

SmartView
User and Administrator Guide

Version 6.8

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Table of Contents

Overview **7**

Basic Configuration **9**

Getting Started with the SmartView **10**

Sign In 10

Failed Login Attempts 11

Forgot Password 11

Sign Out 12

Common Elements in SmartView 12

Landing page 12

Session Timeout 16

Main Menu 17

Icons 17

Graphs 19

Statistics 30

Maps 31

Alarms 31

Alarm Notifications 32

Audit Trail 36

User Profile 37

Monitoring **38**

Dashboard 38

Locations Section 38

Active Sector Alarms Section 39

Shipments Section 39

Active Shipment Alarms Section 40

Locations 41

About Location Geofence 41

About Location Sectors 41

Location and Sector Notifications 42

Location List 42

Location Page 43

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Create Location 48
Modify Location 50
Enable/Disable Location 51
Location Sectors 51

Shipments 69
Shipment List 69
Shipment Page 70
Create Shipment 86
Modify Shipment 91
Shipment Milestones 92

Goods (New) 92

TCIs (Legacy) 95
TCI List 96
TCI Page 97

Devices 105
Device List 105
Device Page 106
Changing Device Sublicense 112

Maps 114

File Upload 114

Shipment Dashboard 117

Dashboard Details 118

Alarm Statistics 119

Device Usage 120

Reporting 122

Standard Reports 122
Trade Lane Report 122
Location Report 125
Alarms 128
Manual Alarms 133
Review 134
Audit Trail 136

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Custom Graph 138
Shipment analysis 142

Additional Reporting Capabilities 145

Configuration 147

Configuration Policy 147
Create New Configuration Policy 147

Carriers 152

Customers 153
Customer List 153
Customer Page 153
Create Customer 154
Modify Customer 154
Enable/Disable Customer 154

Alarm Profiles 154
Alarm Profile List 155
Alarm Profile Page 155
Create Alarm Profile 157
Modify Alarm Profile 158
Delete Alarm Profile 158

Packing Systems 159
Packing System Page 159
Create Packing System 160
Modify Packing System 161
Delete Packing System 161

Products (Legacy) 161
Product List 161
Product Page 162
Create Product 165
Modify Product 165
Delete Product 165

Clinical Trials (Legacy) 165

Administration 168

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User Management....168
User List....168
User Page....169
Create New User....171
Modify User....172

Password Policy....173

Access Control....173
Duplicate Role....177
Modify Role....177
View Assigned Users....177
Create New License....178

Login Policy....180

License Settings....180
General Tab....181
Range Settings....181
Storage Conditions....183
Root Causes....185
Email Recipient....187
API....188

Monitoring Types....189
Monitoring Types List....189
Monitoring Type Page....189
Create Monitoring Type....190
Modify Monitoring Type....192

Supported Devices....193

SmartMonitor Family....193

Wireless RFID Sensors....193

Q-tag CLm doc Family....193

Fridge-tag Family....193

TempTale Ultra Family....194

Glossary....195

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Overview

SmartView is a temperature monitoring solution that can help you improve daily workflows in terms of quality, safety, and workload.

End-to-end monitoring for effective decision-making

Multiple condition data provided to the right stakeholders in real-time enable delivering mission-critical supply chain insights, ensuring quality, and reducing wastage and costs. Supply chain risks and disruptions as well as quality reviews become predictable with the analytics of the SmartSystem.

Supply Chain Visibility



Digitization of the supply chain and integration optimize efficiency

With wireless connectivity and all real-time data accessible in our cloud platform, the digitization and scalability of your processes have never been easier. Take advantage of the application programming interface (API) to integrate your TMS, ERP, IRT, or 3rd party device to experience the full power of control.

Compatibility & Integration



Reduce real-time costs with intercommunication

Thanks to our modular hardware lineup with intelligent intercommunication, you can reduce the costs of real-time monitoring in an easy way.

Modularity

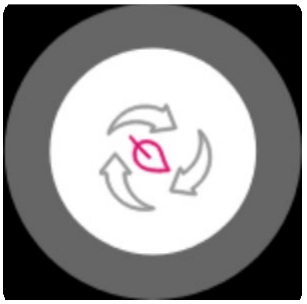


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Minimize the environmental impact and achieve your sustainability goals

With SmartSystem, you can reduce risks and increase your environmental footprint in the most efficient way. This is by improving your processes, reducing waste, and decreasing the use of raw materials with smart re-use hardware.

Sustainability



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Basic Configuration

Prior to using a SmartMonitor device, it is required to define:

1. Configuration policy:

   - Configures sensors and suitable temperatures ranges
   - Configures the means of communication (Mobile, WIFI, Bluetooth, etc.)
   - Configures alarm limits

   The configuration policy is typically defined directly by the QA department.

2. Alarm profile:

   - Determines which configuration policy applies
   - Configures who receives alarm notifications, when and how

3. Create Location
4. Create Sector

Whenever alarm profiles are assigned to shipments or sectors, every linked device will receive the specified configuration policy.

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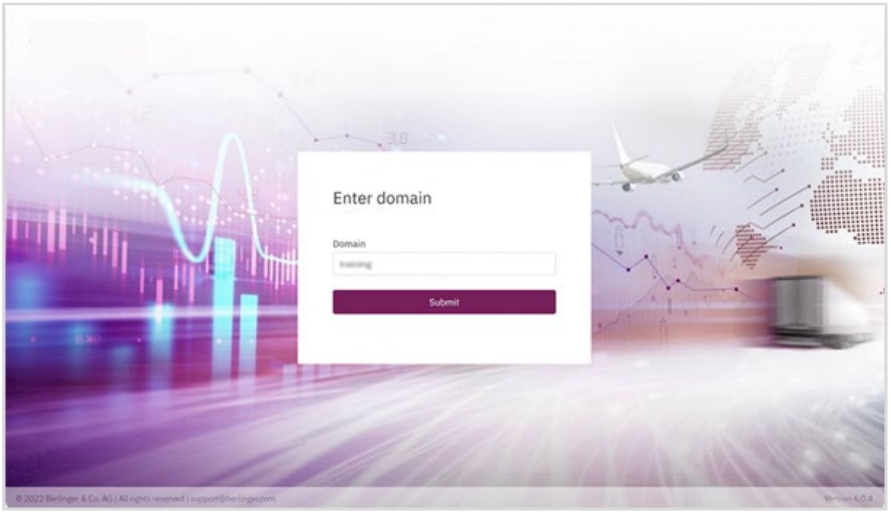
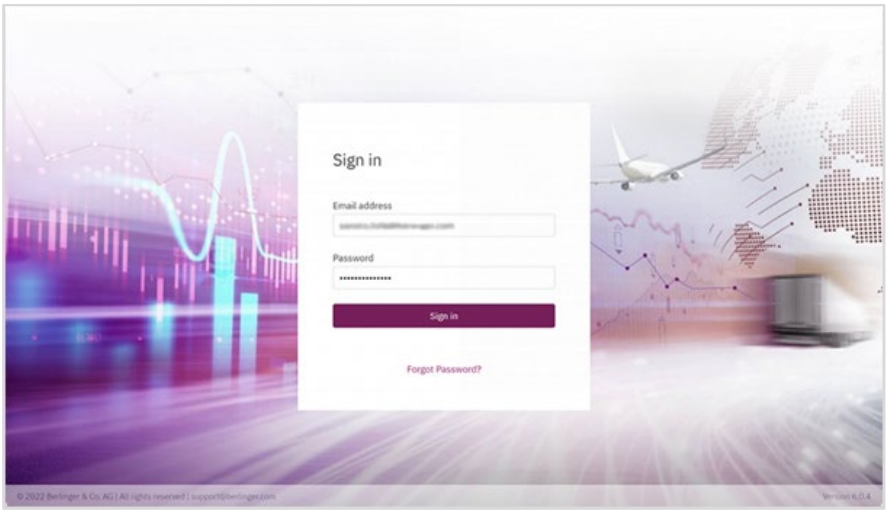
Getting Started with the SmartView

This section describes the following functionality:

- Sign in
- Failed Login Attempts
- Forgot Password
- Landing Page
- Sign Out

Sign In

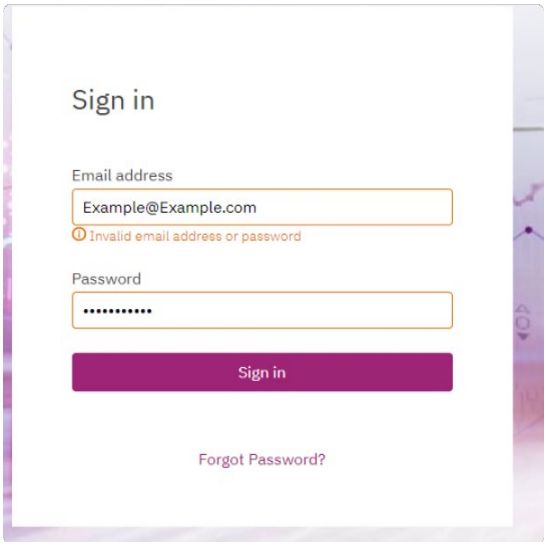
To access the SmartView web application please start your web browser and enter the URL. You will be redirected to the User Sign-in page of SmartView.

To sign in, enter the appropriate domain (personalized for your company), your email address, and password to the according fields and press the **Sign in** button.	
	

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Failed Login Attempts

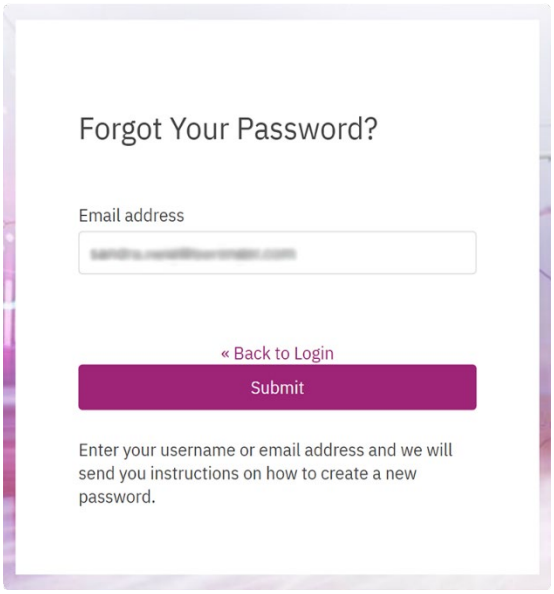
A certain amount of failed log in attempts can lead to your account being blocked depending on the selected setting of the administrator Login Policy. This state is not indicated within the log-in screen and if this is suspected it is recommended to reach out to an administrator within your organization.



Forgot Password

1. On the login screen, click on the **Forgot password?** link which will take you to the **Forgot Your Password?** screen as shown in the following image:
2. Click **Submit** to recover your password again.

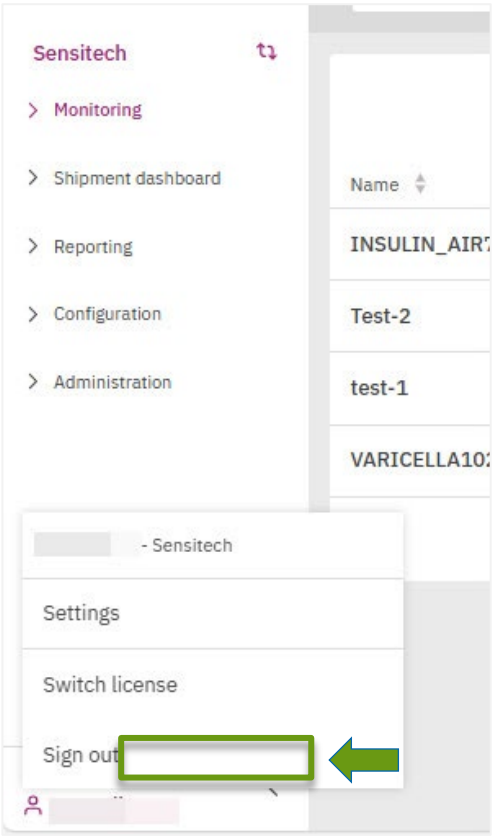
You can recover your password with your email and domain (optional) in case you forgot your password. A reset link valid for 48 hours will be sent to your email address.



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Sign Out

To log out of SmartView, click on your username at the bottom left and select **Sign Out**.



Common Elements in SmartView

This chapter includes the following content:

- Landing Page
- Main Menu
- Icons
- Settings
- Graphs
- Statistics
- Audit Trail
- User Profile

Landing page

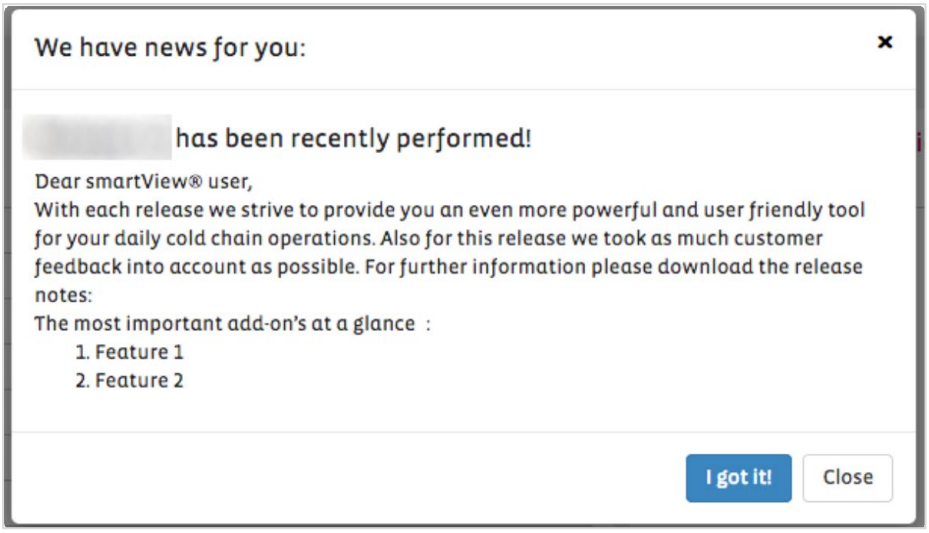
A landing page for the sign in can be set by pressing the star ☆ next to the title.



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Information Window

Besides email information, the SmartView user will be informed with a pop-up window after successful login about new releases and other important information.



Click **I got it**. The window will disappear and not come again when you log in again.

Note that if you exit the window without selecting **I got it**, the window will close and the information will be presented again upon your next login.

Licenses and Sublicenses

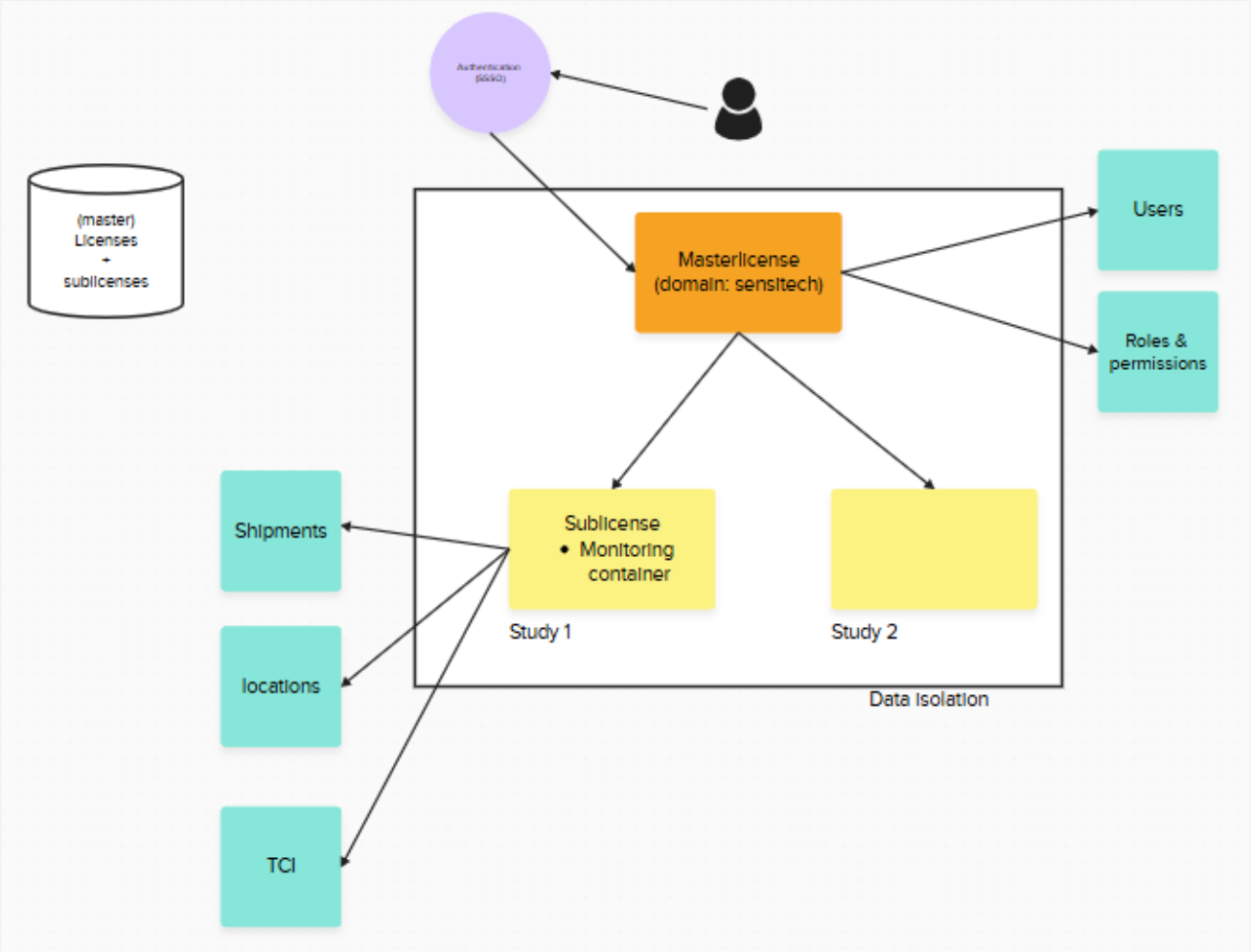
When you log in, you are automatically logged in to your Master license (a license created for your company).

A Master license must have at least one sublicenses. An example of a Master license is Sensitech and a sublicense can be Study 1 (Monitoring Container).

Users are assigned to sublicenses, which have a set of roles. Within a sublicense, aa user's is assigned to a role which has permissions and restrictions.

A user may be assigned to more than one license and more than one role. In that case, a user can switch from one license to another one without having to log out and log back in. Refer to

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User assignment is done by License Administrator (a user with admin privileges for your company).

After signing in the screen will show the available sublicenses.

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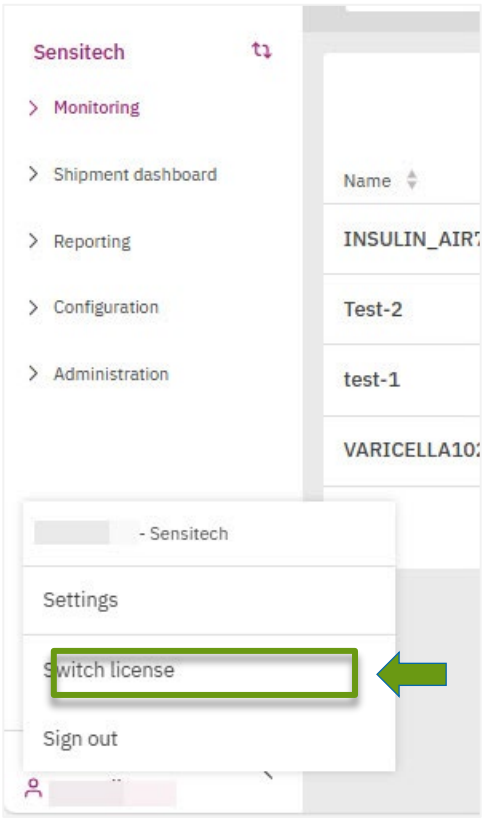


If you are assigned to multiple licenses and you need to switch your sublicense, complete the following steps:

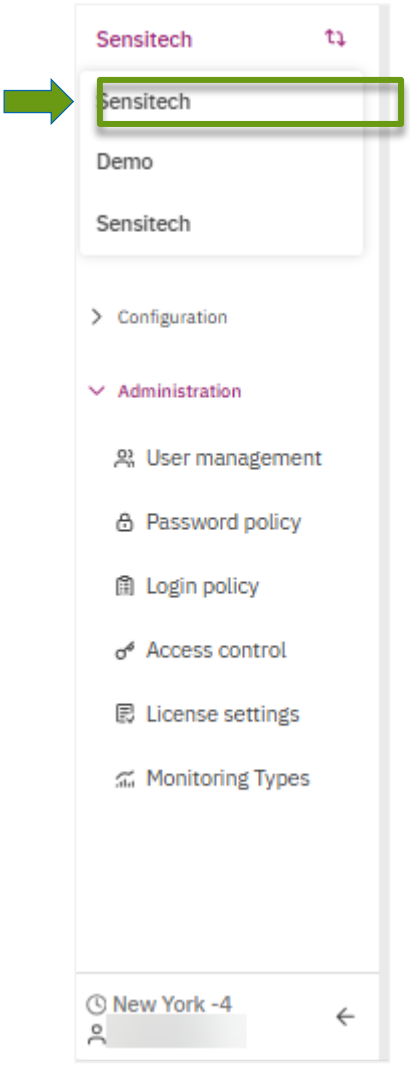
1. Click your username at the bottom left.

   Your user's name and your current Sublicense appears on the pop-up's top.

2. Select **Switch license** to return to the license selection screen.



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Additionally, you can change your license using the drop-down menu at the top left of the screen.	

Session Timeout

Users will be automatically logged out of the system after 25 minutes of inactivity.

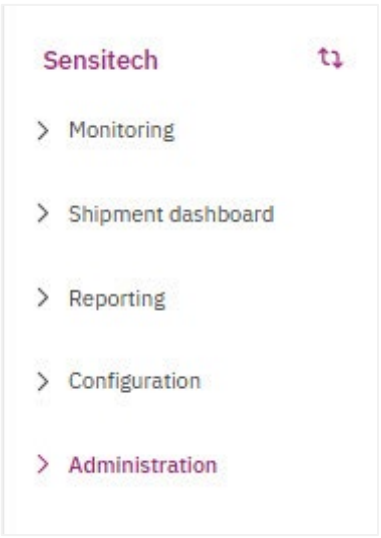
Note: If you are accessing SmartView via a different URL, it can be that the domain field will not be visible due to the automatic detection by SmartView based on a visited URL.

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Main Menu

After signing in, the following main menu items are available to a user.

Some menu options are hidden based on user permissions. Users can expand each menu item to view sub-items.

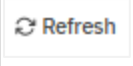
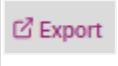


Icons

This section describes icons.

Common Icons

There are a number of clickable icons to be identified in SmartView:

Icon	Description
	Action Menu icon
	View more info icon
	Save as a favorite
	Settings
	CSV file
	Enable / Disable Columns in the list
	Refresh the list
	Export the list of selected items.

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The following icons represent the major entities in the SmartView application:

Location Icons

Icon	Meaning	Description
	Not monitored	Location is not being monitored
	Online	Network at Location is online, which means that data is currently being received in SmartView.
	Offline	Network at Location is offline, which means no data is received for at least one hour.

Sector Icons

Icon	Meaning	Description
	Not monitored	Sector has no active associations.
	Online	Network at sector is online, which means that data is currently being received in SmartView.
	Offline	Network at sector is offline, which means no data is received for at least one hour.
	No Monitoring	Sector currently has alarm monitoring enable.
	OK	Sector currently has no active excursion or warning.
	Warning	Sector has an active warning, but no excursion.
	Excursion	Sector has at least an active excursion.

Shipment Icons

Icon	Meaning	Description
	Idle	Newly created shipments
	Pending	Shipments with associations waiting for data

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	Active	Shipments with (partial data)
	Completed	Shipments with all data accounted for
	Expired	Shipments that did not send in all data in time
	Approved	Manually approved shipment
	Declined	Manually declined shipments
	Archived	Manually archived shipments

Alarm State Icons

Icon	Meaning	Description
	Active Alarm	The sensor value is currently in alert state.
	Stopped Alarm	The sensor value has returned to the allowed range.

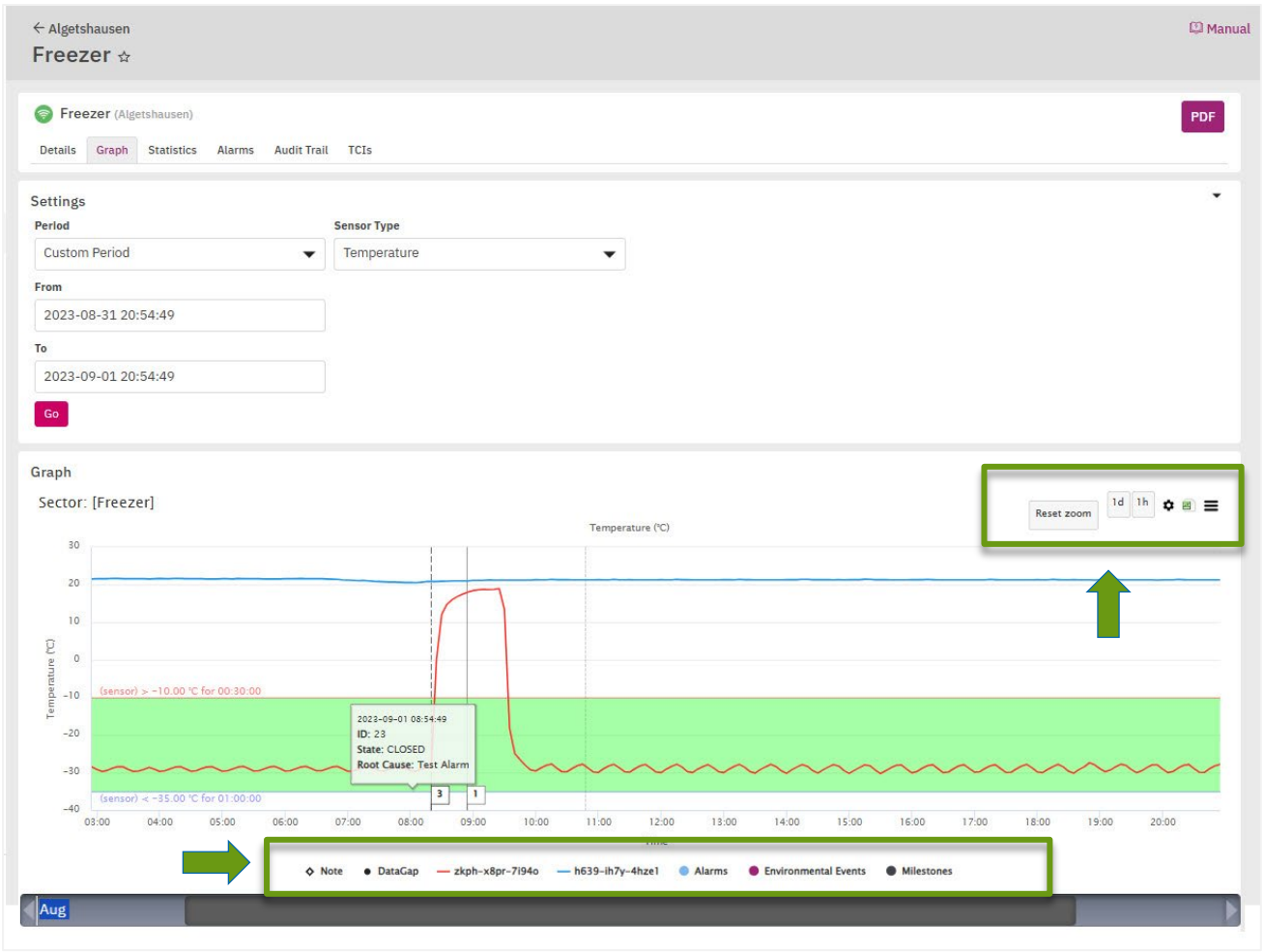
Alarm User State Icons

Icon	Meaning	Description
	Open Alarm	The alarm has not been acknowledged yet by user.
	Acknowledged Alarm	The alarm has been acknowledged by user.
	Closed Alarm	The alarm has been closed by user.

Graphs

SmartView offers possibilities to present captured data in graphs. The following is an example of a graph for a sector monitoring within a location:

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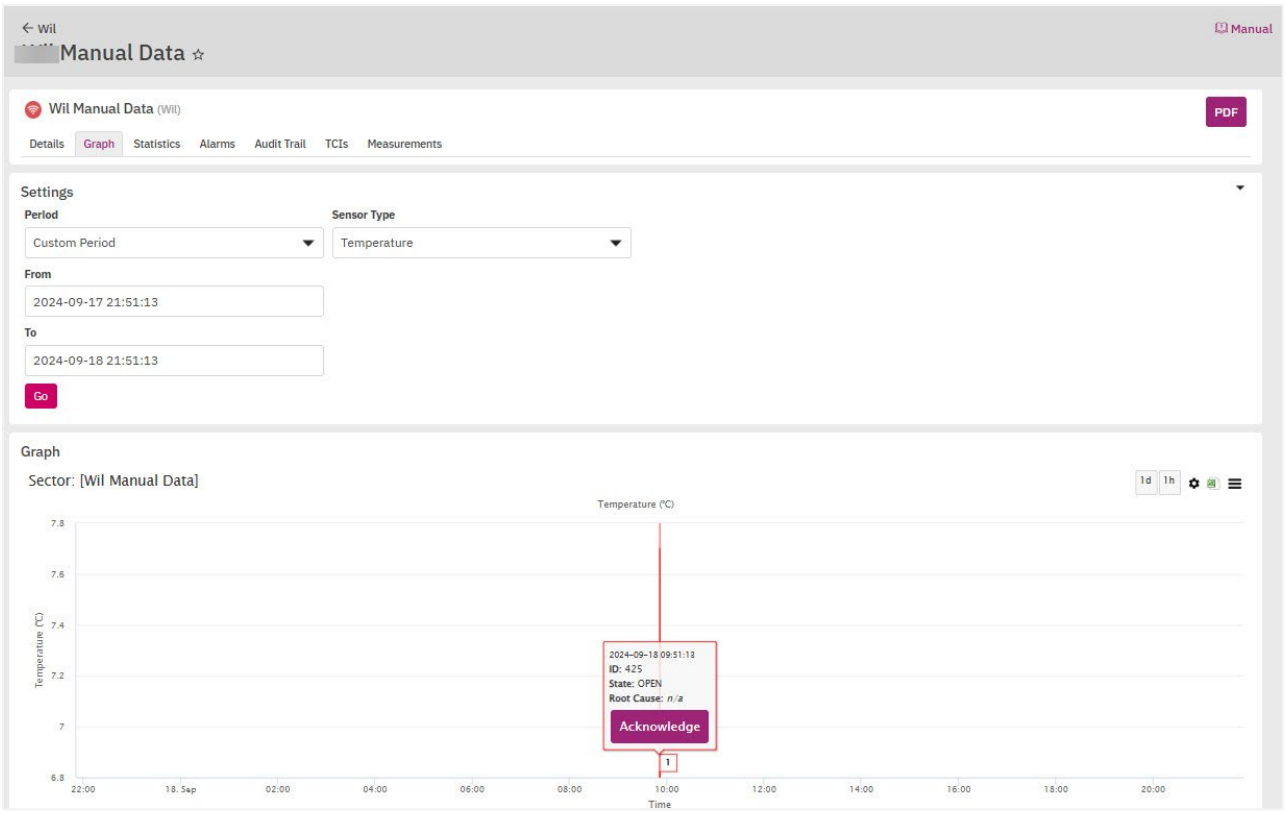
1: Graph View

Refer to *Locations* and *Shipments* sections to learn more about how to view graphs in location sectors and shipments.

Alarm Graph Markers

Additional markers on the sector/shipment graph, similar to milestone markers, represent shipment alarms. A dashed vertical line in red, yellow, or gray (based on excursion state) is shown, along with a clickable box displaying the alarm ID that links to it the detail page.

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2: Location Sector Graph with Alarm

The markers are colored according to the status of the alarm:

- Red – indicating open alarms.
- Yellow – indicating acknowledged alarms.
- Gray – indicating closed alarms.

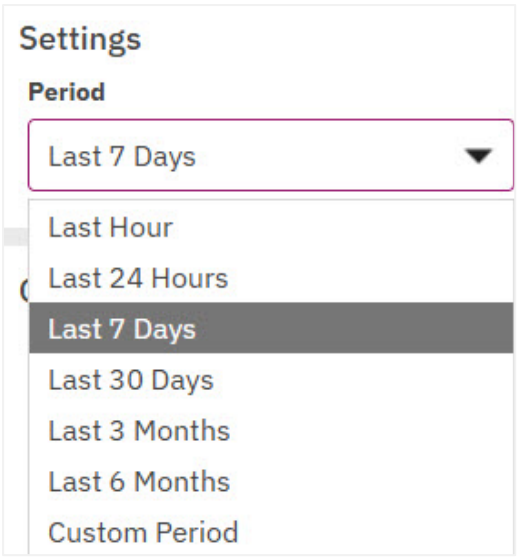
Graph Settings

This section describes various graph settings.

Time Period

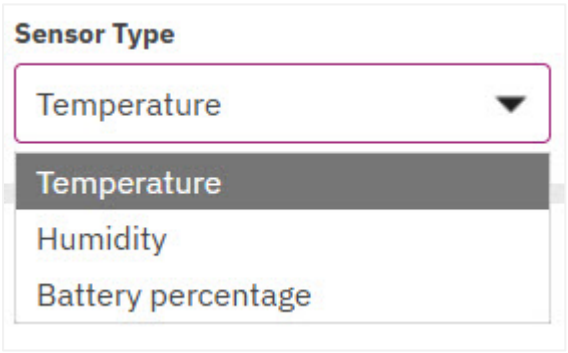
Choose the time period which should be displayed

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Sensor Type

Choose the type of sensor which should be shown on the graph if available



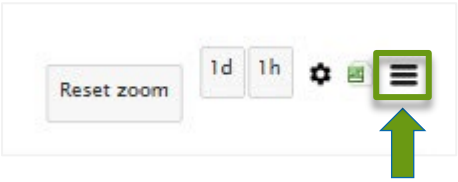
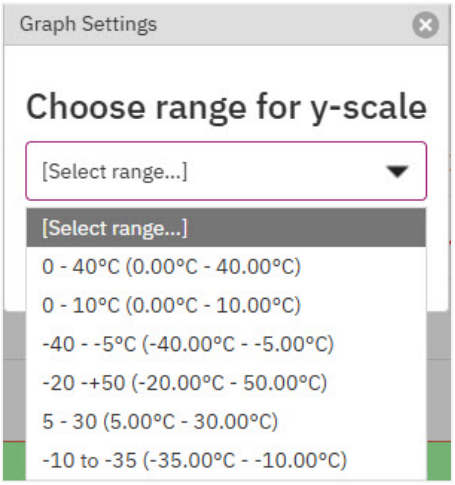
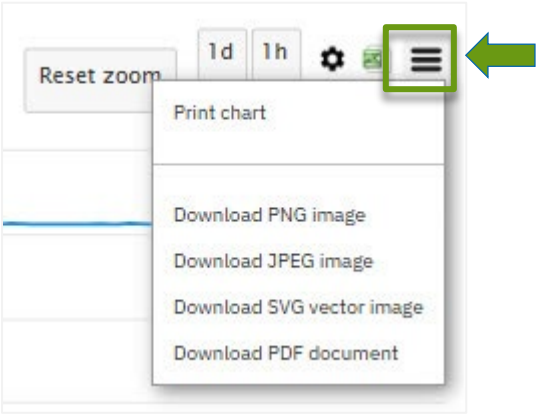
Graph Controls

This section describes graph controls.

Table 1: Graph Controls

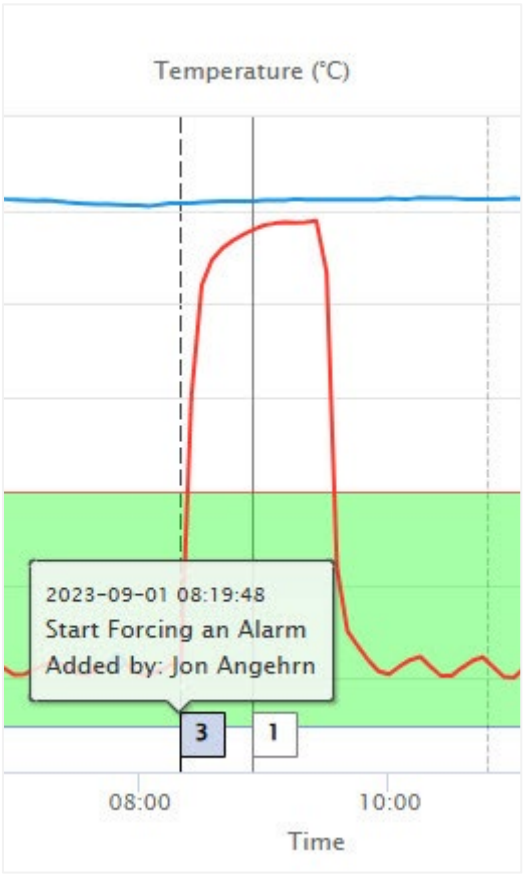
1. The controls at the bottom of the graph allows user to add and remove the following from the graph view:
• Note – to view notes on the graph • DataGap – time when a device is not taking measurements, for example, when a device is being connected to a computer. • Specific sensors – list of serial numbers that represent a device or a sensor • Alarms • Environmental Events (Shock, Tilt, Freefall, Light) • Milestones

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Click on the option to select and deselect it from the graph view.	
2. The top-right control options for the graph allow you to do the following:	
Select the icon to export graph in CSV file.	
Click the icon to view **Graph Settings**. From Graph Settings select the graph range for y-scale you wish to view on your graph.	
Click on the Action Menu and then select to download a graph as an image in one of the following formats: • PNG • JPEG • SVG Or download a graph as a PDF.	

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3. Choose (mark) x-scale of graph view:
   - 1 = alarm marker,
   - 3 = milestone marker



4. Graph Slider

   While viewing the graph, a user can also use graph slider to view specific time frame of the graph:

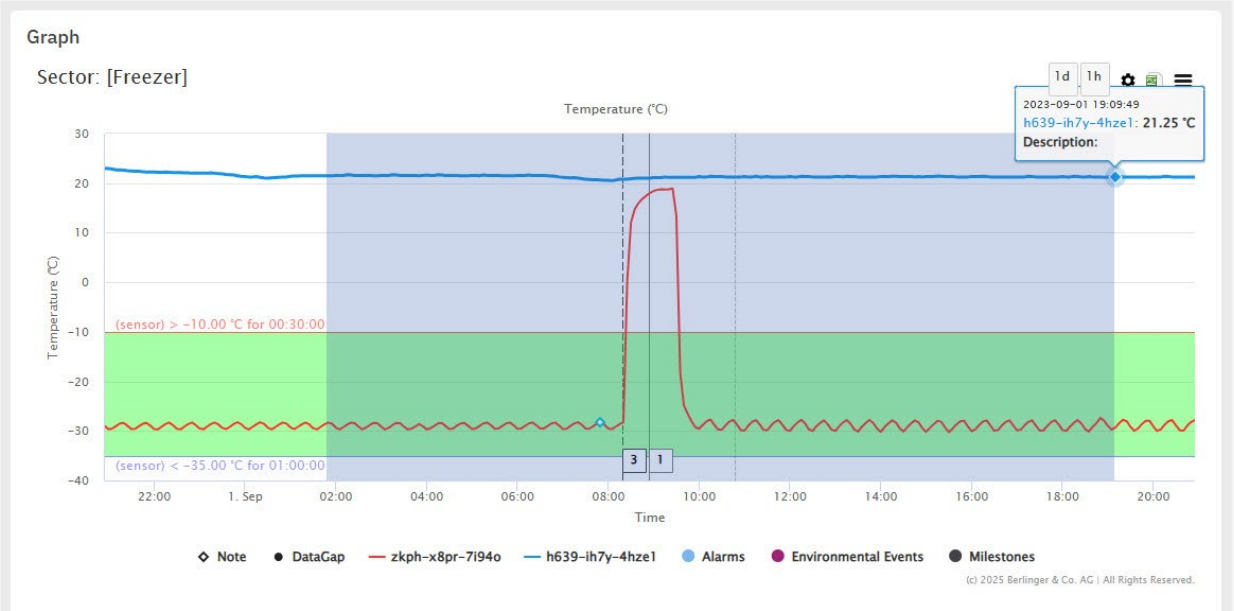


Graph Zoom

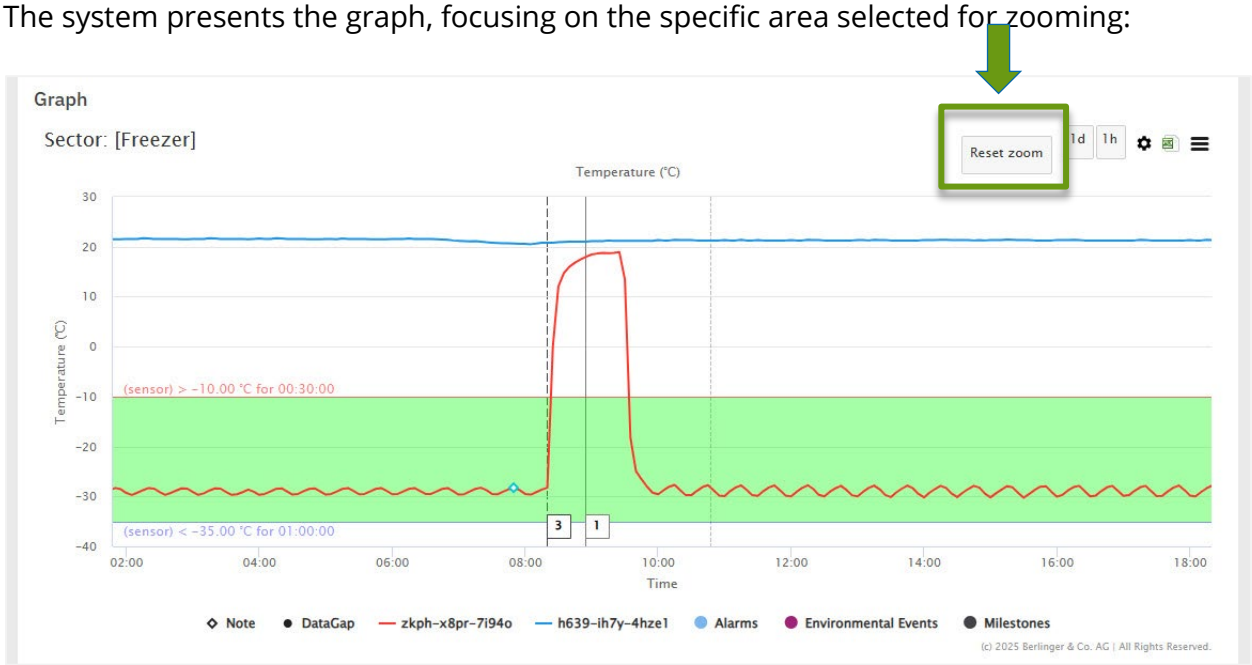
User can zoom on a specific area on the graph. The following steps describe how to do this:

1. Select the graph by pressing and holding the left mouse button, then drag along the x-axis. Release the mouse button to complete the action.

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The system presents the graph, focusing on the specific area selected for zooming:



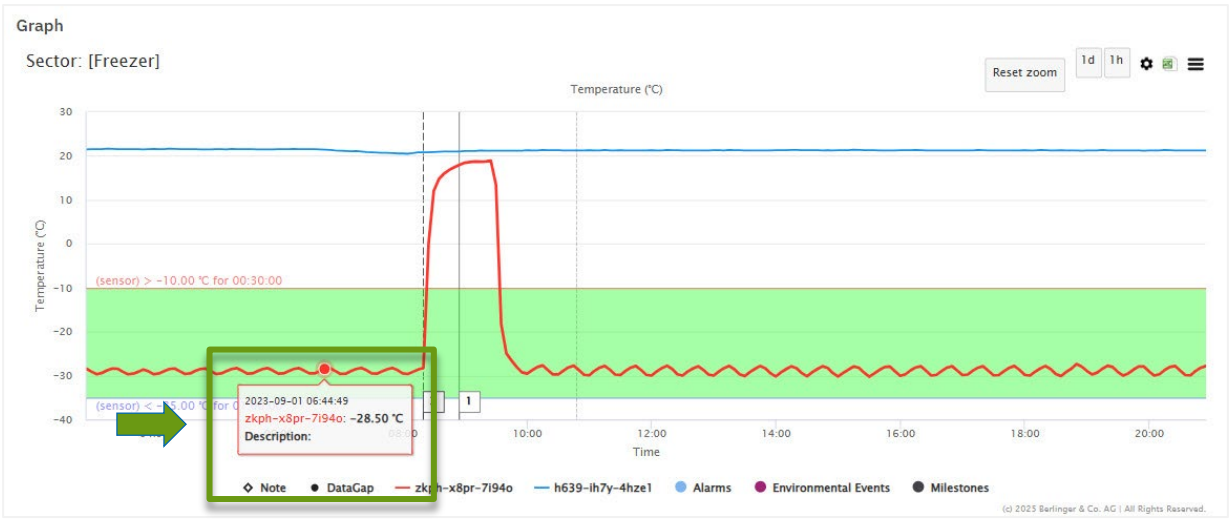
2. To reset the graph to the original state, click **Reset**.

Graph Note

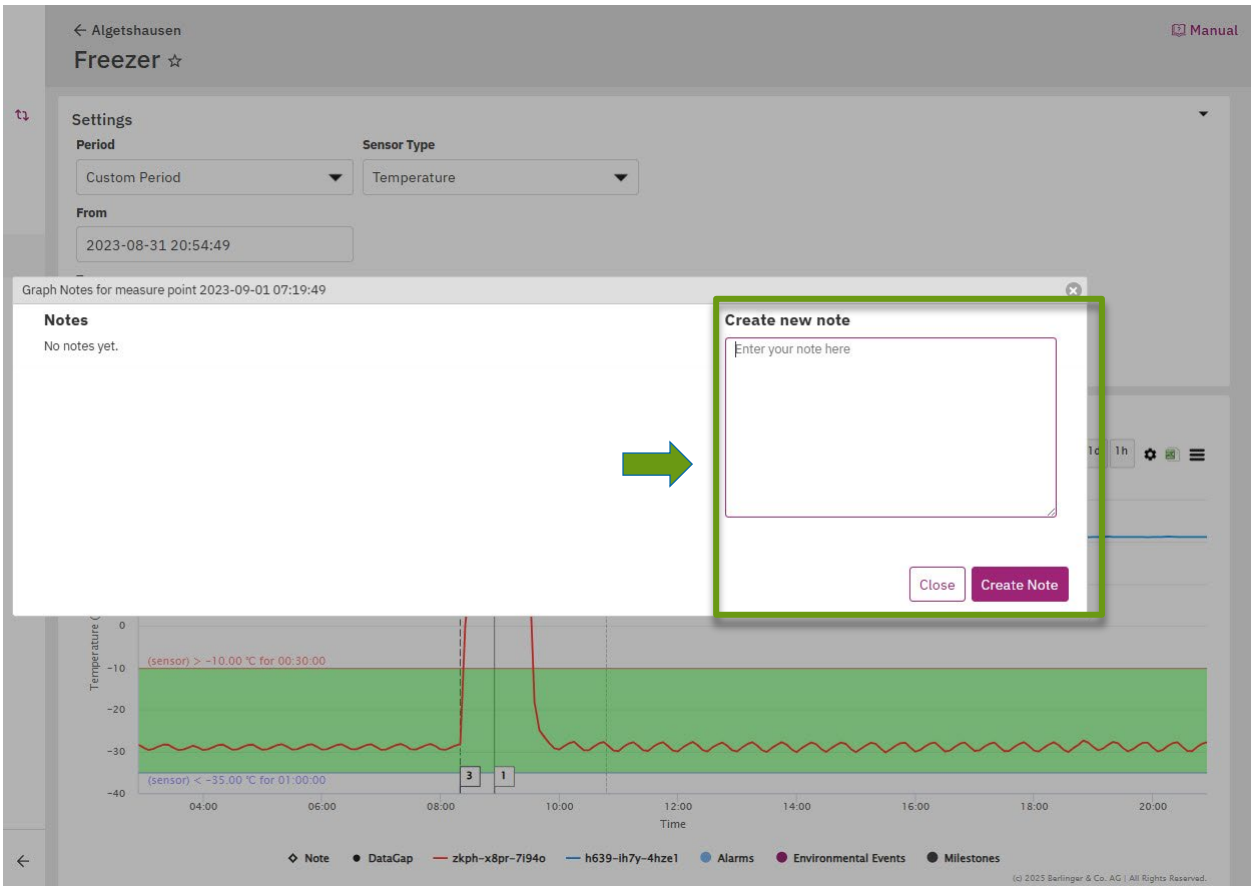
Users can add a note to a graph. To do this, follow the steps:

1. Click the area on the graph where you want to add a note.

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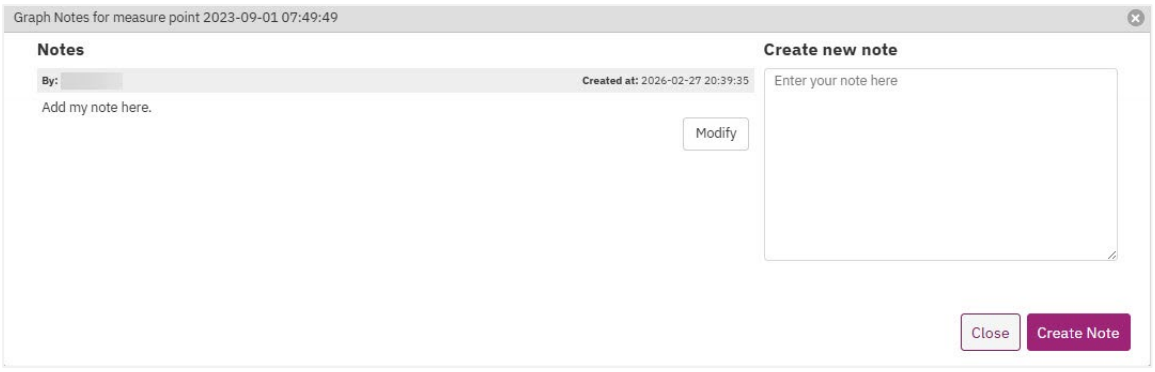
The system opens a pop-up window for your notes:



2. Add your note and then click **Create Note**.

   The Systems adds your note and records the user's name and the date the note was added.

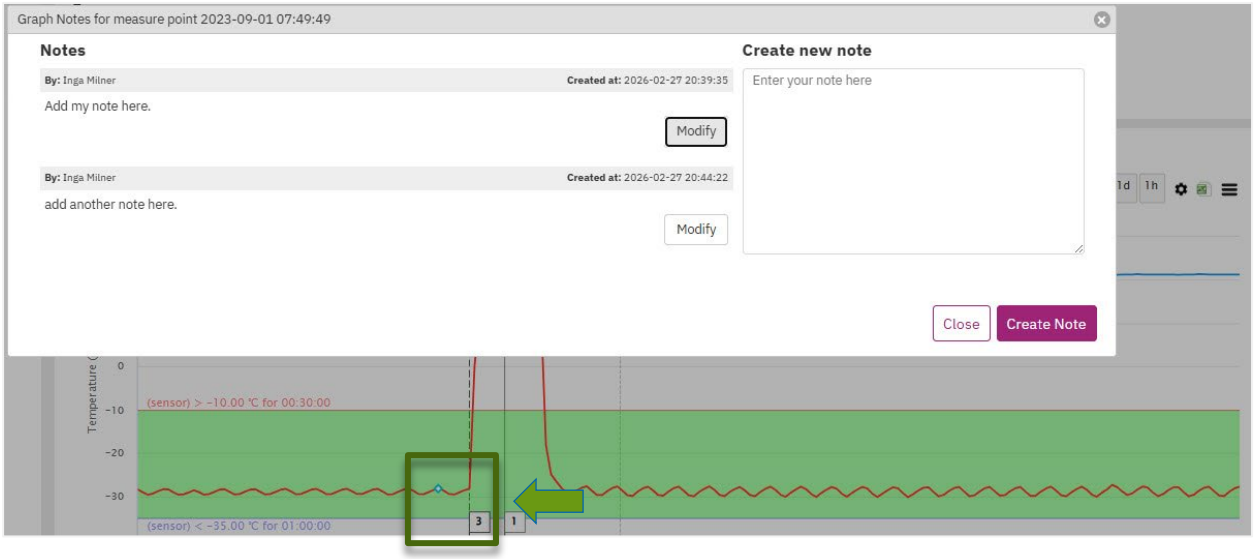
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You can modify the note that you added and add another note by clicking on **Create Note**.

3. Click **Close** when you have completed adding notes.

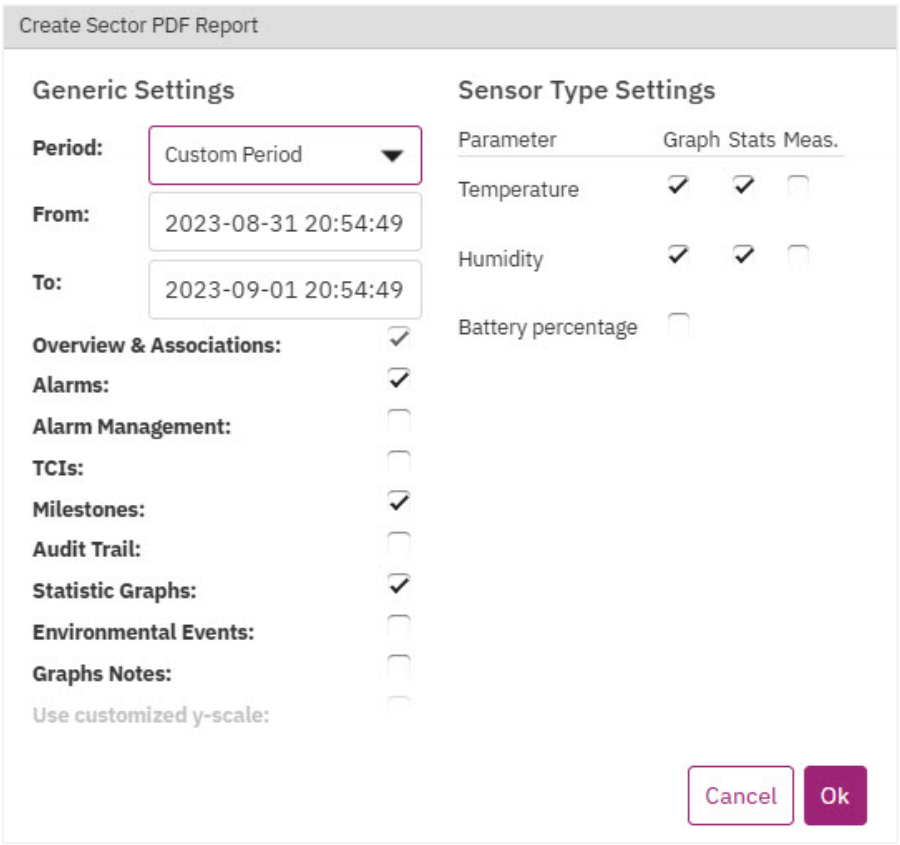
   The system attaches notes to the marked data point and highlights it on the graph to show that notes are available for this point.



Graph PDF

To export a graph as a PDF, click **PDF** in the top-right corner of the graph view, choose your report options, and click **OK**.

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You can print and save the exported PDF report, which looks like the following:

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Ask Copilot — 1 of 4

Showroom-4029

Sector Report: Freezer

(From: 28 Jan 2026 19:00 - To: 27 Feb 2026 19:00)

Overview

Sector:		Timezone:	Europe/Zurich
Location:		No. Devices:	02
Street:		Metrics:	Temperature, Humidity, Battery percentage, GPS Coordinate
Postal Code, City:		Storage Conditions:	Freezer (-25°C - -10°C)
Province:			
Country:	Switzerland		
Description:	-26?C Freezer		

Associations (2)

Device	Association Details	Start	Stop
peza-ogya-s9jkh	In Freezer	2025-03-11 16:42:09	n/a
zkph-x8pr-7i94o	No description provided	2025-03-11 16:42:05	n/a

Replaceable Sensor Associations (1)

Device ID	Sensor ID	Start	Stop
peza-ogya-s9jkh	zkph-x8pr-7i94o	2025-03-11 16:42:05	n/a

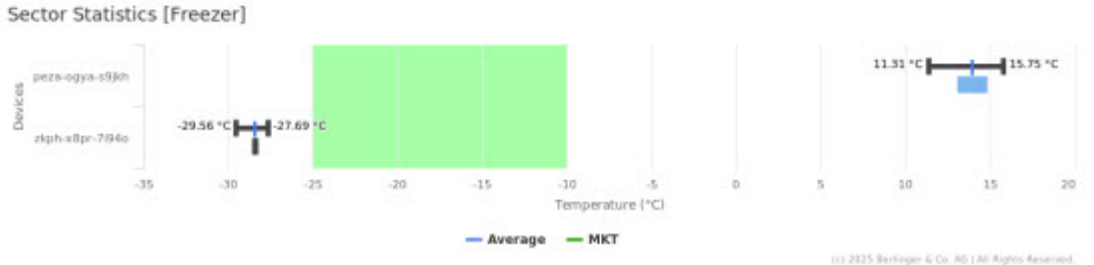
Statistical Analysis (Temperature)

Alarm Time

Device	Association Duration	Time (%) In Range	Time (%) Out of Range	Time (%) (sensor) < -35.00 °C (-31.00 °F)	Time (%) (sensor) > -10.00 °C (14.00 °F)
peza-ogya-s9jkh	720h:00m	00h:20m (0%)	719h:40m (100%)	00h:00m (0%)	719h:40m (100%)
zkph-x8pr-7i94o	720h:00m	720h:00m (100%)	00h:00m (0%)	00h:00m (0%)	00h:00m (0%)
Sum of Measurements	1440h:00m	720h:20m (50%)	719h:40m (50%)	00h:00m (0%)	00h:00m (0%)

Statistics

Device	No. Samples	Minimum	Average	STD	MKT	Maximum
peza-ogya-s9jkh	8637	11.31 °C	13.91 °C	0.87 °C	13.96 °C	15.75 °C
zkph-x8pr-7i94o	8637	-29.56 °C	-28.45 °C	0.17 °C	-28.45 °C	-27.69 °C
Grand Total	17274	-29.56 °C	-7.27 °C	0.52 °C	-7.25 °C	15.75 °C

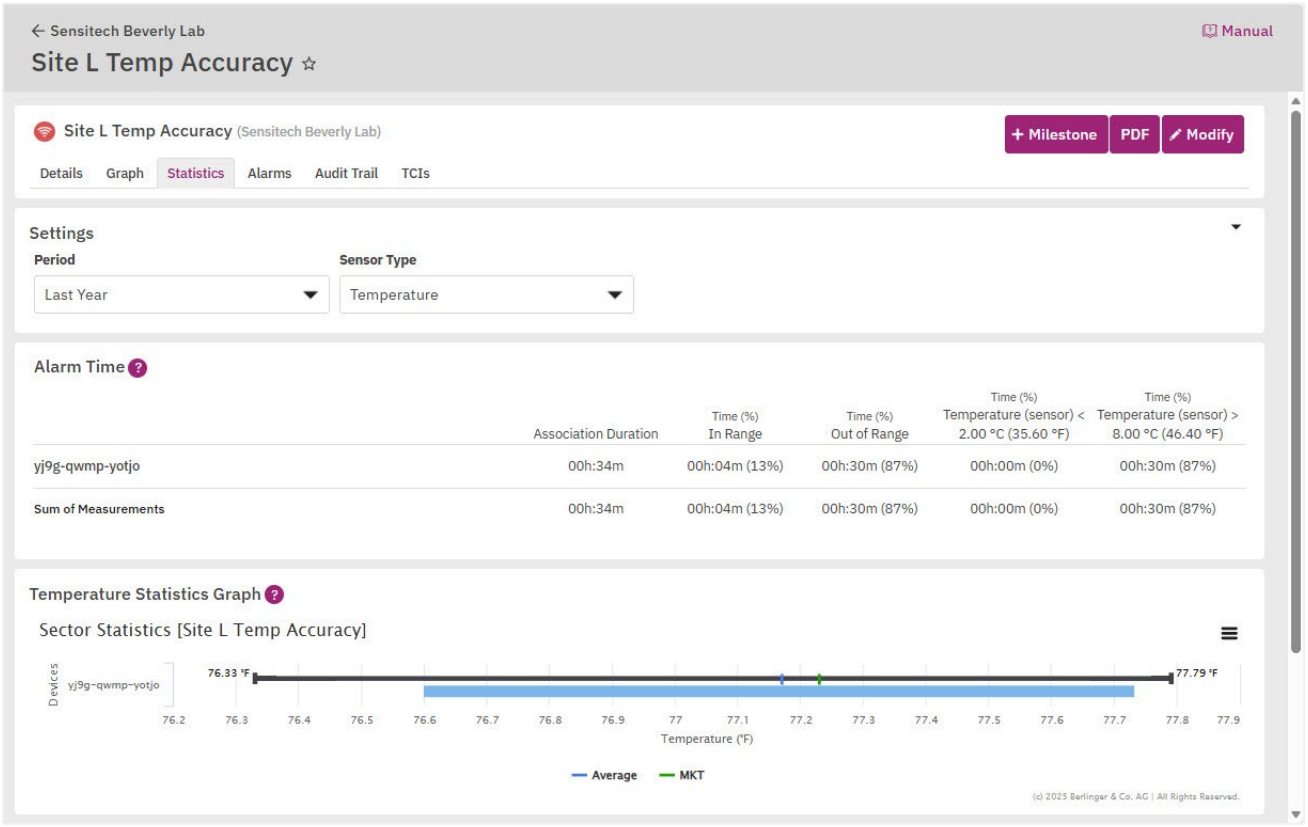


The temperature statistics graph can include two elements:
- The line illustrates the total temperature range from minimum to maximum temperature, with indicators for average and MKT.
- The colored bar indicates the temperature stability, as measured from the average - standard deviation to average + standard deviation.

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Statistics

Temperature and humidity statistics (with a compatible data logger) are shown as line graphs. Minimum, maximum, average values, and for temperature, MKT, are also provided.



3: Statistics View

Settings Section

The following settings can be selected in the **Settings** section of the Statistics view to view sensor statistics data. Refer to the 2: Statistics View figure.

User can view statistics data based on the time selected in the **Settings > Period** field and sensor selected in the **Settings > Sensor Type** field.

Alarm Time Section

The Alarm Time Section in the Statistics view displays statistics for alarms that are within range as well as those that are out of range.

Sector Statistics Section

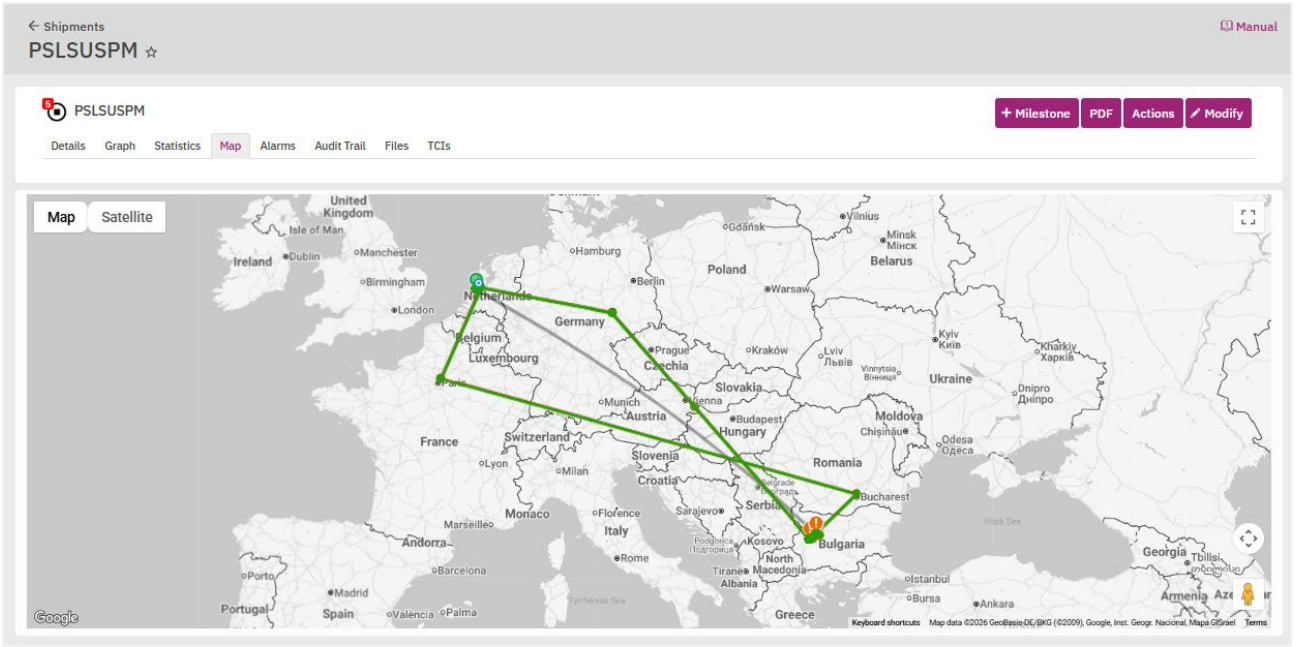
The diagram provides an overview of the information based on:

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- The lowest recorded value (left whisker)
- The highest record value (right whisker)
- The MKT (Mean kinetic temperature) (green mark)
- The STD (Standard deviation) (Colored bar below the line)
- The Average (blue mark)

Maps

The Map section provides a visual representation of shipment routes from origin to destination. Users can monitor the path of shipments in real time or review historical data, observe crucial stops and route alterations, and access relevant device locations and events. This feature facilitates comprehensive oversight and enhances understanding of your shipments' movements.

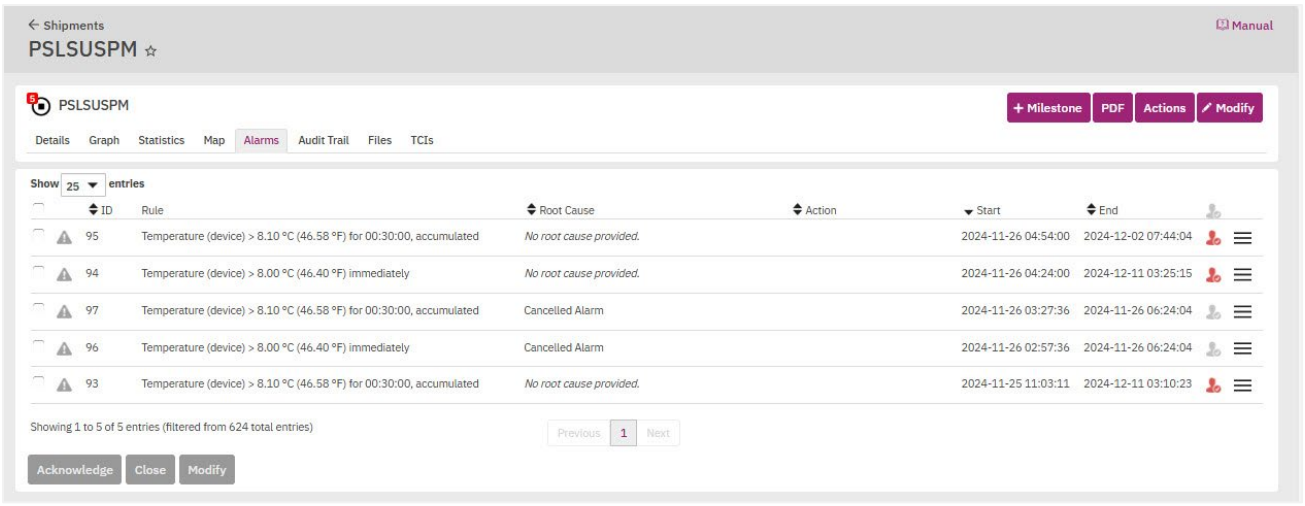


4: Map View

Alarms

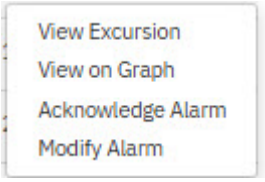
The Alarms section provides real-time alerts and notifications related to your shipments. It enables you to quickly identify and respond to issues such as route deviations, temperature excursions, or other critical events, ensuring proactive shipment management and enhanced supply chain visibility.

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5: Alarms View

You can select alarms and select one of the options available in the ☰ Action Menu:



Users can select multiple alarms and choose one of the options that become available once you select alarm:



Before an excursion can be closed, the excursion must have been acknowledged.

Closing an alarm will automatically acknowledge the alarm.

Alarm Notifications

Alarm notifications belong to the alarm profile and can be set up in either the main Configuration > Alarm profile section or within specific sectors alarm profile.

After SmartView detects any alarm—shipment, sector, or Conventional device—it notifies designated recipients by email or SMS.

Due to regulations, SmartView will not be able to provide SMS notifications in Singapore after July 2023.

The alarm notification per email provides information about:

- Alarm ID

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- Event Rule that has been reached
- Start time of the alarm
- Personalized message
- Recipients
- Last reported message
- Value that has been reached

Table 2: Alarm Notifications

No.	Type	Who	When	How	How often
1	Warning	Main Recipients	When sensor value reaches warning limit, but not alarm limit	email, or email and SMS	One message for each warning situation
2	Alarm Alert	Main Recipients	When sensor value reaches alarm limit, based on value and delay period (e.g. temperature > 8˚C for 15 minutes)	email, or email and SMS	One message for each alarm situation
3	Alarm Reminder	Main Recipients (and when escalated also Escalation Recipients)	When alarm value persists and an alarm is not acknowledged by the user within the repetition interval period	**email only**	Continuously based on the repetition interval when conditions are met
4	Escalation Alert	Escalation Recipients + Main Recipients	When the alarm value persists and an alarm is not acknowledged within the defined delay period	email, or email and SMS (depending on Notification Type for Main Recipients and Escalation Recipients)	One message for each escalation situation.
5	Escalation Reminder	Escalation Recipients + Main	When alarm value persists and escalation is not acknowledged by the user	**email only** (depending on Notification Type for	Continuously based on the repetition
		Recipients	within the repetition interval period	Main Recipients and Escalation Recipients)	interval when conditions are met

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Example Scenario

Event Rules:	Temperature < 15.00 °C (59.00 °F) for 00:15:00, warning when < 18.00 °C (64.40 °F)
Main Recipients:	Gerry, Andy
Notification Type (Main Recipients):	email and SMS
Repetition Interval:	15 minutes
Excursion can escalate:	Yes, with 30-minute delay period
Notification Type (Escalation Recipients):	email and SMS
Escalation Recipients:	Jon, Marlen

Let's assume the following scenario for a cold room with this Event Profile:

- At 10:31h a temperature value of 16.26˚C is received
- At 11:16h a temperature value of 11.30˚C is received
- The temperature remains above 8 ˚C for 4 hours, in which period the users do not acknowledge the excursion in SmartView.

SmartView sends the following message:

- At 10:31h a WARNING MESSAGE is sent to Gerry and Andy by email and SMS
- At 11:46h an ESCALATION ALERT is sent to Jon and Marlen, as well as to Gerry and Andy by email and SMS
- At 12:01 an EXCURSION REMINDER is sent to Gerry, Andy, Jon, and Marlen by email.

Conventional Alarms

Upon uploading a Conventional device file, the system immediately evaluates any Alarms recorded by the Conventional device and converts them into respective alarms. Each Alarm identified in the Conventional device data is systematically translated into one corresponding Excursion. The configuration of an Alarm is reflected in the Rule for its associated Excursion.

For instance, if a Conventional device alarm is configured for temperature "above 44.9°C for 1 hour," the triggered excursion will have a rule stating "Temperature > 44.9 for 01:00:00." Should any specific rule exist within the alarm configuration, it will be explicitly represented in the corresponding Excursion rule as well.

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Alarm time and excursion time are different. The alarm's date and time indicate when the alarm was triggered by its settings.

For example, an alarm at 10:00 against the configuration “above 44.9°C for 1h” means the temperature exceeded 44.9°C from 09:00 to 10:00. The Start time marks when the breach began; this helps pinpoint exactly when the temperature crossed the limit. The End time shows when the temperature returned to normal. If it doesn’t return before the Conventional device stops, the Stop Time is used as the End time. Excursions reported under Accumulated Alarm configuration do not include an end time.

Conventional Device Alarm Notifications

SmartView notifies users about Conventional device alarms once the Conventional device data file is uploaded. If a shipment has an associated Conventional device and defined recipients in its Event Profile before uploading, notification emails are sent to those recipients immediately after the upload.

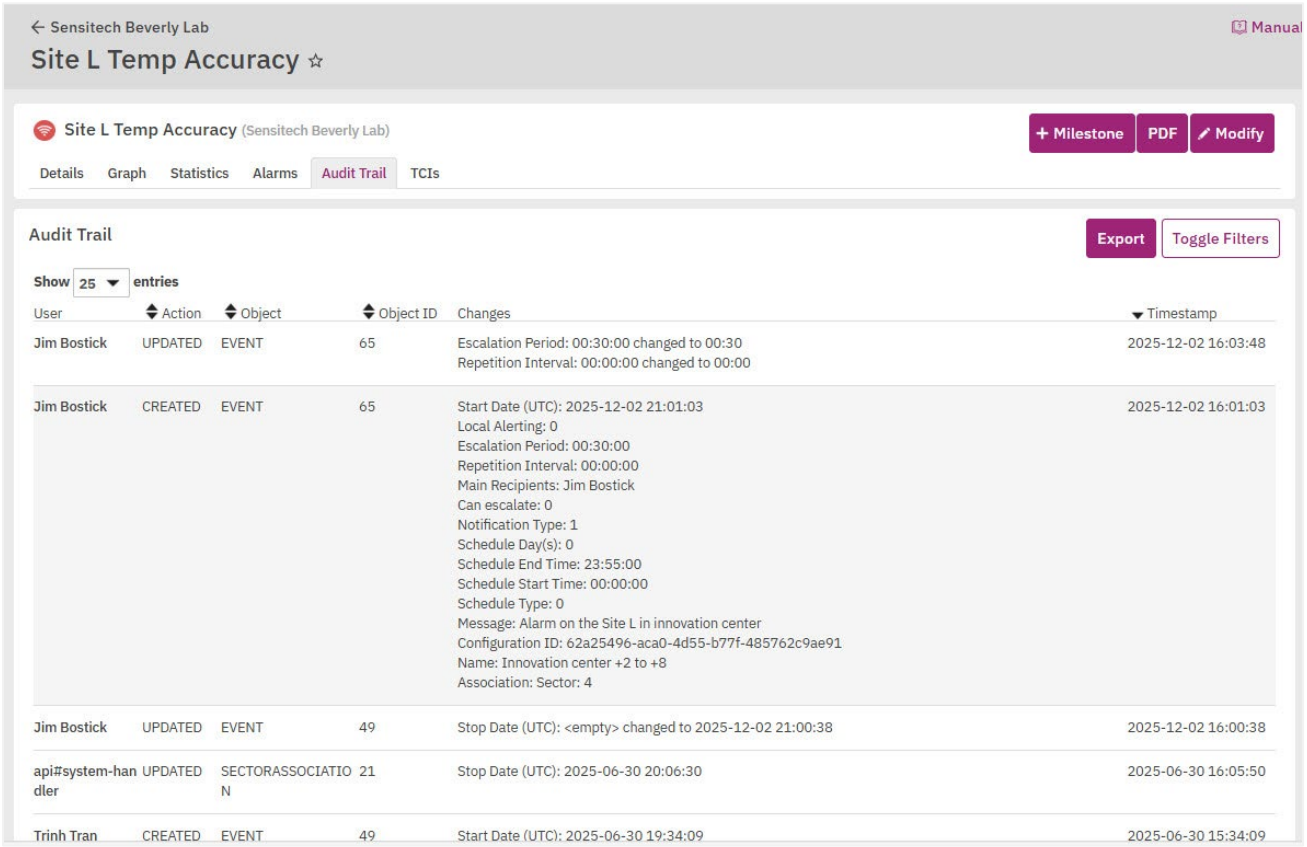
In certain circumstances, the notification email regarding the Conventional device alarm will be directed to the primary contact (such as the Site Manager) rather than to the recipients specified in the event profile:

- Prior to the upload of the data file, if the Conventional device is not associated with a shipment prior to its data file upload
- Prior to the data file upload, if no Event Profile is added to the shipment to which Conventional device is already associated with.

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Audit Trail

The Audit Trail is used to track and record all user activities and changes within the system, providing a detailed log of actions such as acknowledgments, alarm closures, and data modifications. This feature ensures accountability and transparency by allowing administrators and users to review what actions were taken, by whom, and when.



6: Audit Trail View

Audit trail displays the following filters for the information in the audit trail table:

- User
- Action
- Object
- Object ID
- Changes
- Timestamp

While viewing Audit Trail, you can export the data into the PDF format.

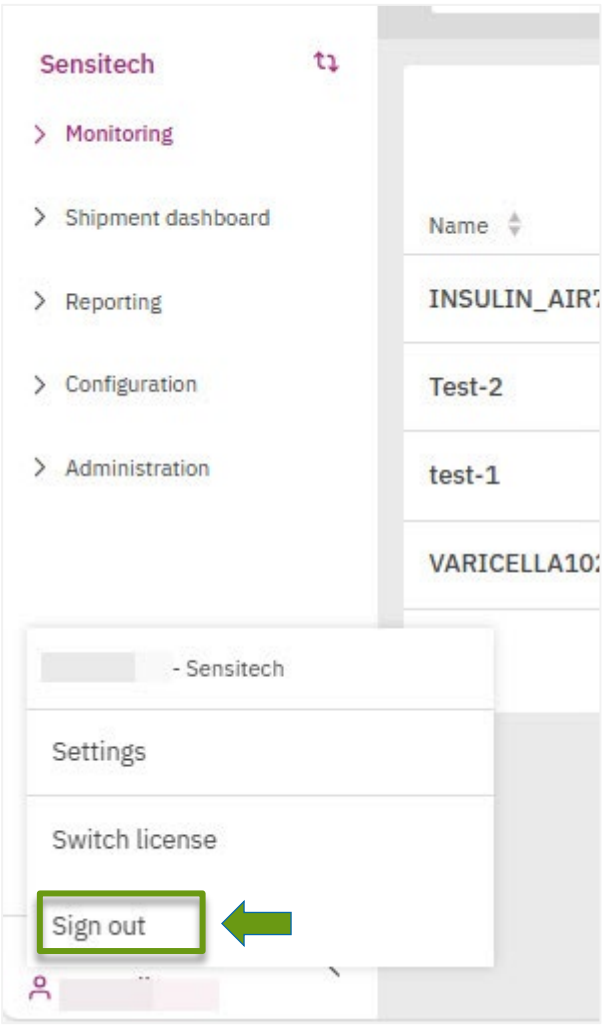
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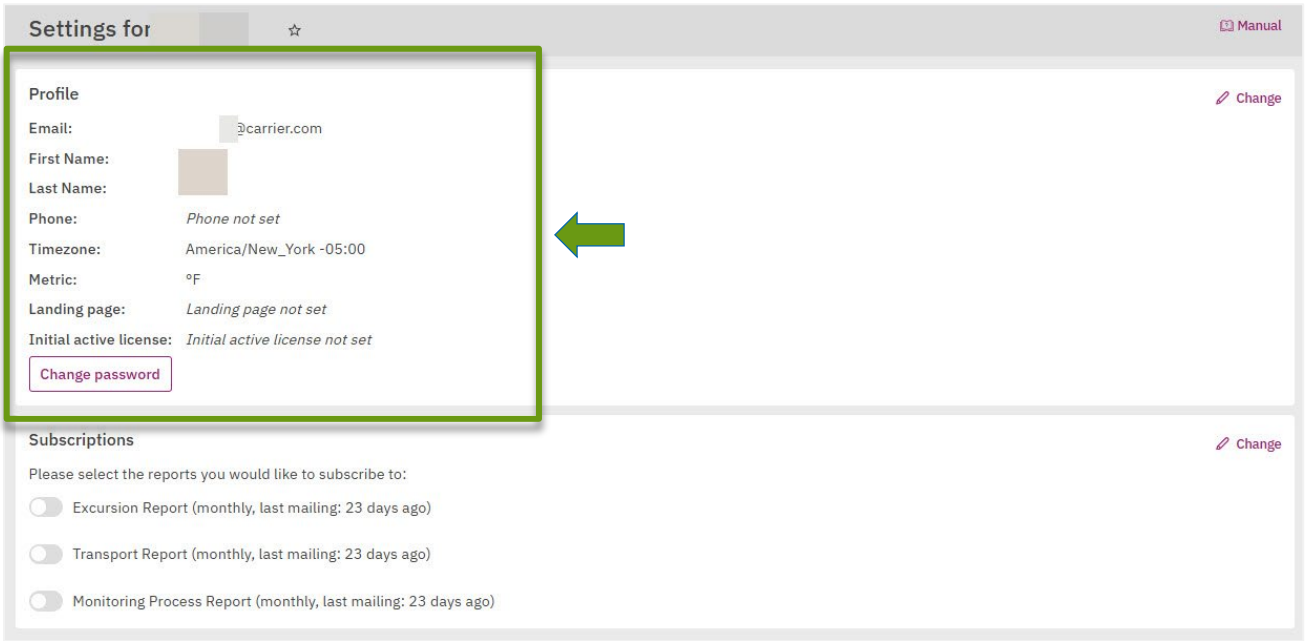
User Profile

To access your personal setting, click your name on the bottom left and select **Settings.**

Settings for your user open in the new window where you can edit your settings, change your password and subscribe to monthly reports.

Subscriptions' monthly reports are delivered directly to their account via email.

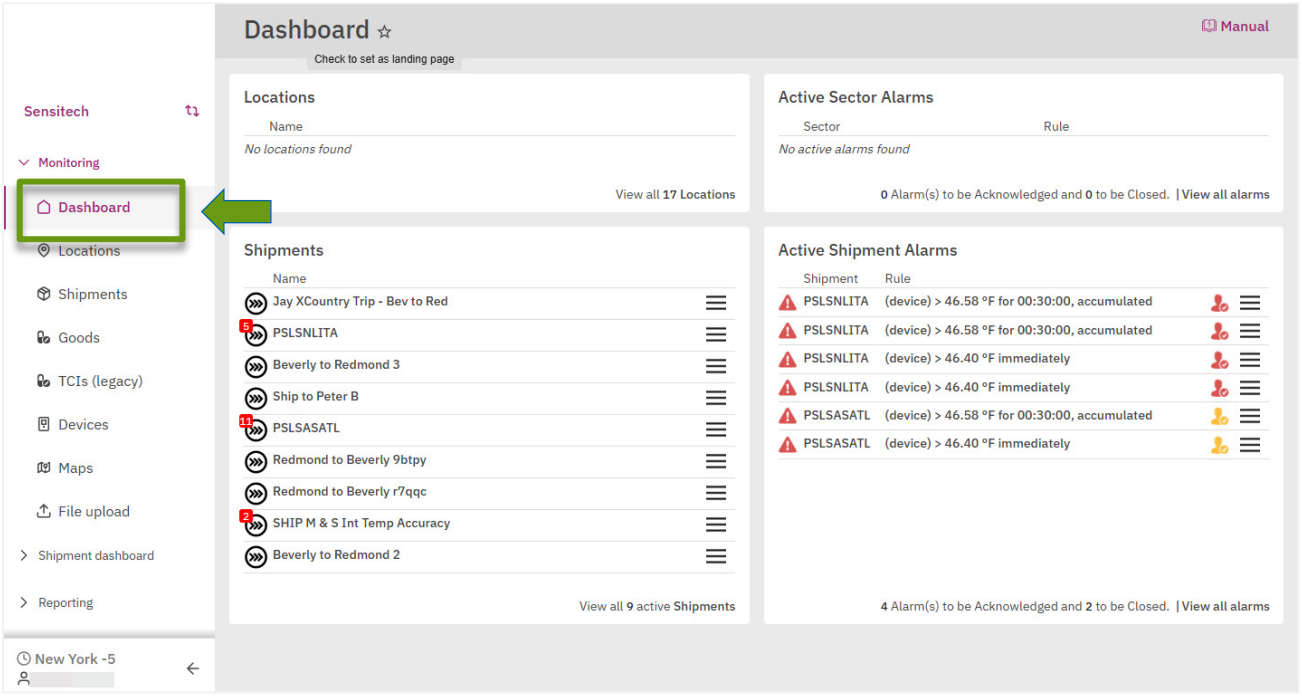




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Monitoring

In the Monitoring area, click on the Dashboard. The following view displays:



7: Monitoring > Dashboard

Dashboard

The **Dashboard** area is divided into 4 areas:

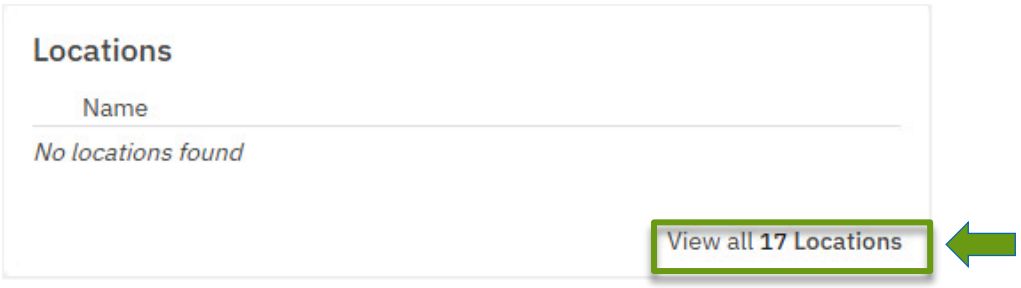
- Locations
- Active Sector Alarms
- Shipment
- Active Shipment Alarms

Click on the ☆ to set Dashboard to be a landing page when you log in to SmartView.

Locations Section

All locations within this area that receive data through a live monitoring device are listed and accessible.

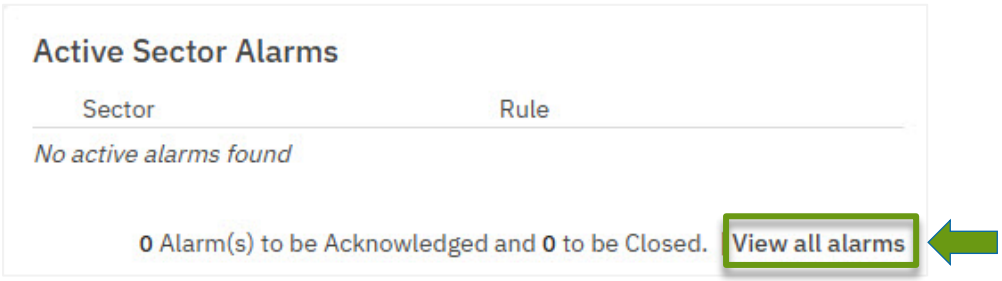
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To view all active locations, select **Locations** located at the bottom right corner of the tile.

Active Sector Alarms Section

This section displays a list of all ongoing alarms within each sector, representing violations that remain active.



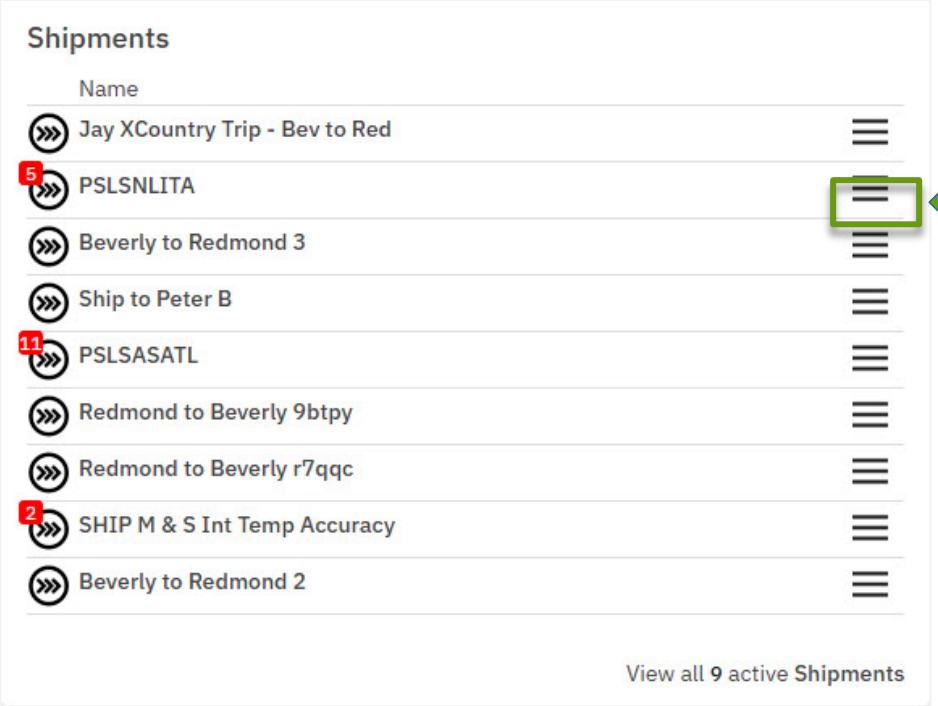
8: Dashboard – Active Sector Alarms sections

To access the complete list of current sector alarms, select **View all alarms** located at the bottom right corner of the tile.

Shipments Section

All active shipments are shown here. To view them, click **Shipments** at the bottom right of the tile.

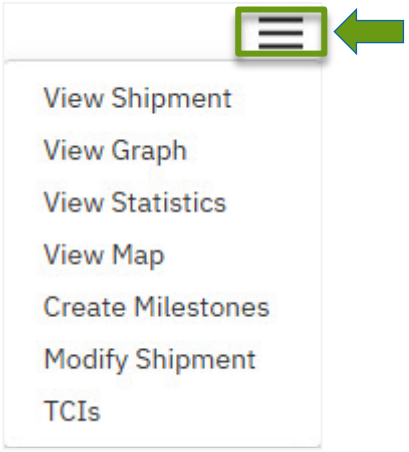
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9: Dashboard – Shipments section

You can select a shipment, and choose one of the following actions from the ☰ Action Menu for the shipment selected:

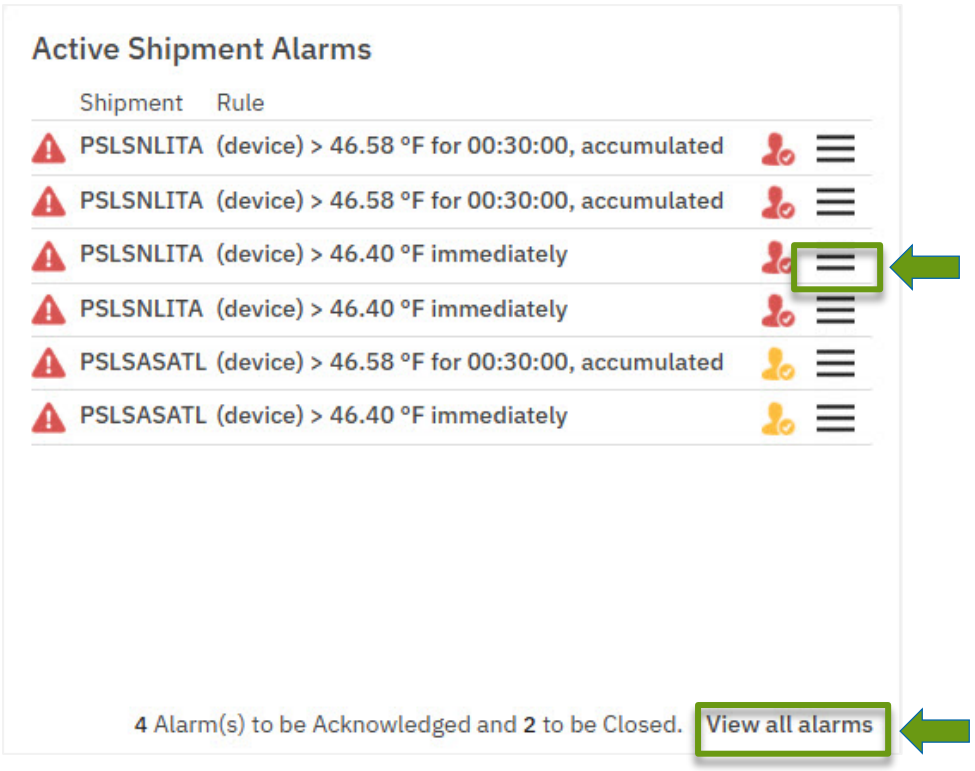
- View Shipment
- View Graph
- View Statistics
- View Map
- Create Milestones
- TCIs



Active Shipment Alarms Section

This section displays a list of all ongoing alarms related to shipments, such as active violations.

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10: Dashboard – Active Shipments Alarms section

Users can access all current shipment alarms by selecting **View all alarms**.

Locations

A location can serve two primary functions:

- As a **site** designated for Stationary Monitoring (STM), which forms part of a monitoring network.
- As either an origin or a destination for shipments.
  - An **origin** refers to the location where a shipment starts.
  - A **destination** signifies the location at which a shipment is received.

About Location Geofence

Locations used for shipments often have a geofence assigned to them.

A **geofence** is a virtual boundary set around a specific geographic location using GPS or RFID technology. When a shipment enters or exits this predefined area, the system can trigger alerts or actions, helping monitor and manage shipments as they move between origins and destinations.

About Location Sectors

Locations defined for stationary monitoring may have various sectors assigned to them.

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A **sector** is a designated area within a location where packages are stored, each providing different storage conditions—like cold refrigeration or room temperature. Examples of sectors include containers, refrigerators, warehouses, or work facilities.

Location and Sector Notifications

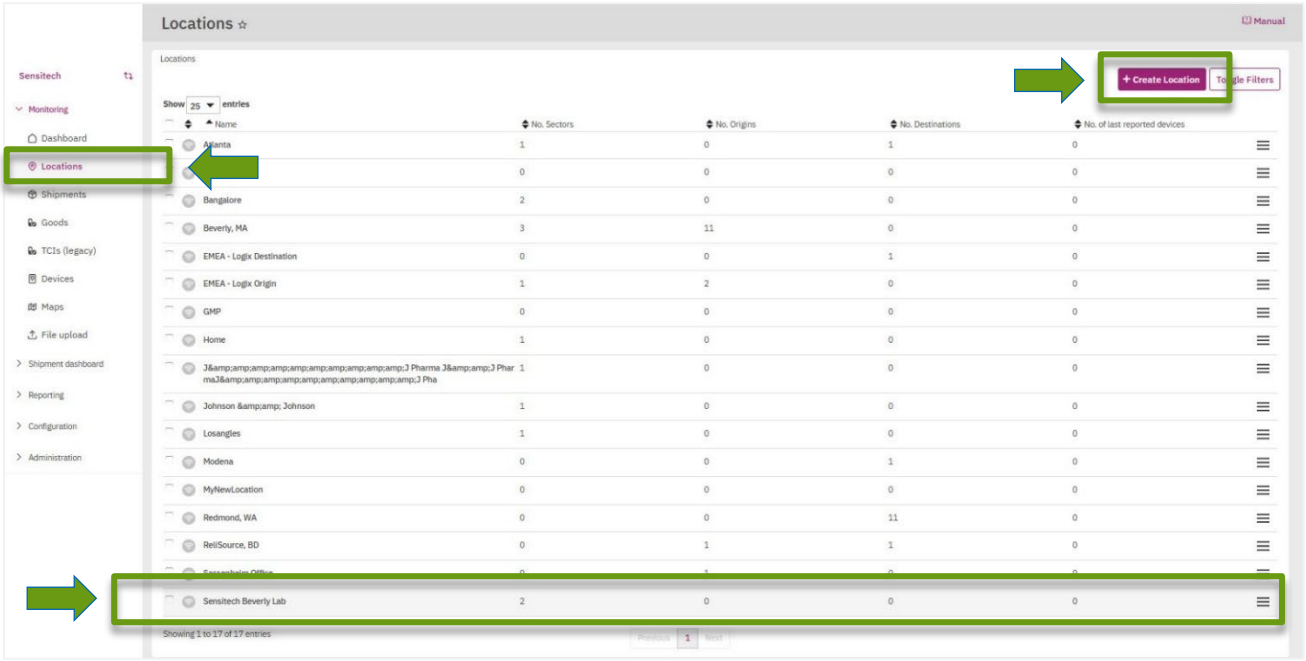
The location contact will receive a notification whenever the network is offline for over 60 minutes, regardless of the situation.

If notifications are set to be enabled by default, you cannot change this setting. To request any changes to network notifications, please reach out to Sensitech Support Services at Sensitech.support@carrier.com.

Location List

The locations list offers a comprehensive overview of all locations established within the system, displaying their respective network statuses (offline or online).

To view a location list, select **Monitoring > Locations**. A list of locations display:



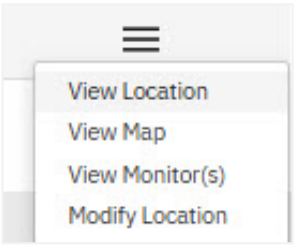
11: Monitoring > Location List

From the location list, you can do the following:

- Click on a location to view the details of the location.
- Select a location, then choose an appropriate action from the ☰ Actions Menu on the right corresponding to that location:

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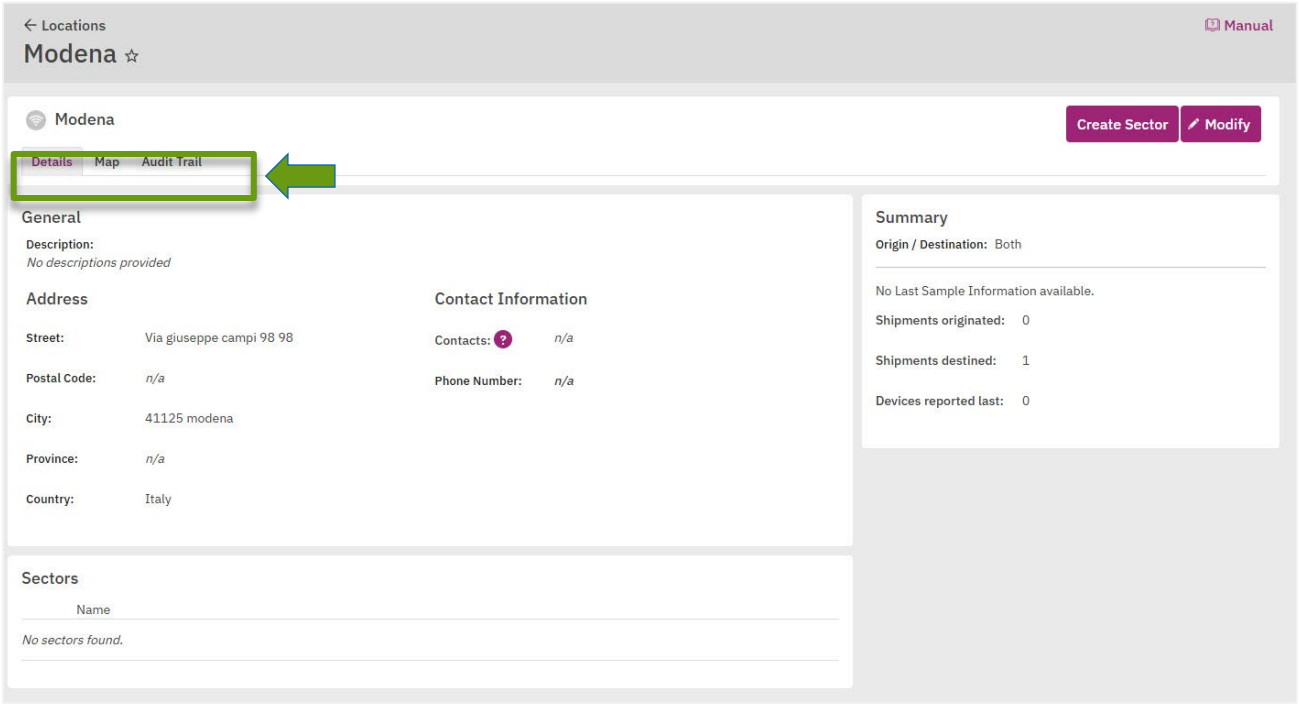
- View Location
- View Map
- View Monitor(s)
- Modify Location



- Create a new Location by clicking on the **Create Location** button on the top-right corner of the screen.

Location Page

Location page displays details about a location. From the Location List page, clicking on the location name to be redirected to the Location Details page:



12: Monitoring – Location Page

The Location page has the following tabs:

- Details
- Map
- Audit Trail

This section explains the Location page tabs and their contents.

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Details Tab

The **Details** tab contains the following sections:

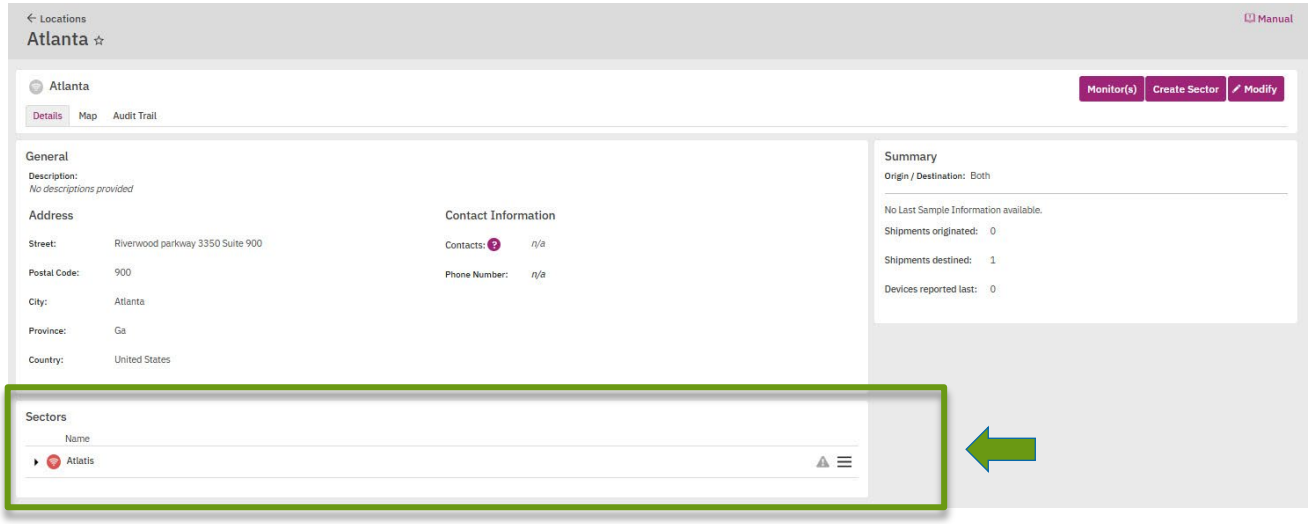
- General
- Sectors
- Summary

General Section

This section includes general information about the location such as name, address and contact information for location notifications.

Sectors Section

This section of the tab provides a list of all the sectors within the location.



13: Monitoring – Location Page with Sectors

Expand the Sectors section to view a list of sectors. You can select an individual sector to view detailed information about that sector. For more information about Location Sectors, please refer to the Location Sectors.

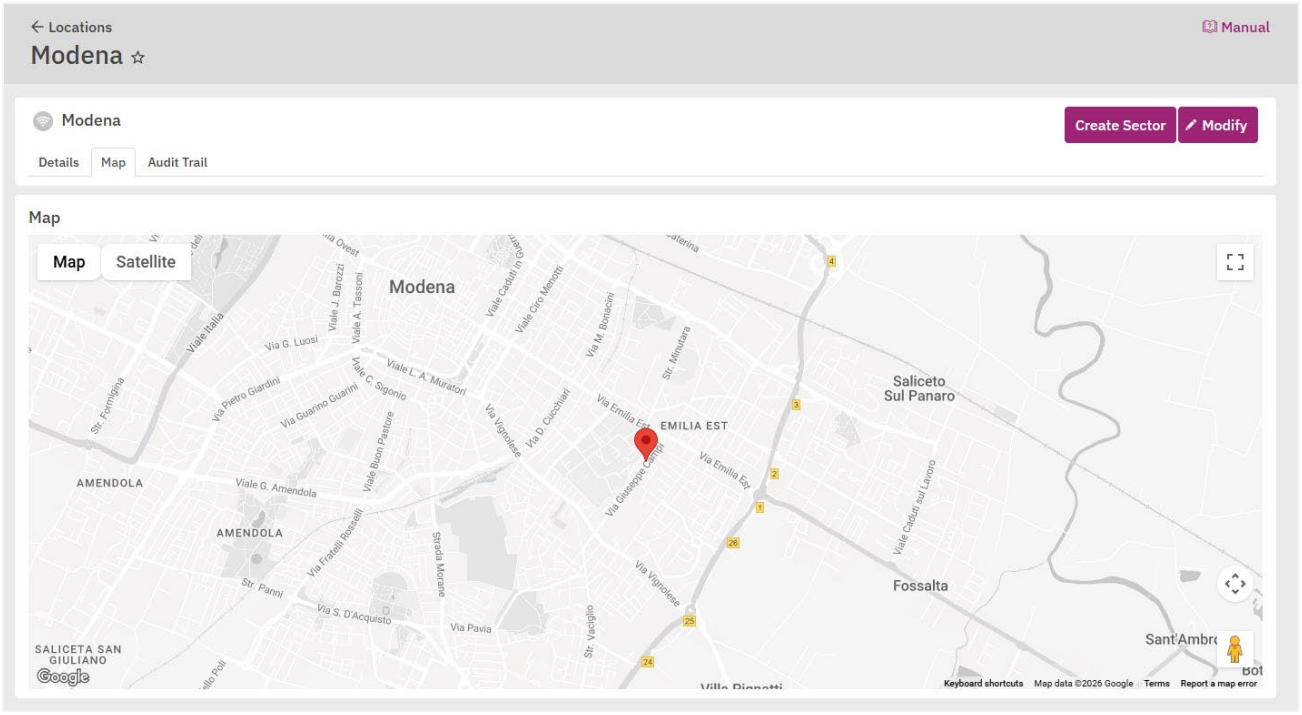
Summary Section

Summary Section includes Origin, destination, and last sample information available.

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Map Tab

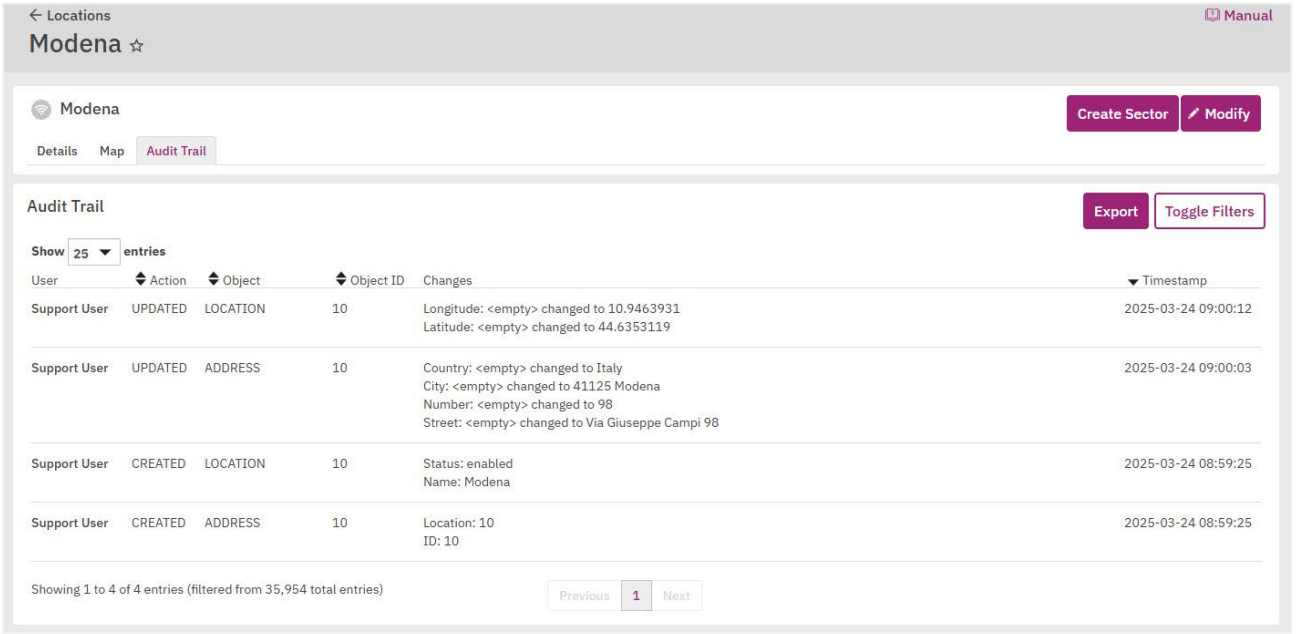
The **Map** tab contains a map where the location is visible, including a defined geo fence.



14: Location – Map Tab

Audit Trail Tab

The Audit Trail tab displays audit trail for a location.



15: Location – Audit Trail Tab

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Users can review the entries with detailed information about any changes and timestamps on where the changes occurred.

On this page, users can Export the audit trail and filter by specific parameters.

Page Actions

While viewing a Location page, the following options are available to a user:



- Create Sector
- Modify (Location)

Create Sector

Refer to the *Location Sectors* to learn more about Location sections and how to create one.

Modify

Click on Modify to open the Location in the modify more. You can also open any location in the modify mode by selecting a location from the Location list and then selecting **Modify Location** from the ☰ Action Menu.

Monitors

Monitors show an overview of all sectors at a location. It is available for all locations that have sectors.

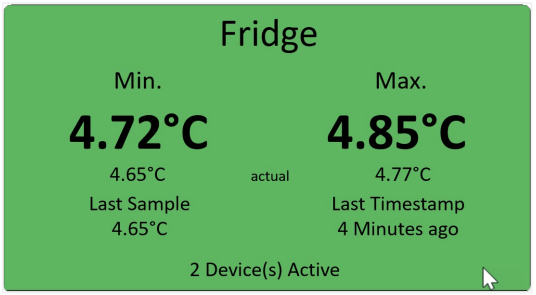
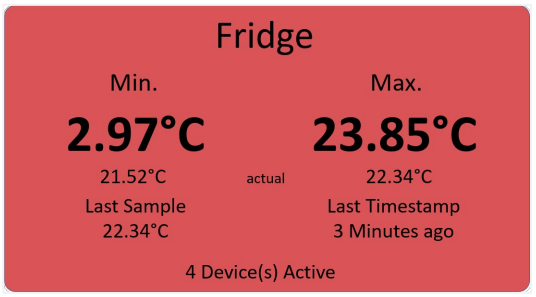
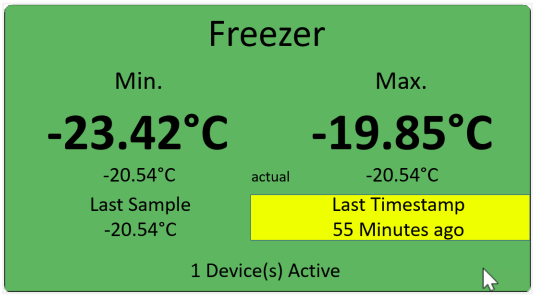
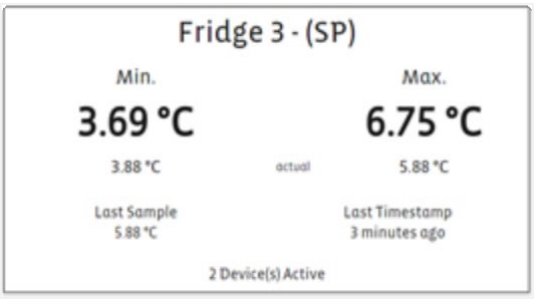
From a Location page, click on **Monitors**.

Clicking on monitor(s) displays a color-coded overview of all sectors in a location, opening in a separate window for easy monitoring on an external screen.

Note that this option may not be available if no monitors are associated with the location sector(s).

Color	Status	Display

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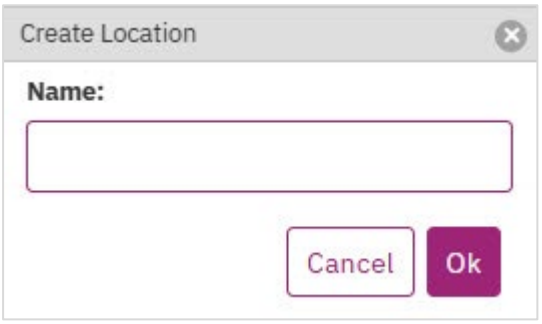
green	Actual temperature within set limits. **Temperature Monitor Description** • Big figures – 4.72°C and 4.85°C show the **minimum** and the **maximum** measured temperature over the last 24 hours. • Small figures – 4.65°C and 4.77°C) the **last** timestamp. • **Last sample** and **Last Timestamp** – 4.65°C (taken 4 minutes ago) shows the temperature of the most recent measurement.	
red	Actual temperature outside set limits	
yellow	Sector offline	
white	No event profile is set for this sector	

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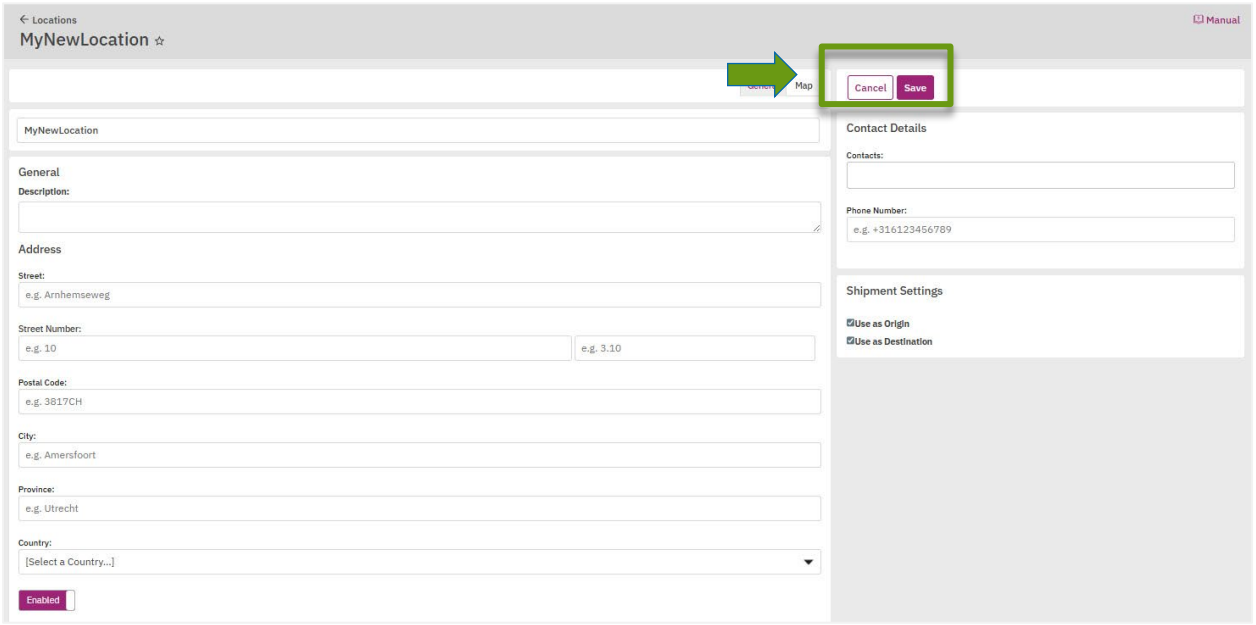
Create Location

To create a location, complete the following steps:

1. From the Main Menu, click on the **Monitoring > Locations**. This will display a list of all locations in SmartView. Please refer to figure *9: Monitoring > Location List* on page *42*.
2. From the list of locations, click **Create Location**.
3. In the pop-up window, provide the name of the location and then click **OK**.



The new Location screen displays with two tabs – **General** and **Map**:



4. In the **General** tab, provide the following location information:

   a) In the **Details** field**,** provide detailed location information.
   b) In the **Address** field**,** provide location address.

> If you've set your address under the **General** tab, you can click the **Auto Location** button to automatically populate the latitude and longitude fields.

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c) In the **Contant Details** section, provide contact details for the individual responsible for the location (Location Manager)

If network monitoring is enabled for your site, the system will use this email address to send notifications should the network at the location remain offline for more than one hour.

If the notification is enabled by default, it cannot be modified. For changes to network notifications, please contact Sensitech Support Services at Sensitech.support@carrier.com.

d) In the **Shipment Settings** section, select Origin, Destination, or both.

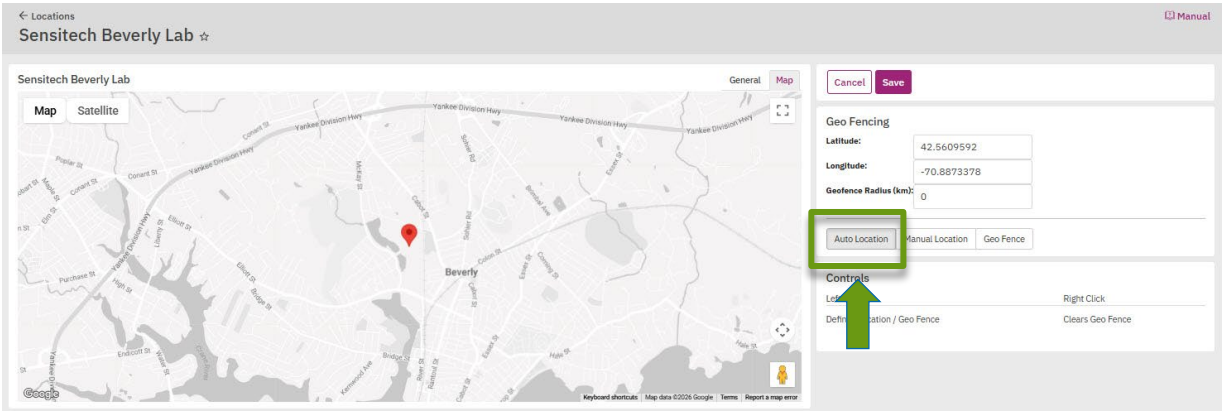
If selected, you can designate this location as the origin, destination, or both for a shipment.

5. Toggle **Enabled/Disabled** option to enable or disable this location.
6. Switch to the **Map** tab:

The general map is displayed with the **Manual Location** tab selected as a default tab.

a) In the **Geo Fencing** tab, provide Latitude and Longitude for your location, if needed.

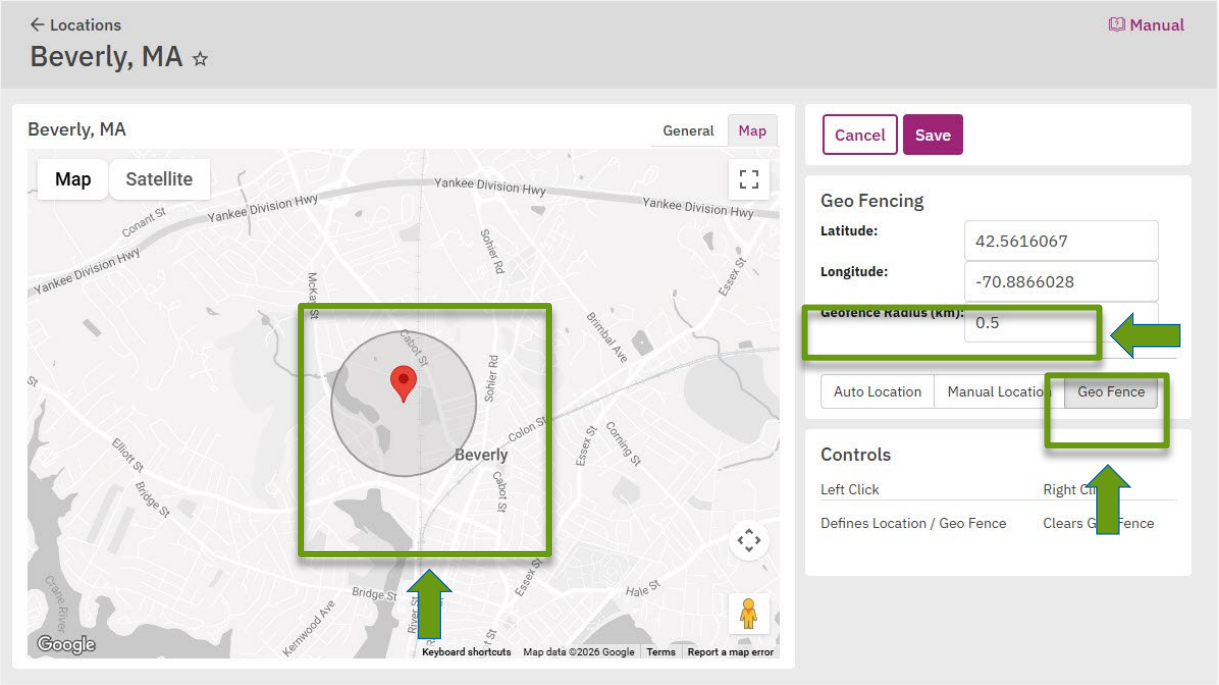
If you've set your address under the **General** tab, you can click the **Auto Location** button to automatically populate the latitude and longitude fields.



b) In the **Geofence Radius** field, set the geofence and then click the **Geo Fence** button.

The circle and its radius will appear around your chosen location and be listed in the radius field.

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You can also use the right and left-clicks on your mouse to define or to reset the geo fence.

- Use left-click to define geofence.
- Use right-click of the mouse to clear Geo Fence.

As accuracy may vary it is recommended not to set the perimeter too restrictive.

7. Click **Save** to save your location.

Modify Location

After the location is created, user can make modifications to the location.

To modify your location by accessing the Modify screen from one of the following ways:

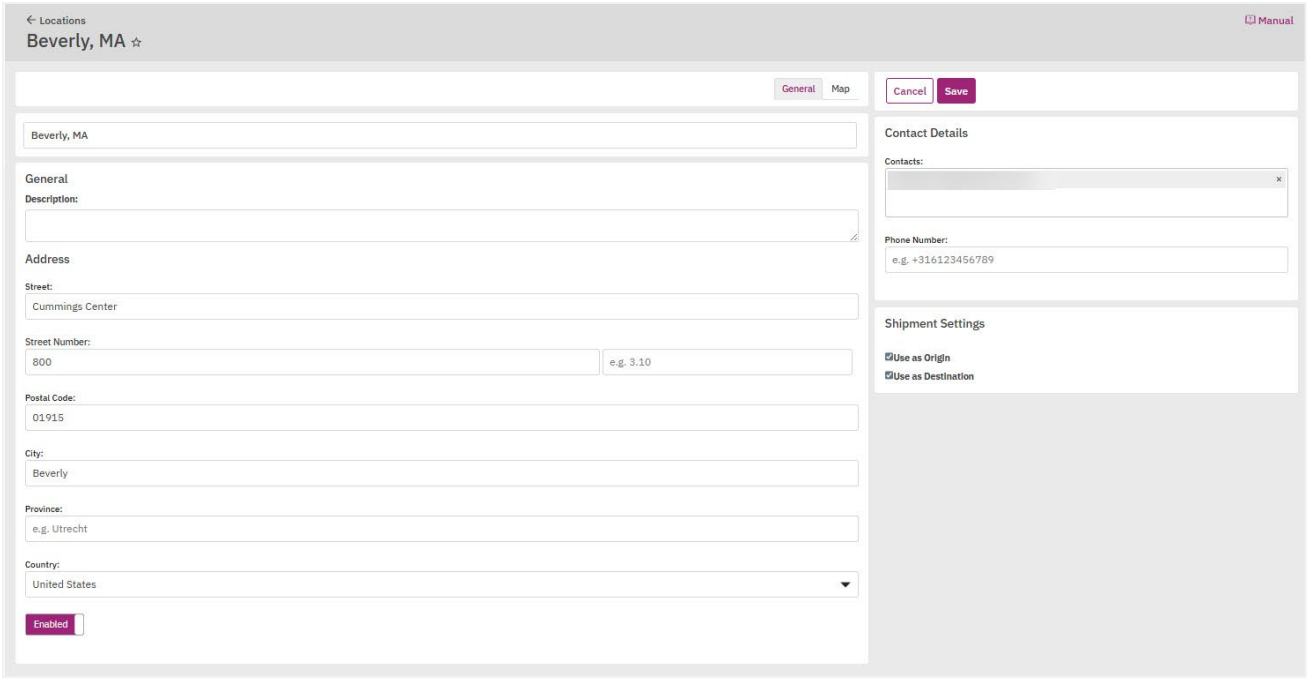
1. From the Locations list – select a location you want to modify, click on ☰ Action Menu icon and then select **Modify Location**:



2. From the Location page, click **Modify**.

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The Location displays in modify mode where you can make modifications to the Location details, add sectors, enable and disable the location.



16: Location – Modify Mode

Enable/Disable Location

If you want to enable or disable a location, use the toggle **Enable/Disable** on the bottom of the Location **Details** tab of the Location in Modify mode.

1. From the Locaiton page, click **Modify**. The system opens the page in the Modify mode.
2. Scroll down to the toggle **Enable/Disable** and change settings.
3. Click **Save** to save your settings.

A location cannot be deleted; it can only be disabled.

Location Sectors

A location can have multiple sectors assigned to it. A **Sector** is a designated area within a location where packages are stored, each providing different storage conditions—like cold refrigeration or room temperature. Examples of sectors include containers, refrigerators, warehouses, or work facilities.

Each sector manages storage and monitoring of various package types, using event profiles to track them and send alerts if any discrepancies occur.

To monitor packages within a specific area, devices need to be assigned to a sector through the Sector Association feature.

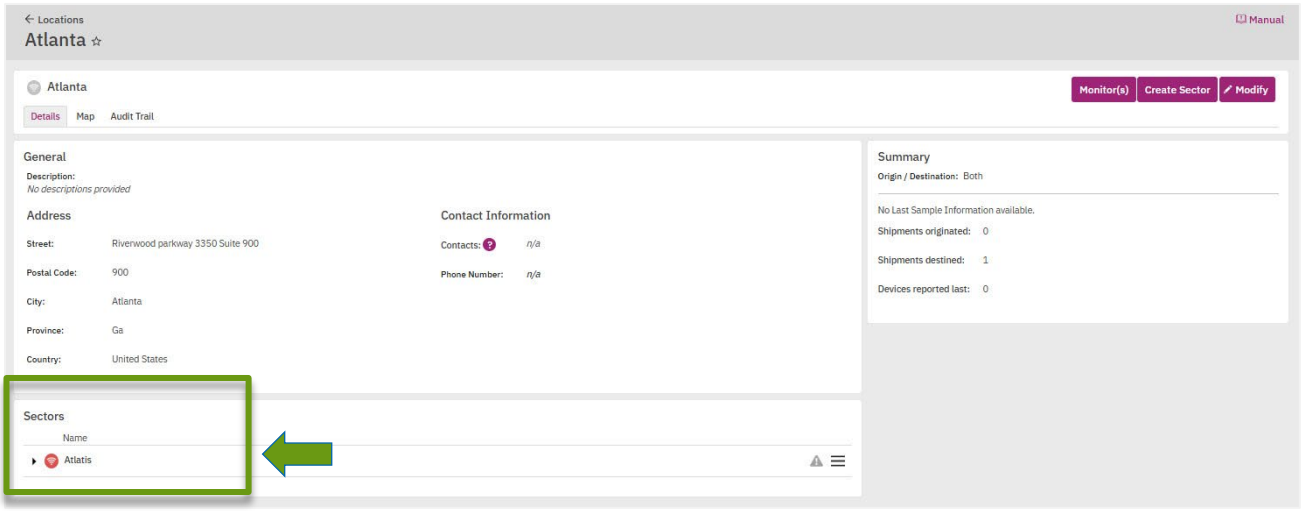
© Carrier. All Rights Reserved.

Sector Association allows users to define how long a device is linked with a sector, ensuring that all data gathered from the device during this period is used to effectively monitor that sector.

This section describes how to create sectors and assign them to locations.

Sector Page

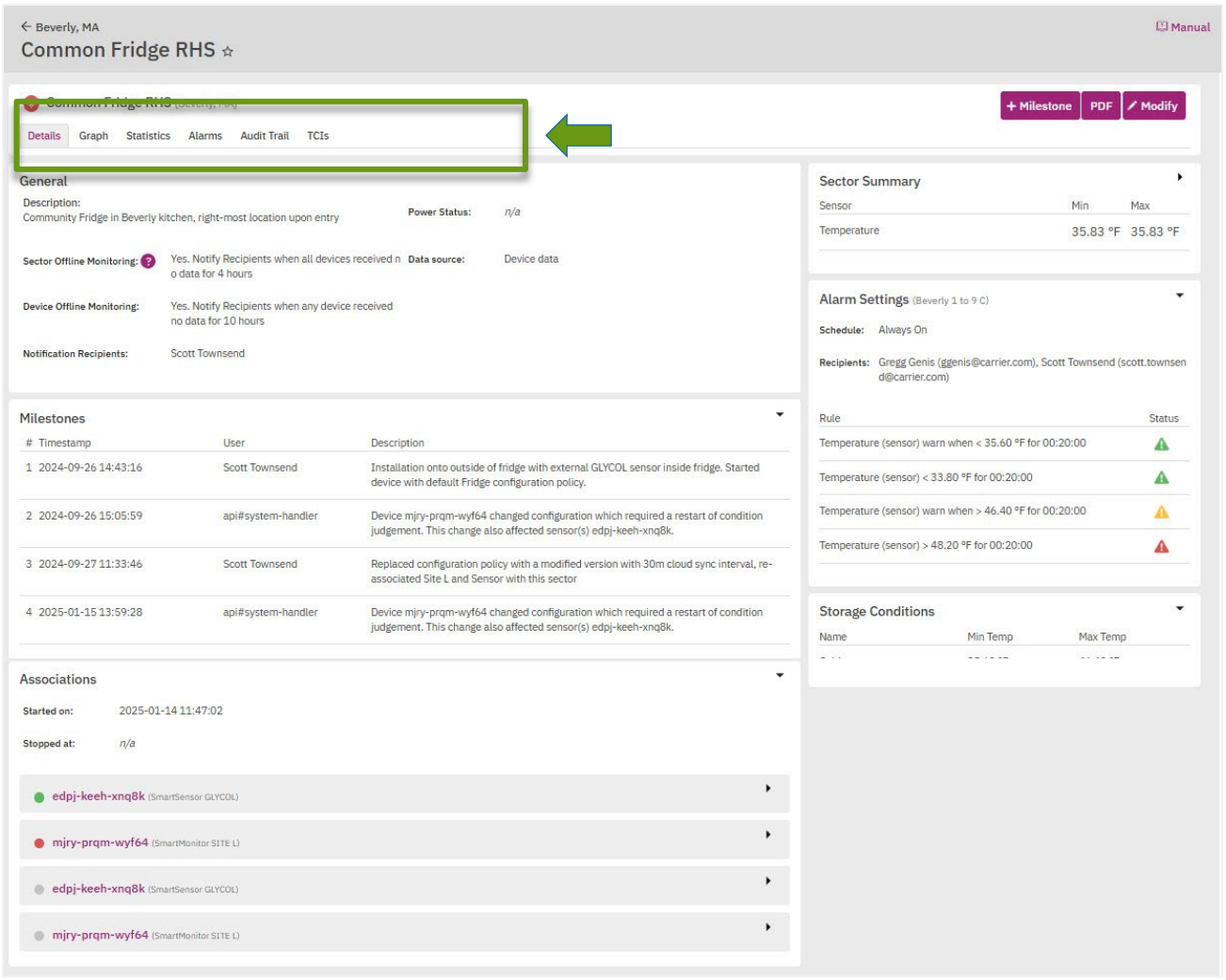
From a Location page, in the **Sectors** section, select a sector:



17: Location Page with Sectors section

A Sector page displays:

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18: Sector Page – Details

In this section of the document, we are going to review sector page and learn how to create, modify, enable/disable sectors.

Sector page contains the following tabs:

- Details
- Graph
- Statistics
- Alarms
- Audit Trail
- TCIs

Details Tab

A location sector page opens with the Details tab as a default tab where you can find the following information about the sector:

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General Section

General Section includes the following:

- Description: This section allows users to manually enter a description of the sector.
- Sector offline monitoring: Offers an overview of the rules configured for monitoring when the sector goes offline.
- Device offline monitoring: Summarizes the rules set up for tracking when individual devices are offline.
- Notification recipients: Lists the recipients designated for notifications regarding sector or device offline events.
- Power status: Displays the sector's power status where applicable.
- Data source: Indicates whether the sector uses manually input data or data supplied by devices.

Milestones Section

SmartView allows users to log key information about a specific sector by letting them add milestones. For example, if an event like sector downtime occurs, a user can create a milestone such as "Fridge without power for one hour" to record what happened precisely.

Associations Section

This area will provide an overview of all past and present associations in the sector. With a click on the triangle on the top right the window can be expanded and further information displayed.

Sector Summary Section

This section summarizes the sector by noting the maximum and minimum values from recent samples, along with information about the latest active device.

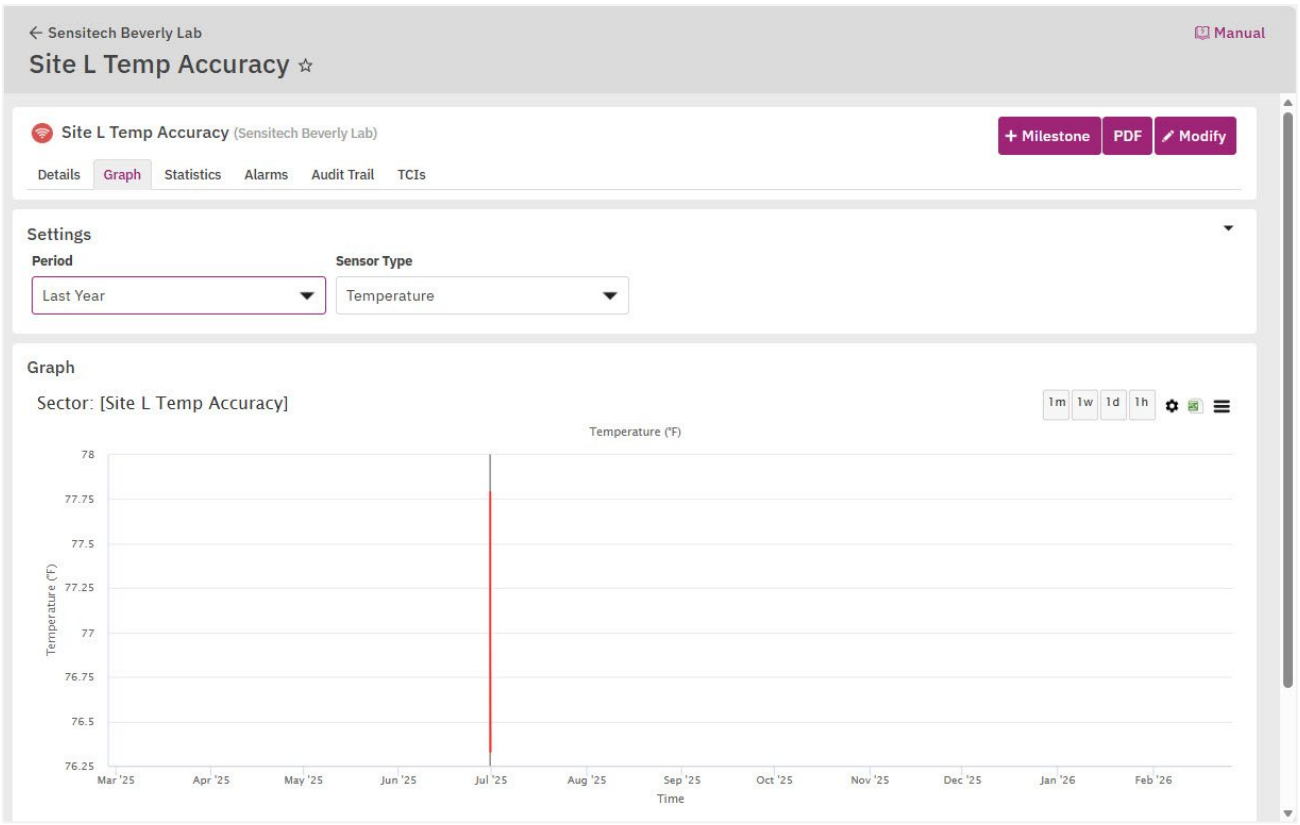
Alarm Settings Section

This section provides information on which event profile is currently set for this sector:

Graph Tab

Select **Graph** tab to view Location sector graph.

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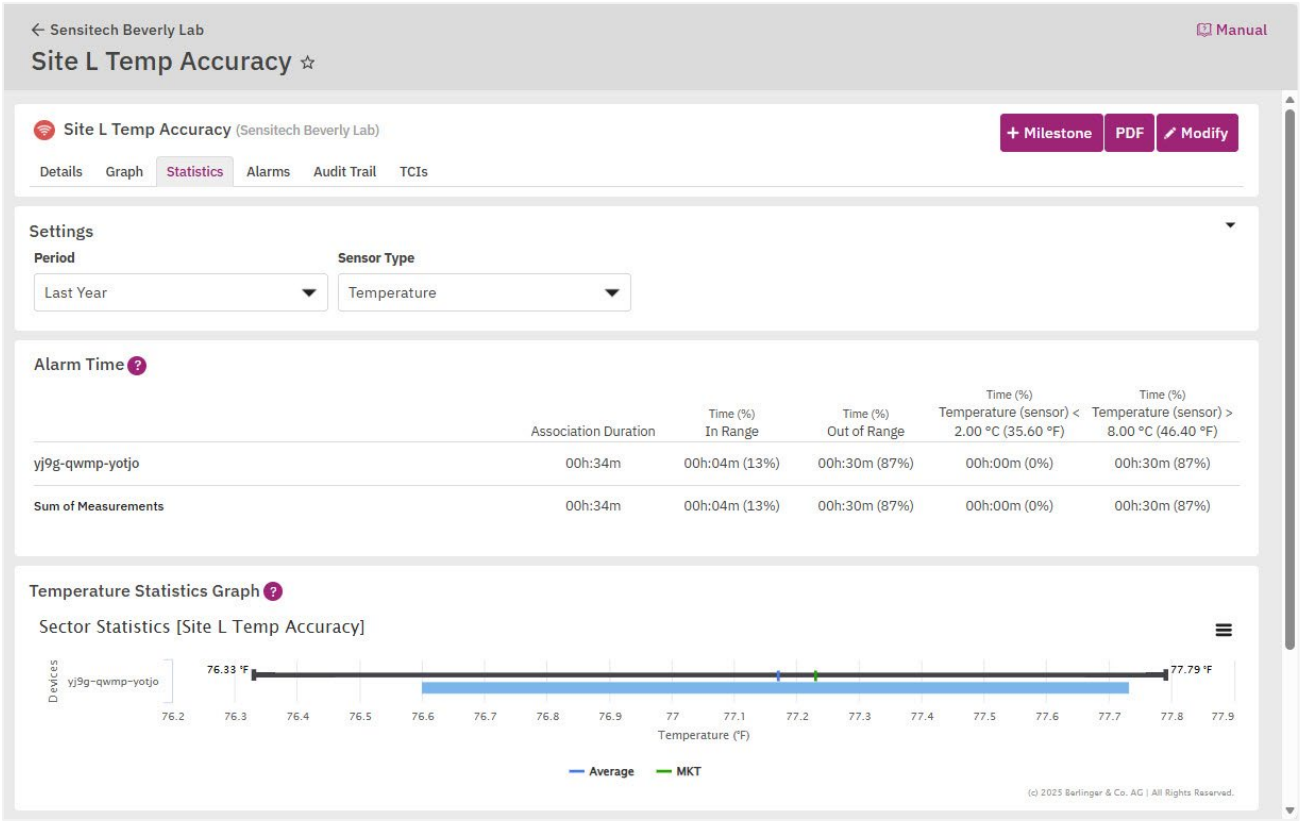


19: Sector – Graph Tab

For more information about graphs in SmartView, please refer to *Graphs* section in Common Elements in SmartView.

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Statistics Tab



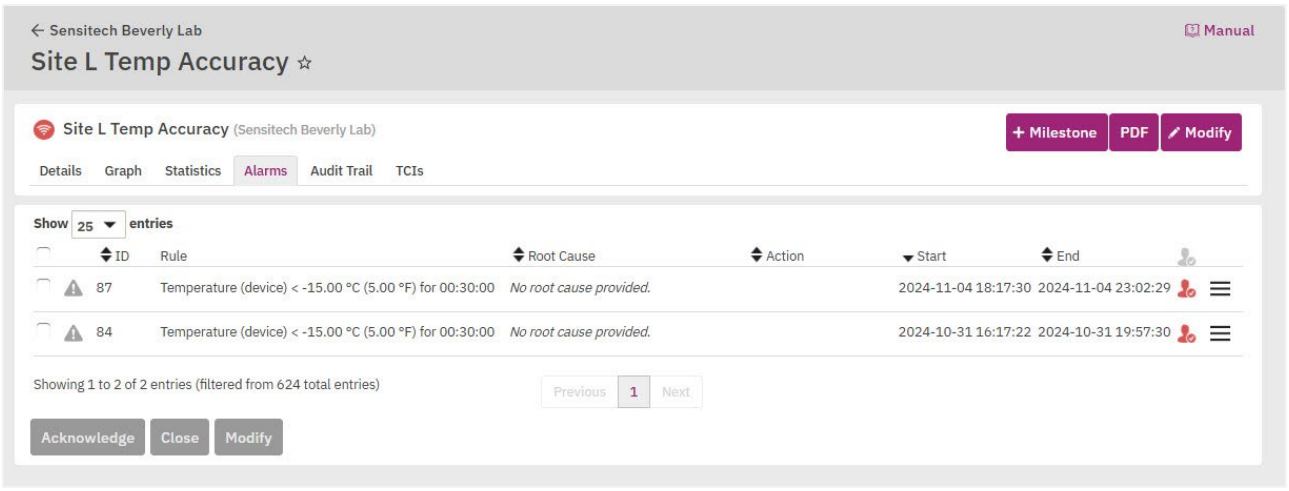
20: Sector – Statistics Tab

Alarms Tab

The Alarms tab provides an overview of all alarms that were triggered within the sector. Within the table that can be found here the following information for each alarm:

- Rule
- Root Cause
- Action
- Start
- End

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21: Section – Alarms Tab

Select an alarm and then from the ☰ Actions Menu, select one of the following options:

- View Excursion
- View on Graph
- Acknowledge Alarm
- Modify Alarm

You can select multiple alarms and then select one of the following options listed at the bottom of the page:



Acknowledge Alarm

Alarms are marked with the ⚠ icon. To acknowledge an Alarm, select a single or multiple alarms from the Alarm list and then click **Close** button at the bottom of the list.

Confirmation message will ask you to confirm alarm confirmation. Click **OK** to confirm.

When an excursion is acknowledged, SmartView emails recipients with details on who confirmed it, who received updates, the excursion's description, root cause, and actions taken. No further notifications are sent about that incident, as it is considered resolved.

Close Alarm

An alarm can be closed after the situation has been resolved and corrective measures have been implemented. The alarm must first be acknowledged by the user before it can be closed. Closing an alarm serves to record that the situation was handled appropriately.

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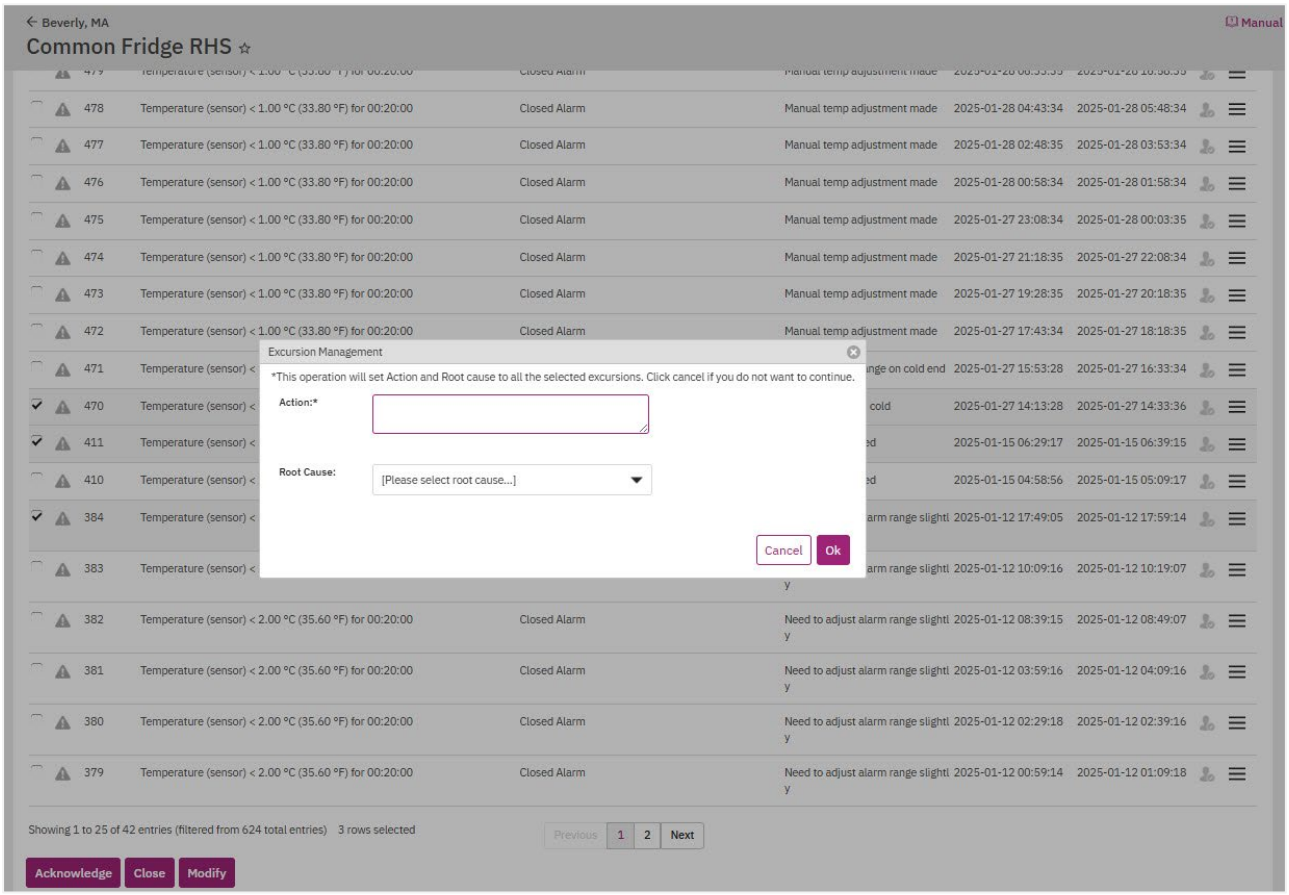
Alarms must remain open while the situation persists.

To close an Alarm, select a single or multiple alarms from the Alarm list and then click **Close** button at the bottom of the list:

Modify Alarm

To modify alarm, select an alarm or multiple alarms from the list and then click the **Modify** button at the bottom of the screen.

Alarm page opens in the modify mode where you can make add corrective action or add root cause:

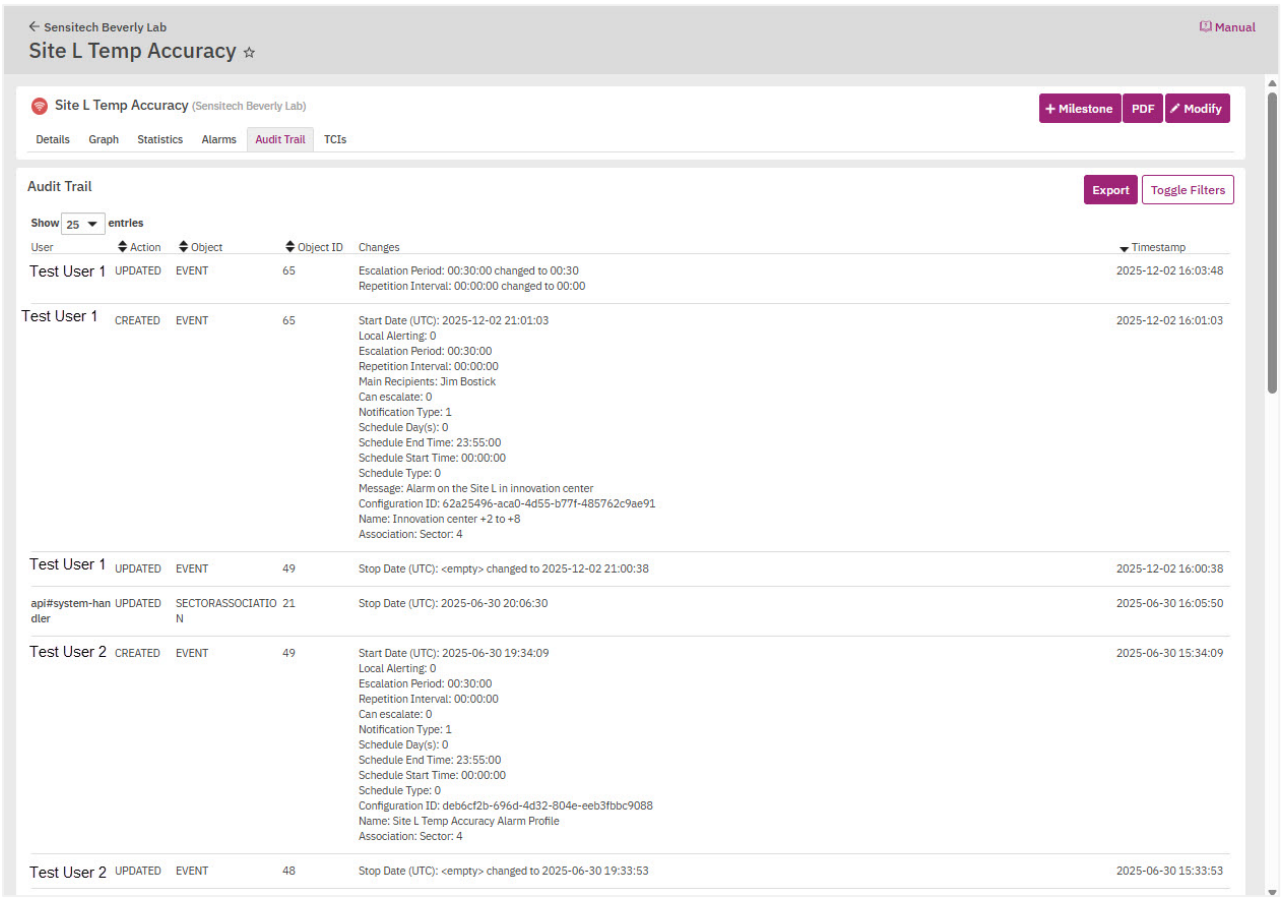


22: Location Sector Page – Alarms – Modify

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Audit Trail Tab

Click on the Audit Trail Tab to view Audit Trail:



23: Sector - Audit Trail Tab

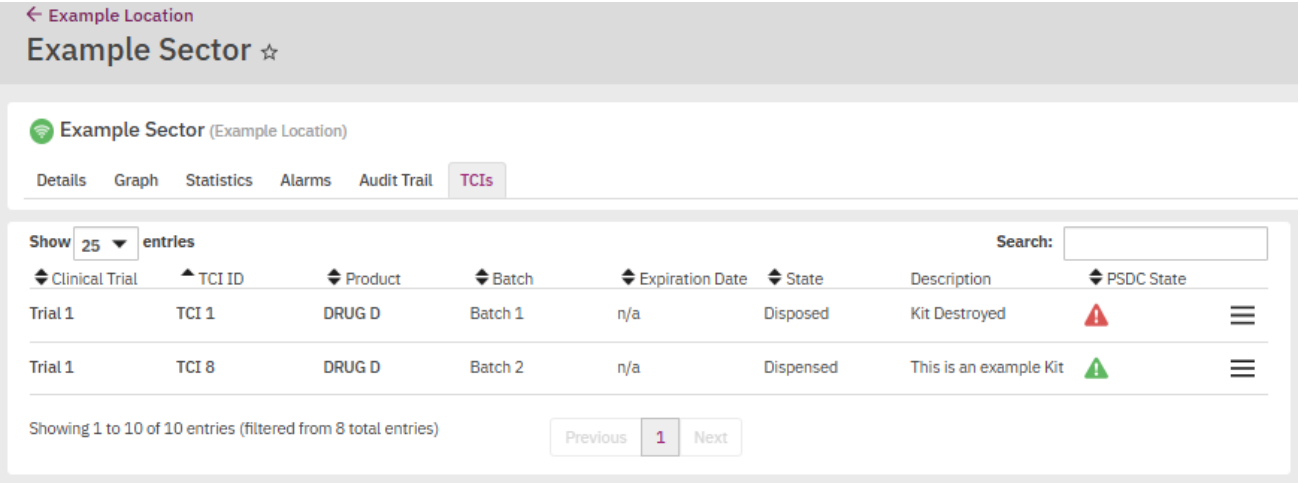
In his tab, The audit trail provides records for relevant actions performed within the sector. It documents both user-initiated and system-initiated activities, capturing what action was performed and when it occurred. This provides transparent traceability of system behavior and user interactions.

api#system-handler is a technical system user that appears in the audit trail to represent actions performed automatically by the system. Entries associated with this user indicate background processes or scheduled tasks that are executed without direct human interaction. This ensures that system-initiated activities are transparently logged and can be clearly distinguished from actions performed by named end users.

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TCIs Tab

The TCI tab within the Sector View provides an overview of all *Temperature-Controlled Items* associated currently or previously with the selected sector.



24: Sector - TCI Tab

Refer to the *TCIs (Legacy)* section for a full description.

Page Actions

You can select one of the following actions from this page:

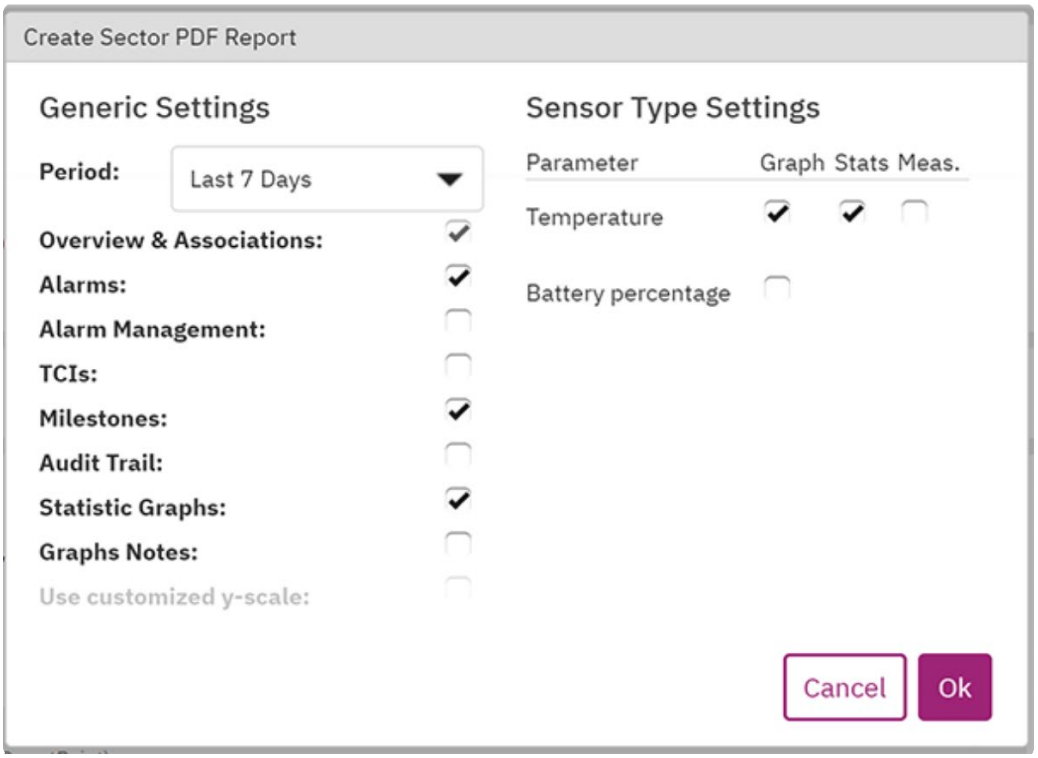
- Add a Milestone
- Generate a PDF
- Modify a sector



To create a customized sector report, click on the **PDF** button:

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When the pop-up window appears, you can choose from several report settings.



Create Sector

For a step-by-step guide to how to set up a new sector please follow the steps below.

1. From the Location page, click **Create Sector**.

   Create Sector page displays:



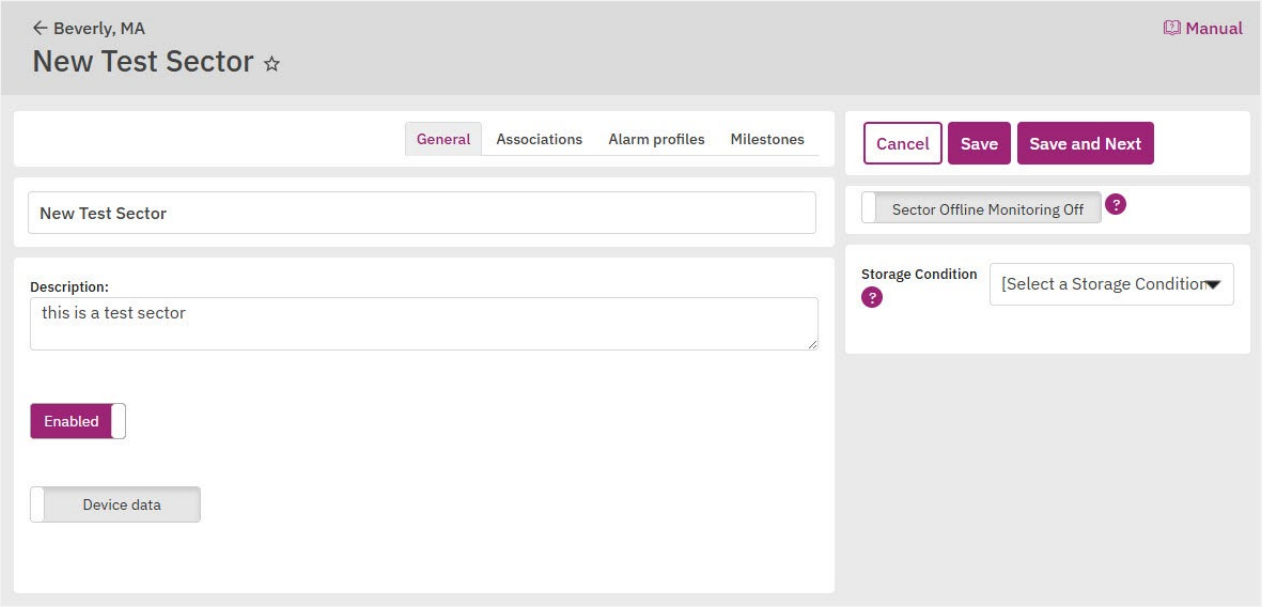
2. Provide name and description for your sector.
3. Use the **Data source** field to indicate whether the sector will use the device (default) or manual data.

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4. Click **OK**.

Please be advised that once the sector is set to Manual data, this action is irreversible.

The next screen displays where you can provide additional information for your sector:

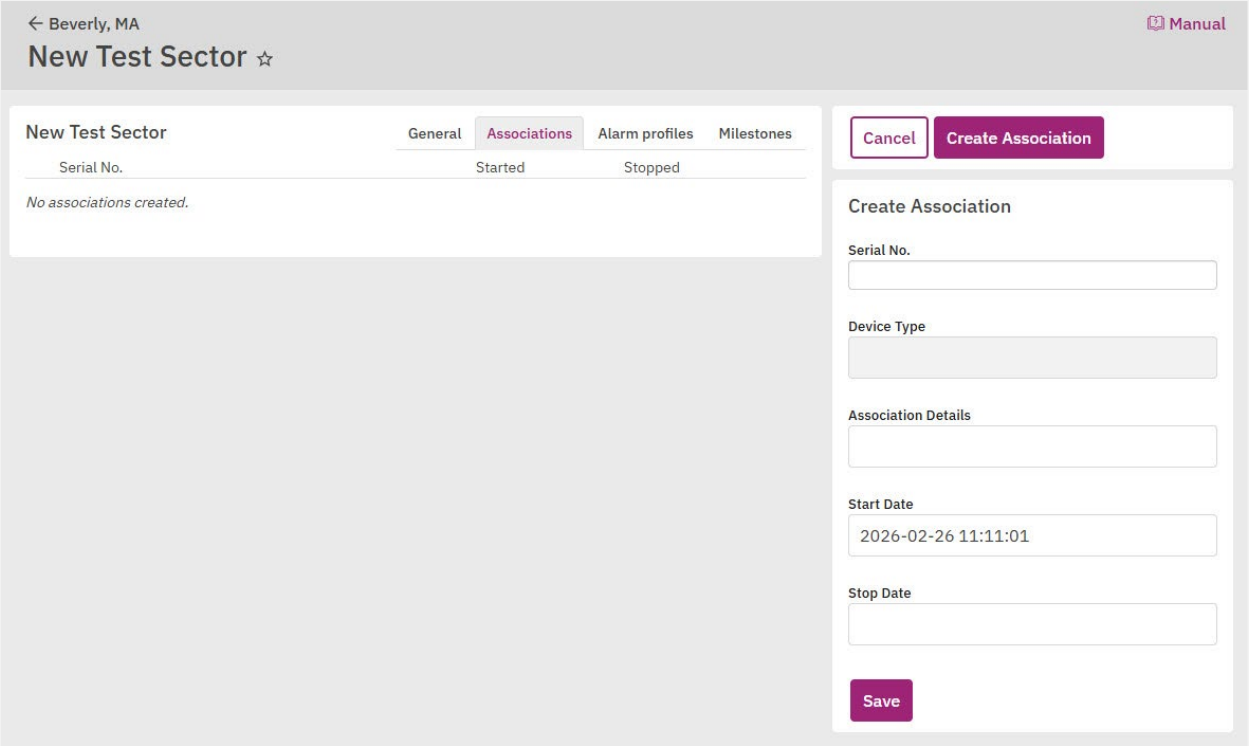


1. From the **Site Settings/Storage Conditions**, select a predefined storage condition from the list.

Storage conditions are for information only and do not impact on the alarm profile.

2. In the **Associations** tab, click **Create Association** to create an association.

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a) In the **Serial No./Name**. field, enter your device for the sector.
b) Select Device Type
c) Add Association Details.
d) Add the Start Date and the Stop Date for your device.

If the devices was started prior to the association, a start date for the association has to be set accordingly.

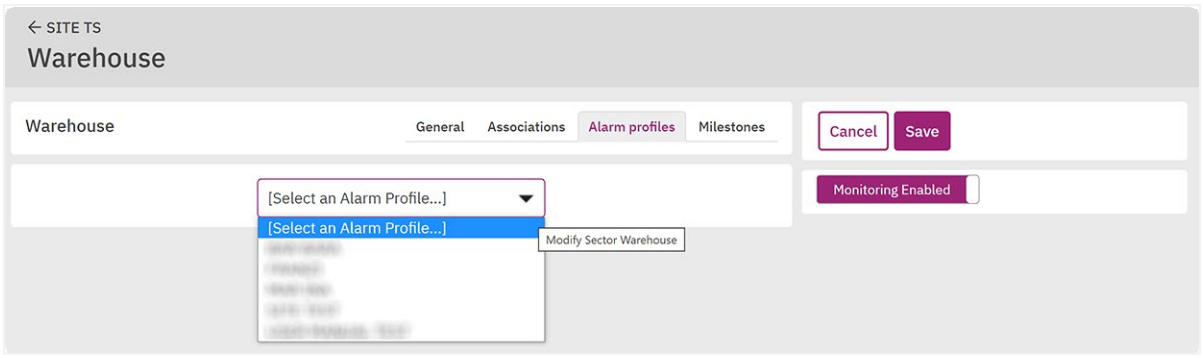
e) Click **Save**.
f) Repeat this process for additional devices.

3. In the **Alarm profiles** tab select an Alarm profile.

Before adding an alarm profile to the sector, make sure you have created a profile with appropriate alarm rules. Refer to the Alarm Profiles section of this document to learn more about Alarm profiles.

a) Click on the **Monitoring Disabled/Enabled** button to enable alarm monitoring and **select an AlarmProfile** from the dropdown list:

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b) Click **Save** to save your changes.

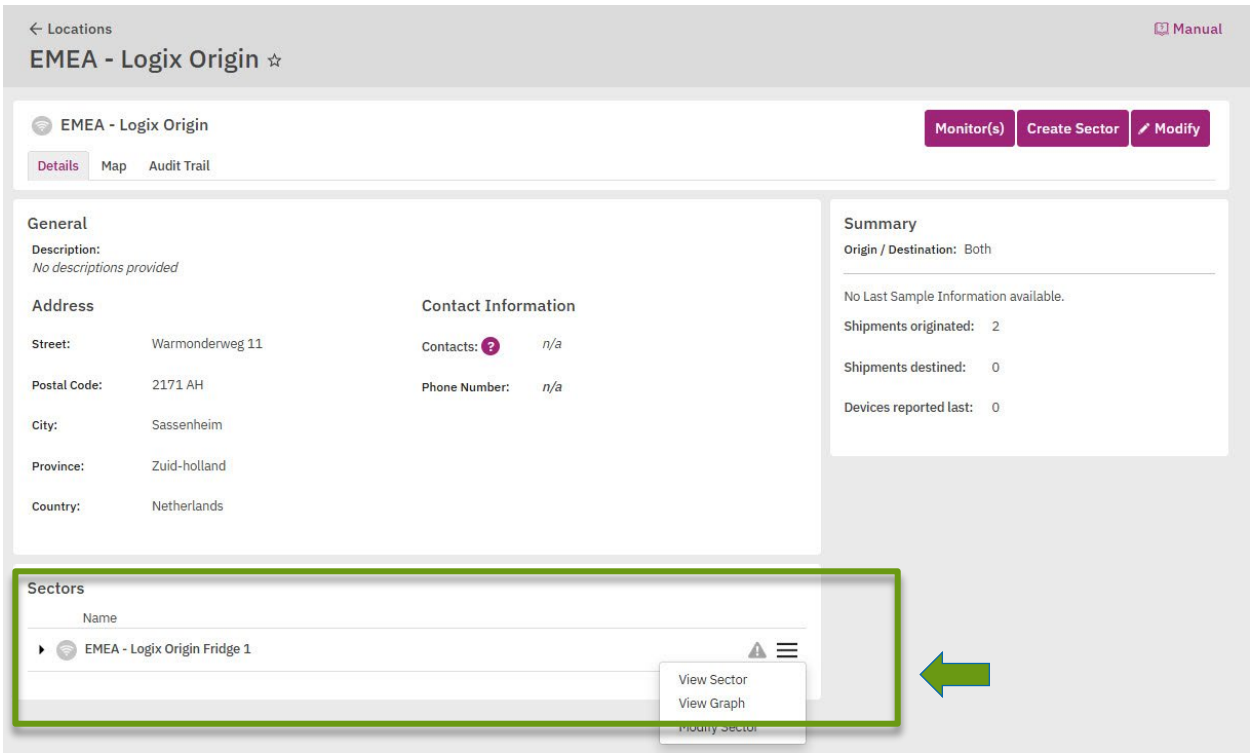
Clicking on **Monitoring Enabled** when it's already activated will remove the currently set up profile from the sector.

Modify Mode

After the sector is created, user can make modifications to the sector.

To modify your sector by accessing the Modify screen in one of the following ways:

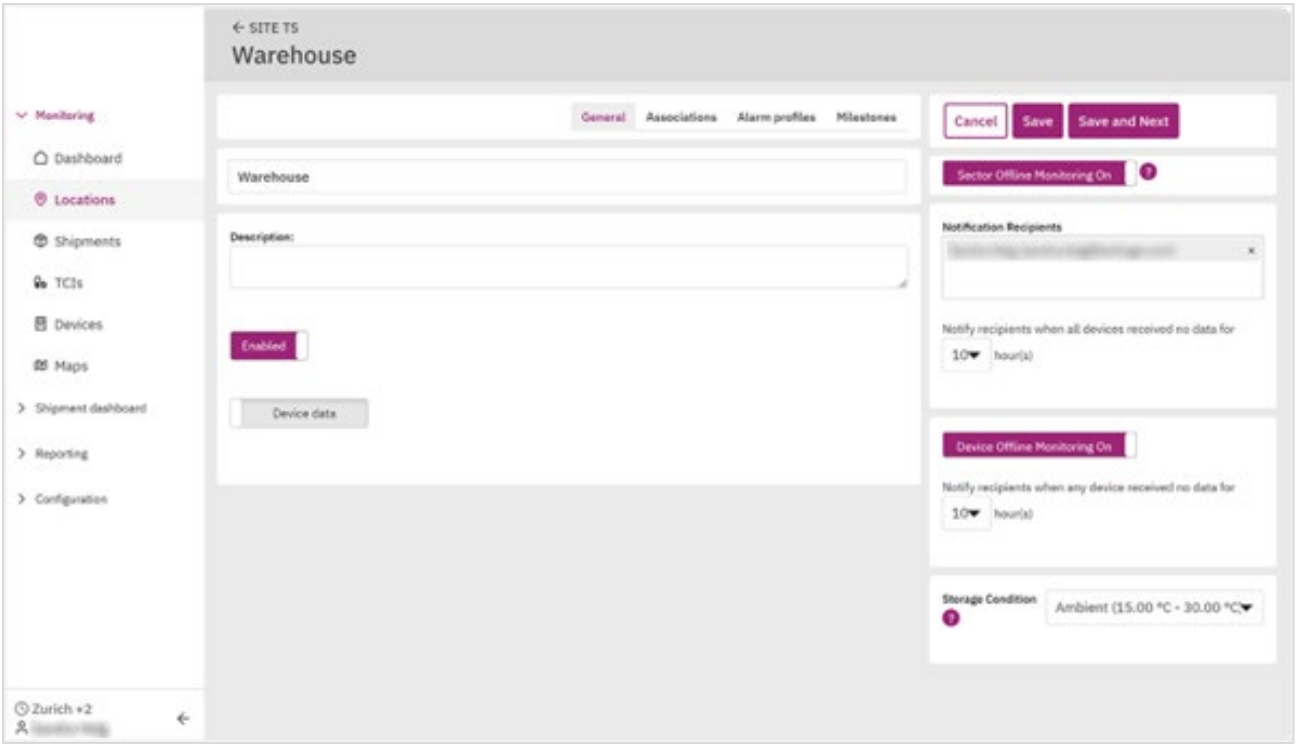
- From the Location Page in the **Sector** section, select a sector you want to modify, click on ☰ Action Menu icon and then select **Modify Sector**:



- From the Sector page, click **Modify**.

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The Sector displays in modify mode:



25: Sector – Modify Mode

You can modify information related to this sector.

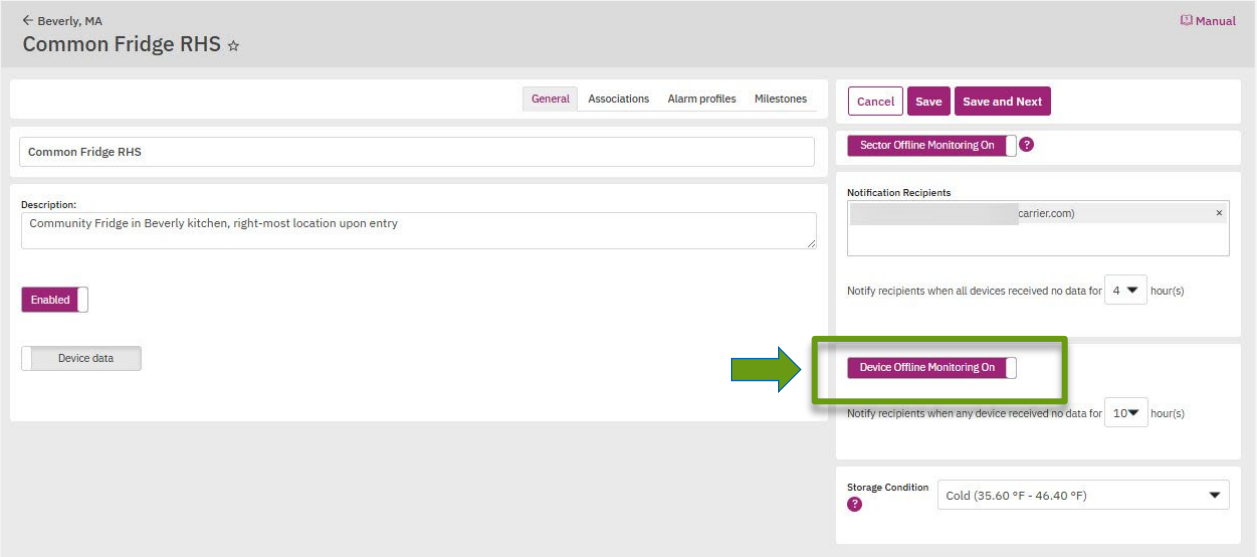
Enable/Disable Sector Device Offline Monitoring

When sector offline monitoring is enabled SmartView will send email notifications to SmartView users. This functionality can be configured for each sector, including time interval and recipients.

To configure sector notifications, complete the following steps:

1. On the Sector page, click **+Milestones**.
2. On the next screen, in **General** tab, toggle **Sector Offline Monitoring ON/OFF** to turn on or off notifications for the devices in this sector.

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26: Sector – Add Milestones

Users have to set up these notifications for their sectors to benefit from this functionality.

If it is ON, the notification will be sent to the contact users configured in the **Contact** field of the **Location > Details** tab. Refer to figure *10: Location Page* on page *43*.

3. Click **Save.**

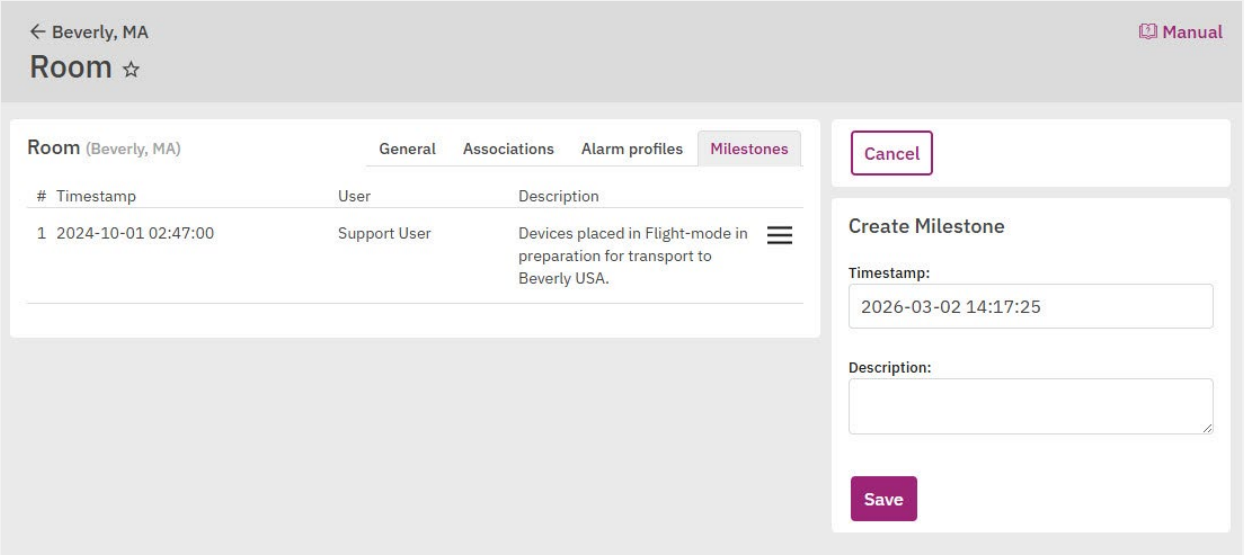
Sector Milestones

SmartView enables users to record important details associated with a particular sector by providing the option to add milestones.

To create a milestone, complete the following steps:

1. From the Location page, select a sector where you would like to add a milestone.
2. In the top-right corner of the Sector page, click **+Milestone**.

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27: Sector – Milestones Tab

3. Select the date and time of the milestone in the date field
4. Provide a short description of the milestone.
5. Click **Save** to save your milestone.

   The new milestone will be displayed on the left side of the screen above and also in the **Milestones** section of the Sector **General** tab.

   You can view your milestones on both the sector graph and the PDF report.

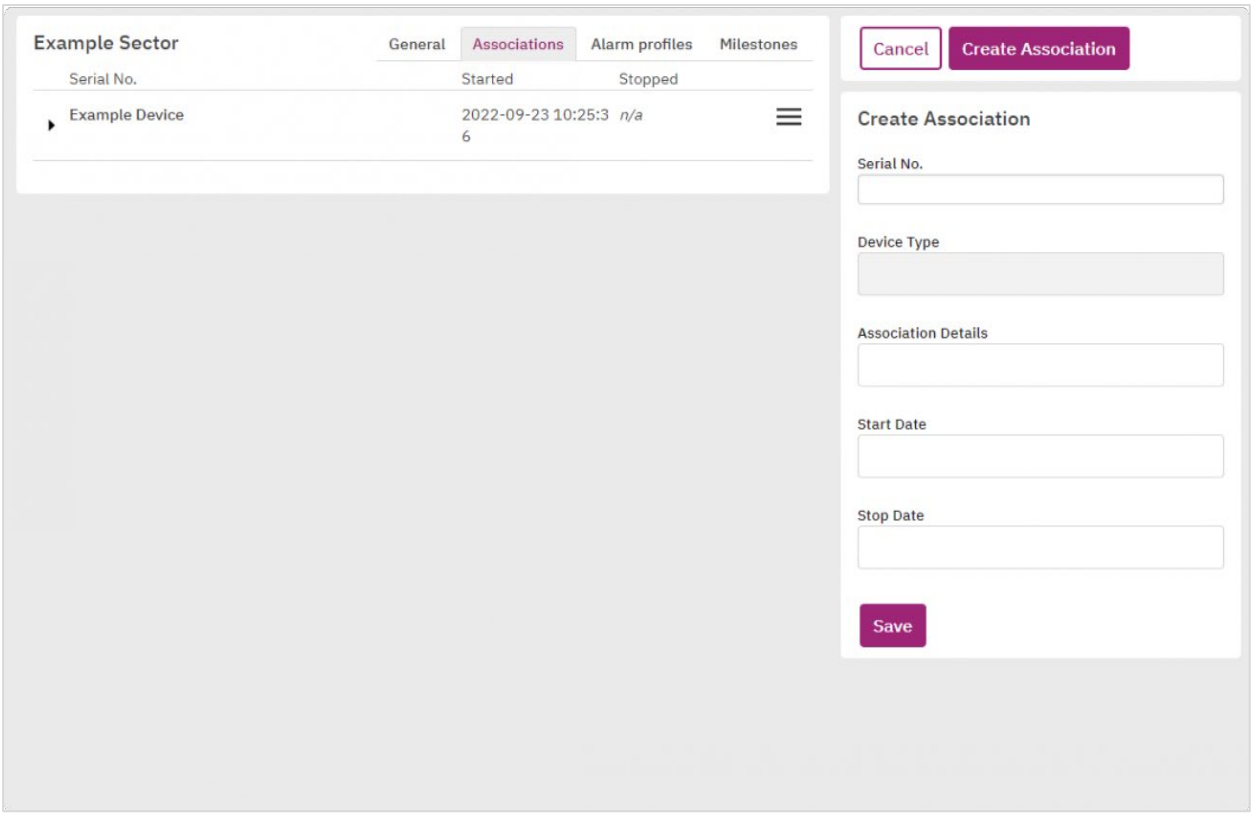
Assign a Device to Another Sector

A device can be assigned only to a single sector. To assign a device to another sector, please follow the steps below:

1. Open Sector in the Modify mode.
2. Set an end date for the Association.
3. Select the **Associations** tab.

   In this section, associations can be modified. The currently associated devices can be edited by clicking the tribar on the right side of the line, which provides the option to set an end date for the association.

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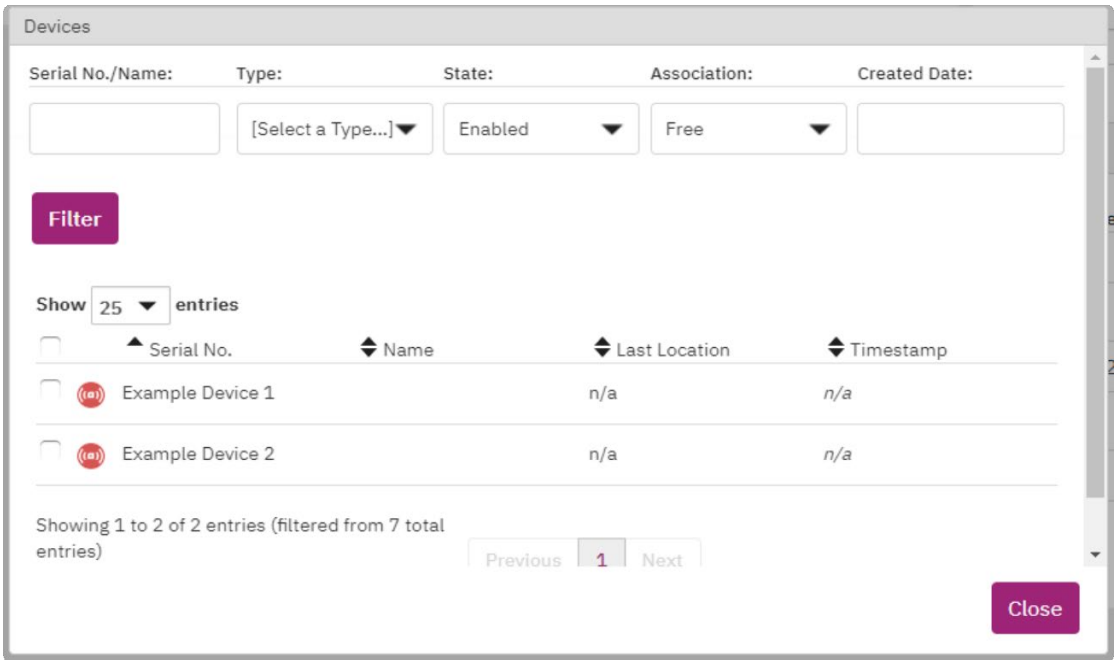
4. Access the new sector.

   In the **Sectors** section, select a sector and then click **Modify Sector** in the selection menu, or click on **Modify** button on the top right.

5. Set a New Association.

   a) Select **Associations** tab and then click on the **Create Association** button.
   b) In the **Serial No./Name** field, enter the device for the sector.

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c) Select or modify the start date and click on **Save**.

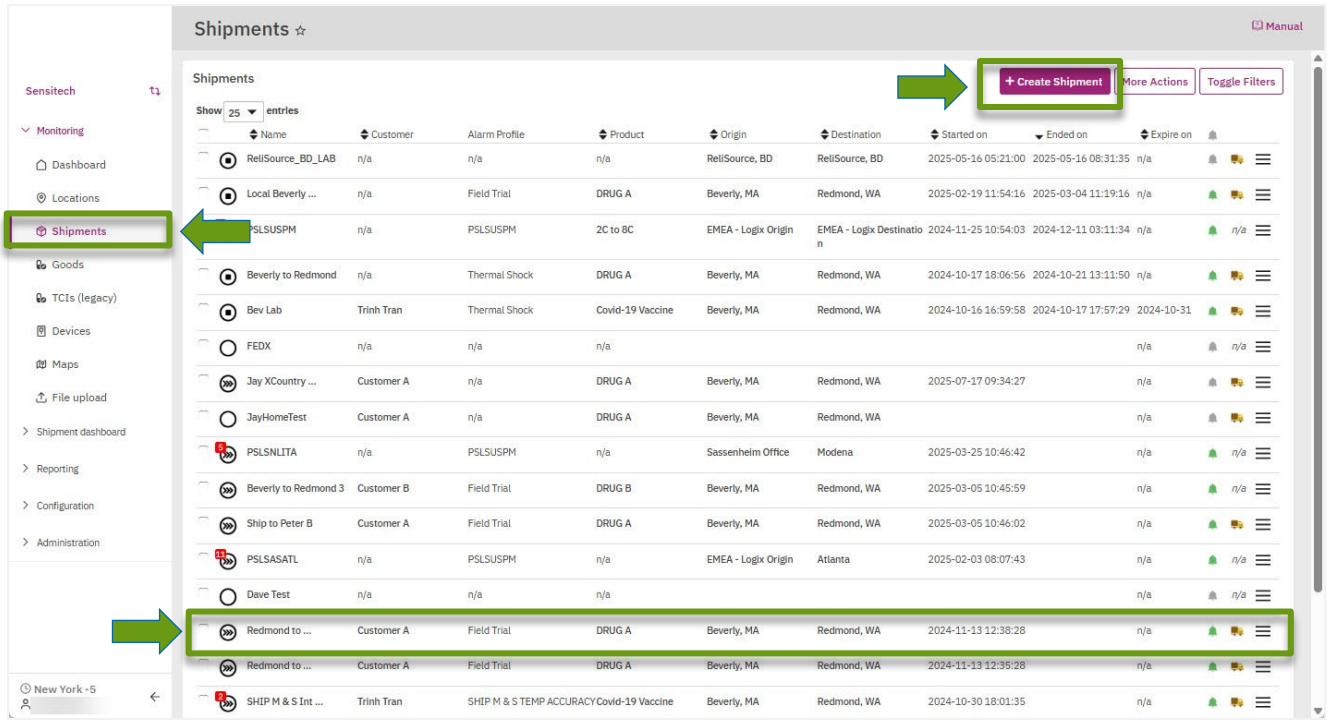
Shipments

Shipment refers to moving a package from A to B by various transport methods. Devices that monitor the package are tracked through ShipmentAssociations.

Shipment List

To view shipment list, select **Monitoring > Shipments**. A list of Shipments displays:

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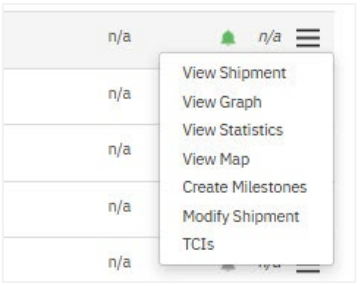


28: Monitoring > Shipments

From the shipment list, you can do the following:

- Click on a shipment to view the details of the shipment.
- Select a shipment, then choose an appropriate action from the ☰ Actions Menu on the right corresponding to that shipment:

  - View Shipment
  - View Graph
  - View Statistics
  - View Map
  - Create Milestones
  - Modify Shipment
  - TCIs



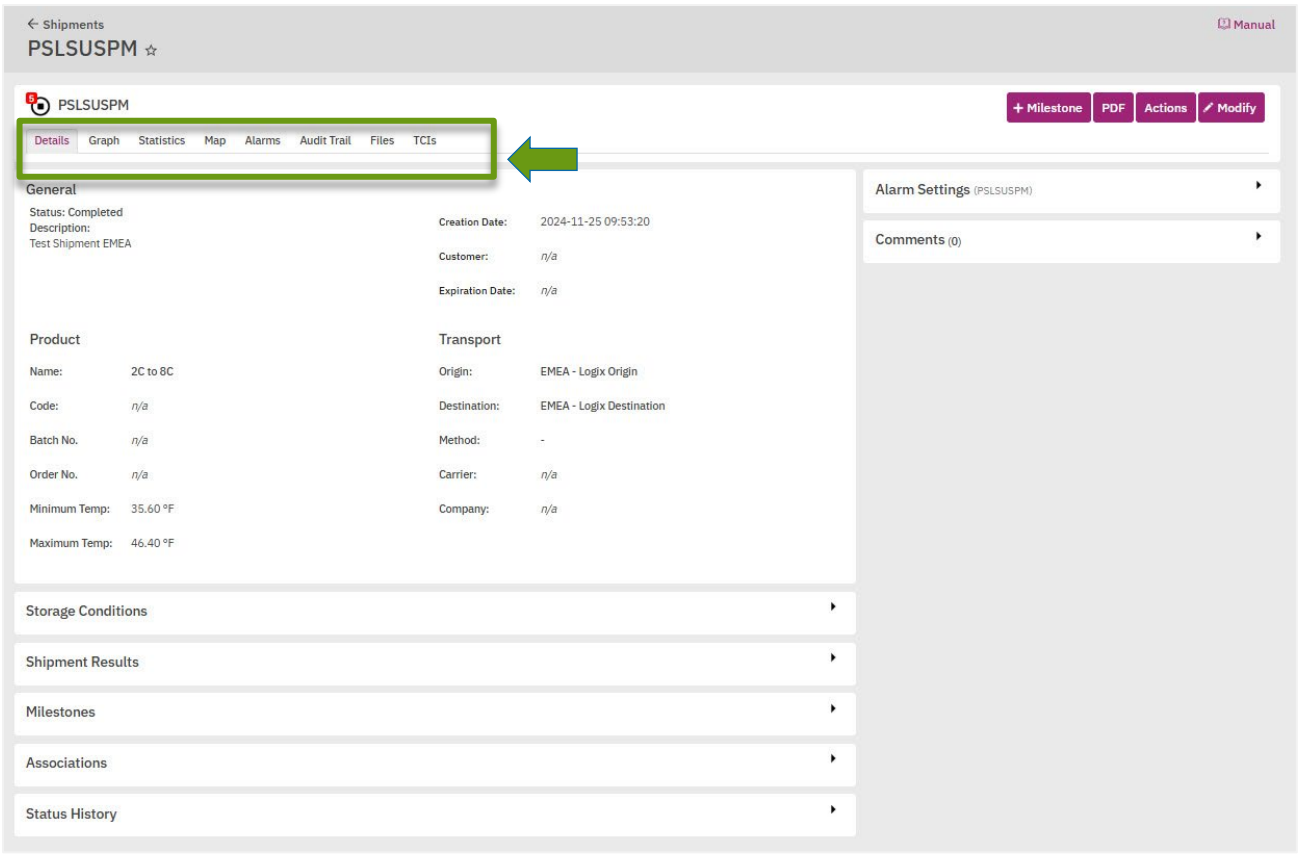
Shipment options are accessible based on the user's permissions.

- Create a new Location by clicking on the **Create Location** button on the top-right corner of the screen.

Shipment Page

Shipment page displays details about a shipment. From the Shipment List page, click on the shipment name to view the Shipment page:

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29: Shipment Page

Shipment page has the following tabs:

- Details
- Graph
- Statistics
- Map
- Alarms
- Audit Trail
- Files
- TCIs

This section explains the Shipment page tabs and their contents.

Details Tab

To view the Details tab, click **Details**. This is the default tab when you open the shipment page.

Refer to figure *23: Shipment Page* on page 71 for information about the Shipment page.

The Details tab has the following sections:

- General

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- Storage Conditions
- Shipment Results
- Milestones
- Associations
- Alarm Settings
- Comments

General Section

In this section of the Details tab, you can edit the shipment name (Unique Shipment Identifier) and add an optional note. Select a customer from the drop-down list.

- **Transport:** Enter origin, destination, trip ID, transport method, company, and carrier. Use drop-down menus for origin, destination, and transport method. If "Air" is selected, choose an air carrier; otherwise, manually enter the carrier's name.
- **Product:** Choose a predefined product for shipment. If available, the product code will auto-fill. You can also input batch and order numbers as needed.

Storage Conditions Section

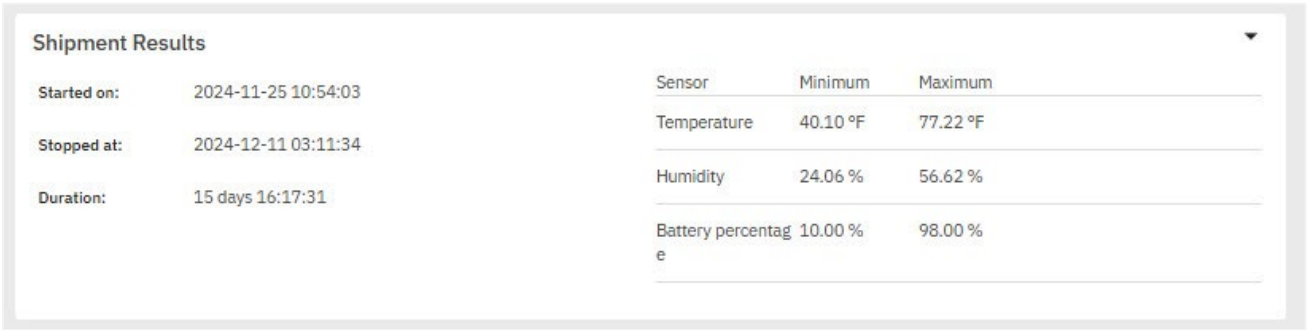
This section displays storage conditions. Storage conditions can be defined in the Admin settings:



30: Shipment Page – Details Tab (Storage Conditions Section)

Shipment Results Section

This section displays shipment results including the start and end dates, shipment duration, and sensor information:



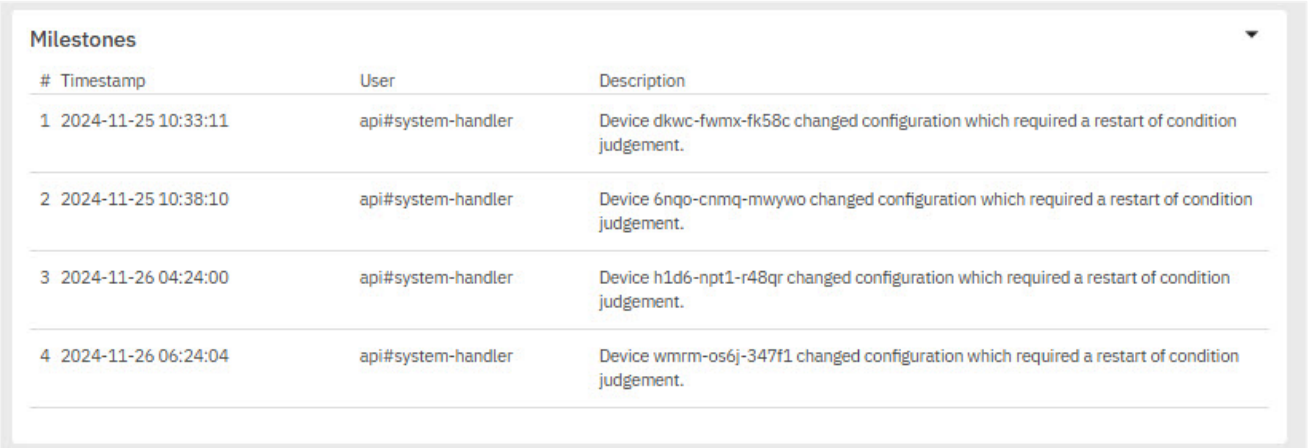
31: Shipment Page – Details Tab (Shipment Results Section)

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Milestones Section

A **Milestone** serves as a designated point within the process that denotes the occurrence of a significant event. For example, in the context of a shipment, a milestone may indicate when the shipment reaches an intermediate station or when a sensor is connected or disconnected.

This section presents the milestones established for shipment:



32: Shipment Page – Details Tab (Milestones Section)

A milestone is automatically added to a shipment when a sensor is connected or disconnected.

Associations Section

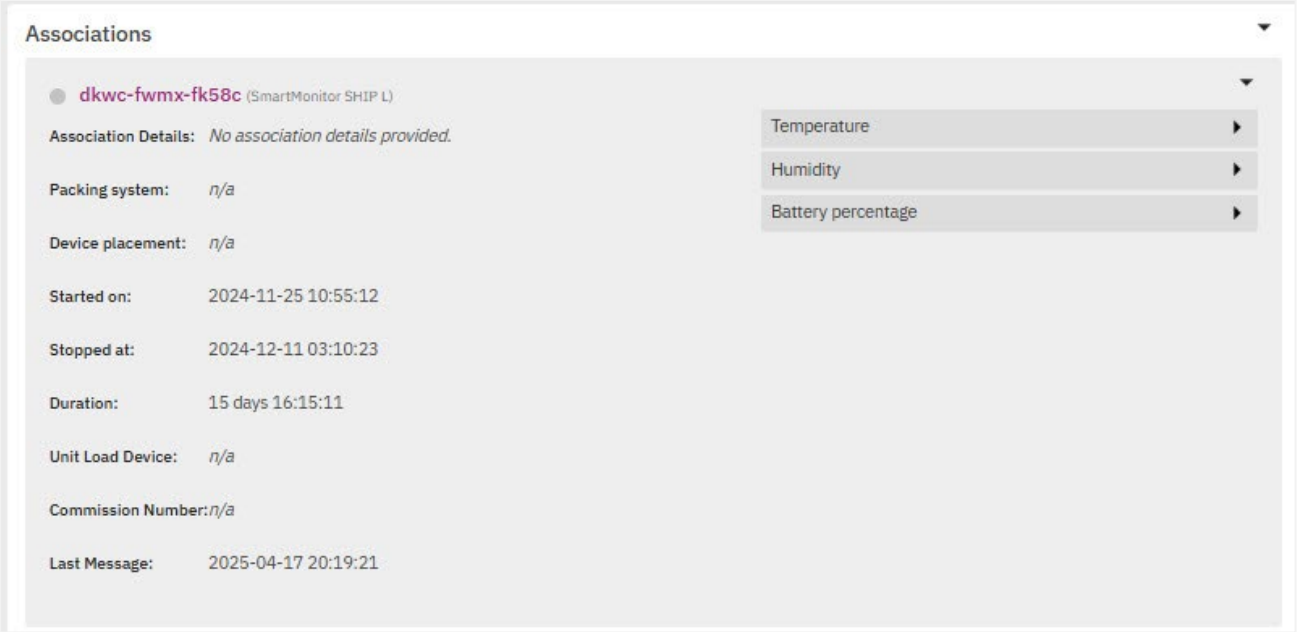
This section displays associations(devices) connected to shipment:



33: Shipment Page – Details Tab (Associations Section)

Click to expand the association to see the details of the device:

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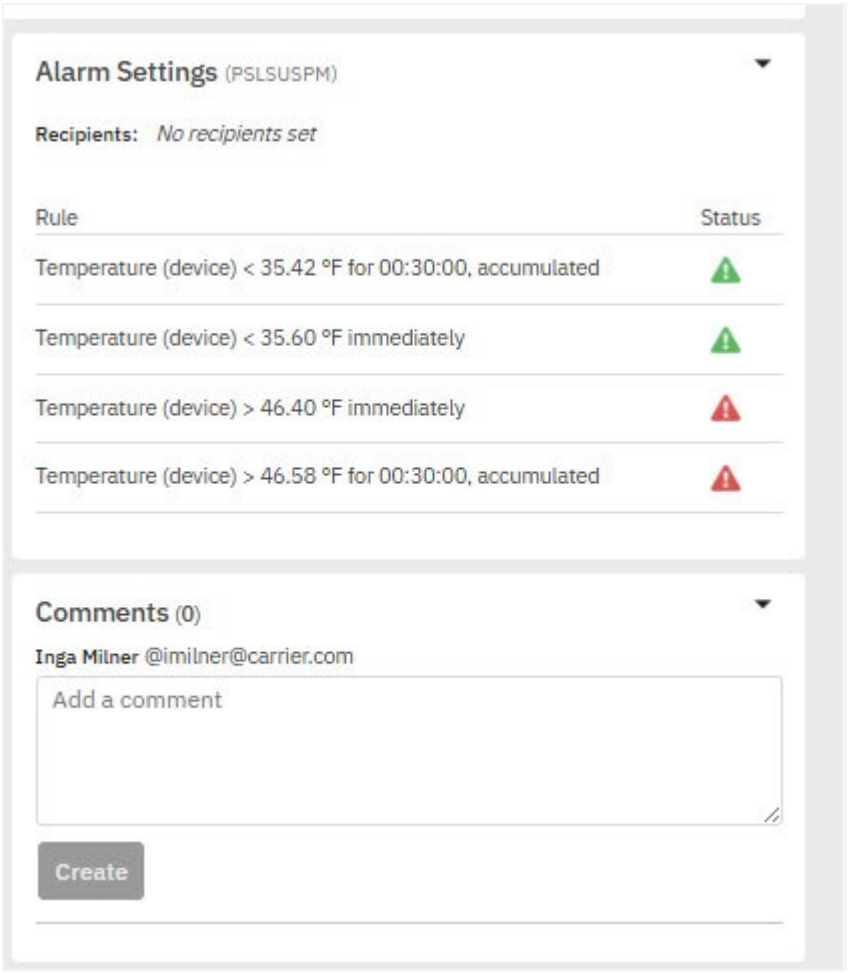
34: Shipment Page – Details Tab (Associations Section Expanded)

Alarm Settings Section

Alarm Settings section is located on the top-right of the **Details** tab. Refer to figure *19: Shipment Page* on page 57.

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Expand the section to view alarm settings for the devices associated with the shipment:



35: Shipment Page – Details Tab (Alarm Settings and Comments Sections)

Comments Section

Comments section is located on the top-right of the Shipment **Details** tab. Refer to figure *25: Shipment Page – Details Tab (Alarm Settings and Comments Sections* on page *72*.

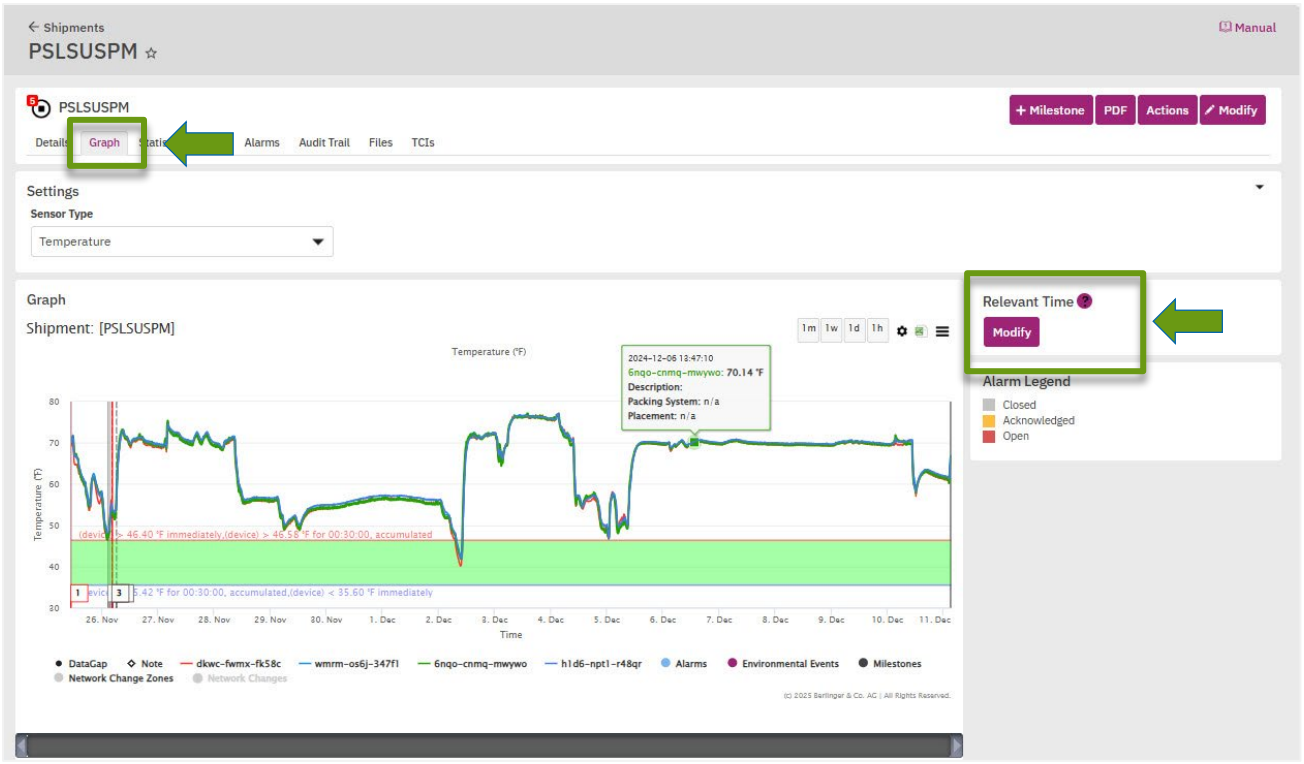
Expand the section to add general comments to a shipment:

Graph Tab

Shipment Graph tab displays a graph associated with the shipment. You can view the graph with all associated devices enabled. You can view a particular sensor or a time frame on the graph.

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Click on the **Graph** to display the Graph tab.



36: Shipment – Graph Tab

For more information about graphs in SmartView, please refer to *Graphs* section in Common Elements in SmartView.

Shipment Relevant Time

Within the graph tab, you can modify the Relevant Time by clicking on **Modify** in the Relevant Time section of the tab.

You may adjust (without deleting or altering) the relevant time associated with your shipment to ensure that only pertinent information appears in the graph.

For example, if your shipment has reached its destination and the data logger was removed from the product and taken into an office, but the device was not stopped immediately, you can update the timing accordingly.

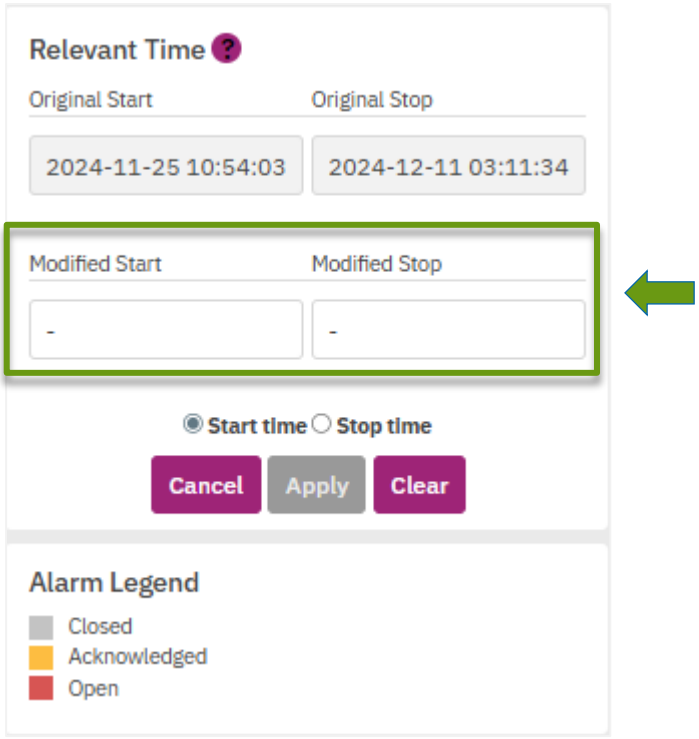
When modifying relevant time may affect the alarm information.

1. In the **Relevant Time?** Section of the **Graph** tab, click **Modify**

   The System display a pop-up asking you to confirm that you want to modify shipment relevant time.

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2. Click **OK** to confirm. The following screen displays:



37: Shipment – Graph Tab (Relevant Time Section)

3. In the **Modified Start** or **Modified Stop** enter the new time and then select **Start Time** or **Stop Time** option.

The selected times have to be within the Start/Stop times of the shipment.

After you have chosen the time, as shown in the following image, the screen will show grey colored background for the trimmed part of the data due to the modification.

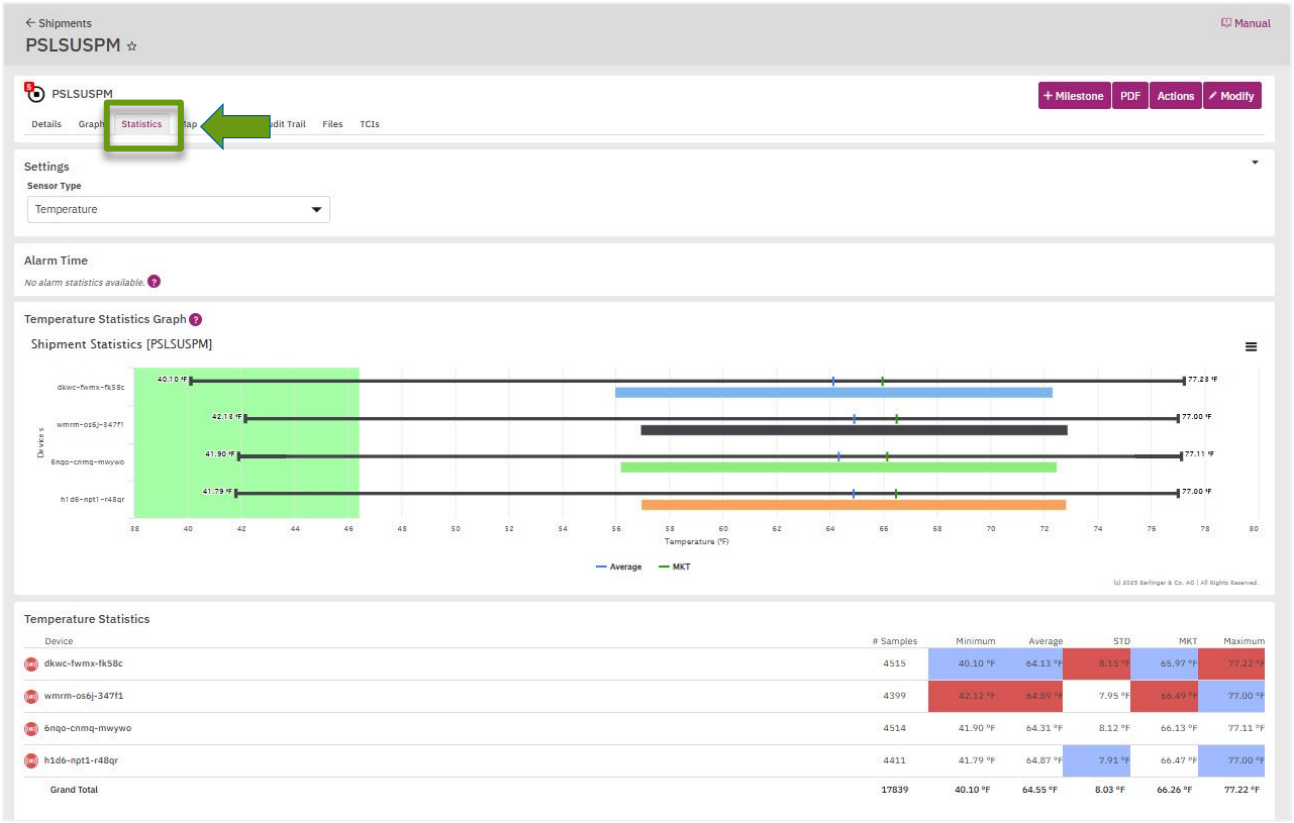
4. Click **Apply**.

- Click **Clear** to clear your changes.
- Click **Cancel** to return to the original graph screen.

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Statistics Tab

The Statistics tab displays statistics specifically related to the shipment. This includes data and metrics gathered during the entire shipment process. By clicking on the **Statistics** tab, users can review and analyze shipment-specific statistical information.



38: Shipment – Statistics Tab

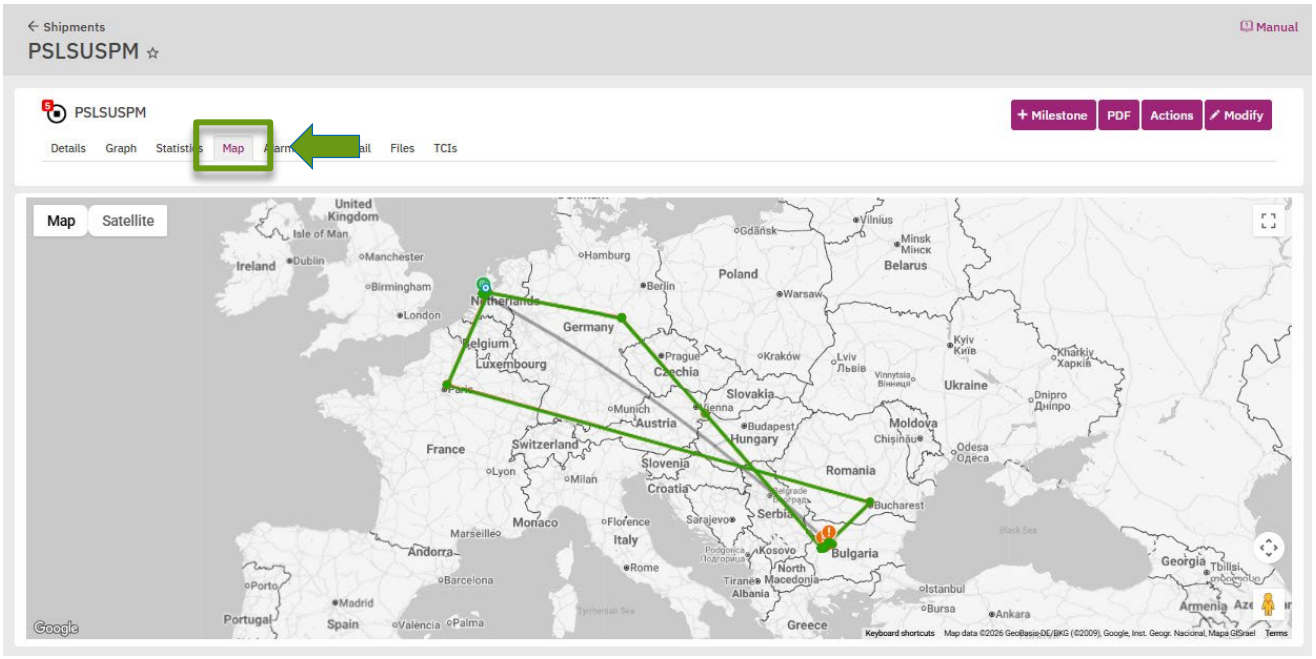
Refer to the *Statistics* section in this document to learn more about statistics in SmartView.

Map Tab

The Shipment Map visually displays the route your goods take from origin to destination. You can track the shipment's path in real time or review it later, observe key stops and any changes in the route, and see relevant device locations and events. This tab helps you monitor and better understand the movement of your shipments.

Click on the **Map** to display the Map tab:

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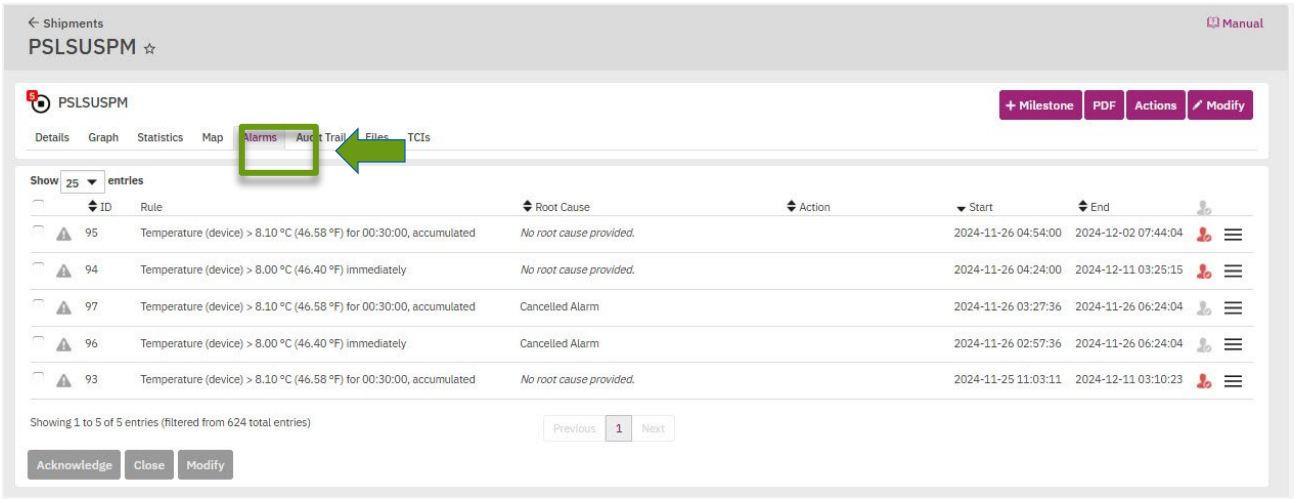
39: Shipment – Map Tab

Refer to the *Map* section in this document to learn more about maps in SmartView.

Alarms Tab

The Alarms section delivers real-time alerts about your shipments, helping you quickly address route changes, temperature issues, or other key events to support proactive management and better supply chain visibility.

Click on the **Alarms** to display the Alarms tab for the shipment:



40: Shipments – Alarms Tab

Select an alarm and then from the ☰ Actions Menu, select one of the following options:

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- View Excursion
- View on Graph
- Acknowledge Alarm
- Modify Alarm

You can select multiple alarms and then select one of the following options listed at the bottom of the page:



Acknowledge Alarm

Alarms are marked with the  icon. To acknowledge an Alarm, select a single or multiple alarms from the Alarm list and then click **Close** button at the bottom of the list.

Confirmation message will ask you to confirm alarm confirmation. Click **OK** to confirm.

When an excursion is acknowledged, SmartView emails recipients with details on who confirmed it, who received updates, the excursion's description, root cause, and actions taken. No further notifications are sent for that incident, as it is considered resolved.

Close Alarm

An alarm can be closed after the situation has been resolved and corrective measures have been implemented. The alarm must first be acknowledged by the user before it can be closed. Closing an alarm serves to record that the situation was handled appropriately.

Alarms must remain open while the situation persists.

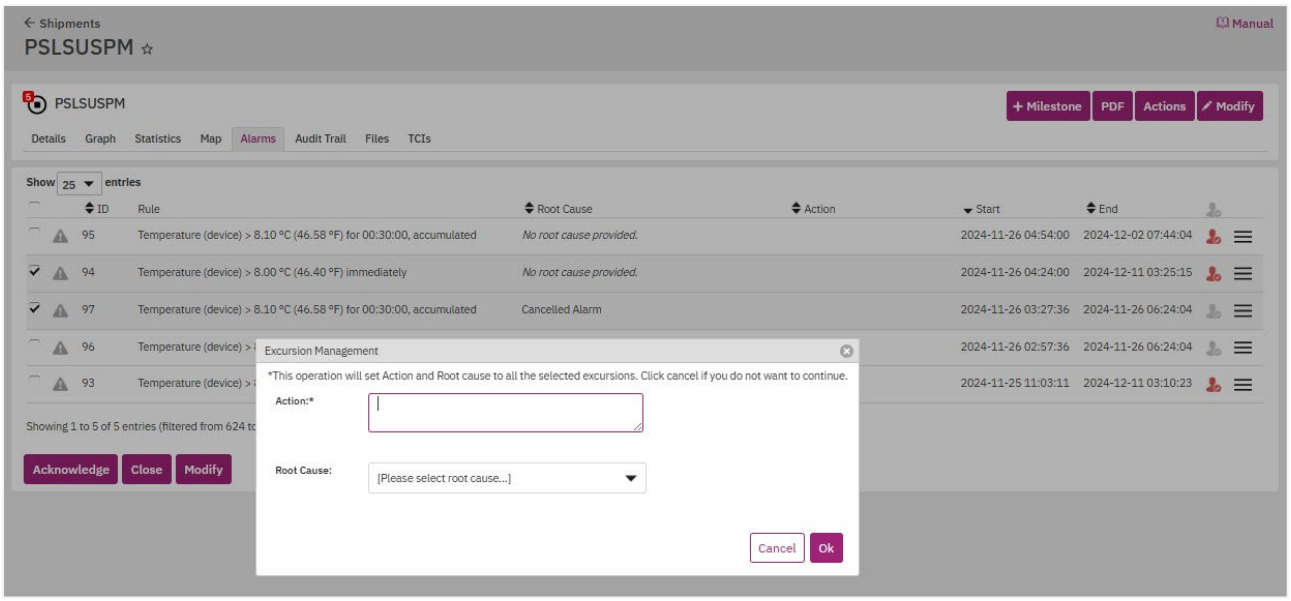
To close an Alarm, select a single or multiple alarms from the Alarm list and then click **Close** button at the bottom of the list:

Modify Alarm

To modify alarm, select an alarm or multiple alarms from the list and then click the **Modify** button at the bottom of the screen.

Alarm page opens in the modify mode where you can make add corrective action or add root cause:

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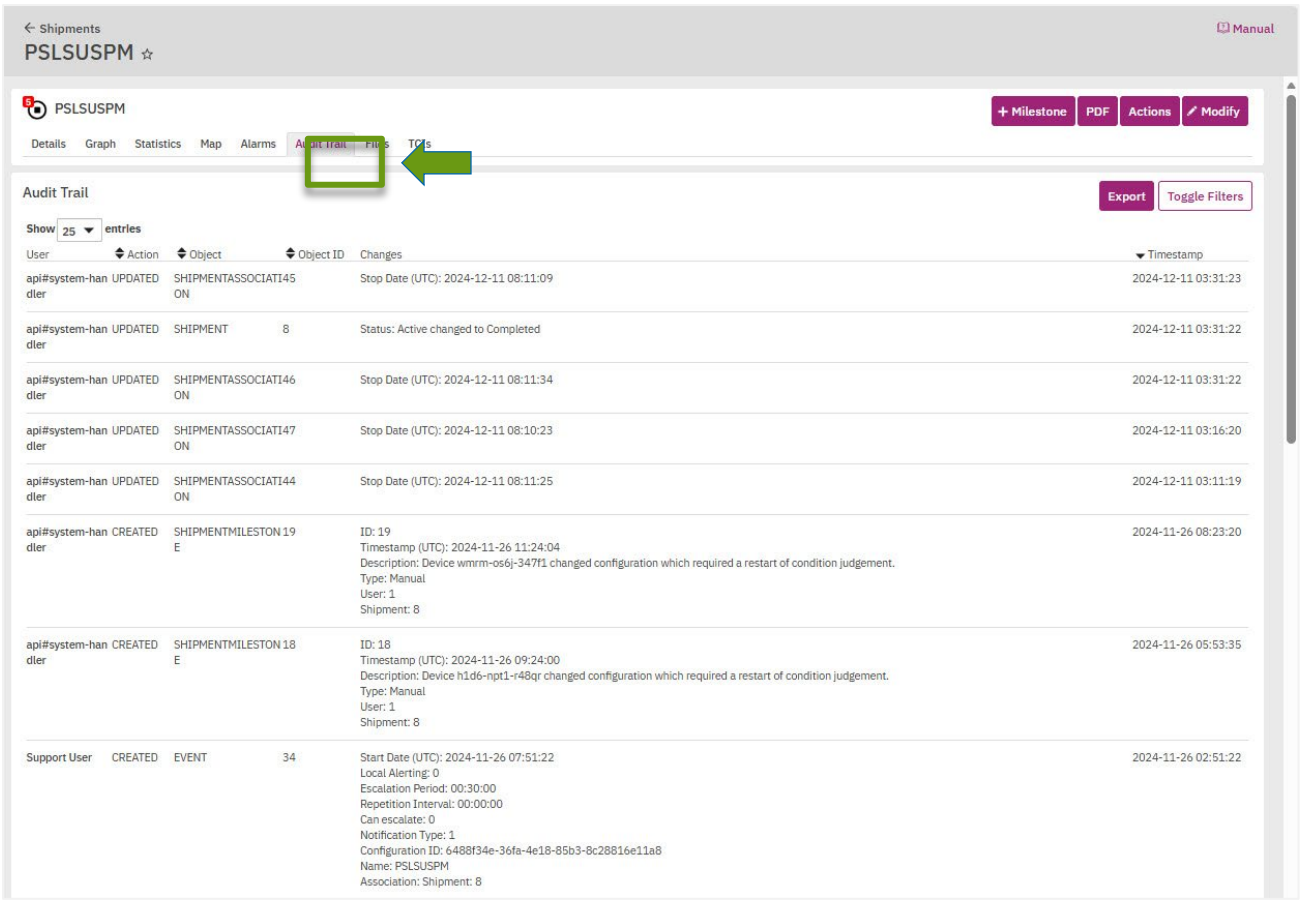
41: Shipment Page – Alarms – Modify

Audit Trail Tab

The Audit Trail serves to monitor and log every user action and system change related to shipment. It captures a comprehensive record of activities, including acknowledgments, alarm resolutions, and updates to data. This functionality promotes accountability and transparency by enabling both administrators and users to see which actions occurred, who performed them, and when they took place.

Click on the **Audit Trail** to display the Audit Trail tab for the shipment:

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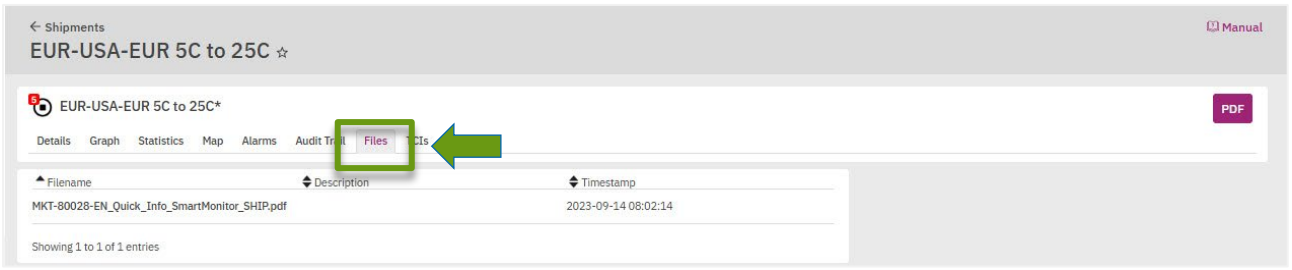
42: Shipment – Audit Trail Tab

Refer to the *Audit Trail* section in this document to learn more.

Files Tab

This section lists files that are attached to the shipment.

Click on the **Files** to display the Files tab for the shipment:



43: Shipment – Files Tab

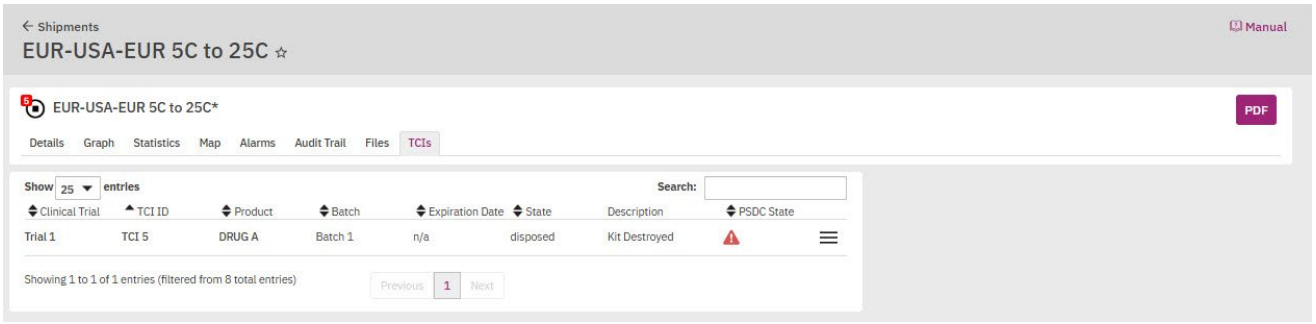
User can download a file by clicking on the file listed.

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TCIs Tab

The TCI tab appears when the system detects concurrent monitoring activities on the same device. If a shipment utilizes a template and the associated TCI is linked to that device during the shipment, the information will be displayed accordingly.

Select **TCIs** to access the TCIs tab for the shipment:



44: Shipment – TCI Tab

Users can also view TCIs for all shipments in the Monitoring > TCI. Refer to the *TCIs (Legacy)* section for more information about TCIs.

Page Actions

While viewing a shipment, the following actions are available to a user:



- Add a Milestone
- PDF
- Stop
- Modify

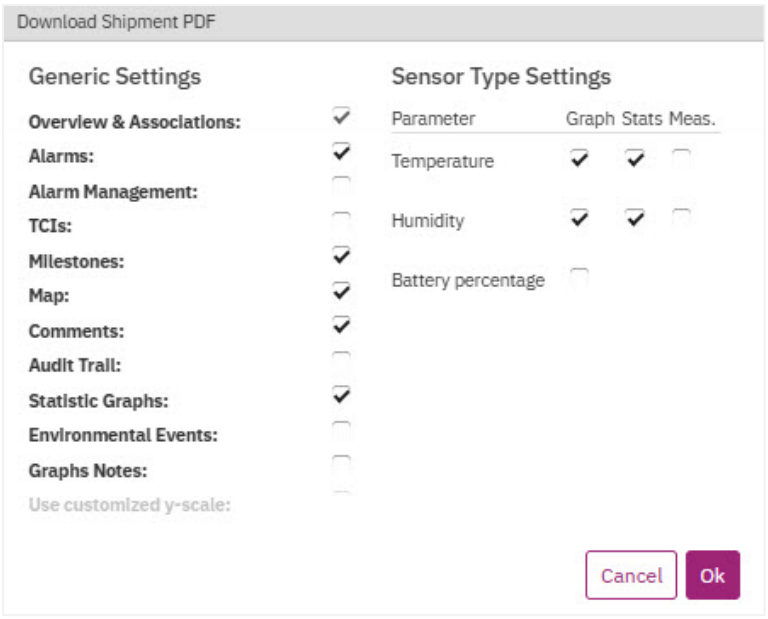
Add Milestone

Refer to the *Shipment Milestones* section to learn how to add a milestone to a shipment.

PDF

To generate a report of your shipment, click on the PDF button. The system displays a screen where you can select what you want to see in your Shipment PDF Report:

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45: Shipment PDF Report Options

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The following is an example of a Shipment PDF report:

Shipment Report: PSLSUSPM

(Completed with alarms)

Overview

Creation Date:	2024-11-25 09:53:20	Status:	Completed
Shipment:	PSLSUSPM	Timezone:	America/New_York
Customer:	n/a	Trip ID:	n/a
Duration:	15 days 16:17:31	No. Devices:	04
Started on:	2024-11-25 10:54:03	Stopped on:	2024-12-11 03:11:34
Metrics:	Temperature, Humidity, Battery percentage, GPS Coordinate		
Description:	Test Shipment EMEA		
Storage Conditions:	No Storage Conditions have been set.		

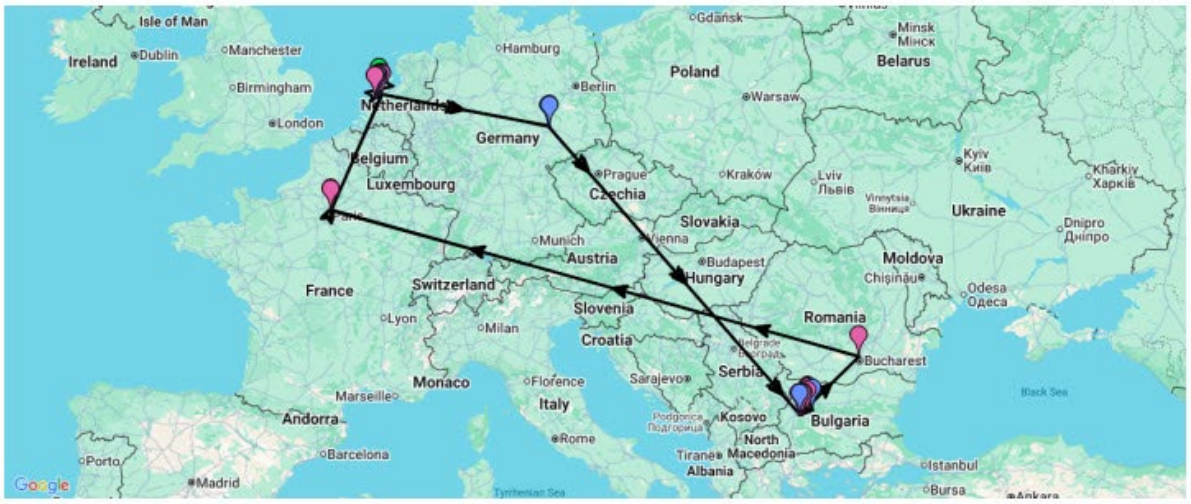
Transport (-)

Origin:	EMEA - Logix Origin	Destination:	EMEA - Logix Destination
Start Coordinates:	[52.21648,4.51773]	Stop Coordinates:	[52.42943,4.64932]
Company:	n/a	Carrier:	n/a

Product

Name:	2C to 8C	Code:	n/a
Batch Number:	n/a	Order Number:	n/a
Temperature Range:	35.60 °F | 46.40 °F	ATOR:	02:00 (hh:mm)

Map



Associations (4)

Device	Association Details	Start	Stop
dkwc-fwmx-fk58c	Details: No description provided Packing System: n/a Placement: n/a Unit Load Device: n/a Commission Number: n/a	2024-11-25 10:55:12	2024-12-11 03:10:23
wmrm-os6j-347f1	Details: No description provided Packing System: n/a Placement: n/a	2024-11-25 10:54:29	2024-12-11 03:11:09

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Stop

If a shipment is monitored with the wireless sensor(s), this shipment must be stopped to ensure only relevant data is used. When a shipment is stopped, all SmartSensors are automatically disassociated from the shipment, and a final shipment report is generated.

Shipments with wireless sensors will have a Stop button displayed in the top-right corner along with other action buttons:



Shipments assigned a Conventional device cannot be manually halted, as their start and stop times are determined solely by the uploaded Conventional device data files. Users are unable to specify these times, which are automatically sourced from the devices.

1. From the Shipment View screen, click on the **Stop** button.

   The shipment is stopped in two steps:



2. Enter the reason for stopping and then press the **Stop** button.

   To support the reliability of this procedure, the system only allows a stop-time that is close to the current system time (based on a user-defined allowed time frame).

   Note: Idle shipments can be stopped.

Modify

This option allows you to modify the existing shipment. Users can view a Shipment in the Modify mode by selecting a shipment from the Shipment List and then selecting Modify Shipment from the ☰ Action Menu.

Create Shipment

Refer to the use case for step-by-step sector set-up instructions. Before creating a shipment or entering its details, ensure you have:

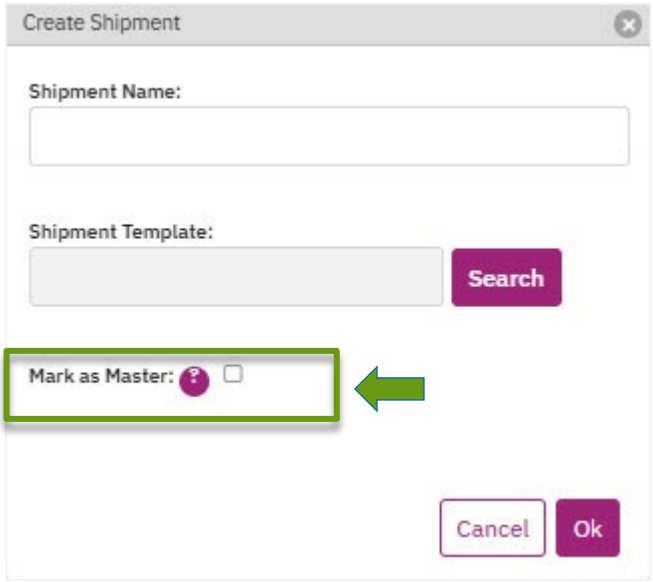
- Defined the customer,

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- Set up origin/destination locations,
- Specified the product,
- Created the air carrier subset list.

1. From the shipment overview page, click on **Create Shipment** to add your shipment.

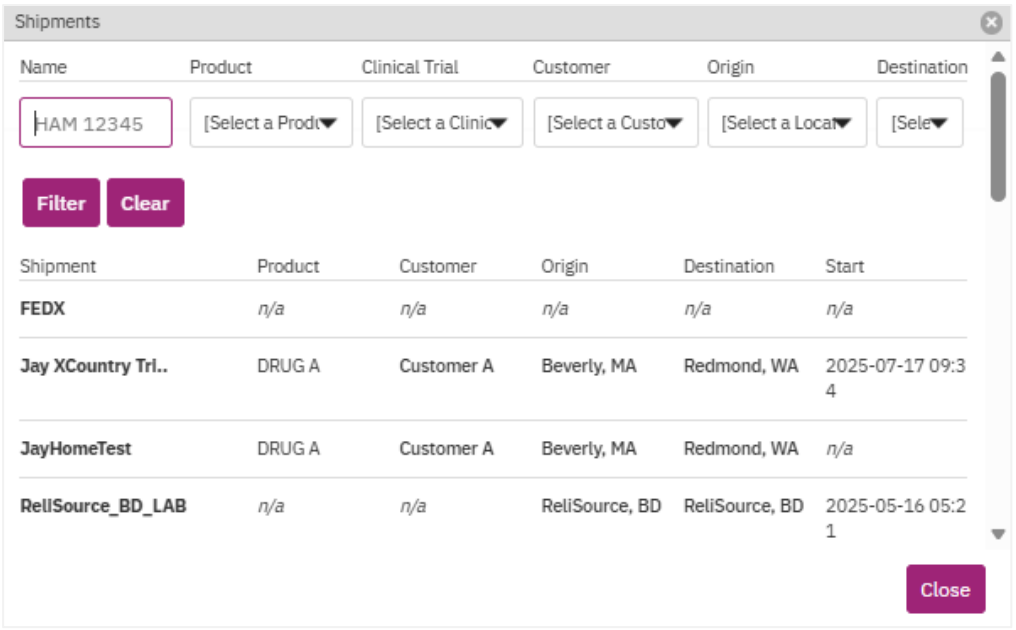
   This will open a pop-up as illustrated below, allowing you to choose a shipment ID for your shipment:



46: Create Shipment – Pop-up

2. Choose Shipment Name.
3. In the **Shipment Template** field, select Shipment Template, if available. Click Search to view the list of available shipment templates. The following screen will appear:

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47: Create Shipment – Shipment Template List

If you've made similar shipments before, you can select an existing template for your new shipment.

If you want to make this shipment as a master Shipment, select **Mark as Master** option.

Master shipment enables you to divide shipment monitoring into several sections (such as cooled and uncooled) and apply individual rules to each section.

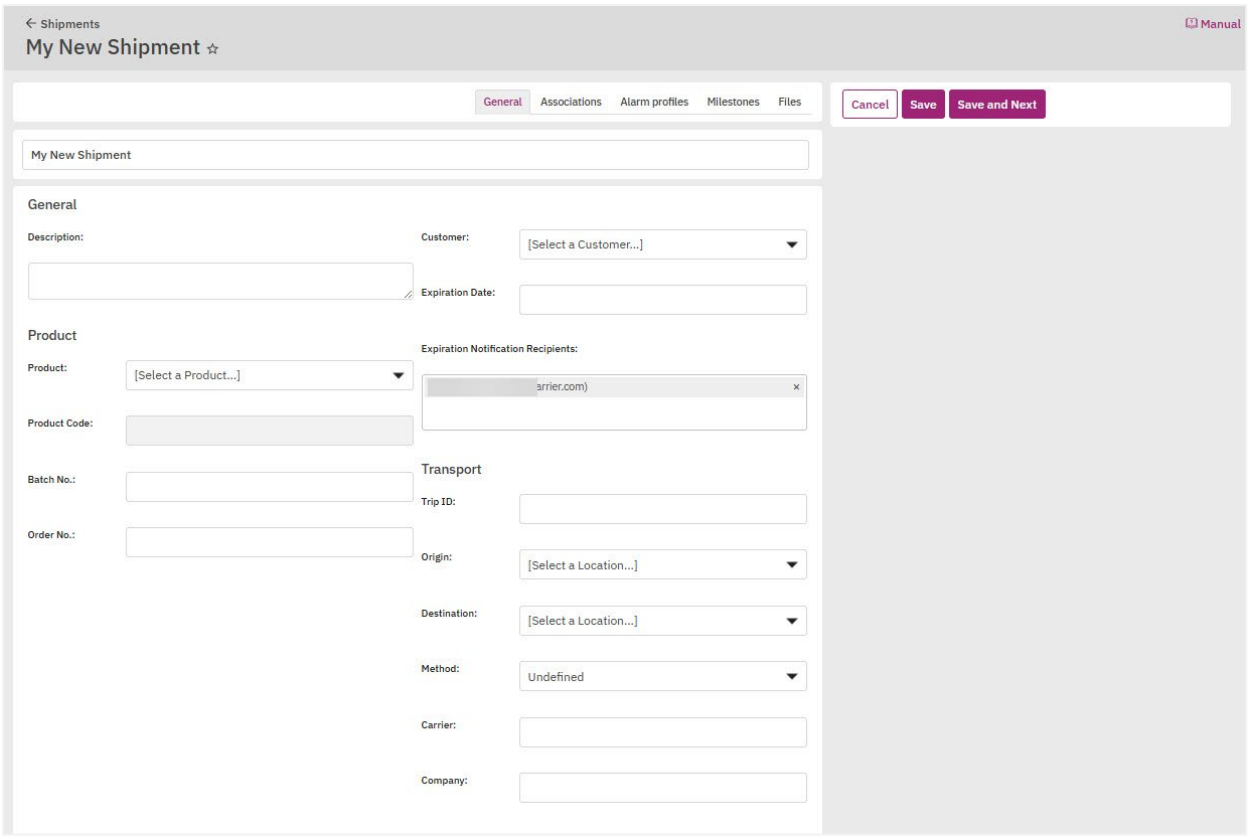
After that, you will come to the shipment details page and see that two “sub shipments” have been created automatically.

4. Click **OK**.

   You will be redirected to the screen, allowing you to choose the detailed information for your shipment.

   While creating a new shipment, you can refer to the *Shipment Page Overview* section of this document to get more information about each section on the screen.

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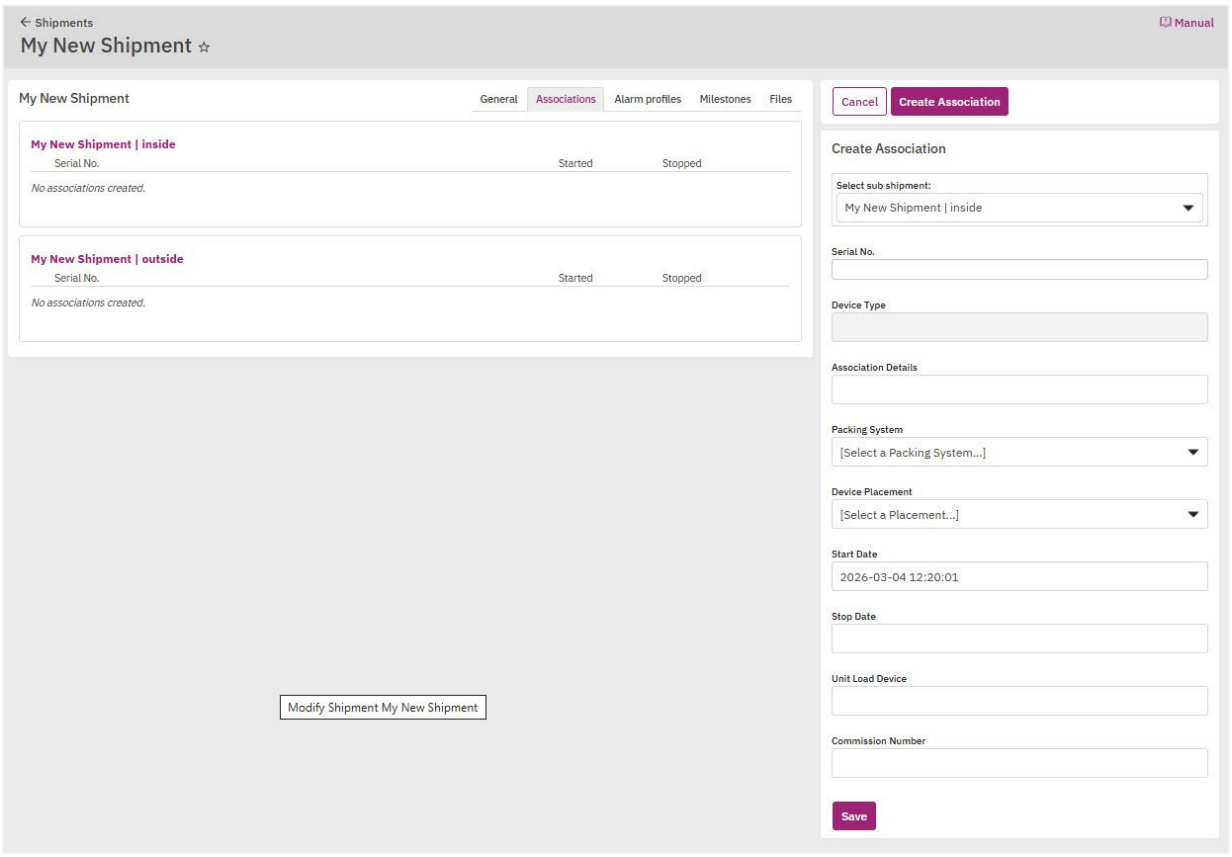
48: Create Shipment – Add General Information

In the General tab, provide information about your shipment general information.

5. In the **Association** tab, add associated devices to the shipment.

When creating a master shipment, you must assign at least two devices to this shipment – one for each sub shipment.

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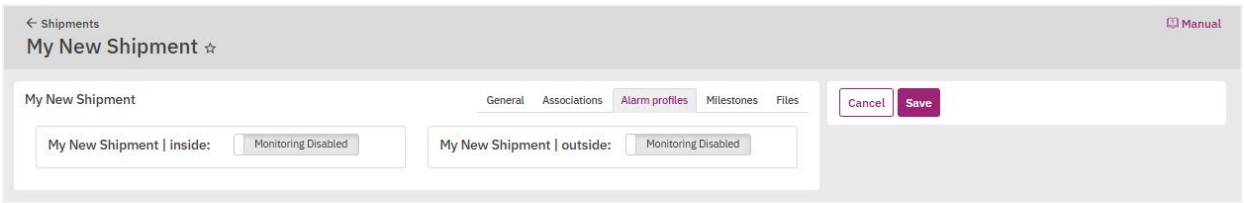
49: Create Shipment – Add Associations

a) In the **Serial No./Name** field, enter your device for the shipment:
b) Select the **Start Date** and the **Stop Date**.

   A start date may be option for some devices. However, if required and if the device is already operating before association, you must specify a start date.

c) Unit Load Device – you can add one or multiple unit load device ids to the device association.
d) Commission Number – you can add one or more commission numbers to the device association.
e) Click on **Save**.

6. In the **Alarm Profiles** tab, provide information about alarm profiles.



50: Create Shipment – Select Alarm Profiles

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a) Click on the **Monitoring Enabled** button, to enable the alarm monitoring:
b) Choose the appropriate alarm profile from the drop-down list:

If you cannot find the necessary alarm profile in the list, you can define a new alarm profile by following the steps in chapter Alarm Profiles.

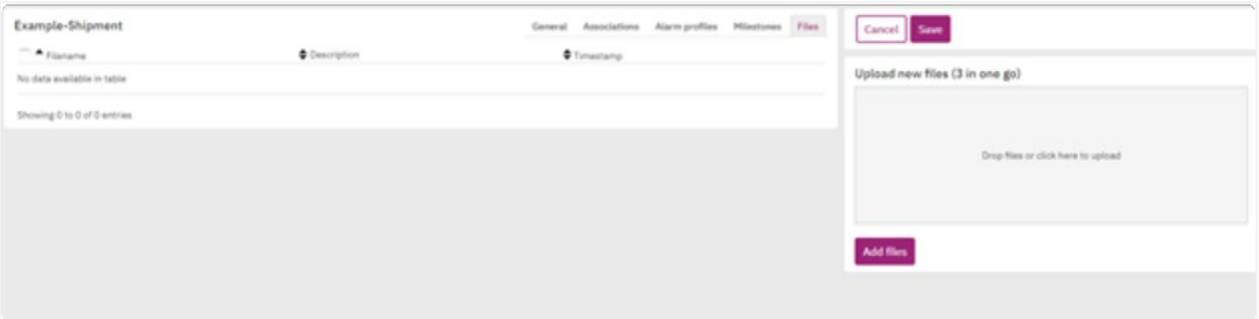
By selecting the alarm profile in the drop-down list, the alarm profile will be applied to your shipment.

c) Click on **Save** to save your changes.

After creating a Shipment, you need to associate one/more devices to it. You can also add devices to an existing shipment that has not been started yet.

7. In the **Files** tab, add files to a shipment

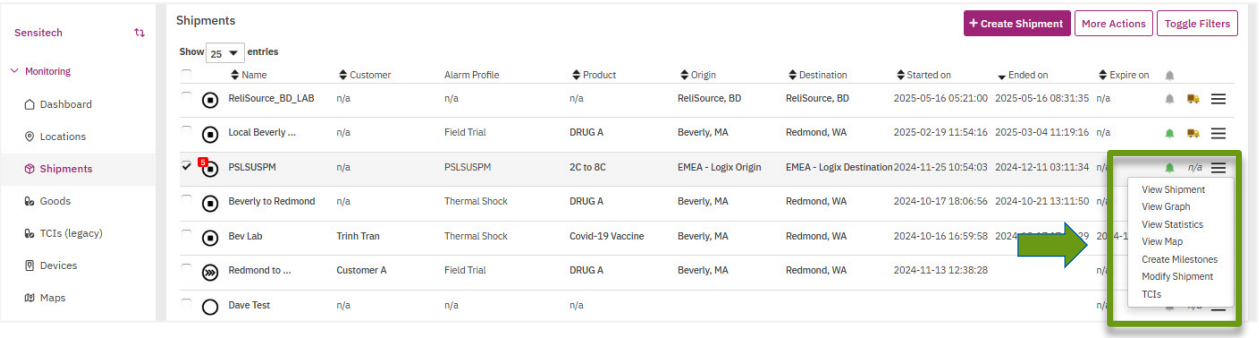
To ensure the best possible documentation it is also possible to add documents to a shipment this can be done by the last tab named Files.



Modify Shipment

To modify your shipment by accessing the Modify screen from one of the following ways:

8. From the Shipment list – select a shipment you want to modify, click on ☰ Action Menu icon and then select **Modify Shipment**:



9. From the Shipment page – click **Modify**.

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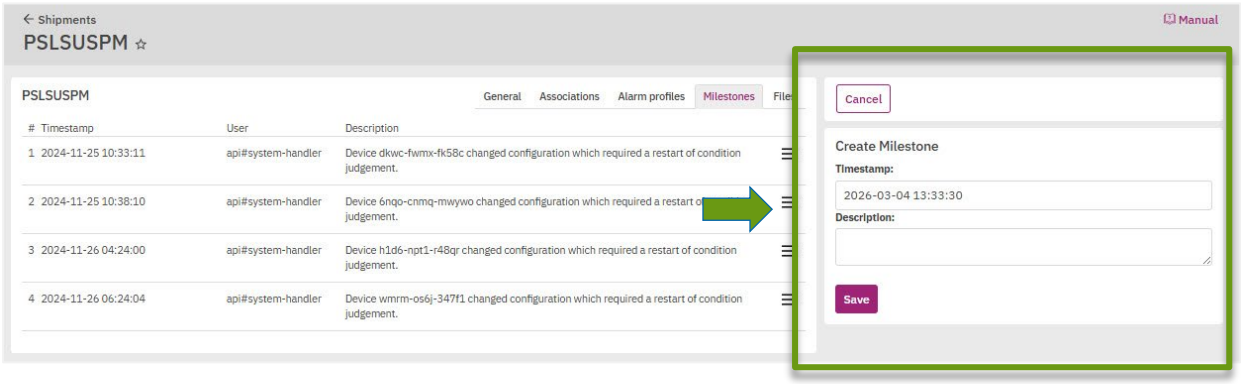
The shipment displays in modify mode where you can make modifications to the shipment details, add alarm profiles and associations, and add files. Refer to the *Shipment Page Overview* section of this document to get more information about each section on the Shipment screen.

Shipment Milestones

SmartView enables users to record pertinent information for a specific shipment by adding milestones. For instance, when a shipment arrives at a location, a user may document this event by creating a milestone such as "Shipment arrived at location X," complete with the corresponding timestamp.

To create a milestone, complete the following steps:

1. In the top-right corner page of the Shipment page, click **+Milestone**.



51: Shipment – Milestones Tab

You can also access this page by opening the shipment in Modify mode and then switching to the **Milestones** tab. Refer to the *Modify Shipment* section to learn how to open a shipment in modify mode.

In the **Create Milestone** section, complete the following:

1. Add a timestamp in the **Timestamp** field
2. Provide a short description of the milestone.
3. Click the **Save** button.

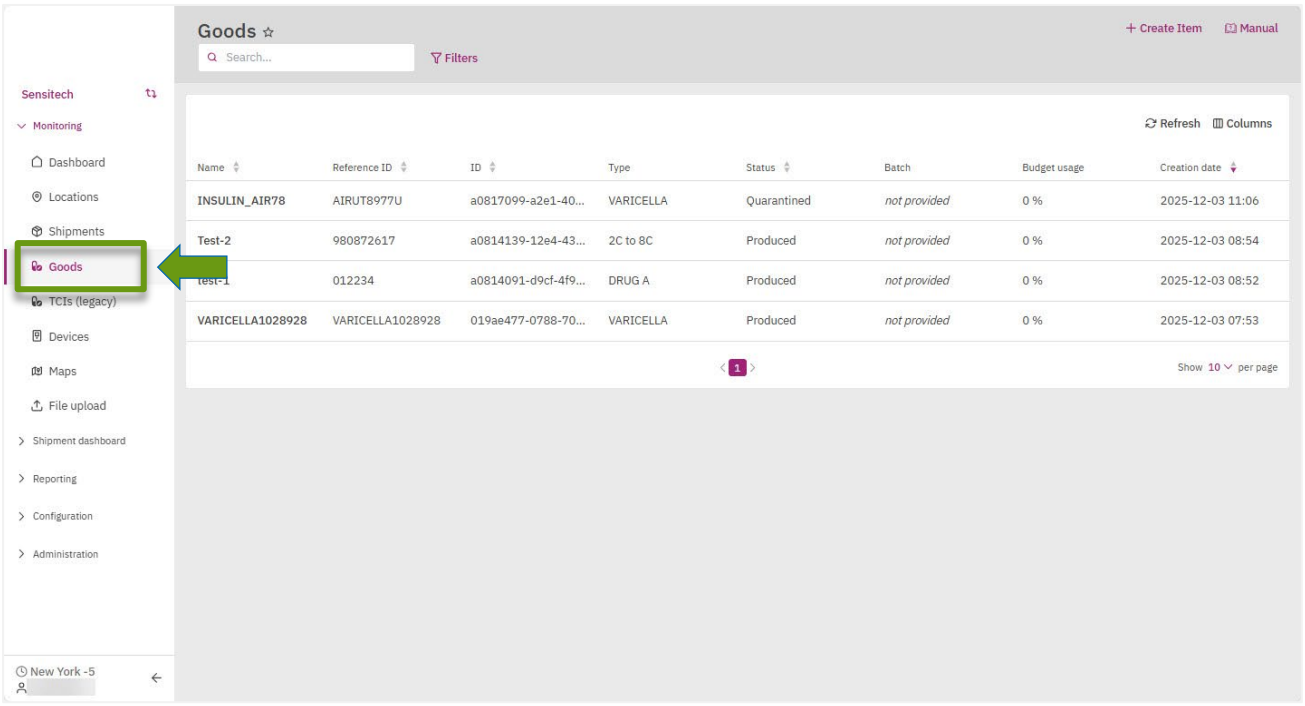
The system adds the milestone to the shipment lists it in the milestone list on the left. You can also view this new milestone in the Milestones section on the General tab.

Goods (New)

Goods are the newly introduced item within SmartView that currently will co-exist besides TCIs. They both stay available at the same time and mirror each other. With the creation of a new TCI at the same time a corresponding Good will be created.

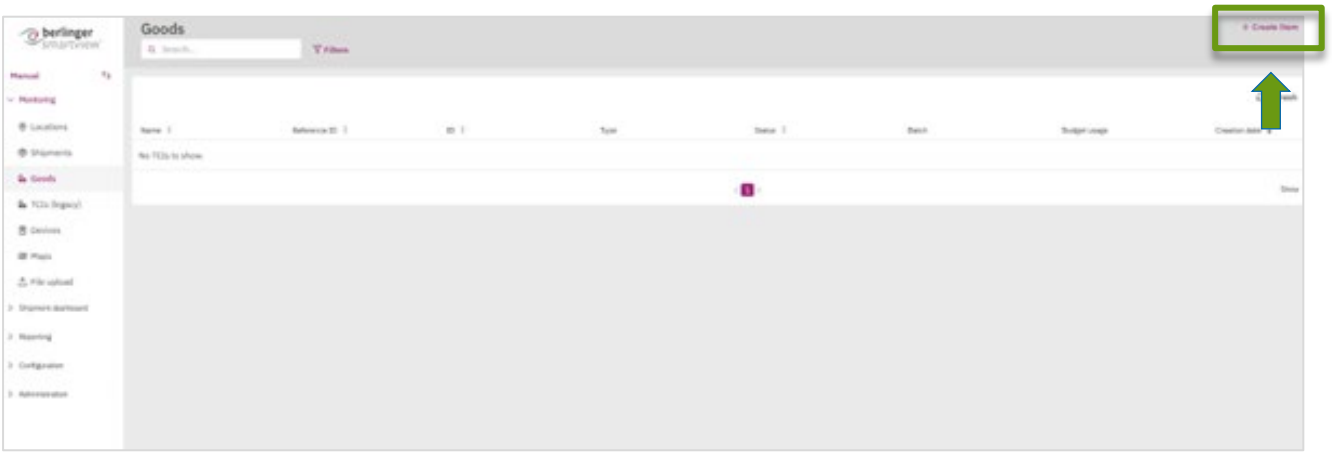
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Within the Goods window it's possible to create a new item on the top right by pressing the Create Item button.



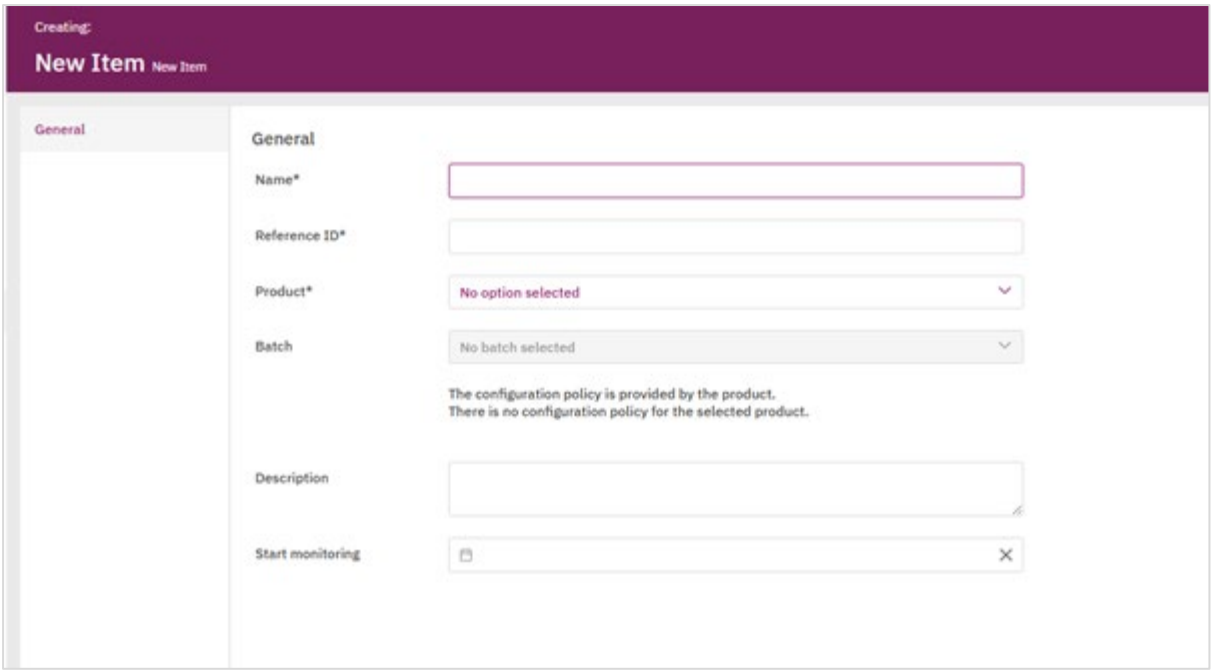
52: Monitoring > Goods

Within the Goods window it's possible to create a new item on the top right by pressing the Create Item button.

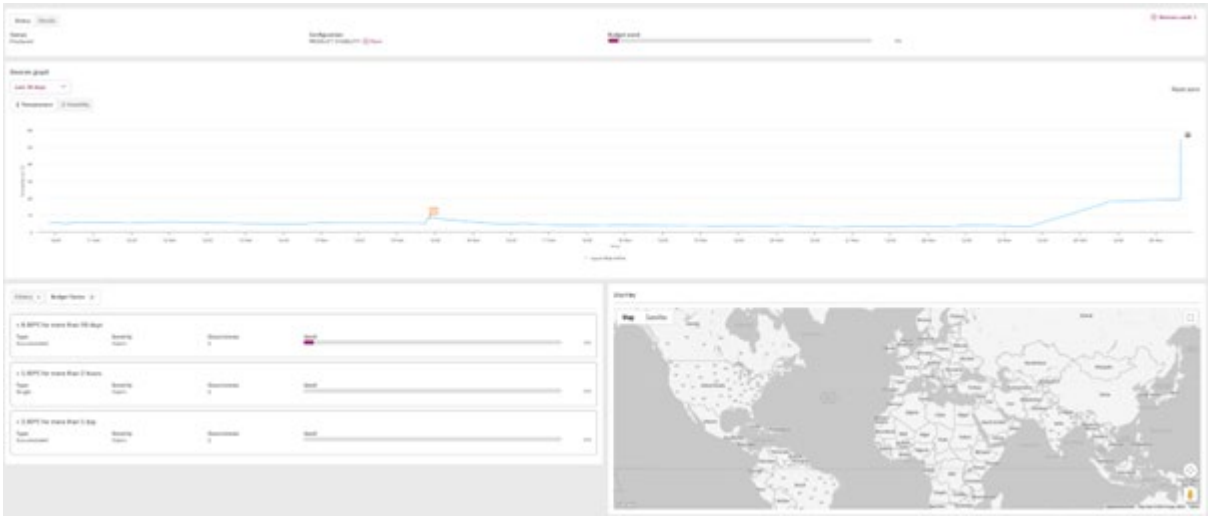


Once pressed the following window will open where the general information for the item can be entered.

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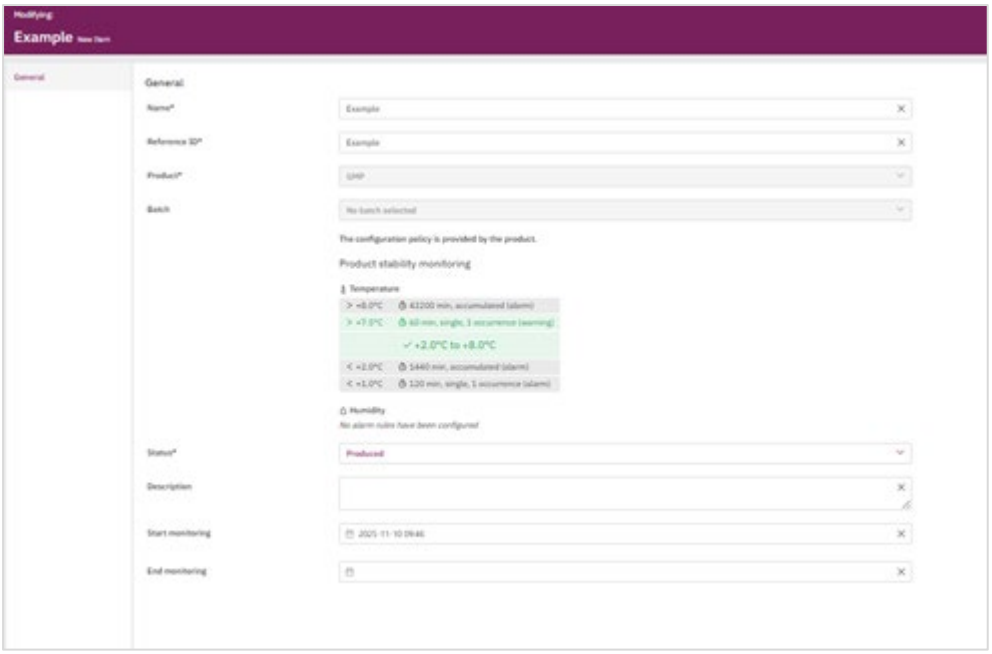


If goods are already present, they can be accessed by clicking on the corresponding name. This will assess the items detailed view.

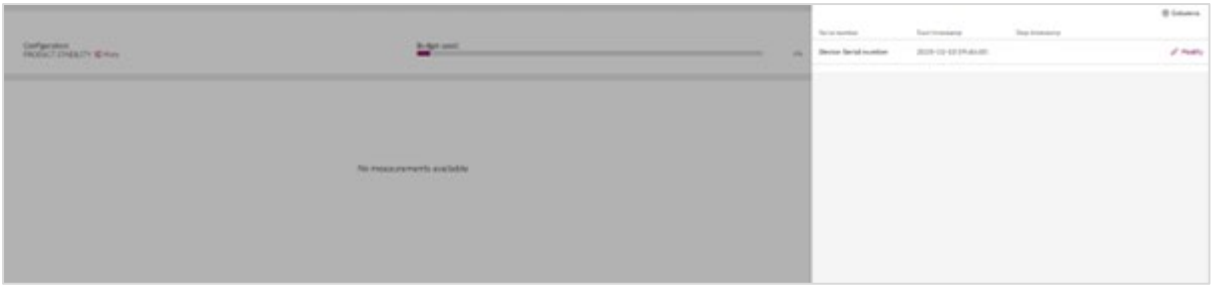


It is possible to create a new association by clicking the create association button on the top right.
Additionally the current information/settings of the item can be edited by clicking on the modify button on the top right which will then open a new view.

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It is also possible to adjust existing associations by clicking on the top right on the devices used button. This will expand a menu on the right where all current associations are visible, and they can be further modified if necessary.



TCIs (Legacy)

TCI refers to a temperature-controlled item that requires continuous end-to-end monitoring throughout its lifecycle, potentially across various sectors and shipments. Integration is necessary to use TCI functionality in SmartView.

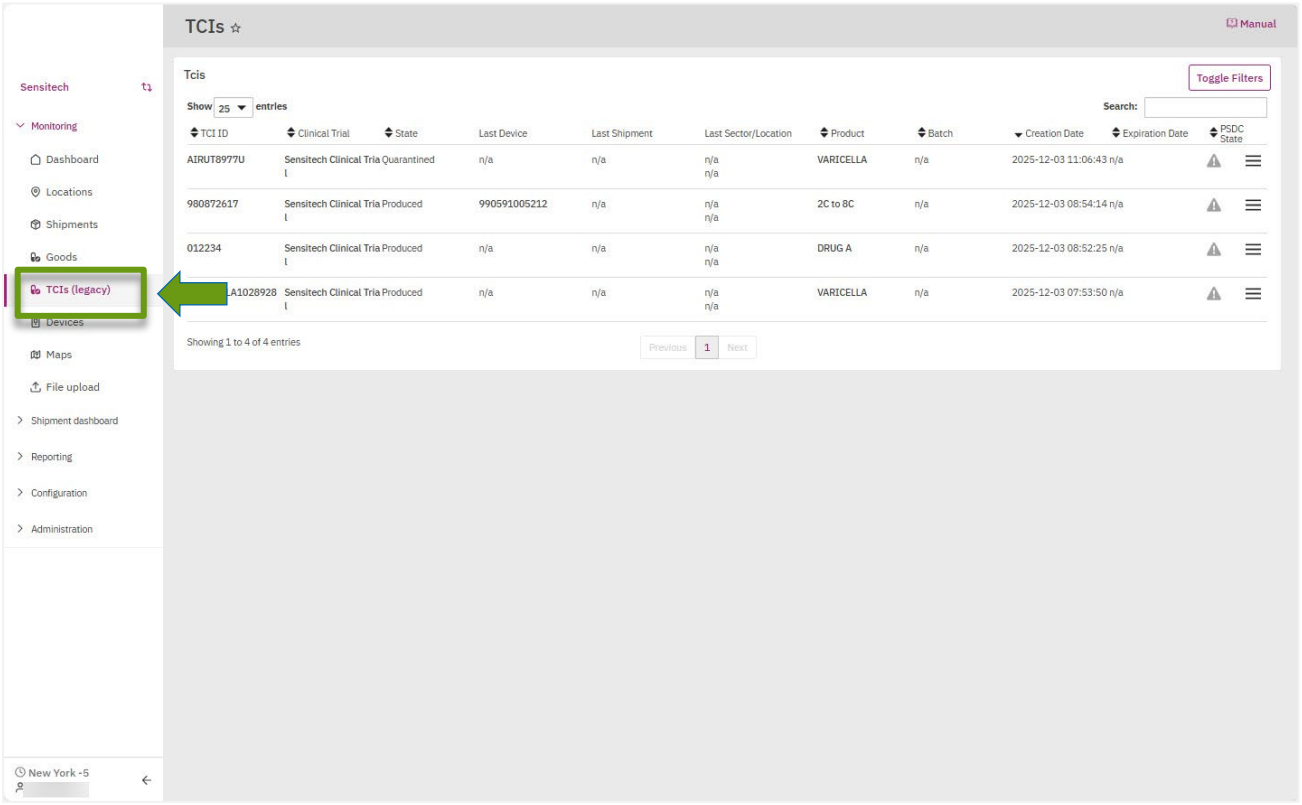
The TCI functionality ensures that sensitive goods—such as pharmaceuticals, biological samples, or other materials requiring strict temperature regulation—are tracked and managed effectively. Continuous monitoring is essential to maintain product integrity and compliance with regulatory standards, especially during transportation and storage.

TCI information is typically sourced from system configuration, which may be set up during clinical trial planning or product definition. This configuration determines the parameters for monitoring, including acceptable temperature ranges, alert thresholds, and reporting requirements.

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TCI List

Users can access the TCI list by navigating to **Monitoring > TCIs**. This list provides an overview of all temperature-controlled items in the system.



53: Monitoring – TCIs

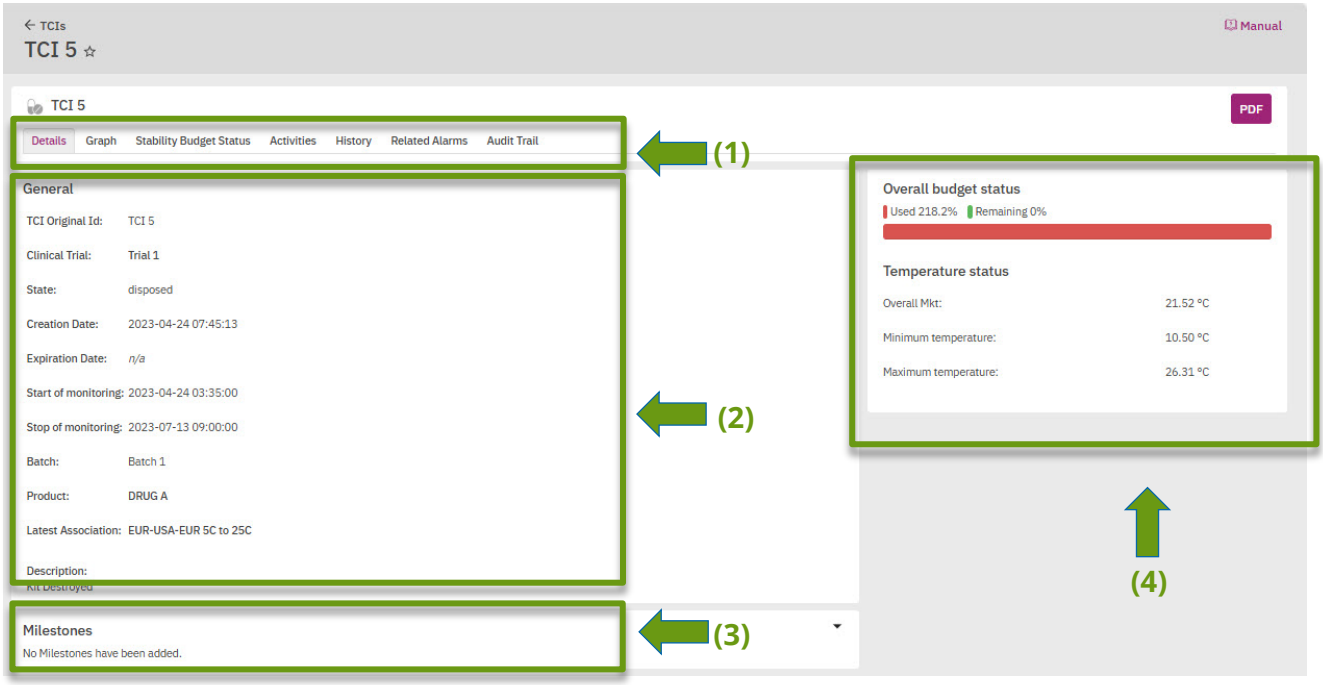
By selecting a TCI from the list, users can view detailed information such as associated products, current monitoring status, historical data, and any alerts or deviations recorded.

- Click on a TCI to view the details of the TCI.
- Select a TCI, then choose an appropriate action from the ☰ Actions Menu on the right:
  - View

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TCI Page

Under this page you will find all important details from TCI.



54: TCI Page

This section describes tabs that are included in the TCI page (1).

Details Tab

Click on **Details** to see the Details tab for the TCI. This is a default tab that opens when opening a TCI page. Refer to the *45: TCI Page* to see the screenshot for this tab.

The tab includes the following sections:

- General (2)
- Milestones (3)
- Overall Budget Status (4)

Review the following information about these sections.

General Section

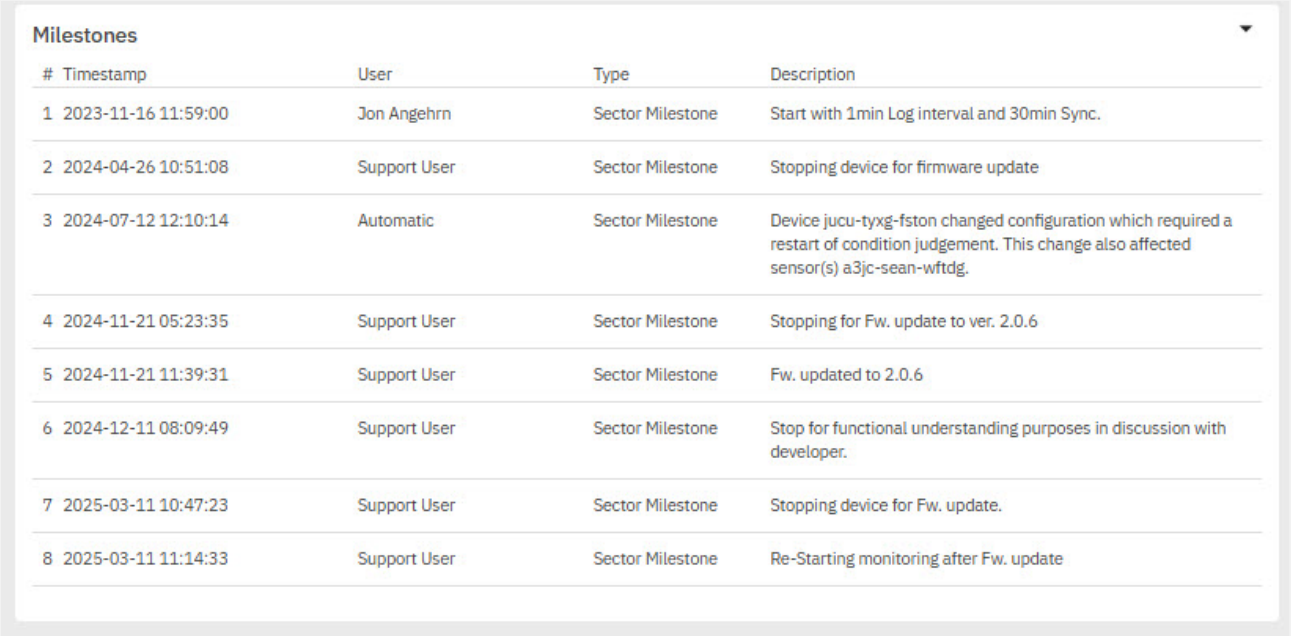
The General section of the Details tab contains general information about the TCI such as the TCI ID, clinical trial, the state that it is in, creation and expiration dates, batch, product, etc.

TCIs are only available through API integration.

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Milestones Section

The Milestones section lists sector or shipment milestones.



Milestones

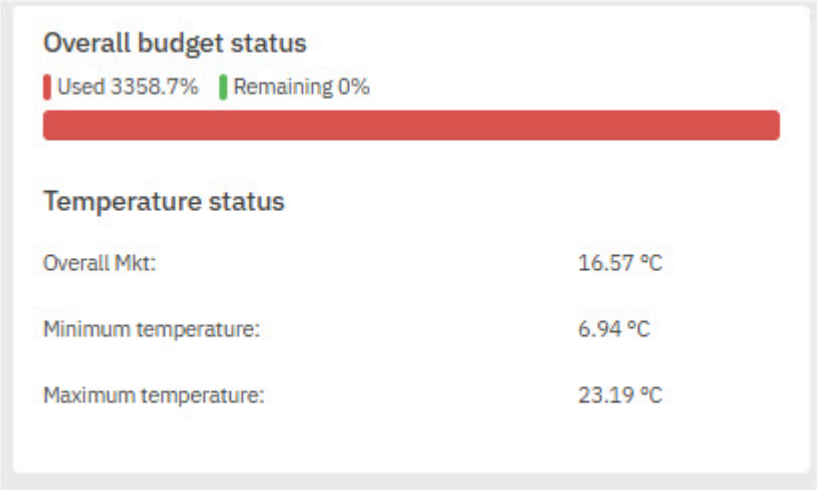
#	Timestamp	User	Type	Description
1	2023-11-16 11:59:00	Jon Angehrn	Sector Milestone	Start with 1min Log interval and 30min Sync.
2	2024-04-26 10:51:08	Support User	Sector Milestone	Stopping device for firmware update
3	2024-07-12 12:10:14	Automatic	Sector Milestone	Device jucu-tyxg-fston changed configuration which required a restart of condition judgement. This change also affected sensor(s) a3jc-sean-wftdg.
4	2024-11-21 05:23:35	Support User	Sector Milestone	Stopping for Fw. update to ver. 2.0.6
5	2024-11-21 11:39:31	Support User	Sector Milestone	Fw. updated to 2.0.6
6	2024-12-11 08:09:49	Support User	Sector Milestone	Stop for functional understanding purposes in discussion with developer.
7	2025-03-11 10:47:23	Support User	Sector Milestone	Stopping device for Fw. update.
8	2025-03-11 11:14:33	Support User	Sector Milestone	Re-Starting monitoring after Fw. update

55: TCS Page – Details Tab – Milestones

Overall Budget Status Section

If information is available, you can view the stability budget status on the right side of the TCI page (4).

When the measured values reach or exceed this budget, it typically signals that the product may no longer meet the predetermined stability criteria, prompting further review or action.

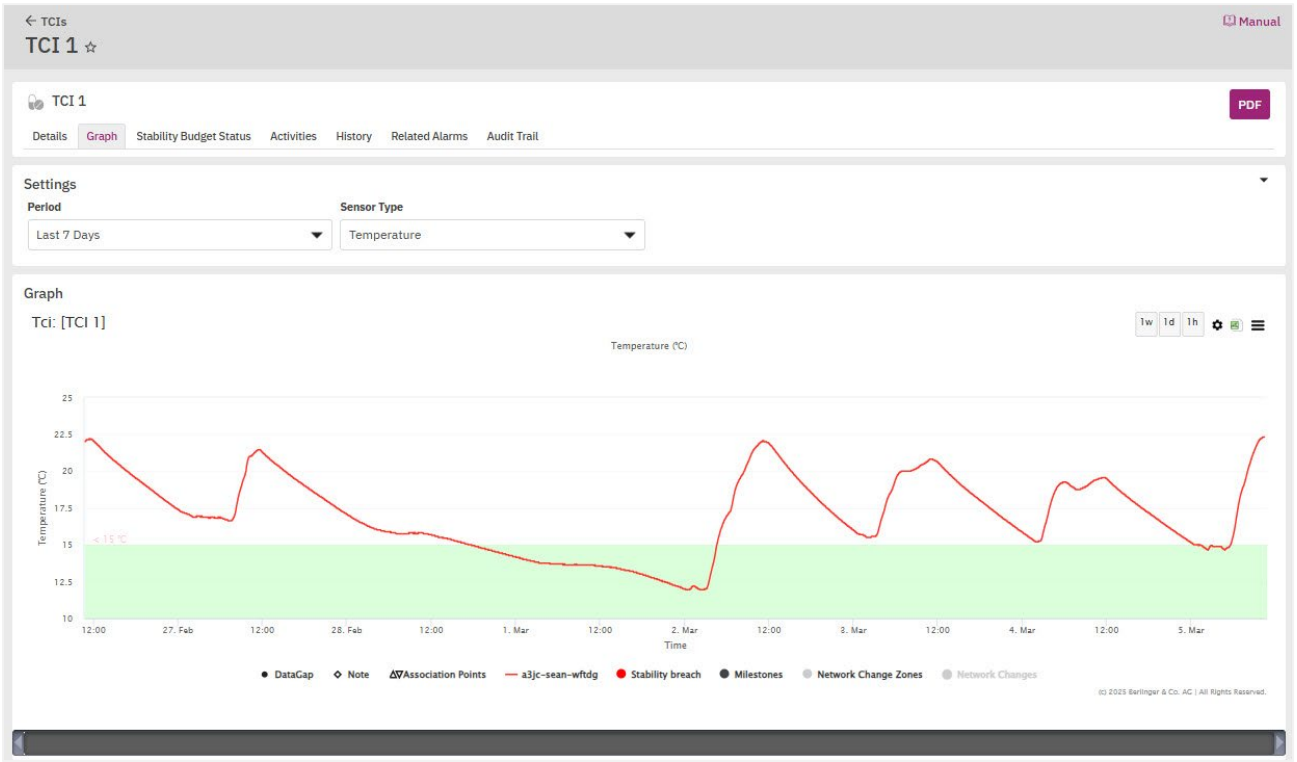


56: TCI Page – Details Tab – Overall Budget Status

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Graph Tab

A graph will display the measurements. When the stability budget is met, the target band turns light green and an exclamation mark ("!") appears.



57: TCI Page – Graph Tab

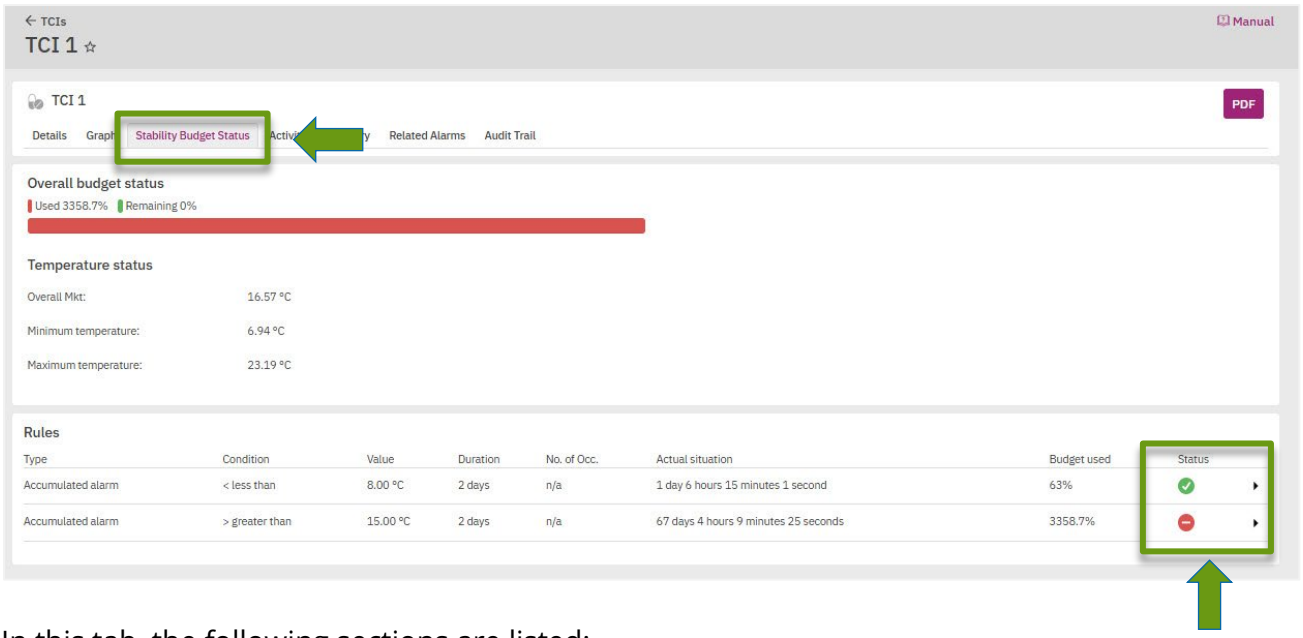
For more information about graphs in SmartView, please refer to *Graphs* section in Common Elements in SmartView.

Stability Budget Status Tab

Click **Stability Budget Status** to open the tab.

This page give an overview of the stability budget used and is still available. Further details about the different breaches of the stability budget rules can be displayed by pressing the small arrow on the right side of the rules.

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In this tab, the following sections are listed:

- Overall budget status
- Rules

Overall budget status

This section of the tab lists stability budget status, which is similar to the section on the **Details** tab.

Rules

Rules may be established during the planning phase of clinical trials or during product definition. This configuration specifies the parameters that will be monitored. TCI can be added either manually or through an API, depending on the degree of integration.

Additional information regarding specific breaches of the stability budget rules can be accessed by selecting the small arrow ▶ located on the right side of the rules.

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Breaches

	Period	Duration	Accumulated Duration	Budget used
1.	2023-04-19 02:23:42 - 2023-04-19 02:27:48	4 minutes 6 seconds	4 minutes 6 seconds	0.1%
2.	2023-04-19 02:55:05 - 2023-04-19 05:52:04	2 hours 56 minutes 59 seconds	3 hours 1 minute 5 seconds	6.1%
3.	2023-04-27 11:47:35 - 2023-04-27 15:07:35	3 hours 20 minutes	6 hours 21 minutes 5 seconds	6.9%
4.	2023-04-28 12:07:35 - 2023-04-28 12:17:35	10 minutes	6 hours 31 minutes 5 seconds	0.3%
5.	2023-04-28 12:32:35 - 2023-05-16 22:32:35	18 days 10 hours	18 days 16 hours 31 minutes 5 seconds	920.8%
6.	2023-05-16 22:32:35 - 2023-05-16 22:47:35	15 minutes	18 days 16 hours 46 minutes 5 seconds	0.5%
7.	2023-05-17 15:42:35 - 2023-05-17 15:52:35	10 minutes	18 days 16 hours 56 minutes 5 seconds	0.3%
8.	2023-05-18 16:12:35 - 2023-05-18 16:57:35	45 minutes	18 days 17 hours 41 minutes 5 seconds	1.6%
9.	2023-05-18 16:57:35 - 2023-05-18 17:12:35	15 minutes	18 days 17 hours 56 minutes 5 seconds	0.5%
10.	2023-05-19 07:47:35 - 2023-05-19 08:27:35	40 minutes	18 days 18 hours 36 minutes 5 seconds	1.4%
11.	2023-05-19 11:52:35 - 2023-05-19 12:02:35	10 minutes	18 days 18 hours 46 minutes 5 seconds	0.3%
12.	2023-05-19 12:07:35 - 2023-05-19 12:17:35	10 minutes	18 days 18 hours 56 minutes 5 seconds	0.3%
13.	2023-05-19 12:17:35 - 2023-05-19 12:32:35	15 minutes	18 days 19 hours 11 minutes 5 seconds	0.5%
14.	2023-05-19 12:32:35 - 2023-05-19 20:02:35	7 hours 30 minutes	19 days 2 hours 41 minutes 5 seconds	15.6%
15.	2023-05-19 20:07:35 - 2023-05-19 20:17:35	10 minutes	19 days 2 hours 51 minutes 5 seconds	0.3%
16.	2023-05-20 03:17:35 - 2023-05-20 03:27:35	10 minutes	19 days 3 hours 1 minute 5 seconds	0.3%
17.	2023-05-20 03:47:35 - 2023-05-20 04:07:35	20 minutes	19 days 3 hours 21 minutes 5 seconds	0.7%
18.	2023-05-20 04:07:35 - 2023-05-20 04:17:35	10 minutes	19 days 3 hours 31 minutes 5 seconds	0.3%
19.	2023-05-20 04:17:35 - 2023-05-20 04:27:35	10 minutes	19 days 3 hours 41 minutes 5 seconds	0.3%
20.	2023-05-20 04:32:35 - 2023-07-07 05:00:55	48 days 28 minutes 20 seconds	67 days 4 hours 9 minutes 25 seconds	2401%

Impact

Kit Spoiled

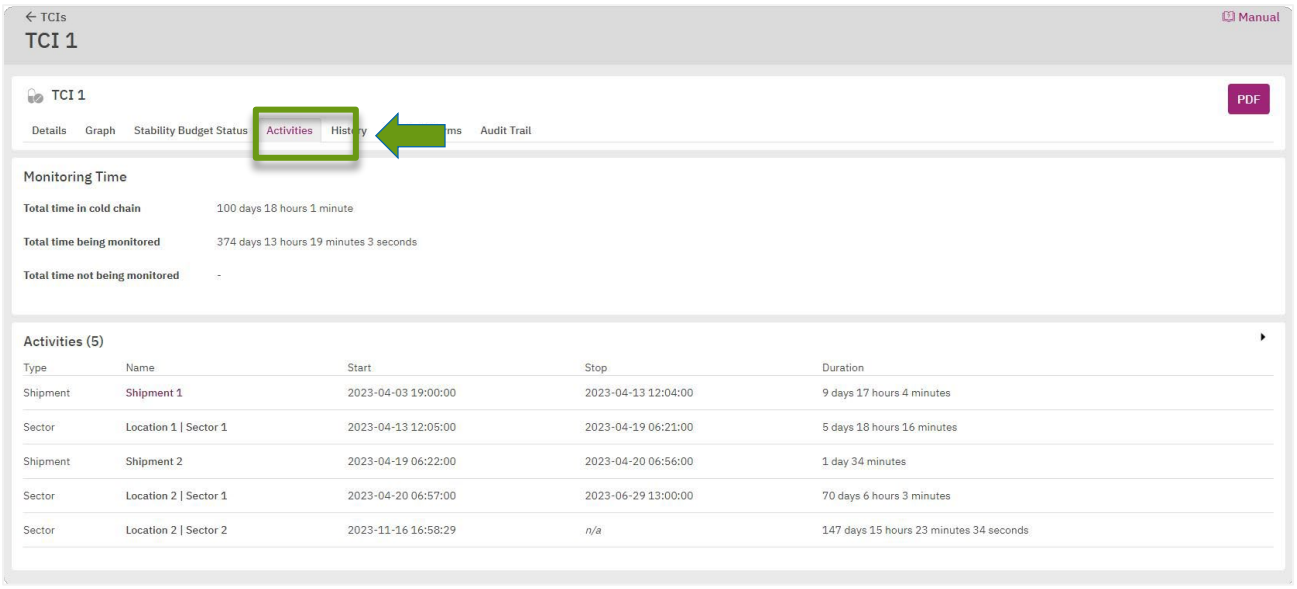
Action

Quarantine Kit

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Activities Tab

Click **Activities** to view the Activities tab.



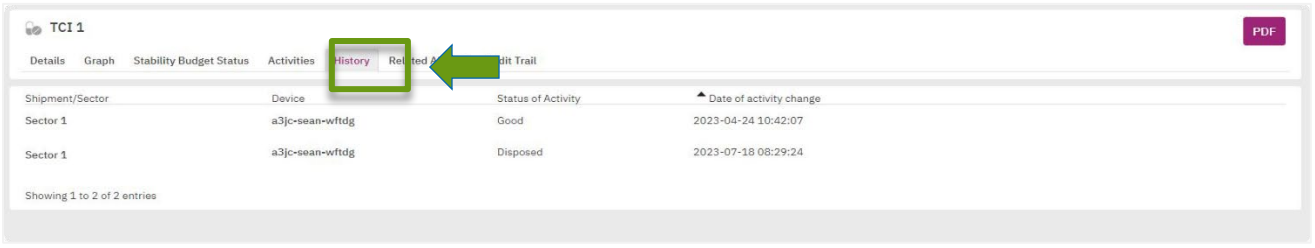
58: TCI Page – Activities Tab

This page provides an overview of the recorded activities. A comprehensive summary is available at the top, followed by a detailed list in the latter section, where all TCI associations are presented in chronological order.

History Tab

Click History to view the History tab.

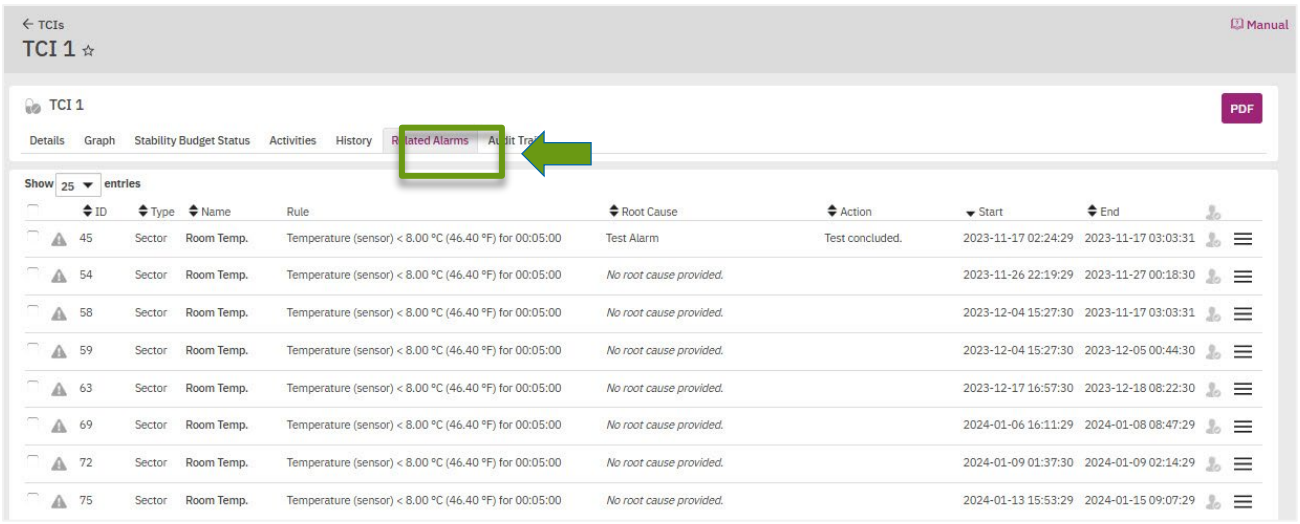
This page displays an overview of the different statuses the TCI had over its lifetime.



Related Alarms Tab

In this page alarms are listed that that would have occurred within a sector or shipment while the TCI was assigned to it.

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59: TCI Page – Related Alarms Tab

Users can view alarm details by selecting an alarm from the list and then selecting one of the options in the ☰ Action Menu:

- View Excursion
- View Graph

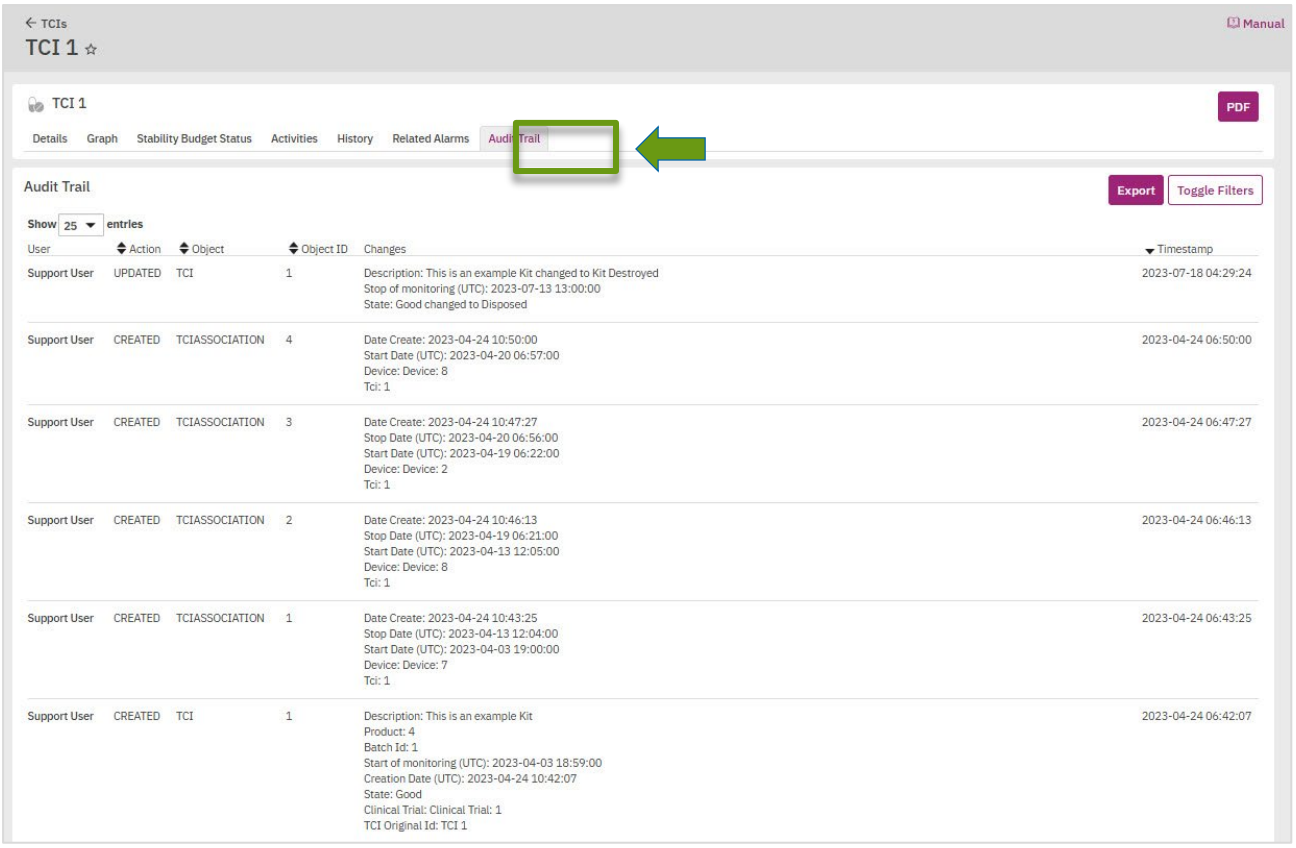
Audit Trail Tab

In the Audit Trail tab for TCI

The Audit Trail tab in the TCI page provides a chronological record of all actions taken regarding the TCI. Users can review each event, including modifications, status changes, and any other relevant activities. Additionally, there is an option to generate a PDF report summarizing selected actions for documentation purposes.

Click **Audit Trail** to view Audit Trail tab:

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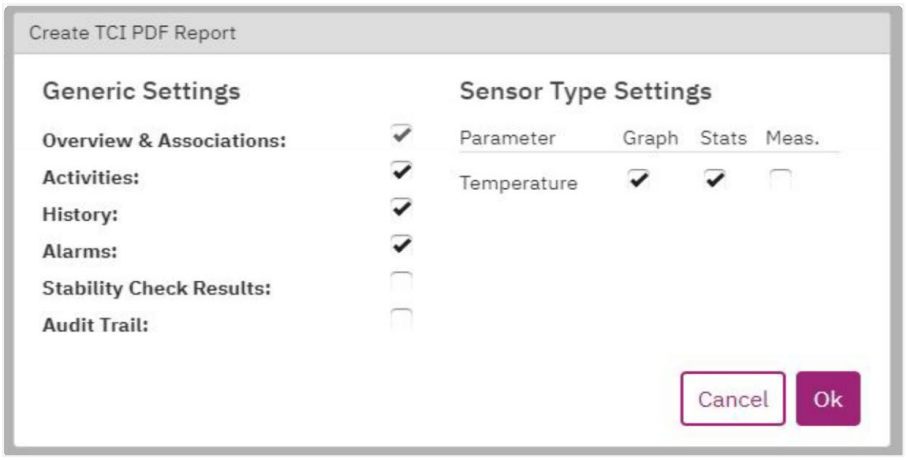
60: TCI Page – Audit Trail Tab

While viewing the Audit Trail tab, users can do the following:

- Click **Export** to export a PDF report for the Audit Trail.
- Click **Toggle Filters** to view specific entries based on the filters such as username, time frame, and action (created, deleted, updated).

Page Actions

With a click on **PDF button**. A pop up will appear that contains a selection for a PDF report that can be generated.



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Select the options you want to be generated in the report for your TCI and then click **OK**.

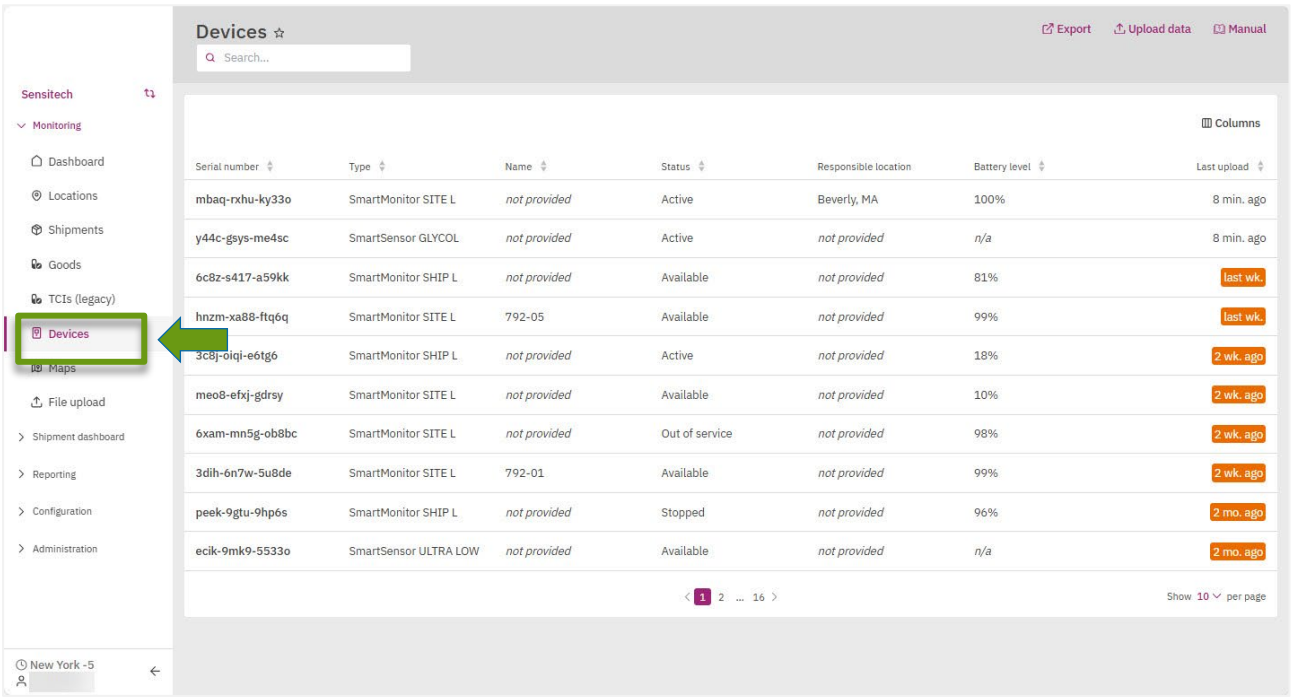
Devices

SmartView devices monitor shipment or storage facilities and fall into two categories: real-time and conventional. Real-time devices transmit data at set intervals via available networks, while conventional devices record temperature and humidity locally for later retrieval upon arrival or as needed in storage facilities.

Upon ordering, devices are registered with the corresponding license. Within the device view, a comprehensive list of all devices registered under your sublicense is available. Devices that are no longer associated with the license but possess historical data will continue to be displayed in this list. Where permitted, transferring devices between licenses is possible.

Device List

To view devices list, select **Monitoring > Devices**. A list of devices displays:



61: Monitoring > Devices

Device Association and Device Management

Devices are pre-registered during the order process.

In this list you can view the details of a device and see if the device is associated with a sector or a shipment.

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All devices need to be associated through a sector or shipment. However, you can edit and configure devices on the Device page. Though you can edit devices in Monitoring > Devices, you cannot associate a device to a location sector or shipment. Devices associations are done though the location sector or shipments.

Please refer to Location Sectors section for more information about location sectors and associated devices.

Please refer to the *Locations* section to learn how to associate devices with the location sectors. Refer to the *Shipments* section to learn how to associate devices with shipments.

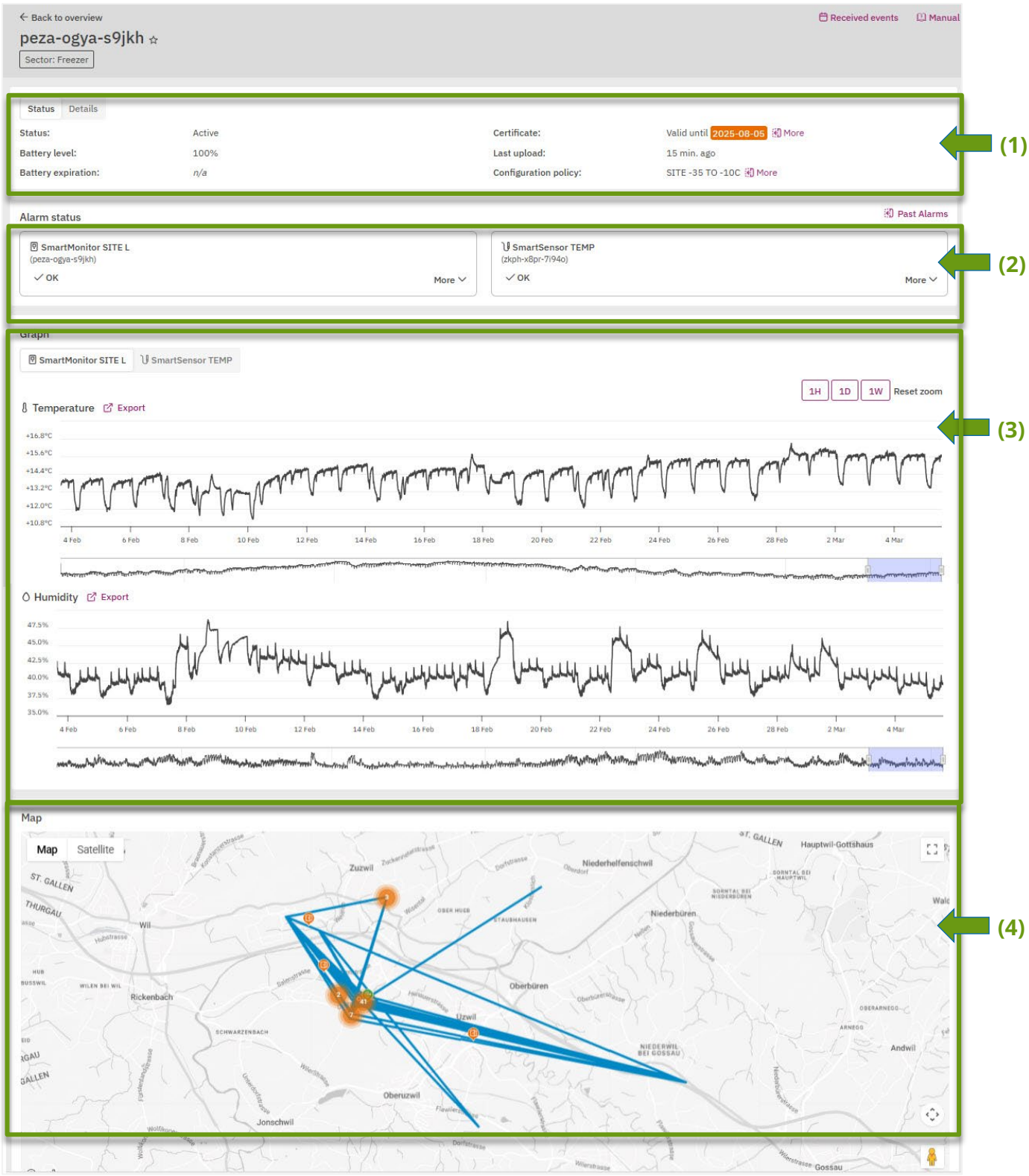
Supported Devices

For a list of supported devices in SmartView, please refer to the *Supported Devices* section in this document.

Device Page

From the Device List, select a device to view a Device Page which may look similar to the following:

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62: Device Page

A device page has the following sections:

- Status/Details (1)
- Alarm Status (2)

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- Graph (3)
- Map (4)

Refer to the Page Sections for a detailed description of each section of Device page.

Page Sections

This section describes areas in Device page (sections).

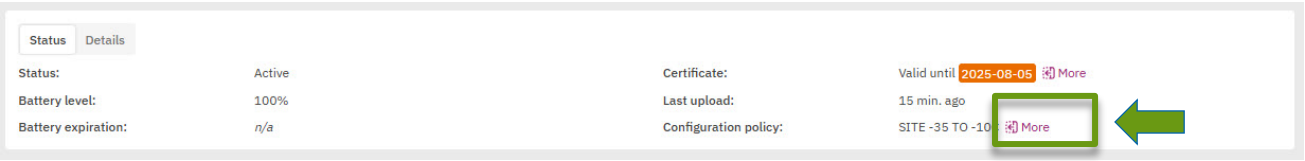
Status/Details Section

This view displays the device's status, including policy and battery level. Devices can be enabled, disabled, or set to out of service.

Disabled devices function but can't be assigned to new shipments, sectors, or TCI. "Out of service" marks devices as non-operational, triggering an irreversible remote stop and data wipe for lost or stolen units.

If linked to a sector or shipment, this appears below the serial number. Clicking **Details** opens more information and a customizable data field. The **Sublicense** option allows moving the device to another sublicense.

For a step-by-step guide on how to move a device to another Sublicense, see Changing Device Sublicense.



63: Device Page – Status/Details Section

Learn more about switching Sublicense in this chapter (link to the *Moving a Device to Another Sublicense.*

Device Calibration

The status of the calibration of the device can be seen when the device is accessed and visible within the status window.

All devices are subject to the calibration certificate expiry notification. Calibration certificate expiry notification.

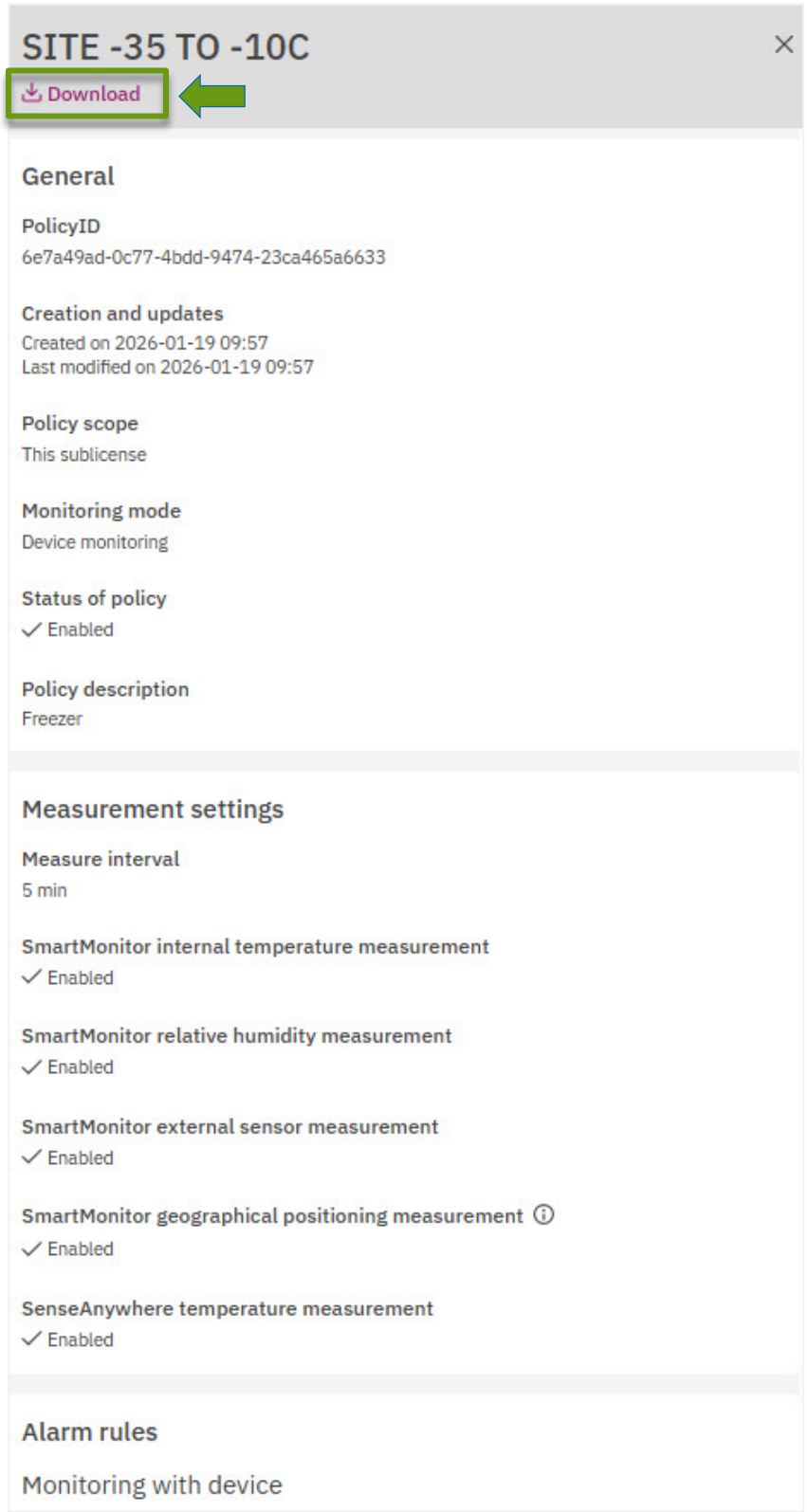
The status view includes a More button located next to the policy configuration details. Selecting this option opens a pop-up window displaying information about the active policy.

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- Click **Download** to download the policy (1).
- Click **Change** to change this policy for a new one.

This option is only available for SmartMonitors.

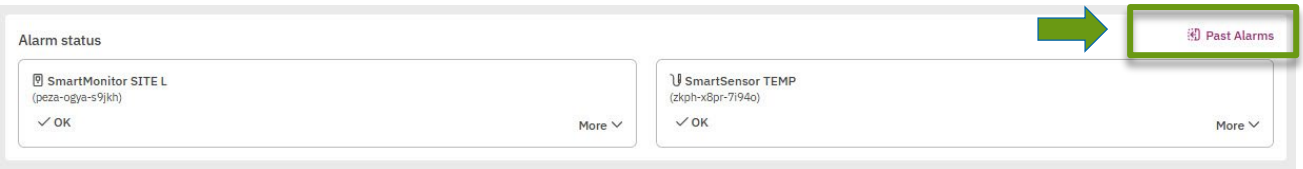
Then a new window will open where the new policy can be selected



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Alarm Status Section

The current status of a device can be regard within the alarm status tab. Per default only the current status is shown. The alarm rules can be displayed by pressing the more arrow at the right side of this window.

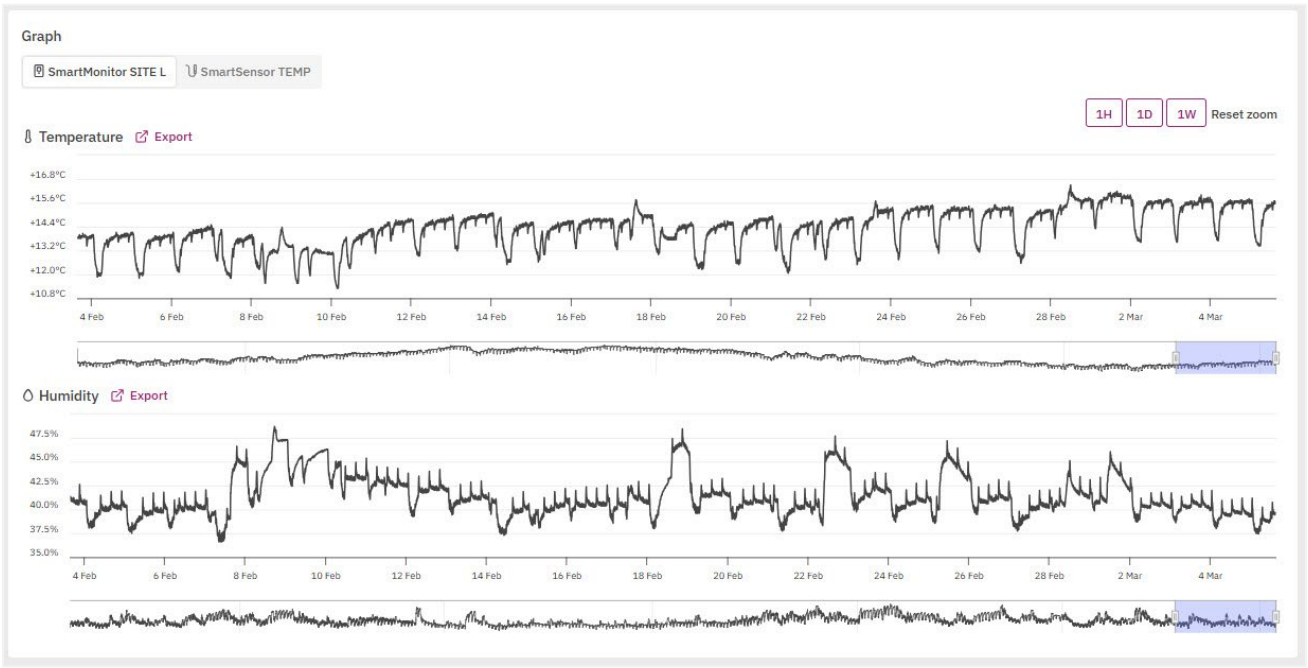


64: Device Page – Alarm Status Section

By pressing **Past Alarms** a pop-up will show that will display a history of all alarms that occurred in the past.

Graph Section

The graph appears below, with each metric shown in a separate graph. Each graph includes a main section and a smaller overview beneath it for reference.



65: Device Page – Graph Section

By hovering over a specific area within the graph further detailed information can be displayed.

You can also download the graph as a .png image by clicking the **Export** button located next to the Graphs title.

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Refer to the *Graphs* section of this document to learn more about graph settings, controls, zoom, and other functions you can use with the graph.

Map Section

The last area within this view consists of the map display where the device can be tracked if GPS services are activated.



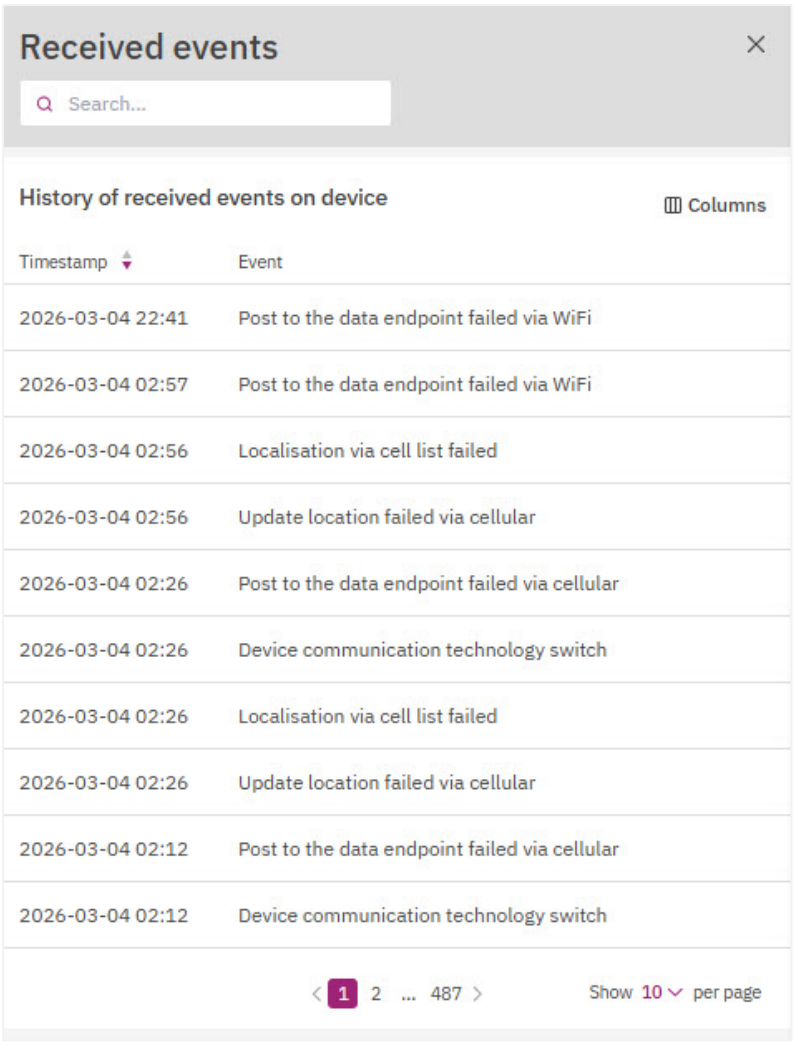
66: Device Page – Map Section

Page Actions

While viewing the device page, users can select the following actions:

- **Stop/Restart** options are only available after a device has been started/stopped, respectively. These options only apply to SmartMonitor devices.
- In the top-right corner, select **Received events** to view a pop-up listing all recorded events, helping you monitor any changes or activity detected by the device.

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67: Device Page – Received Events

The Ship L contains an additional functionality that will allow it to record temperature a certain amount of time after it has been stopped in case the stop occurred prematurely, and further data would be required

Changing Device Sublicense

If you wish to move a device from one Sublicense to another Sublicense the device cannot have any active associations. All associations must be stopped prior to moving the device and the device must be in available/enabled state.

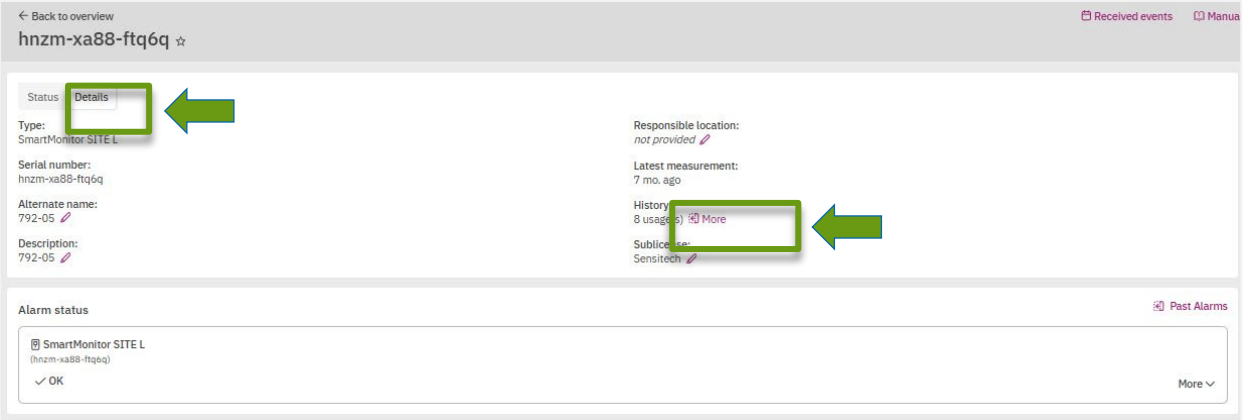
1. Access the Device.

   In the **Monitoring > Devices** list, select a device you wish to move to a new Sublicense by clicking on its serial number.

   Device Page opens.

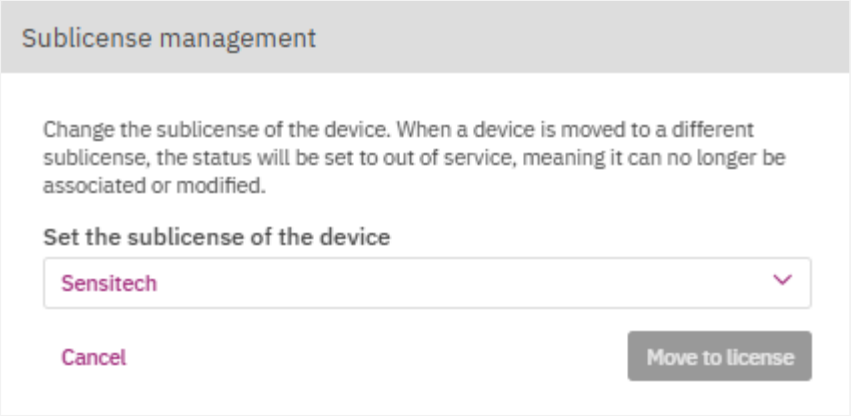
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2. On the Device Page, in the **Details** tab:



3. Click the symbol to open **Sublicense** selection menu. A

   Sublicense Management pop-up window displays.



4. Select new Sublicense from the list and then click **Move to license**.

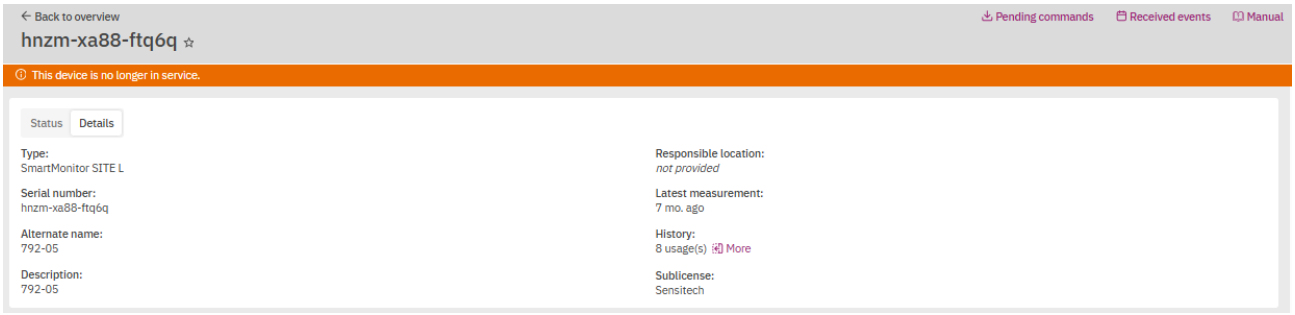
   To be able to move a device to a different Sublicense the user requires access to the origin as well as destination Sublicense.

5. Confirm your selection.

After the device is moved to a new Sublicense the device will stay visible within the old Sublicense with all the data gathered up to this point, but no new data will be visible for that device within the original Sublicense. In addition, its status is adjusted to “Out of Service” and

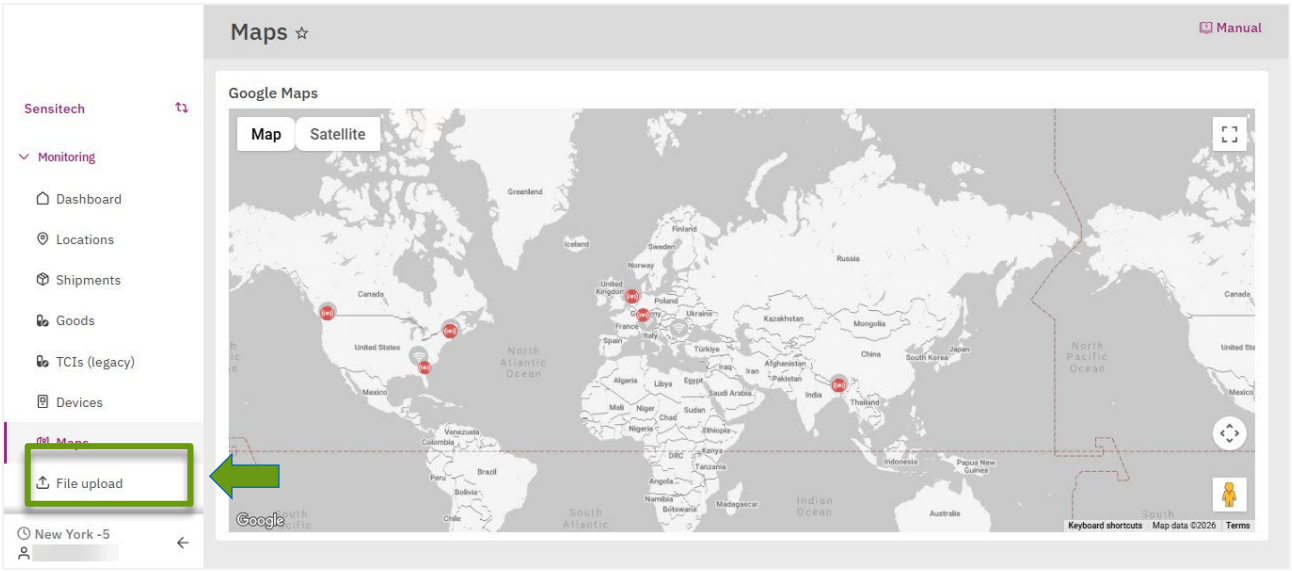
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an additional orange banner is shown.



Maps

You will find an overview of all destinations which you have set up as location/destination on the map.



68: Monitoring > Maps

By selecting one of the green, red, or grey icons, you will access more detailed information about the device, including its coordinates, operational status, device type, and other relevant data.

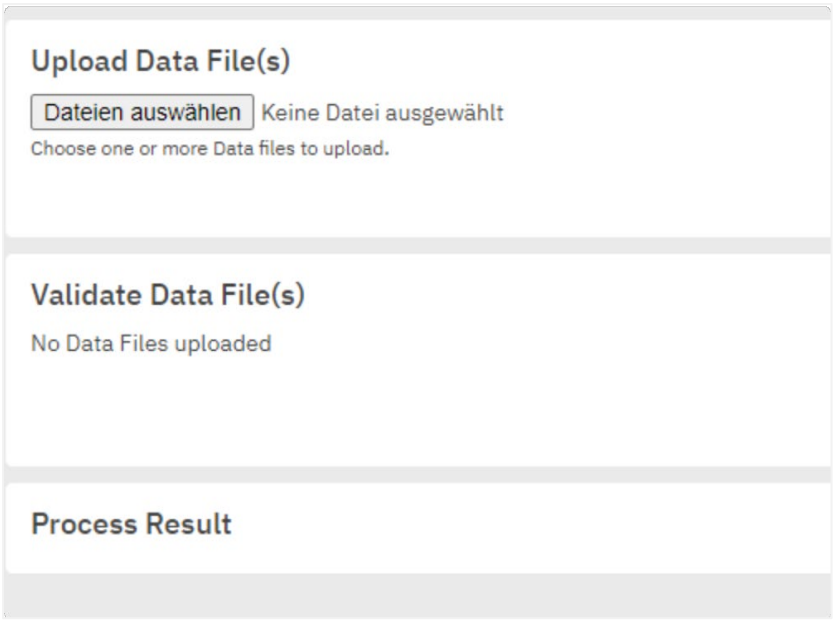
File Upload

Uploading a data file is a three-step process.

1. To begin the upload process, navigate to the Devices page and click the **Upload data** button located in the upper right corner. Alternatively, you may access the File Upload screen directly from the menu on the left, if this option is available.
2. Select File(s).

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Choose the data file(s) and click the **Upload File(s)** button.



3. Check File(s).

   After the data files are uploaded, in the second step the system will check the integrity of the files. You will be notified if any file is invalid or its integrity has been compromised or if the file has been uploaded to the system earlier.

4. Process Files.

   Finally, click the Process File(s) button to store the data in the system. If any device ID does not exist in the system, this process will ensure the inclusion of the device ID in the system. If the devices are already associated with any shipment, this process will also make updates to the shipment information such as filling in the start time of the shipment.

   After the files are processed, the results will be shown in the Results section. You will be notified about how many of the files have been processed and how many of them are ignored.

5. (Only applicable for Fridge-tag data files): Select Time zone.

   The time zone can be selected when uploading the file. The last setting will be stored as a default, no need to choose the time zone every time when uploading. To be sure that you have chosen the right time zone you have to confirm the time zone with “OK”.

This procedure applies exclusively to the CLm document family, TempTale, and SmartMonitor devices. Data upload files may be transmitted to SmartView via email; no subject line is required, and the email body should remain blank.

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For SmartMonitor devices, a cloud response file will be generated and must be saved to the device.

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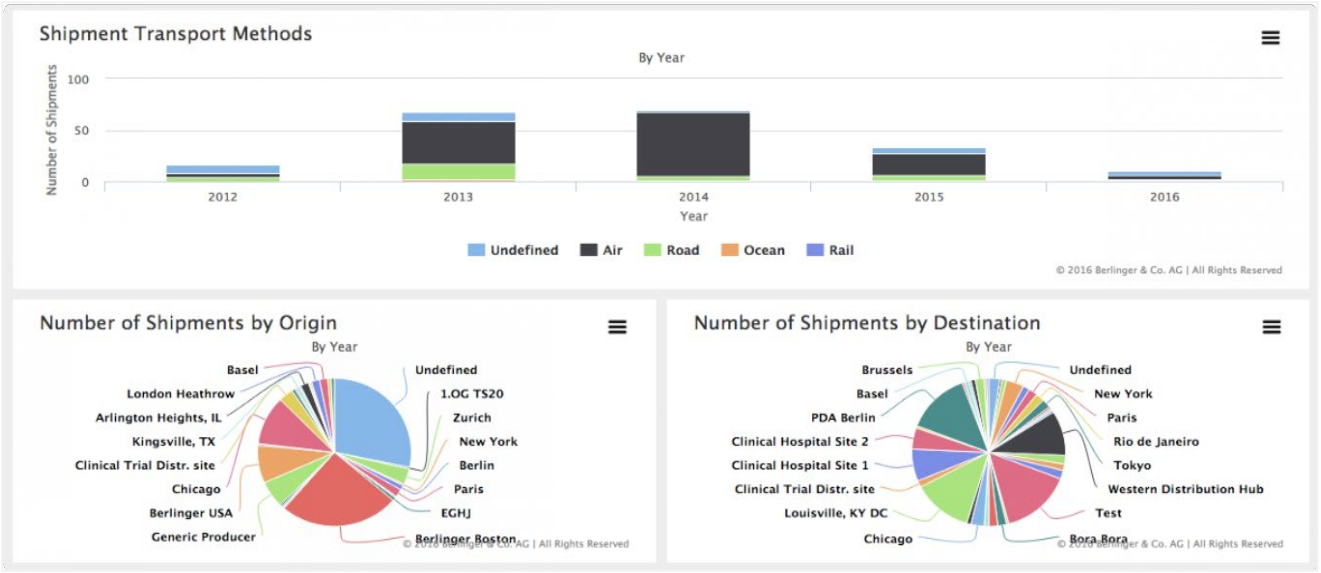
Shipment Dashboard

The Shipment Dashboard offers aggregated information about excursions, transportation, and the monitoring process. The dashboard is generated automatically and moreover; it is also possible to receive monthly subscriptions by e-mail. The dashboard enables trend analysis, e.g., on shipments with excursions on a specific trade lane.

Usability

The Shipment Dashboard provides statistical information based on different entities:

- **Excursions:** statistical report of the excursions that have been identified based on selected time frames.
- **Details:** overview of all the shipments that have been monitored and statistical analysis of the information related to the shipments (such as origin, destination, customer, or products) based on a selected time frame.
- **Device usage:** statistics based on the used monitoring devices and the information related to their use.



Tip: You have the option in SmartView to automatically receive a monthly update of the Shipment Dashboard by e-mail.

You can subscribe as follows: Navigate in the menu to Profile —> Support User and click to Subscriptions. Make a tick at the Transport Report.

- Shipment Dashboard Details
- Shipment Dashboard Alarm Statistics
- Shipment Dashboard Device Usage

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Dashboard Details

From the left-navigation menu, click **Shipment Dashboard > Details** to view dashboard:



69: Shipment Dashboard > Details

The following sections are included in the shipment Dashboard Details:

- Shipment Transport Method – The mode of transport utilized for the shipment, illustrated as a line graph.
- Number of Shipments by Status – Quantity of shipments categorized by shipment status, presented in a pie chart.
- Number of Shipments by Origin – Shipment quantities organized by origin locations, displayed as a pie chart.
- Number of Shipments by Destination – Shipment volumes classified by destination, shown as a pie chart.
- Number of Shipments by Product – Shipments grouped according to product type, visualized as a pie chart.

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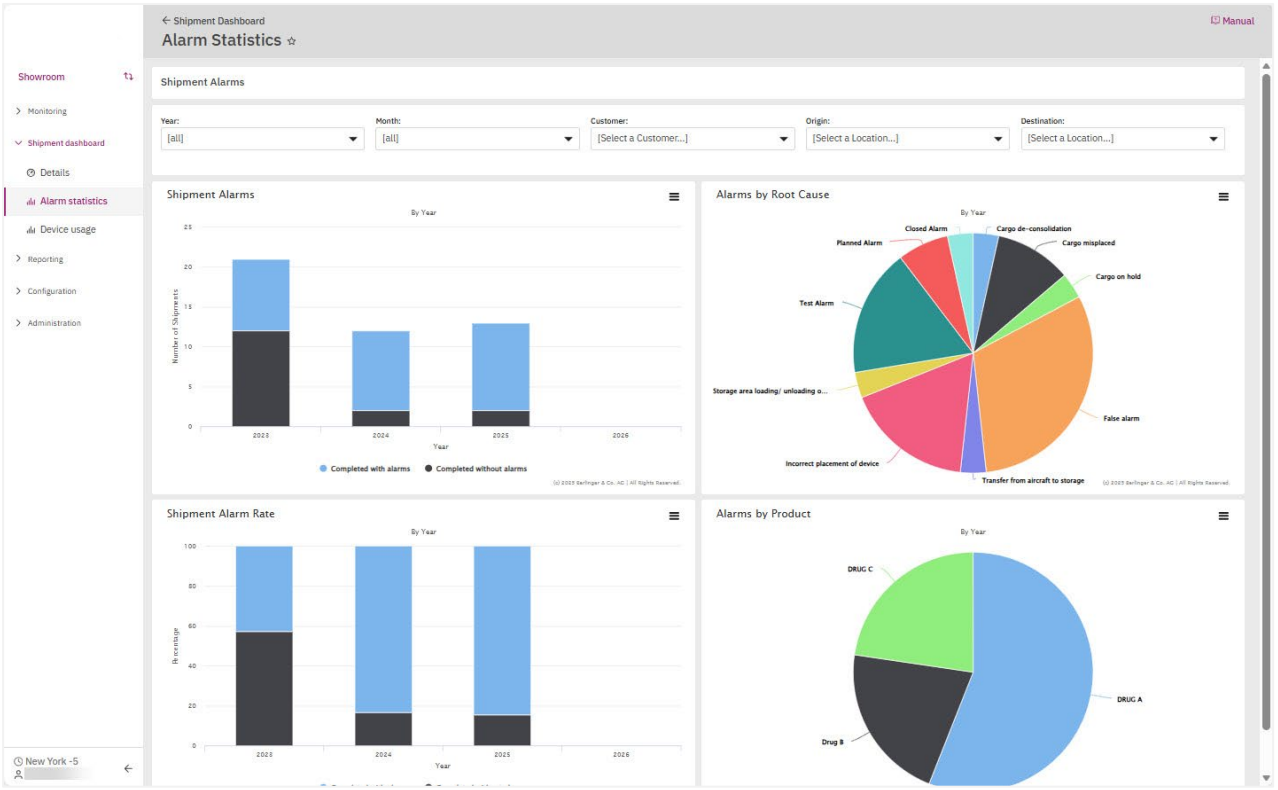
- Number of Shipments by Customer – Customers listed by name with corresponding shipment counts, represented as a pie chart.

You can filter dashboards by the following parameters:

- Year
- Month
- Customer
- Origin
- Destination

Alarm Statistics

From the left-navigation menu, click **Shipment Dashboard > Alarm Statistics** to view Alarm Statistics dashboard:



70: Shipment Dashboard > Alarm Statistics

Includes the following sections:

- Shipment Alarms: shows alarms triggered by timing or specific customers
- Alarms by Root Cause: displays categorization of alarms based on underlying reasons
- Shipment Alarm Rate: shows frequency-based classification of alarms
- Alarms by Product: displays alarms associated with shipped products

You can display Alarm Statistics based on the following filters:

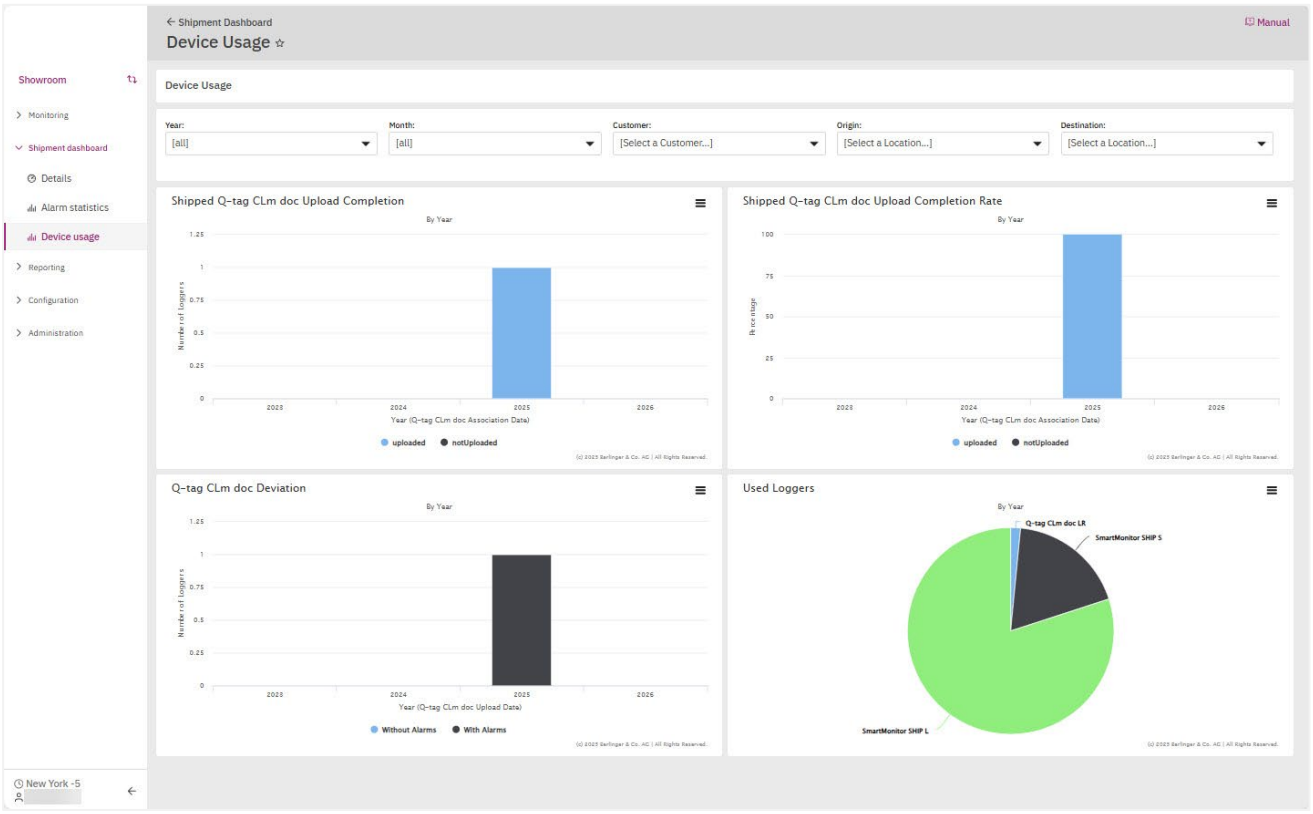
- Year

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- Month
- Customer
- Origin
- Destination

Device Usage

From the left-navigation menu, click **Shipment Dashboard > Device usage** to view device usage dashboard:



71: Shipment Dashboard > Device Usage

This dashboard includes the following sections:

- Shipped Q-tag CLm Document Upload Completion: shows which loggers were used and their current data status.
- Shipped Q-tag CLm Document Upload Completion Rate: indicates the transfer progress of logger data.
- Q-tag CLm Document Deviation: highlights loggers that have recorded any deviations.
- Used Loggers: a pie chart illustrating the types of loggers utilized over previous years.

You can view this dashboard by using the following filters:

- Year
- Month
- Customer

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- Origin
- Destination

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Reporting

The SmartView application offers reporting and analytics to help users easily review sensor data from their monitoring devices for shipments and facilities. Its module ensures access to sensor information, delivers summary data on monitored shipments, and supports customized analysis as needed.

Standard Reports

The reporting and analytics module let users review sensor data and run custom analyses.

From the left-navigation menu, click **Reporting** to view reports. The following reports are available for you:

- Trade lane report
- Location Report
- Alarms
- Manual Alarms
- Review
- Audit Trail
- Custom graph
- Shipment analysis

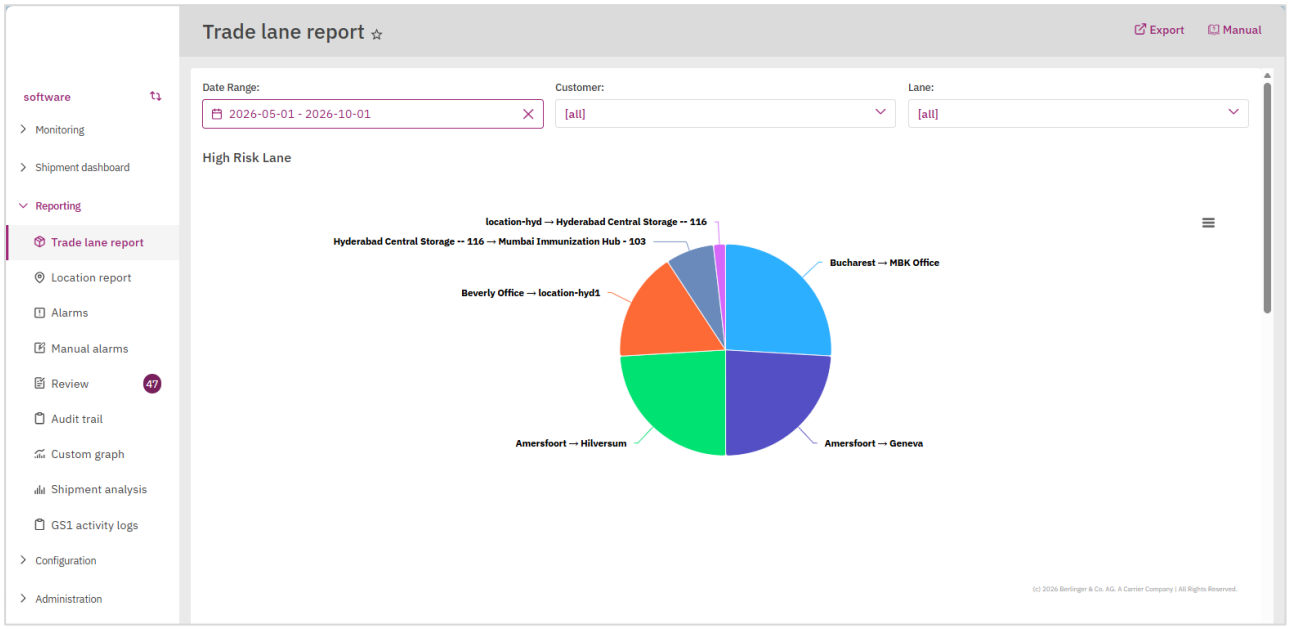
Trade Lane Report

The Trade Lane Report summarizes shipment performance across lanes (origin-to-destination route), helping users compare transit conditions, identify recurring alarms or deviations, and evaluate trends across multiple shipments.

To view the list of all the trade lanes reported by the system, in the main menu, click on **Reporting > Trade lane report**.

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A list will be generated, presenting all lanes currently registered within the system.



72: Reporting > Trade lane report

Filter this report by the following parameters:

- Date Range (default – last 30 days)
- Customer
- Lane

The report's pie chart is limited to displaying a maximum of 15 lanes.

A list of lanes displays below the pie chart and looks like the following:

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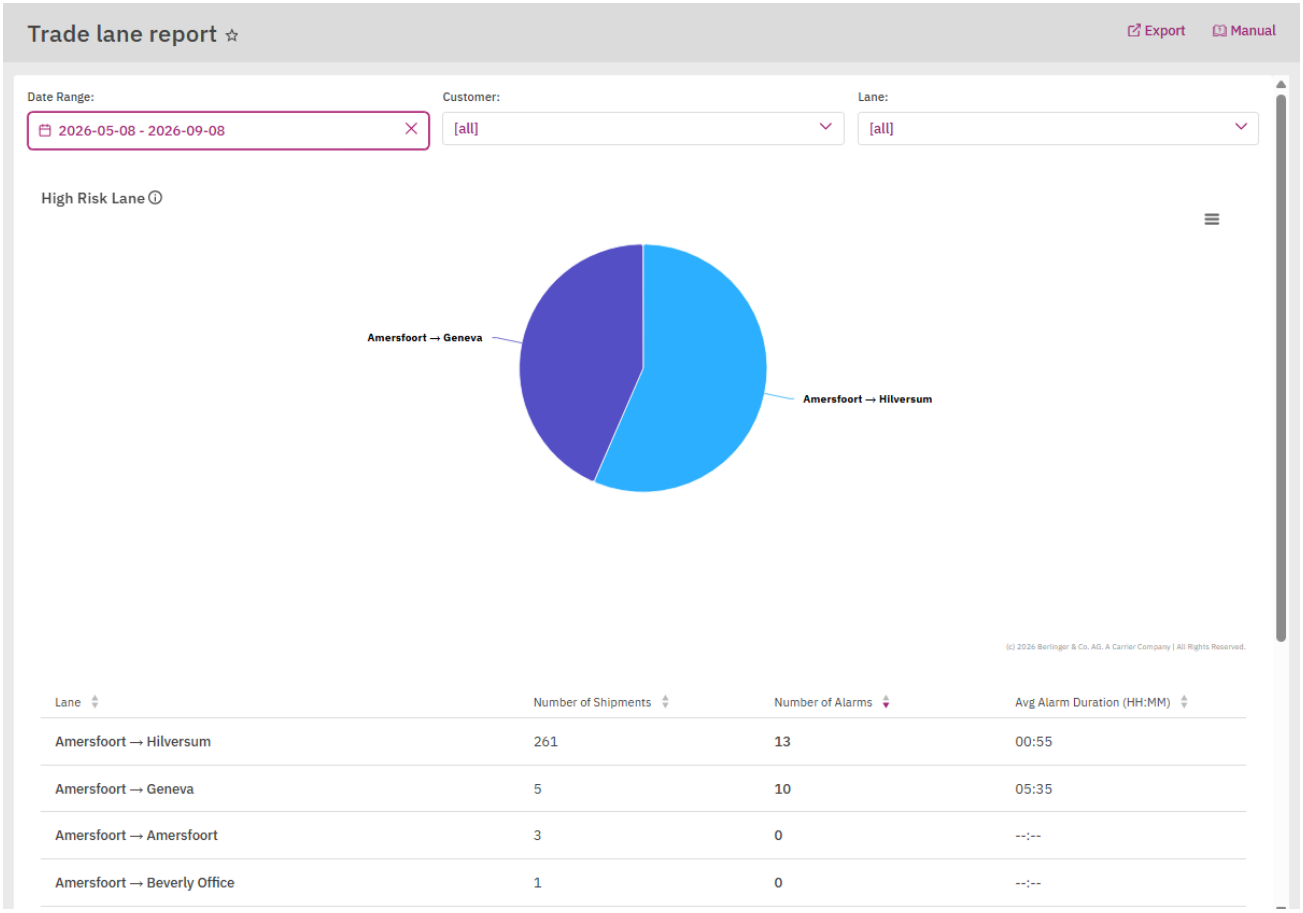


Figure 73: Trade lane report > lanes

The list includes the following information:

- Lane
- Numbers of Shipments
- Number of Alarms
- Avg Alarm Duration (HH:MM)

From the lane list, click on a lane to view more information. This will display a list of shipments that use this lane filtered by the Origin and Destination. For example, selecting a lane **Amersfoort > Bucharest** will display the following shipments from Amersfoort to Bucharest that use this lane and customer selection of the filters from the lane report:

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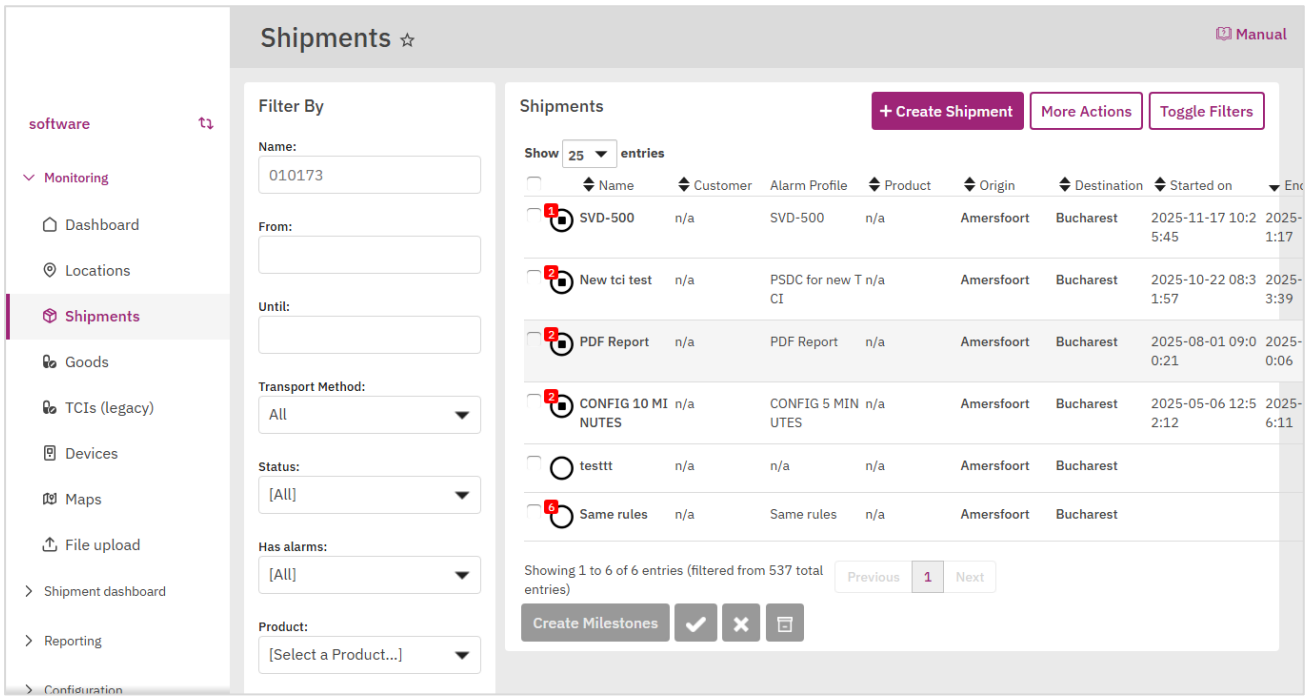


Figure 74: Lane Shipments > from the Trade lane report

Export Trade Lane Report

Click **Export** in the top-right corner of the report page to export the report data in CSV file based on selected filters.

Location Report

The Location Report summarizes monitoring data for a selected location and time period, helping users review location conditions, sector performance, alarms, and relevant events.

To view the list of all the trade lanes reported by the system, in the main menu, click on **Reporting > Location report**.

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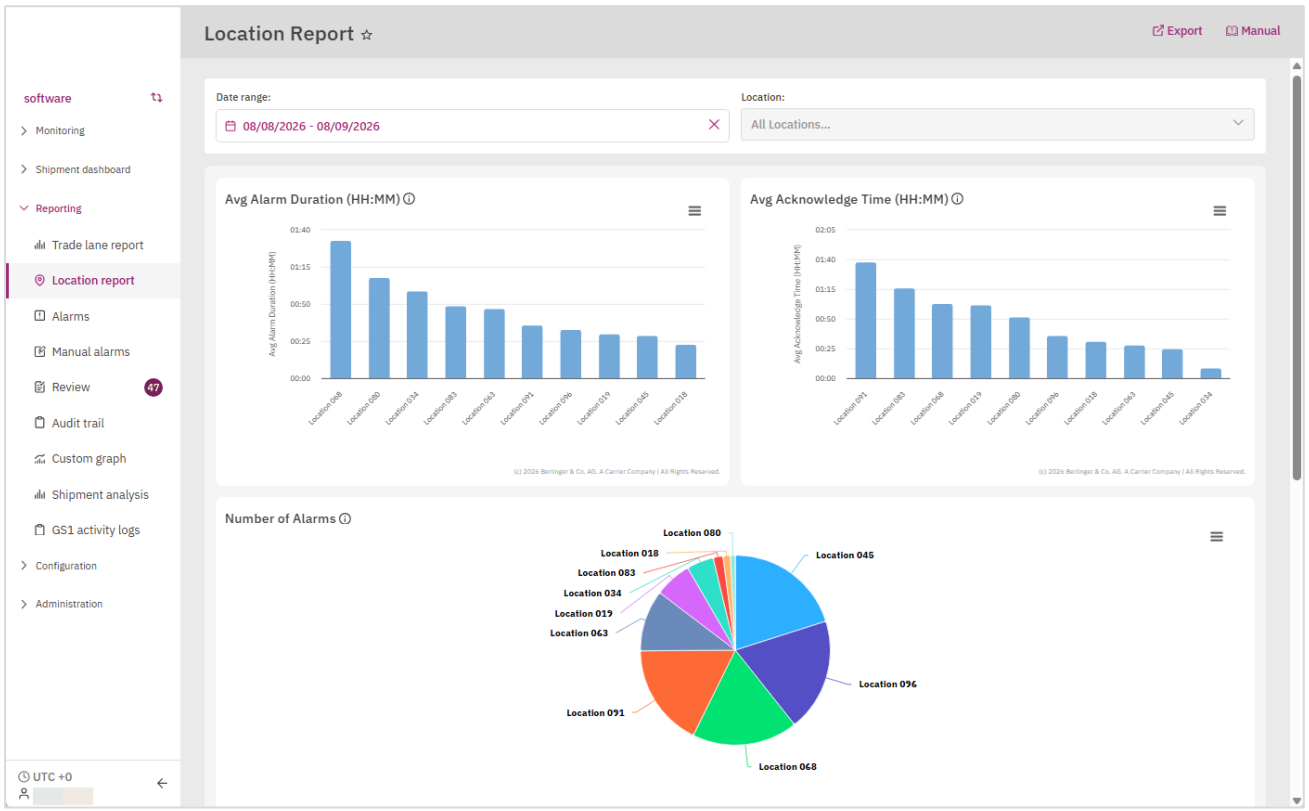


Figure 75: Reporting > Location report

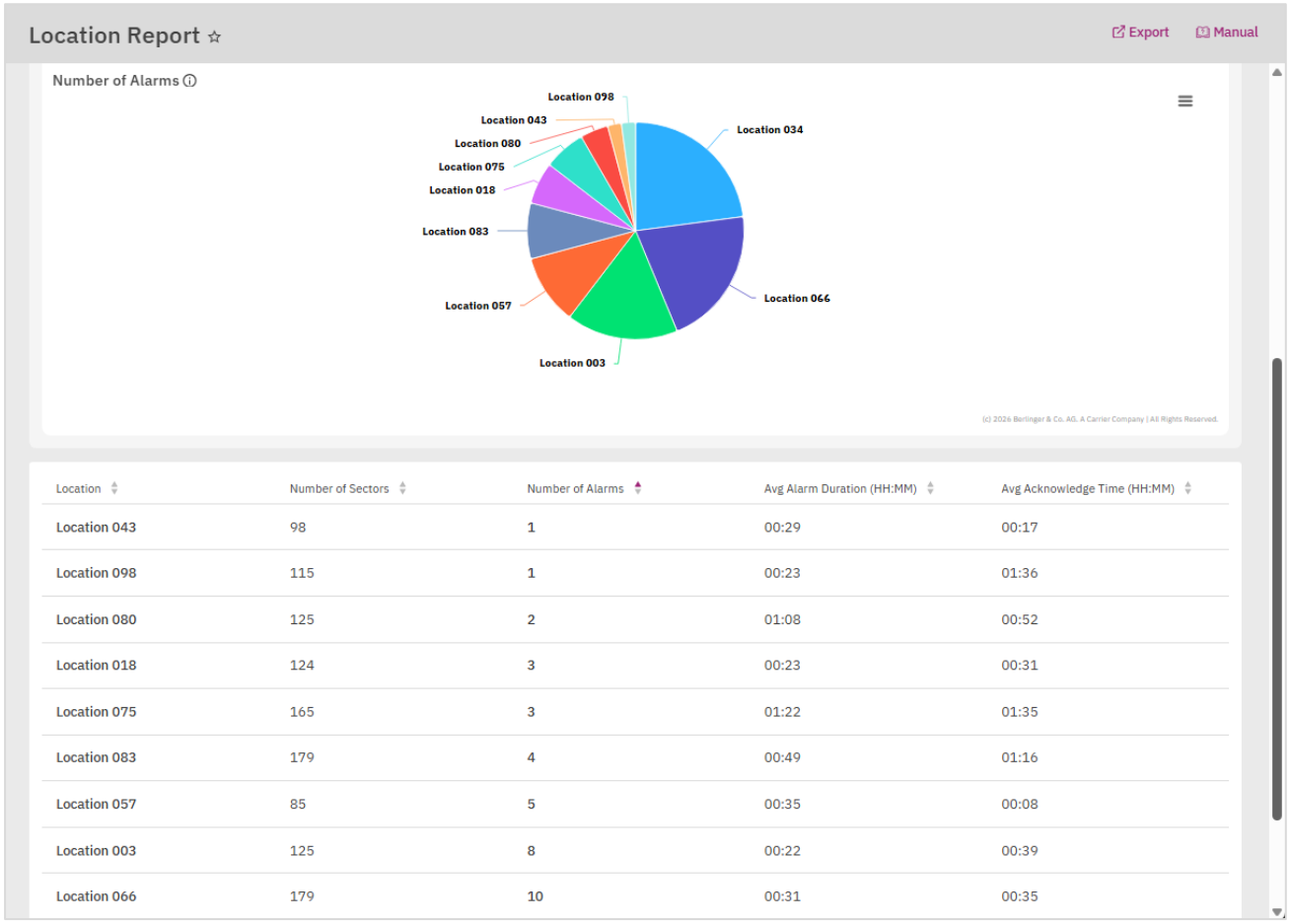
Location reports can be filtered by

- Date Range (default – last 30 days)
- Location

The report's pie chart is limited to displaying a maximum of 15 locations.

A list of locations displays below the pie chart and looks like this:

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Location	Number of Sectors	Number of Alarms	Avg Alarm Duration (HH:MM)	Avg Acknowledge Time (HH:MM)
Location 043	98	1	00:29	00:17
Location 098	115	1	00:23	01:36
Location 080	125	2	01:08	00:52
Location 018	124	3	00:23	00:31
Location 075	165	3	01:22	01:35
Location 083	179	4	00:49	01:16
Location 057	85	5	00:35	00:08
Location 003	125	8	00:22	00:39
Location 066	179	10	00:31	00:35

Figure 76: Location report > Location List

You can view the list of locations with the following information:

- Location
- Numbers of Sectors
- Number of Alarms
- Avg Alarm Duration (HH:MM)
- Avg Acknowledge Time (HH:MM)

Select a specific location to view details. The System displays Location page.

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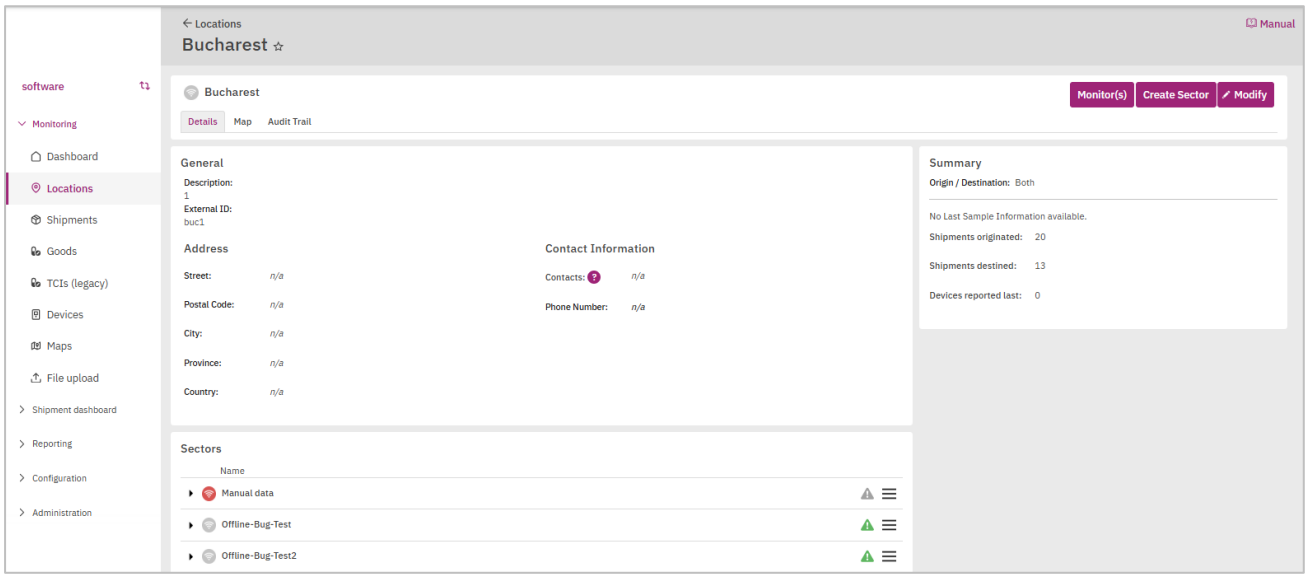


Figure 77: Location Page > from the Location report

Export Location Report

Click **Export** in the top-right corner of the report page to export the report data in CSV file based on selected filters.

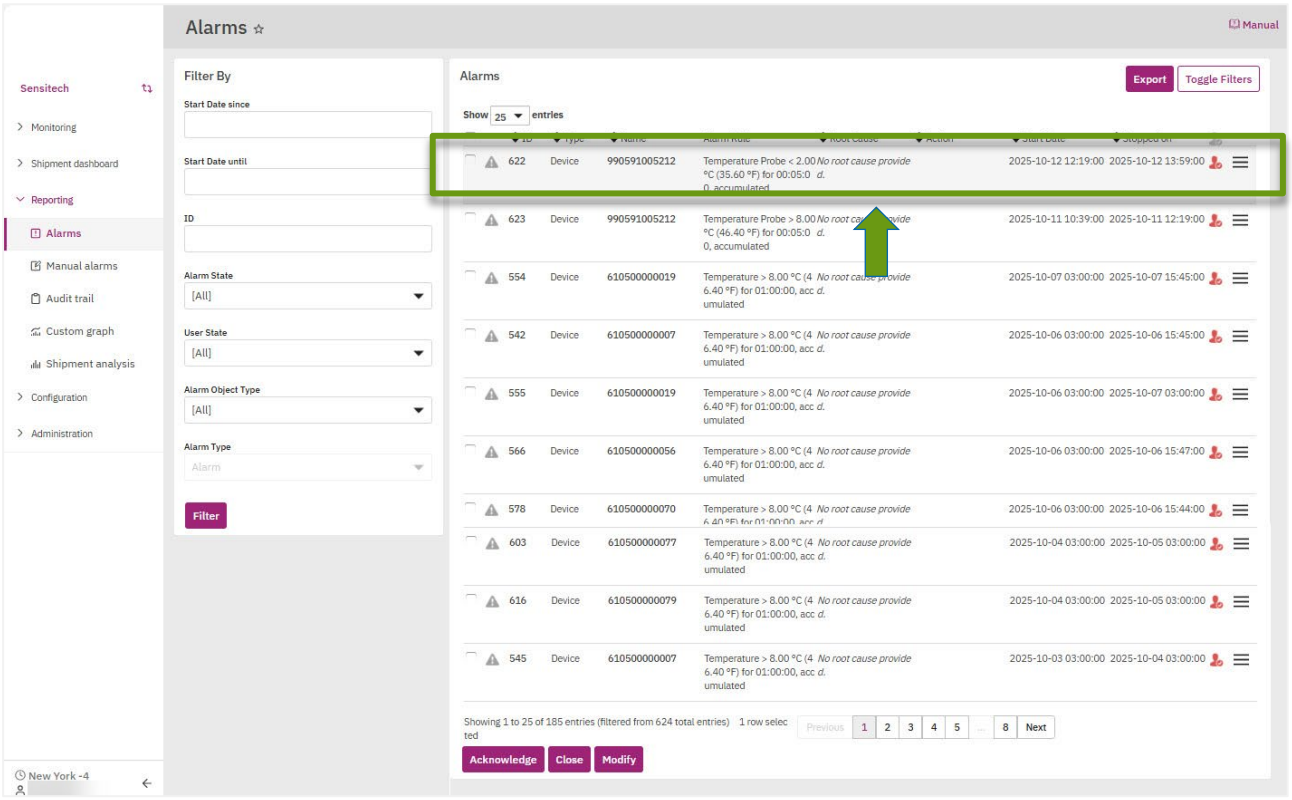
Alarms

SmartView's alarm management feature allows users to document, investigate, and process event alarms. Once an alarm is detected, notifications are sent to designated recipients who must evaluate, acknowledge, and close the alarm. Users can review alarm history by shipment or sector, record root causes and actions, and identify frequent issues to implement preventive measures. Alarms can be acknowledged to stop further notifications and closed to confirm resolution.

Alarm List

To view the list of all the event alarms reported by the system, in the main menu, click on **Reporting > Alarms**. A list will be generated, presenting all alarms currently registered within the system.

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78: Reporting > Alarms

Filter Alarm List

While viewing the list of alarms, you can filter the list to view specific alarms. Click **Toggle Filters** to select the select your filters. For example, if you select Active Alarms, it may return the list of alarms in active state, which may look like the following:



79: Reporting > Alarms – Active Alarms

You can also filter the alarm list by other parameters. For example, you can select to view only shipment alarms or only sector alarms by selecting the appropriate option from the **Alarm Object Type** field.

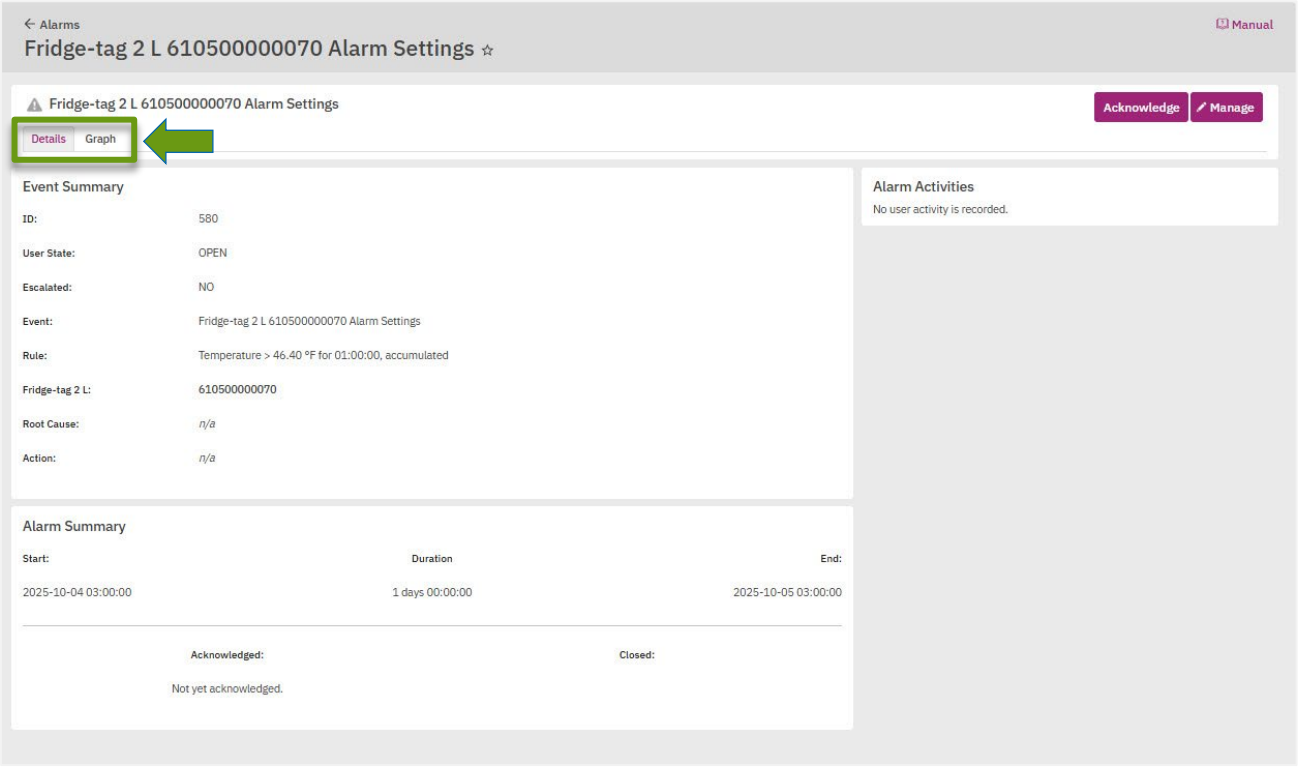
Export Alarm List

While viewing the list of alarms on the Alarm list page, user can export the list of alarms. Export and download the filtered excursions list as PDF or CSV files.

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Alarm Details Page

To view Alarm Details page, select an alarm from the Alarm List. The screen displays Alarm Details page that looks like the following:



80: Alarm Details Page

The screen includes the following tabs for an alarm:

- Details
- Graph

Details Tab

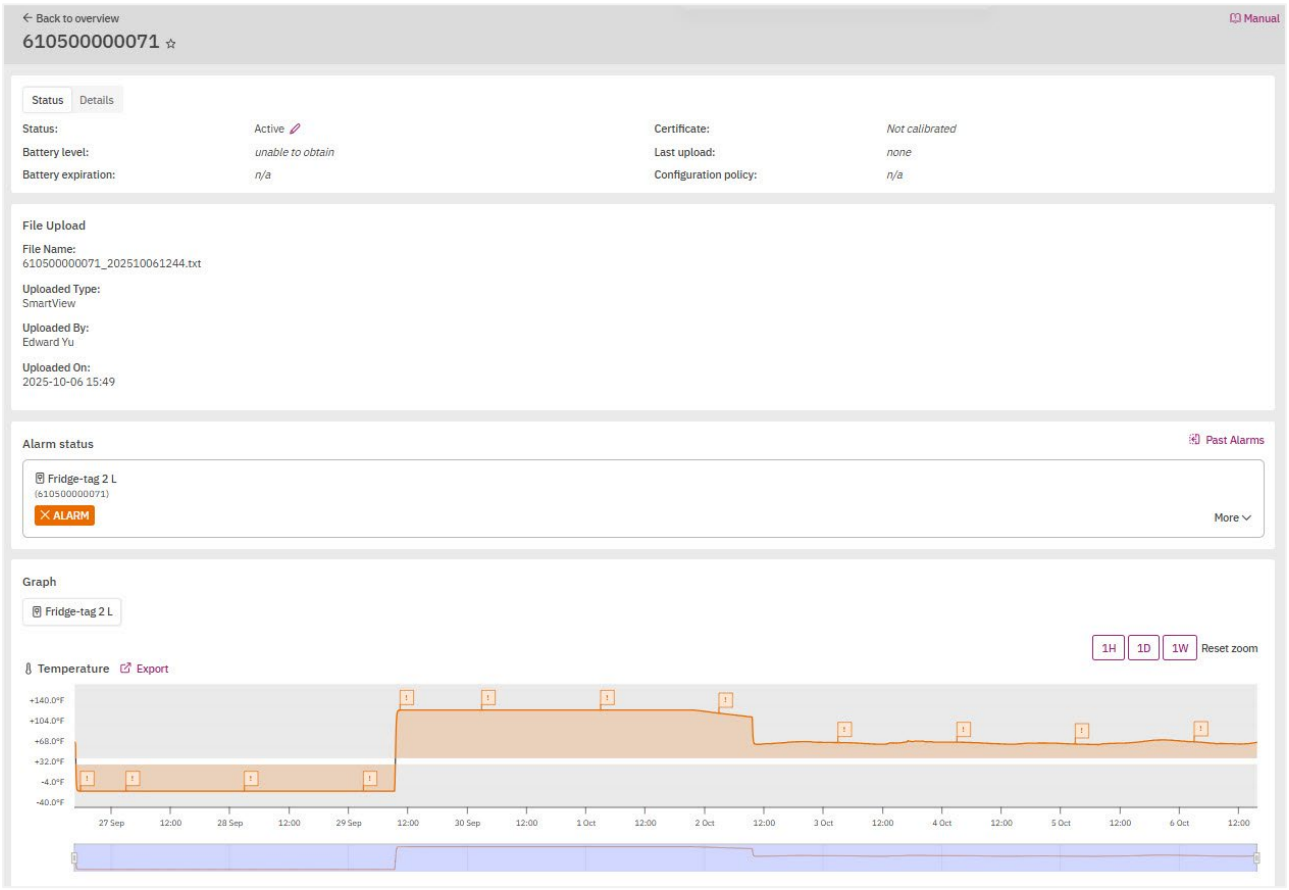
Details: Detailed information related to the alarm, such as related shipment or sector, related event, and rules of the event.

- Event Summary – alarm id, event that triggered the alarm, rule, root cause.
- Alarm Summary – information regarding the start and end time of the alarm, its duration, and whether it has been acknowledged or closed.
- Alarm Activities – user interactions with the alarm.

Graph Tab

Graph: Redirects to the specific temperature graph of the sector or the shipment where the alarm was identified.

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81: Reporting > Alarms – Alarm Details Page – Graph Tab

Actions

While viewing the Alarm details page, user can perform the following actions:



- Acknowledge
- Close
- Manage

Acknowledge Alarm

Alarms are marked with the  icon. You can acknowledge alarms in one of the following ways:

- From the Alarm List (**Reporting > Alarms**). Refer to figure *68: Reporting > Alarms.*
  - To acknowledge multiple alarms from the alarm list, select alarms from the alarm list and then click the **Acknowledge** button at the bottom of the list.
  - To acknowledging a single alarm, you can select the alarm in the Alarm List and then select the **Acknowledge Alarm** option from the  Action Menu.

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- From **Reporting > Alarms – Alarm Details** page, click **Acknowledge**. Refer to the figure *70: Alarm Details Page.*

Confirmation message will ask you to confirm alarm confirmation. Click **OK** to confirm.

When an excursion is acknowledged, SmartView emails recipients with details on who confirmed it, who received updates, the excursion's description, root cause, and actions taken. No further notifications are sent for that incident, as it is considered resolved.

Close Alarm

An alarm can be closed after the situation has been resolved and corrective measures have been implemented. The alarm must first be acknowledged by the user before it can be closed. Closing an alarm serves to record that the situation was handled appropriately.

Alarms should not be closed if the situation is still ongoing.

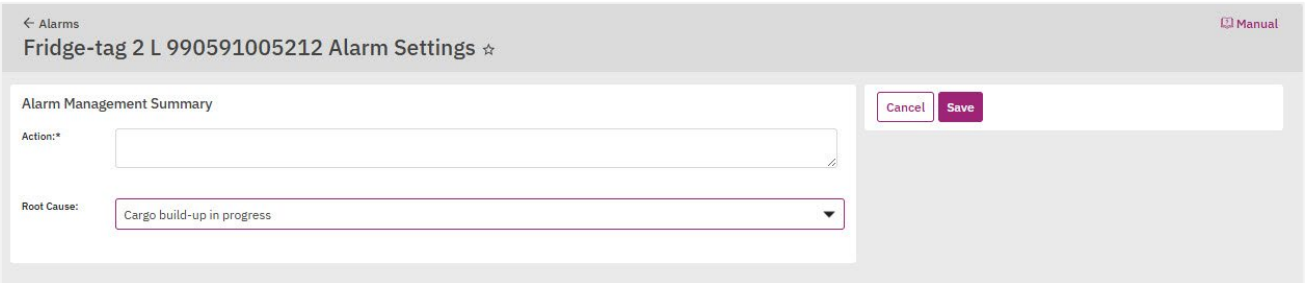
To Close an Alarm, select a single or multiple alarms from the Alarm list and then click **Close** button at the bottom of the list.

Modify Alarm

To modify alarm, open Alarm page in the modify mode. You can do this in one of the following ways:

- From the Alarm List, select an alarm or multiple alarms from the list and then click the **Modify** button at the bottom of the screen.
- From the Alarm List, select a single alarm and then select **Modify Alarm** option from the Action Menu.

Alarm page opens in the modify mode where you can make add corrective action or add root cause:

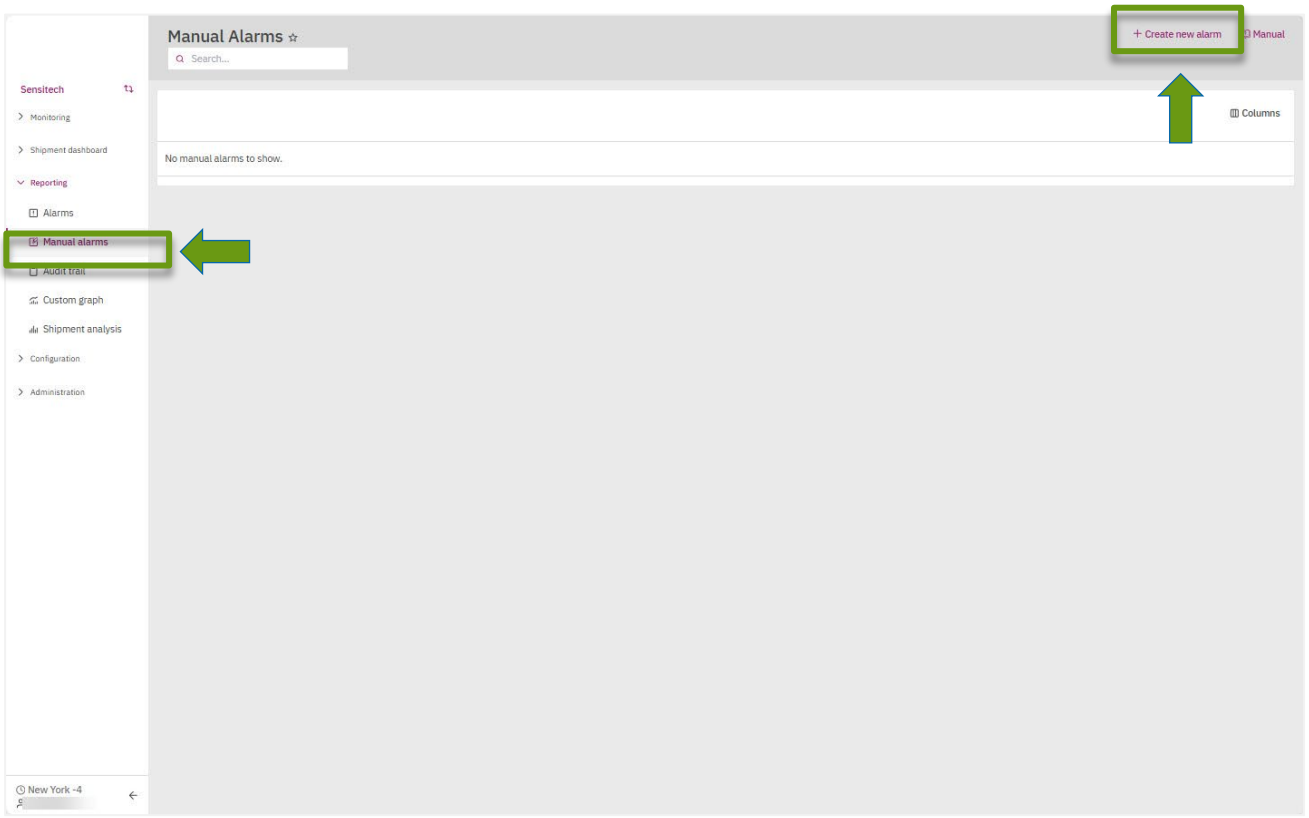


82: Alarm Page – Modify

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Manual Alarms

To add an alarm to a TCI from an environment that is not monitored by a Sensitech-supported device, utilize the manual alarms option. This functionality enables prompt addition of excursions to TCI. You may access this feature through the **Reporting** sub-menu.

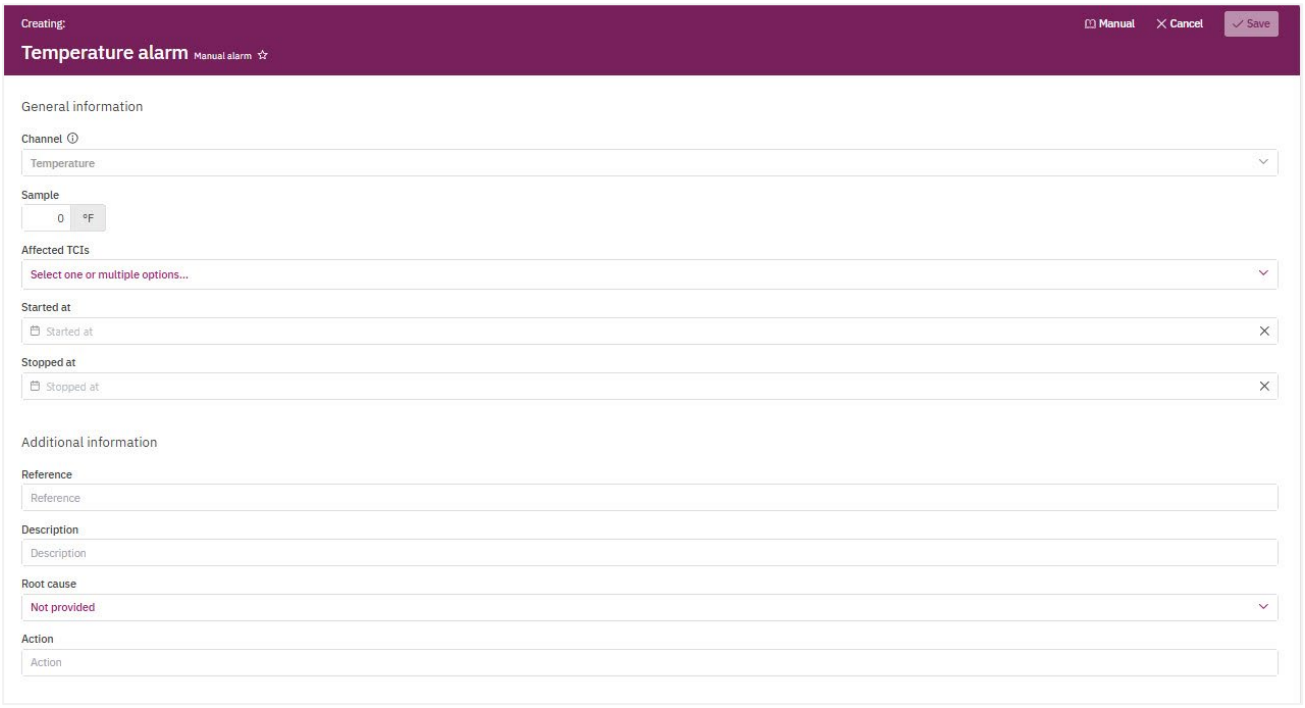


83: Reporting > Manual Alarms

When accessing this tab, you will be able to access all already present Manual alarms. Create new Manual alarms by pressing the **Create new alarm** button.

A new Manual Alarm window displays:

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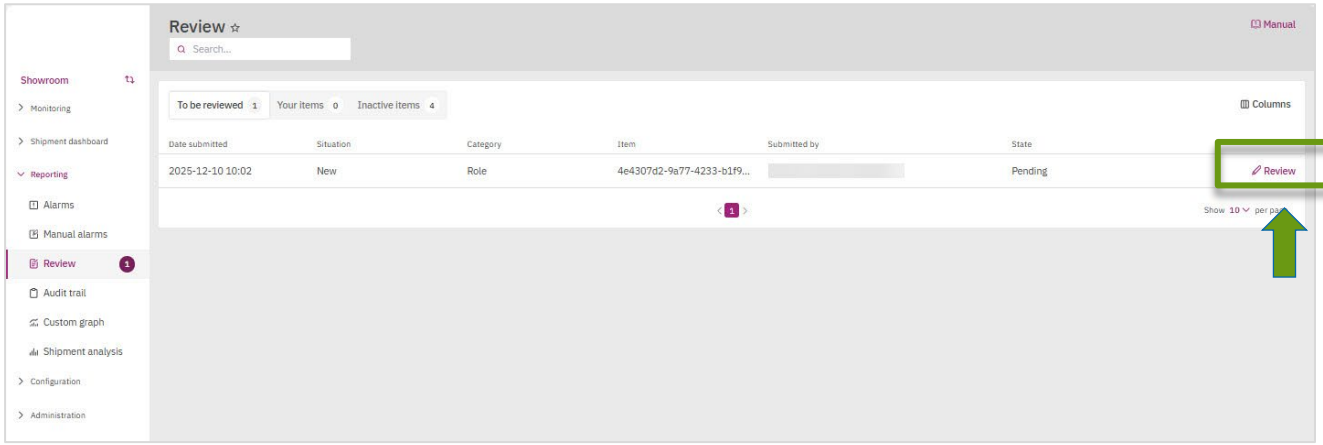
84: New Manual Alarm

The excursion record documents temperature, time, root cause, and mitigation actions. Temperature data is automatically incorporated into the relevant TCIs to facilitate recalculation of the stability budget. The update process varies according to the number of affected TCIs. Data entries are added to each TCI along with flanking values to ensure accurate calculation of the stability budget.

Review

Review management is a feature that customers can activate. It follows the "four eyes" principle, requiring two individuals to approve changes to certain entries, such as roles and configuration policies. The system records changes made by one person and waits for a second person to review and approve them before saving the changes to the database.

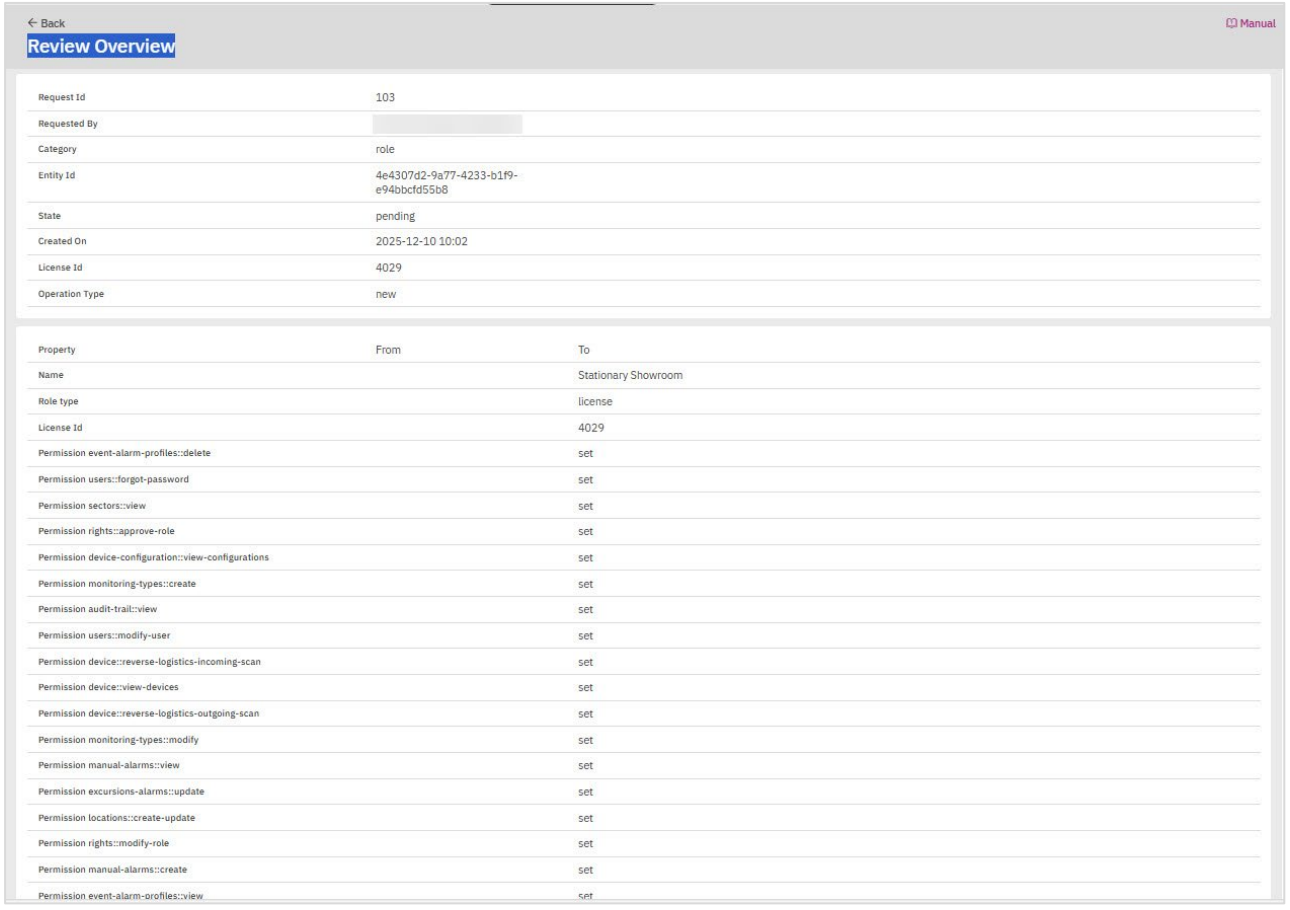
© Carrier. All Rights Reserved.



85: Reporting > Review

From the Review list, select a review and then click **Review**.

The review overview page displays:



86: Review Overview

The Review Overview is a summary page that presents key information about the report or record selected for review. This page typically displays essential details such as the status of the review, relevant data entries, and any associated notes or actions required. Its purpose is to give users a clear, high-level understanding of the context and contents of the record being

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reviewed, allowing for efficient validation and decision-making before proceeding with more detailed analysis.

Audit Trail

The Audit Trail Report provides a chronological record of user and system activities, including the action performed, the affected item, any recorded changes, the responsible user, and the timestamp.

From the left menu select **Reporting > Audit trail** to display available custom graphs. A screen similar to the following displays:

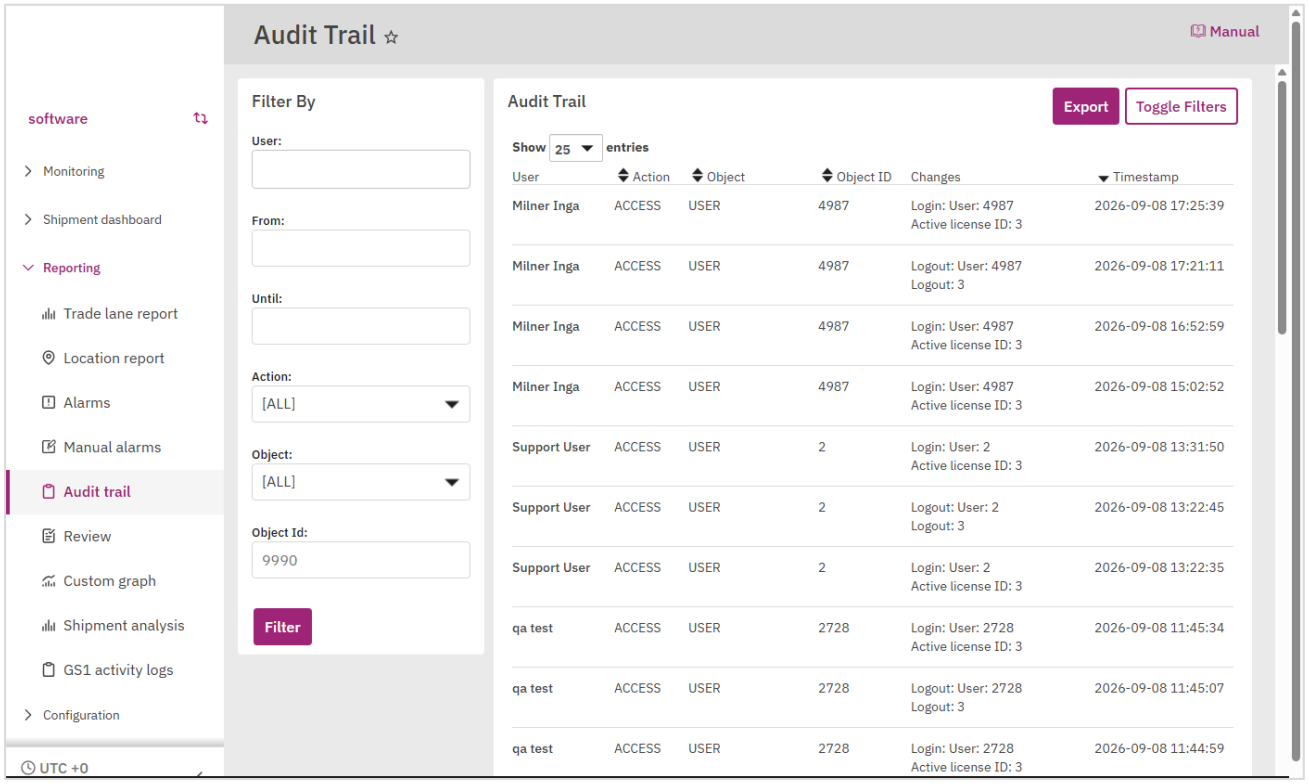


Figure 87: Reporting > Audit Trail

Filter Alarm List

You can filter Audit Trail report based on the following parameters:

- User
- From (date) – start date
- Until (date) – end date
- Actions:
  - Created
  - Updated
  - Deleted
  - Access

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- Objects – select on of the available objects such as
  - Alarm Profile
  - Alarm Rule
  - Clinical Trial
  - Device
  - Event
  - File
  - Fridge-tag 2 L Action
  - Graph Note
  - Group Item
  - Group Item Configuration
  - Group Item Device
  - Group Item Monitoring
  - Group Item Type
  - Group Item Type Batch
  - Group Item Type Property
  - Location
  - Node Configuration Template
  - Packing System
  - Product
  - Range Settings
  - Sector
  - Sector Milestone
  - Settings
  - Shipment
  - Shipment Association
  - Shipment Milestone
  - Storage Condition
  - TCI
  - User
  - User Restriction Carrier
  - User Restriction Customer
  - User Restriction Location
  - User Right
- Object ID

Export Audit Trail

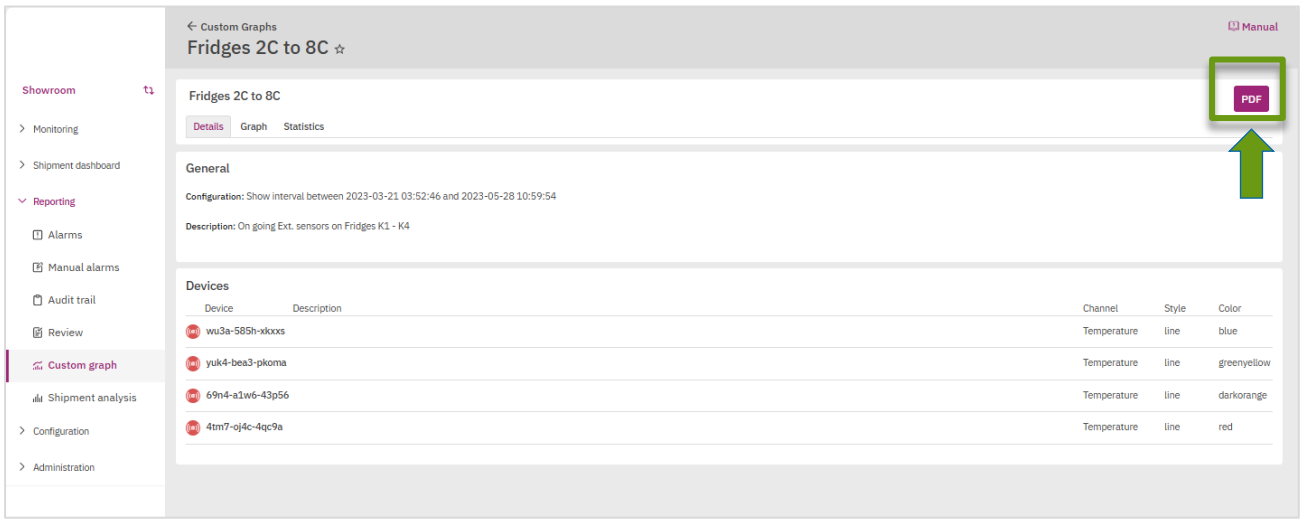
While viewing the list of alarms on the Audit Trail list page, user can export the list of entries. Export and download the filtered excursions list as PDF or CSV files.

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Custom Graph

Custom graphs are helpful for comparing device data. For instance, you can use them to examine differences between various sections of a warehouse or to compare the performance of two refrigerators during a specific time frame.

From the left menu select **Reporting > Custom graph** to display available custom graphs. A screen similar to the following displays:



88: Reporting > Custom Graphs

Select a custom graph from the list to view graph details or create a new custom graph by clicking on the Create Custom Graph.

Click **PDF** to download custom graph in the PDF format.

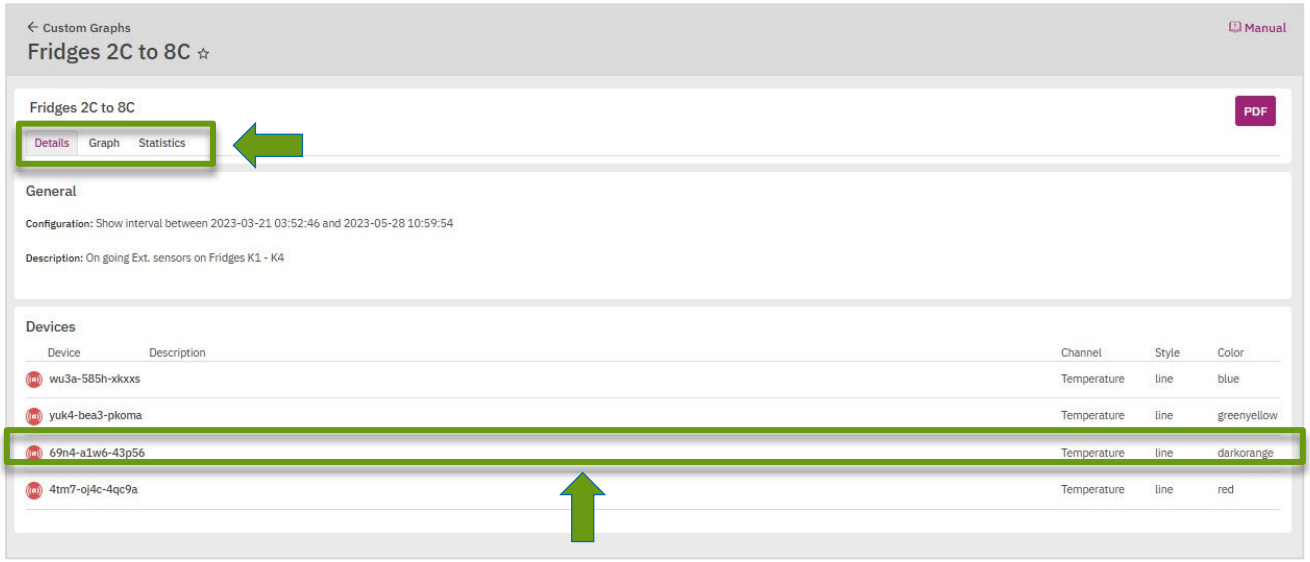
Custom Graph Overview Page

This section describes Custom Graph Overview page.

Detail Tab

The detail page provides an overview of the devices selected in the custom graph. It also indicates the color assigned to each device in the graph.

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89: Custom Graph Overview Page – Details Tab

In the Devices section, select to view a device. The system opens the Device page where you can view more information about device status, graphs, and device association. Refer to the *Devices* section for more information about devices.

Graph Tab

SmartView provides the capability to create a Custom Graph by overlapping the data from multiple sensors in order to perform an analysis of several used monitoring devices.



90: Custom Graph Overview Page – Graph Tab

The Custom Graph can incorporate and merge data from sensors of either the same or different types (such as Q-Tag) into one unified graph. Each Custom Graph displays an overlay of temperature readings from multiple sensors, allowing you to view the varying sensor values together in a single graph.

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For more information about graphs in SmartView, please refer to *Graphs* section in Common Elements in SmartView.

Usability

If the graph uses real-time sensor data, Custom Graph lets you define the time period for included data. For Q-Tag USB logger devices, the graph automatically overlays data based on the device's start and end times.

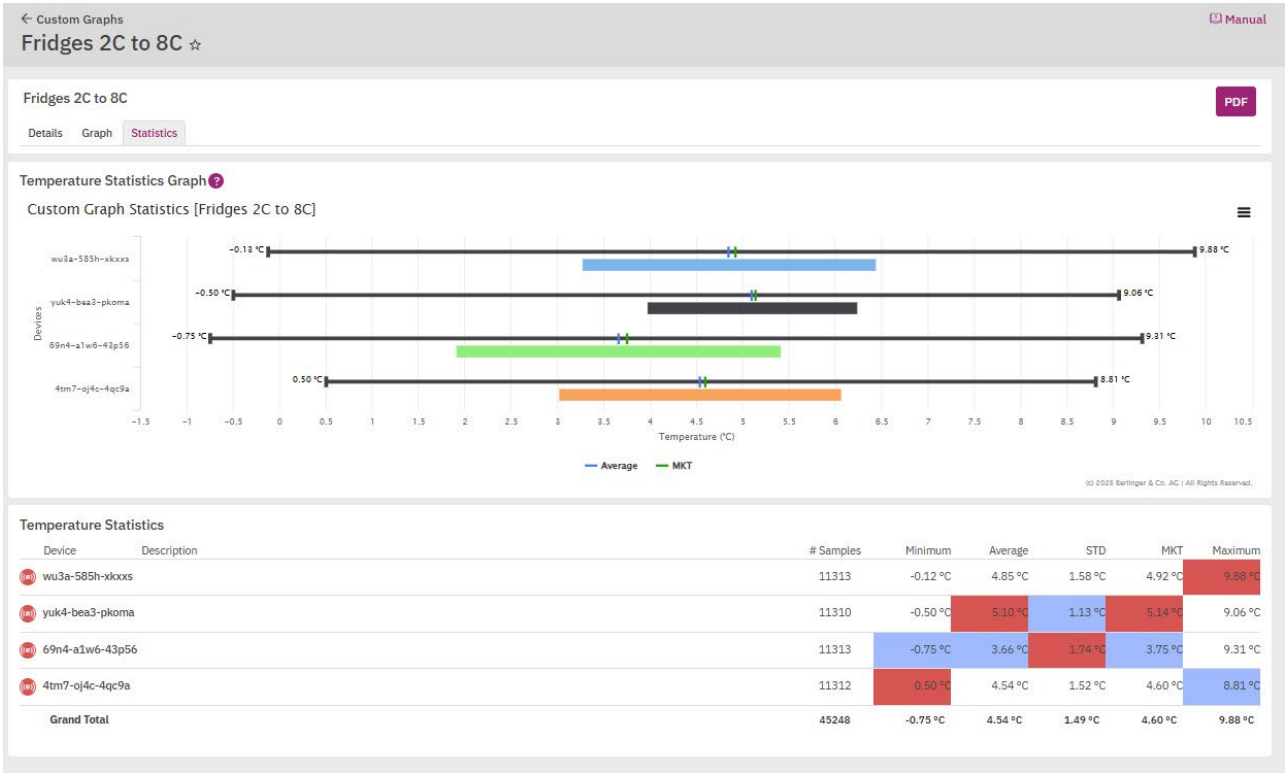
Users can create a Custom Graph by choosing up to 100 sensors to analyze or compare their data. It's often used for thermal mapping in temperature-controlled areas, recalibrating sensors, or running tests with many sensors.

Graph Zoom

To learn how to zoom on a specific area of the graph, refer to the *Graph Zoom* section of this manual.

Statistics Tab

Statistical tab shows the statistical information in a table format, with an easy indication of the lowest and highest maximum, etc.



91: Custom Graph Overview Page – Statistics Tab

For more information about the Statistics view please refer to the *Statistics* section.

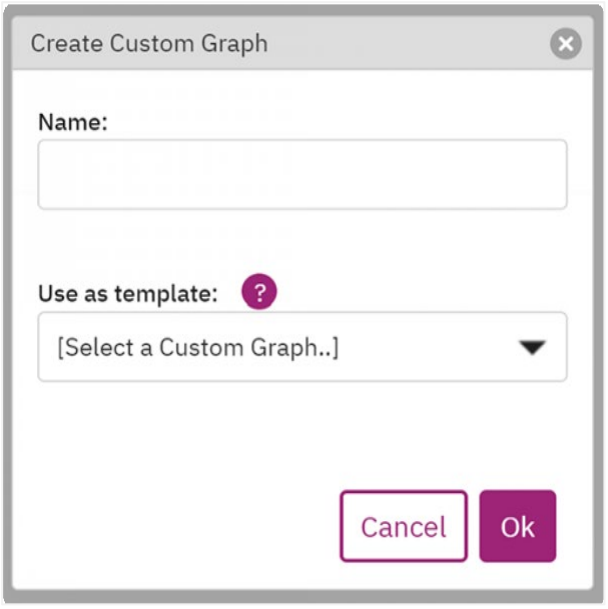
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Create Custom Graph

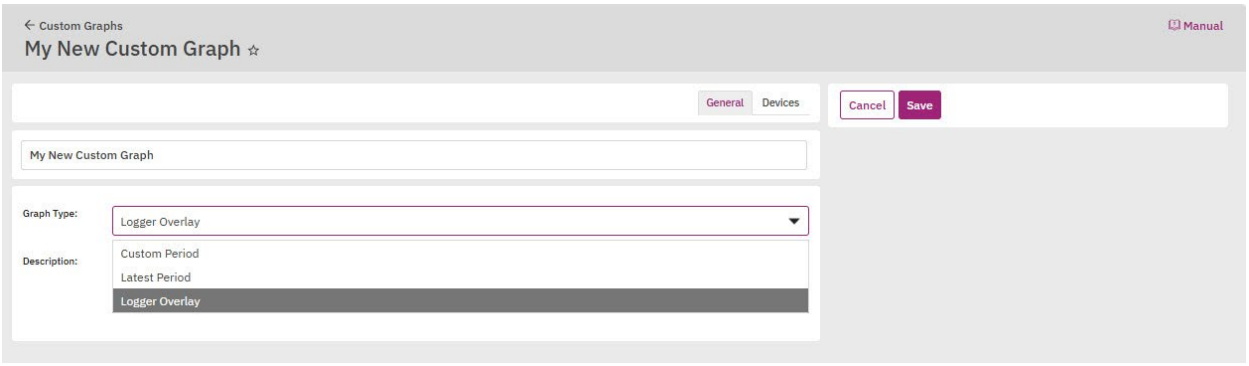
This section describes how to add a new custom graph.

1. To create a new graph, in the **Reporting > Custom Graph**, click **Create Custom Graph**.

   A new window will pop-up allowing us to enter a name for the new graph as well as the option to select another custom graph as a template if one is available.



2. In the **General** tab, select one of the available options for a graph type:



92: Create Custom Graph

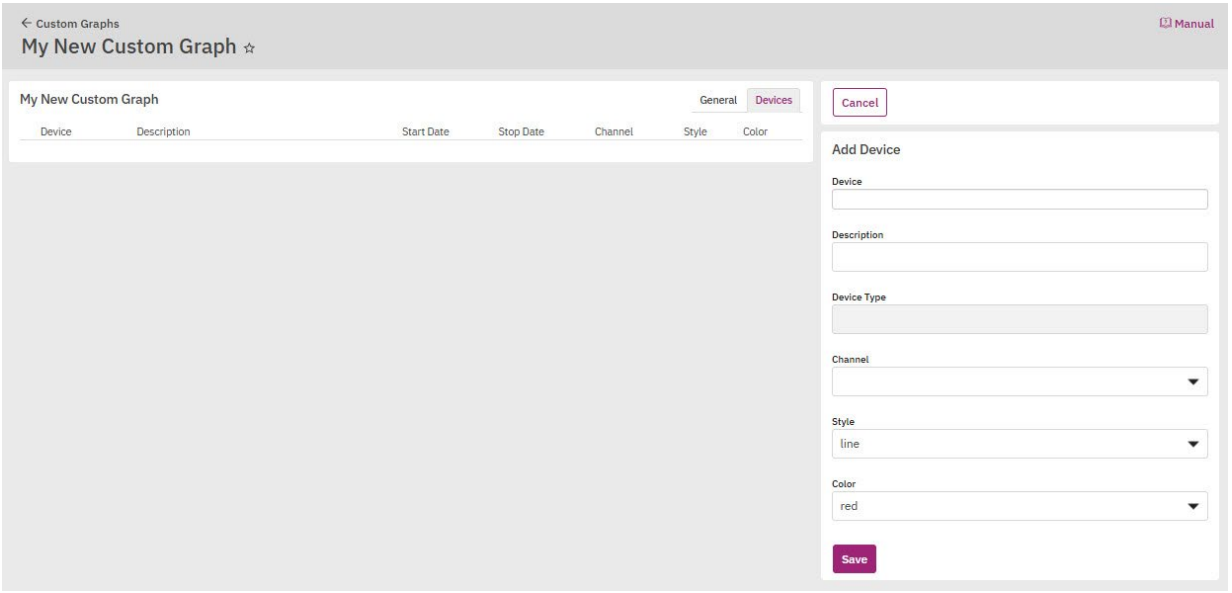
Name	Description
Custom Period	This allows to create of a custom graph for a specific time period for non-Q-tag devices
Latest Period	This allows creating a custom graph for the latest period for non-Q-tag devices
Q-tag Overlay	This allows us to create a custom graph for Q-tag devices

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If a custom period is selected as an option, the duration can either be limited with the duration modifier or the specific end date. If both parameters are entered the end date will be used.

3. Switch to the **Devices** tab.

   The following view will be available to add devices to the custom graph.



93: Create Custom Graph – Devices Tab

Modify Custom Graph

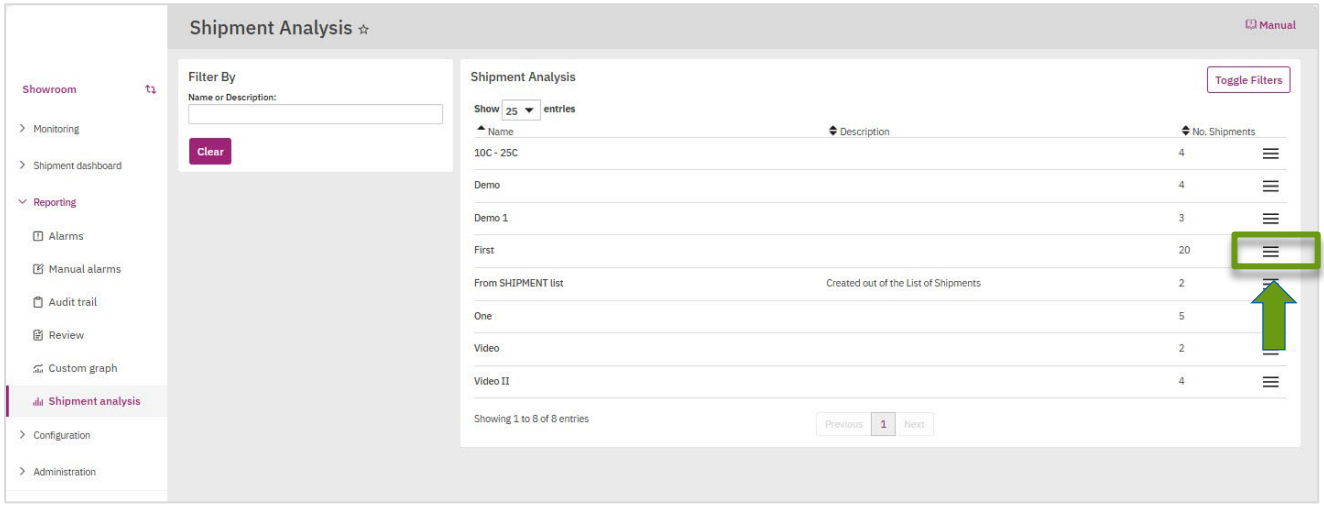
To modify a custom graph, press  within the custom graph overview and then select **Modify Custom Graph**.

Shipment analysis

The Statistics tab provides a statistical analysis of shipments that have been monitored with SmartView and enables users to overlay multiple shipments in a single graph.

From the left menu select **Reporting > Shipment analysis** to display available custom graphs. A screen similar to the following displays:

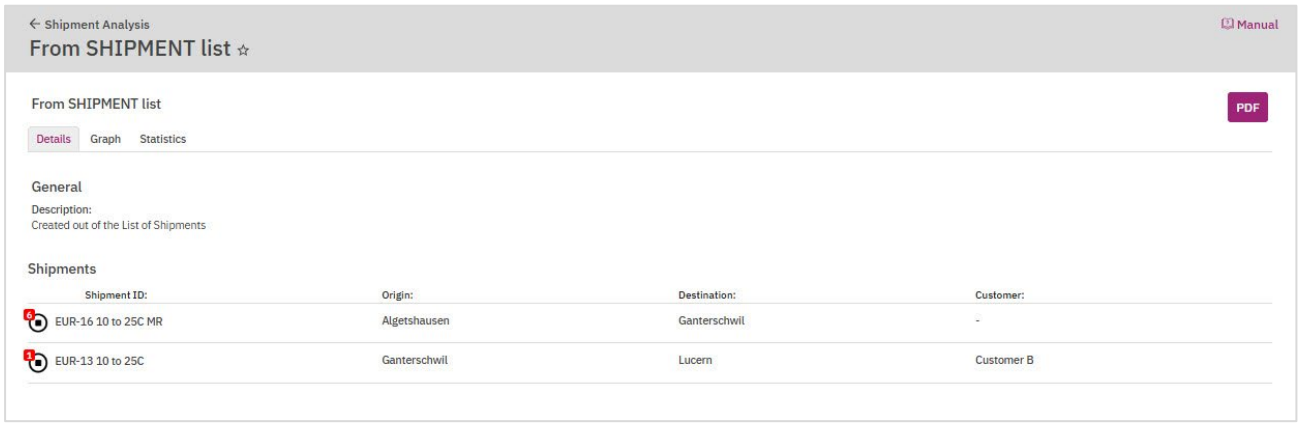
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94: Reporting > Shipment analysis

Shipment Analysis Page

Select a report you want to view and then select **View Shipment analysis** from the ☰ Action Menu. The shipment analysis page displays:



95: Reporting – Shipment analysis Page – Details Tab

Each Shipment Analysis Report contains the following elements:

- Details page with general information
- Graph – overlay of the temperature graph of the various shipments.
- Statistics – statistical analysis of these shipments.

The Shipment Analysis Report is generated manually by selecting the specific shipments that need to be included in the analysis. This functionality can be accessed directly from the menu option or from the shipment overview screen.

Details Tab

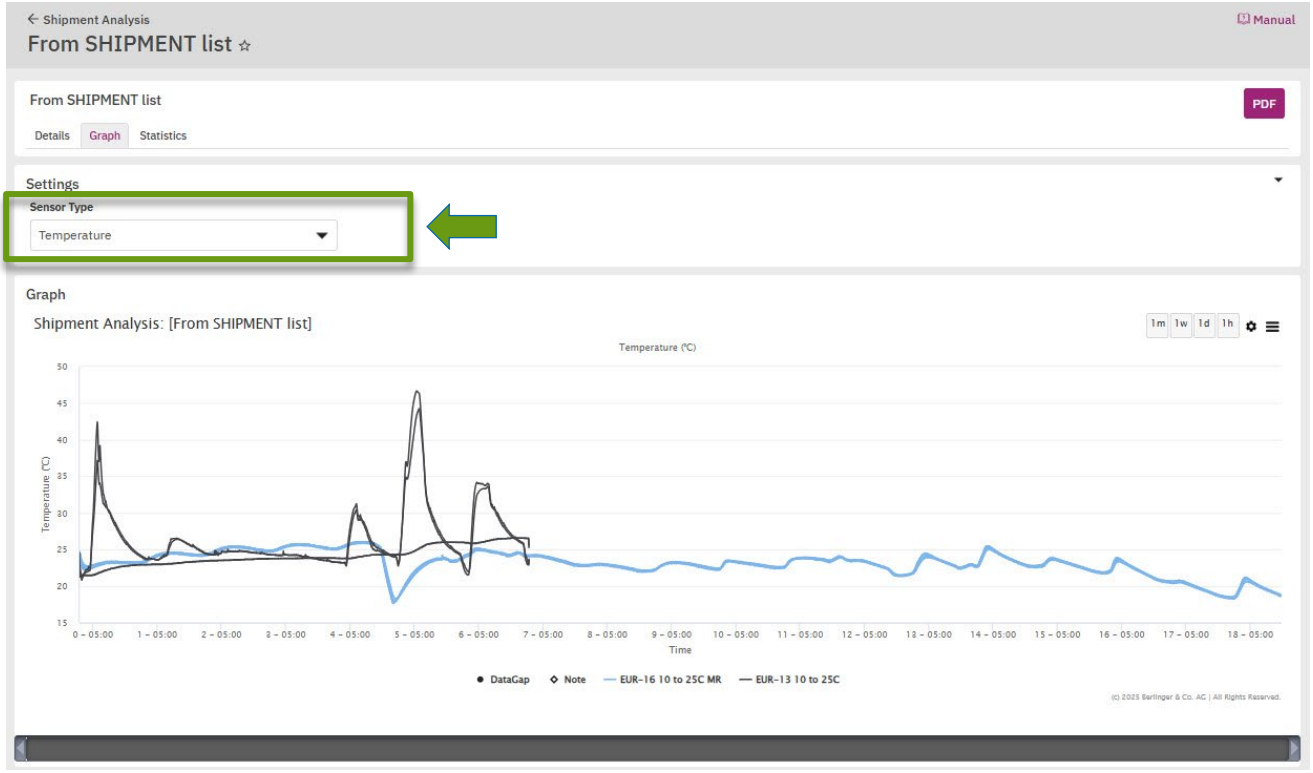
In this tab, user can see which shipments are included in the analysis. Refer to figure *88: Reporting – Shipment analysis Page – Details Tab* on page *143*.

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Graph Tab

The Graph tab combines data from the shipment list found in this shipment analysis report into a single, unified graph. It overlays temperature readings from multiple shipment devices, enabling you to view all values together within one graph.

User can view this information by sensor type selected in the **Sensor Type** field (Settings section). For example, for this report, 2 sensors are available – temperature and humidity.



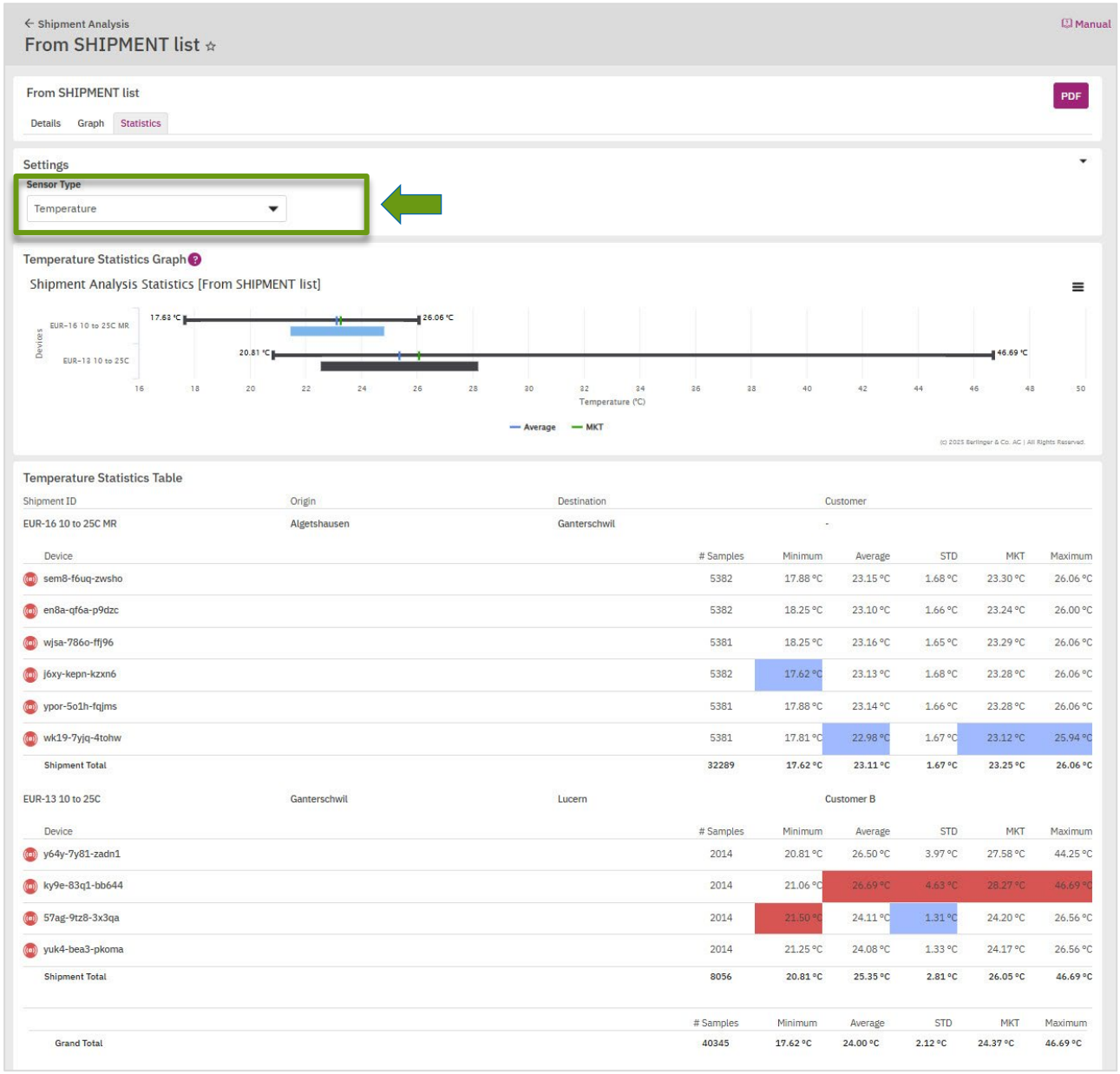
96: Reporting – Shipment analysis Page – Graph Tab

For more information about graphs in SmartView, please refer to *Graphs* section in Common Elements in SmartView.

Statistics Tab

Statistical tab shows the statistical information the shipment list found in this shipment analysis report. User can view this information by sensor type selected in the **Sensor Type** field (Settings section). For example, for this report, 2 sensors are available – temperature and humidity.

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97: Reporting – Shipment analysis Page – Statistics Tab

Additional Reporting Capabilities

In addition to standard reports available in the Reporting tab, there are other reporting data that you can obtain from various sources of the application. The following table describes these capabilities:

	Description	How to create	How to use	How to share

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Shipment Report	Report on each individual shipment. Includes temperature graph, excursion information and milestones.	Automatically created for each shipment	Evaluate the complete information about an individual shipment	Online or in PDF format.
Custom graph	Report that combines data from multiple sensors.	Manually, by selecting specific sensors	For specific tests such as thermal mappings.	Online or in PDF format.
Shipment Analysis Report	Report that provides a statistical analysis and overlays of multiple shipments (maximum 20)	Manual, by selecting specific shipments or directly from the View:Shipments	For example, to analyze the performance on a specific shipping lane or from a specific transportation company.	Online or in PDF, JPG, or Excel format
Shipment Dashboard	Aggregated information about excursions, transportation and the monitoring process	Automatic	For trend analysis, for example on the number of shipments with excursions.	Online and by e-mail subscription

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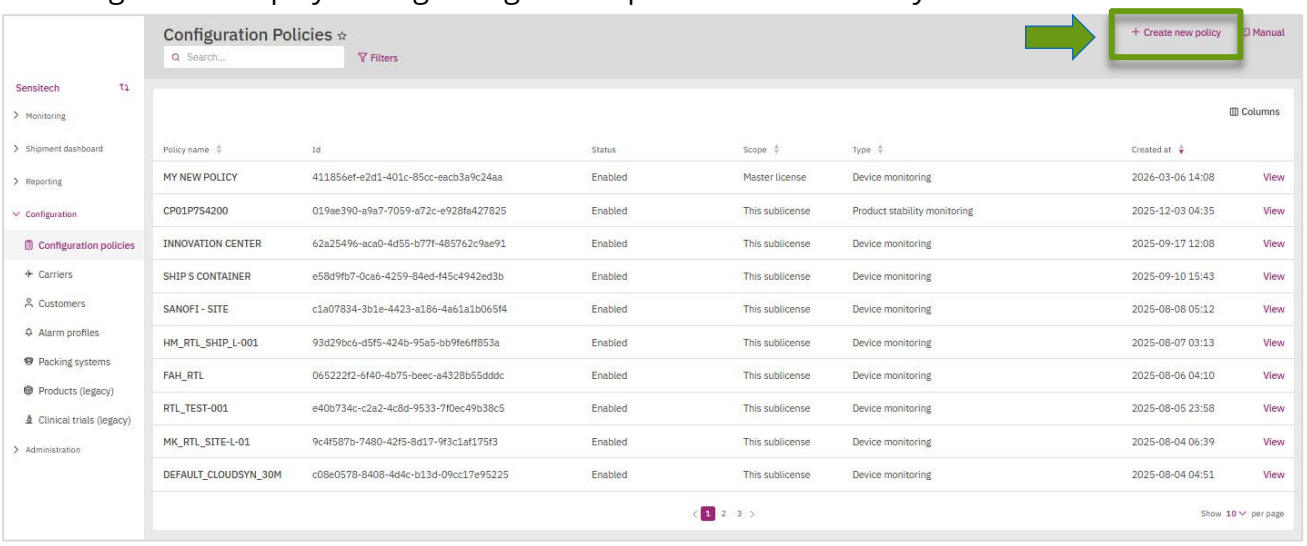
Configuration

This table summarizes SmartView Functions

Configuration Policy

A configuration policy specifies the settings used by a device, product, sector, or shipment.

To view a list of Configuration policies, select **Configuration > Configuration Policies**. The following screen displays listing configuration policies available for your license:



98: Configuration Policies

If an appropriate configuration policy is already in place, this step may be omitted. Otherwise, please refer to the instructions provided below.

Create New Configuration Policy

1. In the Configuration Policies screen, review Create the new configuration policy by pressing **Create new policy.**

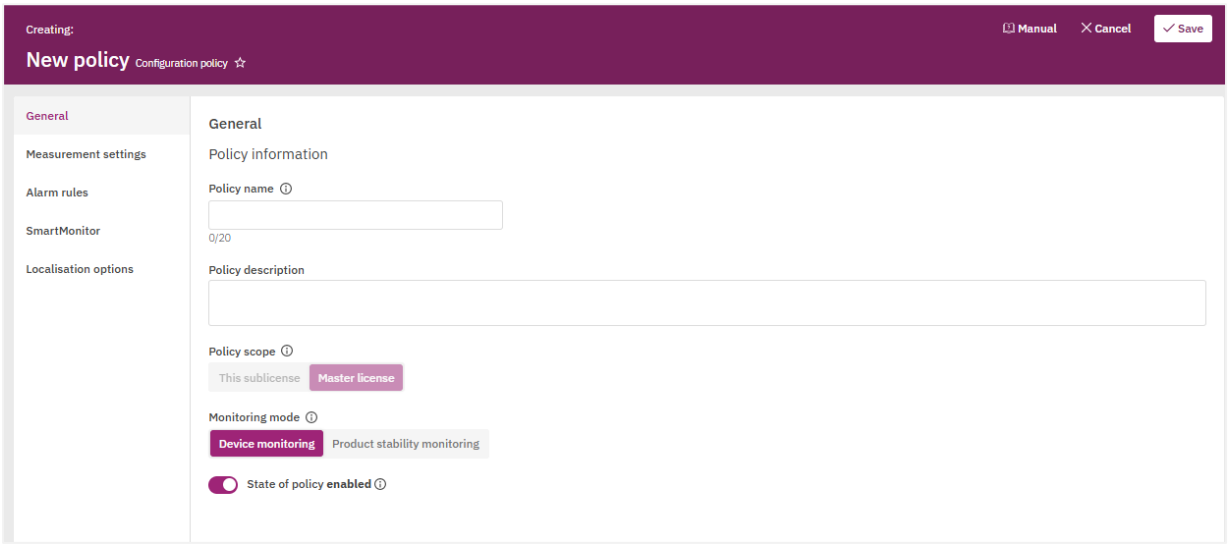
   A new window will pop up with three screens.

   The first screen defines the general information about your configuration policy.

   a) Enter policy name and description
   b) Select Monitoring mode:

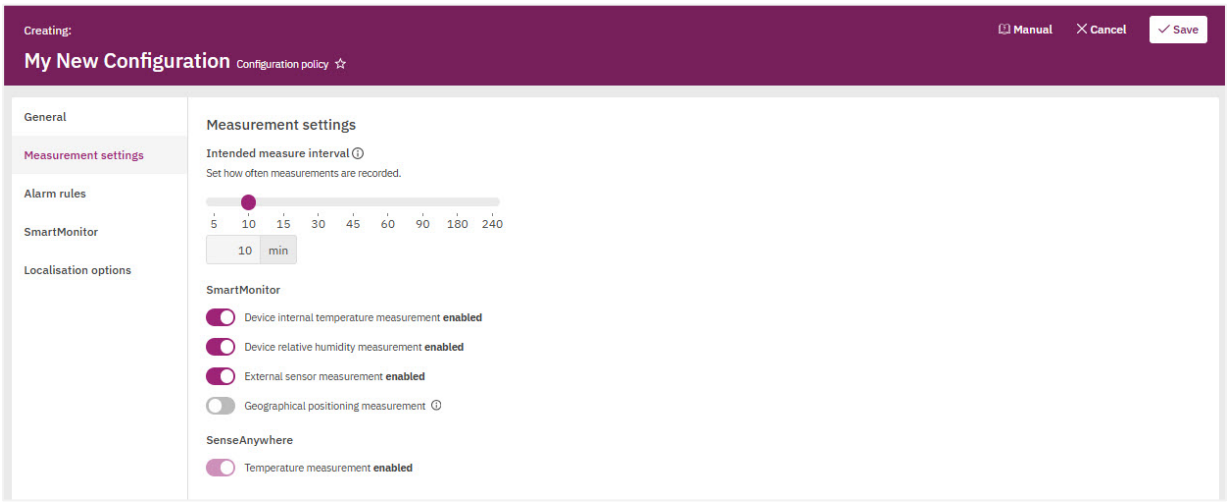
   - Device monitoring
   - Product stability monitoring

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99: Create Policy – General Section

2. Switch to the **Measurement settings** section. In the following screen, provide information:

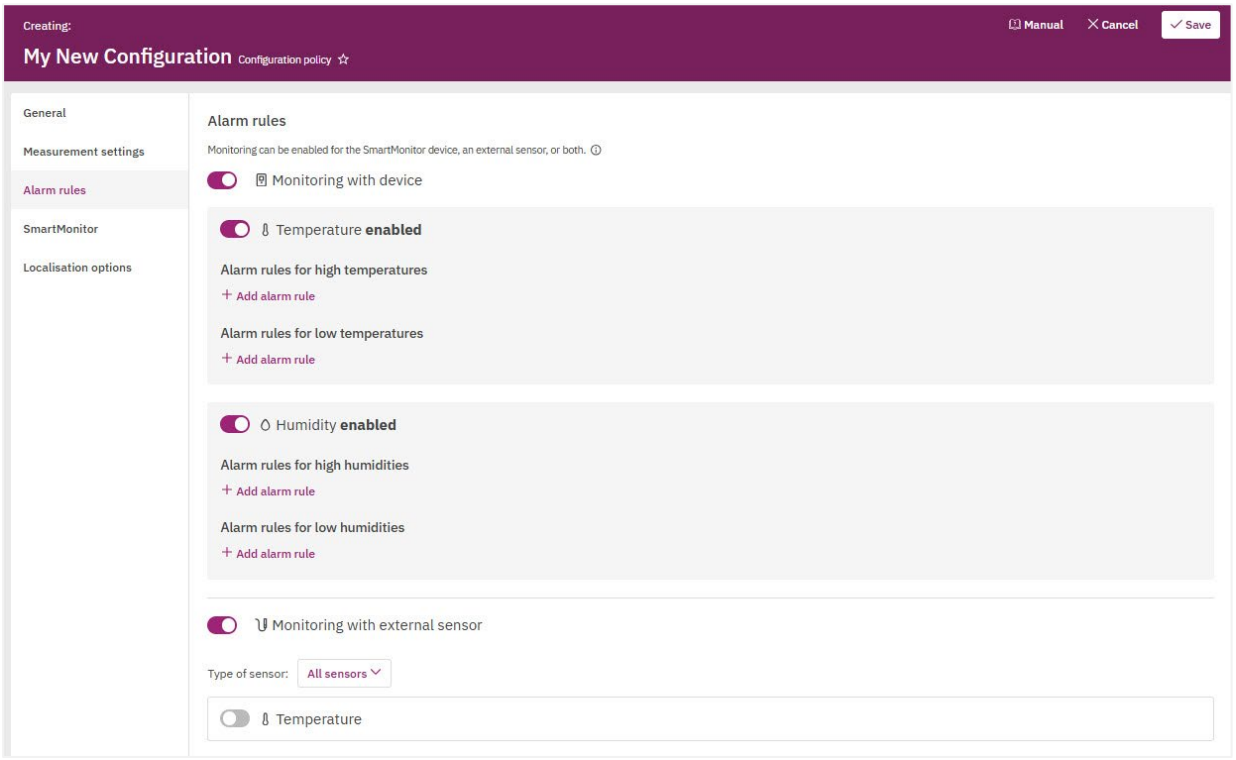


100: Create Policy – Measurement settings Section

a) Set the Intended measurement interval.
b) Enable / Disable SmartMonitor parameters.
c) Enable / Disable SenseAnywhere.

3. In the **Alam rules** section, set alarm rules for the device's internal sensors and external temperature probes.

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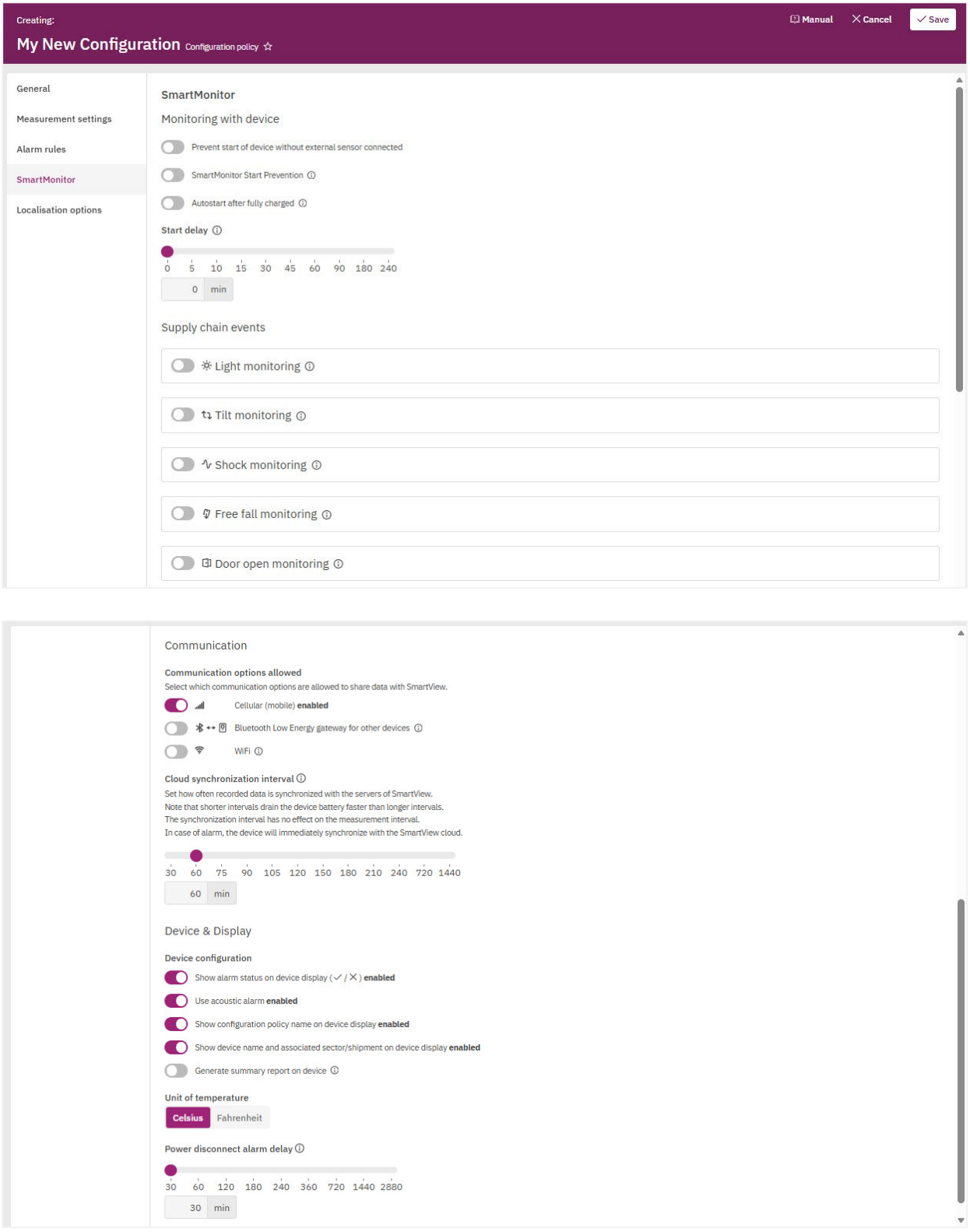


101: Create Policy – Alarm Rules Section

Each sensor supports various configurations, offering both single and accumulated alarm options—single alarms are activated by an individual event meeting the specified duration, while accumulated alarms sum multiple violations until the overall time threshold is reached. Although measurement intervals are subject to certain constraints, SmartView will provide notifications and recommend adjustments if an invalid selection is made.

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4. Switch to the **SmartMonitor** section:

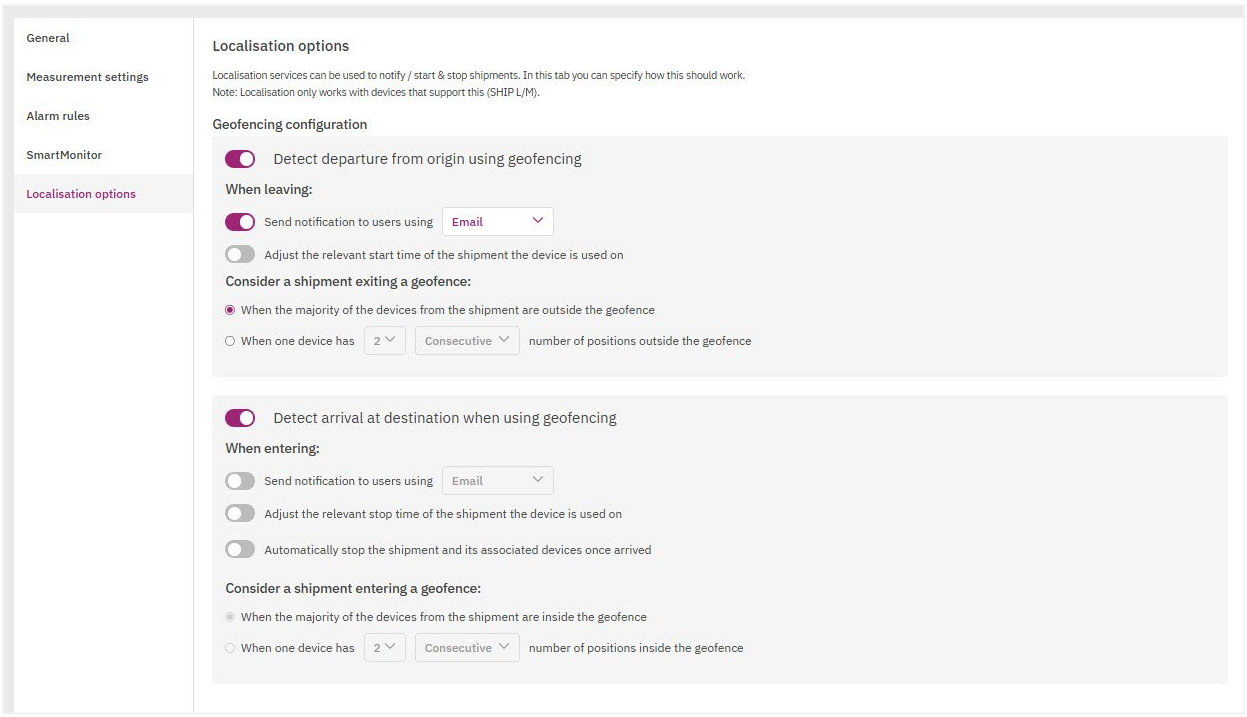


102: Create Policy – SmartMonitor Section

The configuration options will differ based on the monitor chosen.

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5. Switch to **Localization options** section.



103: Create Policy – Localization options Section

Localization options are enabled if Geographical positioning measurement is enabled in the Measurement settings for the Configuration policy.

6. Press **Save** to save configuration policy.

Light Monitoring Settings

For estimating light levels with the light sensor, you may use the following values:

Lux level estimate	Interpretation comparison
1	Twilight
5	Minimal street Lighting
10	Sunset
50	Living room
80	Hallway
100	Very dark overcast day
320-500	office lighting
400	sunrise/sunset
1000	Overcast day

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10000-25000	Full daylight
32000-130000	Direct sunlight

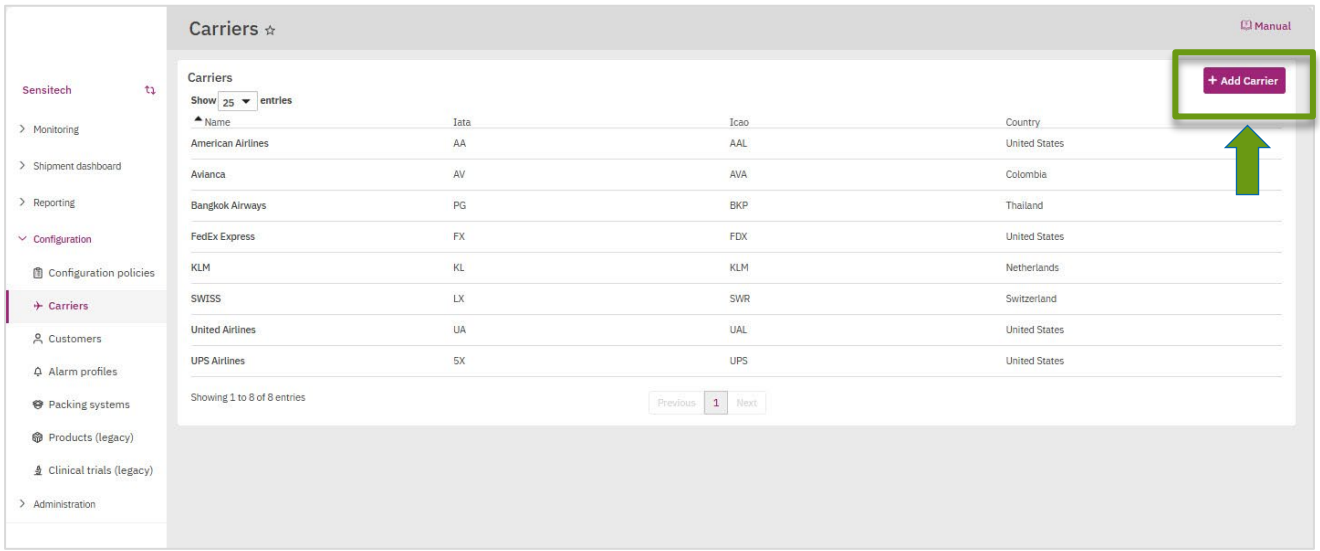
For the Door open Monitoring the Placement of the device itself is crucial.

Carriers

The Carriers menu lets you create a custom list of frequently used Air Carriers from about 250 code in the system for SmartView tasks. Add your preferred carriers to this subset before using them elsewhere, such as for shipments.

Air carrier code is used in external system that can automatically add a milestone to a shipment as the shipment progresses.

From the right-side navigation menu, click **Configuration> Carriers** in the menu to see the air carrier subset list, as shown in the image below.



104: Configuration > Carriers

To add a new carrier to the list simply click on the **Add Carrier** button.

To view a Carrier, select one from the list.

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105: Configuration – Carrier Details Page

To delete a carrier, open a Carrier in the view mode and then click **Delete** button from the screen.

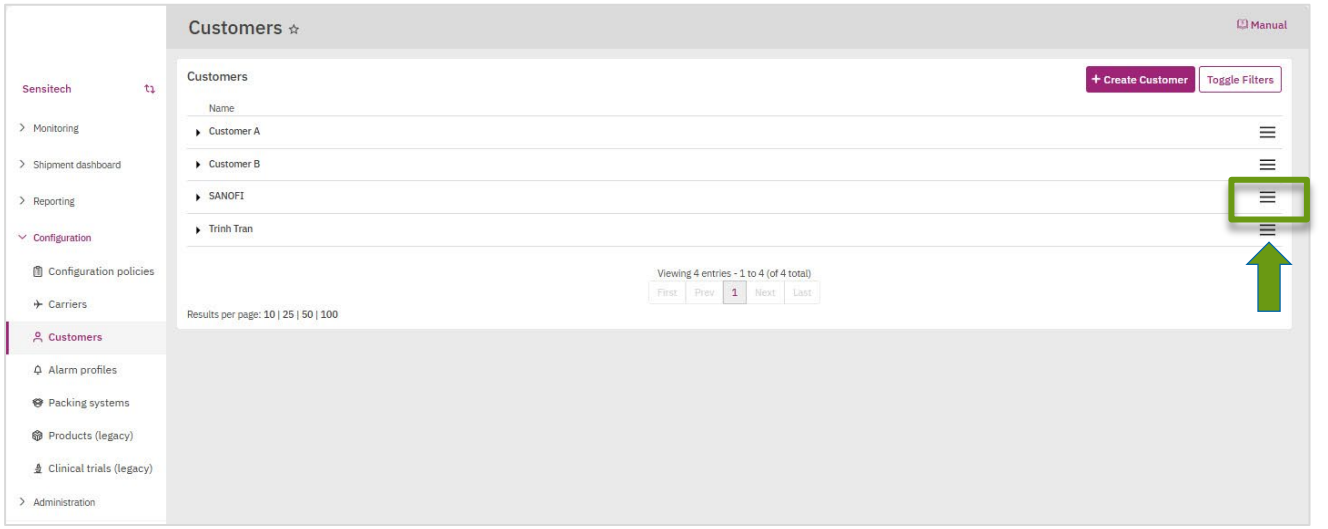
You cannot delete a carrier if it has already been associated to a shipment.

Customers

This section of the application manages customer information.

Customer List

From the right-side navigation menu, click **Configuration > Customers** to view a list of customers. The following screen displays:



106: Configuration > Customers

Customer Page

To view customer details, select and click a customer from the list. Customer Details page displays:

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107: Configuration – Customer Page

Create Customer

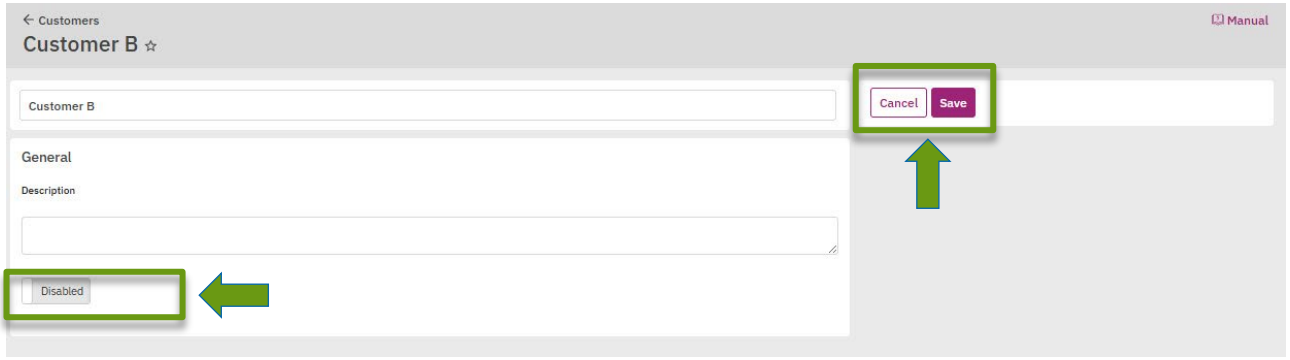
To add a new customer, click on the **Create Customer** button and fill in the name of your customer. After creating a customer, you will be able to assign this to one or more shipments.

Modify Customer

You can edit a customer by selecting a customer from the customer list and then selecting **Modify Customer** from the ☰ Action Menu.

You can also open customer in modify view by clicking in the modify button on the Customer page.

The system will open Customer page in the modify view:



108: Configuration – Customer Page – Modify View

Enable/Disable Customer

To enable/disable a customer, first, open customer details in the modify mode and then toggle Enable/Disable field.

Alarm Profiles

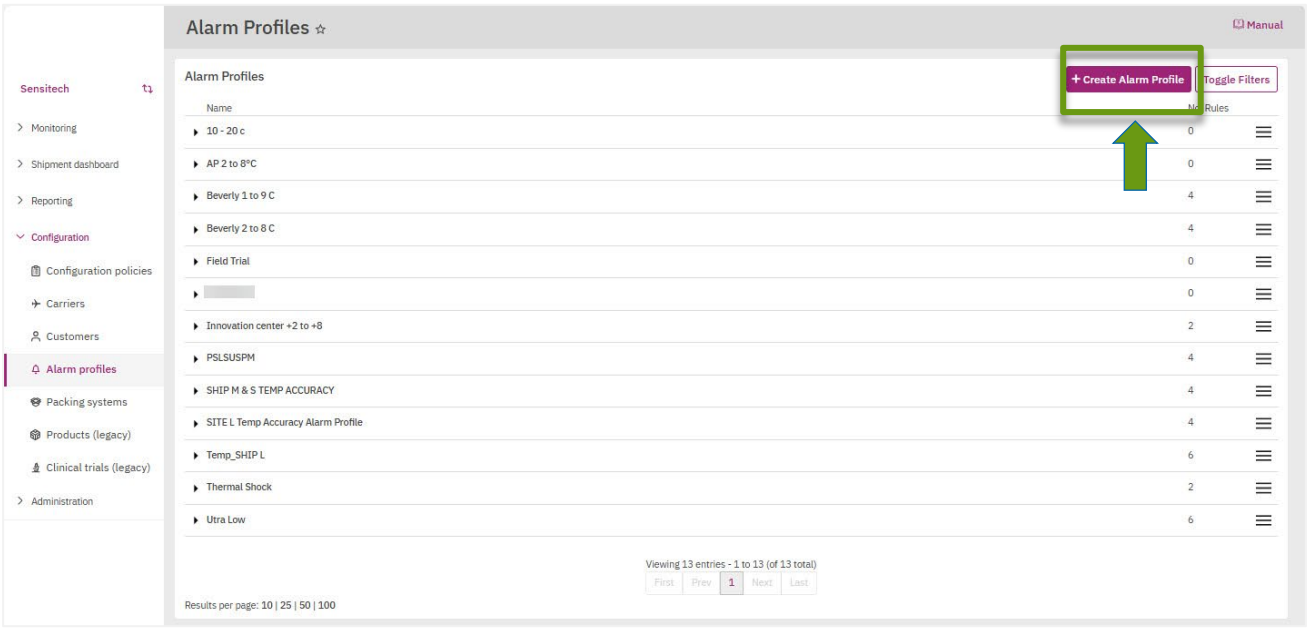
SmartView's alarm management enables users to set up alarms, detect breaches, take action, and generate reports. Alarms are triggered whenever continuous sensor data indicates that certain business rules have been violated.

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To begin, users define alarm profiles within the system. These profiles can then be assigned to any sector or shipment and reused as needed. The business rules specified in the selected profile are automatically applied and enforced for the associated shipment or location sector.

Alarm Profile List

From the right-side menu, select **Configuration > Alarm profiles**. A list of alarm profiles displays:



109: Configuration > Alarm profiles

While viewing alarm profile list, you can do the following actions:

- Expand an alarm profile to view details
- Select an alarm profile and then choose one of the following options from the ☰ Action Menu list:
  - View Alarm Profile
  - Modify Alarm Profile
- Select/Deselect **Toggle Filters** to filter the list of alarm profiles.

Alarm Profile Page

Select Alarm profile to view Alarm profile page.

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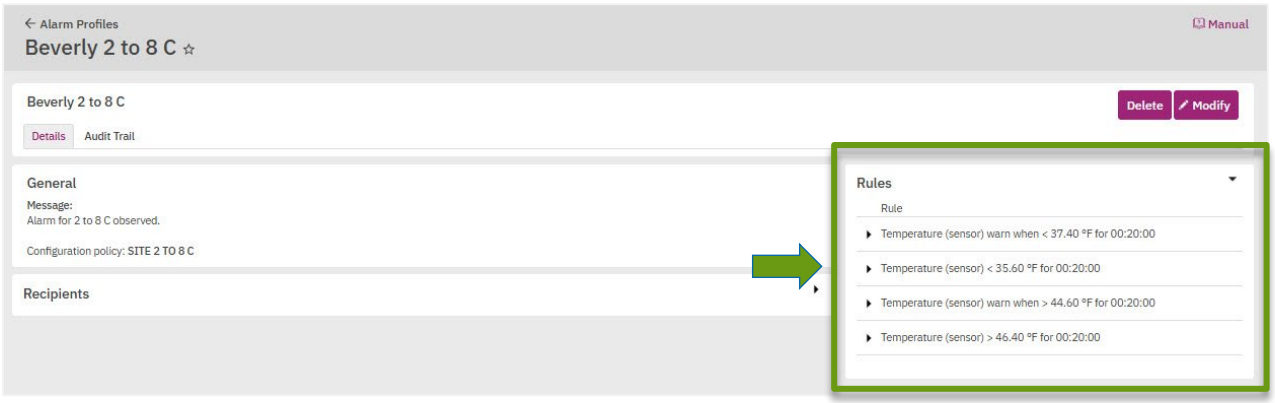
110: Configuration – Alarm Profile Page

There are 2 tabs in the Alarm Profile:

- Details
- Audit Trail

Details Tab

The details tab provides general information about the profile, rules, and configuration policy linked to the profile.



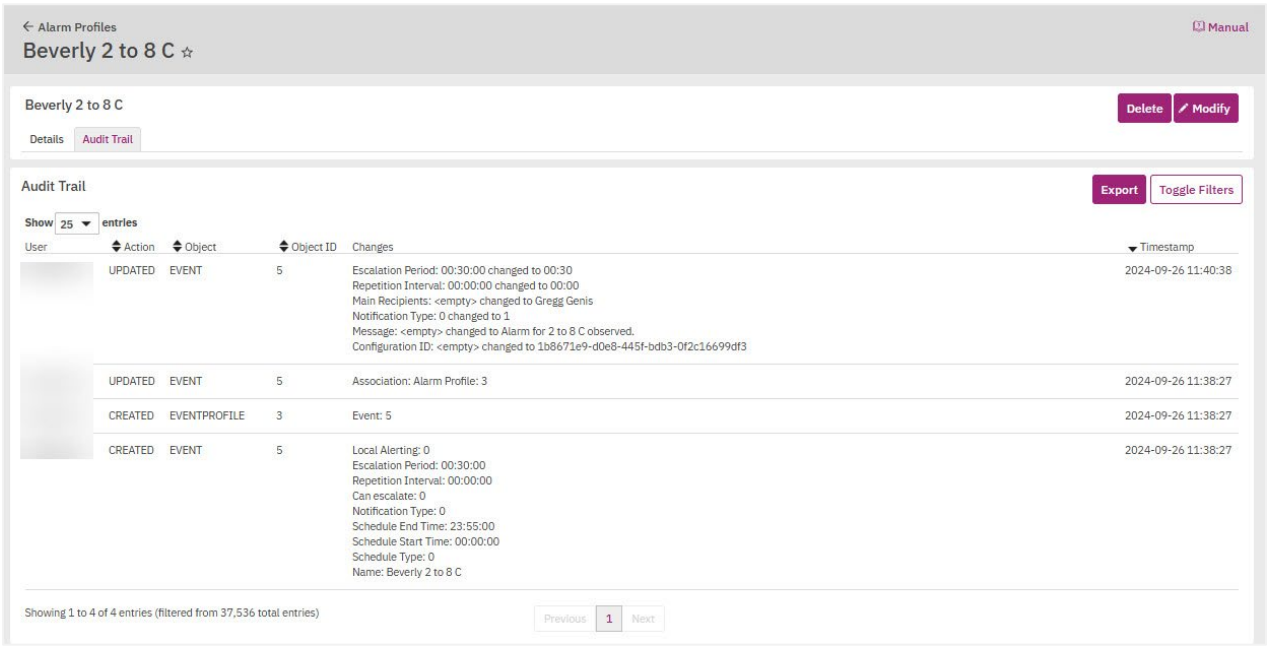
111: Configuration – Alarm Profile Page – Details Tab

In the **Rules** section, you can expand to view rules assigned to this profile.

Audit Trail Tab

The Audit Trail tab within the Alarm profile provides a record of events affecting the profile, including creation, updates, or associations with shipments or sectors.

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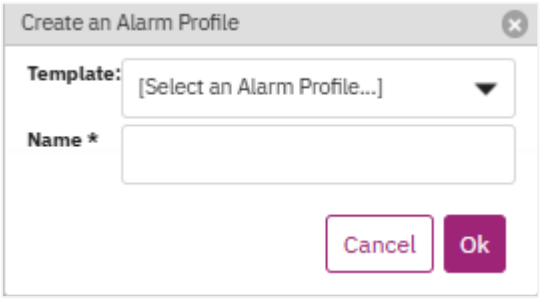


112: Configuration – Alarm Profile Page – Audit Trail Tab

Create Alarm Profile

To create a new alarm profile, complete the following steps:

1. From the Alarm profiles page, click **Create Alarm Profile**.



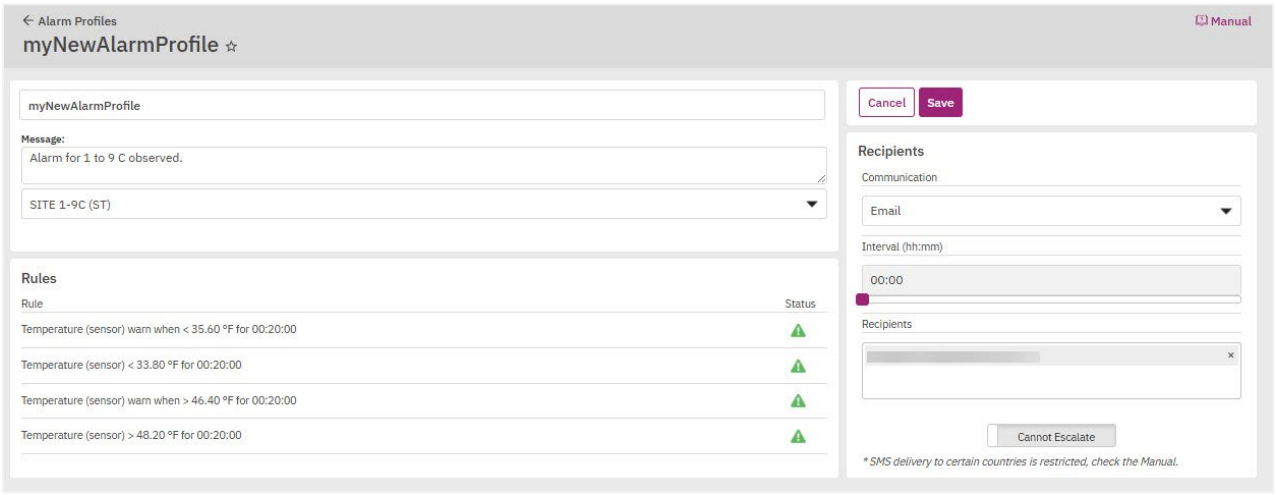
2. Provide a name for the alarm profile and select Template, if available.
3. Click **OK**.

When you use an existing alarm profile as a template, the new profile will automatically include all information from the original. This makes it easier to create similar alarm profiles when needed.

During the set-up, a configuration policy has to be selected. The rules for the event profile will be imported from the configuration policies available within the system.

4. On the next screen, provide information necessary for the alarm profile:

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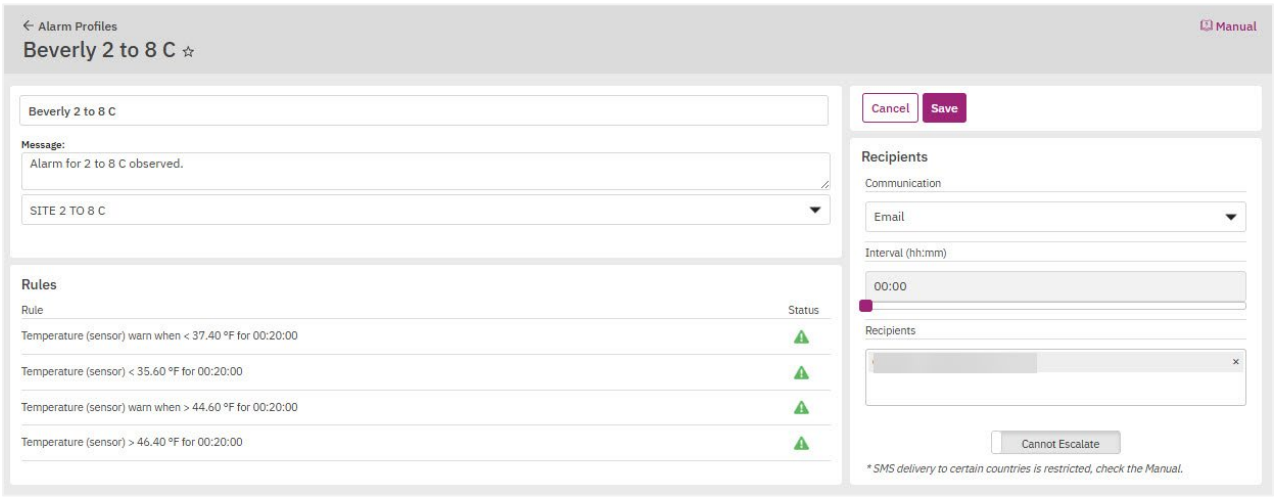
113: Configuration – Create Alarm Profile

Modify Alarm Profile

You can choose to modify an alarm profile from the alarm profile list by selecting a profile and then selecting **Modify Alarm Profile** from the ☰ Action Menu.

Alternatively, click on **Modify** from the Alarm profile page.

Alarm profile opens in the modify mode:



114: Configuration – Alarm Profile – Modify Mode

Editing or deleting an alarm profile does not impact shipments or sectors where the alarm has already been used; changes only affect future applications.

Delete Alarm Profile

To delete alarm profile, open the profile page and then click the **Delete** button. Refer to figure *103: Configuration – Alarm Profile Page* on page *156*.

An alarm profile cannot be deleted while it is currently in use.

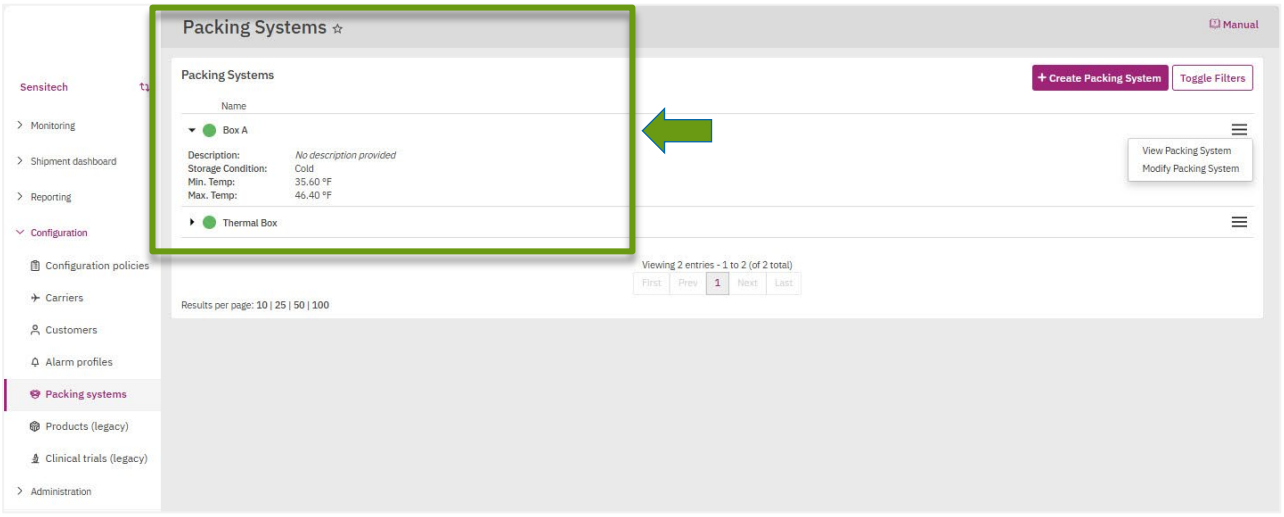
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Packing Systems

Packing Systems section of the Configuration menu enables users to define various packing systems, such as Envirotainer. In this context, a packing system denotes a specific type of packaging where a SmartSensor is installed to monitor the corresponding shipment.

Users may establish a list of commonly utilized packing systems for shipments tracked by SmartView. When associating a SmartSensor with a shipment, selecting the appropriate packing system is available as an optional step.

From the right-side menu, click **Configuration > Packing Systems**. A list of packing systems displays:



115: Configuration > Packing Systems

The colored icons indicate whether the packing system is: enabled or disabled.

Click to expand the packing system to see details. You can also select from the Action Menu to view or modify the system.

Packing System Page

From the packing systems list, select to view a packing system. Packing System page displays:

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116: Configuration > Packing System Page

Details Tab

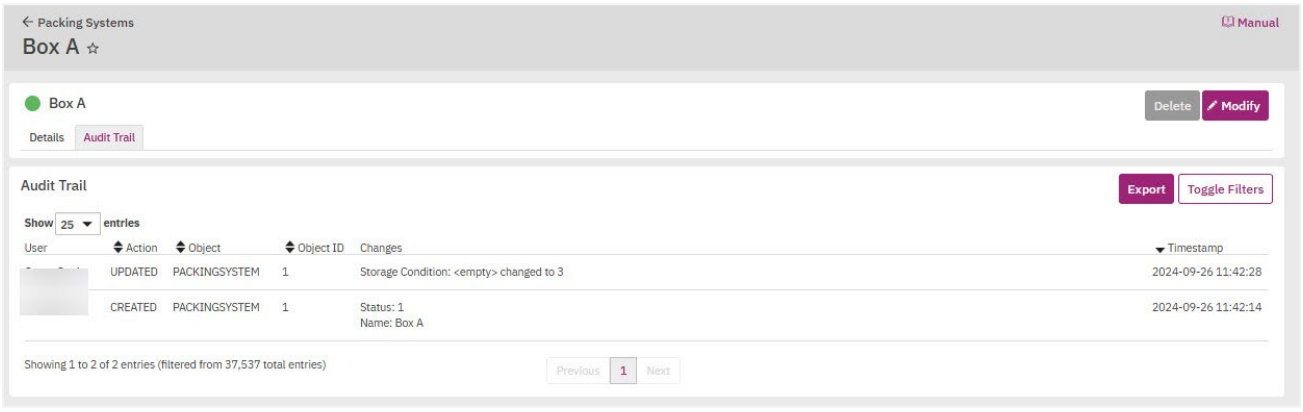
In the details tab, you can find general information about your packing system such as name and description. You can also find selected storage condition.

Storage Conditions Section

You can choose a storage condition for your packing system which you have predefined under '**Administration -> License Settings -> Storage Conditions**.

Audit Trail Tab

The Audit Trail tab within the Packing system provides a record of events affecting the system, including creation, updates, or associations with shipments or sectors.



117: Configuration > Packing System Page – Audit Trail Tab

Create Packing System

To create a new packing system, click on the **Create Packing System** button. Provide a non-existent and non-empty name for the new packing system and click on the OK button.

The packing system name can have a maximum length of 64 characters.

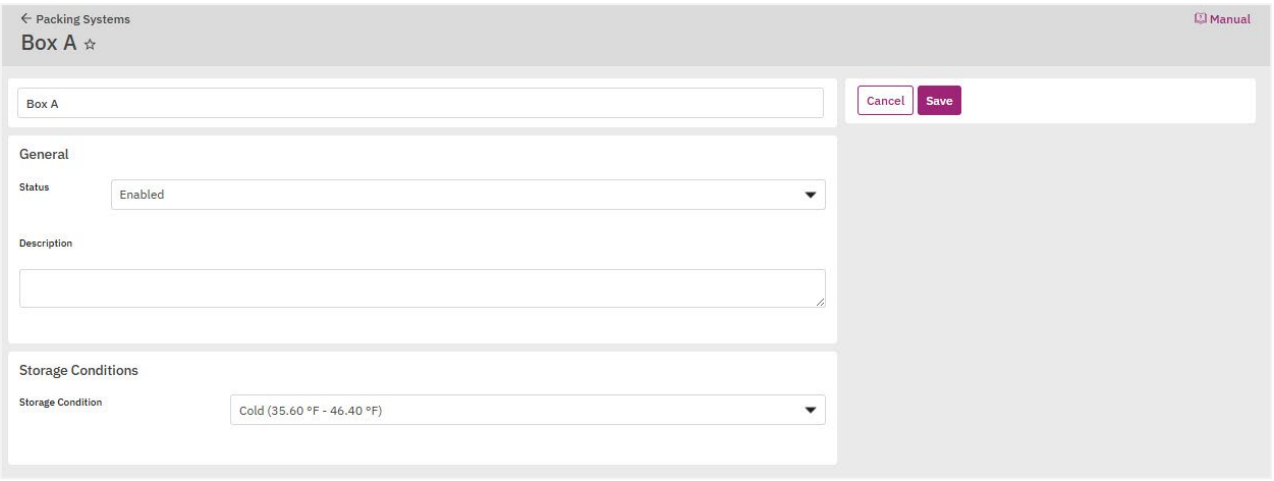
© Carrier. All Rights Reserved.

Modify Packing System

To edit an existing packing system simply click on the ☰ from the Action Menu for the packing system selected.

Alternatively, you can open the packing system in the view mode and click the **Modify** button.

The system will open the packing system in modify mode:



118: Configuration – Packing System – Modify Mode

Delete Packing System

To delete a packing system, open the packing system page in the view mode and then click the **Delete** button. Refer to figure *102: Configuration > Packing System Page* on page *160*.

You cannot delete an existing packing system if it has already been associated with the shipment.

Products (Legacy)

A Product is a physical item shipped with defined stability rules that include alarm thresholds to assess usability. The stability will be assessed according to the specified rules, using samples from connected devices obtained through shipment records or sector associations. Products may also require specific storage conditions, a global temperature range—to be maintained during transfer or storage.

Product List

To view a product list, from the left navigation, select **Configuration > Products** (Legacy). Product list displays:

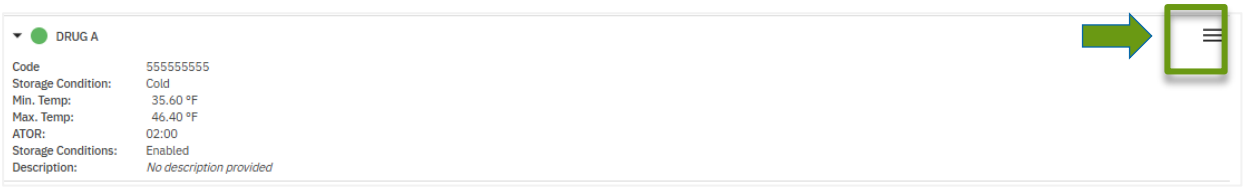
© Carrier. All Rights Reserved.



119: Configuration > Product List

While viewing the product list, user can do the following:

- Select to expand a product to view some of the product details without opening the product page:

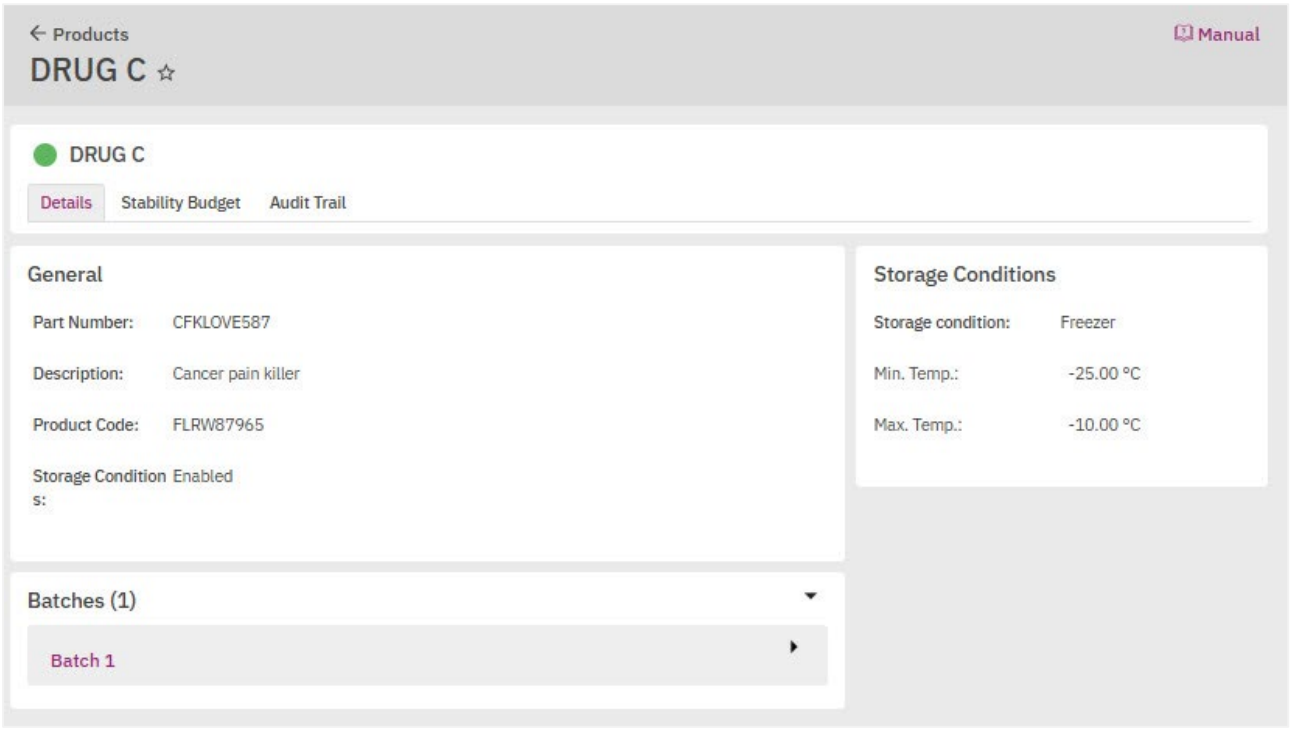


- Select a product and then choose one of the following actions from the ☰ Action Menu:
  - View Product
- Click on the product name to view the Product page.
- Select/Deselect **Toggle Filters** field to filter the list of products based on various parameters.

Product Page

Product Page looks similar to the following:

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120: Configuration – Product Page

Details Tab

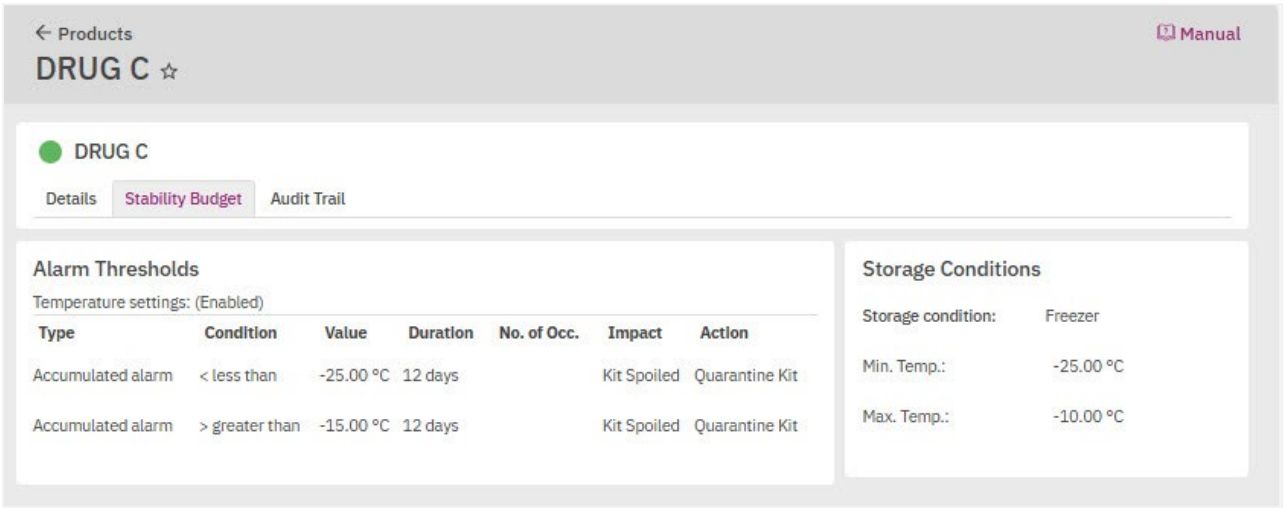
The Details tab of the product page contains the following sections:

- General – information about the product.
- Batches – product batches that include this product.
- Storage conditions – optimal storage conditions for the product.

Stability Budget Tab

The Stability Budget tab provides an overview of the time and conditions under which a product remains stable and safe for use. It helps track the product's shelf life and storage requirements to ensure quality is maintained throughout its lifecycle.

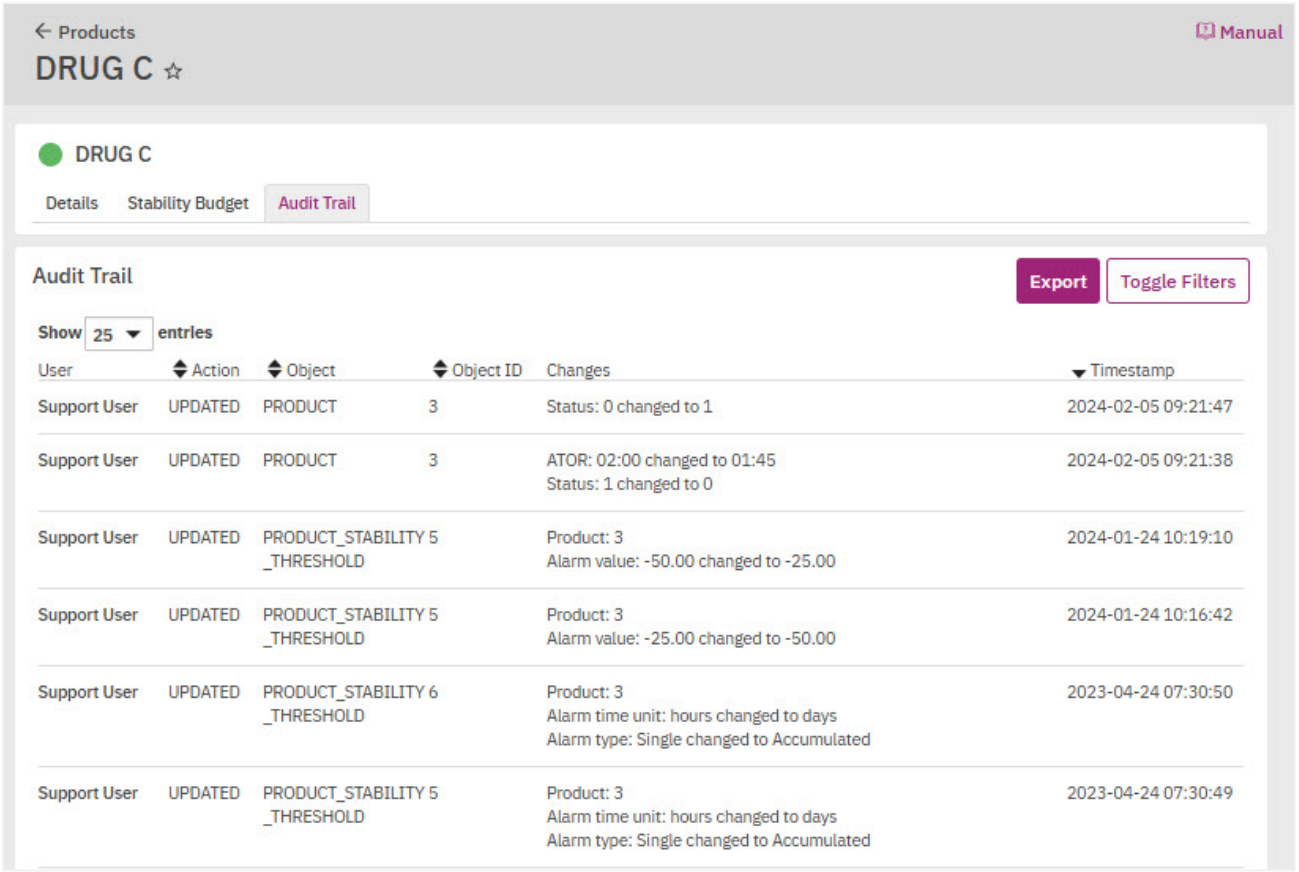
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121: Configuration > Product Page – Stability Budge Tab

Audit Trail Tab

The Audit Trail tab within the Product provides a record of events affecting the system, including creation, updates, or associations with shipments.



122: Configuration > Product Page – Audit Trail Tab

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Create Product

To create a new product, create a new Monitoring Type. This will automatically add a new product to the Product list. Refer to the *Monitoring Types* section in Administration.

Modify Product

If you want to modify your product settings, click the product name to get inside the product settings.

Click **Modify** to change settings and save afterward.

Delete Product

To delete a product system, open a product page in the view mode and then click the **Delete** button. Refer to figure *105: Configuration – Product Page* on page *162*.

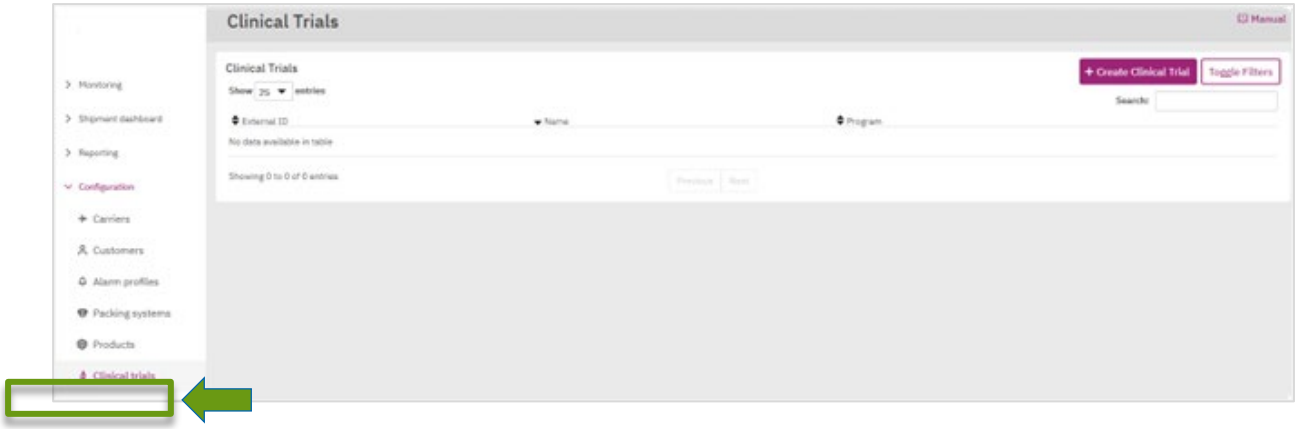
You cannot delete an existing product if it has already been associated with the shipment.

The **Delete** button is greyed out as long as the product is in use.

Clinical Trials (Legacy)

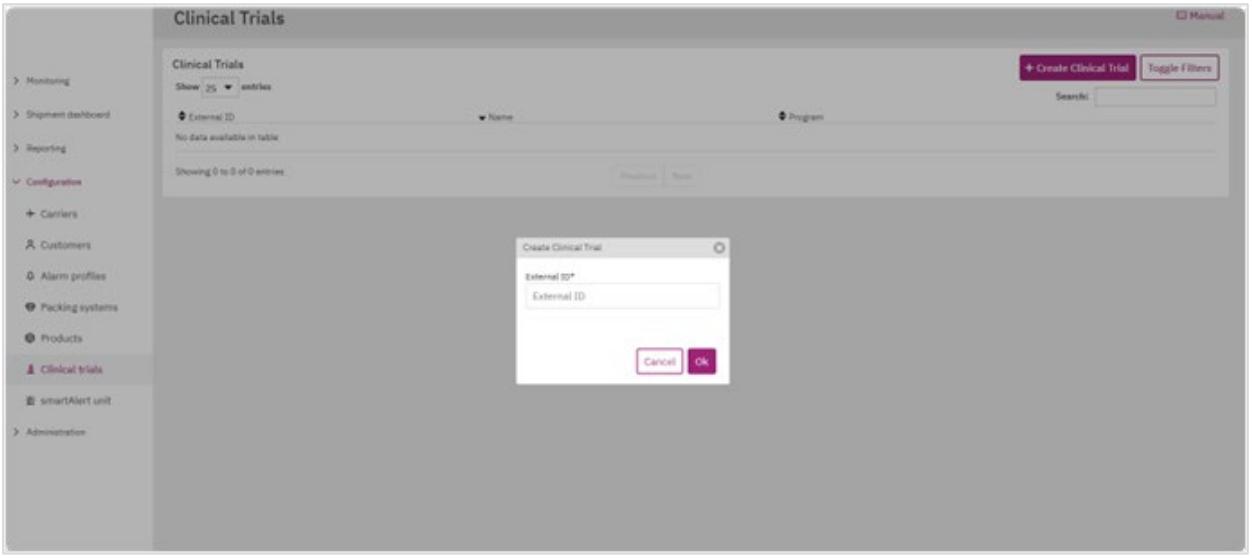
To create a Clinical Trial, complete the following steps:

1. Click **Create Clinical Trial** within the Clinical Trial view.



2. Choose a name for your Clinical Trial and then press **OK**.

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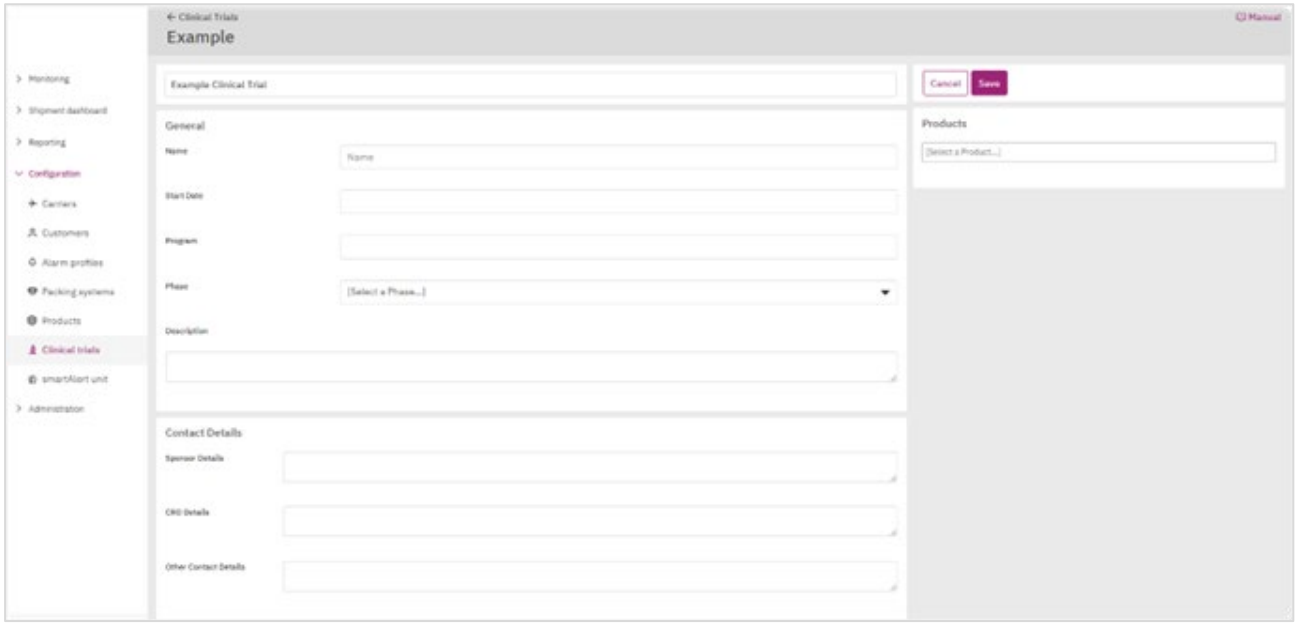
3. Add the following information within the General area.

Topic	Description
Name	Name of the Clinical Trial (internal Product name for example)
Start Date	Start of the Clinical Trial
Program	Additional deeper information about the Clinical Trial
Phase	Enter the phase of the Clinical Trial
Description	Description for more information about the Clinical Trial

4. And add the following information within the contact details to set up your clinical trial

Topic	Description
Sponsor Details	Enter the name of the sponsor (for internal use only)
CRO Details	Enter the name of the CRO (for internal use only)
Other Contact Details	Enter other contact involved (for internal use only)

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5. Now add your products to the Clinical Trial.

   You must first create the products before you can assign them to the Clinical Trial.

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Administration

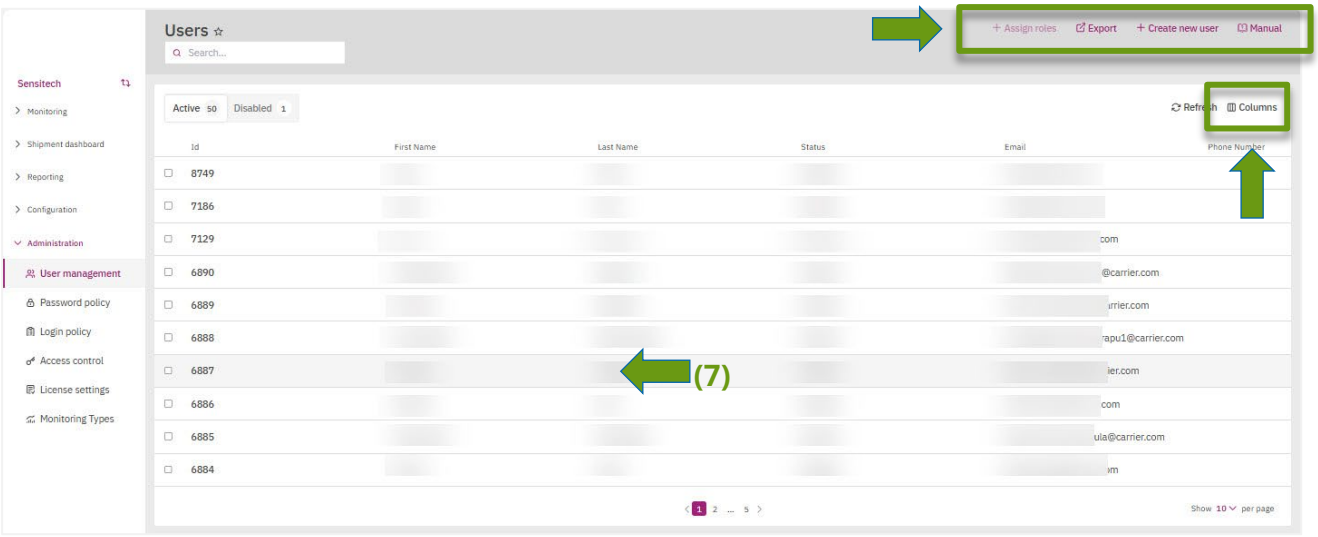
The 'Administration' button in the main menu enables you to manage your own and other users' account settings, as well as some general adjustments to your license. Administration privileges are required to configure Administration portions of SmartView.

User Management

Administrator can manage users in SmartView and add them to a specific license. Once users are created, they can be assigned to roles with specific permissions.

User List

To view users for a license, select **Administration > User Management** from the left navigation:



123: Administration > User Management

An administrator can view the details of any type of user by clicking either on the username or on the ☰ Actions Manu in the overview list. An administrator can do the following actions accessing user information:

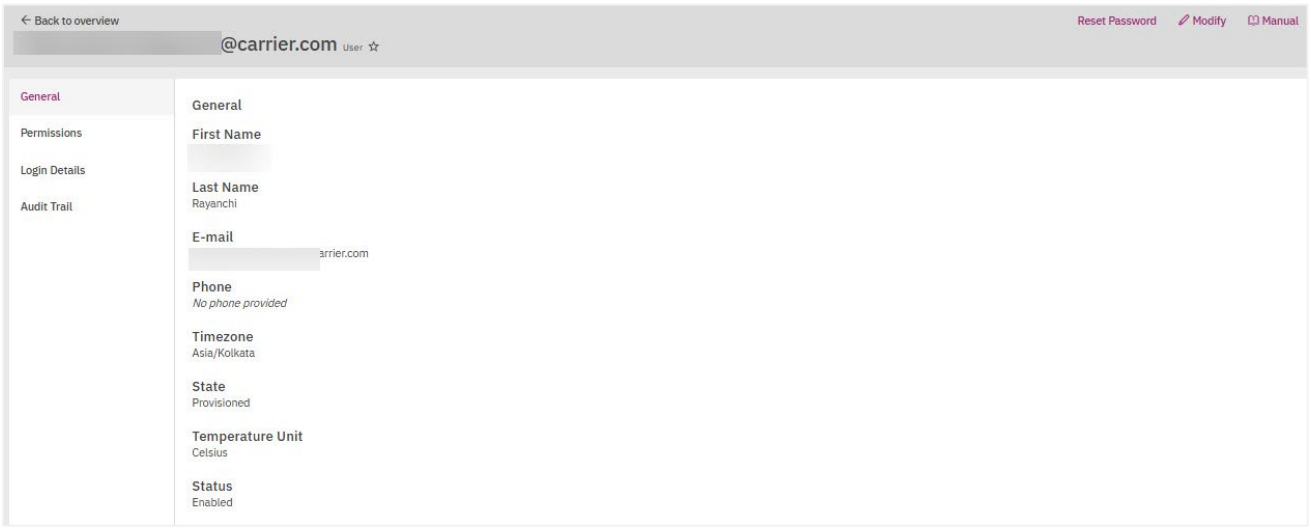
While viewing the list of users, you can do the following actions:

- Assign Users to roles.
- Export users – select user from the list and then click the Export button. The system will export users in Excel (.cvs) fromat.
- Create New User – refer to the *Create New User* section to learn more.
- Enable / disable columns in the list – click on Columns.

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User Page

From the User List (Administration > User Management), select a user you want to view. The User page displays information about the user:



124: Administration > User Management – User Page

User page displays the following information organized in tabs:

- General
- Permissions
- Login Details
- Audit Trail

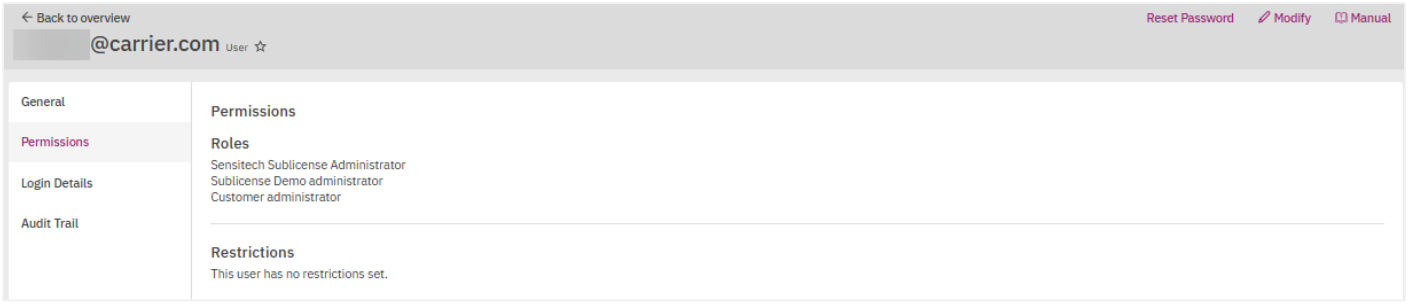
General Tab

In this tab, you can see user's name, email address, phone, time zone and other preferences.

These preferences can be modified.

Permissions Tab

In this tab, you can view user's roles and restrictions.



125: User Page - Permissions Tab

When modifying a user, you can change roles and restrictions.

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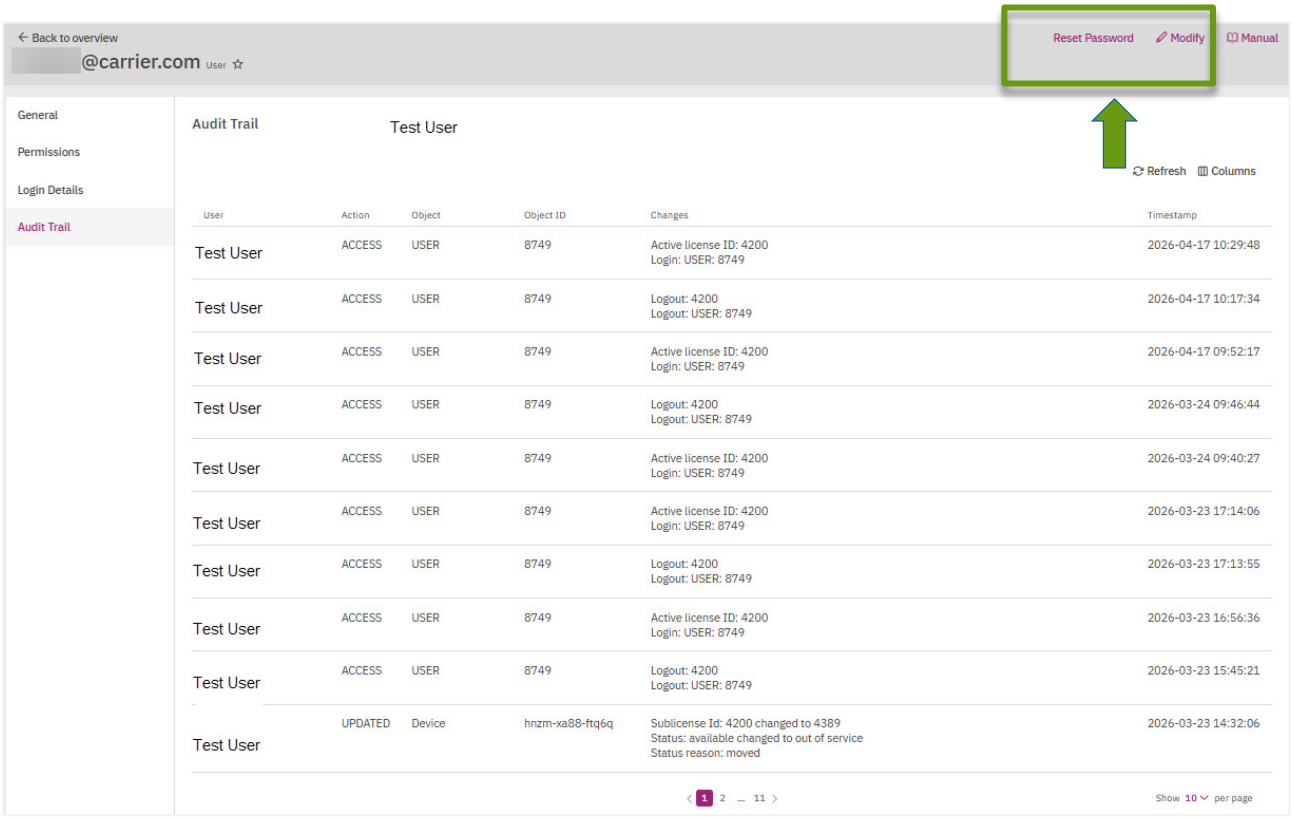
Login Details Tab

In this tab, you can see user's login details such as:

- First login
- Last Login
- Login Count
- Locked – whether the user is locked
- Failed Login Attempts

Audit Trail Tab

On this page, you can see all the actions that the user have made in the System.



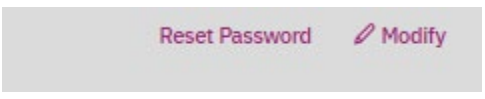
126: User Page - Audit Trail Tab

Actions

While viewing the user page, you can do the following actions.

- Modify user account settings.

  To modify a user account, click **Modify** in the top right corner.

- Reset any user's password.

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To reset a password, in the top right corner of the User page, click **Reset Password.**

An email with a reset link is sent to the user.

- Disable a user by setting their status to **Disabled** when access is no longer permitted.

Users cannot be deleted.

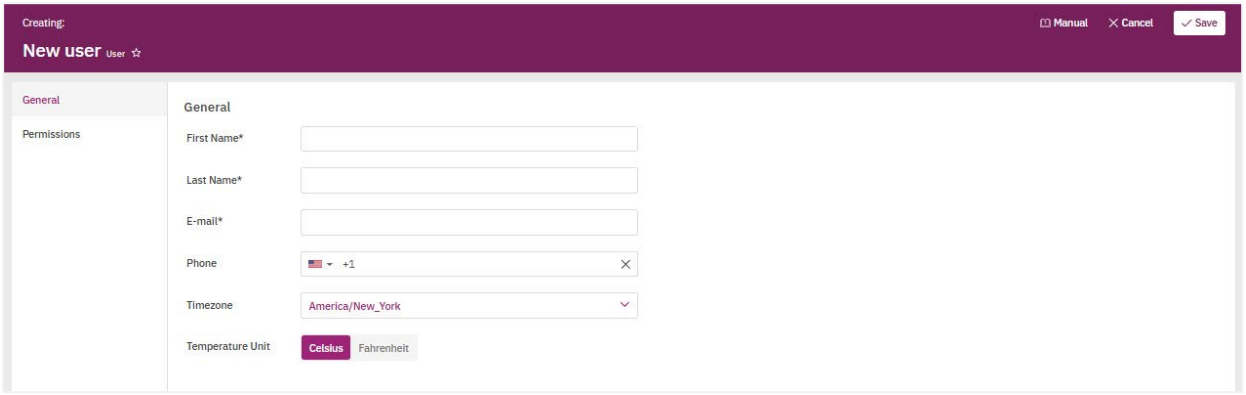
- Limit user access within a license based on location, carrier, or customer linked to the user's sub-licenses.

Create New User

When you create a new user, you need to assign this user to a specific role (sublicense). Refer to the *Access Control* section to learn how to view the existing sublicenses or how to create new ones.

To create new user, follow the steps below:

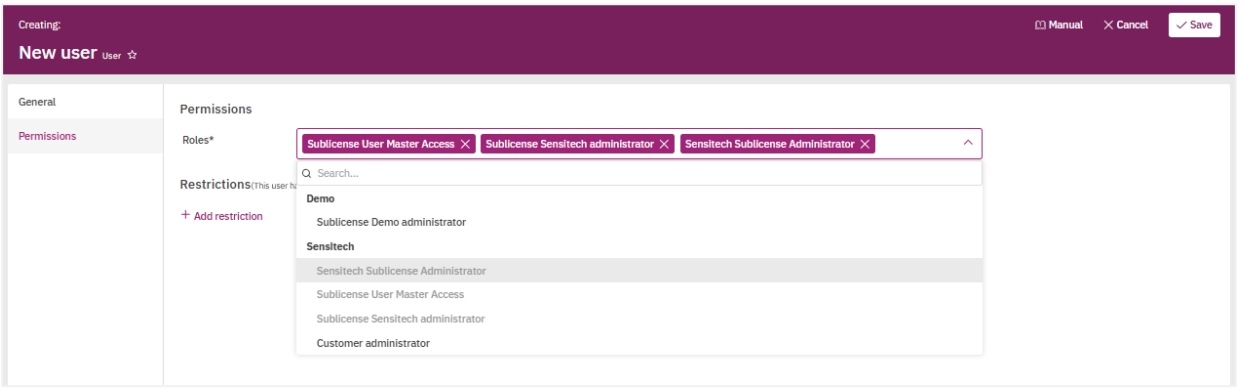
1. In the **Administration > User Management** screen, click the **Create new user** button. The **New user** screen displays:



127: Administration > User Management – Create User (General Tab)

2. In the **General** tab, complete the form. Required fields are:
    - First name
    - Last Name
    - e-Mail
3. Switch to the **Permissions** tab. In this tab, assign users to the available roles:

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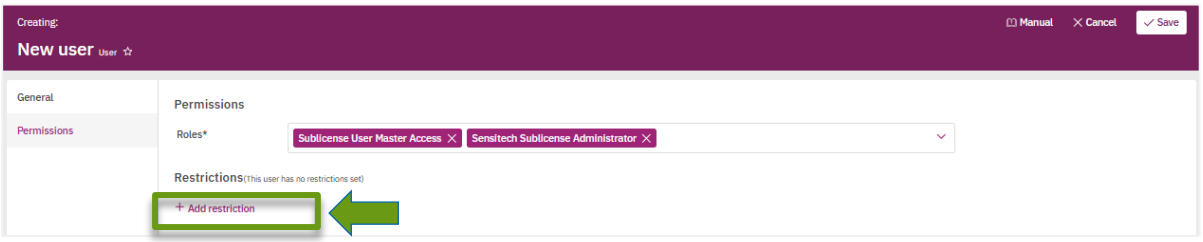


128: Administration > User Management – Create User (Permissions Tab)

Permissions are divided into 2 areas: Roles and Restrictions.

a) In the **Roles** section of the tab, select at least one role.

Once you select at least one role, the **Add Restrictions** options becomes available.



b) (Optional) In the **Restrictions** section, select **Add Restriction** to add a restriction for your user.

Additional restriction can be applied to a user based on Location, Carrier, or Customer available for selected Sublicense.

Users are permitted to enable only one restriction per sublicense to which they have access.

c) Press **Save** to save your changes.

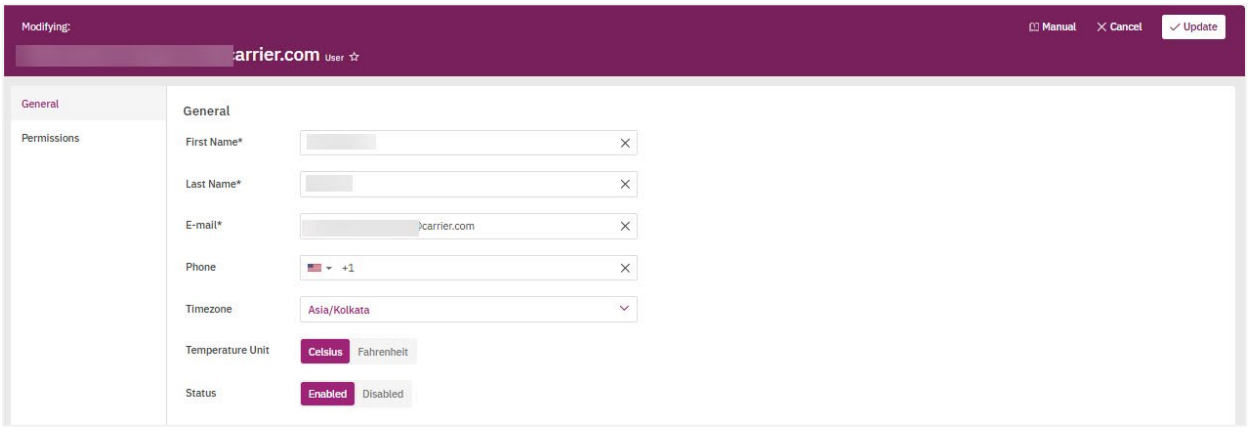
The new user will receive a notification via email.

Modify User

To make modifications to a user, select the user and open the page in modify mode.

1. From the User Page, click on Modify to open the page in the modify mode. The page similar to the following displays:

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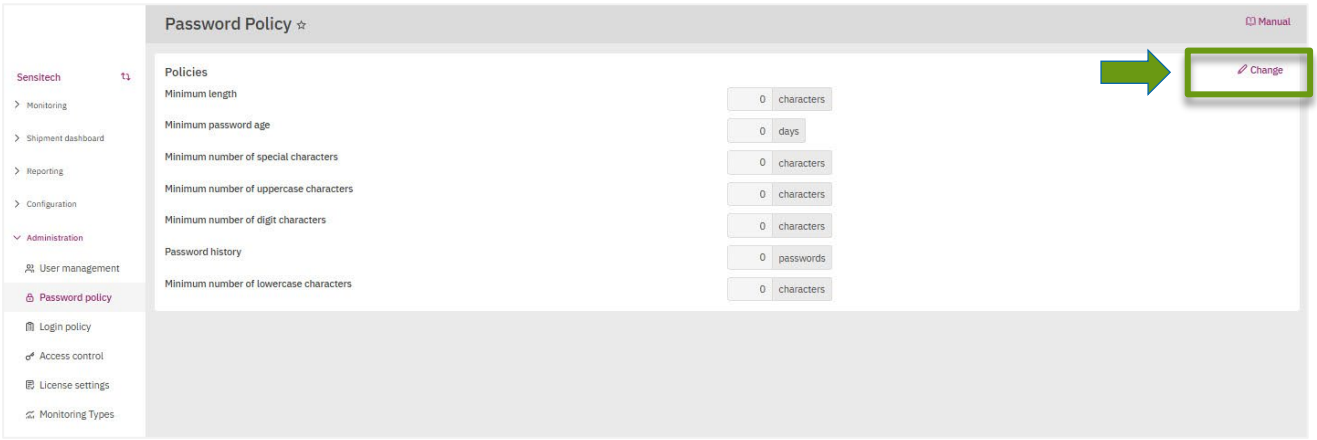
129: Administration > User Management – Modify User (Permissions Tab)

2. Modify user general information (name, email, phone) and permissions.
3. Click **Update** to save your changs.

Password Policy

SmartView allows customized password policies to ensure that the security level meets all user requirements. In the pictures below are listed all the available options.

Click on **Aministration > Password Policy** to view password policy configured for your license:



130: Administration > Password Policy

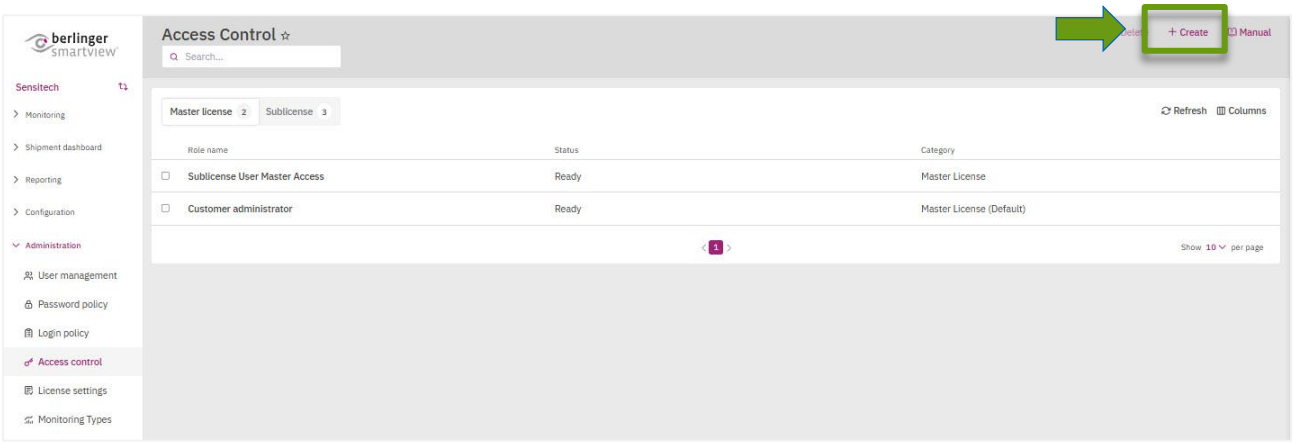
Click **Change** to change requirements in Password Policy.

Access Control

SmartView works with role-based access control. Within this area, a user with the required rights can set up different user profiles with the corresponding rights to limit access to the system to only specific required areas.

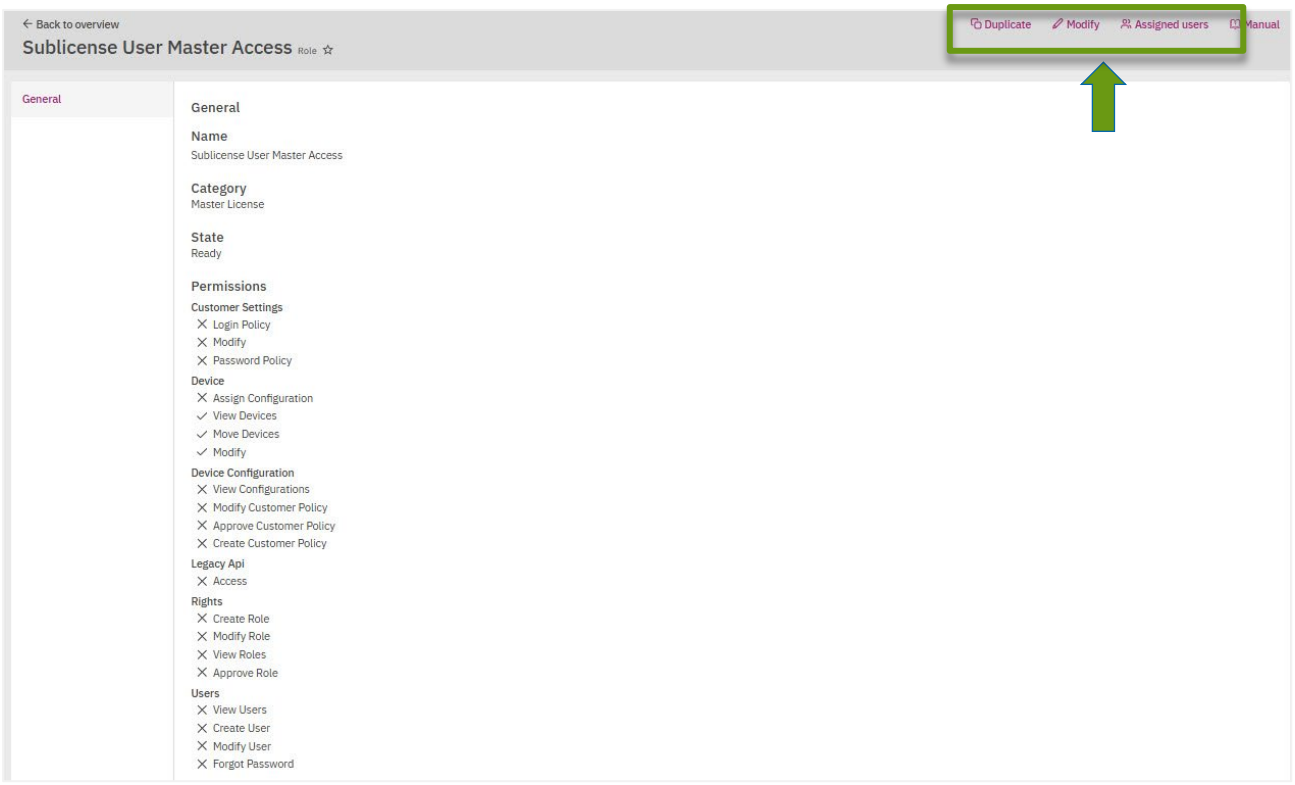
On the right-side menu, select **Administrator > Access control**:

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131: Administration > Access Control

Click on a role to view the role details. The Role page opens with the list of permissions enabled:



132: Administration > Access Control – License Page

Administrator can select appropriate permissions for each user and enable permission options. For example, a user who manages stationary monitoring for a company can be configured to have access to Locations and Devices and no access to Shipments. Another user who creates shipments may have access to Shipments and devices but no access to Locations.

The following permissions are available for a Role:

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Table 3: Permissions

Permission Name and Description	Permission Options
Audit Trail	• view
Carriers	• view • create update • remove
Clinical Trail	• create update • view
Custom Graphs	• delete • create update • view
Customers	• view • delete • create update
Device	• reverse logistics outgoing scan • assign configuration • view devices • data file upload • move devices • reverse logistics incoming scan • modify
Device Configuration	• view configurations • modify customer policy • approve customer policy • create customer policy
Event Alarm Profiles	• view • delete • create update
Excursions Alarms	• update • view
Legacy Api	• access

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Locations	• view • create update
Manual Alarms	• create • approve • modify • view
Monitoring Type Batches	• modify • view • create
Monitoring Types	• view • modify • create
Packing Systems	• view • delete • create update
Product Group Items	• modify • quality release • view • create
Products	• view • create update • delete
Rights	• create role • modify role • view roles • approve role
Sectors	• view • create update • delete
Shipment Analysis	• view • delete • create update
Shipment Attachments	• delete • create update • view
Shipment Dashboard	• view

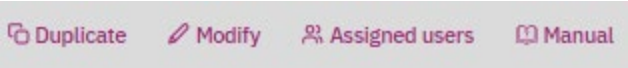
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Shipments	• delete • view • create update
Sublicense Settings	• modify
Users	• view users • create user • modify user • forgot password

While viewing the license page, you can do the following:

- Duplicate license
- Modify
- View Assigned Users

Select the appropriate option from the menu:



Duplicate Role

This option allows you to duplicate already existing role with permissions and restrictions. This option is useful when creating new roles that are similar to the ones that already exist with the exceptions of a few settings.

To duplicate a role, open the role page. From the top-right menu, click **Duplicate**.

Modify Role

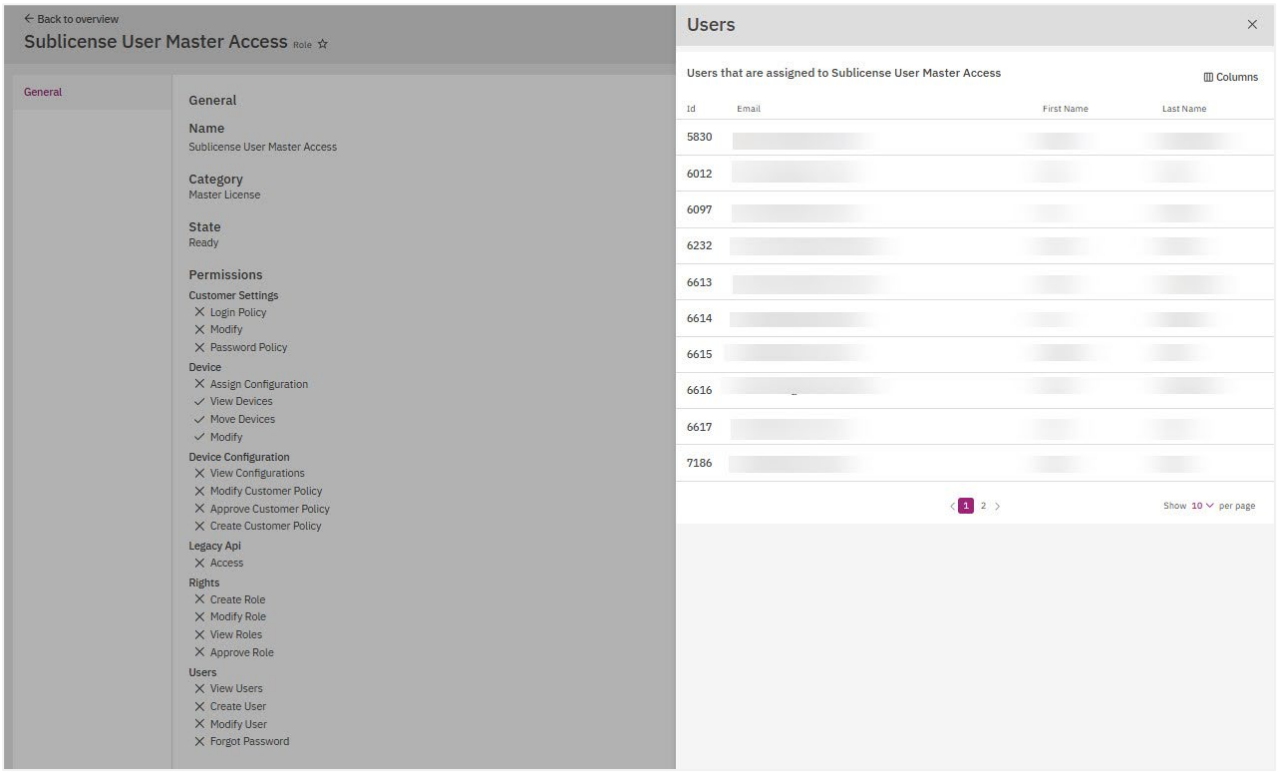
To modify a role, from the role page, click **Modify**.

View Assigned Users

To view users assigned to the role, open the role page. From the top-right menu, click the **Assigned users** button.

This will open a new view that displays a list of all users that have this role assigned.

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133: Administration > Access Control – License Page – Assigned Users

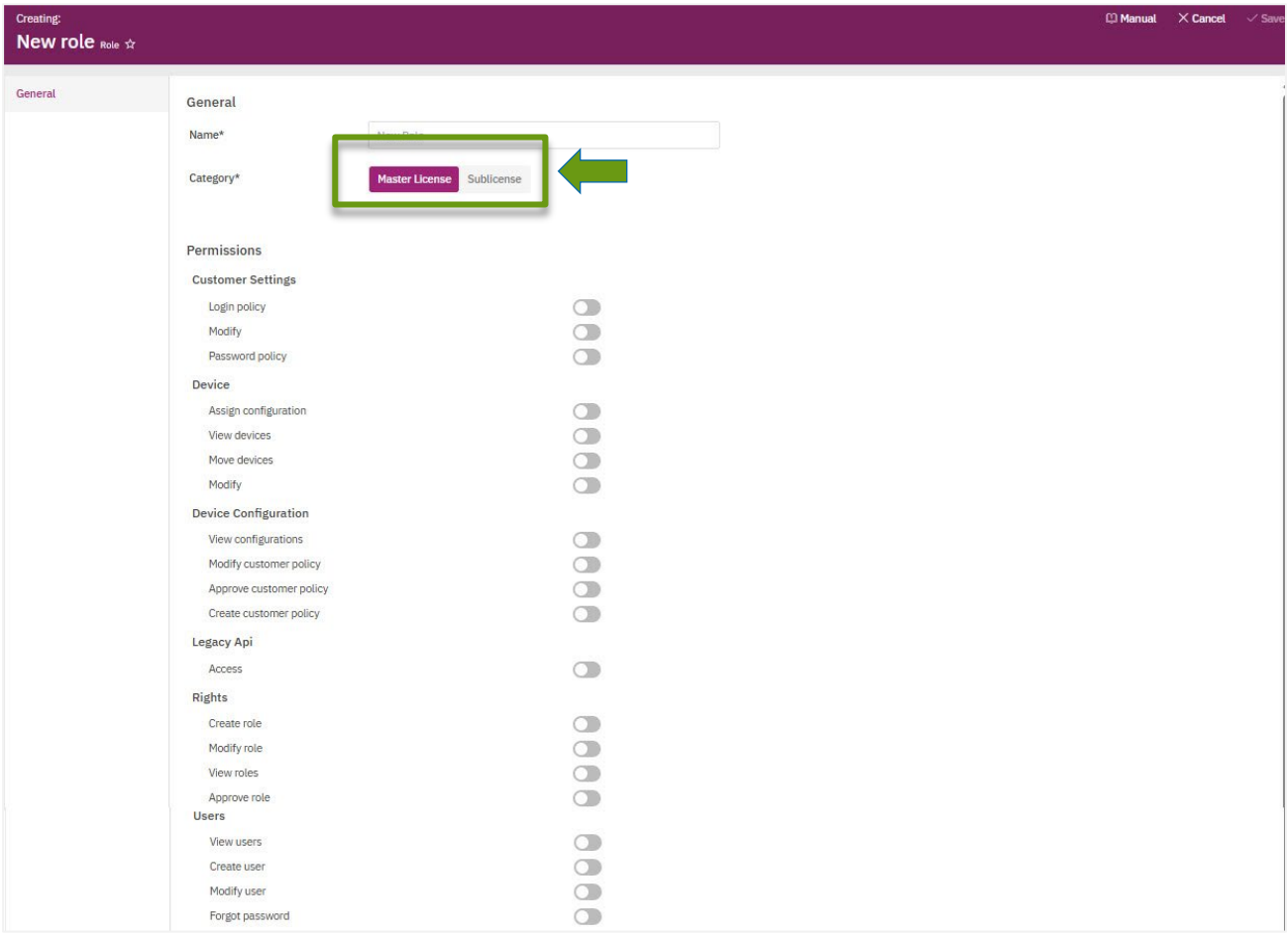
In this view, you will be able to see users that are assigned to this license.

Create New License

If it's then wished to create a new policy, you can do so by pressing the **Create** button.

The New role screen displays where you can create a new role:

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134: Administration > Access Control – Create New Role

By default, the Master License category is selected. Provide the following information for your Master License:

1. In the Name field, type the name for your new role.
2. Select the Category for your role. This category will enable the role for a master license or a sublicense:

   - Master License
   - Sublicense

   The window expands to let you customize permissions for different areas. You can also assign an admin profile with full access. Permission levels range from none, view, create, update, to delete; selecting a higher level automatically includes all lower levels.

   Refer to Table 1: Permissions on page 175.

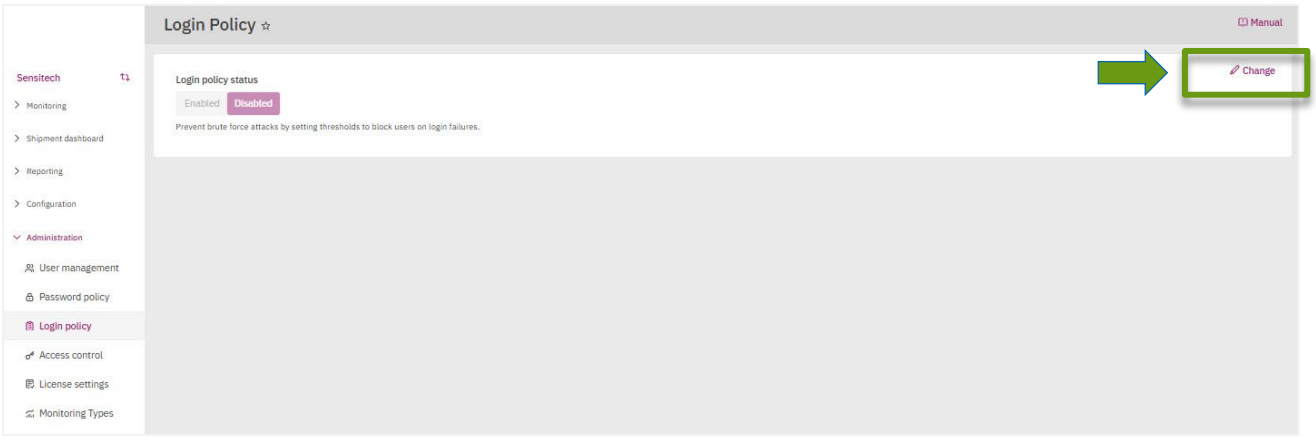
3. Enable/ disable permissions.
4. Click **Save** to save the changes.
5. If there is a requirement for the license to go through the approval process, click **Submit for approval**. Refer to the *License Settings* section in the Administration.

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Login Policy

Within this area it is possible to set different login attempt limitations to prevent brute force attacks into the system. This may include waiting times after too many wrong attempts or waiting times between attempts itself.

Click on **Aministration > Login Policy** to view login policy configured for your license:

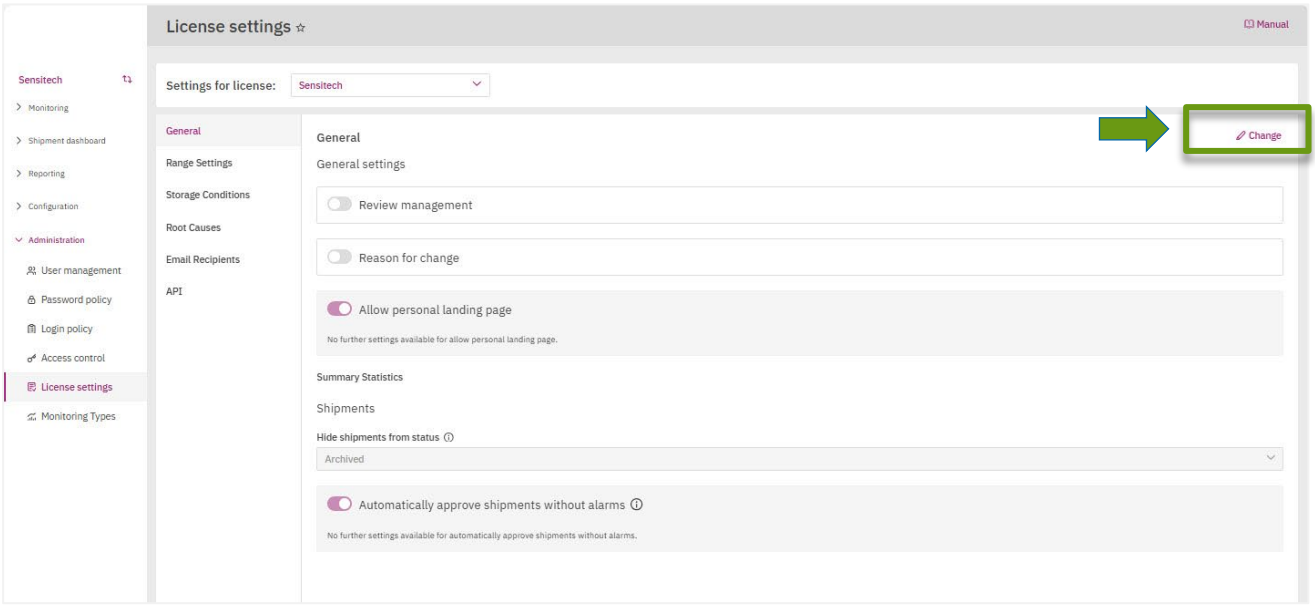


135: Administration > Login Policy

Click **Change** to change login policy. You can toggle the **Login Policy** field to enable / disable login policy.

License Settings

In the **Administration** menu, Administrators can access **License Settings**.



136: Administration > License Settings

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Based on access rights, you'll see options for your sublicense or both the sublicense and master license. To edit a menu item, click the **Change** button.

General Tab

On the General tab, you can enable the following fields:

Field	Description
General Settings	
Review management	If enabled, SmartView will require a new configuration policy to be approved prior to saving.
Reason for Change	If enabled, SmartView will require a comment when making changes
Allow personal landing page	Allow users to select which page is shown first when logged in. When enabled it allows to "favorite" a page and when the user signs in it will automatically sign in to that page (For example a specific location)
Summary Statistics	
Shipments	
Hide Shipments from Status	In the field, select shipment status that will hide shipments from the list of shipments.
Automatically approve shipments without alarms	If enabled, SmartView will automatically approve shipments that have no alarms.

The following tabs are included in this section:

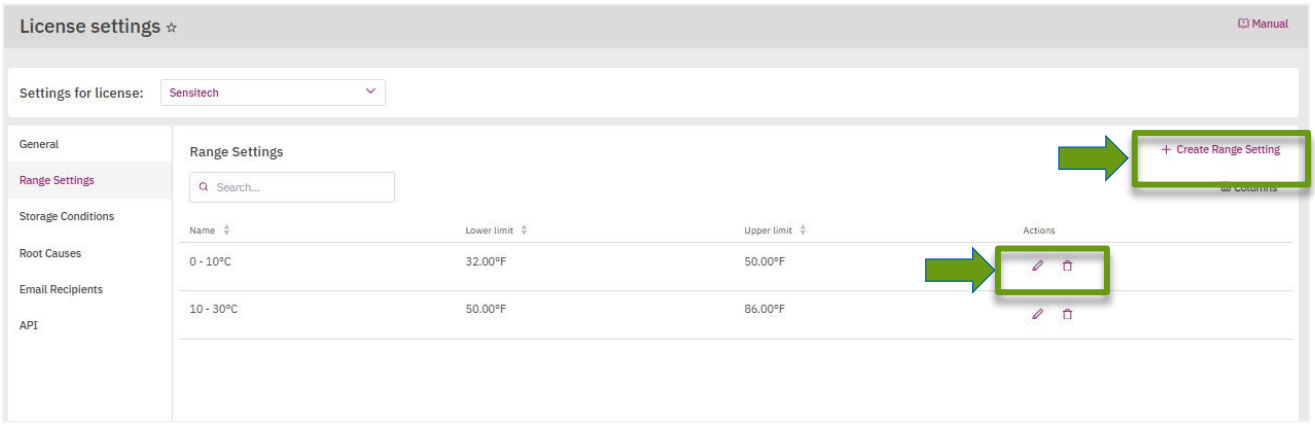
- General
- Range Settings
- Storage Conditions
- Root Causes
- Email Recipients

Range Settings

A user with the right to the site settings can define upper and lower limits for the graph (y-scale) to make it easier to compare different reports side by side.

Range settings allow users to set fixed temperature ranges on graphs, instead of relying on auto-scaling. This lets customers maintain consistent graph displays according to their preferences.

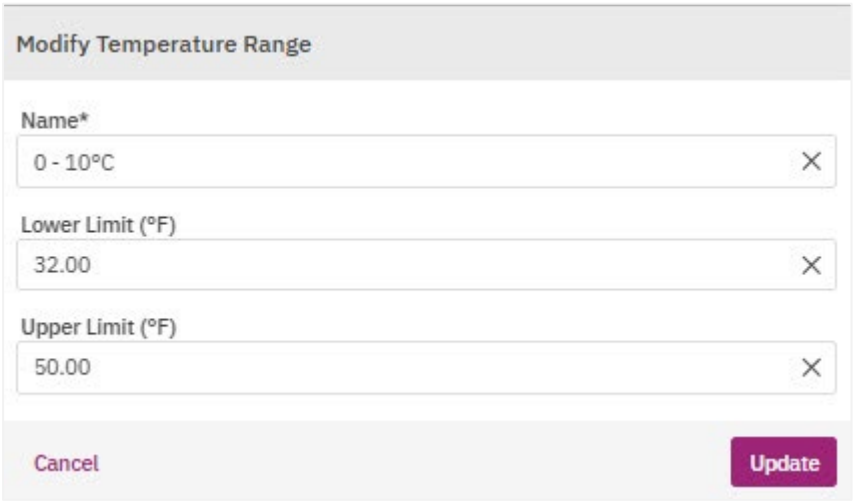
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137: Administration > License Settings – Range Settings Tab

Modify Range Setting

To modify range setting, select the range setting from the list and then click the pencil icon. Modify Range Setting pop-up screen displays:



138: Administration > License Settings – Range Settings Tab – Modify

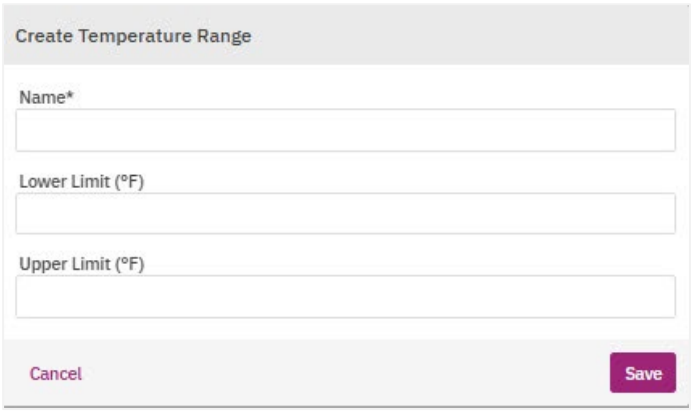
Make your changes to Name, Lower, or Upper Limit and then click **Update**.

To delete range setting, click the delete icon.

Create Range Setting

From the list of range setting, you can create a new range setting by clicking on the **Create Range Setting** in the top-right corner. The **Create Temperature Range** pop-up screen displays:

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139: Administration > License Settings – Range Settings Tab – Create New

Fields that should be provided:

- Name for the template
- Lower Limit
- Upper Limit

At least one of the limits should be filled in. Ranges are set based on the user settings (F or °C). Max. amount of the range is 10.

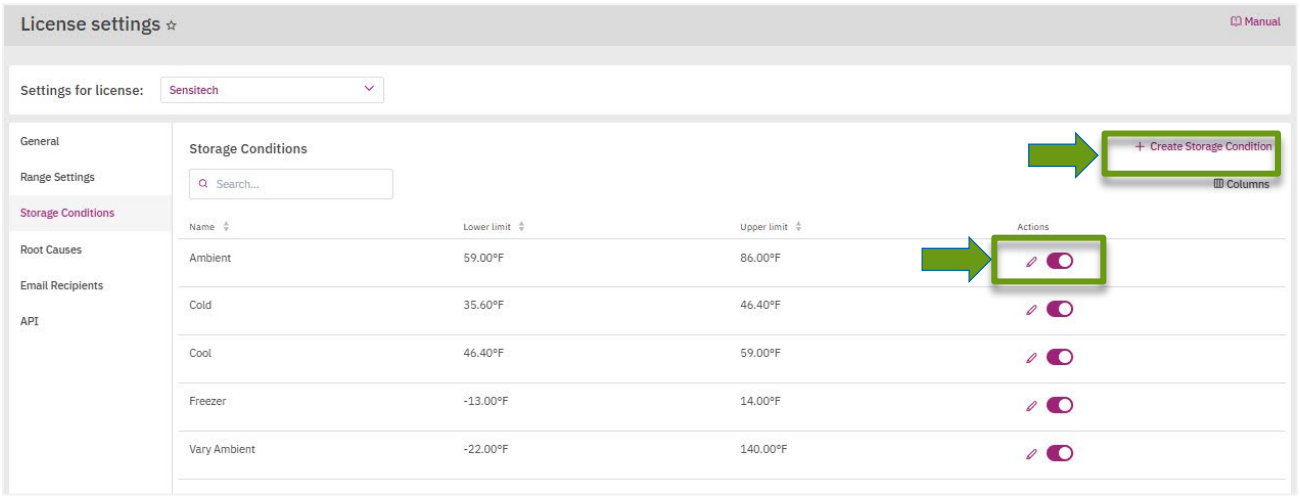
Storage Conditions

Storage conditions refer to optimal environmental factors—such as temperature, humidity, or other requirements—that must be maintained to ensure the product remains usable and stable throughout its lifecycle. These conditions are specified for each product and may include a global temperature range that must be adhered to during transfer or storage.

SmartView lets you create storage conditions in the administration settings, allowing you to easily reuse these conditions when assigning products, packaging systems, shipments, and sectors.

Switch to the Storage Conditions tab to view storage conditions already defined in the system:

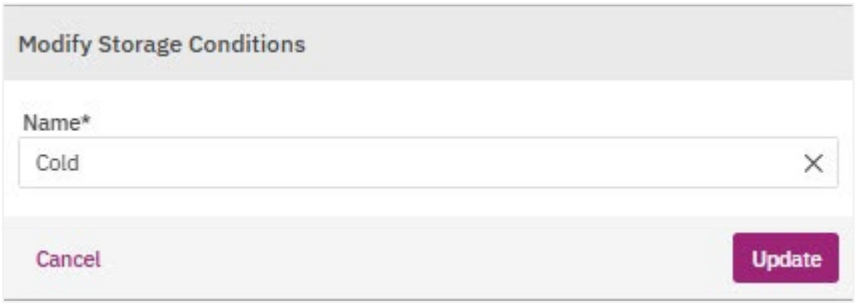
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140: Administration > License Settings – Storage Conditions Tab

Modify Storage Condition

To modify storage condition, select the storage condition from the list and then click the pencil icon. Modify Storage condition pop-up screen displays:



141: Administration > License Settings – Storage Conditions Tab – Modify

Change the name of the storage condition and then click **Update**.

To enable/disable storage condition, you can toggle the enable/disable field.

Create Storage Condition

To create a new storage condition, click **Create Storage Condition**. The Create Storage Condition pop-up screen displays:

Storage conditions are implemented to ensure that products are not placed in areas with incompatible storage requirements. Range settings serve to adjust the visual scale of the graph for accurate representation.

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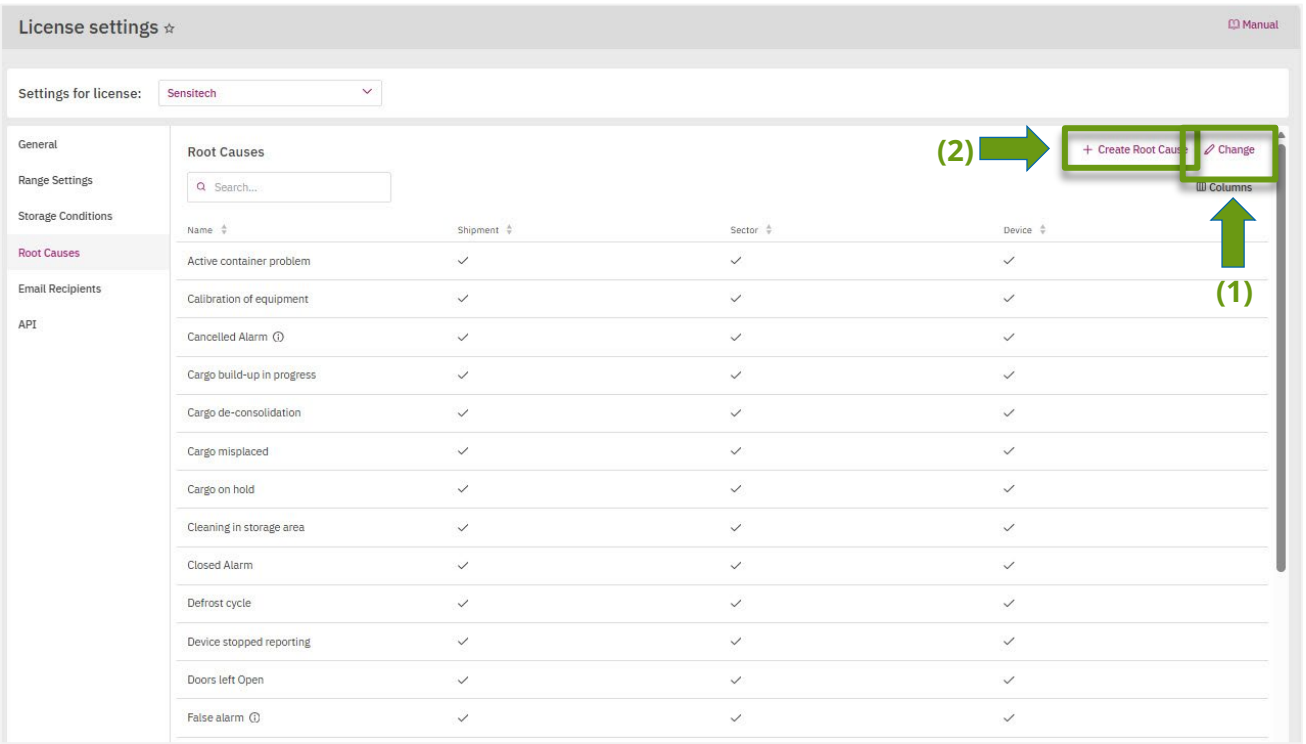
142: Administration > License Settings – Storage Conditions Tab – Create New

1. Set the Name.
2. Set at least one of the following: Lower Limit or Upper Limit.
3. Click **Save**.

Root Causes

In the Root Causes tab, the administrator can define customized reasons for excursions.

These reasons can then be used when managing a specific excursion by selecting a root cause and providing appropriate action for handling the excursion.

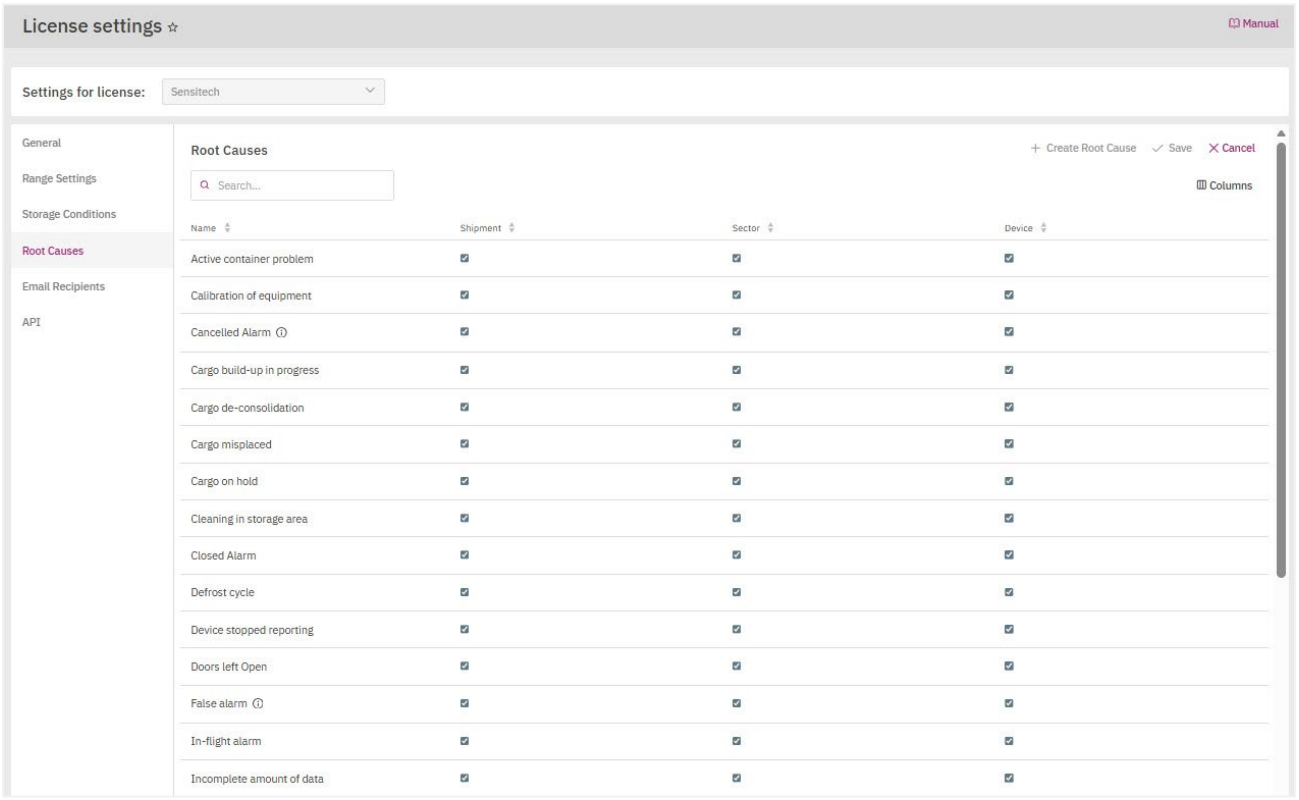


143: Administration > License Settings – Root Causes Tab

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Change Root Cause

To Change Root Causes, click **Change** **(1)**. The list of root causes is displayed in the edit mode where you can change configuration for your root cause and where it applies (shipment, sector, device).



144: Administration > License Settings – Root Causes Tab – Change

Create Root Cause

To create a new root cause, click **Create Root Cause** **(2).** The Create Root Cause pop-up screen displays:



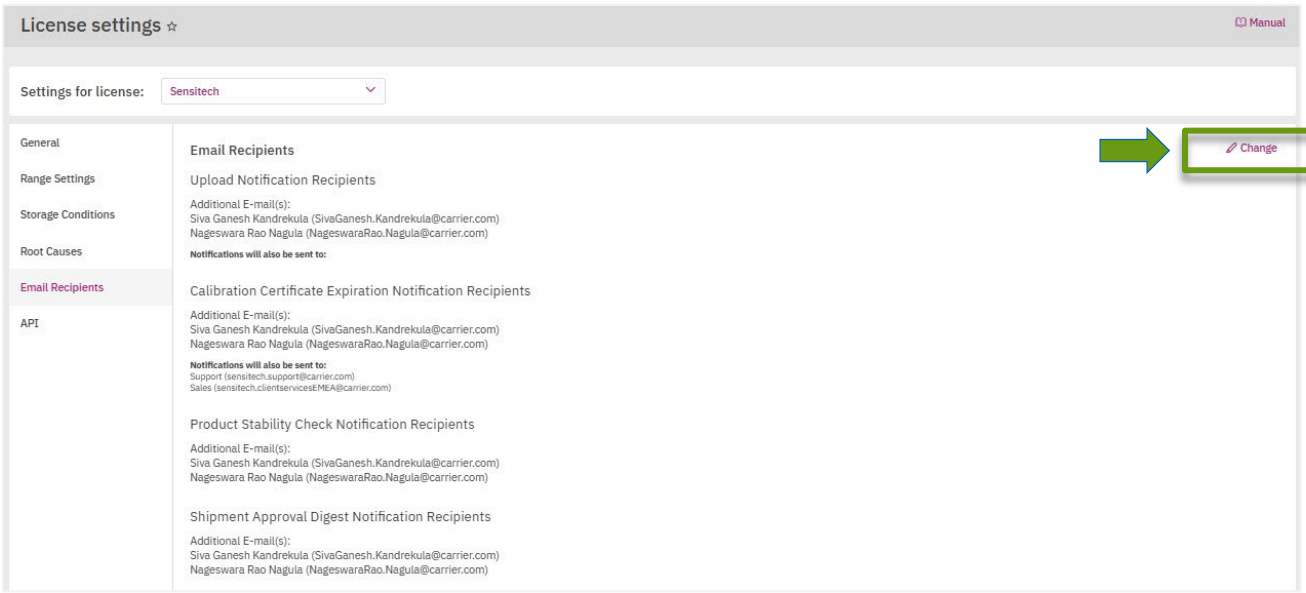
145: Administration > License Settings – Root Causes Tab – Create New

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1. Provide the name for the root cause.
2. In **Allow usage** in field, select where you want this root cause to be used:
    - Shipments
    - Sectors
    - Devices.
3. Click **Save**.

Email Recipient

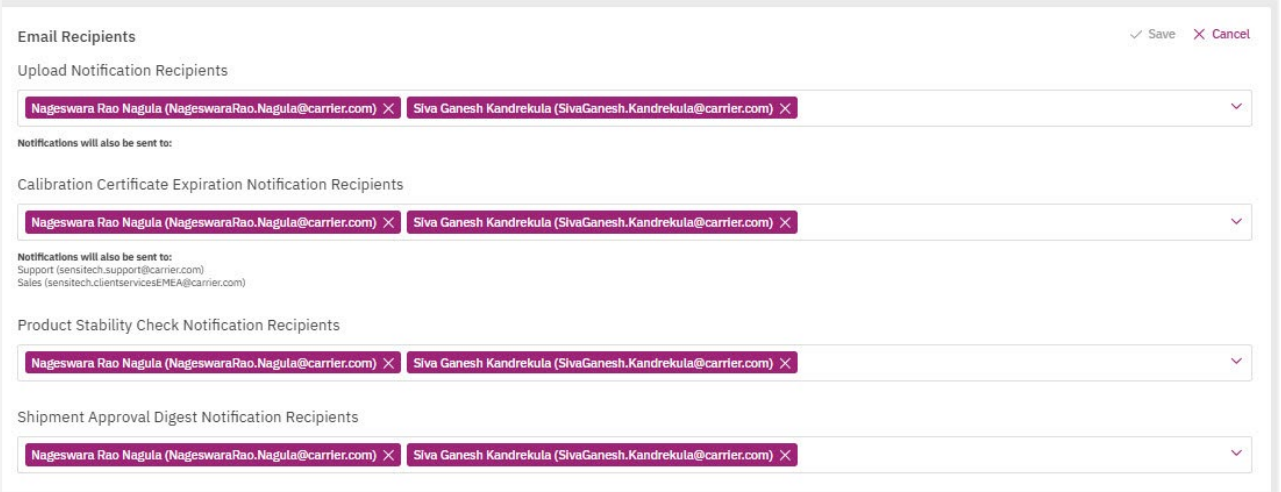
The email tab allows you to set email recipients for notifications. As an administrator, you can add up to 5 additional email recipients.



146: Administration > License Settings – Email Recipients Tab

Click **Change** to upload email recipients. Email Recipients screen displays where you can add or remove email recipients for various types of notifications:

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147: Administration > License Settings – Email Recipients Tab – Change

Email recipients are selected from the list of available users.

API

In the API tab, administrators can enable integrations by defining Webhooks for direct communication with other applications.



148: Administration > License Settings – API Tab

In addition, you can create an API user, which is only necessary if you are using an integration from an earlier version of SmartView; otherwise, API users should be set up through the standard User creation process.

You will find the structure of the SmartView API and the available Endpoints here.

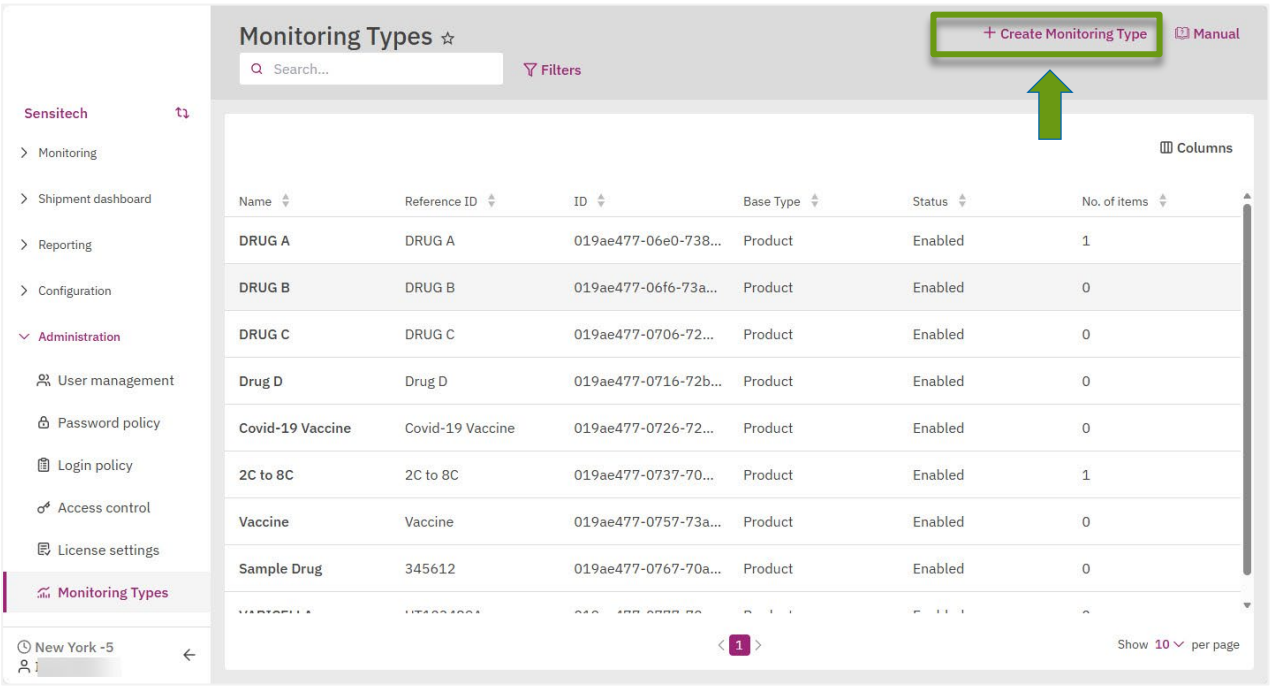
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Monitoring Types

Monitoring types have recently been introduced in SmartView and will temporarily coexist with Products. Both options will remain accessible simultaneously and reflect each other's changes. When a new monitoring type is created, a corresponding Product will also be generated. Furthermore, any updates made to a Monitoring type will be automatically applied to the related Product.

Monitoring Types List

From the left-side navigation, select **Administration > Monitoring Types**. Monitoring Types window displays a list of monitoring types:



149: Administration > Monitoring Types

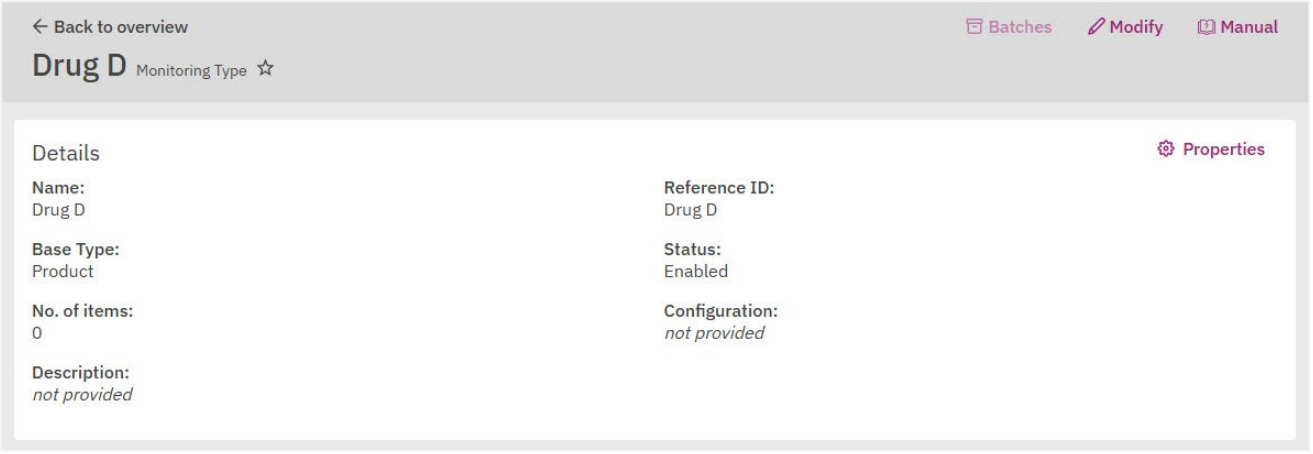
While viewing the monitor Type list, you can do the following:

- Create monitoring Type
- Select to view Monitoring Type page

Monitoring Type Page

To view the details of a specific monitoring type, select an entry from the list. Monitoring Type view window displays:

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150: Administration > Monitoring Type Page

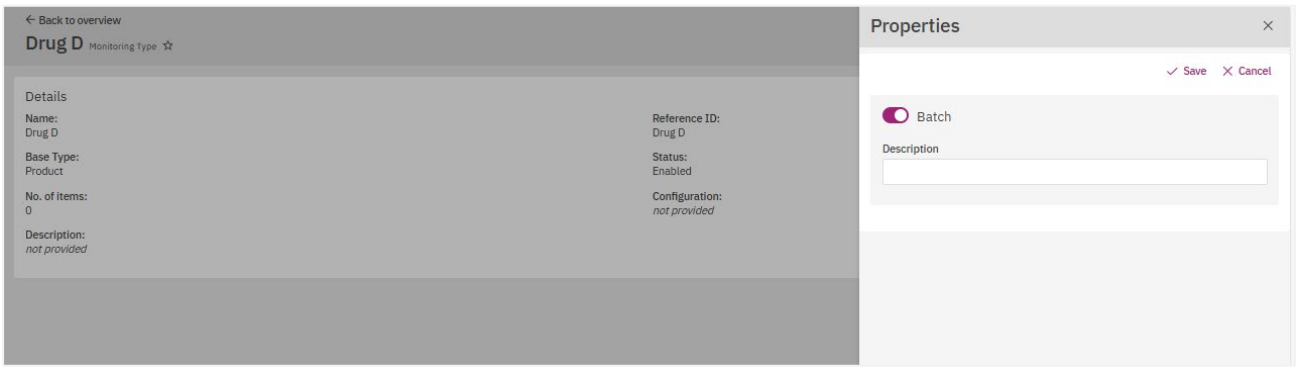
Reference ID is primary required to access monitoring type with the API.

General Tab

The details section of the page contains general information about the monitoring type which includes name, reference ID, status, etc.

Properties Tab

Click on **Properties** to view Monitoring type properties.



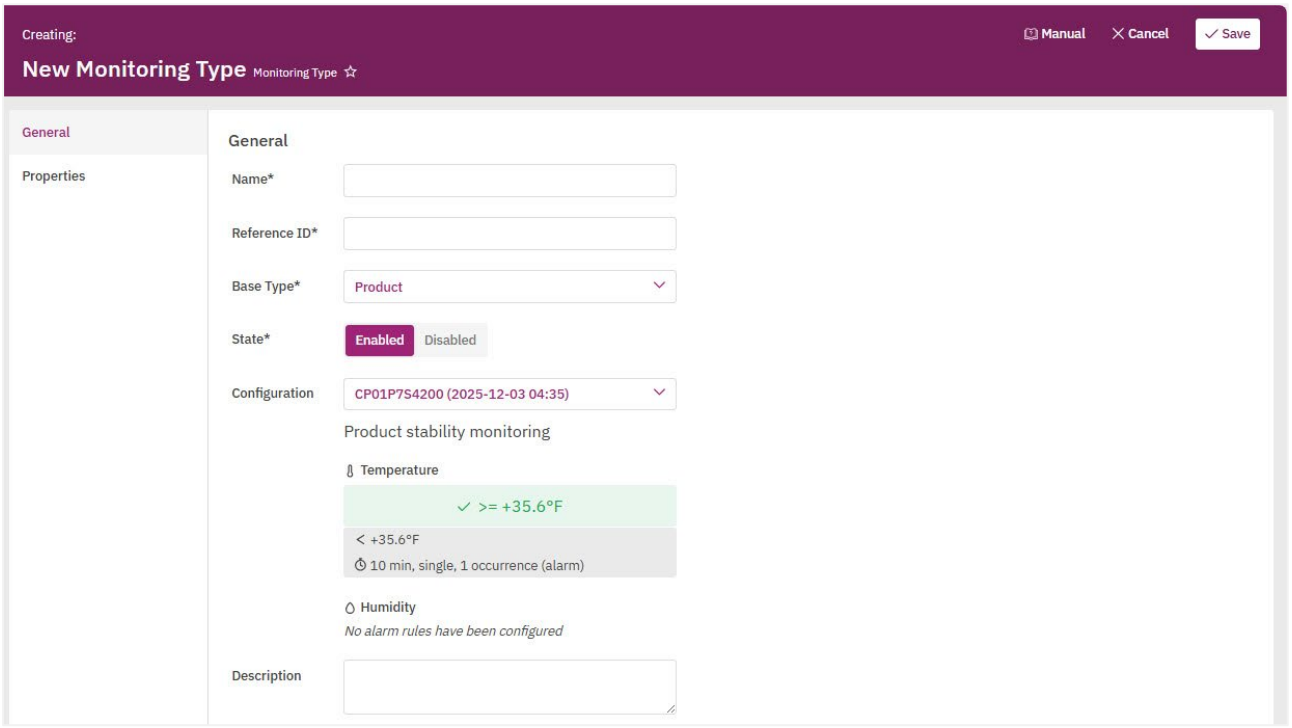
151: Administration – Monitoring Type Page (Properties)

In this section of the page, you can enable Batch field for the Monitoring type.

Create Monitoring Type

To create a new monitoring type, from the Monitoring Types list window, click **Create Monitoring Type**. This will open a New Monitoring Type window where you can create a new monitoring type.

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152: Administration – Create monitoring Type

To create a new monitoring type, provide the following information:

1. In the **General** tab, complete the following steps:

    a) Provide the name.
    b) In the **Base Type** select **Product**.
    c) Select Configuration from a list of available configurations.
    d) (Optionally) in the **Description** field, provide description.

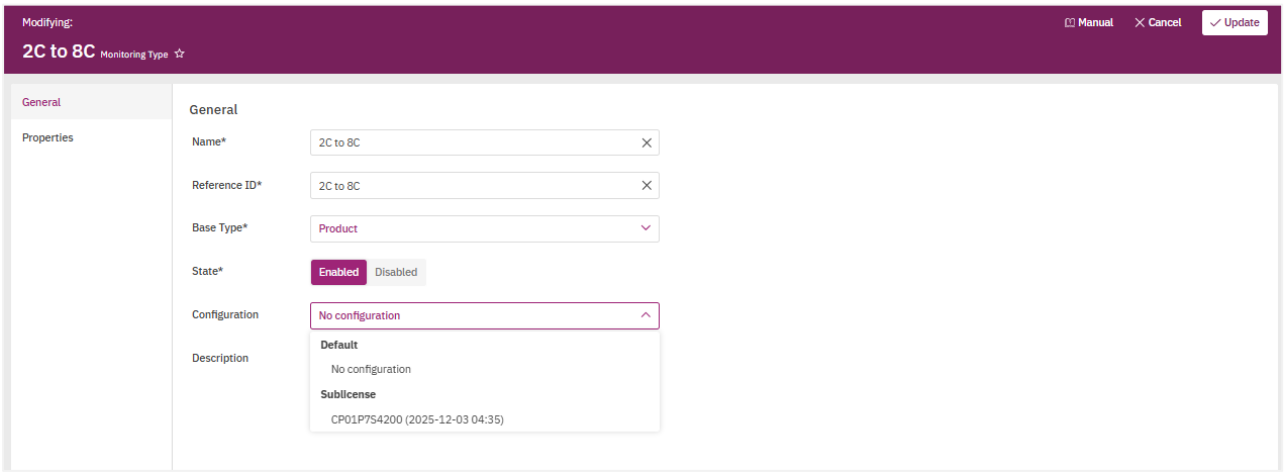
2. In the **Properties** tab, enable **Batch**.
3. Click **Save**.

Product stability rules are derived directly from the configuration policy. Only policies designated for Product monitoring are applicable.

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Modify Monitoring Type

To modify a monitoring type, from the monitoring page, click on **Modify** button. Monitoring type open in the modify mode:



153: Administration – Modify Monitoring Type

While viewing Monitoring type in the modify mode, you can make changes to monitoring type name, references, description. You can also assign a monitoring type of a different configuration, enable/disable it, and enable batch.

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Supported Devices

This section describes devices supported by SmartView.

SmartMonitor Family

SmartMonitor monitors pharmaceuticals that require temperature control during storage or transportation, transmitting data automatically to the SmartView cloud platform for efficient evaluation of product integrity.

For more information on SmartMonitor, refer to the following user guides:

- SmartMonitor SHIP L
- SmartMonitor SHIP M
- SmartMonitor SHIP S
- SmartMonitor SITE L

Wireless RFID Sensors

SenseAnywhere sensors wirelessly monitor and log RF data, sending it directly to the SmartView application.

Q-tag CLm doc Family

Users can log shipment temperature measurements with the Q-tag CLm doc. SmartView supports various Q-tag devices—including Dry Ice (D), Logger (L), and Reusable (R) — and displays detailed shipment data when files are uploaded. It also offers reporting and analysis features.

Supported devices by SmartView are:

- Q-tag CLm doc
- Q-tag CLm doc L (Logger)
- Q-tag CLm doc LR (Reusable)
- Q-tag CLm doc Ice (Logger)
- Q-tag CLm doc Ice R (Reusable)
- Q-tag CLm doc D (Dry Ice)

Fridge-tag Family

The Fridge-tag 2 L records temperatures at various locations or during shipping and is compatible with the SmartView system. After uploading the data file into the SmartView system, users are able to view detailed measurement information for the monitored goods. The system also provides reporting and analysis functions for users.

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Integrating Fridge-tag 3 devices with SmartView enables the use of stand-alone devices that send SMS alerts to designated recipients, while also reporting to SmartView for access to the features of the data management software.

Supported devices by SmartView are:

- Fridge-tag 2 L
- Fridge-tag Ultra Low

TempTale Ultra Family

Supported devices by SmartView are:

- TempTale Ultra
- TempTale Humidity
- TempTale Ultra 64K
- TempTale Ultra Dry Ice Probe
- TempTale Ultra Probeless Dry Ice
- TempTale Ultra Probe
- TempTale Ultra BLE
- TempTale Ultra Fit

Multidrop data is not supported yet by SmartView.

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Glossary

Carriers – In SmartView, a carrier object represents an Airline for shipping goods. Only administrators can add new airline carriers. For road, rail, or sea shipments, manually enter the carrier name.

Configuration The settings within a device that contain the different metrics. For example, Log-Interval, Alarm settings, etc.

Customer The recipient of a shipment.

A monitoring **device** is capable of measuring temperature, humidity, light, shock, and other variables. Information can be accessed through automatic uploads to our servers, an API, or the SmartView portal.

Event Profile consists of a set of rules designed to track device readings. Applied to shipments or sectors, it compares incoming data with these rules; when any rule is breached, the system identifies an excursion and notifies assigned users by email or SMS.

An **excursion** happens when an event rule is broken. Users should review it, then acknowledge or close it with a brief explanation of the cause and resolution.

Location A physical location that is used to store packages. Each location consists of multiple sectors. Packages will mostly be stored for a longer time here.

Milestone A marker somewhere along the process that can indicate something special happening. (In case of a shipment, it could mean that a shipment arrived at some stop-over station).

Product A physical item shipped with stability rules that set alarm thresholds for usability. Stability is checked using samples from connected devices, based on shipment records or sector groups. Products may need specific storage conditions and a global temperature range during transfer or storage.

Root Cause A reason for why an excursion occurred. There can be various reasons why the excursion occurred, to streamline the way that excursions can be resolved we use root causes to determine what really triggered this excursion to happen.

Sector refers to the specific place where each package is stored, with sectors offering various storage conditions, such as cold refrigeration or ambient room temperature. Each sector supports storing and monitoring different package types, and packages are tracked by an event profile that provides alerts about any discrepancies.

SectorAssociation

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Assigning devices to a sector is essential for package monitoring in that region. The SectorAssociation feature streamlines this task, giving users the option to define how long a device remains linked to a sector. Data gathered from the device during this period is used to efficiently monitor the specified sector.

Shipment is the transfer of a package from A to B, using planes, trucks, trains, or other transport. Multiple devices monitor the package, tracked via ShipmentAssociations. An event profile can be assigned to detect discrepancies during transit.

ShipmentAssociation is a link between a device and a shipment. This link contains information about the time the association got started and the time the associated ended. Any data that comes in for that device during this period will be considered to belong to the related shipment.

SubShipment is part of a larger shipment (master shipment) but can be used to split device monitoring/event profiling. You can, for example, have an “inside” and “outside” of a shipment, for monitoring inside a package and outside of a package.

Storage Condition A range to define between which temperatures a product should be transferred or stored. This range will be used in reports and graphs to indicate if a product has been outside of this ‘safe’ zone.

Role – a certain preset of access restrictions that can be granted to a user.

Configuration Policy contains the device and alarm settings that will be applied to a device. The alarm settings defined in the Configuration Policy are also used for shipment and sector monitoring.

The **Alarm Profile** links alarm levels from the Configuration Policy to notification recipients. When you select an Alarm Profile for a sector or shipment, it determines which Configuration Policy applies to the device in that sector or shipment.

Audit Trail will track any changes/manipulation that occurred within the system. The Audit Trail cannot be manipulated/deleted

TCI stands for temperature-controlled item which would be an item where end-to-end monitoring is required over its whole lifetime which can include different associations (for example sectors and shipments). For utilizing the TCI functionality an integration is required.

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