

# Account Setting Management

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## Administration Guide

OneVue Sync Bluetooth

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# Manage Account Settings

## About managing account settings

Your OneVue account is unique to your organization. Account settings are located in the Admin menu and the settings configured are dependent on your OneVue solution.



### NOTE

Only a user assigned to an Admin Role can view and manage account settings. When your OneVue account was created, the primary contact provided was assigned to the account Admin Role.

## Account profile settings

- **Account name and address**

The account name is commonly the billing account name of your Primex account. The account address is for information purposes only and is commonly the billing address of your Primex account.

- **Time Synchronization: Time Zone**

The account Time Zone is time zone OneVue uses for reports, scheduled events, alert team scheduling, and the default time zone of OneVue Sync and Notify devices. All other system data is displayed in the time zone of your computer or mobile device. Optionally, a specific time zone can be assigned to a device from its profile.

- **Time Synchronization: NTP Servers (only applies to the OneVue Sync and Notify solutions)**

The account NTP Servers are the default NTP servers for Primex network devices configured to receive time from a NTP time source. Optionally, specific NTP Servers can be configured from the profile of a device.

- **Critical Notification Presets (only applies to the OneVue Notify with Critical Notifications subscription solution)**

- **Probe Replacement (only applies to OneVue Sense Temperature monitoring)**

- **Sessions: System wide user session timeout**

The account session timeout settings define the period of time a user is automatically logged out of OneVue due to inactivity. These settings are designed to enforce a system wide time period to meet your organization's information security policies.

- **Password Complexity**

The account password complexity settings define the user password controls for your OneVue users.

## Account structure (Business Units and Locations)

- **Business Units**

A Business Unit is the primary account structure component that commonly represents a department or other business entity in your organization. With the use of Business Units, you can limit and control staff access to only what they are responsible for. You can also assign a Business Unit to other system components, including Report Profiles, and Alert Rules.

Based on your organization's business rules or staff responsibilities, you may have one, a few, or many Business Units.

- **Locations**

A Location is an optional account structure component that can be assigned to devices and network profiles.

Commonly a location is used when devices are located in different time zones or in a large scale deployment that has multiple physical locations and specific staff is responsible for each unique location.

It's recommended to consult with your Primex support representative to ensure that use of locations is best for your deployment.

## User Announcements

- **User Announcements**

User Announcements are an easy way to periodically communicate important information to your OneVue users. An active User Announcement appears on the Dashboard for all users. You can set the date an announcement starts and when it ends, customize the text displayed, and insert links and images.

## Configure account name and address

The account name is commonly the billing account name of your Primex account. The account address is for information purposes only and is commonly the billing address of your Primex account.



### NOTE

Changing the account name also changes the name of the account Business Unit.

1. Go to **Admin > Edit - your account name**.
2. Update the **name** or **address** as needed.
3. Select **Save** to apply a change.

## Configure account time zone

The account Time Zone is time zone OneVue uses for reports, scheduled events, alert team scheduling, and the default time zone of OneVue Sync and Notify devices. All other system data is displayed in the time zone of your computer or mobile device. Optionally, a specific time zone can be assigned to a device from its profile.

1. Go to **Admin > Edit - your account name**.
2. From the **Time Synchronization** section, update the **Time Zone**. By default, set to the time zone of the account address zip code.

**Time Synchronization**

Time Zone:

Mesh Network Wake-Up Time UTC:  :   In Current Time Zone : 05:00 am - Central Time (US & Canada)

NTP Server 1:

NTP Server 2:

NTP Server 3:

3. Select **Save**.
- If a device's time zone is set to default, an update is downloaded to the device during its next check-in.

## Configure account NTP servers (time source)

The account NTP Servers set the default NTP Servers for Primex devices that require a time source to display synchronized time and scheduled events. The devices requiring an NTP time source include OneVue Sync and Notify devices.

When a device's NTP Server setting is set to Default, changing the account NTP Servers also updates the device's NTP Servers. The only exception is when a device is assigned to a Location, then the device's default NTP Servers are to its assigned Location's NTP Servers.

1. Go to **Admin > Edit - your account name**.
2. From the **Time Synchronization** section, enter the **NTP Server** settings.

**Time Synchronization**

Time Zone:

Mesh Network Wake-Up Time UTC:  :   In Current Time Zone : 05:00 am - Central Time (US & Canada)

NTP Server 1:

NTP Server 2:

NTP Server 3:

### NTP server guidelines

- The system default NTP servers are set to (1) 0.us.pool.ntp.org (2) 1.us.pool.ntp.org (3) 2.us.pool.ntp.org, which are external servers.
  - The use of external NTP servers requires that port 123 is open to UDP traffic to allow the Primex network devices to connect to an external server.
  - Primex recommends to set the NTP Servers to your organization's designated NTP servers and configure all three servers to ensure a reasonable level of accuracy can be maintained.
  - By default, Primex devices are set to synchronize to the NTP servers set in the account profile. Optionally, the NTP servers can be set in a device's gateway profile or location.
3. Select **Save**.

The setting change is scheduled to be downloaded to each device during its next check-in to your OneVue account and its Update Pending status is set to Yes. Once downloaded, the device's Updating Pending status is set to No.

## Configure user password complexity settings

The password complexity settings define the password control for your OneVue users. The settings include the password reuse, maximum age, maximum length, and character requirements. These settings can be set to meet your organization's password policies.

1. Go to **Admin > Edit - your account name**.
2. From the **password complexity** section, set the password settings.
  - **Enforce History:** controls how frequently a user is allowed to reuse a password. The value sets the number of times a user can reuse a previous used password. By default, set to 0 (zero) which allows reuse of previous used passwords, and can be set to 0 to 24.
  - **Maximum Age:** controls the number of days a password expires. By default, set to 0 (zero) which a password never expires, and can be set to 0 to 999 days.
  - **Minimum Length:** controls the minimum number of characters required for a password. By default set to 8 (eight) characters, and it can be set to 0 (zero) which will not require a password and is not recommended.
  - **Password must meet complexity requirements:** controls the type of characters required for a user password. When enabled, a password is required to contain a minimum of 3 (three) characters from either of the five categories listed.
3. To apply a setting change, select **Save**.

## Configure user login session timeout settings

The session timeout setting defines the period of time a user is automatically logged out of OneVue due to inactivity. By default, this setting is enabled and set to 30 minutes.

These settings are designed to enforce a system-wide user log in an expiration time period to meet your organization's information security policies.

1. Go to **Admin > Edit - your account name**. Your OneVue account profile is displayed.
2. Set the **session timeout** settings.
  - **Use Session Timeout:** when enabled, a checkmark appears, OneVue enforces a session timeout policy.
  - **Session Timeout:** number of minutes a user's login session expires due to inactivity. When reached this time period is reached, the user is automatically logged out of OneVue and required to log in to restore their OneVue session.
3. Select **Save** to apply a setting change.



## NOTE

A user can be exempt from the account session timeout by enabling the timeout exempt setting from their User Profile. When enabled, a user is never logged out of OneVue due to inactivity and the user will be required to manually log out of OneVue. Only a user assigned to an Admin Role can manage this setting.

## View, create, and edit business units

A Business Unit is the primary account structure component that commonly represents a department or other business entity in your organization. Based on your organization's business rules or staff responsibilities, you may have one, a few, or many Business Units.

With the use of Business Units, you can limit and control staff access to only what they are responsible for - each user is assigned to a Role by Business Unit. You can also assign Business Units to other system components, including reports and Alert Rules - which simplifies managing what's included in these components.

### View all business units

1. Go to **Admin > Business Units**.
2. A list of all business units is displayed. By default, the following data is provided.

Column	Definition
Name	Unique name that identifies the Business Unit and is displayed throughout the system.  Select the link, opens the Business Unit profile.
Description	For information purposes and commonly provides additional details needed to be shared with system users.
Parent BU	Parent of the Business Unit. Business units have a parent-child hierarchy structure.
Active	Indicates if active or inactive. When active, the Business Unit can be assigned to system components.
Created On	Date and time added to OneVue.

### Create a business unit

1. Go to **Admin > Business Units**.
2. From the bottom menu, select **+ New**.
3. Enter its settings.

Setting	Definition
Name	Unique name that identifies the Business Unit and is displayed throughout the system.
Description	Commonly provides additional information needed to share with system users.
Phone	Phone number of the Business Unit.  If the Business Unit is assigned to an Alert Rule, routes voice alert notifications to this phone number. The only exception is if the Dialer Suffix setting is entered.
Dialer Suffix	Setting does not apply to the Sync Bluetooth or PoE solution.  OneVue provides the ability to route voice alert notifications to an IVR system. You will commonly configure this setting when your organization's phone system requires that callers enter an extension number or select an option to reach a specific person, department, or central line.  Allows up to a maximum of 12 numbers/characters.  <ul style="list-style-type: none"> <li>• Numbers: 0 through 9</li> <li>• Comma: ,</li> <li>• Period: .</li> <li>• Number sign/pound key: #</li> <li>• Asterisk/star: *</li> <li>• w (letter): when w is included, there is a 0.5 second pause</li> </ul>
Parent	Parent of the Business Unit. Business units have a parent-child hierarchy structure.  By default, assigned to the account Business Unit.
Is Active	Indicates if active or inactive. When active, the Business Unit can be assigned to system components.

### Deactivate a business unit

Deactivating a Business Unit removes its ability to be assigned to system components. Once deactivated, all data is retained in historical reports and it can then be deleted.



#### NOTE

Can only be deactivated if it is not assigned to any system components.

1. Go to **Admin > Business Units**.
2. From the list, select the **Name link** of the Business Unit. Its profile is displayed.
3. From the **Is Active** setting, deselect the checkbox.



4. Select **Save**.

Business Unit is deactivated and its active status is set to false. If required, it can now be deleted.

### Delete a business unit

Deleting a Business Unit permanently deletes it from your OneVue account. To delete, it must be deactivated. Once deleted all data is retained in historical reports.

1. Go to **Admin > Business Units**.
2. From the list, select the **Name link** of the Business Unit. Its profile is displayed.
3. From the bottom menu, select **Delete**.

### View, create, and edit locations

A Location is an optional account structure component that can be assigned to devices and network profiles. Commonly a Location is used when devices are located in different time zones or in a large scale deployment that has multiple physical Locations and specific staff is responsible for each unique Location.

It's recommended to consult with your Primex representative to ensure that the use of Locations is best for your deployment.

### View all locations

1. Go to **Admin > Locations**.
2. A list of all locations is displayed. By default, the following data is provided.

Column	Definition
Name	Unique name that identifies the Location and is displayed throughout the system.
Short name	Secondary name to uniquely identify the Location.
Parent	Parent of the Location. Locations have a parent-child hierarchy structure.
Description	Information added by a user that is commonly needed to be shared with other system users.
Active	Indicates if active or inactive. When active, the Location can be assigned to devices and network profiles.

### Create a location

1. Go to **Admin > Locations**.
2. From the bottom menu, select **+ New**.
3. Enter its settings.

Setting	Definition
Name	Unique name that identifies the Location and is displayed throughout the system.

Setting	Definition
Parent	Parent of the Location. Locations have a parent-child hierarchy structure.
Short Name	Secondary name to uniquely identify the Location.
Description	For information purposes and commonly provides information needed to share with system users.
Address settings	For information purposes only.  Not associated to your Primex billing or ship to addresses.
Time Zone	Time zone of the Location. When a device is assigned to a Location, its default time zone is set to its assigned Location time zone and all events are generated based on this time zone.
NTP Server (1-3)	When a device is assigned to a Location, its default NTP Servers are set to its assigned Location NTP Servers.
Is Active	Indicates if active or inactive. When active, the Location can be assigned to devices and network profiles.

4. Select **Save**.

The Location can be assigned to devices and network profiles.

### Deactivate a location

Deactivating a Location removes its ability to be assigned to devices and network profiles. Once deactivated, all data is retained in historical reports and it can then be deleted.



#### NOTE

Can only be deactivated if not assigned to any devices or network profiles.

1. Go to **Admin > Locations**.
2. From the list, select the **Name link** of the Location. Its profile is displayed.
3. From the **Is Active** setting, deselect the checkbox.
4. Select **Save**.  
Location is deactivated and its active status is set to false. If required, it can now be deleted.

### Delete a location

Deleting a Location permanently deletes it from your OneVue account. To delete, it must be deactivated. Once deleted, all data is retained in historical reports.

1. Go to **Admin > Locations**.

2. From the list, select the **Name link** of the Location. Its profile is displayed.
3. From the bottom menu, select **Delete**.

## View, create, and edit user announcements

User Announcements are an easy way to periodically communicate important information to your OneVue users. An active User Announcement appears on the Dashboard for all users. You can set the date an announcement starts and when it ends, customize the text displayed, and insert links and images.

Primex also leverages User Announcements to share important information regarding our OneVue platform and Primex devices. A common type of Primex announcement is a notification that an update to OneVue or Primex devices will be released on a specified date.

Managing User Announcements is limited to users assigned to the Account Admin or Network Admin role. All users have access to view active announcements from their Dashboard.

### View all user announcements

1. Go to **Admin > User Announcements**.
2. The list of User Announcements is displayed.

Column	Definition
Subject	Text that uniquely describes the announcement.
Starts On	Date the announcement starts and appears on each user's Dashboard.
Ends at Midnight	Date the announcement ends at midnight (at the end of the day) and is removed from each user's Dashboard.

### Create a new user announcement

1. Go to **Admin > User Announcement**.
2. Select **+ New**.
3. Enter the settings.

**New Announcement**

Subject \*

Text to Display \*

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Starts On \*

Ends at Midnight \*

Setting	Definition
Subject	Text that uniquely describes the announcement. For reference use only and does not appear in the announcement.
Text to Display	<p>Information displayed in the announcement. From the content editor toolbar, you can format the text and insert a link or image.</p> <ul style="list-style-type: none"> <li>• <b>Insert Link:</b> insert a URL link into an announcement. When a user selects the link, the URL link opens in a new window. As an example, enter the address of a website or a URL internal your organization.</li> </ul> <p>From the text editor toolbar, select the insert link icon. From the Insert Link window, enter the link settings.</p> <ul style="list-style-type: none"> <li>• <b>URL:</b> paste the URL link into the field.</li> <li>• <b>Text to display:</b> enter the link text to be displayed. When a user selects the text from the announcement, the URL opens in a new window.</li> <li>• <b>Title:</b> displayed when a user hovers over the link text.</li> <li>• <b>Target:</b> when the link is selected, the link opens in a New Window.</li> <li>• <b>Insert Image:</b> Insert an Image URL into the announcement. The image is displayed in the announcement.</li> </ul> <p>From the text editor toolbar, select the insert Image icon.</p> <ul style="list-style-type: none"> <li>• <b>Source:</b> paste the image URL or enter the image URL.</li> <li>• <b>Image description:</b> displayed when a user hovers over the link text.</li> <li>• <b>Dimensions:</b> set the size of the image.</li> </ul>

Setting	Definition
Starts On	<p>Date the announcement starts and appears on each user's Dashboard.</p> <ul style="list-style-type: none"> <li>• If the start date is the current date, the announcement appears on the Dashboard at the time the announcement is saved.</li> <li>• If the date occurs in the future, the system automatically displays the announcement on the Dashboard at 12:00 AM (at the beginning of the day) of the date selected.</li> </ul>
Ends at Midnight	<p>Date the announcement is removed from the Dashboard at midnight (at the end of the day) of the date selected.</p>

4. Once all settings are entered, select Save. The announcement has been saved and will be displayed on the Dashboard to all system users during the specified date range.

### [Edit or delete a user announcement](#)

An existing announcement can be edited or deleted. If a user has closed the announcement from their Dashboard, an edited announcement does not reappear on their Dashboard.

Deleting an announcement permanently removes the announcement from your OneVue account.

1. Go to **Admin > User Announcements**.
2. From the list, select the announcement **Subject link**.
3. Edit the announcement or select Delete.
4. Select **Save**.

If an active announcement, the update is displayed on the Dashboard. If deleted, it's removed from the Dashboard.

## Technical Support

You may require Technical Support when you have questions about product features, system configuration, or troubleshooting. Support services are delivered in accordance with your organization's support agreement, end-user license agreements, and warranties, either with a Primex Certified Sales and Service Partner or directly with Primex.

### Support through Primex Certified Sales and Service Partners

Ensuring our customers experience excellent service is of utmost importance to Primex. Our network of Certified Sales and Service Partners offers technical support services for Primex products.

If you have purchased Primex products or have a service agreement with a Primex Partner, they are your primary contact for all Technical Support inquiries.

### Primex Technical Support

Make sure you have satisfied the system requirements that are listed in your product documentation. Also, you should be at the computer or device on which the problem occurred, in case it's necessary to replicate the problem.

When you contact Primex Technical Support, please have the following information available:

- Customer ID/Account Name
- Problem description/error messages
- Device hardware information
- Troubleshooting performed before contacting Primex
- Recent network changes

#### **PRIMEX TECHNICAL SUPPORT**

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