OpenEye® web services

OPENEYE WEB SERVICES

BEST PRACTICE FOR SETTING UP CERTIFIED CHANNEL PARTNER DEMO SITES

The OpenEye Web Services (OWS) Account is created by the OpenEye inside sales team when the Certified Channel Partner (CCP) signs up and CCP Admin invited to the account.

- The CCP Admin should be a technical role with authority within the company; this person will become the Subject Matter Expert (SME). This person is generally in the operations side of the business and will be ultimately responsible for credentialing all users.
- OpenEye recommends personnel with lead roles in Tech Support, Customer Service, Managed Services, Operations, etc be added with appropriate credentials needed to achieve their jobs.
    - These credentials should be added in the CCP management portal (Orange)
- Sales personnel should be added at the End User (EU) access level (Blue) as they will be demonstrating EU features and benefits.

The following guide outlines the steps that should be taken by the primary admin on the CCP account to setup a demo for the sales team to use in selling to EU customers. The essentials of this guide can also be used in spinning up new customer accounts.

CREATE AND CONFIGURE A DEMO END USER CUSTOMER ACCOUNT

The first part of the setup will be performed at the CCP level (orange menu bar along the top).

ADD THE CUSTOMER ACCOUNT

Click Add New Account, and enter the appropriate information to create a demo EU customer account.

- Tip: Be thorough, make up an Account ID, and fill in the City, State, and Zip. This makes for a much more professional presentation for sales.

ADD THE RECORDER

Click Manage for the demo EU account. Make note of the Recorder Registration Code and add the recorder to the demo EU account. Here's a video on how to add the recorder using the registration code: https://www.youtube.com/watch?v=_MHauPKXXjY

- At a minimum, one recorder with 4+ cameras is needed.
- OpenEye recommends two or three recorders if possible with several cameras on each.
- OpenEye can provide access to additional demo sites for your sale personnel as needed by request.

ENABLE REPORTS AND ALERTS

While still in the Manage section for the account, click Report and Alert Options on the left menu, then select the following options and click Save.

- Enable Health Alerts for this Account
- Enable Non-Health Alerts for this Account
- Enable Analytics Alerts for this Account (if access to an analytic camera is an option)
- Enable Intrusion Alerts for this Account (if access to an intrusion panel is an option)
- Enable Reports for this Account

- Day/Night Images Report
- System Summary Report
- Inventory Report

If any 3rd party integrations will be used on the demo EU account, (Like DMP, Bold, I-View Now, SureView, MASVideo, etc). Choose the integration option(s) on the left and enabled the settings for it.

Once complete return to the Customer Accounts list; then Select the demo EU account to enter the account. The second part of the setup will be performed at the EU level (blue menu bar along the top).

CREATE A USER GROUP FOR THE SALES TEAM

Click the settings gear in the upper-right and choose User Groups; then click Add New User Group.

- OpenEye recommends naming this group clearly with the CCP company name and “Sales Team.”
- Eg: “Liberty Security Sale Team Access” “Triple-A Video Sales Team” “N.V.V. Sales Team”

ASSIGN APPROPRIATE PERMISSIONS

Enable the permissions listed below for each section within the User Group. Note that there are some optional items; and some that are optional that will only be used by someone who is an advanced user.

If you will have users that you consider advanced users, create two user groups. Continue the process below for the first group without enabling the “advanced users” options. Once complete, create a second group and follow the process below while enabling the “advanced users” options.

Web Services Permissions

- Access Other Users’ Video Clips
- Edit Video Clips
- Share Video Clips
- View Video Clips
- Recorder Access
- View Reports
- Create/Edit Reports (optional, for advanced users)
- View Alerts
- Create/Edit Health Alert Rules (optional, for advanced users)
- Create/Edit General Alert Rules (optional, for advanced users)
- Allow Third Party Integration Access (only if push integrations like Bold, I-View Now, or SureView will be used)

2-Step Verification

- Enable 2-Step Verification (optional, recommended)

This option will force the sales team to enter a multi-factor authentication code that is texted to them whenever they log into a system they have not logged into recently. OpenEye recommends enabling this feature; especially for sale personnel following the ‘OWS Ease of Use’ guide, and demonstrating on the prospect’s computer.

Recorders / Cameras

Select Add Recorder. Choose the option to automatically include all recorders in this User Group; then click Add.

Recorder Permissions

- Video: View Live Video
- Video: View Recorded Video
- Video: Export Video
- Video: Control PTZ
- Setup: Access Power Off / Restart Options

Command Station Permissions

- View Shared Camera Layouts
- Manage Shared Camera Layouts

CONFIGURE REPORTS

Click the Reports menu, and customize the three template reports.

SYSTEM SUMMARY

Look at the Report Type column, and click Edit on the **System Summary** report. Start by changing the name to something that will show better to a potential customer during a presentation. This is a premium service being offered to the customer, it shows health status, storage, usage data, day/night images; it is almost more of a dashboard than a report.

- Eg: “Premium Health & Usage Dashboard” or “Primary Health & Status Report”

The description field can be blanked out, or used to create a longer description of what the report provides.

Report Definition

All options will be selected by default, and OpenEye recommends leaving all selected. Review the description of each, and determine if there are any that the sales team should not be showing.

Recorders

By default this will be set to auto-include all recorders. OpenEye recommends leaving this setting to insure any recorders added to the demo EU account will be added to this report.

Health Rules

Default rule definitions are recommended; review and adjust as necessary.

User/Notifications

Click Add Group and select the sales team User Group created previously (this insures the sales team will be able to see the report when demonstrating to an end user).

Email Reminders are optional; OpenEye recommends enabling and setting to send weekly (remember to select the Send Email option for the group once Email Reminders have been enabled).

Return to the main Reports menu when complete.

DAY/NIGHT REPORT

Look at the Report Type column, and click Edit on the **Day/Night** report. Keeping this report is optional, since the System Summary report also includes day/night images; this a report dedicated to only day/night images. To remove it, just click Delete Report. To keep it, start by changing the name to something that will show better to a potential customer during a presentation. This is a basic report that contains four thumbnail images of each camera; two reference and two current, from midnight and noon.

- Eg: “Premium Image Verification Report” “Day/Night Image Report” “Camera Image Verification”

The description field can be blanked out, or used to create a longer description of what the report provides.

Recorders

By default this will be set to auto-include all recorders. OpenEye recommends leaving this setting to insure any recorders added to the demo EU account will be added to this report.

User/Notifications

Click Add Group and select the sales team User Group created previously (this insures the sales team will be able to see the report when demonstrating to an end user).

Email Reminders are optional; if the System Summary report is being emailed, OpenEye recommends not enabling email on the Day/Night report in addition.

Return to the main Reports menu when complete.

INVENTORY REPORT

Look at the Report Type column, and click Edit on the **Inventory** report. Keeping this report is optional. It may not show as nicely on an account with only one or two recorders; but is especially useful for customers with a large number of recorders. To remove it, just click Delete Report. To keep it, start by changing the name to something that will show better to a potential customer during a presentation. This is a table listing all of the recorders on the account with details like serial number, MAC address, model, license, last connection time, and software version.

- Eg: “Recorder Inventory Report” “NVR Asset Report” “Recorder Info Summary”

The description field can be blanked out, or used to create a longer description of what the report provides.

Recorders

By default this will be set to auto-include all recorders. OpenEye recommends leaving this setting to insure any recorders added to the demo EU account will be added to this report.

User/Notifications

Click Add Group and select the sales team User Group created previously (this insures the sales team will be able to see the report when demonstrating to an end user). OpenEye does not recommend email reminders for this report.

CREATE ALERT RULES

Hover over the Alerts menu and click Alert Rules, then create rules by click Add New Rule.

HEALTH ALERTS

Add a new rule and choose Health Alerts for the type, then give the rule a name. Something as simply as "Health Alert" is fine, but if this will be offered as a premium service, be creative with something like "Premium Recorder Health Notifications." Description is optional.

Rule Definition

Default rule definitions are recommended; review and adjust as necessary. These default to the same settings as the Summary Report Health Rule Definitions, and OpenEye recommends setting these the same if they were changed in Reports.

Recorders

Click Add Recorder, and select the option to automatically include all recorders in this Alert Rule.

Users/Notifications

Click Add Group, and select the sales team User Group created above. Select the option to Send Email for the group.

MOTION ALERTS

Optional: Add a new rule and choose Motion Alerts for the type, the give the rule a name. Something simple like "Opening Motion Alerts" will work fine for this. Description is optional.

Rule Definition

Use the time range options to specify a relatively short windows of time that corresponds to the building opening; for example if the employees arrive around 8AM, set the range for 745AM to 815AM.

- Note: If the cameras on the recorder do not have visibility of the entrance, select a time range that the cameras are likely to have activity within the field of view.

Select the days of the week that the building is open; leave the default duration of 5 seconds.

Cameras

Click Add Camera, and select one or more cameras that will have visibility on activity for the time range selected above.

Users/Notifications

Click Add Group, and select the sales team User Group created above. OpenEye does not recommend sending an email to the sales team for motion events.

SENSOR ALERTS

OpenEye highly recommend installing a door contact (or something similar) with the connection wired into the sensor input on the recorder or a camera with alarm sensor input. Once connected, and configured within the recorder, proceed with configuring a sensor alert.

Add a new rule and choose Sensor Alerts for the type, then give the rule a name. Something simple like “Front Door Sensor Alerts” will work fine for this. Description is optional.

Rule Definition

Use a time range that will generate a reasonable amount of alerts. For a busy door, setup a one hour range for opening and a one hour range for closing. For a low activity door set it to always be active (set the time range for 12AM-12AM). Select the days of the week that the building is open; leave the default duration of 5 seconds.

Sensors

Click Add Sensor, and select the sensor that has been configured. Note this needs to be enabled, configured, and have a camera associated in the recorder setup.

Users/Notifications

Click Add Group, and select the sales team User Group created above. OpenEye does not recommend sending an email to the sales team for sensor events.

ANALYTIC ALERTS

Optional. Can only be configured if an analytic camera (like Hanwha X-Series) has been configured and connected to the recorder. Add a new rule and choose the analytic option, then give the rule a name. The name will depend on what analytic events the camera is sending to the recorder, and what alerts the sales team can best show to a customer.

- Note: If email notification will be sent, insure the camera has been tuned before enabling.

Rule Definition

Define the Event Group and Event Type based on what events the camera configured for. Add additional as needed. Define the time range and days that the alerts should be generated for.

Recorders

Click Add Recorder, and select the recorder receiving analytic event data from the camera.

Users/Notifications

Click Add Group, and select the sales team User Group created above. Sending an email is optional. This can provide a great demonstration for them, or it might annoy them.

INTRUSION PANEL ALERTS

Optional. Can only be configured if an alarm panel (like DMP) has been configured to feed data to the recorder. Add a new rule and choose the intrusion panel option, then give the rule a name. The name will depend on what events the panel is sending to the recorder, and what alerts the sales team can best show to a customer.

- Note: OpenEye recommend creating two Alert Rules. One for just arm and disarm events that has email notifications enabled. One for all other events that does not have email notifications enabled.

Rule Definition

Define the Event Group and Event Type based on what events the panel is sending to the recorder. Add additional as needed. Define the time range and days that the alerts should be generated for.

Recorders

Click Add Recorder, and select the recorder receiving event data from the intrusion panel.

Users/Notifications

Click Add Group, and select the sales team User Group created above. Sending an email is optional. This can provide a great demonstration for them, or it might annoy them.

EDIT THE RECORDER DETAILS

Mouse over the Recorder Management menu and click Recorders, then click edit on the recorder. Enter address information for the recorder location (or enter a fake location); enter something for the Recorder ID and Location ID. Save the changes. Repeat for additional recorders if available. This adds to the detail on reports when being demonstrated by the sales team.

ADDING THE SALES TEAM

Click the settings gear in the upper-right and choose Users; then click Add New User. Add each member of the sales team, entering first name, last name, email address, and add them directly to the sales team User Group created above. OpenEye recommends also inviting the OpenEye Business Development Manager and adding to this group for training and joint calls.

ADD YOURSELF

Invite yourself using an alternate email address (like a personal Gmail, Hotmail, Yahoo, etc), and place yourself in the sales team User Group created above. Login using this alternate email address to audit the experience and access the sales team will have.

ADDITIONAL FOLLOW-UP AND FINE-TUNING

AUDIT SALES TEAM ACCEPTING INVITATION

After a reasonable time period, audit the status of the sales team accepting the invitation to the EU demo account. Login to OWS and Select the EU demo account to navigate to the EU level (blue menu bar along the top). Click the settings gear in the upper-right and choose Users.

Any user with a “Pending” note to the right, has not clicked Accept on the email invitation they received.

Click Edit on any user with a pending status. Verify that the email address displayed is correct; if it is incorrect, delete the user and re-invite. If the email is correct, click the option to re-send the activation email; then follow-up with them to insure they click Accept and create their password.

GENERATE SOME ALERTS

Two Health Alerts that are easy to generate are Recorder Not Reporting and Connection Lost to Camera. Once the sales team has all accepted their invitations, consider generating some Health Alerts for them. OpenEye recommends doing these outside of times when your sales team might be performing a demonstration to a potential customer.

RECORDER NOT REPORTING

Double-check the threshold set in the Alert Rule; the default is 4 hours. You could consider temporarily modifying to a lower threshold while generating the alert. Unplug the network connection that allows the recorder to communicate to OWS for a long enough time to meet the threshold; then reconnect.

CONNECTION LOST TO CAMERA

Double-check the threshold set in the Alert Rule; the default is 4 hours. You could consider temporarily modifying to a lower threshold while generating the alert. Unplug the network connection to a camera for a long enough time to meet the threshold; then reconnect.

AUDIT USAGE

After a reasonable time period, audit the usage of the sales team to see how often they are actually doing demos. Login to OWS and Select the EU demo account to navigate to the EU level (blue menu bar along the top). Click Reports, and view the System Summary Report; once it loads click the Overview option. Scroll down to the Usage Information section, and click on the Remote Connections graph.

By default this will load the year-to-date list showing how many times each user has connected to a system. Use the upper-left navigation to review my month, week, or day. Clicking on a user will drill into their details and display the client method, recorder, and date/time.

TRAIN THE SALES MANAGER TO AUDIT

At the EU level (blue menu bar along the top). Click the settings gear in the upper-right and choose User Groups. Create a new user group, and name it something like "Sales Managers" or "Usage Auditors."

Users

Add the Sales Manager and/or VP of Sales to the group.

Web Services Permissions

Since they should already be a member of the sales team group, this group only needs to add the User Management option to give visibility to usage statistics.

- Manage Users and User Groups

Now sit down with the Sales Manager and/or VP of Sales to show them how to audit how much their sales people are using the demo system.

ADD OPENEYE SALES ENGINEER

Your OpenEye Sales Engineer is your first technical resource in getting your OWS account spun up, ensure that it is easy for them to jump in and assist you by inviting them to your account at the CCP level. They can also assist in auditing your initial setup to insure everything is in order. Login to OWS (orange menu bar along the top). Click the settings gear in the upper-right and choose Users. Click add user, and invite your OpenEye Sales Engineer to your account, and place them in the administrator group.

OpenEye recommend keeping your OpenEye Sales Engineer on your account for the first 6-12 months after you first spin-up OWS. You can remove them from the account at any time.

- Note: Having the Remote Support Option enabled allows the OpenEye Sales Engineering team to be able to access your account without the need to add them specifically.

CREATE REPORTS FOR THE OPERATIONS/SUPPORT TEAM

Login to OWS (orange menu bar along the top). Click the Reports menu; add a System Summary and Inventory Report.

SYSTEM SUMMARY

Add a new report, and select **System Summary** report; name it something like "Health Dashboard for All Customers." The description field can be blanked out, or used to create a longer description of what the report provides.

Report Definition

All options will be selected by default, and OpenEye recommends leaving all selected.

Accounts

At the CCP level instead of choosing recorders, select which accounts will be included. Click add account, and select the option to Include all accounts in this Report, then click Add.

Health Rules

Default rule definitions are recommended; review and adjust as necessary.

User/Notifications

Click Add Group and select any of the support or operations groups you have created.

Email Reminders are optional; OpenEye recommends not sending email reminders to the support and operation teams.

Return to the main Reports menu when complete.

INVENTORY REPORT

Add a new report, and select **Inventory** report; name it something like "NVR Assets for All Customers." The description field can be blanked out, or used to create a longer description of what the report provides.

This report is a table listing all of your customers' recorders with details like serial number, MAC address, model, license, last connection time, and software version. Additionally at the CCP level this report will show when the OWS service agreement expires for each recorder.

Accounts

At the CCP level instead of choosing recorders, select which accounts will be included. Click add account, and select the option to Include all accounts in this Report, then click Add.

User/Notifications

Click Add Group and select any of the support or operations groups you have created.

Email Reminders are optional; OpenEye recommends not sending email reminders to the support and operation teams.

CREATE ALERTS FOR THE OPERATIONS/SUPPORT TEAM

Login to OWS (orange menu bar along the top). Hover over the Alerts menu and click Rules, then create a Health Alert rule to notify the support or operation teams of potential problems.

HEALTH ALERTS

Add a new rule and choose Health Alerts for the type, then give the rule a name; something like "Health Alert for All Customers." Description is optional.

Rule Definition

Default rule definitions are recommended; review and adjust as necessary. These default to the same settings as the Summary Report Health Rule Definitions, and OpenEye recommends setting these the same if they were changed in Reports.

- Note: You can consider setting the thresholds for alerts coming to your support and operation teams lower than the thresholds used to notify customers to help insure that your team knows about potential problems before the customer in most cases.

Recorders

Click Add Recorder, and select the option to automatically include all recorders in this Alert Rule.

User/Notifications

Click Add Group and select any of the support or operations groups that should be notified of potential problems.

OpenEye highly recommends enabling email notifications on Health Alerts for your support or operation teams.