PORTAL

HOW TO GUIDE

VERSION 1.1

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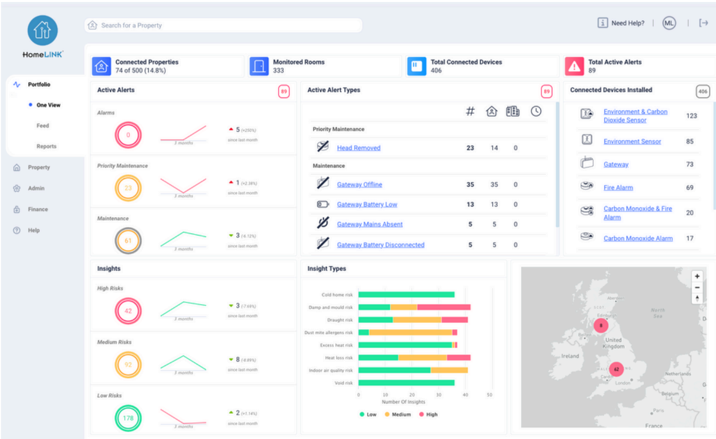
Section 1: Portfolio One View

As a whole view:



1a. What you can find here

The Portfolio One View, is your landing zone once you've logged in.

Here you will find live data regarding your whole property stock. Such as, Fire Alarm activations, head removals and the 8 Environmental Insights.

Here you can also see an overview of all of the devices you have installed and connected.

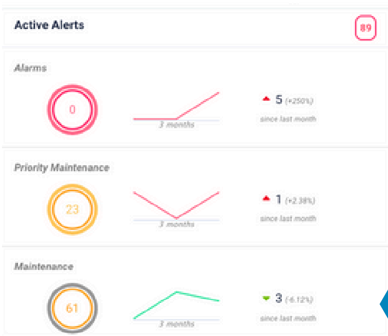
1b. How to Navigate the Portfolio One View

Active Alerts:

Alarms - This will show you any active alarm activations. You can click the circle, which will take you to an instant report of active alarms.

Priority Maintenance - Made up of (but not limited to) Head Removals, Faults, Prolonged Co2 Levels. Clicking the circle will take you to a report.

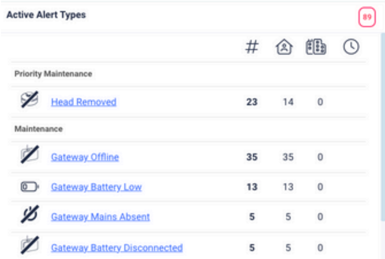
Maintenance - Made up of (but not limited to) Mains Absent, Batteries Low & Gateway Offline. Clicking the circle will take you to a report.



1b. How to Navigate the Portfolio One View

Active Alerts Types:
In this section, you will find a break down of all Active Alert Types, along with a total number for each.

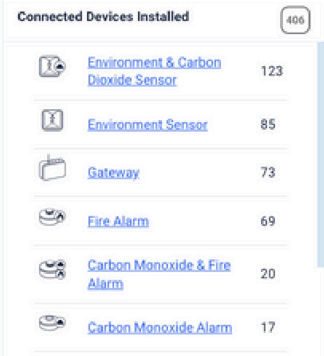
You can click on any of the underlined blue text and this will take you to a report that is filtered to the Active Alert Type you are looking for.



Connected Devices Installed:
In this section you will find a break down of all connected installed devices. It is worth noting that if you have installed devices but have not connected them, will not show here.

You can click any of the underlined blue text and this will take you to a report that is filtered to the Connected Devices Installed that you are looking for.

Please note that this does not show purchased devices it only shows the installed, connected devices.



1b. How to Navigate the Portfolio One View

Insights:
High Risk - The conditions in the property are at high risk of developing into a problem. Investigate at the earliest convenience, dependent on your capacity.

Medium Risk - Become proactive; try keeping an eye on to avoid any high risks developing.

Low Risk - This is positive, things are going well.

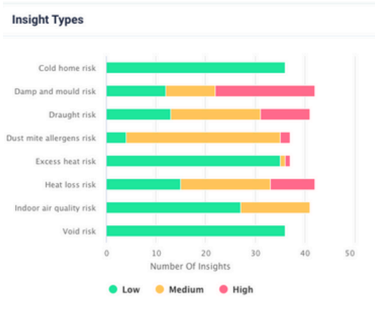
You can click the circle on any of the insights and it will take you to a report filtered to the circle you clicked on. For example if you click the High Risk circle the report will show you all properties with a High Risk Insight.

Risk levels are calculated from 0-100 (0 being no risk & 100 being a high risk of developing into something more serious).

1b. How to Navigate the Portfolio One View

Insight Type:

The 8 insight types are broken down into colour coded sections by Insight Risk Level; you can click on any coloured bar which will take you directly to a report filtered to what you clicked on.



Red - High Risk
Yellow - Medium Risk
Green - Low Risk

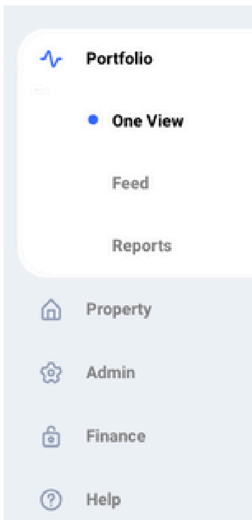
A breakdown of how the insights are calculated can be found on our knowledge base via the help button on the Portal.

Interactive Map:

Portfolio One View Map - Here you can view a map of where your properties are.
The properties are colour coded by overall risk level.
You can click on the house icon and that will show you the address and blue link to take you to the Property One View.

Side Bar:

Here you can easily click between sections of the portal.



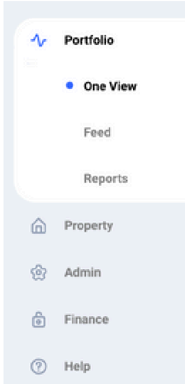
Portfolio:

- One View - Landing page as shown earlier
- Feed - Full list of alerts
- Reports - Customisable to what you are looking for

Property:

- One View - Overall view of individual property chosen
- Fire & CO - Breakdown of alerts and Fire and CO devices
- Environment - View Humidity and Temperature graphs / Damp and Mould Risk Components Graph / Insights
- Well-Being - View CO2 and Temperature Graphs / Insights
- Devices - Full list of all connected devices at the property chosen

1b. How to Navigate the Portfolio One View



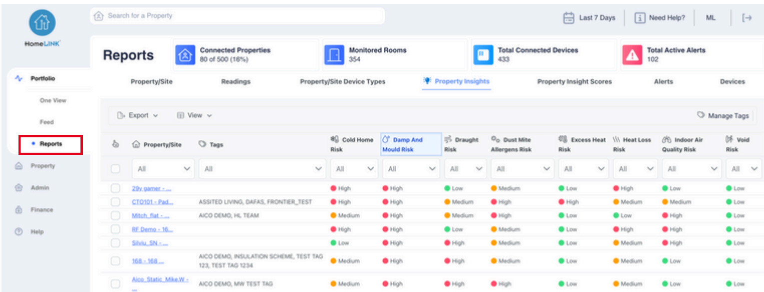
Admin:
- Accounts - Create, manage, amend, delete
- Notifications - Create, manage, amend, delete

Finance:
- Here you can view invoices and raise orders. You can see all licences and manage your subscriptions.

Help:
- Access to the knowledge base

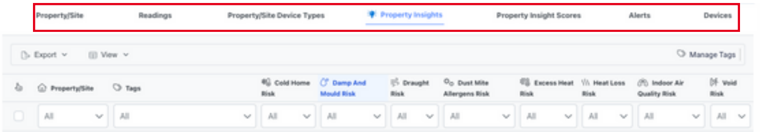
Section 2: Reports Tab

As a whole view:



When viewing a report, you can click on any of the blue highlighted properties and this will take you straight to the property one view for that property.

2a. How to Navigate the Reports Tab



Reports Navigation Bar:
Property/Site - Report based on property details input at point of install for example, building and heating types across the whole stock.

Readings - Slice and dice readings from your whole stock for Humidity, Temperature and CO2 in whatever way you require - average, minimum, maximum, year, month, week or day.

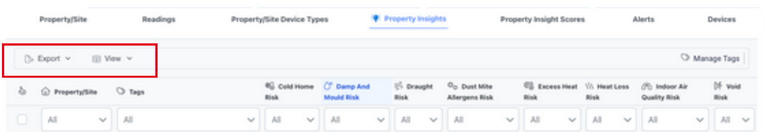
Property/Site Device Types - Yes/No report of which devices installed i.e yes env sensors

Property Insights - Report of full stock insight risk levels

Alerts - Breakdown of Alerts, Priority Maintenance & Maintenance Alerts for whole stock

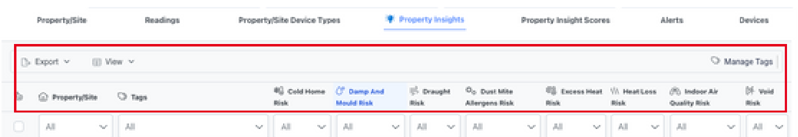
Devices - Breakdown of all devices installed across whole stock

2a. How to Navigate the Reports Tab



Export/View:
Export - Clicking this will give you the option for export the data you're currently viewing as an Excel Spreadsheet or a CSV.

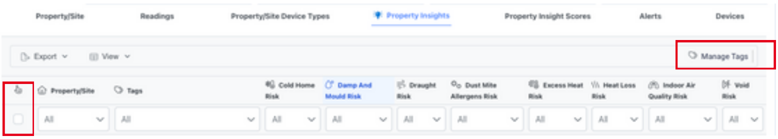
View - Can be used to reset the filters you have added to the data.



Column Filters:
The Column Filters will change dependent on what type of report you are viewing. You can click each to change the way you are viewing the data in the column, for example if you clicked property/site it would change it to showing you the properties in alphabetical order.

Upon clicking the drop downs below the column headers you can filter even further. It allows your to search and adapt what you are looking at.

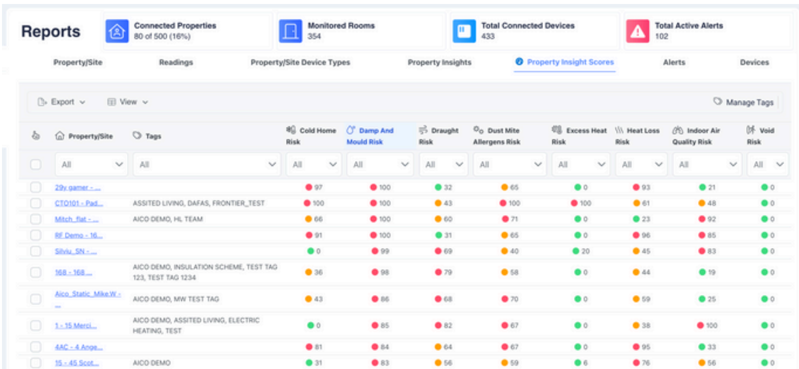
2a. How to Navigate the Reports Tab



Manage Tags:
A quick way to tag multiple properties is to come into the reports. Select the properties you'd like to tag. Then select Manage tags, input the tag you'd like you like to use, click enter on your keyboard, then finally click save.

2b. The New Property Insight Score Report

As a whole view:



<u>Insight Score Report</u>
The new report shows you the risk score from 0-100 for each insight. 0 is no risk and 100 is a really high risk.

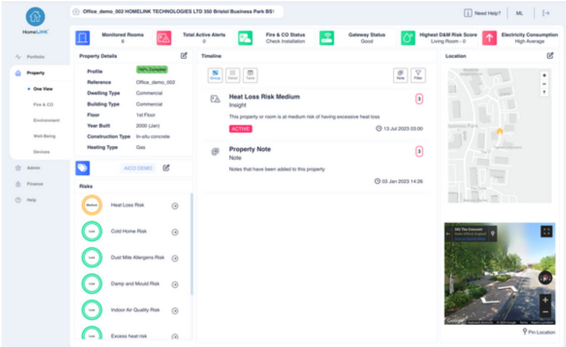
The idea behind this is to allow you to be able to work on the properties with the highest risk first.

The brackets for each risk level are:

Insight Risk Level	Colour	Score
Low		0-33.3
Medium		33.4-66.6
High		66.7-100

Section 3: Property One View

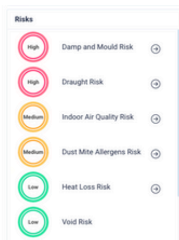
As a whole view:



3a. How to Navigate

Property Details:
Inputted at point of install. Can be edited using the small button on the right hand side that looks like a pencil and paper.

Tags:
Tags can be added to help you identify if a property belongs to a certain project or area, etc.
Tags are currently free text so you're able to add whatever tags you'd like to properties.



Insight Risks:
This is a colour coded breakdown of the insight risks for the property. They are colour coded using the colouring we spoke about on Page 4, relating to Insights Risk.
If you click on the circle, it will show you the risk at room level rather than whole home.
The different icons help you distinguish which room the risk is coming from, for example the bed icon would indicate bedroom.

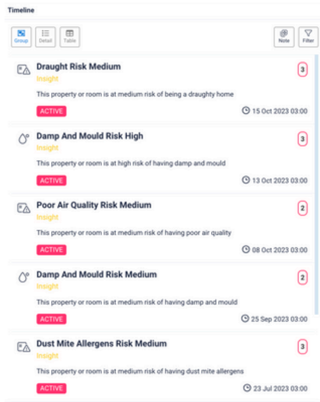
Humidity, Temperature and CO2 data is taken every 15 minutes. The calculations on how this data is used to generate our insights, can be found on our knowledge base.

3a. How to Navigate

Timeline:

The timeline is a breakdown of insight risks raised in the time period chosen to look at. It will default to all time.

To view resolved insight risks, you would need to change your view to detail on the left hand side and then you can click filter and tick ‘Include Resolved’.

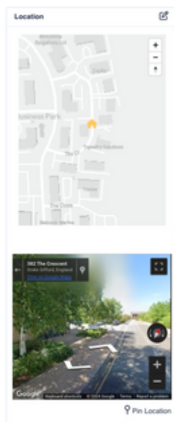


If you want to export this data, you can click table along the left hand side and then you will have the option to export via Excel or CSV.

On the right hand side you can see the button to add a note. We advise you add notes as often as you can; including any works done at the property so you can then see if that work has been successful if the risk level changes.

Location:

Not always available on New Build Properties.



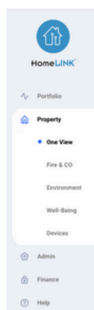
The house is colour coded on the map using the colour of the risk level for the overall property. You have a simple map and street view.

If the location is incorrect you can use the edit button on the right hand side.

Side Bar:

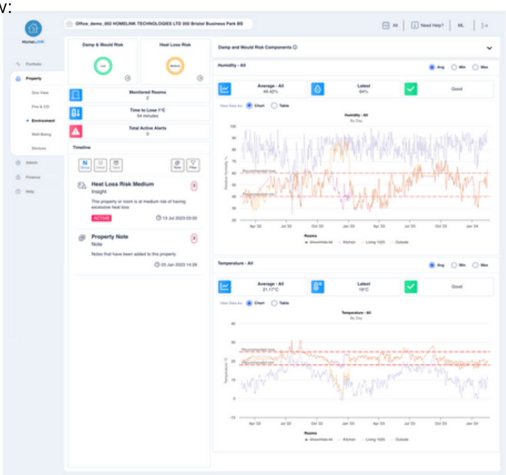
<u>Property:</u>

- <u>One View</u> - Overall view of individual property chosen
- <u>Fire & CO</u> - Breakdown of alerts and Fire and CO devices
- <u>Environment</u> - View Humidity and Temperature graphs / Damp and Mould Risk Components Graph / Insights
- <u>Well-Being</u> - View CO2 and Temperature Graphs / Insights
- <u>Devices</u> - Full list of all connected devices at the property chosen



Section 4: Property Data

As a whole view:



4a. Environment Tab

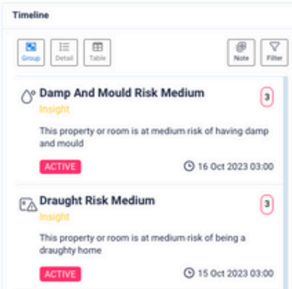
Insight Risk Icons these are interactive, if you click them they will show you the room level risk as colours.

Monitored Rooms, just a quick show of how many rooms within this property are covered.

Time to lose 1°C is showing you how good the thermal performance of the property is based on how quickly temperatures drop. The calculations can be found on the Knowledge Base but the higher the better!

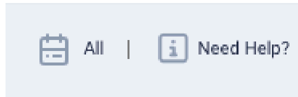
Total Active Alerts will show how many alerts are happening within the property.

Timeline:
The timeline is a view of the insights / events for the property you are looking at. It is worth noting that if you change the date range, this will change the insights you are viewing to ones during the date range chosen.



4a. Environment Tab

All Button this button will allow you to change the date range you are looking at.



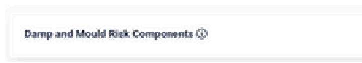
Need Help - this button will take you to our Knowledge Base where you can find a variety of resources.

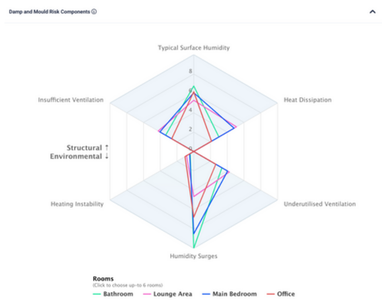
Humidity Graph
Along the top of each graph you can see an average reading and the latest reading. On the left axis you have 0% - 100% and the dates along the bottom axis.
The red dotted lines are the minimum and maximum recommended levels for humidity.
You can click on the room names below the graph and toggle which rooms you are looking at.
You have the ability to chose table view instead of chart view which is where you can export the humidity readings if needed. The data you're viewing in the table will be inline with the date range selected.

Temperature Graph
Along the top of each graph you can see an average reading and the latest reading. On the left axis you have -10 degrees to 40 degrees and the dates along the bottom axis.
The red dotted lines are the minimum and maximum NHS recommended levels for temperature.
You can click on the room names below the graph and toggle which rooms you are looking at.
You have the ability to chose table view instead of chart view which is where you can export the temperature readings if needed. The data you're viewing in the table will be inline with the date range selected.

4a. Environment Tab

<u>Damp and Mould Risk Components</u>
This can be found on the environment tab and is what you need to click to open up the below graphs.

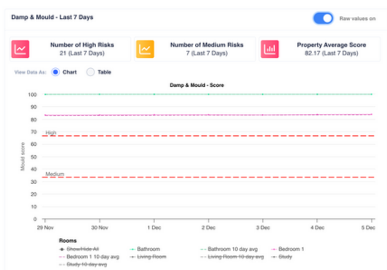




<u>Damp and Mould Risk Components Graph</u>
The graph is showing risk level from 0 to 10. 0 in the middle and 10 being on the outside.

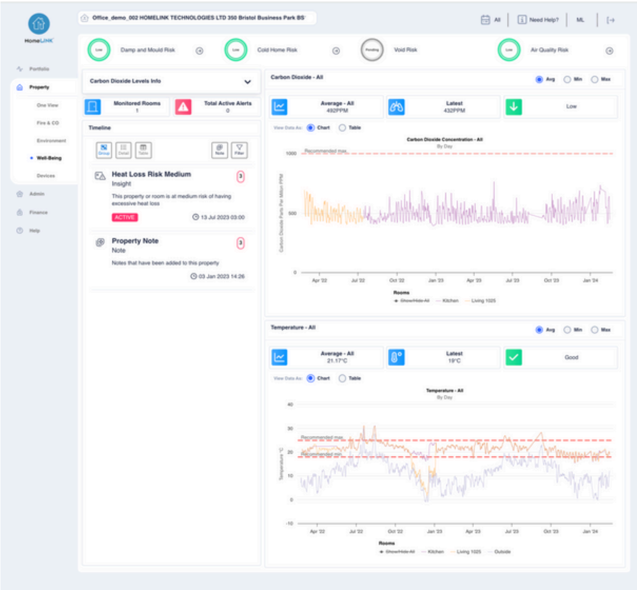
For an in depth understanding of this graph you can click the little “i” button and that will take you to Knowledge Base.

<u>Damp and Mould Risk Components Continued</u>
The new risk score graph can be found within the SvE dropdown.
This is showing the same 0-100 score as the new report but over time and will react to your date/time selection at the top of the page, much like the temperature & humidity graphs
By default, you will see the 10-day moving average for each room. You can, however, display the value that is calculated for each room on a daily basis, too. To do this, use the "Raw values" toggle at the top right of the graph.
The idea of this graph is to help RSL’s see if the risk level changes and reduces after doing any form of intervention.



4b. Wellbeing Tab

As a whole view:



4b. Wellbeing Tab

<u>CO2 Graph</u>

Along the top of each graph you can see an average reading and the latest reading. On the left axis you have 0PPM - 10,000PPM and the dates along the bottom axis. The red dotted line is the maximum recommended levels for indoor CO2 levels.

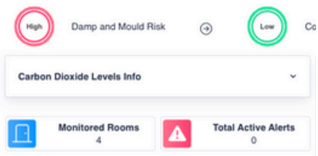
You can click on the room names below the graph and toggle which rooms you are looking at.

You have the ability to chose table view instead of chart view which is where you can export the CO2 readings if needed. The data you're viewing in the table will be inline with the date range selected.

Further information regarding CO2 can be found to the left of the graph, please see below.

4b. Wellbeing Tab

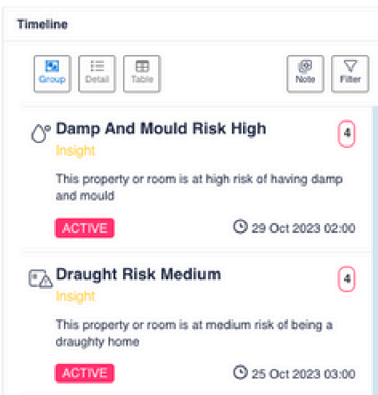
Risk Circles - you can click these are they will show you a room icon.
Carbon Dioxide Levels Info - if you click the little arrow it will show you a drop down explaining the impacts at different PPM levels.
Monitored Rooms - shows you how many rooms in this property are connected
Total Active Alerts - shows you any alerts that are active at this moment in time



Temperature Graph
Along the top of each graph you can see an average reading and the latest reading. On the left axis you have -10 degrees to 40 degrees and the dates along the bottom axis. The red dotted lines are the minimum and maximum NHS recommended levels for temperature.
You can click on the room names below the graph and toggle which rooms you are looking at.
You have the ability to chose table view instead of chart view which is where you can export the temperature readings if needed. The data you're viewing in the table will be inline with the date range selected.

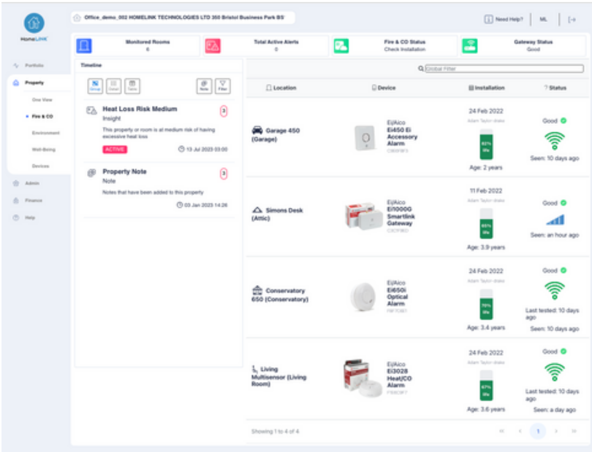
4b. Wellbeing Tab

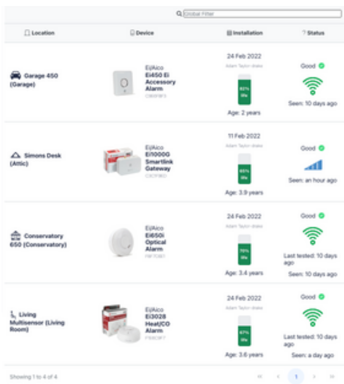
Timeline:
The timeline is a view of the insights / events for the property you are looking at. It is worth noting that if you change the date range, this will change the insights you are viewing to ones during the date range chosen.



4c. Fire & CO Tab

As a whole view:

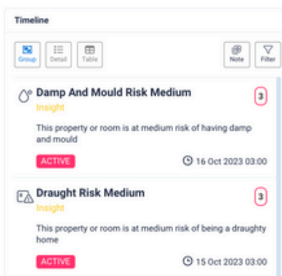




__Device List__
The device list on the Fire & CO Tab will only show you the devices relevant to Fire & CO along with the Gateway.

The battery infographic showing is the device life since the device came out of the factory; it is not since install.

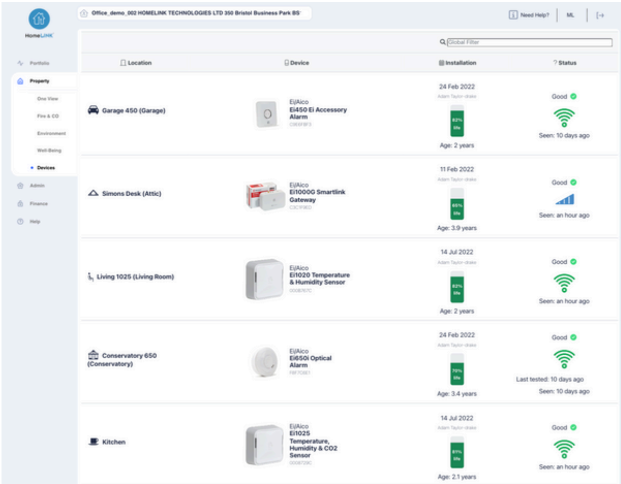
4c. Fire & CO Tab



__Timeline:__
The timeline is a view of the insights / events for the property you are looking at. It is worth noting that if you change the date range, this will change the insights you are viewing to ones during the date range chosen.

4d. Devices Tab

As a whole view:



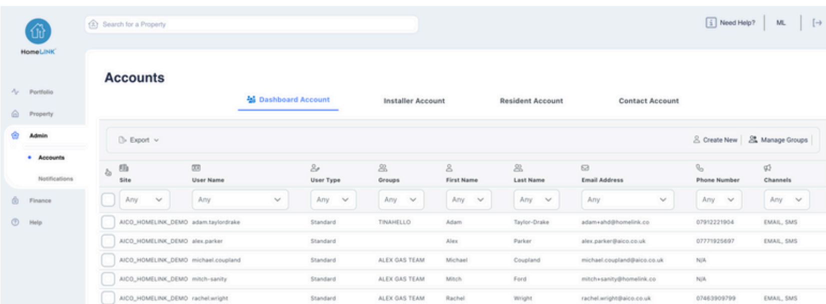
<u>Device List</u>

Unlike the Fire & CO tab, the Devices Tab will show you all of the connected devices within the property you are looking at. This will include, the battery life, signal strength, location name of the device, and the serial numbers.

You can click on the device to see a device-specific timeline, helping you identify if there are any problems with the device.

Section 5: Admin - User Accounts

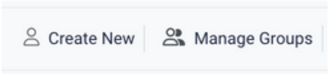
As a whole view:

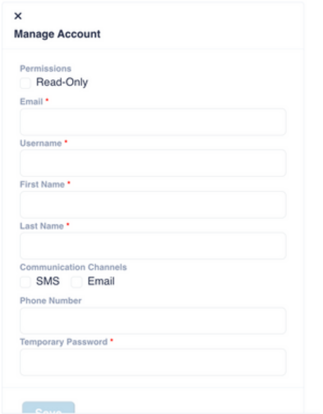


5a. How to Create User Accounts

To Create:
- Click Create New
- Fill in form below, with new users details
- Only select Read-Only if you would like the user to not be able to make changes (Read-only users cannot create/amend user accounts of any kind, notifications, tags or notes).
- Ensure at least one communication channel is selected to enable the user to receive notifications
- Once completed, click save

Once created the new user will receive an email, with their username and password. Along with a link to the Portal.

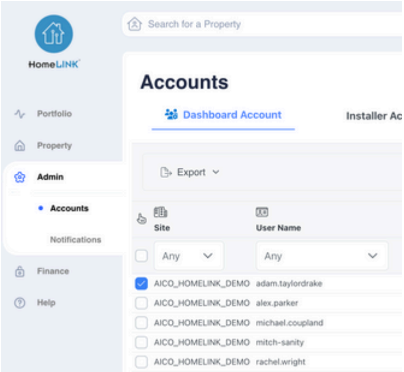


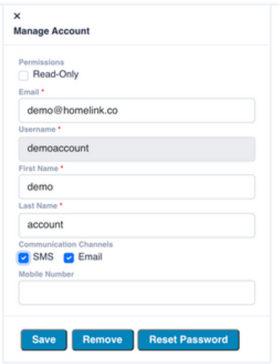


5b. How To Amend or Remove a User

To amend or remove:
- Select the users by ticking the box next to their name/names
- This will open up the Manage Account box for you
- Here you can amend any of the information you see
- Once completed, click "Save"
- If removing click the "Remove" button at the bottom.

If the user needs a password reset, follow the same process and just click "reset password"

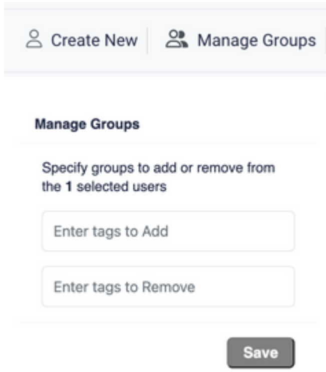




5c. How To Set Up User Groups

To set up a group:

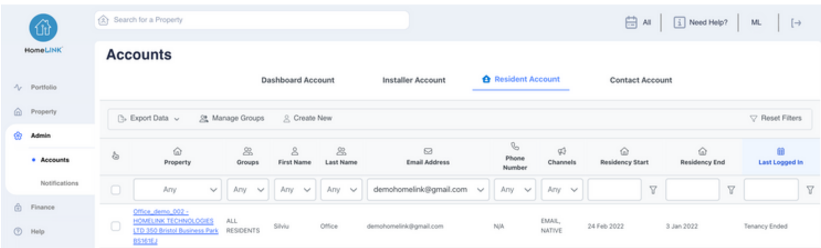
- Select the users you wish to group by ticking the box next to their name/names
- Click manage groups
- Use free text to fill out the "enter tags to add" box. Hit the 'tab' or 'return' button on your keyboard or click somewhere on the 'Manage Groups' box to create the group name.
- Once completed, click save



To remove the groups, follow the same process but use the "enter tags to remove" box rather than the "enter tags to add" box.

Section 6: Resident Accounts

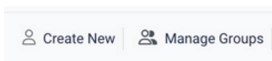
As a whole view:

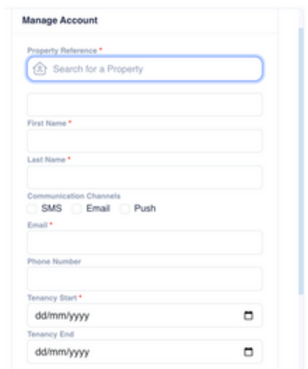


6a. How to Create/Terminate/Amend Resident Accounts

To Create:

- Click Create New
- Chose the property address the tenant belongs to
- Fill in form below, with the residents details
- Ensure at least one communication channel is selected to enable the user to receive notifications ('Push' is always first preference!)
- Fill out the tenancy start date and leave the tenancy end date blank, unless known
- Once completed, click save

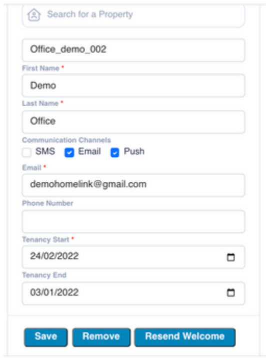




6a. How to Create/Terminate/Amend Resident Accounts

To remove the resident from the resident app, simply come back to the residents app tab, select the resident and enter a tenancy end date. This will kick them out of the resident app permanently when that date passes.

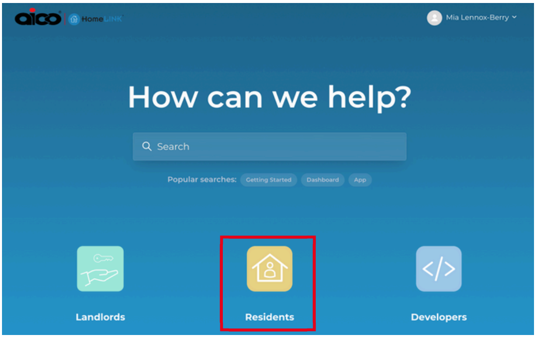
To amend a residents details, select the resident, select manage account, edit details, click save.

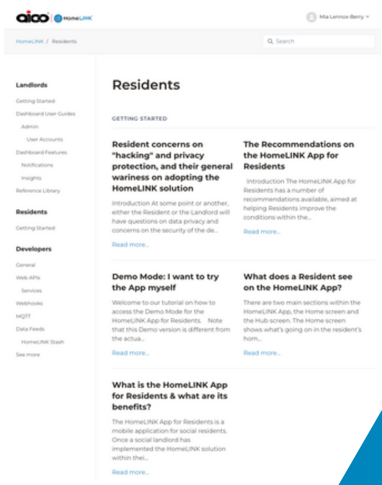


6b. How To Find Help For Resident Accounts

To find help:

- Click need help on the top right corner of any dashboard page in the portal - this will take you to Knowledge Base
- Click Residents once on the Knowledge Base
- Click into any support resource you need within the Knowledge Base





6c. Want To Try The Resident App yourself?

Simply follow these steps:

Step 1: Download the app from the Playstore or Apple Store (search for "HomeLINK App for Residents)

Step 2: Enter your email address (any of your email addresses will suffice, you do not need to have a Resident Account created beforehand)

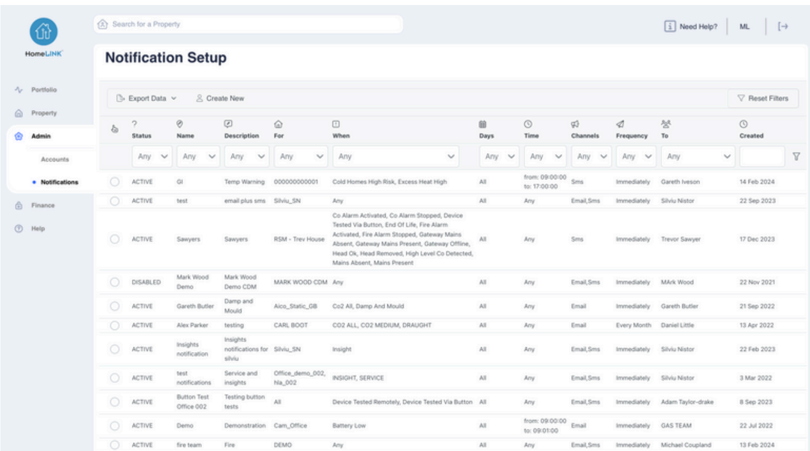
Step 3: Under "Postcode", enter the following: DEMO

Step 4: You're in! You will be greeted by the walkthrough on the app. Once you've gone through that, you will be able to navigate as a Resident.

Step 5: When you turn the dial and navigate to a room, you will see the 5 different Linky Moods at the very top, as seen in the gif below. ***Note: This does not appear for the Resident.*** We use Linkys Moods to assign the level of severity of a home's health and in the Demo Mode, we have added them as *buttons* you can tap on to see how conditions differ between them. **Note: This is just an example of a mixture of conditions that will trigger each of Linky's Moods.**

Section 7: Notifications

As a whole view:

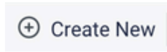


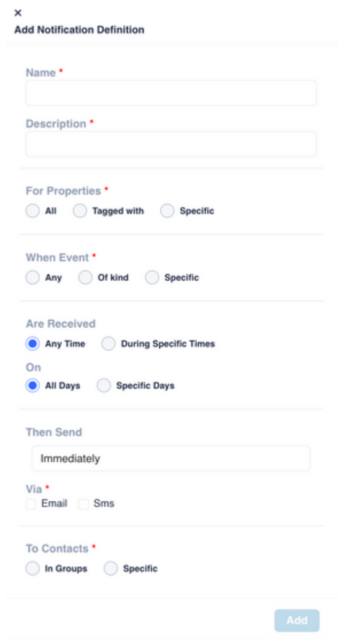
Status	Name	Description	For	When	Days	Time	Channels	Frequency	To	Created
Any	Any	Any	Any	Any	Any	Any	Any	Any	Any	
ACTIVE	GI	Temp Warning	000000000001	Cold Homes High Risk, Excess Heat High	All	from: 09:00:00 to: 17:00:00	Sms	Immediately	Gareth Iveson	14 Feb 2024
ACTIVE	test	email plus sms	Silviu_SN	Any	All	Any	Email,Sms	Immediately	Silviu Nistor	22 Sep 2023
ACTIVE	Sawyers	Sawyers	RSM - Trev House	Co Alarm Activated, Co Alarm Stopped, Device Tested Via Button, End Of Life, Fire Alarm Activated, Fire Alarm Stopped, Gateway Mains Absent, Gateway Mains Present, Gateway Offline, Head Ok, Head Removed, High Level Co Detected, Mains Absent, Mains Present	All	Any	Sms	Immediately	Trevor Sawyer	17 Dec 2023
DISABLED	Mark Wood Demo	Mark Wood Demo CDM	MARK WOOD CDM	Any	All	Any	Email,Sms	Immediately	MArk Wood	22 Nov 2021
ACTIVE	Gareth Butler	Damp and Mould	Aico_Static_GB	Co2 All, Damp And Mould	All	Any	Email	Immediately	Gareth Butler	21 Sep 2022
ACTIVE	Alex Parker	testing	CARL BOOT	CO2 ALL, CO2 MEDIUM, DRAUGHT	All	Any	Email	Every Month	Daniel Little	13 Apr 2022
ACTIVE	Insights notification	Insights notifications for silviu	Silviu_SN	Insight	All	Any	Email,Sms	Immediately	Silviu Nistor	22 Feb 2023
ACTIVE	test notifications	Service and insights	Office_demo_002, hla_002	INSIGHT, SERVICE	All	Any	Email,Sms	Immediately	Silviu Nistor	3 Mar 2022
ACTIVE	Button Test Office 002	Testing button tests	All	Device Tested Remotely, Device Tested Via Button	All	Any	Email,Sms	Immediately	Adam Taylor-drake	8 Sep 2023
ACTIVE	Demo	Demonstration	Cam_Office	Battery Low	All	from: 09:00:00 to: 09:01:00	Email	Immediately	GAS TEAM	22 Jul 2022
ACTIVE	fire team	Fire	DEMO	Any	All	Any	Email,Sms	Immediately	Michael Coupland	13 Feb 2024

7a. How To Create A Notification

Creating a Notification:

- Click Create New
- Name - what you'd like the notification to be called
- Description Box - this is what will show in the email notifications subject line, upon receiving the notification
- For Properties - you have 3 options. All - will set up for all properties in the RSL's stock, Tagged With - will generate notifications for the properties that are tagged with that specific tag (to refresh on tags go to the Property Chapter), if you choose specific this will allow you to choose specific addresses.
- When Event - The event or insight type(s) the RSL wants the Notification to relate to.
- Are Received - is looking at when the event occurs for it to trigger this notification, not when it is going to be sent out***
- Then Send - Select the frequency you'd like the notification to be sent, if you choose weekly this will be sent on a Monday at 9am, if you choose Monthly this will be sent on the 1st of the month at 9am.
- Via - The way you'd like to receive the notification, either email or SMS
- To Contacts - Groups, the accounts you have grouped in the account dashboard, Specific is to select individuals
- Once done click Add to save



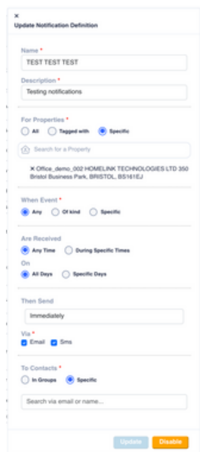


***Are Received Continued:
If the RSL is setting up a notification for an Insight Risk please ensure this only set to Any Time and Any Day, as the insights come in at around 2am.
If the RSL is setting up notifications for Fire and CO Activations this can then be customised to suit specific times and days for in hours and out of hours on call teams.

7b. How To Amend/Disable A Notification

Amending/Disabling a Notification:

- Select the Notification you'd like to edit
- The notification box will then open
- You can amend any details you like then click Update to save
- If you'd like to Disable the notification, simply click Disable and this will stop the notification from being sent anymore



Section 9: Need Further Help?

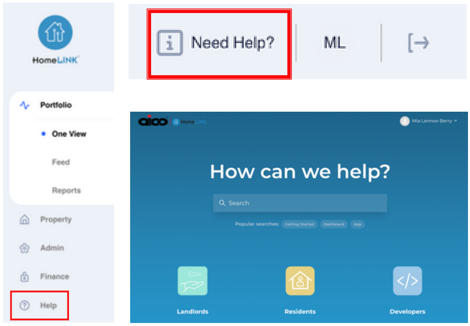
There are a few options for further support!

9a. Knowledge Base

To access the knowledge base you can click any of the need help buttons on the portal.
On the knowledge base you will find an abundance of resources, including things like:

- Insights article, explaining how they are all calculated (Landlords Section)
- How to try the resident app yourself (Residents Section)
- How we can do API's (Developers Section)

Along with so many other support documents.



9b. Technical Support

You can contact the Aico Technical Support department using the below details:

Contact Number: 01691 664 100
Contact Email: enquiries@aico.co.uk
Website: aico.co.uk