

# **Retrotec's rCloud Portal**

User Guide

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## Overview

The Retrotec Portal provides customers with online access to their official Retrotec calibration certificates. Users do not need to register or login to access this service.

The Retrotec Portal is also a fully featured website that augments the Retrotec rCloud mobile app that is available in the Apple, Android and Windows App stores. The Portal allows rCloud users to modify company, user, test location and test information that appear on the rCloud reports. The Portal contains an rCloud Test search feature that allows users to browse through all their own test reports or any other that colleagues have given them permission to view. Finally, users can manage their rCloud equipment by adding or removing fans, searching for a fan's flow equation parameters from Retrotec or, if necessary, entering in custom flow equation parameters.

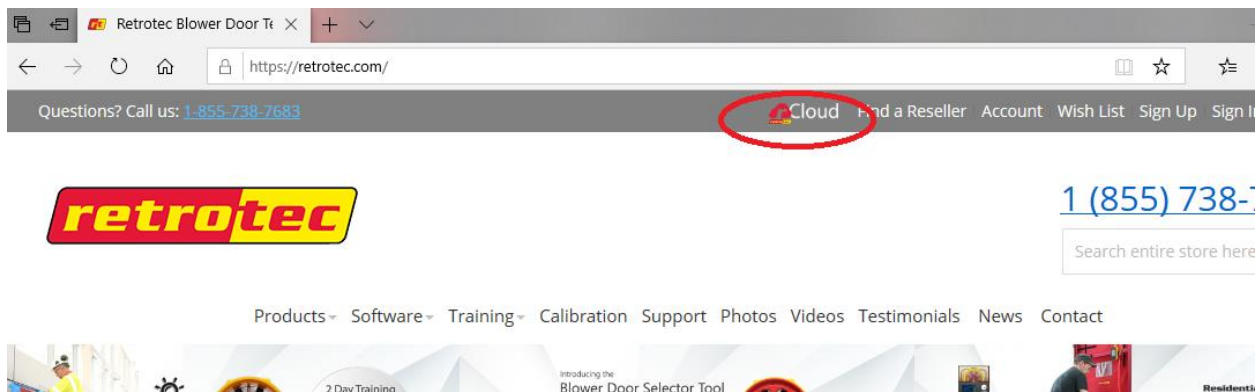
## Accessing the Portal

### From Web

The Portal can be accessed directly at the following address: <https://portal.retrotec.com>.

### From Retrotec.com

The Portal can also be accessed via the Retrotec home page (<https://retrotec.com>) by clicking the **rCloud** icon in the upper right-hand corner:

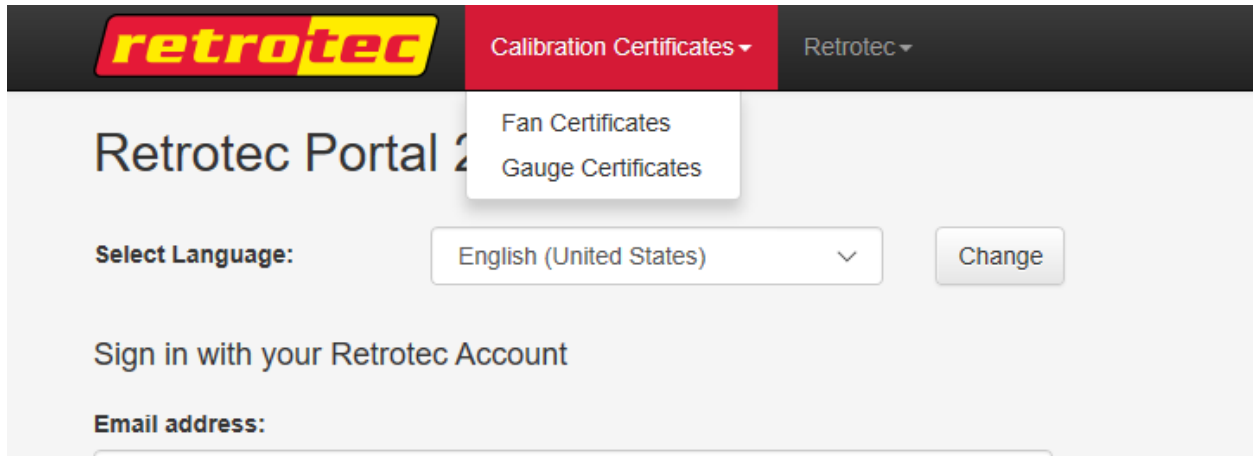


This takes the user to the rCloud Information page where there are two icons providing access to the Portal, one for **Existing Users** with logins, the other where **New Users** can register for login privileges.



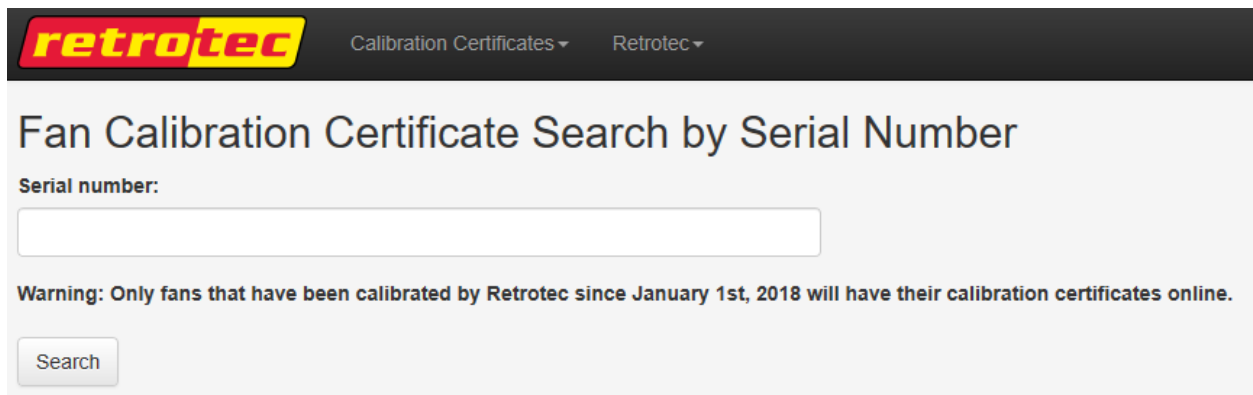
## Anonymous Access

Portal visitors do not need to login or be registered to access the below menu options.



### Fan Calibration Certificates

All fans that have been calibrated in the flow labs at Retrotec USA or Retrotec EU since January 1, 2018 are available online. Type the fan serial number into the search box and click **Search**.



If the calibration certificate is available, it will be displayed in a new tab in the web browser.

### Gauge Calibration Certificates

All pressure gauges that have been calibrated in the flow labs at Retrotec USA or Retrotec EU are available online. Type the gauge serial number into the search box and click **Search**.

## Gauge Calibration Certificate Search by Serial Number

Serial number:

If the calibration certificate is available, it will be displayed in a new tab in the web browser.

## Creating a Portal User and Company Accounts

Any person wanting to use the rCloud mobile app is required to create an account on the Portal. When a new Portal user is registered, both a user account record and a company account record are created. The user account record is all information that is unique to that individual. The company account record stores all the information that describes the company. The first user at a company to register on the portal is automatically marked as the owner of the new company. As the owner of the company, the user will be able to invite fellow coworkers to join the company and give them the ability to view company tests.

### Registering as a New Portal User

The Portal Registration Page can be accessed by: clicking the **Register as a new user** link on the Portal Login page, clicking the New Users icon on the rCloud information page on the Retrotec website or by typing the following link: <https://portal.retrotec.com/Register>.

Fill out the registration form, click the **I'm not a robot** reCAPTCHA checkbox and then press the **Register New User Account** button. If the registration was successful, an activation email will be sent to the email address specified in the **Email Address** field at the top of the registration page.

All information on the registration page can be modified from within the Portal once the user logs in.

### Differences with the Retrotec Company Website Account

It is important to note that the Retrotec Portal account is different from the account created on the Retrotec company website. The account credentials on the Retrotec company website will not work when trying to login to the Portal and the rCloud mobile app.

### Activate Portal Account

The email sent by the Portal after a successful registration should arrive very shortly in the user account's email inbox. If it does not arrive within a few minutes, please check the Spam, Junk or Clutters folders in your Email application.





Click the following link to activate your Retrotec account:

<https://portal.retrotec.com/Activate?ActivationToken=123ab456c7891d2efg345678912hijk&LanguageCode=en-US>

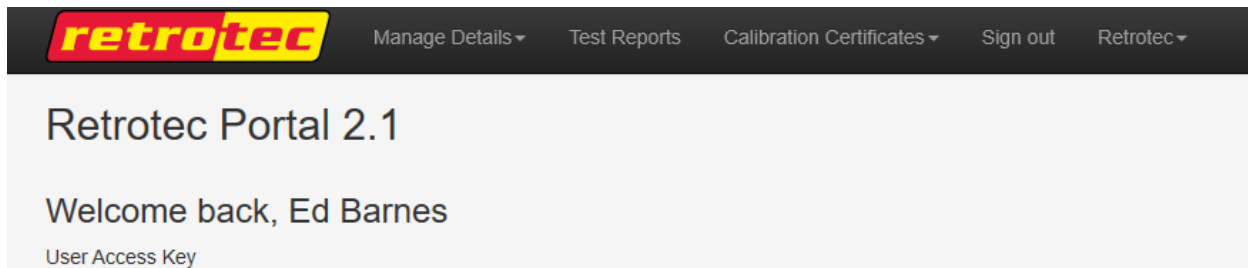
Thank-you for using rCloud.

Retrotec  
1060 East Pole Road

Click the link in the email and it will take you to the Portal Account Activation page. The account will be activated automatically. Click the **Go To Home Page** button to go to the Portal Login page. The new user will be able to log in to the Portal and to the rCloud mobile app.

## Logging in to the Portal

Once the user has logged in to the Portal, options on its menu bar will be expanded.



The user will also see the release notes for all the Retrotec testing software: the rCloud mobile app, FanTestic and FanTestic Integrity.

## Updating a Legacy User Account

All user accounts from the now deprecated <http://rcloud.retrotec.com> website have been carried over to the new Portal website. On the old site the user could choose whether or not to “activate rCloud”. The new Portal automatically activates all new user accounts for rCloud. All legacy accounts that never made the “activate rCloud” choice will not have the Test Reports menu option, nor will they be able to log in to the rCloud mobile app.

## Retrotec Portal 2.1

Welcome back, Ed Barnes

To activate rCloud:

1. Select the **Manage Details** menu item.
2. Select **Manage User Account Details**.
3. Check the **rCloud Account** checkbox.
4. Click the **Save User Account** Information button.

<b>rCloud account?:</b>	<input checked="" type="checkbox"/>	<b>City:</b>
		Everson

Once the user account has been saved, the account will be activated for rCloud and **Test Reports** will now be visible in the portal menu bar.

### Forgot Password

In the event the user has forgotten their password to their user account, there is a link on the Login page that will guide the user through the password reset process.

## Managing Company Account Details

In the **Manage Details** menu, there is a **Manage Company Details** option. It will only be visible to user accounts that are marked as a company Owner or Accounts Manager.

### Changing Company Details

The **Manage Company Details** page allows the user to alter all details that describes the company. Clicking the **Save Company Information** button will immediately update the Portal database with all changes.

The company name appears on all rCloud reports. Any changes to the company name will not only be reflected in all future test reports, but in all past ones as well.

### Managing Users and Viewers

An **Invited User** gets an account that shares the same company record. A **Viewer** is a user in a different company that has been given privileges to view your company's rCloud reports. In other words, it is a way to share rCloud test reports with any colleagues you choose that are also registered in the Portal.

### Adding Users to The Company

If the new user goes through the full registration process outlined above in [Registering as a New Portal User](#), the new user account will be attached to a new company account, not the one that you created for your company. This holds true **even if** the new user enters a company name and company details that precisely match yours. If you want that new user to join **your** company, use the following steps:

1. On the **Manage Company Details** page, Click the **Manage Users And Viewers** button
2. In the **Invite Users To Join Company** section, fill in the **First name**, **Last name** and **Email address** textboxes.
3. Click the **Invite New User** button.
4. The new user will receive an activation email.
5. The new user clicks the link in the email to activate the new viewing account record.

## Invite Users To Join Company

First name:	<input type="text"/>	Email address:	<input type="text"/>
Last name:	<input type="text"/>	Confirm E-mail Address:	<input type="text"/>
<input type="button" value="Invite New User"/>			

## User Roles

Once the new user has activated their account, a company role can be assigned to the user. There are currently four company roles defined in the Portal:

1. **Owner** – Owners have full privileges to see the rCloud test reports of all company users. Owners can set the company roles for all company users. Every company account requires at least one Owner.
2. **Account Manager** – This is an optional role that an Owner can assign to any company user. Account Managers have almost all the same privileges as Owners with one exception - they cannot promote anyone to, nor demote anyone from, the Owner role.
3. **Employee** – Employees cannot Manage Company Details and can view only **their own** rCloud test reports. This is the default role given to all the company's users when they first receive their invitation.
4. **Employee (View All Tests)** – This is an optional role that will allow an employee to view **all** the company account's test reports in rCloud.

To change the role of any company user, click the **Change** button in the **Company Users** listing on the **Manage Users And Viewers** page.

Ed Barnes	Employee	<input type="button" value="Change"/>	Yes
Ed Barnes	Employee (View All Tests)	<input type="button" value="Change"/>	Yes
Ed Barnes	Owner	<input type="button" value="Change"/>	Yes
Ed Barnes	Account Manager	<input type="button" value="Change"/>	Yes

The **Change User Role With Company** page is displayed. Select the new role for the company user by checking the appropriate checkbox. By default the **Owner** and **Account Manager** roles can view all company rCloud reports, so do not need to click the **Can View All Company Tests**. Click **Save User Role** to update the company user with their new role.

# Change User Role With Company

Owner:

Account Manager:

Can View All Company Tests:

Save User Role

Manage Users and Licensing

## Removing Users

Removing a user from a company is straightforward. In the **Company Users** listing simply click the **Remove** button. If the user account has not been activated, the invite is deleted from the system. If the user account has been activated, it is removed from the company and a separate new company is created for the user account. Any tests completed by the user will still be visible to all company employees that have the **Owner**, **Account Manager** or **Can View All Company Tests** roles.

## Adding Viewers

In order to be a viewer, the viewer must have a fully activated Portal account. In the **Invite Viewers To Join Company** textbox at the bottom of the **Manage Users And Viewers** page enter the email address of the Portal user you wish to invite, then click on **Invite Test Viewer** and the invited account will show up in the Company Viewer Invitations list. An email is sent to the invited user with a link in it to join the company's roster of test viewers.

Once the invited user clicks the link the user will move from the **Company Viewer Invitations** list to the **Company Test Viewers** list.

## Removing Viewers and Invitations

Removing users from the ***Invitations*** or ***Viewers*** lists is very straightforward. Simply click the ***Remove*** button beside the user record and the user will not be able to view your company account's rCloud test reports.

## Managing User Account Details

Under the **Manage Details** menu, there is a **Manage User Account Details** option. This page is visible to all users.

### Changing User Account Details

The **Manage User Account Details** page allows users to alter any or all of their details. Clicking the **Save User Account Information** button will immediately commit all changes to the Portal database.

The user name and email address appear on all rCloud reports. Any changes to the user account name and email address will be immediately reflected in all past and future test reports.

### Managing User Account Settings

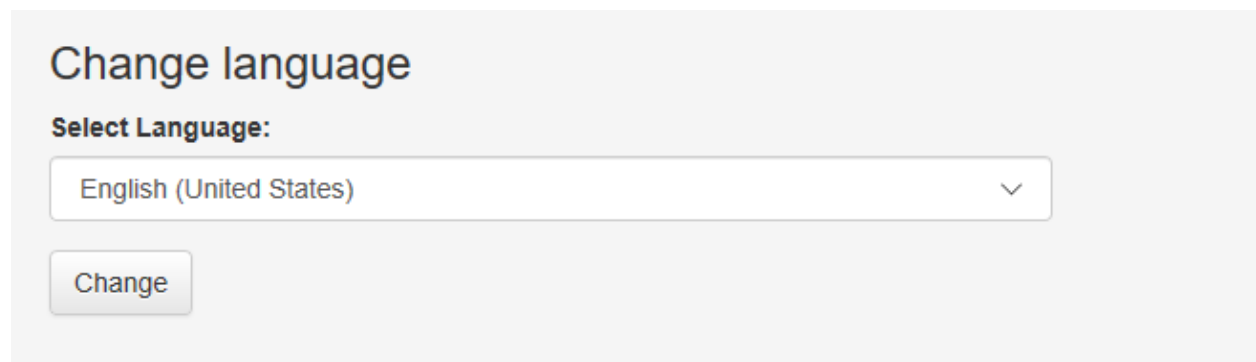
The rCloud mobile app settings are configurable both from within the mobile app and from the Portal. The user is free to choose whichever method is easiest for them. On the **Manage User Account Details** page, click the **Manage Account Settings** button.

### Change User Account Language

The rCloud mobile app language setting allows the user to select the language of the mobile app, the Portal and the rCloud test reports. While the app is fully configurable, not all the translations are in place as of this writing.

To change the language:

1. Select the language from the drop down.
2. Click the **Change** button.



The screenshot shows a user interface for changing the language. At the top, the heading "Change language" is displayed. Below it, the text "Select Language:" is followed by a dropdown menu. The dropdown menu is currently set to "English (United States)" and has a downward-pointing arrow on the right side. Below the dropdown menu is a button labeled "Change".

The Portal will update to the new language immediately. However, any open rCloud test reports will need to be refreshed in the browser to reflect these updates. In rCloud, a **Resync All** operation will need to be performed to download the new settings. It is recommended that this be done on a WIFI connection; it can be a very data intensive download depending on the number of tests the user account has done.

## Change User Account Units

The rCloud mobile app **Units** setting allows the user to select the standard of the units of measure that appear in the user's mobile app, Portal and rCloud reports. There are four options:

1. **Mixed (default)** – a mixture of Imperial and Metric units that is commonly used in North America.
2. **Imperial** – all units will be Imperial system.
3. **Metric** – all units will be Metric system.
4. **Custom** – the user can select which units to use for each type of measurement such as Flow Rate, Pressure, Temperature, Mass, Length, Area, etc.

To change the units:

1. Select the **Unit set** from the drop down.
2. Click the **Change** button.
3. If **Custom** is the chosen option, all relevant units of measure will be displayed.



## Change units

**Unit set to use:**

Custom ▼

Change

### Custom units

**Mass:**

kg ▼

**Length:**

ft ▼

**Area:**

ft<sup>2</sup> ▼

The Portal will update to the new units immediately. However, any open rCloud test reports will need to be refreshed in the browser to reflect these updates. In rCloud, a **Resync All** operation will need to be performed to download the new settings. It is recommended that this be done on a WIFI connection; it can be a very data intensive download depending on the number of tests the user account has done.

### [Resetting User Account Password](#)

The Manage User Account Details page has a button that will allow the user to change their password without having to go through the **Forgot Password** workflow. To reset the user account password:

1. Click the **Reset Password** button.
2. On the **Reset Password** page, enter in the new password in both text boxes.
3. Click the **Reset Password** button.

The password will change immediately for the rCloud mobile app and the Portal.

## HERS Rater Accreditation ID

The user can enter their HERS Rater ID on the ***Manage User Account Details*** page. A future enhancement will allow the user to have that information appear on the rCloud test report.

## Managing Account Equipment

Under the **Manage Details** menu, there is a **Manage Account Equipment** option. This page is visible to all users.

Currently in the rCloud mobile app and the Portal all equipment is linked to the User account, not the Company account. There is currently no way to share equipment with fellow users in the same company.

User account equipment is configurable both from the mobile app and from the Portal. The user is free to choose whichever method is easiest for them.

### Adding a Fan

To add a new fan:

1. Click the **Add New Fan** button on the Manage Account Equipment page.
2. On the **Create New Fan** form:
  - a. Select the Fan Model.
  - b. Assign the fan a name that is meaningful for you.
  - c. The user has the option of entering the fan serial number or checking the **No serial number** checkbox.
  - d. Click the **Save** button.

**Create New Fan**

**Select a Fan Model:**

350

**Name:**

My 350 Fan

**Serial number:**

3LF00000

**No serial number:**

Save Cancel

Entering the serial number has significant benefits. When the **Save** button is clicked the Portal (and the rCloud mobile app) will attempt to download the flow equation parameters that otherwise appear on Retrotec's calibration certificates for that serial number. The flow equation parameters of all fans that

have been calibrated at Retrotec calibration labs since January 1, 2018 are available online. If the user doesn't enter in a serial number, rCloud will only provide the factory default flow equation parameters.

Once the **New Fan** is saved, the user just needs to run the rCloud mobile app and that fan's data will download to the user's device.

## Editing an Existing Fan

On the **Manage Account Equipment** page, in the **Account Equipment** listing click the **Edit** button next to the fan that will be modified. Only the fan name will be modifiable. The fan model and serial number (if entered) will not be modifiable. Click the **Save** button to immediately commit the changes to the Portal database.

Once edits are saved, the user just needs to run the rCloud mobile app and the modified fan data will download to the user's device.

## Deleting an Existing Fan

On the **Manage Account Equipment** page, in the **Account Equipment** listing, click the **Delete** button next to the fan that will be deleted. The fan will be removed from the list. The deleted fan's information is not lost in the database; any completed rCloud test that used that fan will still display its information on its report. Should the user need to use the fan again, just add it via the **Add New Fan** workflow.

## Managing Flow Equation Parameters

Fan flow equation parameters are sometimes referred to as curve fits or custom fits. These are the values that are generated when the fan is precisely calibrated by Retrotec or another certified lab. They are generally listed on a calibration certificate that is returned with the fan after the calibration. The flow equation parameters that were used to calculate the results of an rCloud test are listed on the fan's rCloud test report.

As stated above, when the fan is saved, the Portal (and the rCloud mobile app) will attempt to download the flow equation parameters directly from Retrotec. If they are available to download it eliminates the need for the user to manually enter them. This will reduce the chance of error from manual entry.

By clicking the **Manage** button next to the fan, the user can decide what flow equation parameters will be used.

# Manage Flow Equation Parameters

Currently using: **Retrotec Calibrated Flow Parameters**

Certificate number: **201901230543-3LF00**

Parameters Created On: **2019-02-26 03:22:54**

View Current Calibration Certificate

Get from Retrotec

Reset to Factory Default

Enter Custom Parameters

Return to Account Equipment

## Get From Retrotec

By clicking the **Get from Retrotec** button, the Portal will check with the Retrotec website's calibration service for the latest flow equation parameters. This is particularly useful if the fan has just been returned from one of the Retrotec calibration labs. The user also has the option to view the fan's latest calibration certificate in PDF format.

## Entering Custom Parameters

In cases where the fan was calibrated by Retrotec prior to January 1<sup>st</sup>, 2018 or was calibrated at a different lab, the user can manually enter in all the custom parameters. By clicking the **Enter Custom Parameters** button, the user is taken to the **Custom Flow Equation Parameters** page. Note that it is far easier to enter custom parameters via the website than via the rCloud mobile app.

## Custom flow equation parameters

Certificate number:

201901230543-3LF00

Choose a Calibration Date:

7/23/2019



Select K values unit:

CFM



Change

Range: 102

N: 0.5835

K: 11.5707

K1: 0

K2: 0.4

K3: 0

K4: 1

MF: 100

## Restoring to Factory Defaults

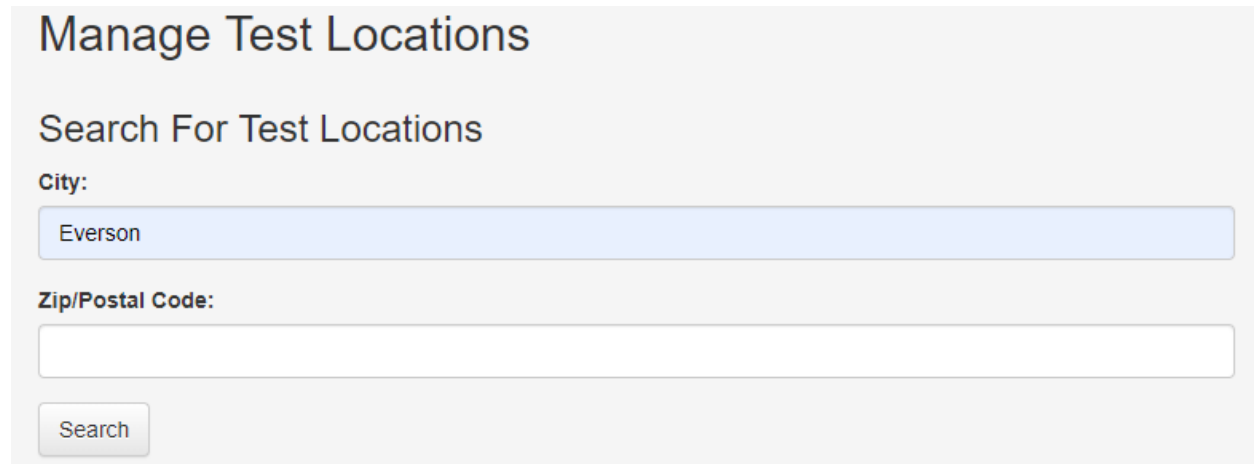
The user can reset the fan flow equation parameters back to the Retrotec factory defaults by clicking the **Reset To Factory Default** button.

## Updating rCloud

In rCloud, a **Resync All** operation will need to be performed to download the new fan flow equation parameters. It is recommended that this be done on a WIFI connection; it can be a very data intensive download depending on the number of tests the user account has done.


## Managing Test Location Details

The most recent enhancement to the Portal was adding the ability to modify some of the Test Location and Test Details data after the test is completed. Under the Manage Details menu, there is a **Manage Test Locations** option. To view your test locations, enter a **City** or a **Zip/Postal Code** to search for. Then click the **Search** button.



The screenshot shows a web interface titled "Manage Test Locations". Below the title is a section "Search For Test Locations". It contains two input fields: "City:" with the text "Everson" entered, and "Zip/Postal Code:" which is empty. Below these fields is a "Search" button.

Once the search is complete, a list of locations that matched the search criteria is returned. Select the test location you wish to modify, then click the **Edit** button.



The screenshot shows a web interface titled "Select Test Location". Below the title is a section "Select Test Location:" with a dropdown menu. The dropdown menu is open, showing the text "1065 E Pole Rd Everson, WA 98247". Below the dropdown menu is an "Edit" button.

The user is then given the ability to modify some of the test location details and some of the details of the tests performed at that location.

## Manage Test Location Details

In the **Change Test Location Details** section, the user can change the details of the test location.

The following details will change in **all** past and future rCloud test reports:

1. Address 1
2. Address 2
3. Suite Number
4. City
5. State/Province

6. Zip/Postal Code
7. Country
8. Year Constructed
9. New construction / Not Mapped

However, the four details below will only change in future rCloud test reports as they are used in the calculation of the test results and therefore cannot be changed for past rCloud tests:

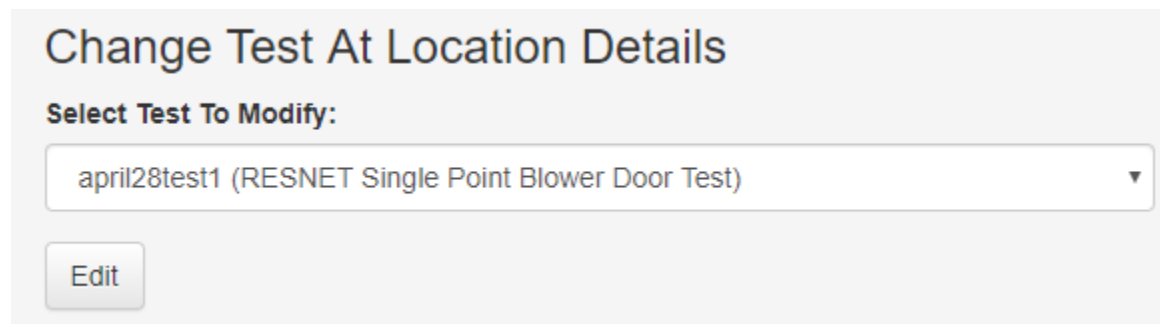
1. Building Type
2. Floor Area
3. Volume
4. Elevation

If the test location is not new to the Portal, the Portal will attempt to verify the address just as rCloud does. It should be noted that the user geo-location that is collected at the start of every test will not change under any circumstances.

The Portal will update the test location immediately. However, any open rCloud test reports will need to be refreshed in the browser to reflect these updates.

### [Manage Test At Location Details](#)

In the ***Change Test At Location Details*** section, the user has the ability to change some of the details on each test completed at that location. Select the test you wish to modify and click the ***Edit*** button.



The screenshot shows a user interface for editing test details. At the top, the title "Change Test At Location Details" is displayed in a large, dark font. Below the title, there is a label "Select Test To Modify:" followed by a dropdown menu. The dropdown menu is open, showing the selected test name "april28test1 (RESNET Single Point Blower Door Test)" and a small downward-pointing triangle on the right side. Below the dropdown menu, there is a button labeled "Edit".

The user can now edit the test name and the test notes.



**Name:**

april28test1

**Notes:**

Save

The Portal will update the test immediately. However, any open rCloud test reports will need to be refreshed in the browser to reflect these updates.

## Viewing rCloud Test Reports

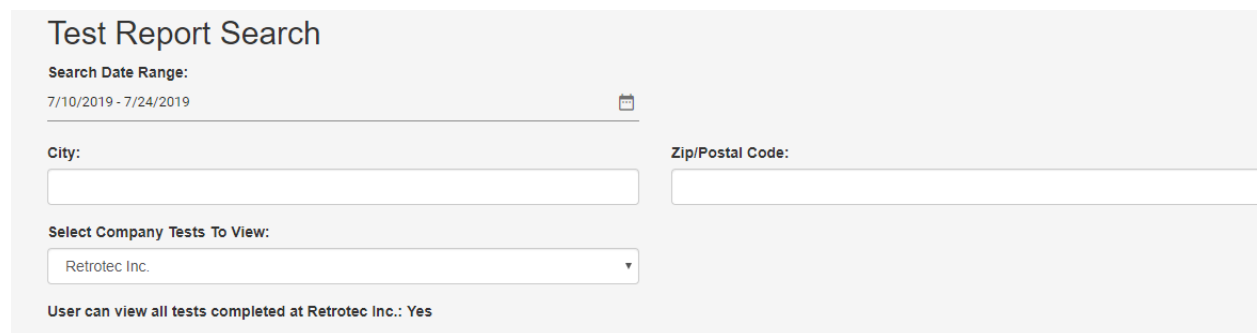
Users can search for all their completed rCloud test reports as well as any test reports that they have been given permission to view.

### Searching for rCloud Test Reports

The following search criteria can be used to narrow down the search for rCloud reports:

1. Date Range (required) – by default it sets the range to the last two weeks.
2. City (optional)
3. Zip/Postal Code (optional)

If the user has been invited to view the tests of another company, the user can use the **Select Company Tests To View** dropdown to choose which Company record to search through.



The screenshot shows a search form titled "Test Report Search". It includes a "Search Date Range" field with a calendar icon, currently set to "7/10/2019 - 7/24/2019". There are input fields for "City:" and "Zip/Postal Code:". A dropdown menu for "Select Company Tests To View:" is set to "Retrotec Inc.". Below the dropdown, it says "User can view all tests completed at Retrotec Inc.: Yes".

Once the search criteria are set, click the **Search** button. The results are displayed in a list on the page. To view the test just click in the row of the test in the list. The user is given the ability to filter the results by typing in the filter row above the results the text to filter on.

Test date	Test name	Test location	Test type	Technici...
			RESNET Single	
2019-03-11 3:30 PM	hugog	1060 E Pole Rd Everson, WA 98247	RESNET Single Point Duct Test	Ed Barnes
2019-03-06 2:41 PM	uhubybv	1060 E Pole Rd Everson, WA 98247	RESNET Single Point Duct Test	Ed Barnes

## Future Enhancements to Portal

There are a lot of future enhancements coming to the Portal. The Retrotec Software Development team is always open to suggestions and change requests. The Lead Software Engineer can be reached at [ed.barnes@retrotec.com](mailto:ed.barnes@retrotec.com).

Some enhancements that are under consideration:

1. Ability to share equipment across a company. A company user can enter in fan and flow equation parameter information just once and it would be pushed to all rCloud devices attached to company user accounts.
2. Integrating the Portal with FanTestic and FanTestic Integrity. This would allow users to access their test reports online, in one spot, at any time and from anywhere. Furthermore, it would allow users to manage their equipment in the Portal instead of having to go to each and every computer they run FT/FTI on.
3. Changing the report to a PDF report so it paginates nicely and looks more professional. Allow users the ability to add a signature, HERS Rater ID and company logo to the reports.
4. Ability to group tests into one project. The ability then to share that project via a web link to the homeowner, government agency or other interested parties.