



GB/USCLM Online

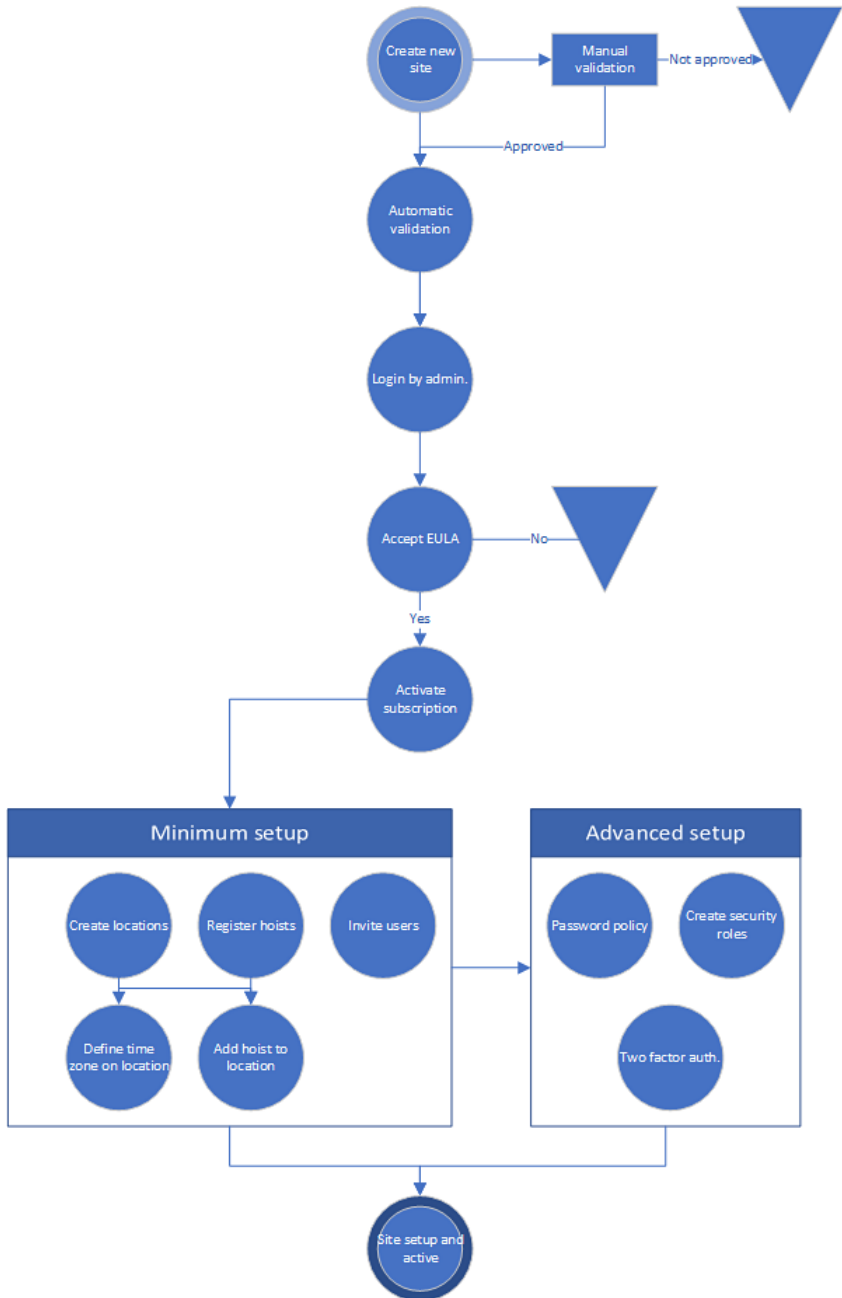
User manual – vers. 9.00

CE

Guldmann™

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The illustrated flow describes how to setup a complete new site, what is required (*Minimum setup*), and the what is optional (*Advanced setup*) and can be done anytime if desired.

The *Minimum* and *Advanced* items to setup, can be done in any order, but all parts of the *Minimum setup* box has to be fulfilled before having a functional site.

2.0 About

Guldmann CLM Online is a web-based service offering from V. Guldmann A/S that collects and displays information about your hoist installations.

The service enables customers to get an overview of usage patterns for installed hoists including lift patterns, lift weights, service status and more, depending on added options.

3.0 End-user license agreement (EULA)

An end-user license agreement (EULA) is a license that gives a user the right to use a software application in some manner. EULAs are designed to enforce specific software use limitations. EULA can be downloaded [here](#) to use the software.

3.1 Agreement

Users must accept the agreement before they continue to use the software. In case of updates to the EULA, the updated version will be presented to users, and must be accepted before access can be obtained to the site.

4.0 Sign Up as a New Customer

4.1 Prerequisites

To be able to use the CLM Online services you need to have compatible hoists. A hoist is compatible if it has the following modules installed. Please contact your local reseller, if you want to upgrade current hoists with modules to use CLM Online functionality.

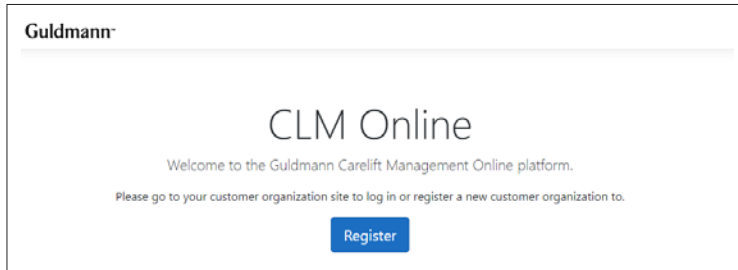
- CLM Module
- WIFI Module

4.1.1 WIFI Configuration

An authorized service technician will need to configure the WIFI module in your hoists to utilize your existing WIFI infrastructure. Please check with your technical support staff to determine if the hoists are already configured correctly at the time of installation.

4.2 Register Your Account

Go to the address <https://prod.clm.guldmann.com/> in your preferred web browser¹. Click the Register button.



¹ Browsers supported include latest version of all evergreen browsers (Google Chrome, Mozilla Firefox, Microsoft Edge (Chromium), ...)

Fill in your organization details. If you do not have states in your organization's country, simply fill in the name of the region or city.

Guldmann

1. Organization Details

Company Name VAT Number

Address

Address 2

Country

City State Zip Code

Phone

2. Site Name

A site name is needed to access your new organization portal

Site Name

3. Administrative User Account

The administrative user account will be responsible for adding users to the organization and managing permissions.

Email Password

Full Name

Job Title

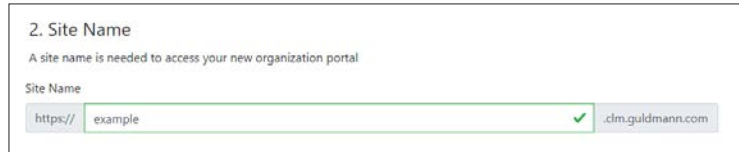
4. Account Validation

Before you gain access to Guldmann CLM Online your organization must be validated. This can happen automatically by supplying your Guldmann customer number and an invoice number. Otherwise manual validation will be performed by Guldmann which might take up to 10 business days.

Automatic Validation

The site name will provide you with a unique web address for you CLM instance. If your organization is named "Example Co." and you use "example" as a site name your CLM instance will be available at

<https://example.clm.guldmann.com/>



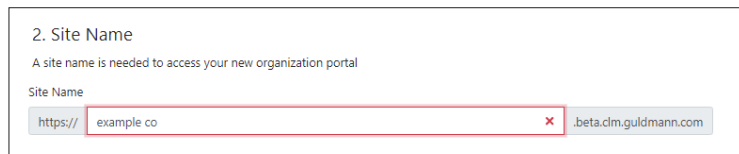
2. Site Name
A site name is needed to access your new organization portal

Site Name

https:// example ✓ .clm.guldmann.com

A green checkmark indicates that the site name is available.

No special characters are allowed in the site name, if typed by mistake or if a name already reserved is typed the input box will light up in red and will be marked with a cross.



2. Site Name
A site name is needed to access your new organization portal

Site Name

https:// example co ✗ .beta.clm.guldmann.com

The administrative user account will be the first user account with access to your newly created CLM instance.

You will need this account to login and invite other users as well as other administrative tasks.

4.2.1

Account Validation

To gain access to Guldmann CLM Online you will need to be a verified customer by Guldmann.

If you order directly from Guldmann you can use an automated validation process to gain access immediately.

On the other hand, if you do business with a local distributor you will need to wait for manual validation by Guldmann. It can take up to 10 business days, for the validation to complete. Once the validation has been approved or rejected, information will be given by email to the administrative account.

4.2.1.1

Automated Validation

If you are a direct customer of Guldmann you can use the automated validation process. Check the "Automatic Validation" checkbox and provide your Guldmann customer number and a recent invoice number, for the system to use to validate you as a customer, both customer and invoice number can be found on a recent invoice from Guldmann, the account number given at this point, will be the registered invoice account for subscription payment.

4.2.1.2

E-mail Confirm

To complete the registration, an email is sent to the address provided as administrative contact. The email contains a link to confirm the account.

The validation must be performed within 24 hours, otherwise a new confirmation mail must be requested, this can be done from the login page at site address [https://\[site name\].clm.guldmann.com](https://[site name].clm.guldmann.com).

Please note: If you haven't received the confirmation e-mail within minutes, please check your SPAM-filter, or contact your IT-department for further assistance.

The sender address is noreply@guldmann.com on all e-mail messages originating from the CLM online platform.

5.0 At first login by administrator

5.1 EULA

See section “3.0 End-user license agreement (EULA)” on page 5

5.2 Subscription

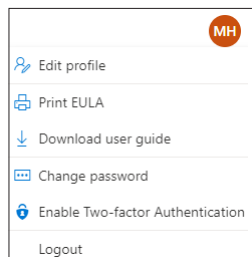
See section “11.0 Subscriptions” on page 24

5.3 Adding users

See section “10.1 Inviting Users” on page 20

6.0 User profile menu

When logged in to CLM online, click the users profile badge, found in the upper right corner, to open the menu.



6.1 Edit profile
Edit users full name and job title.
This information will show up when administrating users (section *10.0 User Administration* on page 20) and user roles (section *10.2 User Roles* on page 20)

When looking at the Audit log (section *10.6 Audit* on page 24) the users full name will be shown.

6.2 Print EULA
View or print the current End User License Agreement.

6.3 Download user guide
Link to the most recent user guide.

6.4 Change password
Update your password, new passwords will be validated against the password policy as described in section *10.4 Password Policy* on page 23.

6.5 Enable two-factor authentication
See section *10.5 Two-Factor Authentication* on page 23, on howto setup this extra layer of security. 2-factor authentication may have been forced by the administrator. In case of required 2-factor authentication this menu is grayed out.

6.6 About
Support e-mail

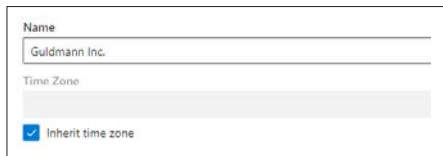
6.7 Logout
Logout from CLM

7.0 Locations
In Guldmann CLM Online "Locations" is a key concept for organizing your hoists. Every hoist should be assigned to a location to take full advantage of the software.

7.1 Designing Your Location Hierarchy
To best utilize the location hierarchy, it should be designed with geographical and organizational location in mind.

Time zones are administered at the location level, which dictates that hoists installed in different time zones are organized into different locations and it is possible to inherit time zones from the previous node location.

If “Inherit time zone” is unselected a specific time zone can be assigned to the location, be aware that any location below this location, will inherit the chosen time zone.



Name
Guldmann Inc.

Time Zone

Inherit time zone

User / role permissions, too, are administered at the location level. This means that it is possible to allow or deny a user permission to see specific data only at a location level and not for individual hoists.

A good hierarchy could be

Country > State > City > Facility > Floor > Section > Room

Feel free to simplify and adapt to your organization by removing parts of the hierarchy but keep a similar relationship between the different locations.

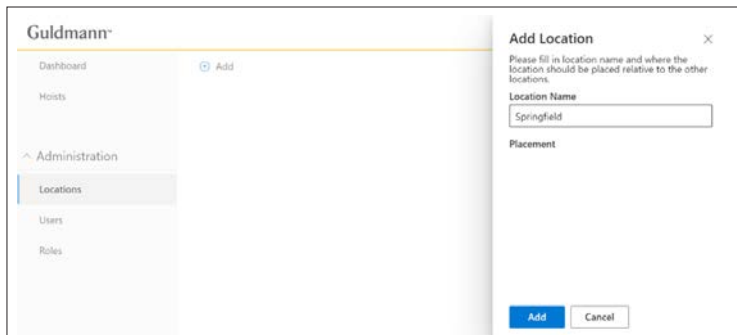
7.2

Adding Locations

By default, there are no locations in a newly registered account.

To start adding locations go the “Locations” page found in the left-side menu in the “Administration” section.

Click the “Add” button to add your first location.



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Dashboard Add

Hoists

Administration

Locations

Users

Roles

Add Location

Please fill in location name and where the location should be placed relative to the other locations.

Location Name
Springfield

Placement

Add Cancel

Fill in the name of the location and click “Add”.

To add another location beneath the newly added location, click “Add” again, fill in the location name, and select the location you just added as the “Placement”.

7.3 Deleting location

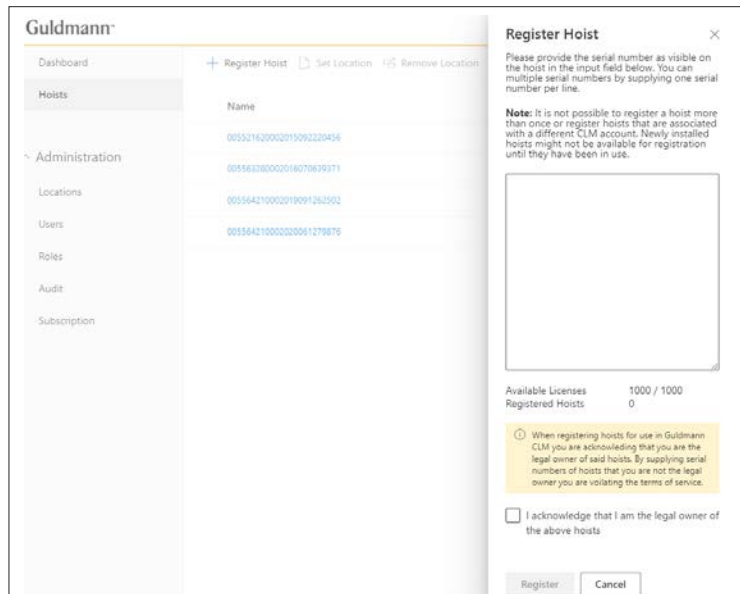
A location can be deleted, select the location, and click the Trash bin, deleting a location must be confirmed, pay attention that if any location(s) exists below the one to delete, in the location structure, they will be removed as well.

Hoists belonging to this, or any sub location, needs be to re-assigned a location, no hoists will be deleted, by maintain the location tree.

8.0 Hoists

8.1 Registering Your Hoists

To register your hoists with your CLM site, click the “Hoists” menu item at the left navigation menu. Proceed to click “Register Hoist”.



Collect the serial numbers printed of the product label of your hoists and type them in the text field – one per line. Errors can occur and a detailed error description will prompt, when registering. Examples of errors would be.

- No activations received from hoist
- Hoist already activated
- Etc.

8.2 Organizing Hoists

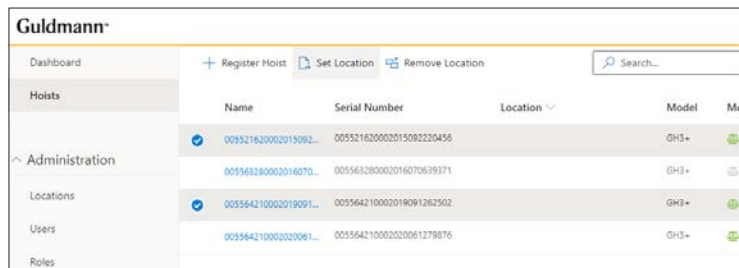
Hoists should be organized into locations to take full advantage of the system. Hoists not assigned to a location will not show as data on the dashboard, and neither have time zone rules applied.

It is not possible to assign security rules to individual hoists.

8.2.1 Adding hoist to a location

To add one or more hoist to a location, open the Hoists menu in the left side, select the hoist(s) you want to assign a location, and click “Set Location”. The location tree defined will show in the right side, click the desired location and select “Assign”.

After a few minutes the lifts from assigned hoists will show up on the dashboard. Depending on the number of activations and hoists added, it could take several minutes to recalculate their lifts due to correction of by time zone, defined by the location.



Guldmann					
Dashboard					
		+ Register Hoist	Set Location	Remove Location	Search...
Hoists	Name	Serial Number	Location	Model	M
Administration	005521620002015092...	005521620002015092220456		GH3+	
	005565280002016070...	005565280002016070639371		GH3+	
Locations	005564210002019091...	005564210002019091262502		GH3+	
	005564210002020061...	005564210002020061279876		GH3+	
Users					
Roles					

8.2.2 Move hoist to another location

One or more hoist can be moved to another location by following the principle in “8.2.1 Adding hoist to a location” on page 13.

8.2.3 Remove hoist from a given location

One or more hoist(s) can be removed, from their defined location, selectin the hoists in the “Hoist” menu and click “Remove Location”, if no location is given on a hoist, data from this hoist will not be visible on the dashboard.

8.3 Unregister hoist

It is not possible to delete a registered hoist from the system, once registered the registration is permanent.

If for any reason a hoist and data should be removed from the dashboard, this can be accomplished by removing the location information from this specific hoist, see “8.2.3 Remove hoist from a given location” on page 13.

8.4


Details View

To see more details about individual hoists, you can bring up the hoist details panel, do so, by clicking on the hoist in the "Name" column.

The details panel will show all available information about the hoist. Examples are:

- Service information (if equipped with service module)
- Information about communication, will always show in UTC (Coordinated Universal Time) time
- Model
- Location
- Working load
- Etc.

GH3+



Model
GH3+

Serial Number
005563280002016070639371

Location
Aarhus

Safe Working Load (SWL)
250 kg / 551 lbs

Service Module
Yes

Scale Module
No

Next Service
12/01/2021

Last Service
12/01/2020

Communication

Last Communication With Hoist
09/10/2021, 1:40 PM UTC

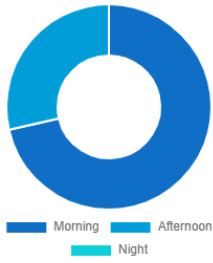
Most Recent Activation Date
09/10/2021, 1:39 PM UTC

Latest Activations Received
09/10/2021, 1:40 PM UTC

Statistics

Timespan: **Last 7 days**

Daily lifts



Time of Day	Percentage of Daily Lifts
Morning	~65%
Afternoon	~30%
Night	~5%

8.5

Hoist modules

In views, where either data or hoist is shown, icons will show, to indicate what modules the particular hoist contains.

Two different modules are available, which is Service and the scale module.



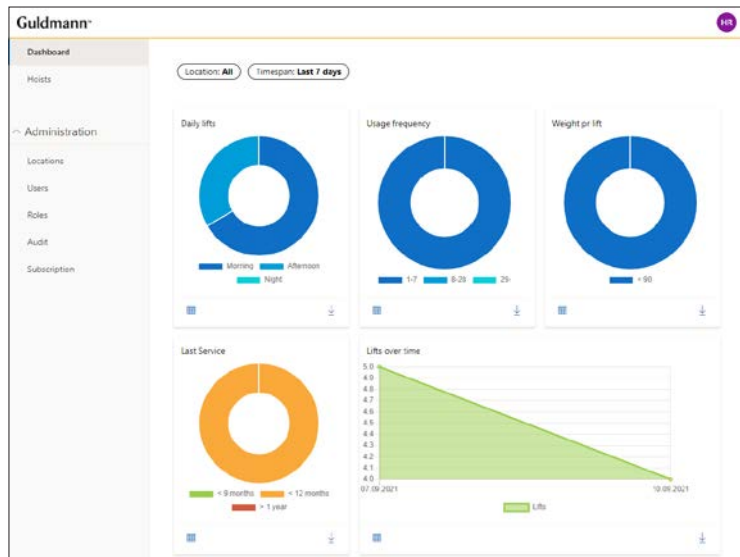
If a hoist has the module installed, the icon will show in green, otherwise it'll be grayed out.

9.0

Dashboard

When locations and hoists has been configured and setup, the dashboard will show lifts and service information, based on the filter criteria as defined in the top of page, and only for locations that are allowed in the user's security "Role".

The dashboard will always show, as the main page, and displays a visualization of your hoist data.



9.1 Prerequisites

Data send from hoists are defined as activations², these activations are “washed” and grouped into lifts by our data indexer, before lifts can be shown on the dashboard, depending on the amount of information received from hoists, the indexer can be delayed several minutes, and you might not expect the lifts to be a live view.

9.1.1 How are activations grouped to form a lift?

All activations registered, with a weight less than or equal to 5 kilograms, are dismissed and will not be grouped into any lift.

- Activations performed that are **less than 60** seconds between each other, are grouped into a lift.
- The **weight** of lift is the maximum weight in kilogram, on any of these grouped activations.
- The **duration** of the lift is calculated as $([Start\ time\ of\ last\ activation] + [Duration\ of\ activation]) - [Start\ time\ of\ first\ activation]$ the result will show in seconds.
- The **height** of a lift is defined by a summing all heights/activation, the result will be in centimeter.

9.2 Filter data

You can filter the view of the dashboard, to show specific locations and limit the data to certain time range.

9.2.1 Time range filter

The filter timespan, filter data belonging to the selected filter value

Timespan	Explanation	
Yesterday	--	Timespan: Last 7 days
Last 7 days	Last 7 days including today	Yesterday
Last 14 days	Last 14 days including today	Last 7 days
Last 30 days	Last 30 days including today	Last 14 days
Current month	Lifts performed within current month	Last 30 days
Previous month	Lifts performed in previous month	Current month
Custom	With custom date an interval of dates can be specified, using the calendar. From and to date, are both included, in the filtered data.	Previous month
		Custom...

² Activation is defined as a push on the up button, on the hoists hand control, and each activation has the following information attached, weight measured in kilogram, height lifted in centimeter, duration of activation in seconds and the activation start time and date.

9.2.2

Location filter

By using the location filter, a given subtree of the location tree can be filtered out.

If the location selected, contains any sub-locations, data from sub-location will be included in the result, only one location can be selected.

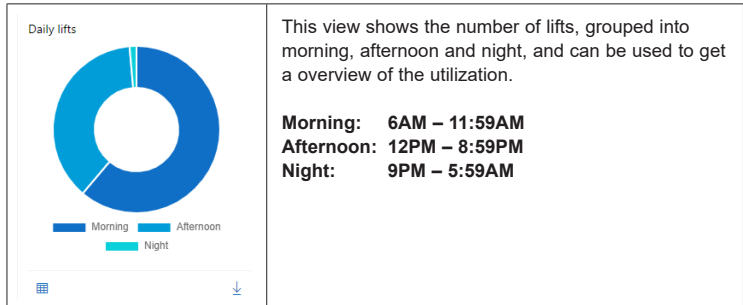
The list of location will respect the security setup, and therefore only show location where access has been granted as defined in *“10.2.1 Assigning users to a security role” on page 21.*

9.3

Understanding the Dashboard Charts

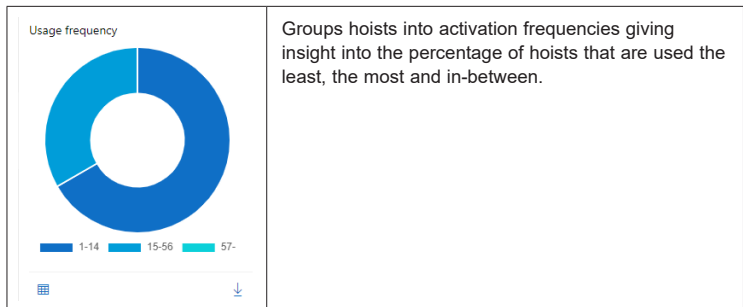
9.3.1

Daily lifts



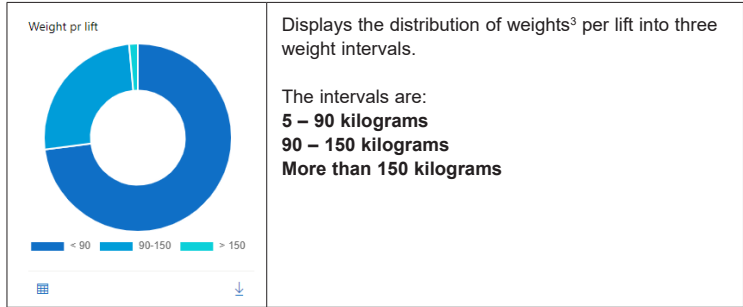
9.3.2

Usage frequency



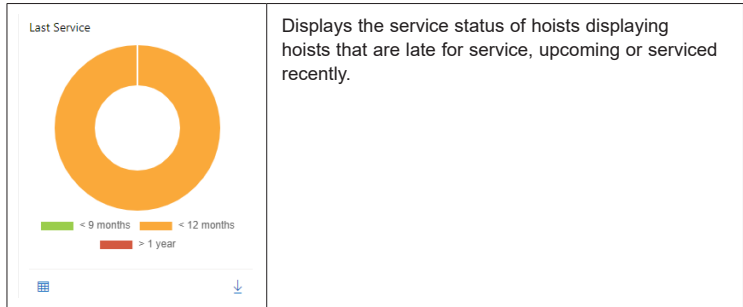
9.3.3

Weight per lift



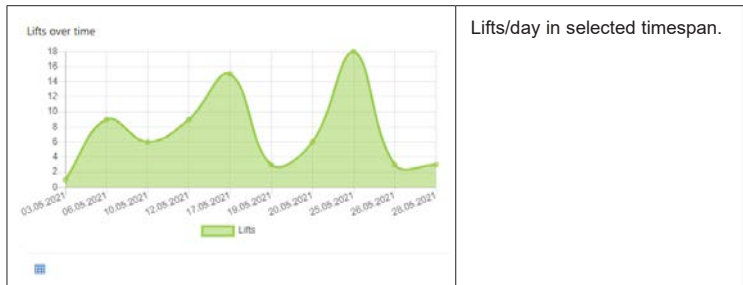
9.3.4

Last Service



9.3.5

Lifts over time



³ Some weights might be estimated, this happens when a hoist does not contain the scale module, and the weight registered, is based on the hoists power consumption when lifting, and therefore some variations is expected.

9.4

Viewing and Downloading detailed data

Beneath each chart on the dashboard, there are two buttons – one to view the data the chart is based on, and one to download the data as a CSV or Excel file.



View data using a data table

Lifts over time							
Modu...	Name	Date	Location	Seconds	Height	Weight	
	005521620002015092220456	2021-03-24T09:31:51	Aarhus	48	57	73.5	
	005521620002015092220456	2020-12-15T09:08:18	Aarhus	11	51	91	
	005521620002015092220456	2020-12-15T09:02:33	Aarhus	19	63	35.1	
	005521620002015092220456	2020-12-15T09:01:24	Aarhus	5	27	49.2	
	005521620002015092220456	2020-12-15T08:59:52	Aarhus	4	23	66.9	
	005521620002015092220456	2020-12-15T08:57:10	Aarhus	65	29	31.8	



Download CSV file (comma-separated)

```
HoistSerialNo,Date,LocationName,Seconds,Height,Weight,DisplaySerialNo
005521620002015092220456,03/24/2021 09:31:51,Aarhus,48,57,73.5,005521620002015092220456
005521620002015092220456,12/15/2020 09:08:18,Aarhus,11,51,91.00,005521620002015092220456
005521620002015092220456,12/15/2020 09:02:33,Aarhus,19,63,35.10,005521620002015092220456
005521620002015092220456,12/15/2020 09:01:24,Aarhus,5,27,49.20,005521620002015092220456
005521620002015092220456,12/15/2020 08:59:52,Aarhus,4,23,66.90,005521620002015092220456
005521620002015092220456,12/15/2020 08:57:10,Aarhus,65,29,31.80,005521620002015092220456
005521620002015092220456,12/15/2020 08:54:39,Aarhus,2,9,6.10,005521620002015092220456
```



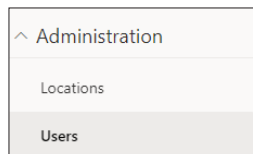
Download Excel file, localization defined, by the client device.

	A	B	C	D	E	F	G
1	HoistSerialNo	Date	LocationName	Seconds	Height	Weight	DisplaySerialNo
2	005521620002015092220456	24-03-2021 09:31	Aarhus	48	57	73.5	005521620002015092220456
3	005521620002015092220456	15-12-2020 09:08	Aarhus	11	51	91	005521620002015092220456
4	005521620002015092220456	15-12-2020 09:02	Aarhus	19	63	35.1	005521620002015092220456
5	005521620002015092220456	15-12-2020 09:01	Aarhus	5	27	49.2	005521620002015092220456
6	005521620002015092220456	15-12-2020 08:59	Aarhus	4	23	66.9	005521620002015092220456
7	005521620002015092220456	15-12-2020 08:57	Aarhus	65	29	31.8	005521620002015092220456
8	005521620002015092220456	15-12-2020 08:54	Aarhus	2	9	6.1	005521620002015092220456
9	005521620002015092220456	15-12-2020 08:52	Aarhus	6	33	6.9	005521620002015092220456
10	005521620002015092220456	15-12-2020 08:48	Aarhus	56	60	103.9	005521620002015092220456
11	005521620002015092220456	01-12-2020 12:35	Aarhus	5	7	201	005521620002015092220456

10.0

User Administration

If you are assigned an administrator role you can manage the users that have access to the system. Click the “Users” link in the left side menu underneath “Administration”.



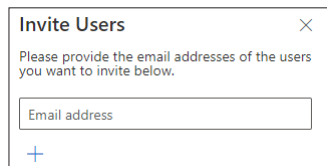
10.1

Inviting Users

To invite new users, simply click the “Invite” button, at the top of the users administration page, a panel will appear where you fill in the email address of the person you want to invite.

If more users should be invited, click the plus for every user.

Invited users will receive a confirmation e-mail, that needs to be accepted within 24 hours see “4.2.1.2 E-mail Confirm” on page 9, to gain access.



10.2

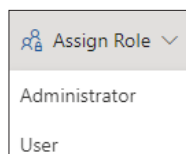
User Roles

Roles determine what kind of access your users have and which data they can see.

2 different roles “User” and “Administrator” are predefined in the system.

Users assigned to the “Administrator” role, gets full access to all data and will be able to do all administrative tasks, such as register hoists, create roles, invite users and so on.

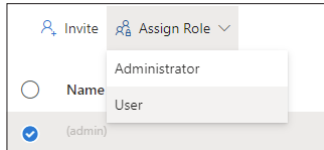
Users assigned the “User” role, gets read access to all locations and can see any lifts, collected in the dashboard.



When new users are invited, it is important to assign them a role in CLM Online, this can be done immediately after sending the Invite, by a person in the “Administrator” role.

10.2.1 Assigning users to a security role

To assign users to roles mark the users in the users’ page by clicking the circle to the left of the usernames and click “Assign Role”. Users can only be assigned a single role at a time.



Assign Allow users to view locations by assign ‘allow’ role to the chosen location.

10.2.2 Maintaining roles

Roles can be maintained in the “Roles” menu, found in the administration section on the left side.

A role is defined by a name, and a list of locations where “allow” or “deny” permission is assigned.

It is not possible to change or update the “administrator” role.



By default, the “user” role has view access on any location, this can be updated.

10.2.3 Creating new user roles

A new role can be defined by clicking the 3 dots in top of the “Roles” page, and select “Add Role”

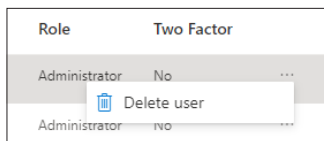
1. Name the new role
2. Click “Save”
3. Select the new role
4. Add locations to this role by clicking +
5. Define either “Allow” or “Deny” to the added location.
6. When finished click “Save”
7. Assign users to the newly created role as described in “10.2.1 Assigning users to a security role” on page 21

10.2.4 Delete role

All roles except the “Administrator” role can be deleted, by clicking the role name, and afterwards clicking the Trash bin. Deleting a role has to be confirmed. If users are assigned this role, please be aware that they loose access to CLM-Online until they are assigned a new or other role in the system, see “10.2.1 Assigning users to a security role” on page 21.

10.3 Delete user

An administrator in the system can delete users, the delete user function is found to the right of any username, by clicking the 3 dots. The deletion must be acknowledged, by clicking OK.



The screenshot shows a table with two columns: 'Role' and 'Two Factor'. The first row has 'Administrator' and 'No'. A context menu is open over the first row, showing a trash icon and the text 'Delete user'. The second row also has 'Administrator' and 'No'.

Role	Two Factor
Administrator	No
Administrator	No

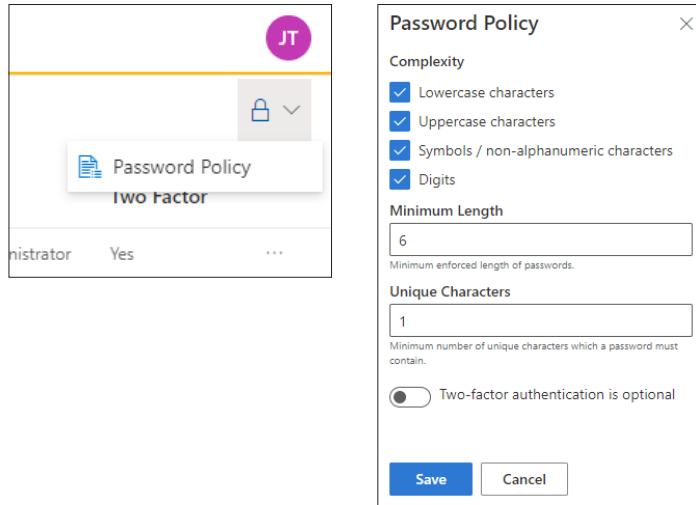
10.4

Password Policy

You can setup requirements on password complexity, and minimum length in the password policy dialog.

To open the dialog, click the lock icon in the top right corner of the user administration page, and click password policy. Password policy, can only be managed by a user in the “Administrator” role.

By defining a Password policy it can be assured that accessing the system, follows the security policy defined in your facility.



10.5

Two-Factor Authentication

All users are free to enable two factor authentication by clicking their user badge in the top right corner and then click “Enable two-factor authentication”.

Supported two factor authentication method is a TOTP-compatible applications like Google Authenticator or Microsoft Authenticator.

An administrator can enforce users of the system to enable two-factor authentication, by toggling the “Enforce two factor authentication” toggle in the password policy dialog.

10.5.1 Enable Two-factor Authentication steps:

1. Download your preferred authenticator app, if not already installed. The preferred app can be found at either Apple Store if you have an Apple product, or go to Google Play store if you have an Android product.
2. Scan the QR code or enter the key (Note: Only an example key shown here), when setting up your preferred Authenticator App. The authenticator app will provide you with the Authenticator code that has to be put in as verification.



```
obqp 3q57 zaxs tjzs g6pn  
ky2x b3g4 7sap
```

3. Verify Authenticator Code

Once you have scanned the QR code or input the key above, your two factor authentication app will provide you with a unique code. Enter the code in the confirmation box below.


10.6 Audit

Audit records are stored in the system, audit record consists of what action was done in the system, by whom, when and the source of the logged action.

Audit records help explain actions in the system, and mostly used as a security measure.

11.0 Subscriptions

The first time you log in to the system, you will receive a warning that the license has expired. The system cannot be used until you create a license.

 Your license has expired or is no longer valid. Please renew your license to regain access to the site.

Subscription

11.1

Create subscription

The first 5 hoists are free and you can add more that best suit your needs. You can change the number of hoists at any time. example if "Available licenses" is 10/20, it means you can still register 10 hoists. You have the option to add a voucher code if you have received one. The subscription will automatically renew hoist licenses every month. Click the button (Create subscription) and a license will be created and CLM is ready to use.

Subscription

Available licenses	0/0
Hoists	<input type="text" value="5"/>
License plan	No license found
Price per hoist	\$0.00
Monthly amount	\$0.00
Voucher code	<input type="text" value="Voucher code"/>

Name	Period	Hoists
------	--------	--------

11.1.1

Subscription details

At the bottom of the subscription page show the current subscription. Here will you see when the subscription will renew or expire. you can always see the status of the "In use", "Cancel" and "expired" licenses. If several licenses are displayed in the list, then the top one is always the active one.

Name	Period	Hoists
Voucher	Wed, Nov 24, 2021 - Mon, Jan 24, 2022	100 In use
License	Tue, Jan 25, 2022 - Fri, Feb 25, 2022	5

11.2

Cancel your subscription

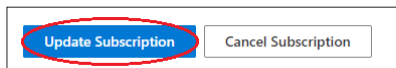
You can cancel at any time and your canceled subscription will last until the end of the paid period, but you will not be charged after. Subscription during the trial period (Voucher) will continue until the end of the period and the license will not be charged after.



11.3

Update your subscription

You can downgrade or upgrade your subscription depending on how many hoists you need to register.

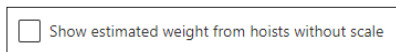


12.0

Settings

To view or modify configuration settings in CLM.



By default is the checkbox unchecked and will not calculate hoists without a scale module. If want to get the calculate with hoists without a scale module, so just check the box.



Example 1. When the check box is selected, the hoist without scale is calculated with the result.

Weight pr lift		< 90kg	90kg - 150kg	> 150kg
Modules	Name			
 	0000077992	128	10	1
 	005521570002016112903266	78	0	0

Example 2. When the check box is unselected, the hoist without scale is not calculated with the result.

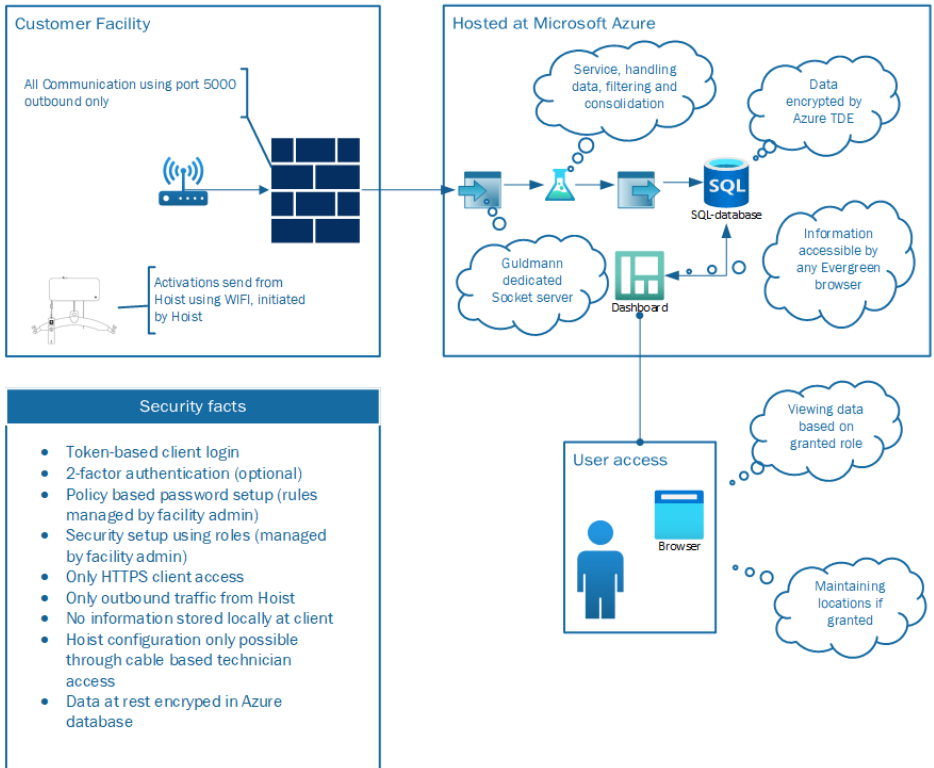
Weight pr lift				
Modules	Name	< 90kg	90kg - 150kg	> 150kg
	0000077992	128	10	1
	005521570002016112903266	0	0	0

13.0

Need help

We are here to help in case you have any question in relation to CLM Online, please contact our support e-mail clmsupport@guldmann.com

CLM Online, data flow and Storage



| Time to care |

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