to access the monitoring system database for the following purposes:

- Data analyses
- Fleet management
- Displaying system data in other applications



NOTE

SolarEdge keeps data in a secure VIPI server.

To enable API Access:

1. To copy your Solaredge API key, read the **SolarEdge API Terms and Conditions** and select the checkbox to confirm.
The **Copy** field is displayed.
2. Click **Copy**.
Your API key is copied.



NOTE

Refer to the [SolarEdge Monitoring Server API](#) document for further information.

Access to Performance Ratio Chart by Site Users

Enables site users to access the Performance Ratio chart.

To enable users to access the Performance Ratio chart:

1. In **Access to Performance Ratio Chart by Site Users**, select the **Enable site users to view their site performance ratio chart within the dashboard** checkbox.
2. Click **Save**.
You can view the Performance Ratio Chart for the site on your site dashboard.

**NOTE**

Refer to the [Performance Ratio Calculation and Activation in the Monitoring Platform Application Note](#) for further information.

Associated Accounts

PV sites registered and managed on the SolarEdge Monitoring platform can be accessed and monitored by third parties, by utilizing the Associated Accounts feature. Site owners can grant access to a third party at any time and control access rights for any site.

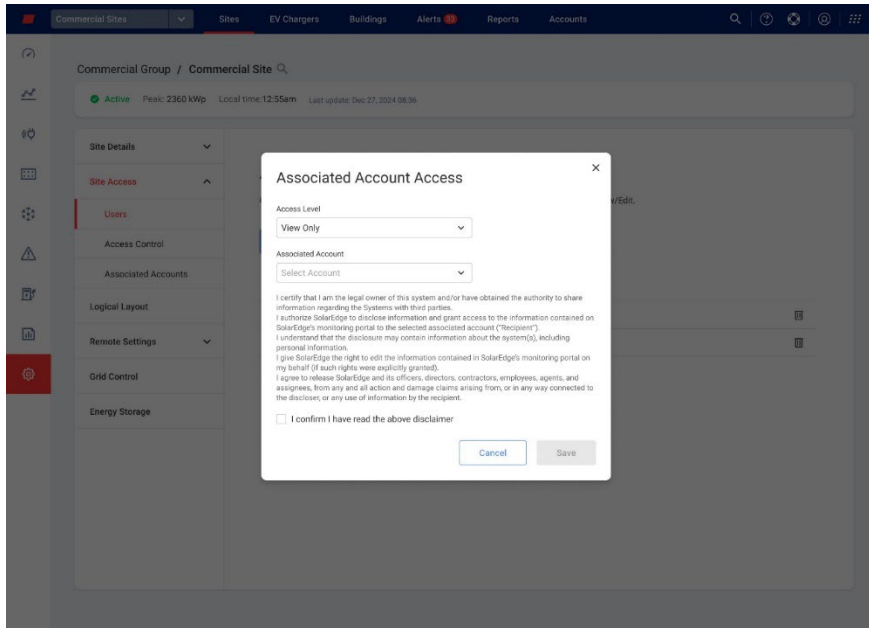
To enable **Associated Accounts Access**:

1. From the **Admin** menu, click **Site Access > Associated Accounts**.
Associated Accounts Access is displayed.

The screenshot shows the SolarEdge Monitoring Platform interface. The top navigation bar includes 'Commercial Sites', 'Sites', 'EV Chargers', 'Buildings', 'Alerts', 'Reports', and 'Accounts'. The main content area is titled 'Associated Accounts Access' and includes a 'Grant Access' button. Below the button is a table with the following data:

Company Name	Approved on	Access Level
Total Solar	12/14/2022 07:09 PM	View / Edit
Solar Banny	12/14/2023 05:07 PM	View / Edit

2. Click **Grant Access**.
The **Associated Account Access** pop-up is displayed.



3. From the **Access Level** dropdown list, select **View Only** or **View/Edit**.
4. From the **Associated Account** dropdown list, select which accounts to grant access to.
5. Read the legal information and select the confirmation checkbox.
6. Click **Save**.
An email is sent to the other party's account administrator.



NOTE

Refer to the [Monitoring Associated Accounts Application Note](#) for further information.

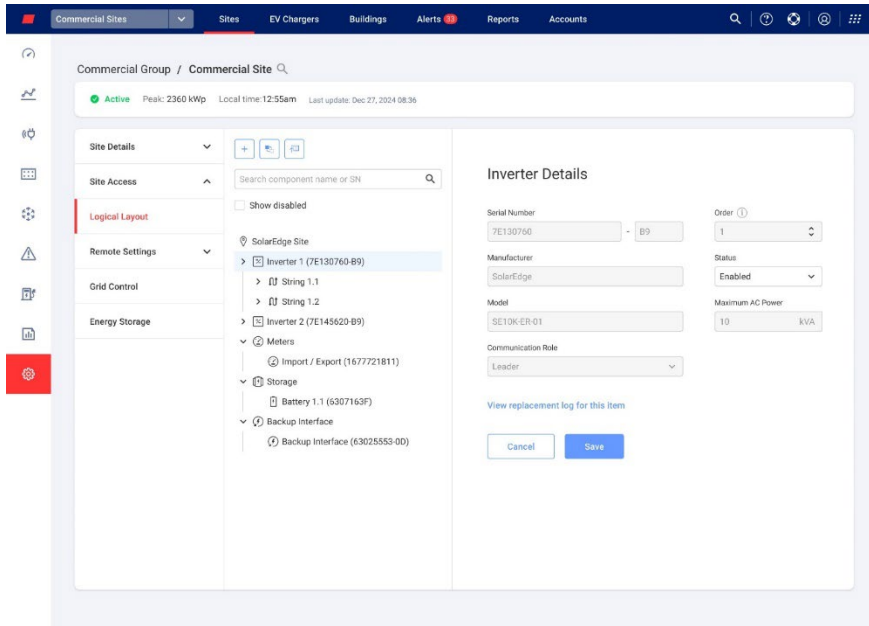
Logical Layout

Logical Layout displays a comprehensive list of the site's components. It enables you to do the following:

- Add a new inverter, gateway, or EV charger.
- Replace components, such as inverters, power optimizers, gateways, and SMIs.
- Update the module's details.


To view Logical Layout:

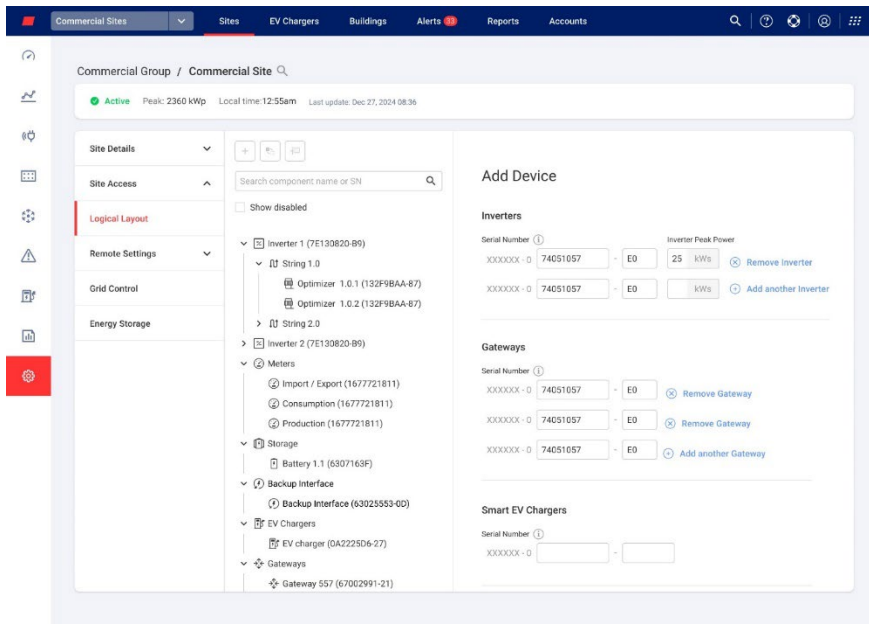
1. From the **Admin** menu, select **Logical Layout**.
The component list is displayed.
2. To view a component's details, select the component.
The component's details are displayed.



3. **Optional.** In **Inverter Details**, from the **Order** dropdown list, change the order number.
4. **Optional.** From the **Status** dropdown list, change the status.
5. Click **Save**.
The component's details are saved.

To add a component in Logical Layout:

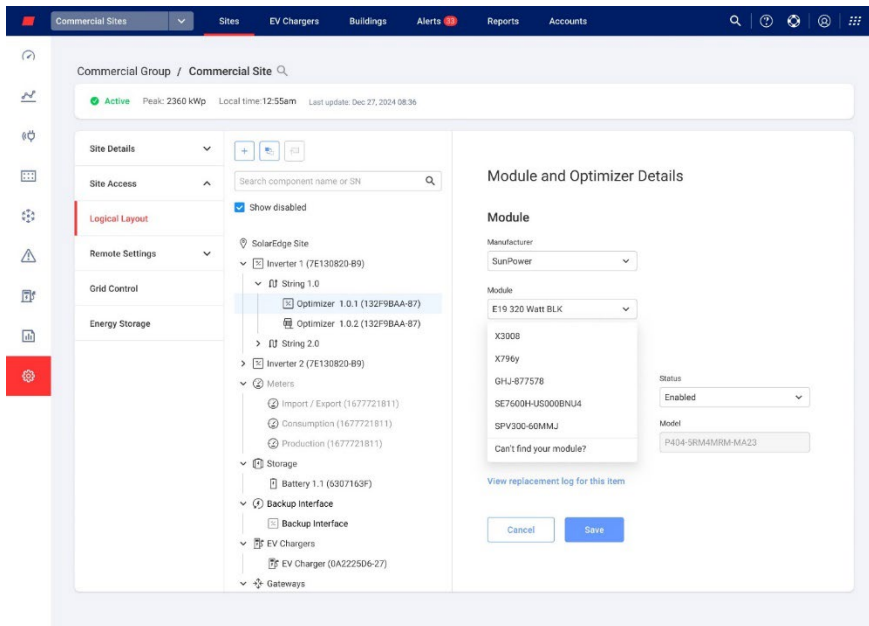
6. Click .
Add Device is displayed.



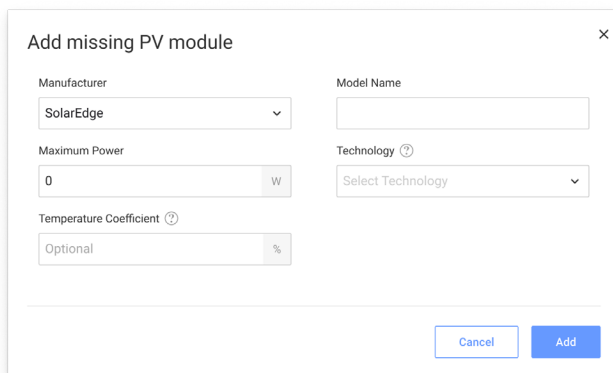
7. To add Inverters, Gateways, or Smart EV Chargers, click **Add another <component>**.
New fields are displayed.
8. In the **fields** displayed, add the new component's details.
9. Click **Create**.
The new component appears on the component list.

If you can't find your module or optimizer on the components list:

1. Click any optimizer or module on the components list.
Module and Optimizer Details are displayed.



1. From the **Module** dropdown list, select **Can't find your module?**
The **Add missing PV module** pop-up is displayed.




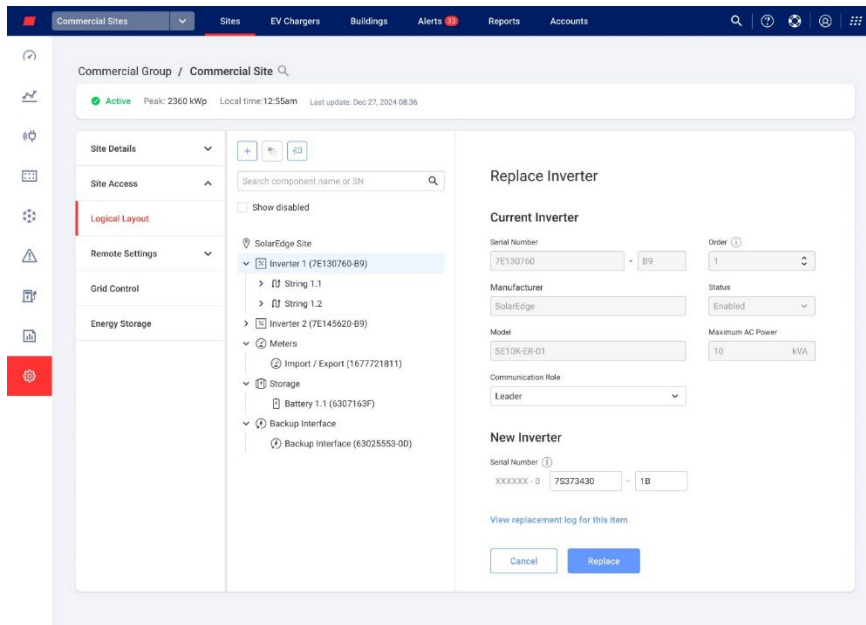
2. In the fields provided, add your module's missing details.
3. Click **Add**.

Module and Optimizer Details are displayed.

- Click **Save**.
Your module's details are saved on the components list.

To replace a component in Logical Layout:

- In the component list, select the component to replace.
- Click .
Replace <component> displays your component's details. They are divided into **Current <component>** and **New <component>**.



- In **New <component>**, enter the **Serial Number** of the new component.




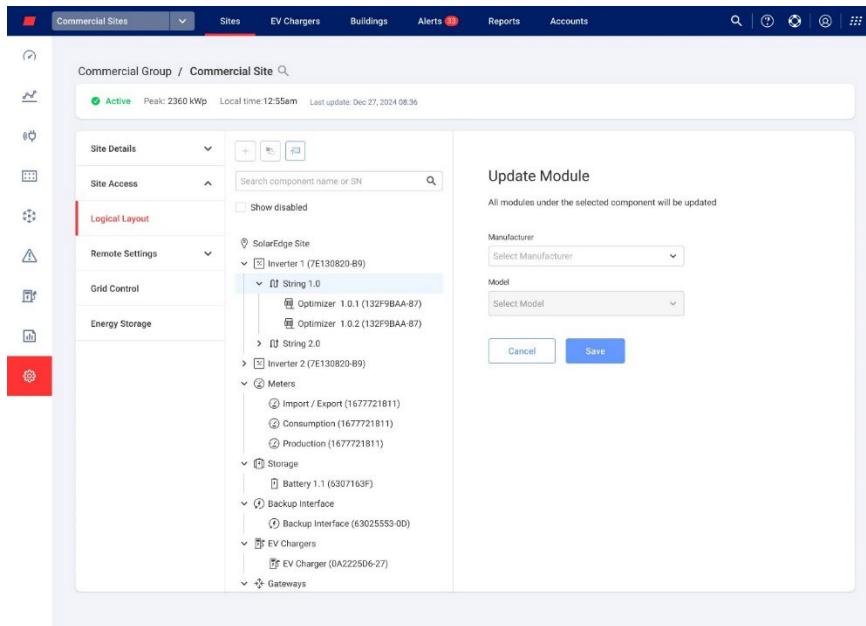
NOTE

The serial number of your inverter is printed on the device's label.

- Click **Replace**.
The new component appears on the component list. The replaced component is disabled.
- Click **View replacement log for this item** to see if the component was previously replaced, when it was replaced, and how many times it has been replaced.

To update a component in Logical Layout:

- In the component list, select the component you want to update.
- Click .
Update Module is displayed.



3. In the **Manufacturer** field, select the manufacturer.
4. In the **Model** field, select the model.
5. Click **Save**.

Your components details have been updated.

NOTE

To update or replace all strings under an inverter, click on the inverter and all strings under that inverter are updated. To update all modules under a string, click on the string and all modules under that string are updated.

NOTE

If there is a **physical layout** for this site: The updated component in the logical layout automatically appears in the location of the replaced component.

Remote Settings

The SolarEdge Monitoring platform enables you to remotely set grid settings for your system and perform remote firmware updates for inverters on your PV site. This capability saves significant time as site visits are not required for simple firmware updates. Updating the firmware adds value to the PV site as it includes newly released capabilities and features and helps to solve existing issues.

To learn what's included in the latest inverter firmware version, read the [SolarEdge Firmware Release Notes](#).

NOTE

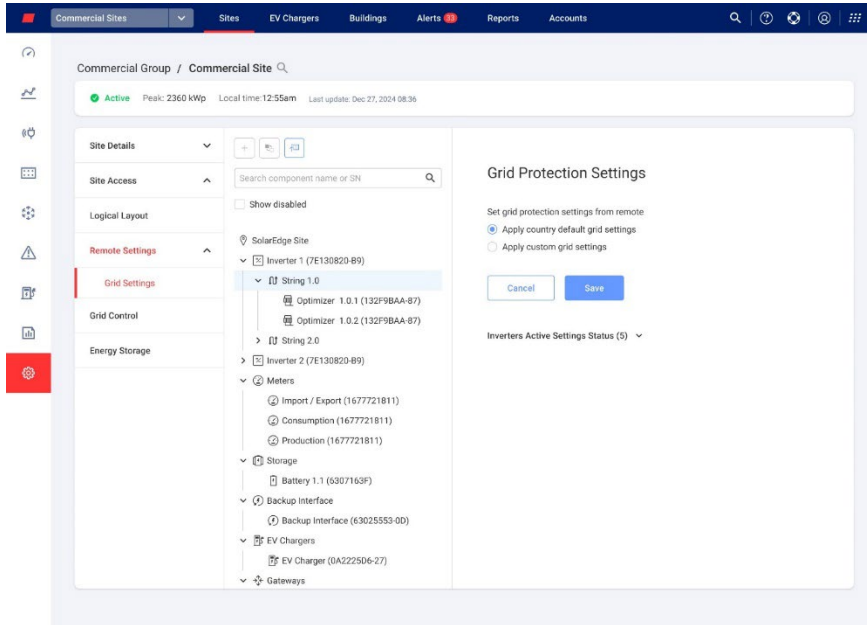
Access to Remote Settings is only available for account admin users.

Grid Settings

In Grid Settings, you can set grid parameters remotely for inverters on your PV site.

To change grid protection settings remotely:

1. From the **Admin** menu, select **Remote Settings**>**Grid Settings**. **Grid Protection Settings** is displayed.



2. Select **Apply country default grid settings** or **Apply custom grid settings**.
3. If you select **Apply country default grid settings**, click **Save**.
The default grid settings are automatically saved.
4. If you select **Apply custom grid settings**, fill in the relevant parameters in the tables displayed.
5. Click **Save**.
Your inverter’s custom grid settings are saved.

NOTE
Refer to the [Viewing and Setting Inverter Grid Protection Values Application Note](#) for further information on grid settings.

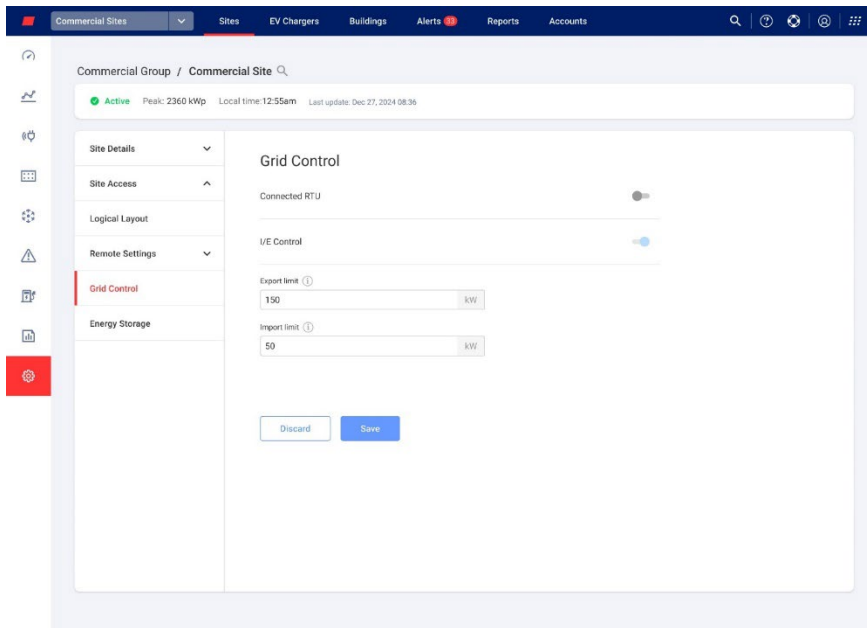
Firmware Update

Firmware Update is only available on the **Admin** menu if inverters on your PV site support firmware updates.

NOTE
Refer to the [Remote Inverter Firmware Update in the Monitoring Platform Application Note](#) for further information.

Grid Control

NOTE
Grid Control is only displayed in Site Admin if a local controller is installed on the PV site, and import and export meters are connected to the local controller.



Grid Control facilitates cloud communication between the grid and the PV site in the following ways:

- If a Local controller is installed on-site, it controls the grid parameters, and the site import and export limits.
- If a Remote Terminal Unit (RTU) is located on-site - between the meters and the local controller - it enables the utility company to connect the site to the grid and allows them to change the import and export values and grid parameters.

NOTE

If you don't want to control the import/export limits toggle **OFF** the I/E Control. By default, it is toggled **ON**.

NOTE

RTUs may be a regulatory requirement in some regions. The RTU on-site overrides the parameters set by the local controllers.

To change parameters in I/E Control:

1. In the **Export Limit** field, type the export limit (kW) value.
2. In the **Import Limit** field, type the export limit (kW) value.
3. Click **Save**.

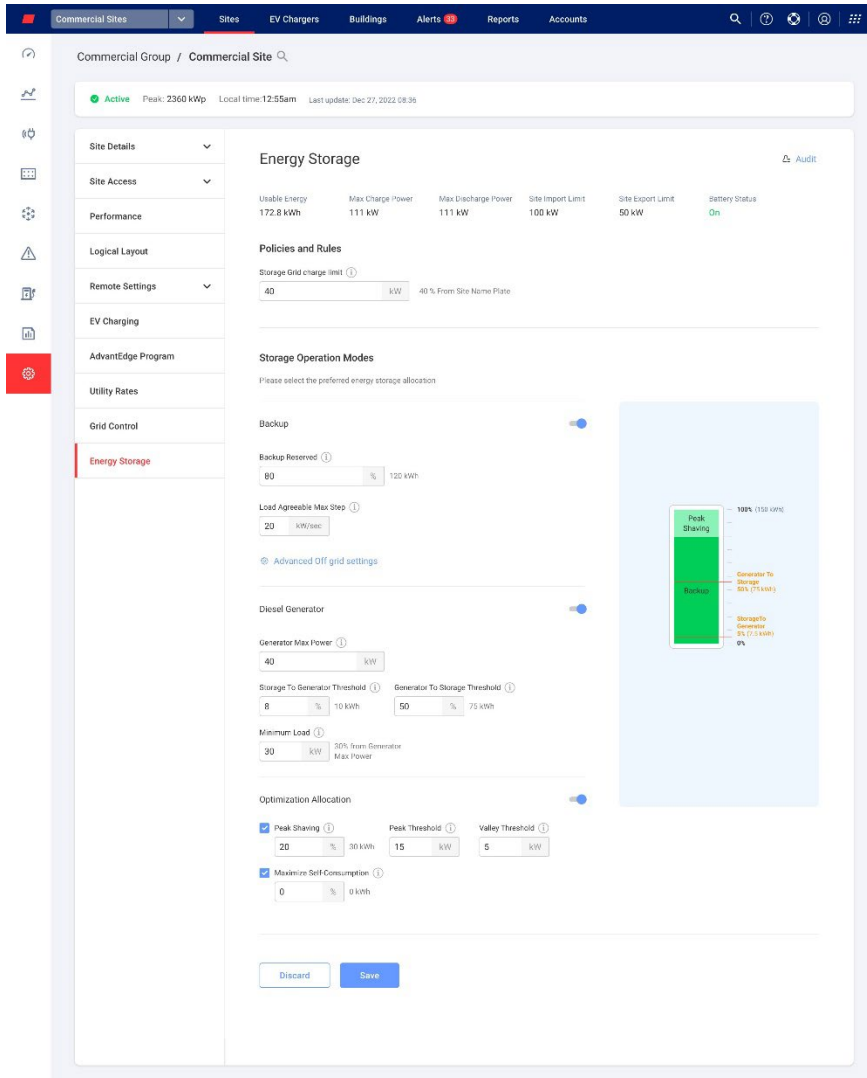
Your values are saved.

For tooltips on Export and Import Limits, click ⓘ.

NOTE

Zero export may be a regulatory requirement in your region. Please refer to local regulations for further information.

Energy Storage



In Energy Storage you set up your commercial battery and your Commercial Storage System (CSS).



NOTE

You cannot connect your battery system without a local controller on site.



NOTE

Energy Storage is only for battery settings. For full site commissioning, refer to the [SolarEdge Go app](#). For full site energy optimization, refer to the [Energy Board and Power Flow in SolarEdge ONE for C&I Application Note](#).

Storage solution values are displayed on the Energy Storage screen. These values enable you to decide how much storage should be allocated to backup and optimization. The following image displays storage solution values:

Energy Storage

Usable Energy	Max Charge Power	Max Discharge Power	Site Import Limit	Site Export Limit	Battery Status
172.8kWh	111kW	111kW	100kW	50kW	On

The following briefly explains each storage solution parameter:

- **Usable Energy:** This is the sum capacity of all battery modules.
- **Max Charge and Discharge Power:** The maximum and minimum value the battery can consume to charge and discharge fully.
- **Site Import Limit:** This is the import limit value set in Grid Control, and is the agreed limit above which the battery does not import from the grid.
- **Site Export Limit:** This is the export limit value set in Grid Control, and is the agreed limit above which the battery does not export to the grid.
- **Battery Status:** On/No Communication/Idle/Off/.

Policies and Rules

Storage grid charge limit: When importing from the grid, this is the maximum limit you allow the battery to charge to. In this field, you set how much power (wh) is charged to the battery from the grid. If a site import limit is set, the grid charge limit is a percentage of the total site import limit.

To set how much power is charged to the battery:

In the **Storage grid charge limit** field, type the battery charge limit.

Storage Operation Modes

Storage Operation enables you to set your preferred energy storage allocation.

- **Backup and Diesel Generator:** These modes are automatically switched ON if a Backup Interface (BUI) and/or a Diesel Generator is on site.
- **Optimization Allocation:** This mode is optional. The Optimization Allocation toggle is automatically switched ON unless you have a Backup Interface on site.

Backup

In **Backup**, you can edit the following fields:

- **Backup Reserved:** The percentage of your energy bank reserved for a power outage event.
- **Load Agreeable Max Step:** This is the maximum load change in kw/sec. For example, if a 50kw motor takes 10 seconds to shut off, the Load Agreeable Max Step is 5kw/sec.

To change or add values in Backup:

Type your values in the fields.



NOTE

The load agreeable max step value may need adjustment until you are satisfied with your system's performance.

Diesel Generator

This is the state of charge when the site's energy supply switches from battery storage to the diesel generator.

In **Diesel Generator** you can update the parameters in the following fields:

- **Generator Max Power:** The nameplate rating of the generator describing the max production power. Max power output of a diesel generator.
- **Storage to Generator Threshold:** The state of charge at which the site's energy supply switches to the Diesel Generator from Battery Storage.
- **Generator to Storage Threshold:** State of charge at which the site's energy supply switches to Battery Storage from Diesel Generator.



NOTE

The battery is only charged when the building load is less than the **GeneratorSetPoint**.

- **Minimum Load:** This is the smallest electrical load that the generator can reliably support without experiencing operational issues or damage. You can choose a minimum load value for loading the diesel generator. This value should be twice as much as the highest load on-site.

To change or add values in Diesel Generator:

Type your values in the fields.

Optimization Allocation

Optimization Allocation saves you money and optimizes energy when electricity prices are high.



NOTE

If you have a BUI on site, by default Optimization Allocation is switched OFF. You can switch ON Optimization Allocation by switching OFF the backup interface.

In **Optimization Allocation**, you can edit the following fields:

- **Peak Shaving:** This is used to reduce energy consumption during periods of high demand. Sites can adjust their operations to avoid high energy use during these peak periods. Peak shaving is the energy you use from the battery to during peak shaving. Once the import power reaches the peak shaving value the battery starts to discharge. You can set the following values for charging and discharging during peak shaving:

- **Peak Threshold:** the battery starts to discharge at this import power. The value can be up to 100%.
- **Valley Threshold:** The battery starts to charge at this import power. This value is lower than the Peak threshold, and is between 0% and the peak threshold value.

OR

- **Maximize Self-Consumption:** Batteries can store excess energy from PV during peak production times, for example sunny days, or for use during periods of low production or high consumption, for example at night time. The Maximize Self-Consumption value is the amount of energy allocated for battery discharge.

NOTE You can only choose Peak shaving OR Maximize Self-Consumption values in South Africa.

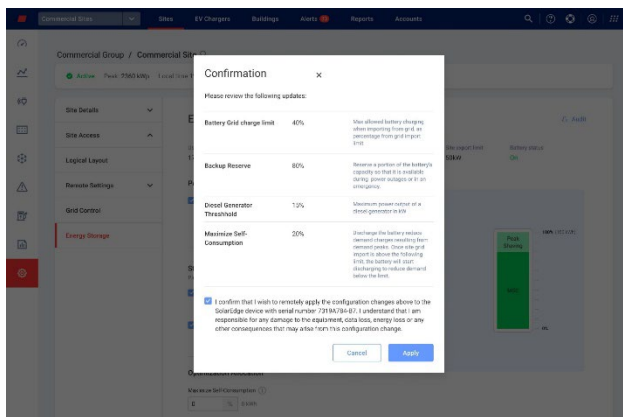
For tooltips on any of the above parameters click ⓘ.

To change or add values in Optimization Allocation:

Type your values in the fields.

To save your settings:

1. When you have typed all your values in the fields, click **Save**.
A pop-up is displayed with all your saved values.



2. Click **Apply**.
Your values are applied in **Energy Storage**.