eCharge

How to Guide.

A complete guide to operating your eCharge infrastructure.

Contents Page.

Contents:

Adding and Viewing Users.

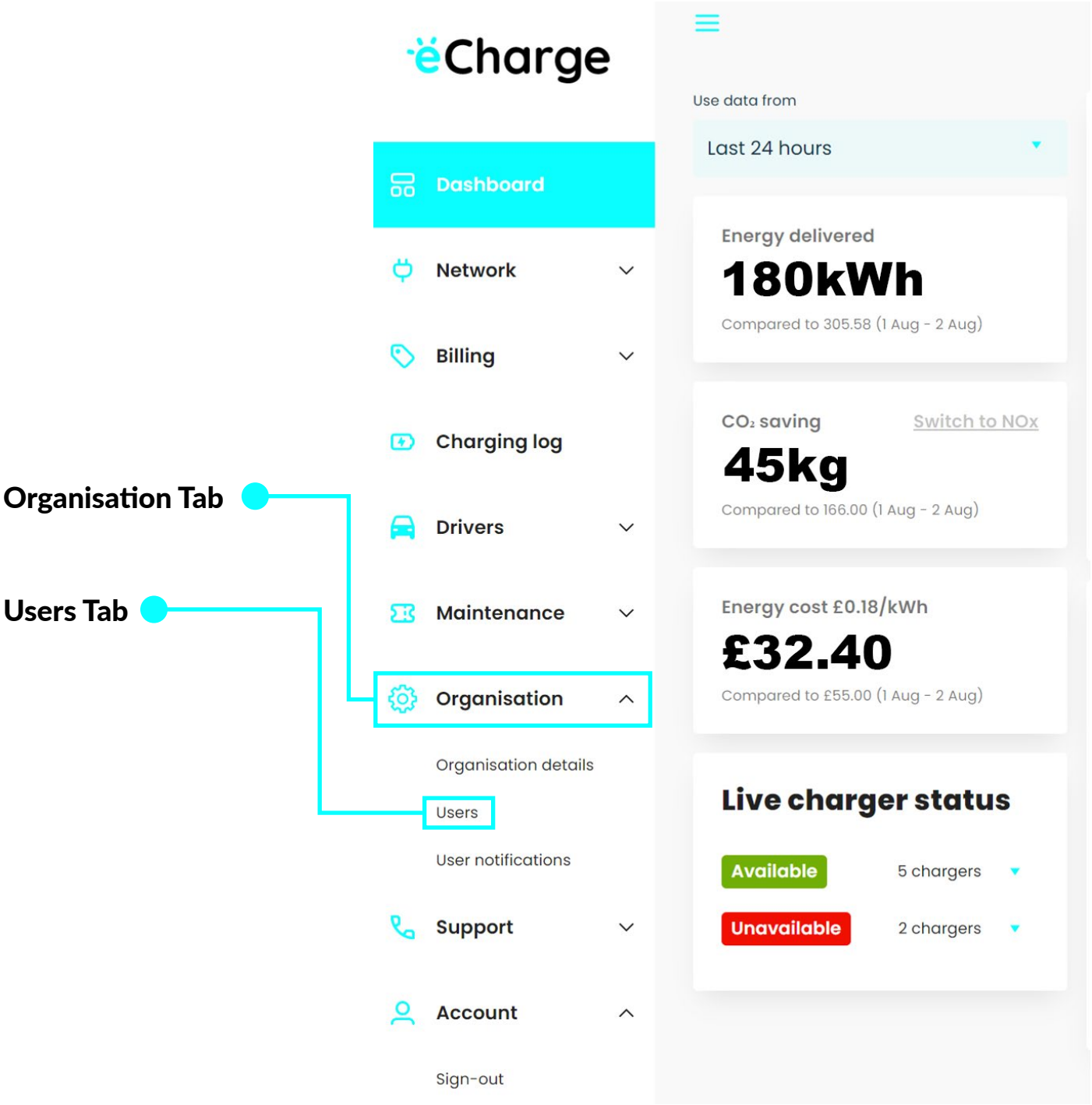
How to add new users to your organisation in the eCharge web portal and view all previously created ones.

Contents:

1. Organisation Tab.

To get started, click the arrow beside "**Organisation**" from the navigation menu to open up that section.

Click "**Users**" from the expanded menu.

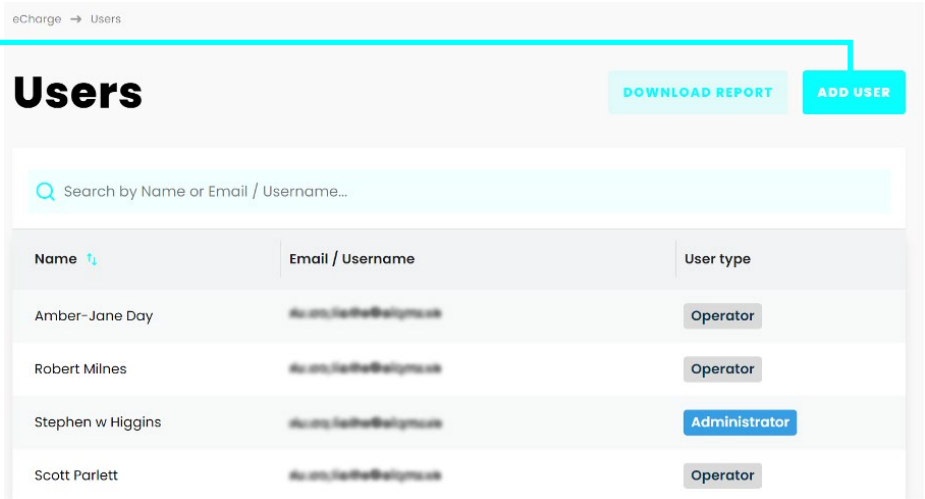


2. Users Screen.

Here you will find a list of all previously created users. If you have a lot of users, they will be separated into multiple pages.

Click the "**Add User**" button to begin adding a new user.

Add User



3. Add User Details.

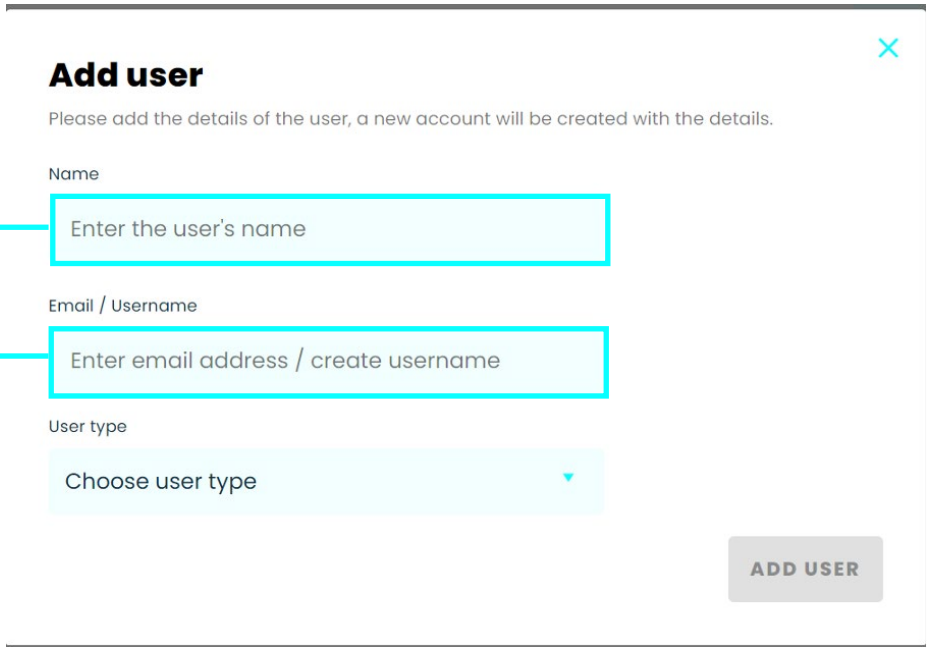
You can add the details of your new user in the pop up.

User's Name

Enter the name of the user in the box provided under "**Name**". This would normally be the users real name to help distinguish one from another, not a username for logging in.

User's Email

Add an email for your new user in the box under "**Email / Username**". This will be used as the user's username for the purposes of logging in.



4. Save New User.

Once you have entered all of the details for your new user, click the "**Add User**" button to save it.

You will now be returned to the users screen where you will find your new user in the list with all previously created users.

Adding and Configuring Access Control Profiles.

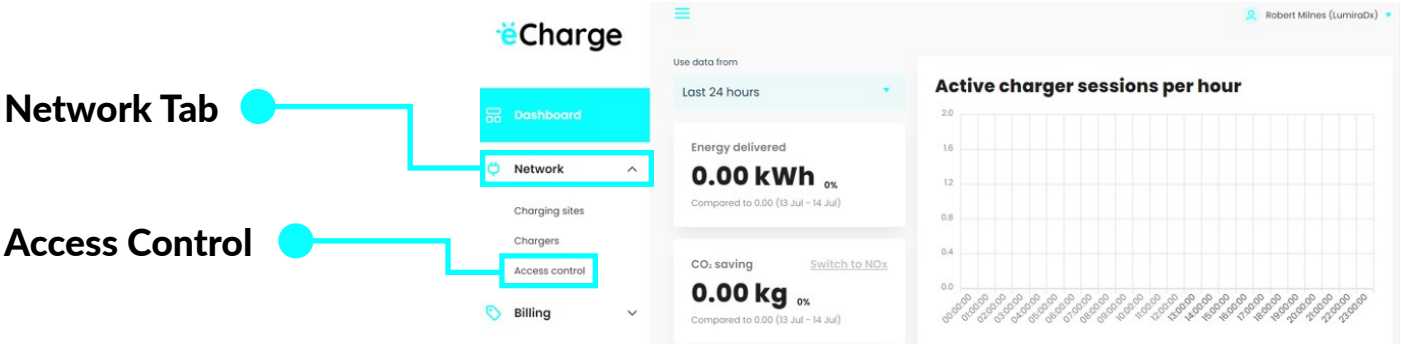
Correctly configured access control profiles allow you take full control over when and where drivers can charge and how much they should be paying to do so.

Contents:

1. Network Tab.

To get started, **click the arrow beside "Network"** from the navigation menu to open up that section.

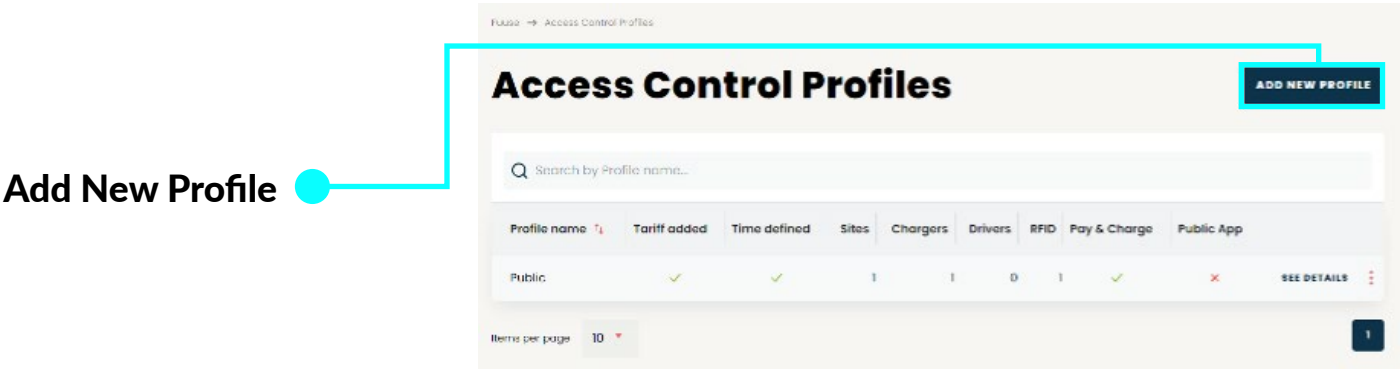
Click "**Access Control**" from the expanded menu.



2. Access Control Profiles Home.

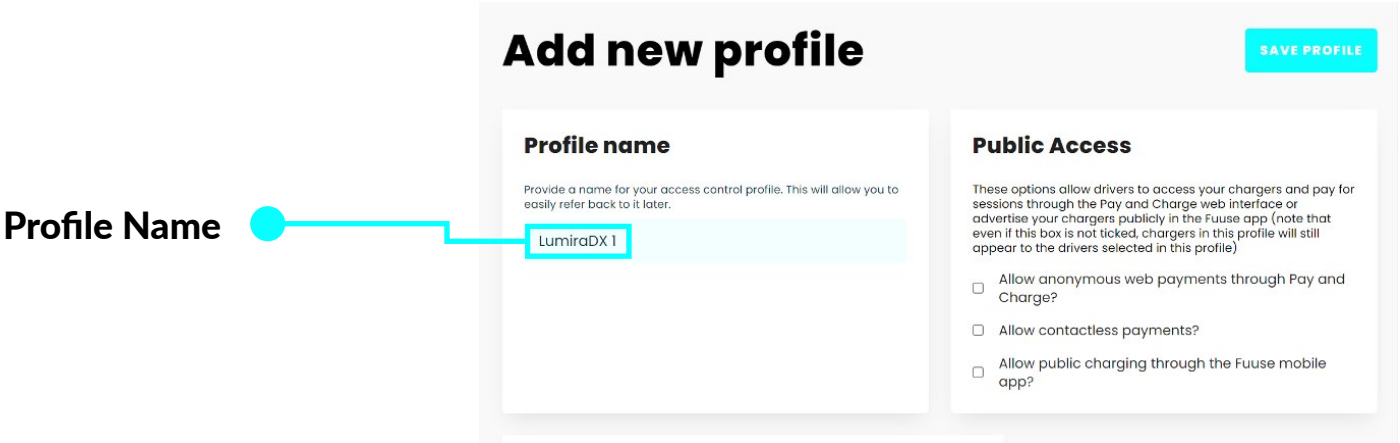
Here you will find all previously created profiles listed. If you have a lot of profiles, you can use the search bar to find specific ones if needed.

To add a fresh access control profile, click the **"Add New Profile"** button.



3. Profile Name.

Start off your new profile by giving it a unique name. While this can be anything you want, it is wise to make it something distinguishable that speaks to the intention of this particular profile. This will also help tell one profile from another more easily if you intend to create many.

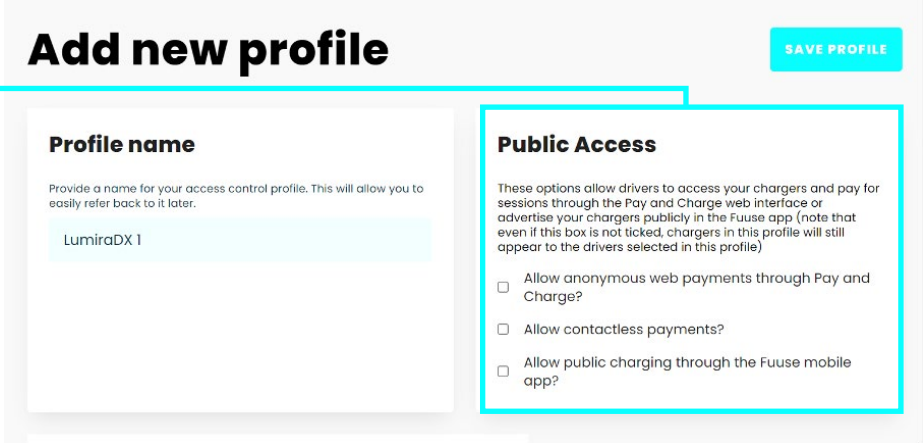


4. Public Access Settings.

Here you can specify how to handle public access to any sites and chargers associated with this profile. By default, these two options are unchecked meaning only named drivers / driver groups / vehicles / RFID's will have access. Check the first box if you wish to allow members of the public to use sites and chargers managed by this profile. Check the second box to allow members of the public using chargers managed by this profile to use the eCharge mobile app to do so.

***Remember** - These particular settings ONLY apply to anonymous members of the public and not your named drivers.*

Public Access



5. Adding Tariffs.

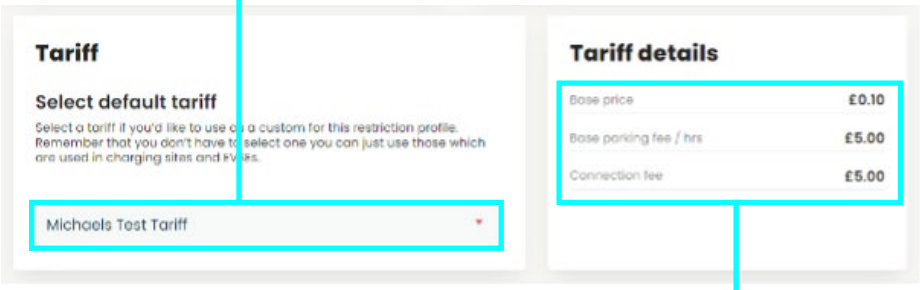
Here you can add a tariff to your profile. This is not a requirement for the creation of the profile. Any access profile without a tariff assigned will default to the tariff set on the sites and EVSEs you assign to the profile.

Tariff Selection

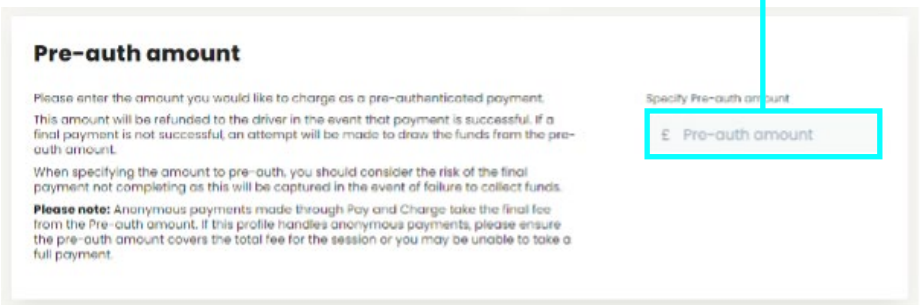
1. Use the drop down to select a previously created tariff. You can also choose to create a new tariff from here if required.

Tariff Details

2. With a tariff selected, the details of it will display here. Switching between tariffs will automatically update these details.



When using tariffs, you can also specify the pre-authorisation payment amount using the box provided. This is not required if you are not applying a tariff to the profile.



6. Time Availability.

Here you can set a global time frame for when all charge sites and EVSEs managed by this profile can be accessed and used.

Day Selection

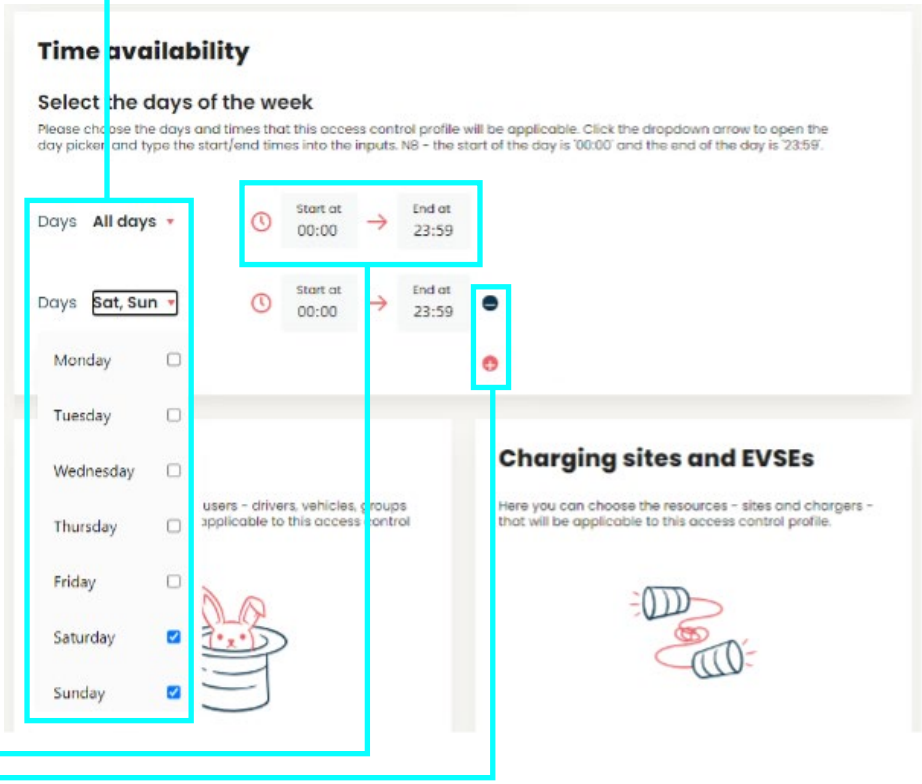
Use the "**Days**" dropdown to select which days of the week are to be used. By default this will be all days. Click the check boxes to select certain days or a combination of them.

Start and End

Click the time under "**Start at**" and "**End at**" to alter the specific time frame. By default this is set from midnight to one minute to midnight covering a 24 hour period.

Extra Time Frames

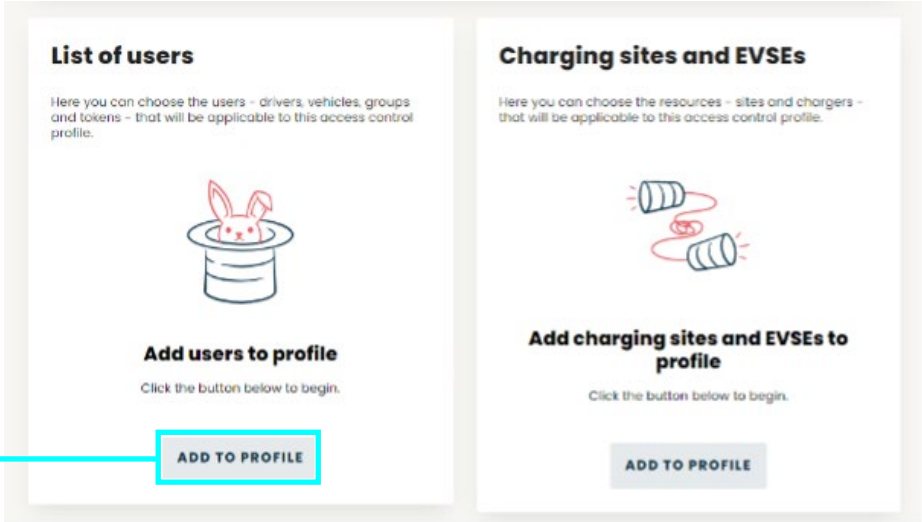
Use the plus button to add more time frame options. The minus button besides each one can be used to delete them.



7. Add Users.

To begin adding users, drivers, driver groups, vehicles and RFID tokens, click the "**Add to Profile**" button in the "**List of users**" section.

Add to Profile



User Type

1. Switch between the different type of user you want to add using the tabs provided here. Your options include:
- Drivers
- Groups of Drivers
- Vehicle
- RFID Card

Profile Selection

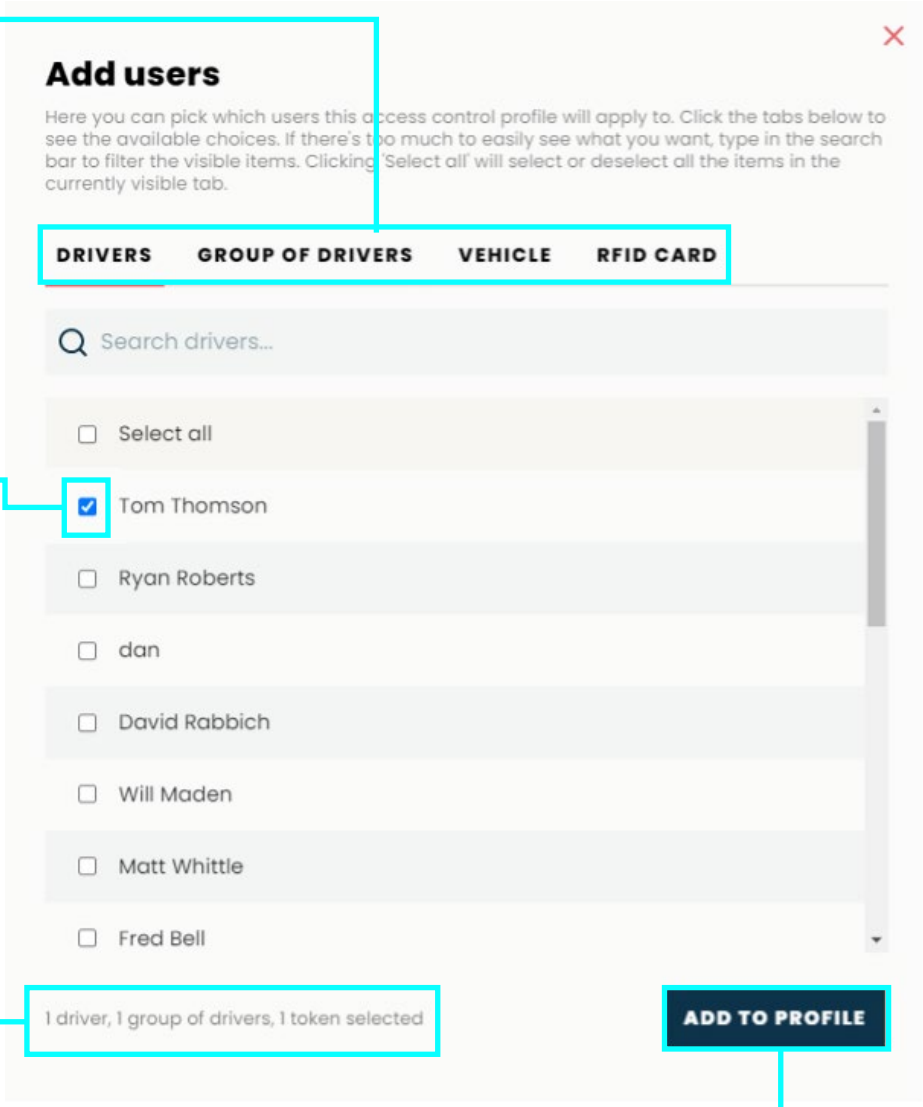
2. Select the driver / group / vehicle / RFID card using the check boxes provided. Use the search box at the top if you have a lot of users and want to find a specific one.

Summary

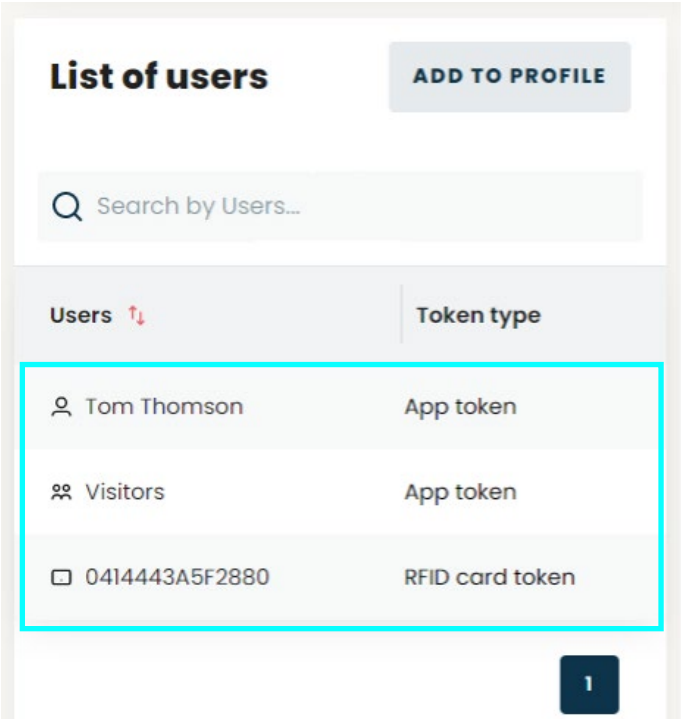
3. The summary at the bottom shows what is currently selected across all of the tabs.

Add to Profile

4. Once you have added all users required, click the "Add to Profile" button.

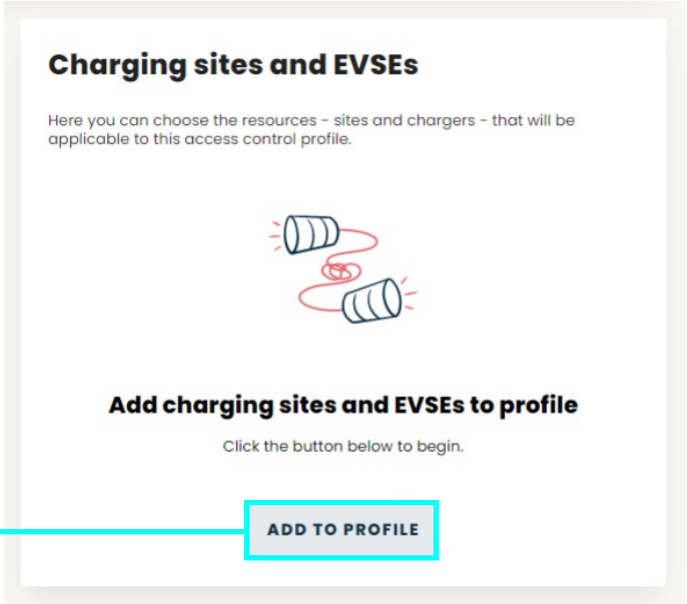


You will now be returned to back to the main Access Control Profiles creation screen. Your newly added users will display in the list.



8. Add Charging Sites & EVSEs.

To begin adding charging sites and EVSE's that you have already created in ECharge, click the **"Add to Profile"** button in the **"Charging sites and EVSEs"** section, as shown below.



Add to Profile

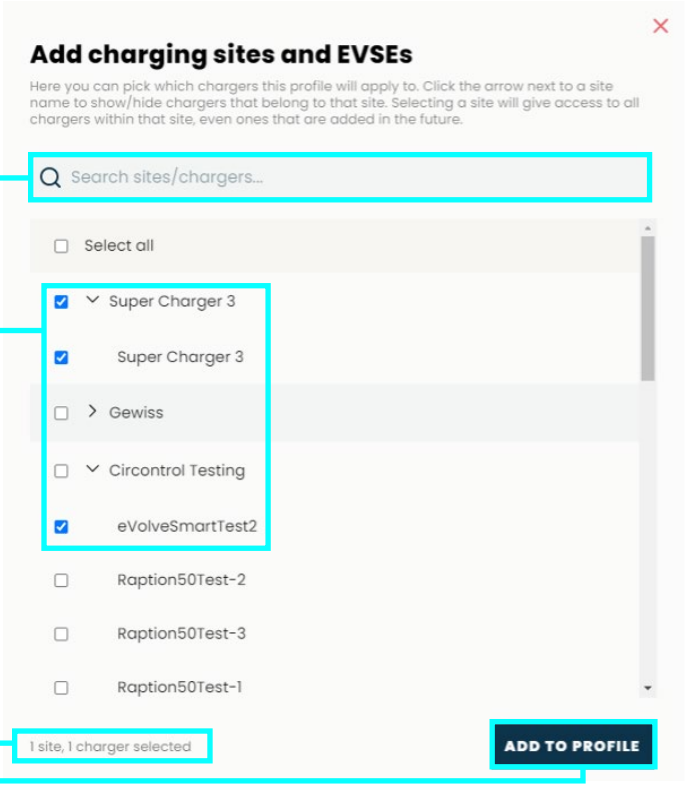
If you have a large number of sites / EVSEs, you can use the search box provided to find specific ones.

The information here is displayed in two levels - The top level is the charging site. Clicking the arrow beside a charge will drill into that site and reveal the second level, which consists of all EVSEs at that site. Clicking the check box next to the site will select all EVSEs at that site.

You can also select individual EVSEs within a site by clicking its checkbox if you don't wish to use them all for this profile.

The summary at the bottom will display the combination of sites and chargers selected. "1 site" implies the site plus all chargers in it have been selected. "1 charger" implies an individual EVSE at a site with multiples has been selected.

With all of your sites and chargers added, click the "Add To Profile" button to lock your choices in.



Search Box

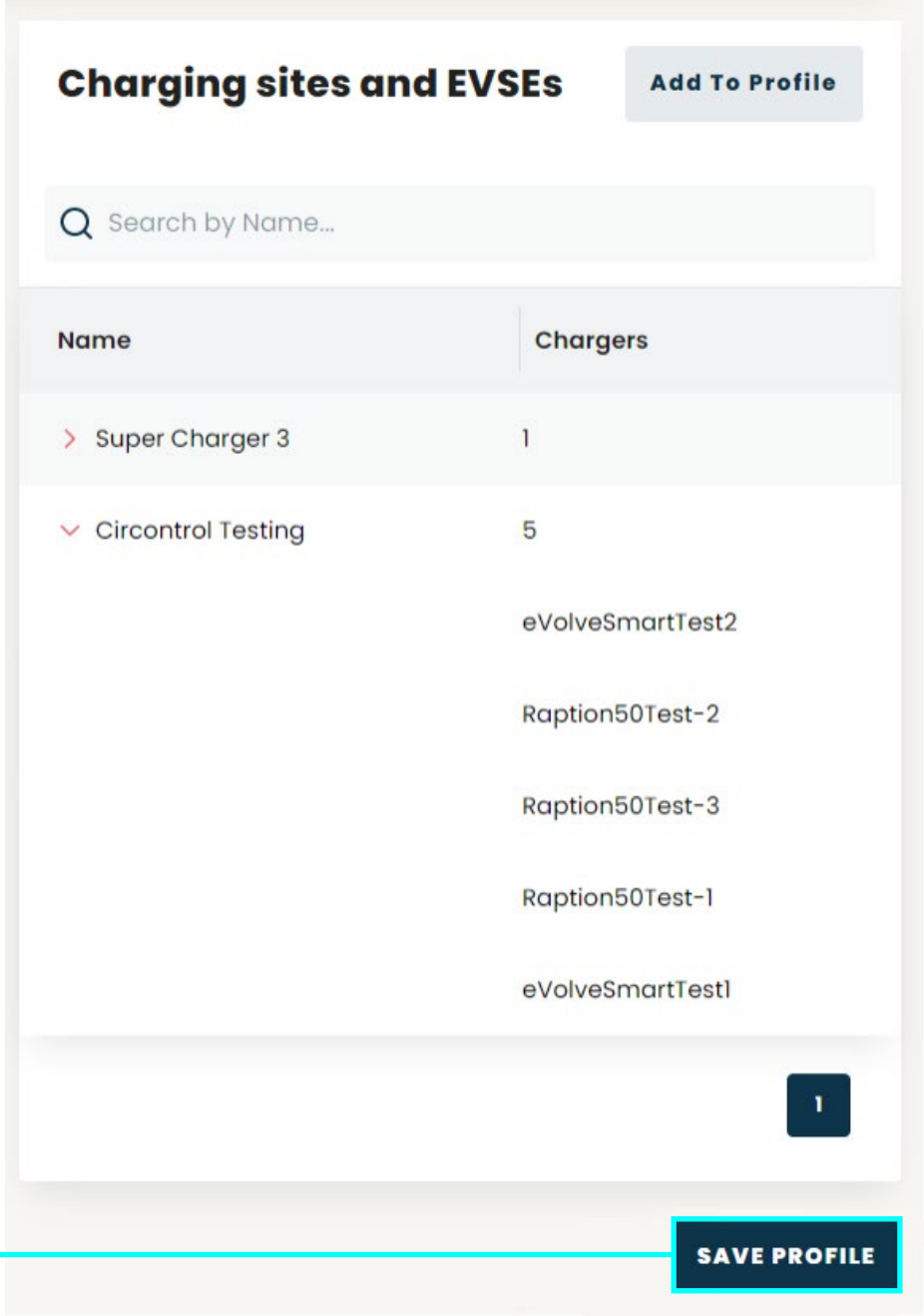
EVESs

Summary

Add To Profile

9. Review Charging Sites / EVSEs and Save.

You will be returned to the main profile creation screen once more. Any charging sites and EVSEs that you just added will now display in the designated section, as shown below. Finally, if you are happy with your access control profile configuration, click the **"Save Profile"** button to finish up.



Save Profile

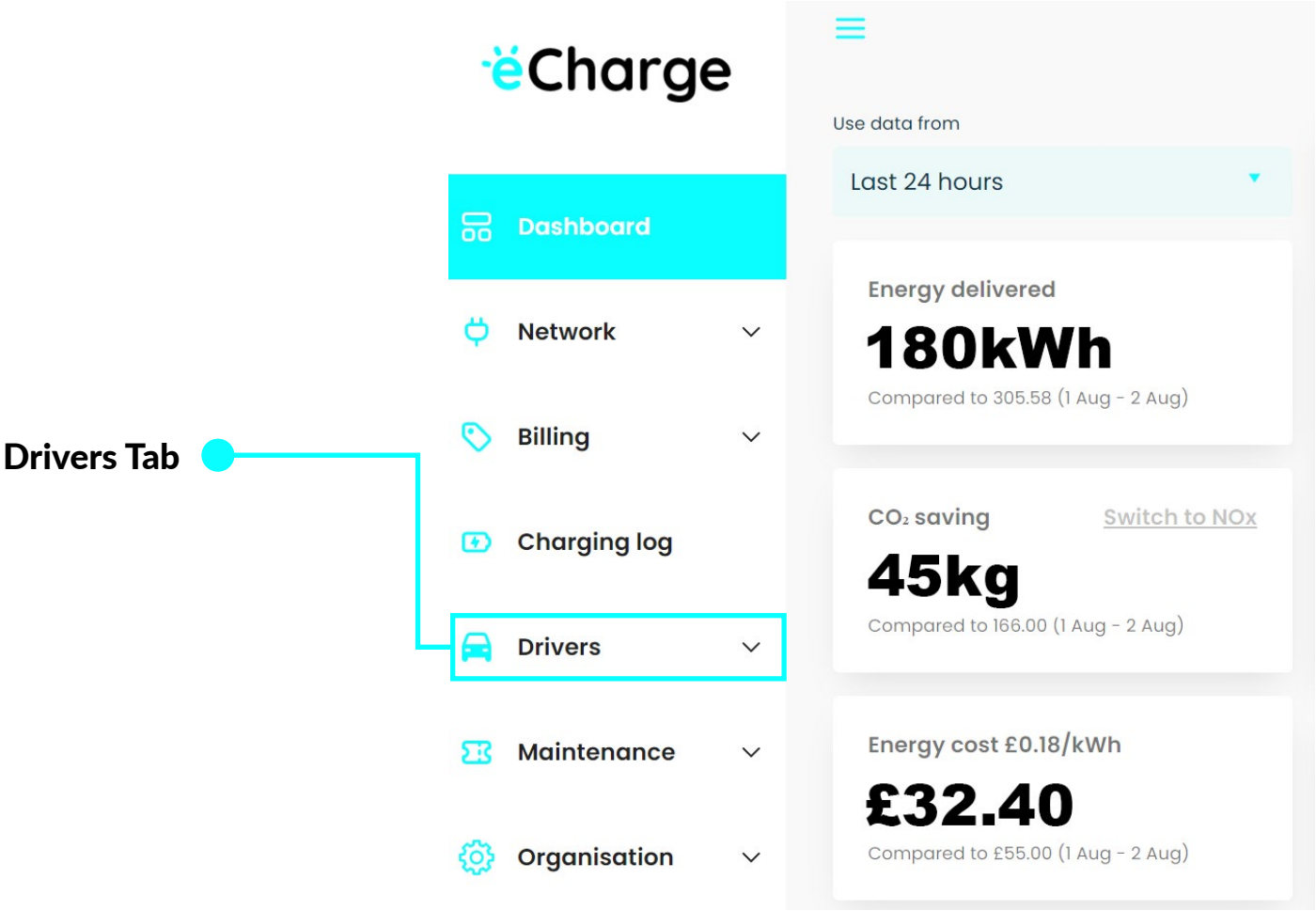
Adding and Viewing Drivers.

This guide will walk you through the process of adding new drivers and how to view their individual activity.

Contents:

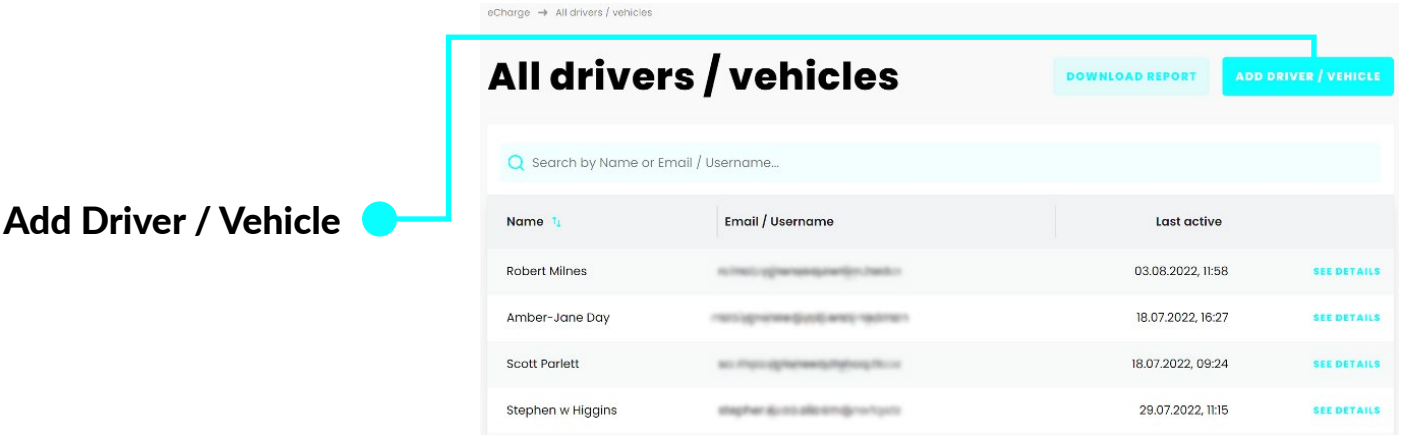
1. Drivers Screen.

From the side menu of the ECharge web portal, click “Drivers” to open that section.



2. All Drivers and Vehicles.

On the All drivers / vehicles screen, click the “Add Driver / Vehicle” button.

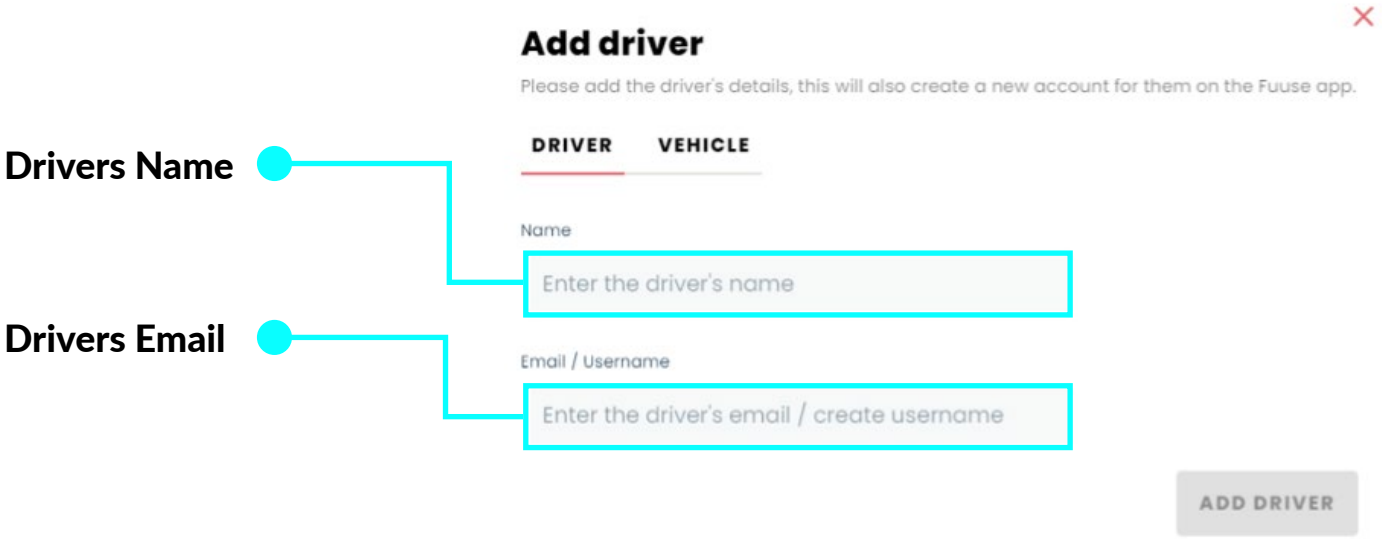


3. Add Driver.

A small modal will open with two tabs that allow you to enter your driver and vehicle information.

On the "**Driver**" tab (open by default), you can enter the full name of your new driver in the box provided under "**Name**".

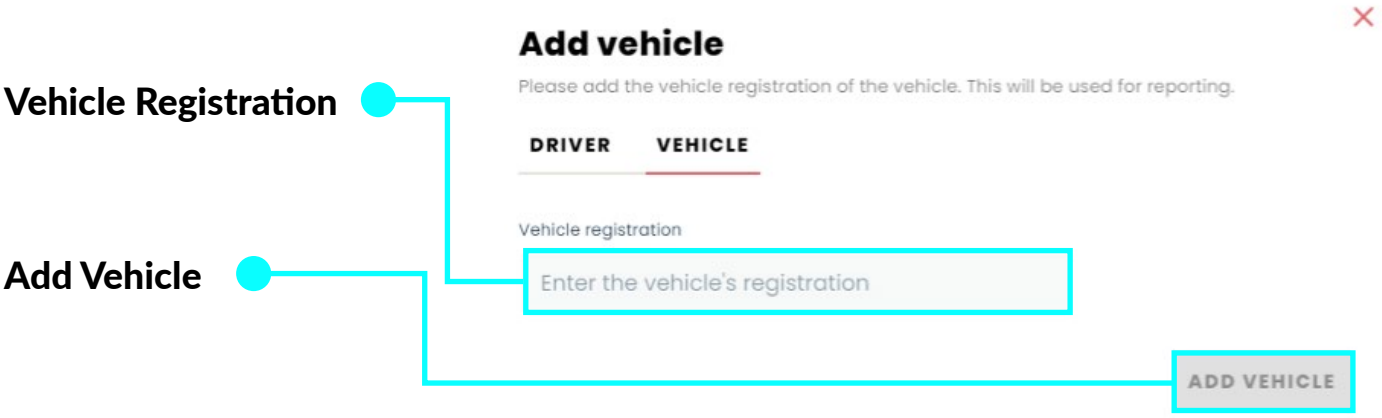
Enter the drivers email address under "**Email / Username**". This will also serve as the drivers username when logging in to the account.



4. Add Vehicle.

Switching to the vehicle tab allows you to add a vehicle by inputting it's registration number in the box provided. This step is optional and is only used for reporting purposes.

Once you have finished adding the details of your driver / vehicle, click the "**Add Vehicle**" button to save your choices.

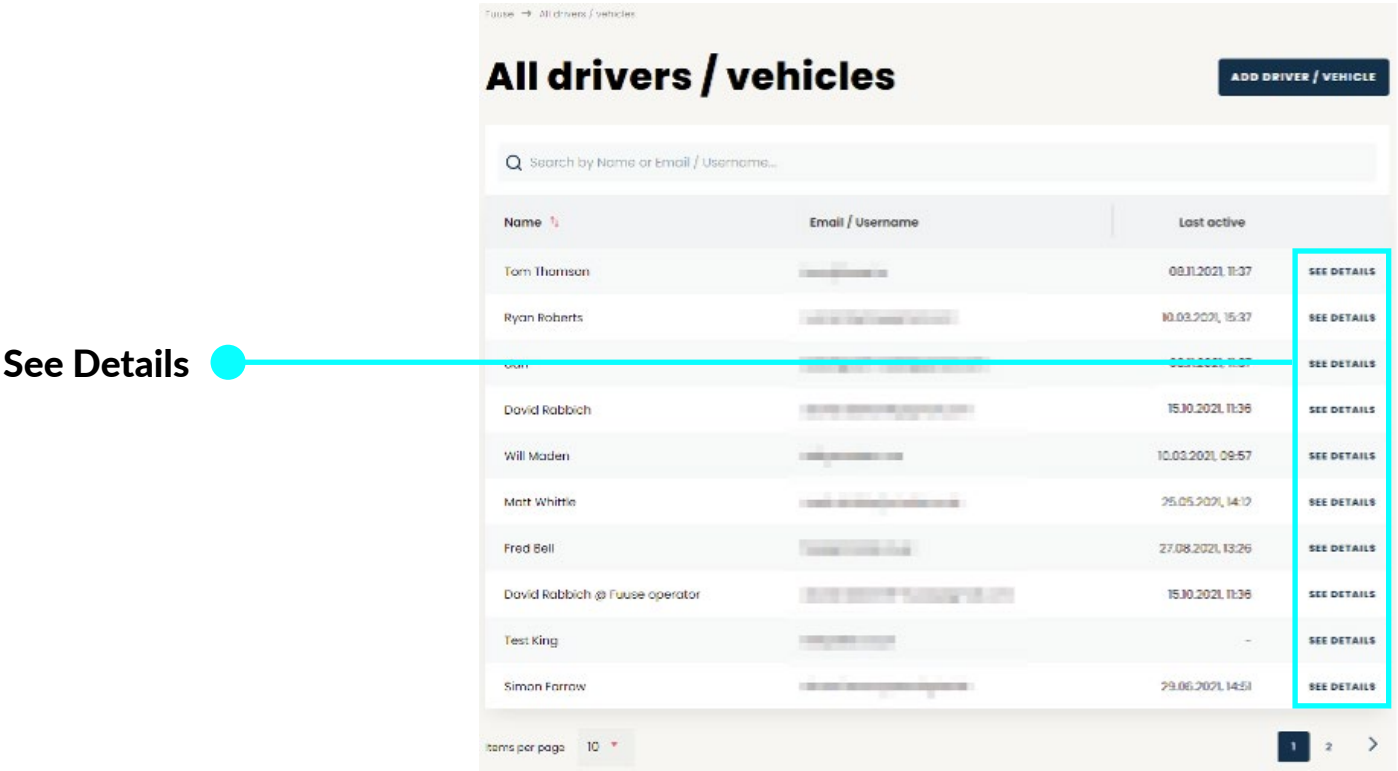


5. Driver List.

After saving your new driver, you will be returned to the driver / vehicle list. All drivers previously created will be displayed here in a paginated view along with your new addition.

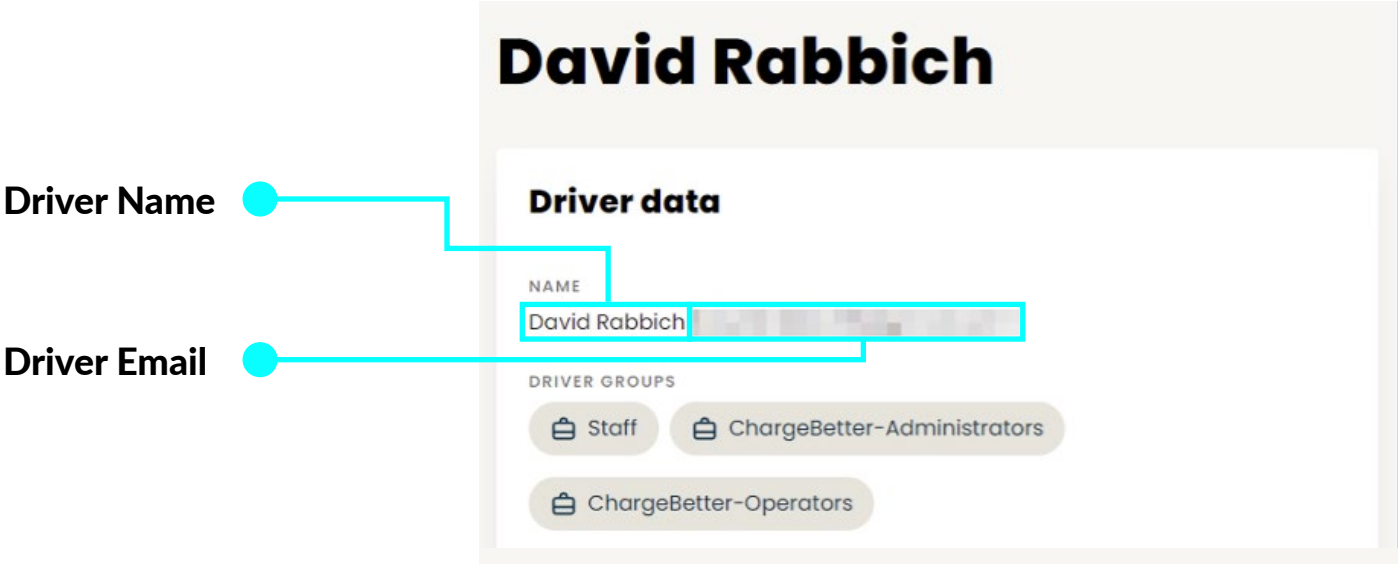
If you have a large amount of drivers and wish to find a specific one, use the search bar at the top of the list. Part or all of a drivers name or email address can be searched for.

To see more details about a specific driver, click the "**See Details**" button next to the driver in question.



6. Driver Details.

The driver details screen is split into two sections. The first part displays the drivers name, their email address (pixelated in the example below) and any driver groups they have been assigned to.

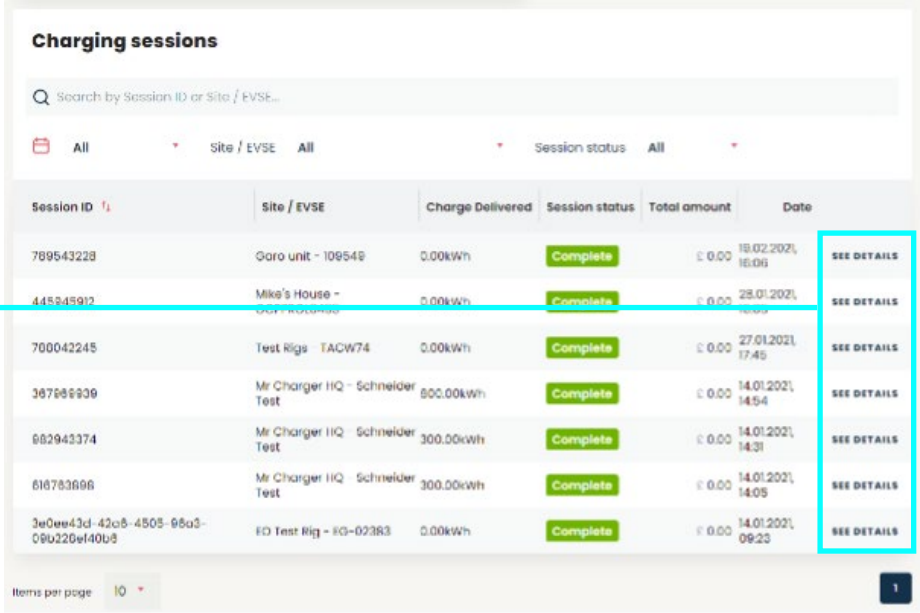


The second section gives a breakdown of the drivers past charging sessions. This is exactly like the charging log section, but the information is specific to this one driver.

The search bar at the top allows you to find specific sessions if needed by searching information such as the session ID, the site or EVSE name etc.

Click the "**See Details**" button to drill into more specific data and functionality about that particular charging session.

See Details



7. Session Details.

The session details screen dives deeper into the in's and out's of that particular charging session.

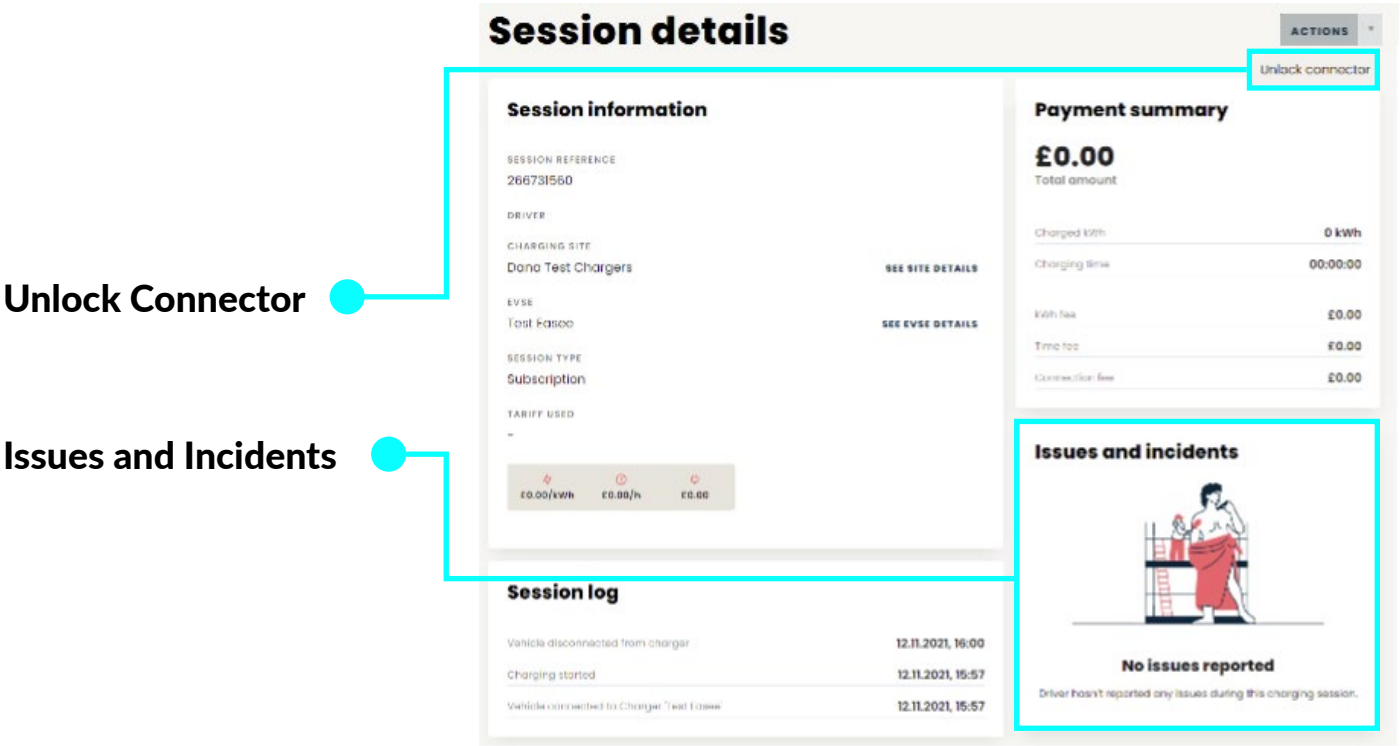
Information available here includes:

- Session type
- Tariff used
- kWh fee
- Time fee
- Connection fee
- Vehicle connection time
- Charge start time
- Vehicle disconnection time

You will find some generic information, such as total amount cost and the drivers details which was also displayed in previous sections.

If the driver has reported and logged any issues relating to this charge session, they will be displayed in the bottom right in the "**Issues and incidents**" section.

Additionally, clicking the "**Actions**" button will present the "**Unlock connector**" function. This can be used to manually release the connector if a charger fails to automatically release after a session has ended.


Unlock Connector
Issues and Incidents
Session details
ACTIONS
Unlock connector
Session information
SESSION REFERENCE
266731560
DRIVER
CHARGING SITE
Dona Test Chargers
SEE SITE DETAILS
EVSE
Test Easee
SEE EVSE DETAILS
SESSION TYPE
Subscription
TARIFF USED
£0.00/kWh
£0.00/h
£0.00
Payment summary
£0.00
Total amount
Charged kWh
0 kWh
Charging time
00:00:00
kWh fee
£0.00
Time fee
£0.00
Connection fee
£0.00
Issues and incidents
No issues reported
Driver hasn't reported any issues during this charging session.
Session log
Vehicle disconnected from charger
12.11.2021, 16:00
Charging started
12.11.2021, 15:57
Vehicle connected to Charger 'Test Easee'
12.11.2021, 15:57

Creating Groups of Drivers.

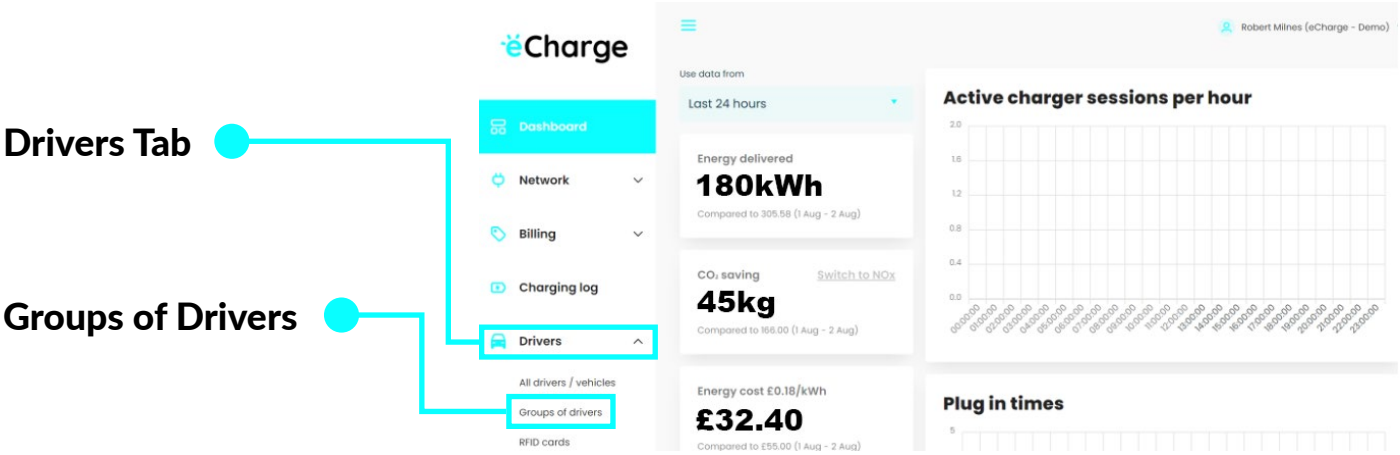
This guide will cover how to create groups of drivers using the ECharge web portal. Groups can be used to organise users allowing you to easily apply user access control profiles to them.

Contents:

1. Drivers Section.

To get started, click the arrow beside "**Drivers**" from the navigation menu to open up that section.

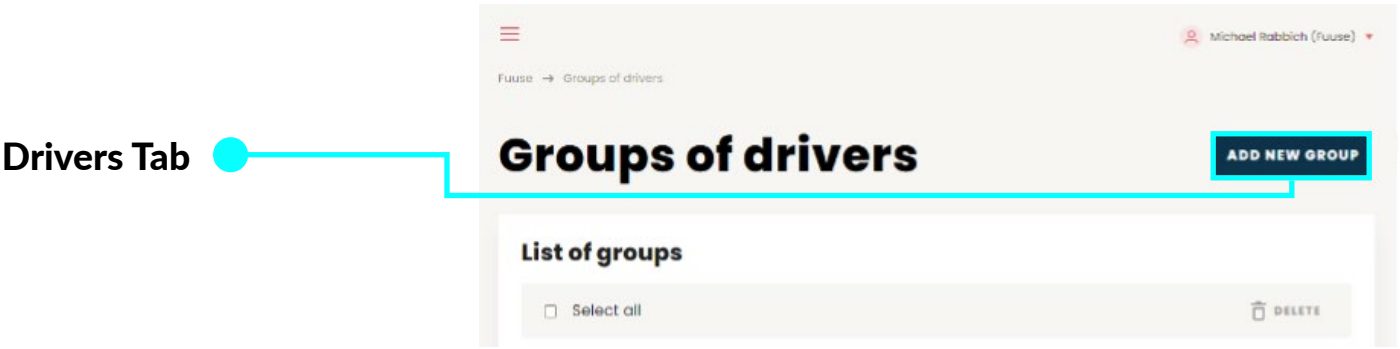
Click "**Groups of drivers**" from the expanded menu



2. Groups of Drivers.

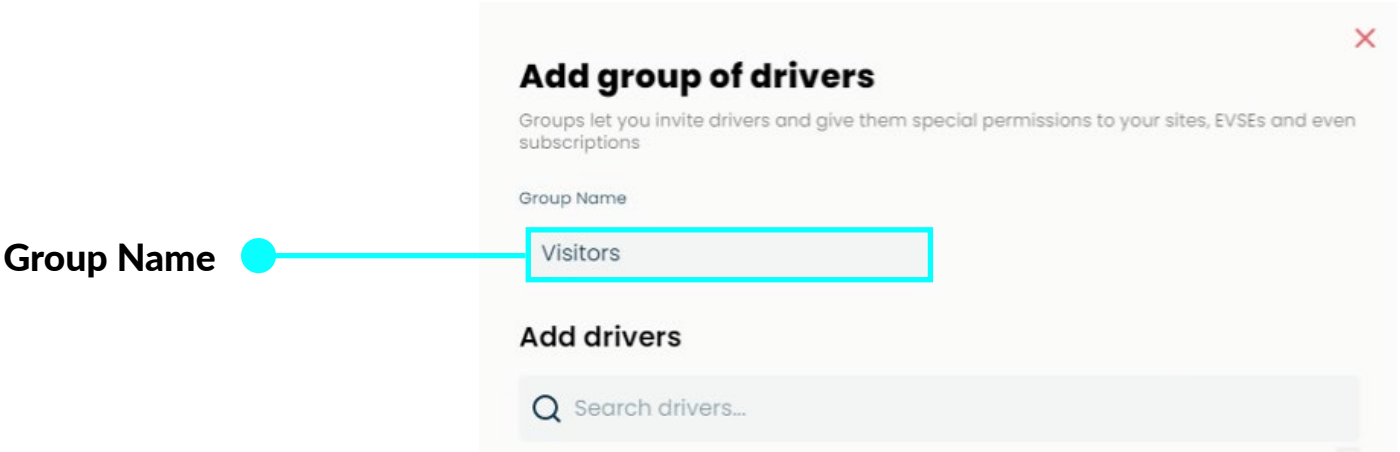
Any previously created groups will display in the list below.

Click the "**Add New Group**" button.



3. Name Your Group.

In the text box below "**Group Name**", enter a descriptive and memorable name for this group of drivers that will distinguish it from any others you might have.

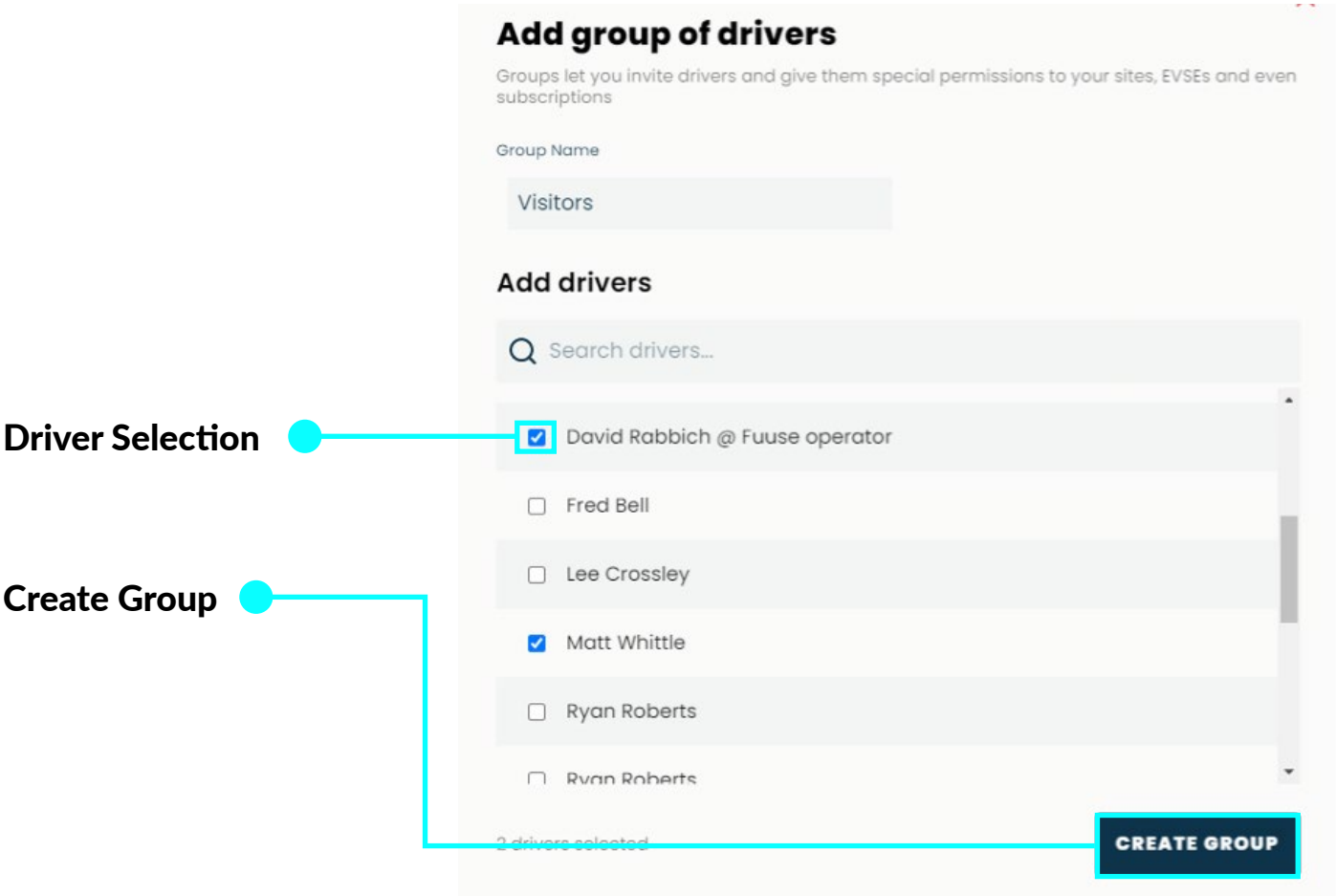


4. Add Drivers.

A list of all of your drivers will be shown. Check the box next to each driver you want to include in the group.

If you have a large number of drivers on your system, use the search box provided to find specific people.

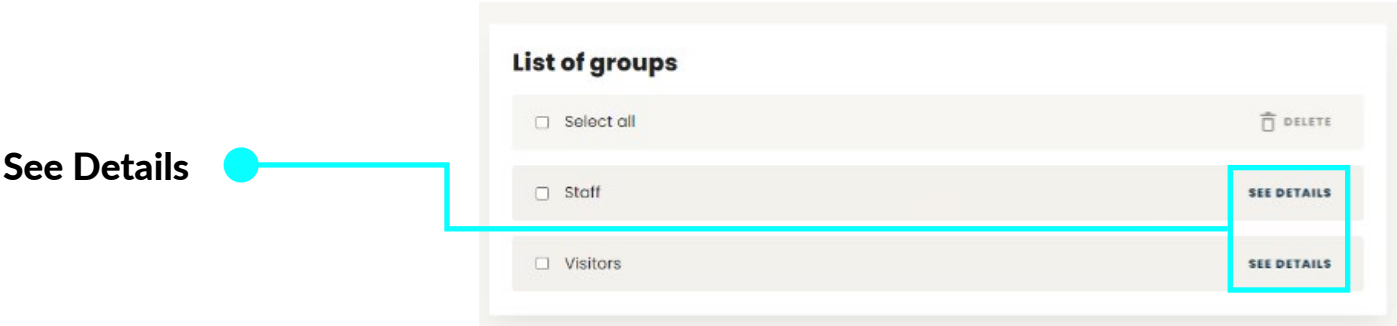
When you have all of your drivers selected, click the "**Create Group**" button.



5. View New Drivers Groups.

Your new driver group will now display in the list with any previously created groups.

If you wish to view or edit a group, click the "**See Details**" button.

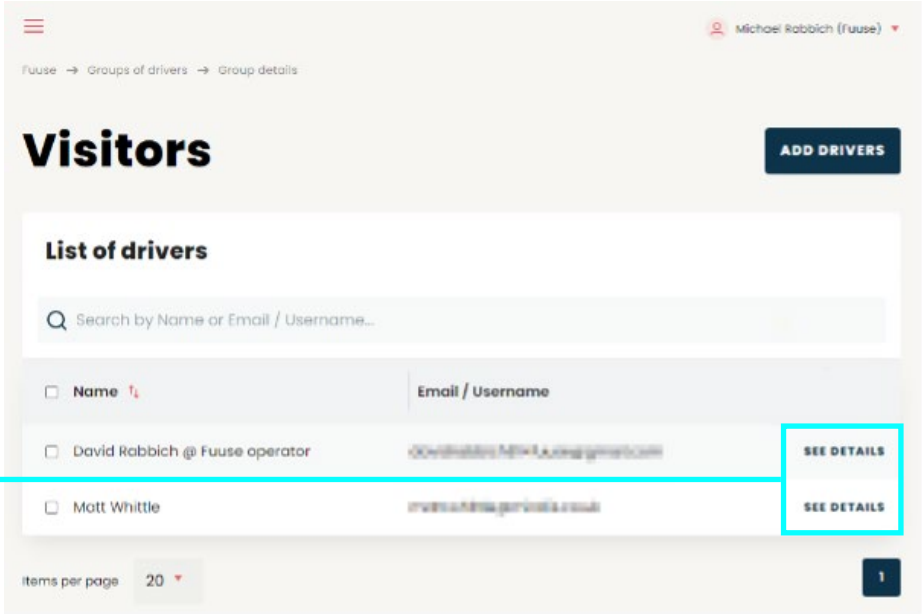


6. Editing a Group.

Here you can see all the drivers currently in this group. Clicking the "**See Details**" button next to the drivers name will take you to the details of that particular driver.

You can add more drivers by clicking the "**Add Drivers**" button at the top and repeating the steps above.

See Details



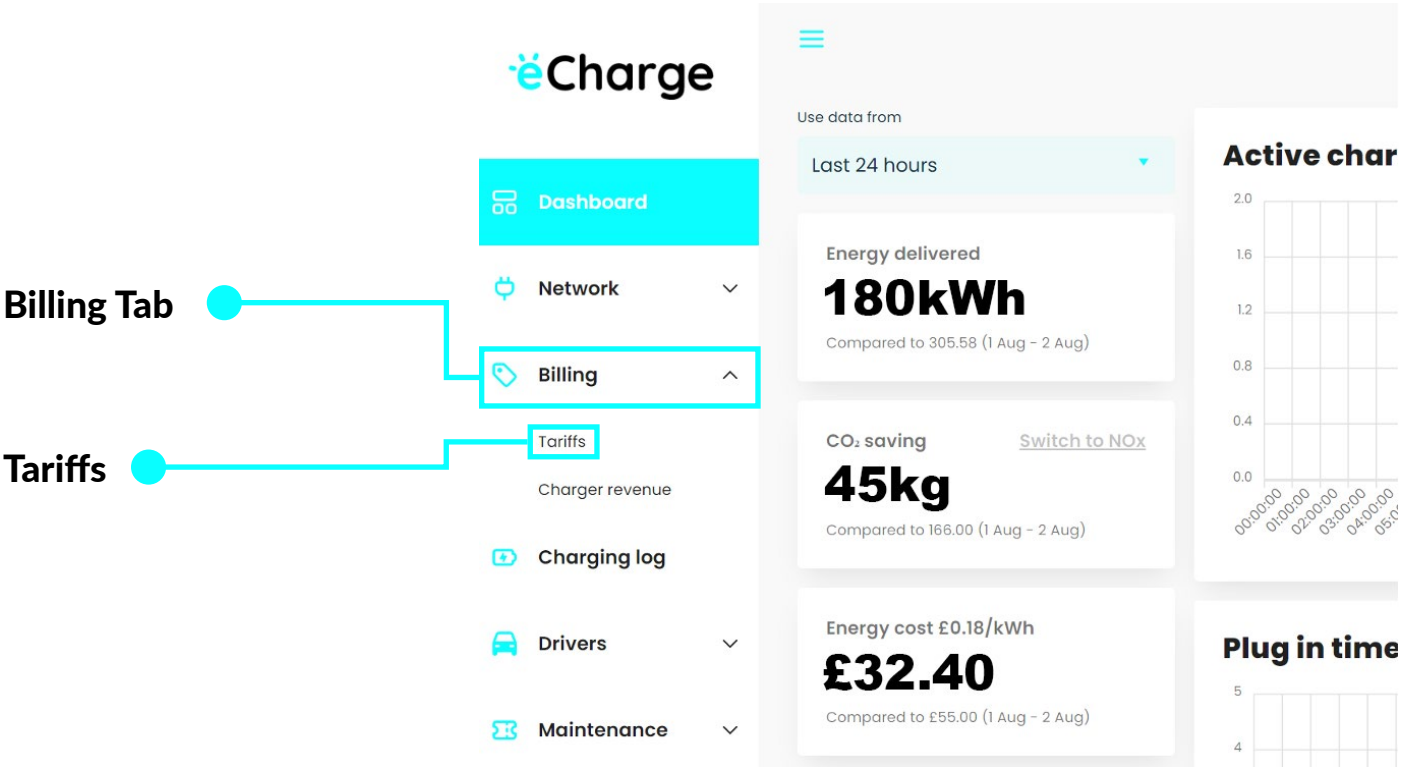
Creating and Editing Tariffs.

This guide will cover creating, viewing and editing tariffs in the ECharge web portal. Tariffs can be applied to your charging sites via an access control profile and will apply to all drivers and chargers listed in that profile.

Contents:

1. Billing Tab.

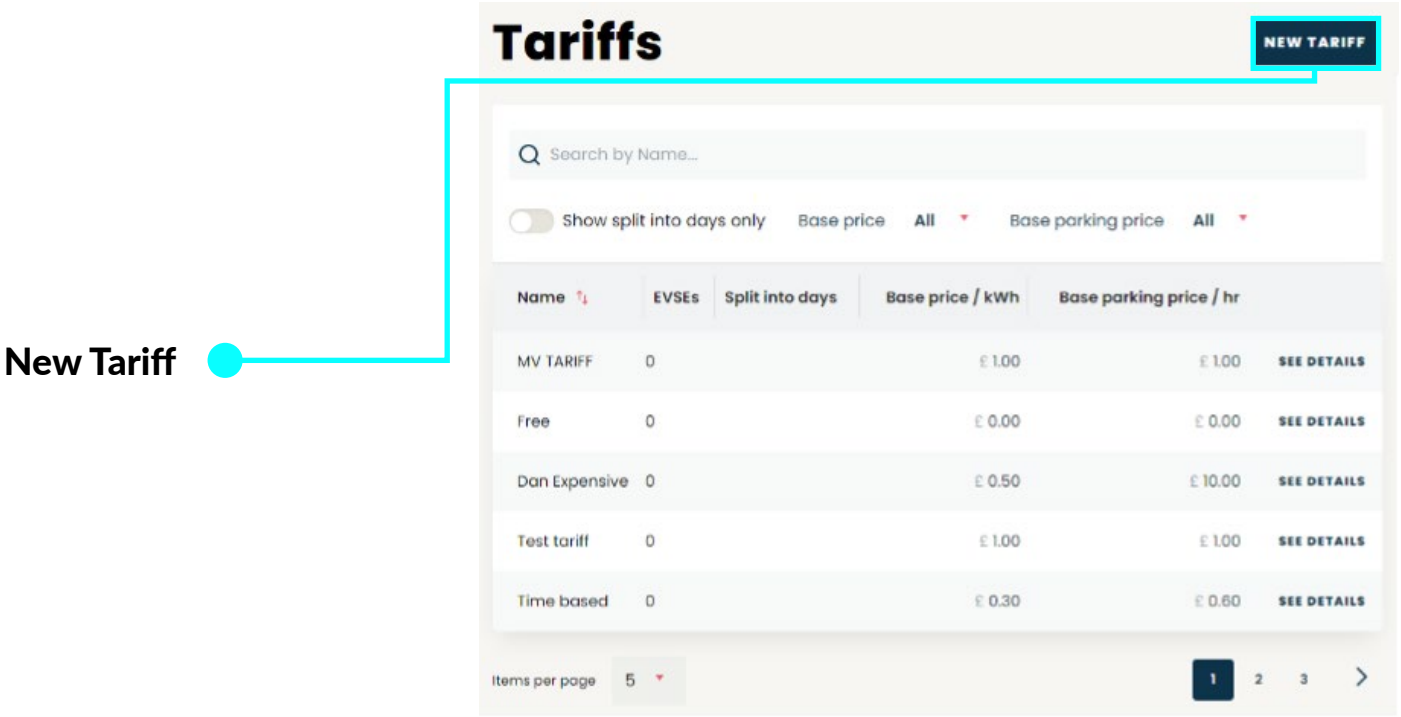
From the **Billing tab** in the navigation menu on the left of the screen, click either "**Billing**" itself or use the arrow to open that section and click Tariffs.



2. Tariffs Screen.

This is the tariffs home screen. All previously configured tariffs will be shown in a list here. We will look at this in more detail at the end of the guide.

To create a new tariff, click the **New Tariff** button in the top right.



3. Creating a New Tariff.

Here we can build up all the information needed for your new tariff.

Tariff Name

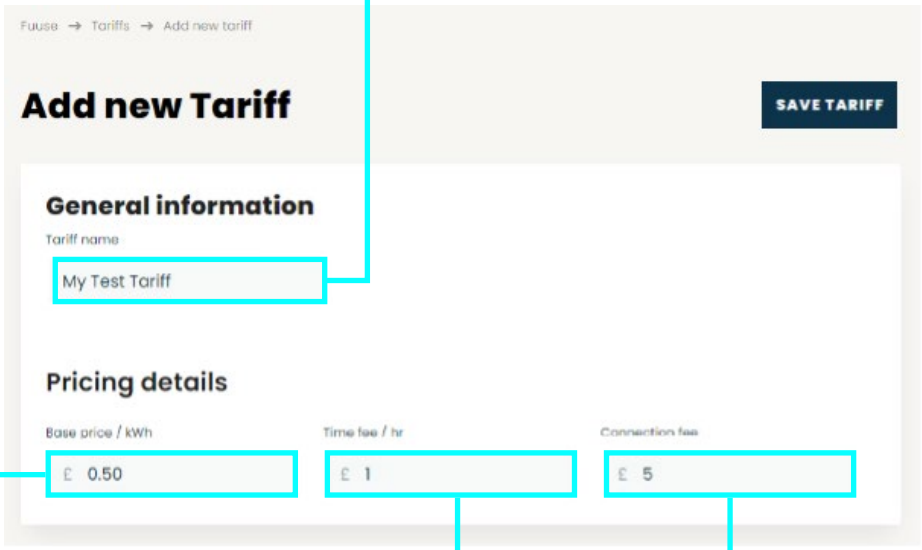
Give your tariff a unique name. This is important, even if you only have a handful of tariffs in use, to ensure you select the correct one when creating your access control profile.

Base price / kWh

The price the user will pay for every kilowatt-hour (kWh) used per charge session. This can be any value you require, including zero.

Time Fee / hr

This represents how much the user should pay for their time actively charging per hour. Again, This can be any value you require, including zero.



Connection free

A one-time fee charged on a per session basis for connecting to the charger. Like the other pricing options, this can be any value and is not mandatory, so it can be set to zero.

Save Tariff

With all of your tariff options set as you require, click the **Save Tariff button** to confirm your choices.

4. Tariff Preview & Edit.

Edit Tariff

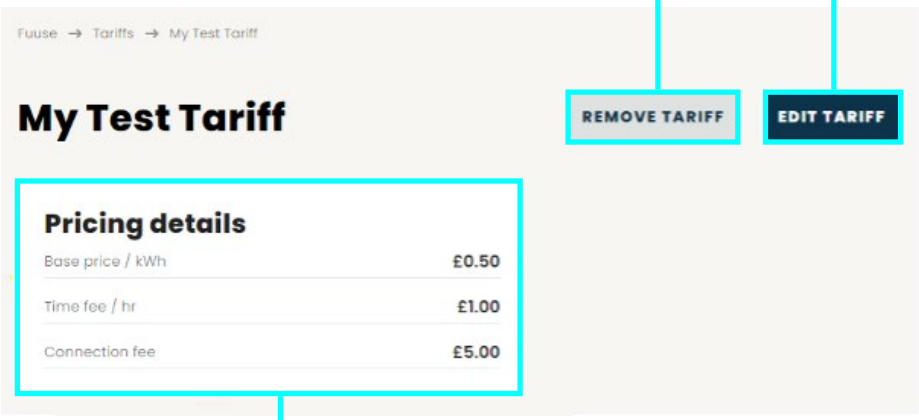
Change details about your tariff by clicking the Edit Tariff button. This will take you back to the previous screen where you created the tariff, allowing you to change any aspect of it.

Remove Tariff

If you ever need to delete a tariff, this can be done by clicking the remove tariff. This will remove it from any and all access control profiles.

Pricing Details

Quickly preview the financial breakdown of your selected tariff in the pricing details section.



5. Return to the Tariffs Home Screen.

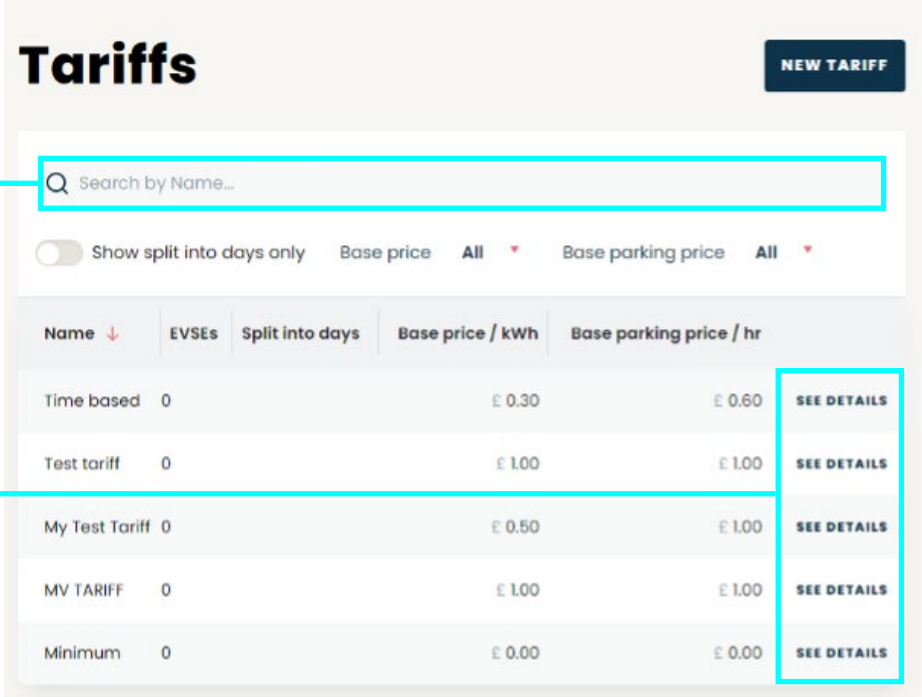
When you return to the tariffs home screen, you can view your new tariff in a list with all previously created ones.

Search Bar

Use the search bar if you have a lot of tariffs and need to find a specific one.

See Details

Click the "**See Details**" button next to a tariff to be taken to the tariff preview screen, as shown in step. A tariff can be edited and deleted from there if required.



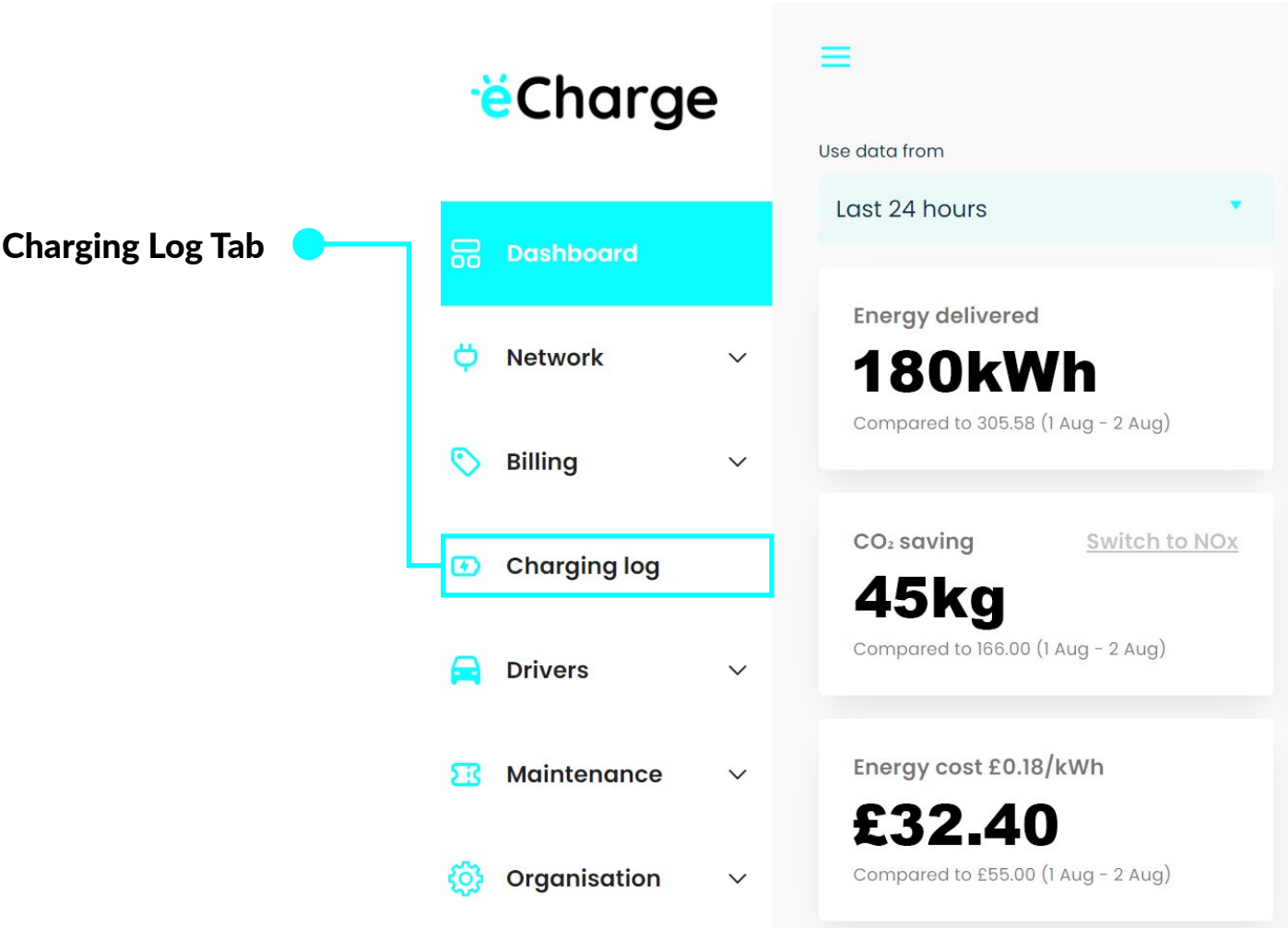
Charging Log and Session Details.

The charging log and session details screen offer detailed breakdowns of your site's charge history, past and present. This information can be used to help troubleshoot and diagnose various issues that can crop up when charging an EV.

Contents:

1. Charging Log Tab.

From your dashboard in the ECharge web portal, click the "**Charging Log**" tab from the side menu on the left.



2. Charging Log Screen.

The charging log screen offers a brief summary of all past charge session as well as any current ongoing ones.

Search Bar: Use the search bar provided if you want to find a specific charge session quickly and you have some details to remember it by. Information such as the date, the driver or the vehicle can be searched on.

Filters: Drop down filters control what can be seen in the list. Use these to narrow down a search where you might not know enough specifics to use the search bar. Filter options include:

- Last 7 / 30 / 60 days or All
- Site Name
- EVSE Name
- Session status: All or Complete

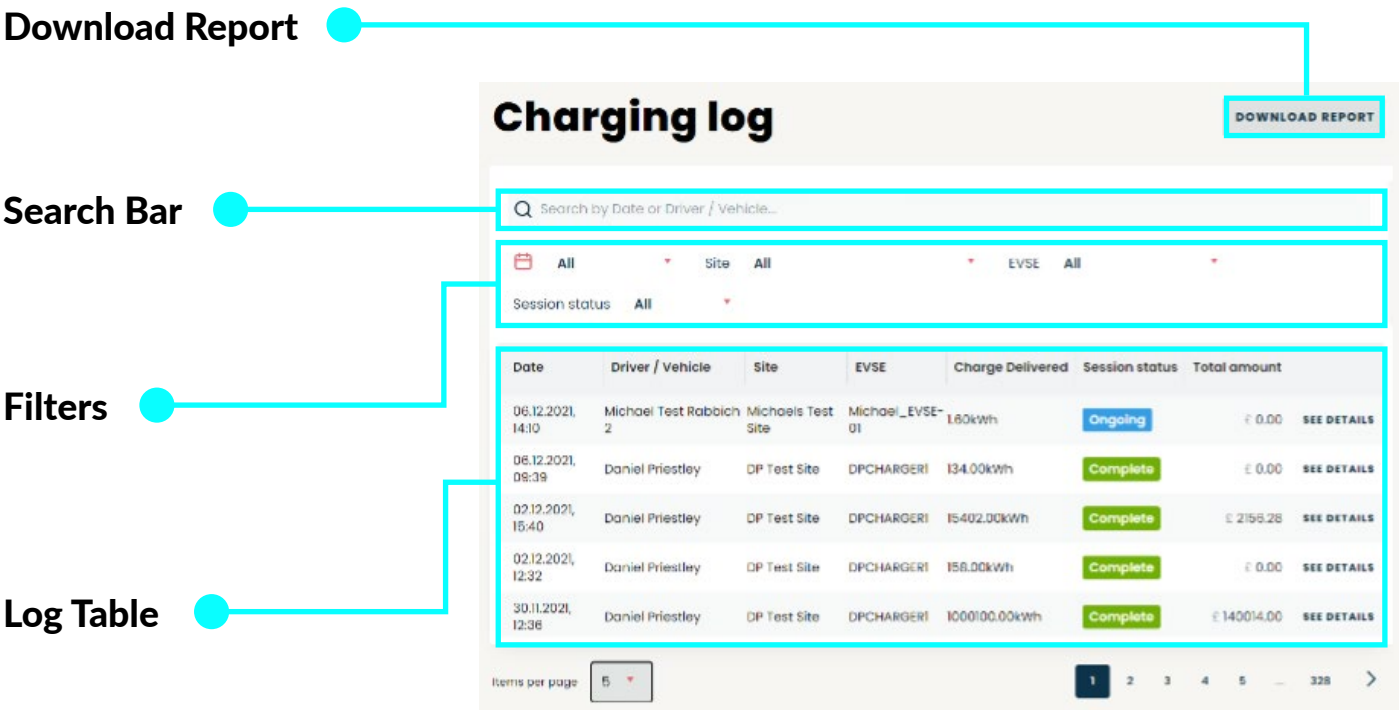
Log Table: This shows a summary of the charging information for all sessions based on your filter and search preferences. All will be shown by default, with the most recent session at the top.

Most of the information here is self-explanatory and can be used to paint a generalised picture of the state of your active charge sites.

The session status field will display either “Ongoing” for a current charging session, or “Complete” for one that has finished.

Download Report: You can download your entire charging log as a CSV file by clicking the “Download Report” button.

See Details: To view the details of any of the charge sessions in your log, click the “See Details” button next to the session you are interested in.



3. Session Details Screen.

The information on the session details screen can be broken down into sections, making it easy to find the information relevant to your issue.

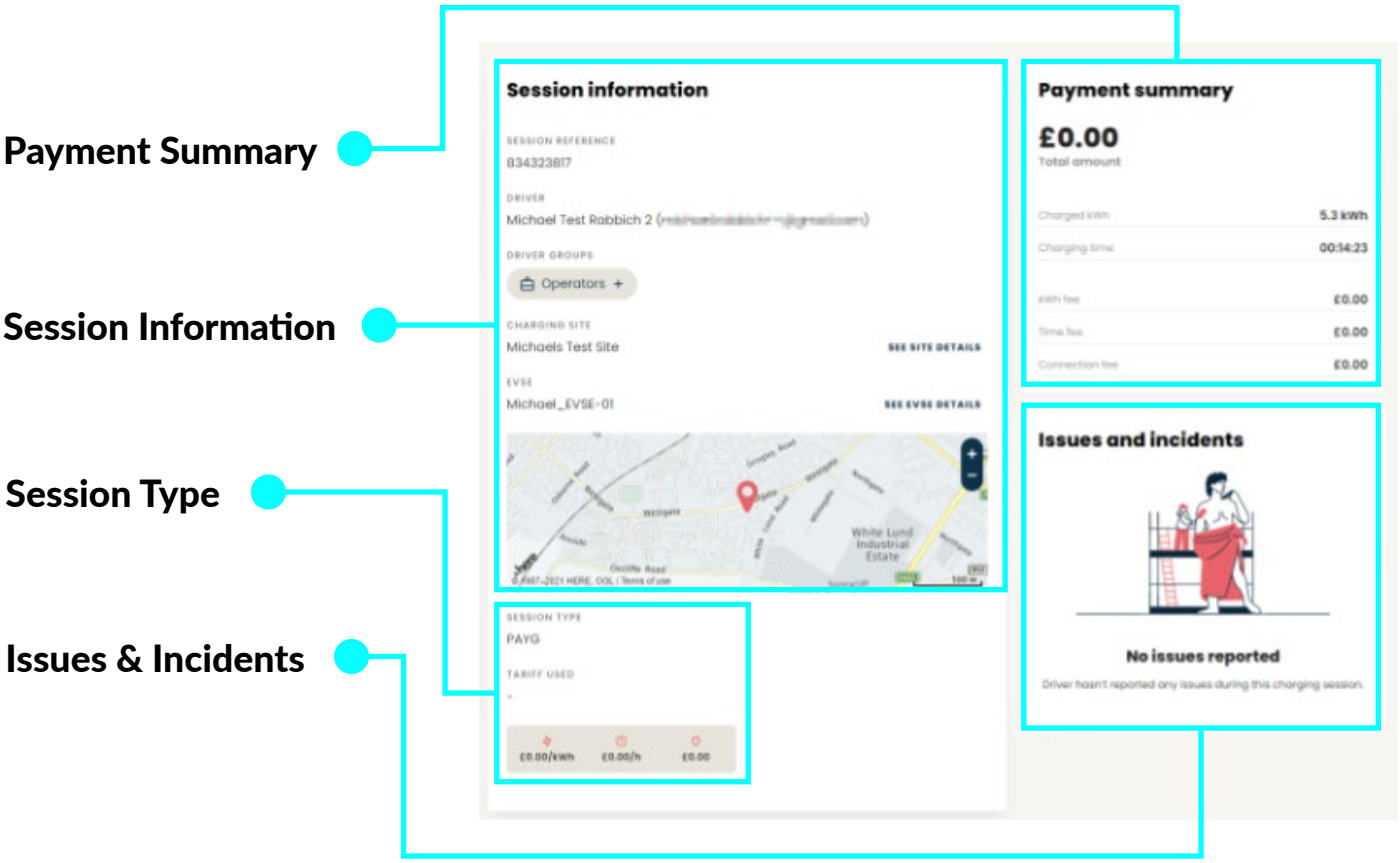
Session Information: Here you will find the most basic and fundamental information pertaining to this charging session:

- A session reference number which can be noted if trying to keep track of a specific problematic session.
- The driver's name and email address, so you know exactly who this information pertains to.
- Any driver groups this particular driver is part of.
- The name of the site and EVSE for the session, along with links to see more details about either of them.
- An interactive map that plots the location of the changing site for this session.

Session Type & Tariff: The session type is displayed here, which is currently just pay as you go (PAYG), but more may be added in the future. You will also find details of any tariff being applied to the session. For more specific information on tariffs and how they are applied, see Creating & Editing Tariffs

Payment Summary: This is a breakdown of the monetary side of the charging session, including the total amount, kWh fee, time fee and connection fee incurred as defined by the applied tariff. You can also find some basic information about how much the vehicle has been charged in kWh and the charge duration.

Issues & Incidents: This section is still under construction, so it currently won't display any information. However, in the future this will display any issues raised by drivers for the EVSE being used for this session.

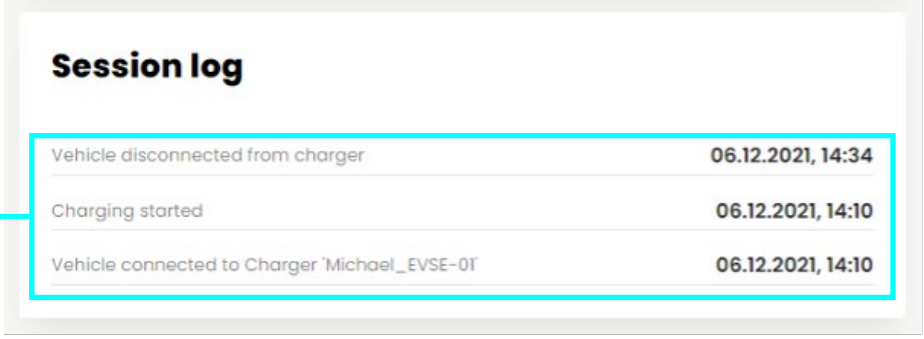


4. Session Log.

At the bottom of the session details screen you will find the session log. This populates time logged events that occurred during the active session.

This can be incredibly useful when diagnosing unexpected behaviour, so you can see exactly what happened and when.

Session Information



5. Remotely End Session / Unlock Connector.

The session details screen isn't just for informational purposes. It also contains some useful functions for remotely interfacing with the EVSE in the event of something going wrong.

In the top right corner you will find the **Actions tab**. Clicking this will present you with 1 or 2 options depending on the current status of your session:

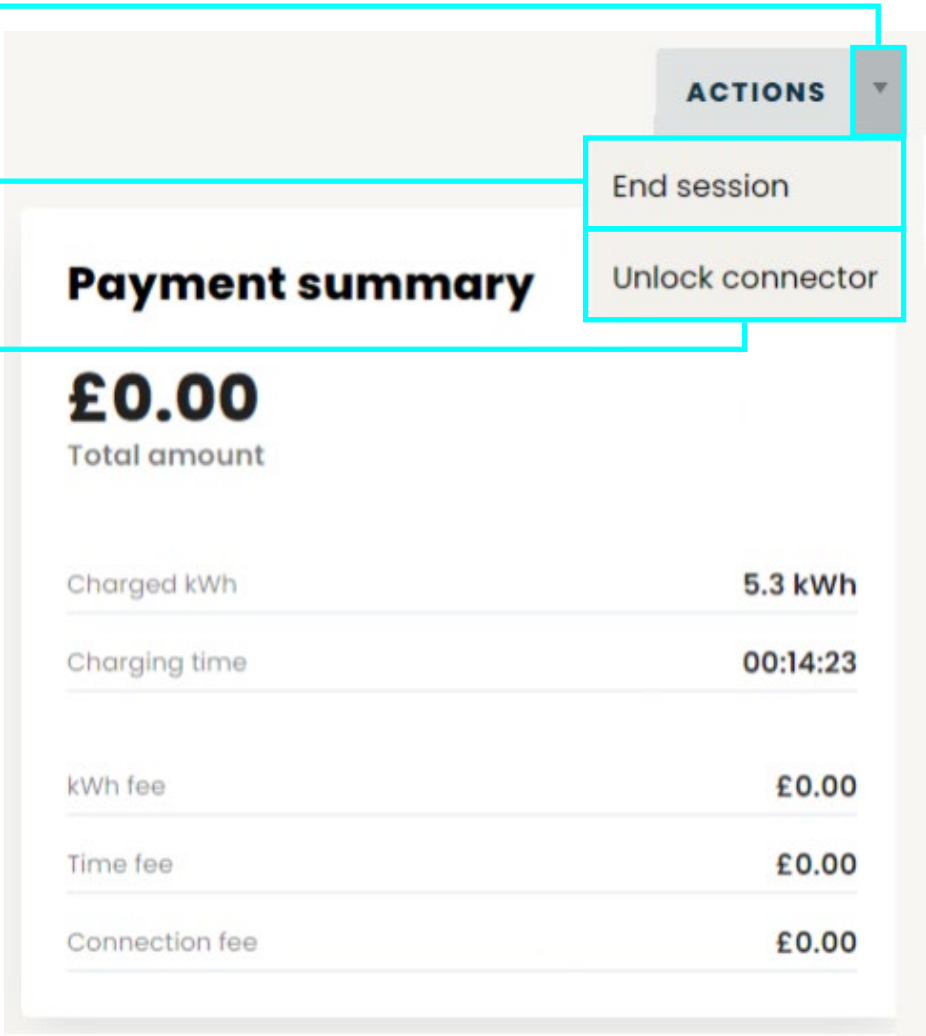
Actions Tab

End Session

This allows you to remotely end the charge session, useful if something is preventing you from ending the session at the EVSE or if you are an operator and want to end the session of one of your drivers or customers. This option will only be present if the session is ongoing.

Unlock Connector

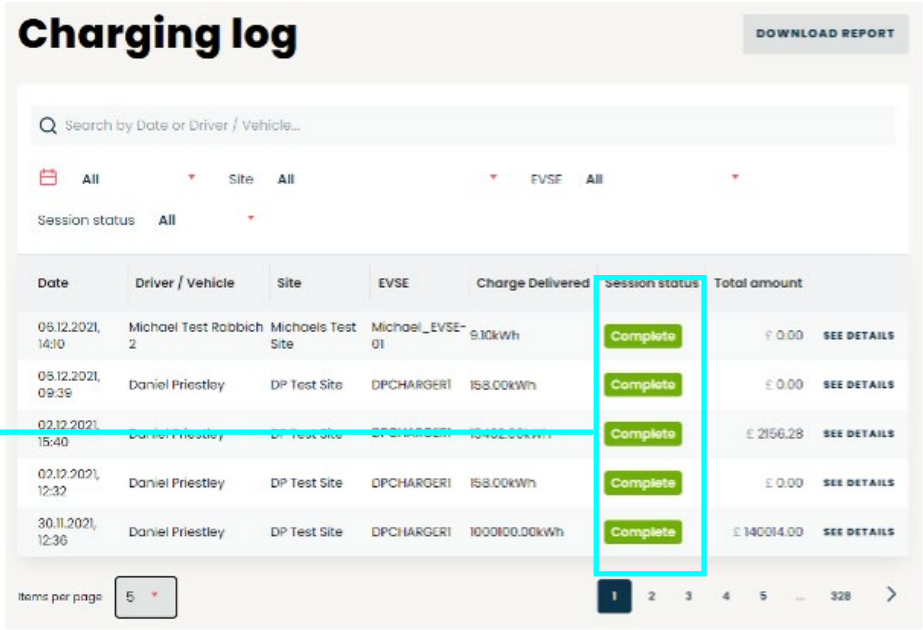
If for some reason the connector failed to unlock upon ending a charge session, you can attempt to unlock it remotely here.



6. Session Complete.

Once your charge session is complete, the status on the charging log will update to reflect this.

Session Status



eCharge

echarge.io