



InSite Quick Start Guide





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1 Overview

This manual gives step-by-step instructions to show you how to log in to InSite, set up the navigation tree, user access, and communication information. From the navigation tree you can connect to controllers, set up directory, site, control system, and unit information.

2 Launching InSite

To begin using InSite, open a Web browser:

If running the same computer on which InSite was installed, type **http://localhost/InSite** inside the browser field. If running the program from another computer, use the machine name or IP address instead of **localhost**. The InSite Enterprise program will open.

You can begin using InSite by creating a directory structure **Section 5, Create A Directory Structure** or setting up users **Section 5.4., Set Up Users (Optional)**.

3 Login

The login page is the first page that appears when the program is started.

1. Enter your Login ID and password into their respective fields (the **Password** field is case sensitive).

Users created by the installation are "user" with a password of "pass" for basic user access to the program, and "administrator" with a password of "pass" that has full control of the InSite Enterprise system. It is strongly recommended that you rename these users and change the passwords as soon as the program is installed and running. It is also highly recommended that each user have his/her own login. For more information, go to User Manager and Group Manager sections of the InSite online help.

2. Press the **Login** button or press Return on your keyboard.



Figure 3-1 - InSite Login

3. Click the **I Agree** button to begin using the application. (First-time users will be presented with the license agreement window.)
4. Once your login has been validated, the home page will open where the navigation tree and main information window are located.

4 Licensing

InSite has basic (core) and extra features that are activated by obtaining a license. The license key must be entered on the Feature Licensing page to activate the desired feature. A core license key activates core features and the feature license key activates feature functionalities of InSite.

The licensing activation page is accessible from the Help drop-down menu. The menu will only be visible with certain user privileges enabled to allow you to add/edit software license keys.

1. Locate your unique Hardware Fingerprint number on the Feature Licensing page.
2. Call CPC Customer Service at 770-425-2627 with the Hardware Fingerprint to obtain a license key for the desired features you wish to activate.
3. Click the **Add Feature** button on the Licensing page and enter the key into the boxes provided.
4. Click **Save**.

The key entered will know what feature it is associated with and will populate the appropriate field(s) on the screen. To override an existing key, a new key will need to be added and replace the existing key.

Click **Cancel** to stop and exit.

4.1. Core Licensing

The core features of InSite require a core license key. Only new users will need to enter this key. After a period of 365 days a reminder window will appear and prompt you to renew the Core Key. Contact CPC Customer Service for renewal.

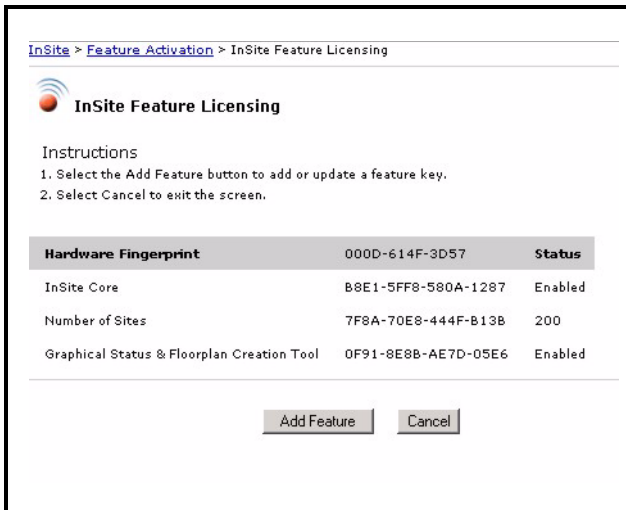


Figure 4-1 - InSite Feature Licensing Page

For more information on Status definitions, see the **Feature Activation and Licensing** topic in the InSite online help.

4.2. Feature Licensing

All possible InSite features will be displayed on the InSite Feature Activation screen.

5 Create A Directory Structure

5.1. Add A Directory

Directory structures include a directory, a site, and a control system. Units will automatically be populated once the control system has been added. To begin using the program by setting up a directory structure:

1. Open the Admin Tools drop-down menu.
2. Click **InSite Setup > Directory Manager**.
3. Click the **Add Directory** button. The Directory Configuration page opens.
4. Enter the directory information into the fields and click **Save**. Your directory should now appear in the navigation tree where you can begin adding sites and other view levels.

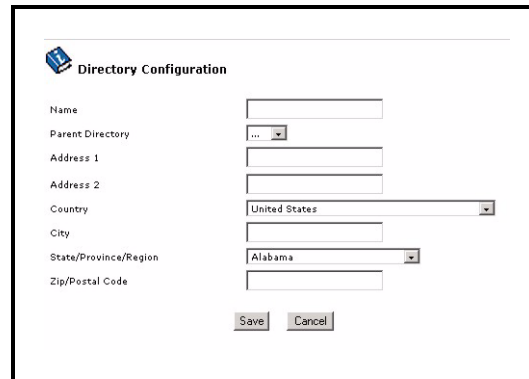


Figure 5-1 - Directory Configuration Page

Once a directory is created, sites and control systems can be added and will become visible inside the navigation window. These different levels or "nodes" make up the navigation tree structure.

5.2. Add A Site

To add a site from the navigation tree:

1. Mouse-over/right-click the directory you wish to add the site to open the directory menu.
2. Click **Add Site**. The Site Configuration page opens.

You can also access this menu from the **Site Manager** located under the Admin Tools drop-down list.

3. Enter the site information into the fields and click **Save**. The site you just added appears in the navigation tree where you can continue to add sites and other view levels if desired.

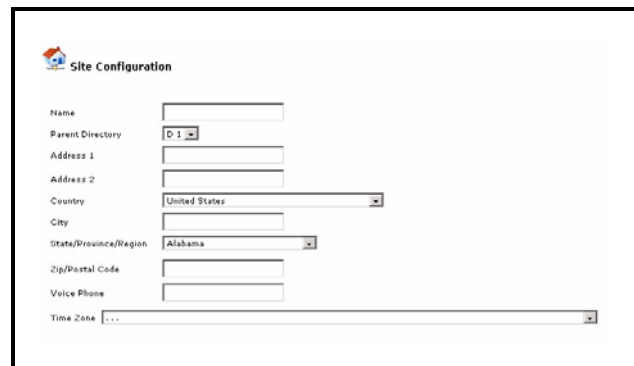




Figure 5-2 - Site Configuration Page

Click **Cancel** to stop and exit the page.

NOTE: Click the **Refresh** button  at the top of the navigation window to see any new levels that have been added. The **Windows Refresh** button on the browser will log the user off. 

passwords:

1. Open the Admin Tools drop-down menu.
2. Click **InSite Setup > User Manager**.
3. Click the **Add User** button. The User Configuration page opens.
4. Enter the user information into the fields and click **Save**. A user has been created and is saved to the database.

5.3. Add A Control System

To add a Control System from the navigation tree:

1. Mouse-over/right-click the site you wish to add the control system to (a control system is a descendant level of a site).
2. Click **Add Control System**. The Control System Configuration page opens.
3. Enter the control system information into the fields and click **Save**. The new control system is visible in the navigation tree. Continue to add other view levels if desired.

Figure 5-3 - Control System Configuration Page

Figure 5-4 - User Configuration Page

5.3.1. Security Settings

Security settings for InSite are defaulted at the group configuration level normally. Under the **Optional** section on the Control System Configuration page: If the protocol checkbox is enabled here (at the control system level), InSite will use the protocol information entered at the control system level and *bypass* the information at the group level for only the units located under this control system.

What Else Can You Do On The User Configuration Page? Set the Engineering Units default, activate GS Screen menus, and enable GS Screens to be set as your home page.

You have now successfully created a navigational tree structure where you can continue adding directories, sites, and other view levels.

5.4. Set Up Users (Optional)

It is recommended that a directory structure be set up first, but users with administrator privileges can set up users and