

# Instagen Cloud Monitoring Platform **USER MANUAL**

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## 1. Introduction

The Instagen Cloud (Instagen Monitoring Platform) is a smart energy storage operation monitoring and management system developed by Instagen specifically for distributors, installers, and end-users of distributed PV power plants.

At present, the system has Installer version and End-user version, with the corresponding webpage and mobile application available.

This platform provides an easy-to-use procedure for accounts under monitoring. It enables installers to configure the monitored accounts quickly and provides them with power generation data of both plant and device, as well as detailed alarm information about the power plant regarding commissioning and diagnostics. This manual is intended to guide users in operating and managing Instagen Cloud.

### 1.1 System Composition

Install the DTU, inverter, smart meter, and battery before using the monitoring system. DTU is a communication gateway which is used to collect status and operation data from inverter and transmit control commands to it. At the same time, the DTU also connects to the Internet through a router and sends inverter data to the Instagen Monitoring Server to achieve remote control of the whole system.

### 1.2 Installer & End-user App/Platform

#### 1.2.1 App Download

Instagen Installer is a mobile application developed by Instagen, especially for installers of distributed plants. It is committed to better performing installation and maintenance.

Instagen End-user is a mobile application developed by Instagen, especially for owners of distributed plants. It can absorb the operating data of plants from Instagen Cloud.

- a. Scan the QR code to download.



Instagen Installer



Instagen End-user

- b. Search "Instagen Installer" or "Instagen End-user" in the Google Play or App Store.

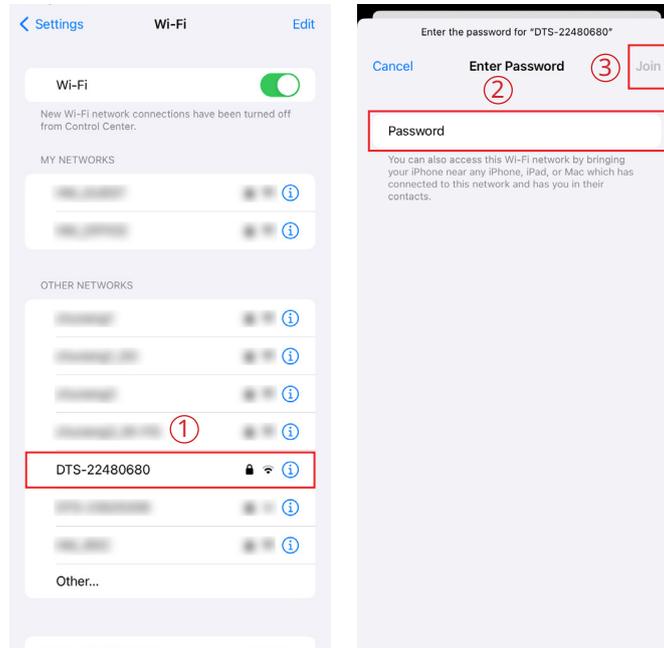
#### 1.2.2 Platform

Open the browser, and then enter <https://cloudinstagen.co.uk/platform> in the address bar to enter the login interface. Please use the latest version of Google Chrome at a resolution of 1366×768 or above.

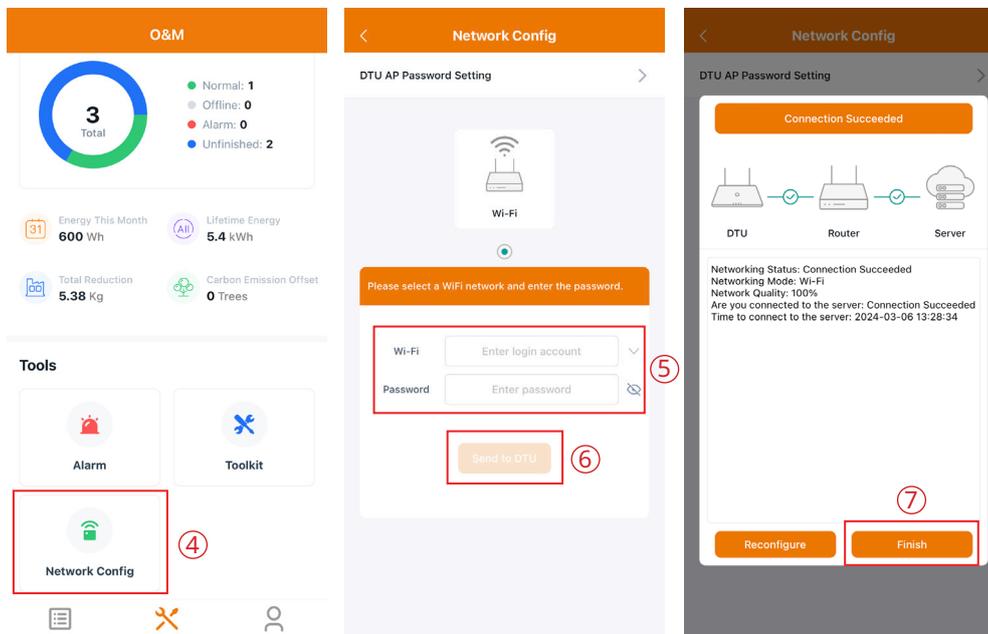
## 2. App Settings and Data Query

### 2.1 Configure the Network of DTU

a. Choose the wireless network of DTU with a serial number like “DTS-22480680” and enter the default password “ESS12345” to connect DTU.

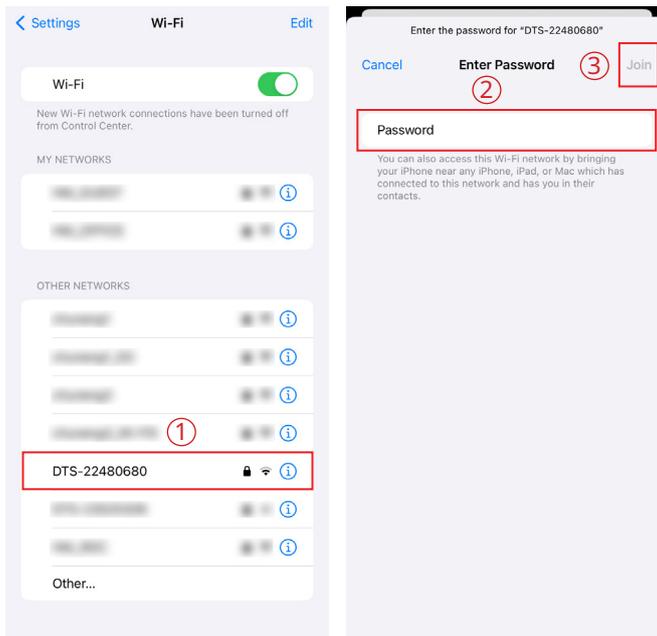


b. Open the Instagen Installer App and choose the “O&M → Network Config”. Enter the account and password of a nearby stable wireless network, tap the button of “Send to DTU”, and wait until the “Connection Succeeded” appears to tap “Finish”.

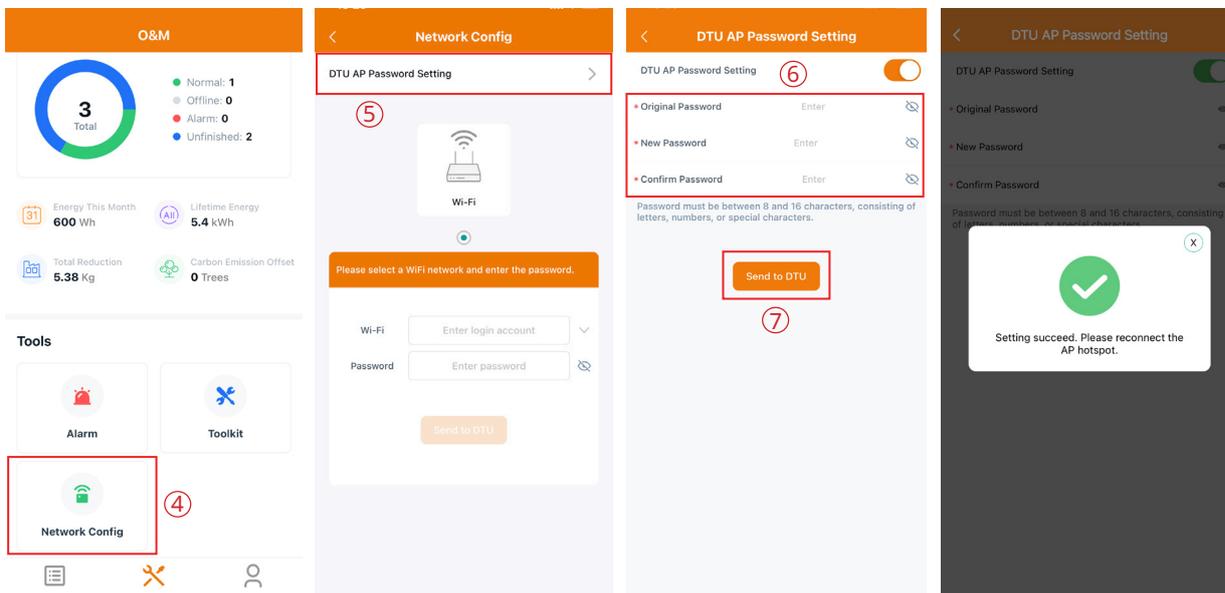


## 2.2 Change the Default Password

a. Choose the wireless network of DTU with a serial number like “DTS-22480680” and enter the default password “ESS12345” to connect DTU.



b. Open the App and choose the “O&M → Network Config → DTU AP Password Setting”. Enter the original password and new password, tap the button “Send to DTU”, and wait until “Setting succeed” appears to reconnect the DTU.



**Note:**

The Wi-Fi name and password do not support special characters such as spaces.

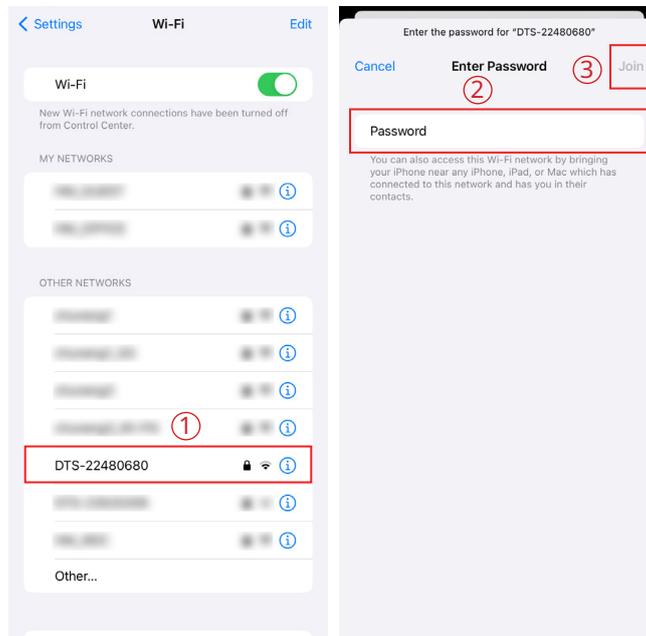
### 2.3 Reset the Password of DTU

When the DTU is powered on, long press the “SET” button on the left of the DTU for 5 seconds (DTU indicators will be off during the long press), and then the DTU password will be restored to default password “ESS12345”.

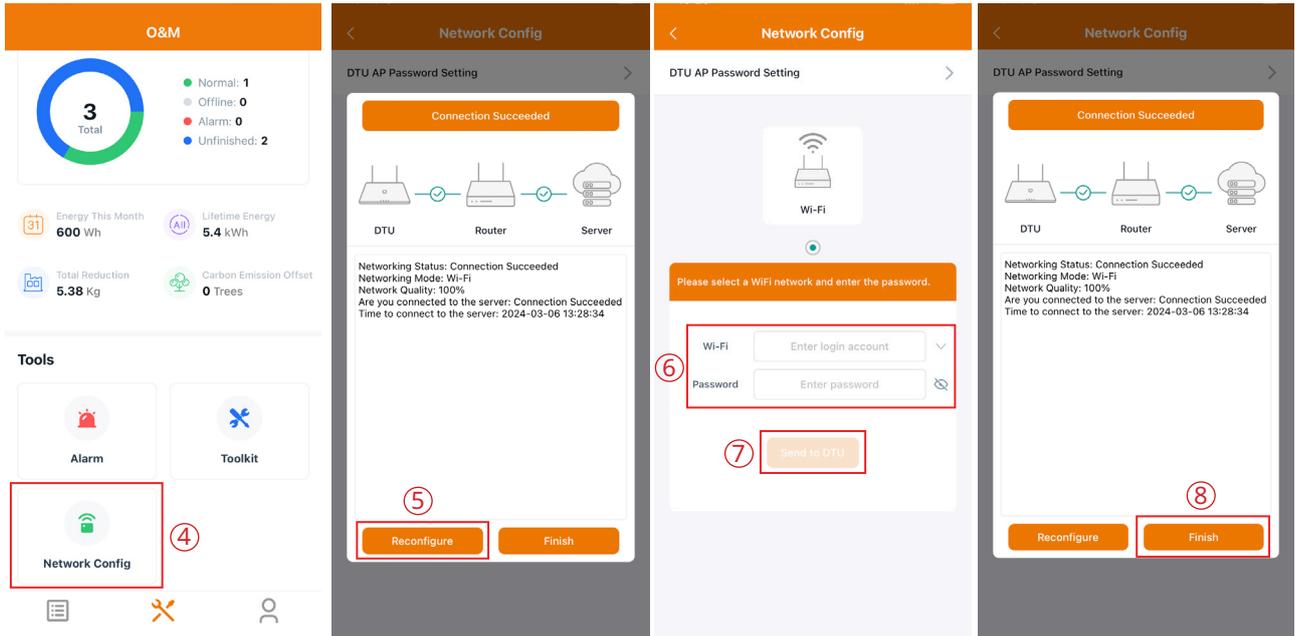


### 2.4 Reconfigure the Network of DTU

a. Choose the wireless network of DTU with a serial number like “DTS-22480680” and enter the password to connect DTU.

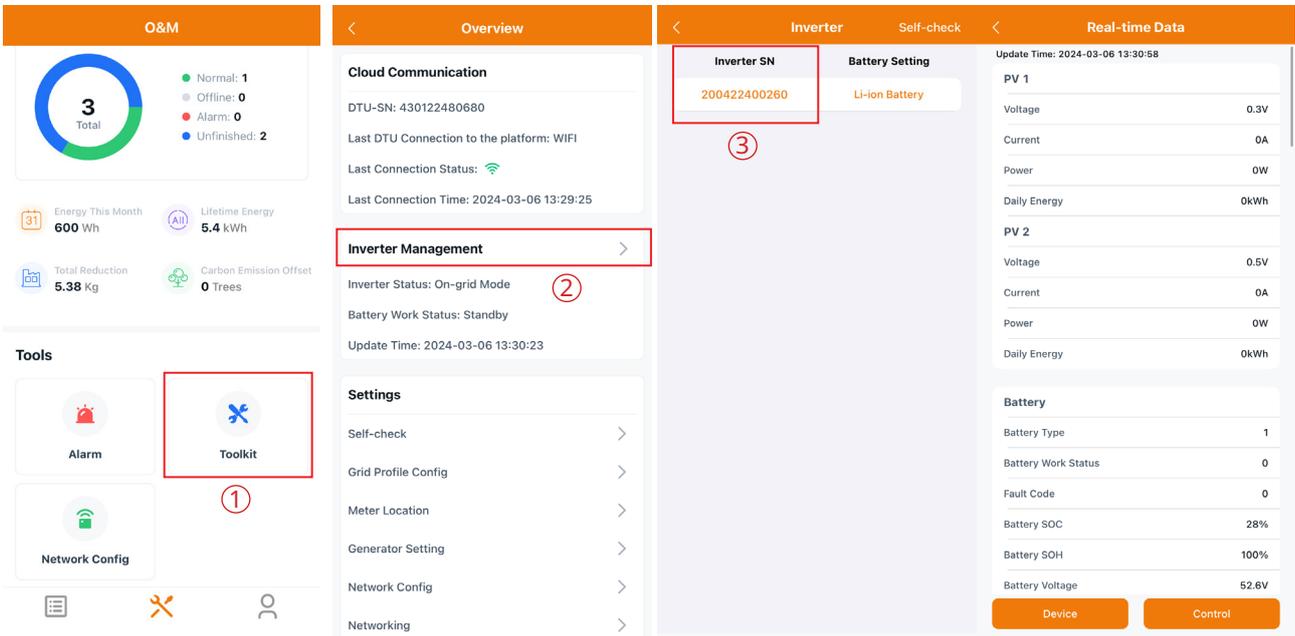


b. Open the App, choose “O&M → Network Config”, tap “Reconfigure”, and then choose a new wireless network. Enter the account and password, tap the button of “Send to DTU”, and wait until “Connection Succeeded” appears to tap “Finish”.



## 2.5 App Local Data Query

Tap “Toolkit → Inverter Management” and choose “Inverter SN”. You can check the real-time data of PV, battery, grid, load, generator, and PV inverter here.



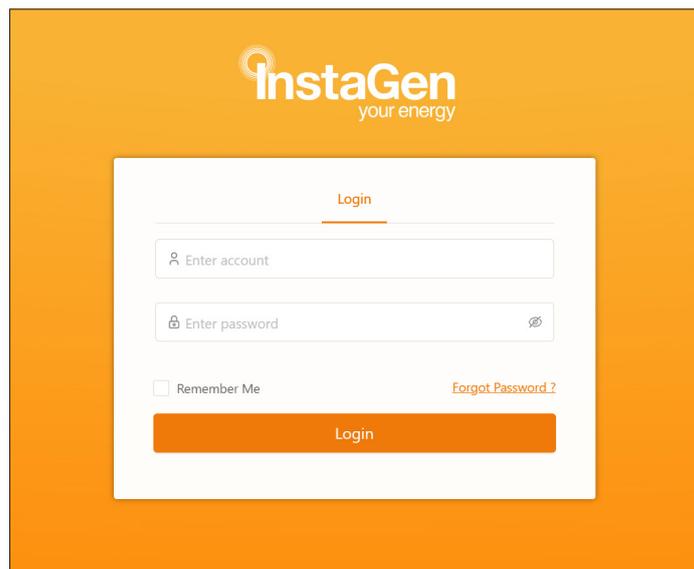
### 3. About Monitoring Account

#### 3.1 Get an Instagen Distributor/Installer Account

- (1) If you are a new distributor, send an email to [service@instagen.com](mailto:service@instagen.com). The Instagen Technical Service Center will apply for an account for you.
- (2) If you are a new installer with Instagen and don't have an installer account, approach your distributor to create an account for you.
- (3) If you are an installer/distributor and have an installer/distributor account, you can directly create subaccounts and plants under your existing account.

#### 3.2 Log in to the Insta Cloud

Go to <https://cloudinstagen.co.uk/platform> and log in to the Instagen Cloud (Instagen Monitoring Platform) with your account.

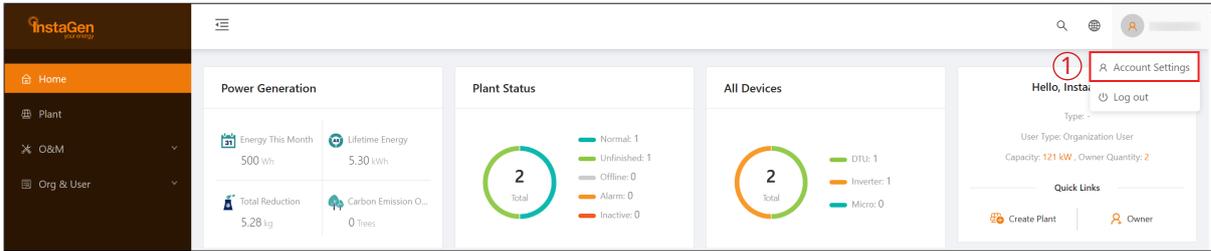


**Note:**

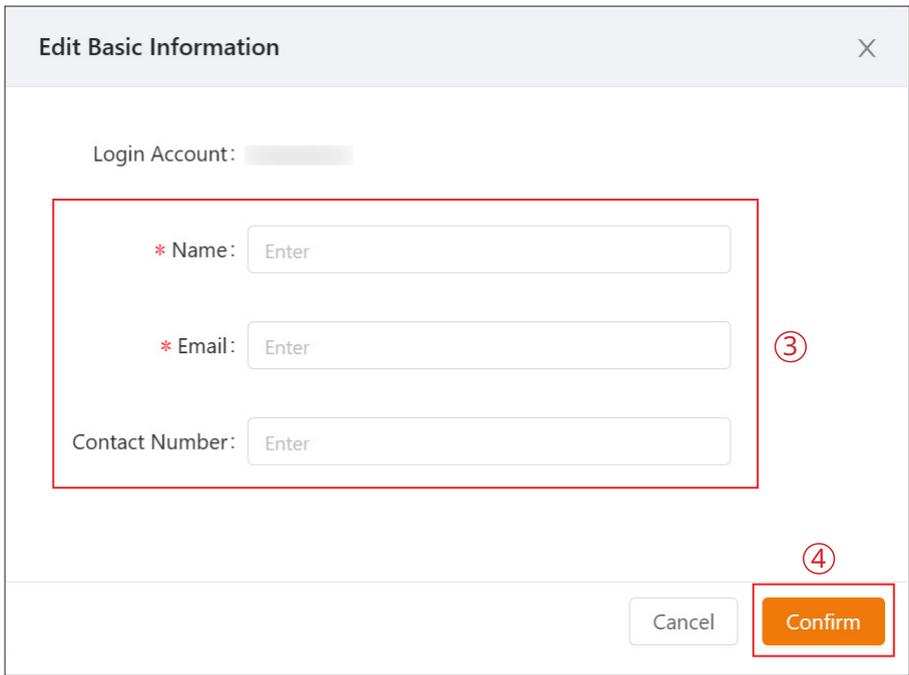
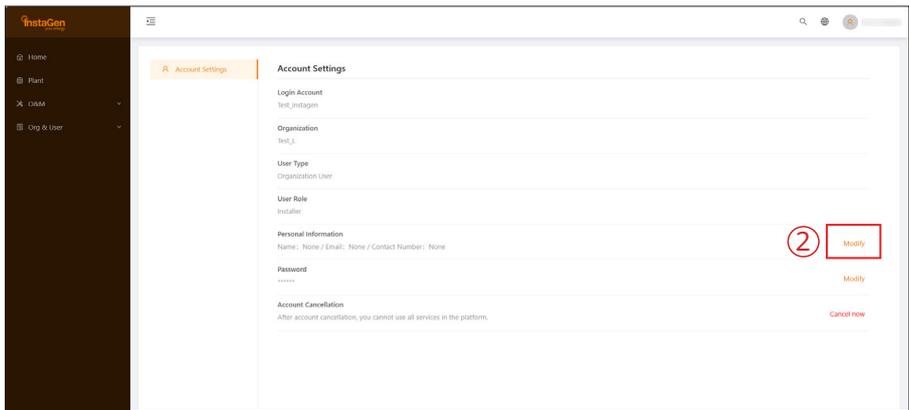
- (1) The end-user only has the authority to check the plant data and perform smart control settings.
- (2) Dealers can create distributor and installer organizations, while installers can create installer organizations and organization users.
- (3) Regular users have two user-defined roles: sub-installer and normal installer. Sub-installers can only create and edit plants and issue networking command.
- (4) An organization can have numerous login accounts, so just select the organization name and add organization users.
- (5) Email can also be used as a login account.

### 3.3 Change Email and Password

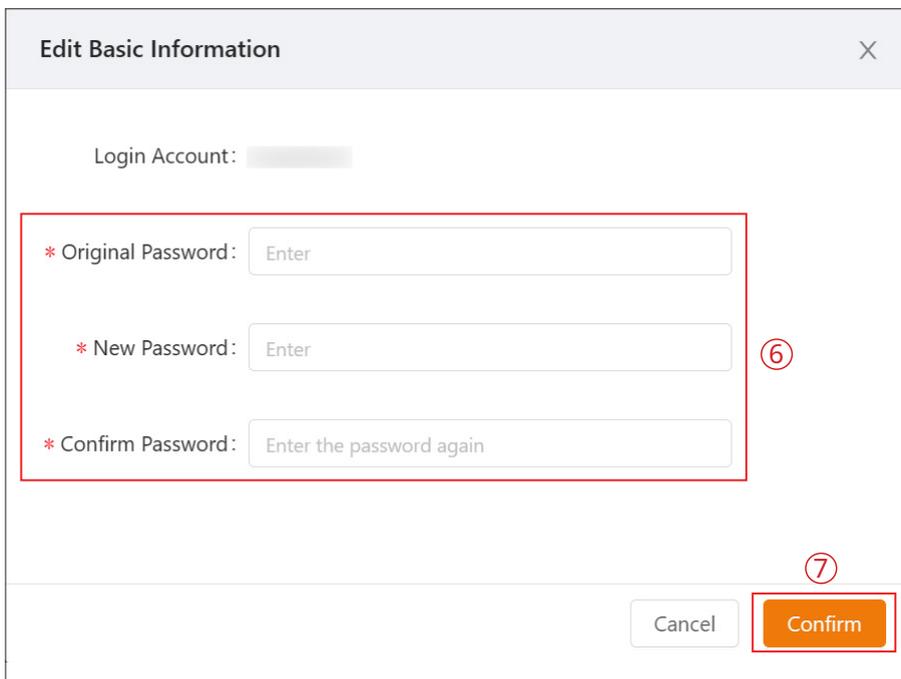
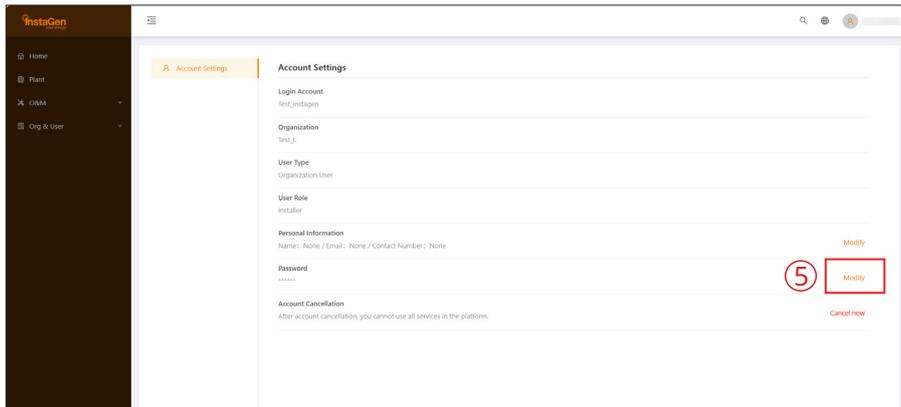
- a. Enter your account and password and log in to the Instagen monitoring platform.
- b. Select the person icon on the top right corner and click the "Account Settings" button.



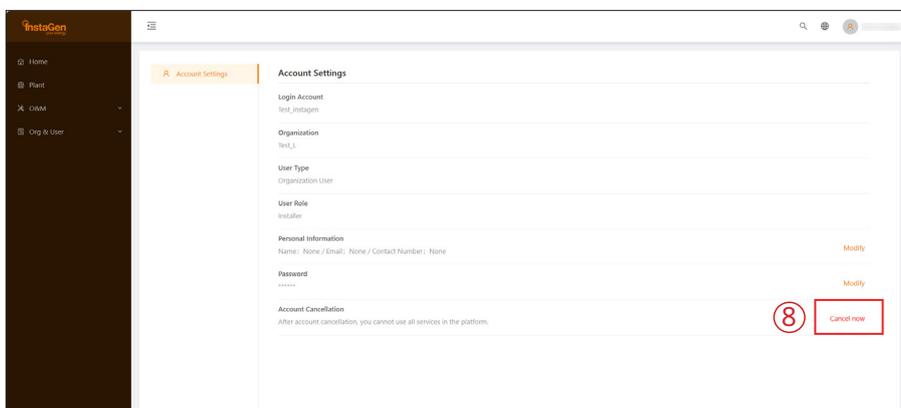
- c. Click the "Modify" button on the right of personal information, enter new Email, and then click "Confirm".

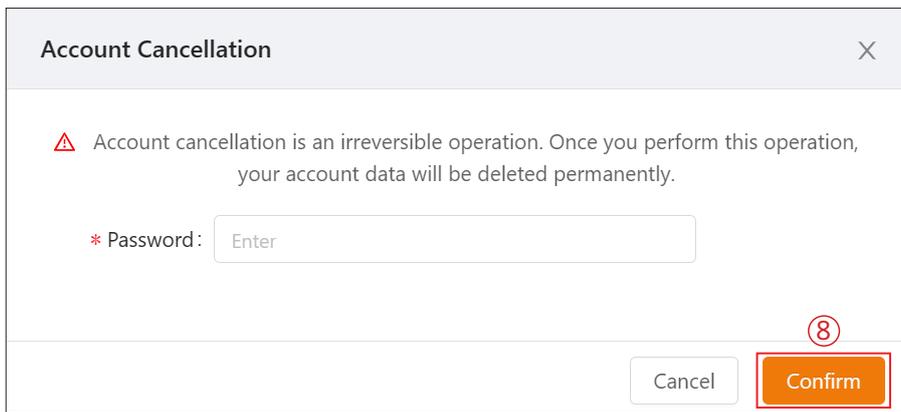


d. Click the “Modify” button on the right of password, enter the original password and new password, and then click “Confirm”.



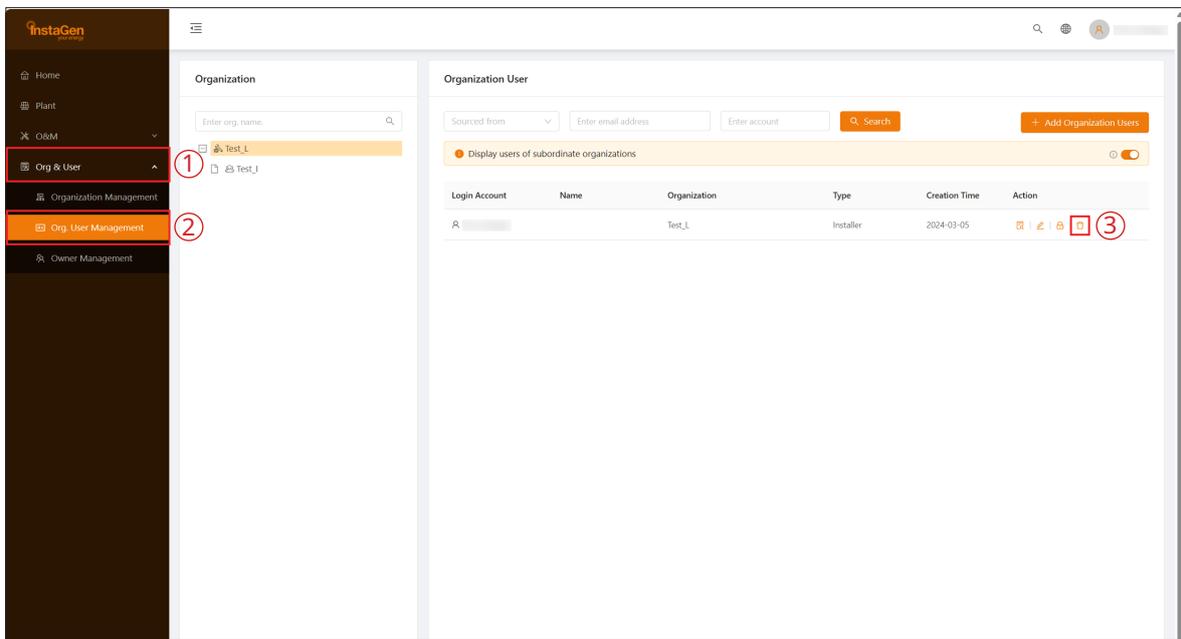
e. If you want to cancel your account, click the “Cancel now” button on the right of Account Cancellation, enter the password, and click "Confirm". Note that once you perform this operation, your account data will be deleted permanently, and you can not use all services in this platform.



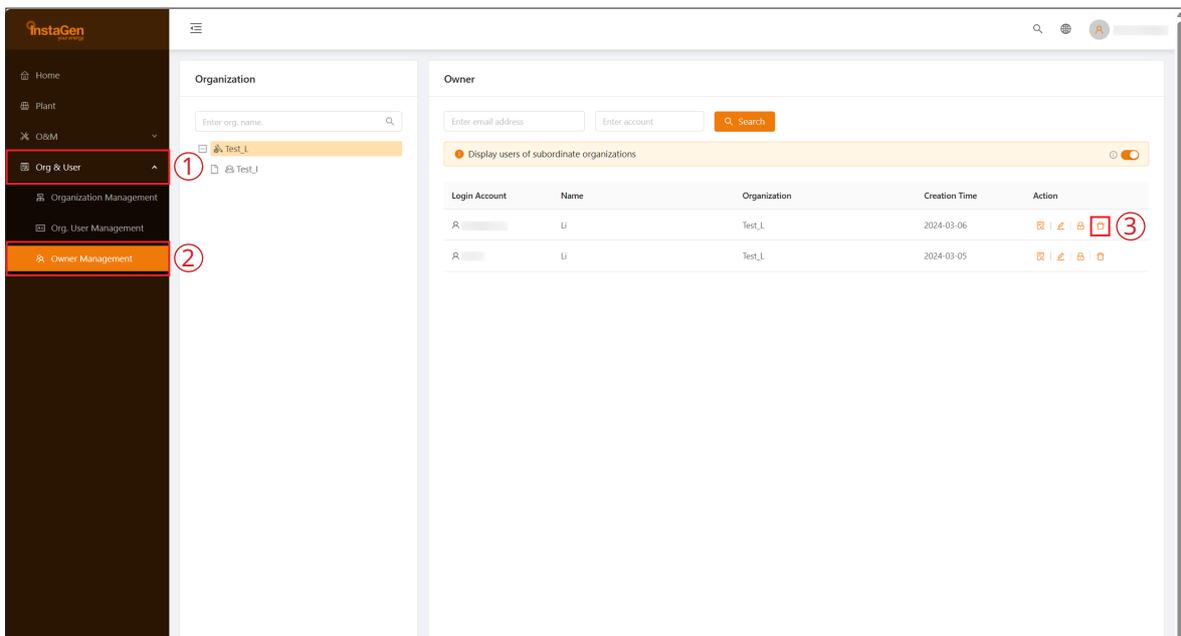


### 3.4 Delete an Account

a. Click "Org. User Management" on the menu bar under "Org & User", choose the organization, and then click the "Delete" button to complete deletion.



b. Click "Owner Management" on the menu bar under "Org & User", choose the organization, and then click the "Delete" button to complete the deletion.

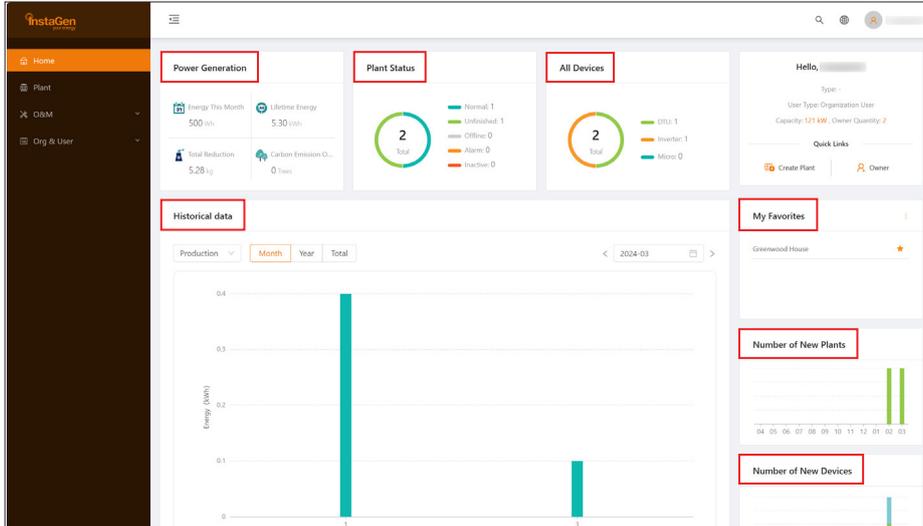


## 4. Web Page Introduction

The menu bar shows the main functions of Instagen Cloud, so the user can select the corresponding pages and perform corresponding operations.

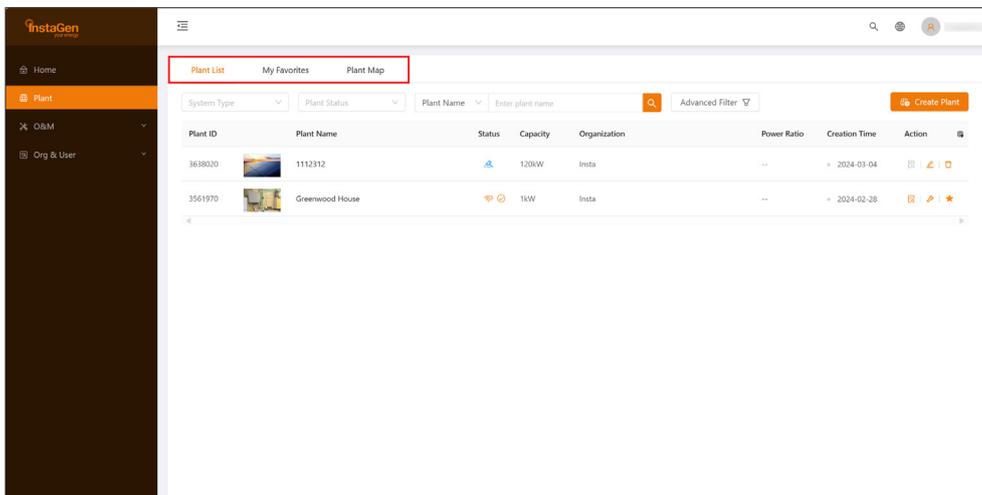
### 4.1 Home Page

The Home page includes the power generation, plant status, all devices, historical data, number of new plants, number of new devices, and your favorites.



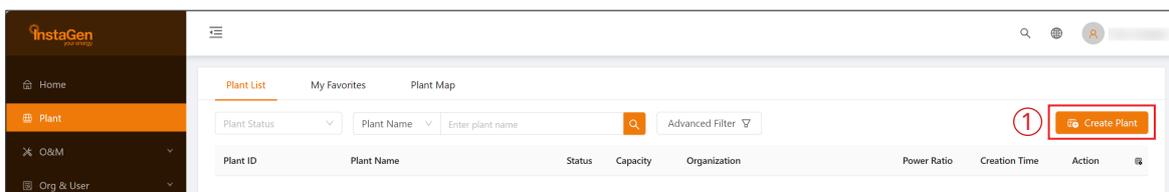
### 4.2 Plant Page

The Plant page includes the plant list, your favorites, and the plant map.



#### 4.2.1 Create a Plant

a. Click "Create Plant", fill in the basic information, and then click "Next".



\* Plant Name:

\* Plant Type: Residential Plant (Single Array)

\* Capacity:  kW

\* Location: 

Please search or mark the location of your plant on the map.

Plant Cover:   
Upload Picture

Suggested size: 1000×600. Format: JPG, JPEG, PNG, GIF. No more than 2 MB.

②

b. Click "Create Owner", fill in the owner information, and then click "Confirm".



Please bind current owners or add new owners of the plant.

③

Create Owner

\* Login Account:

\* Password:

\* Full Name:

Contact Number:

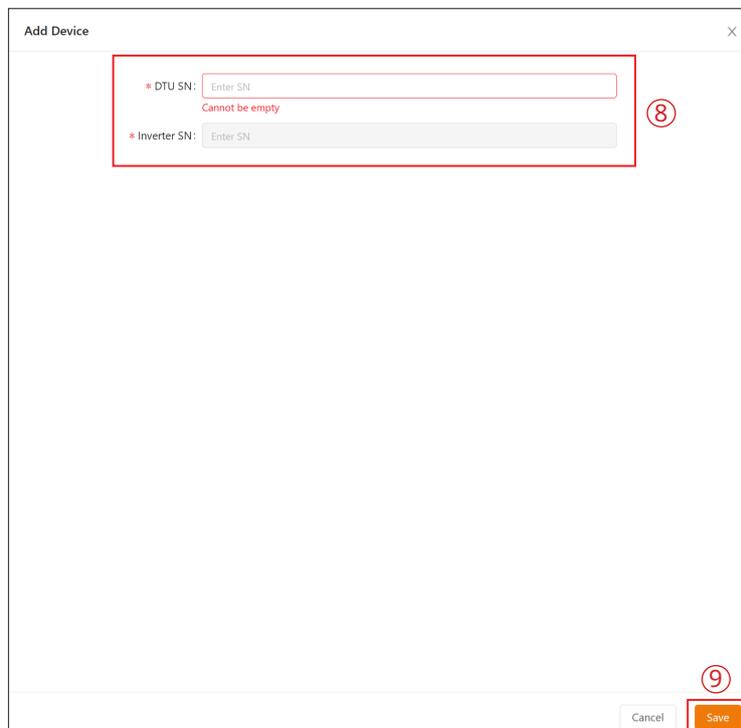
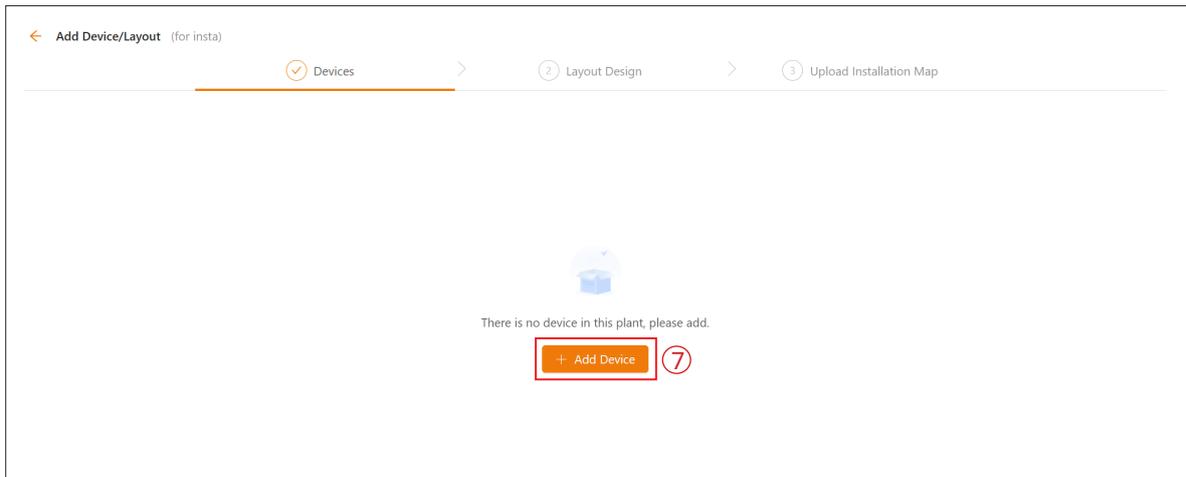
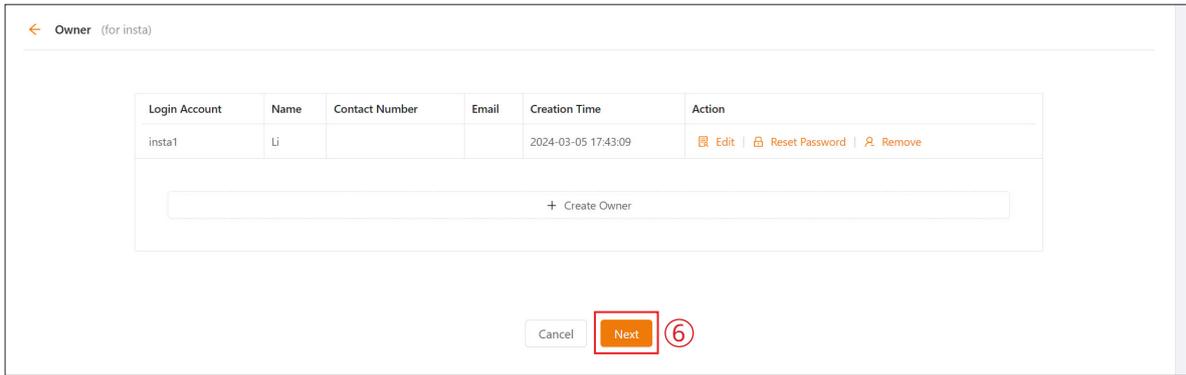
Email:

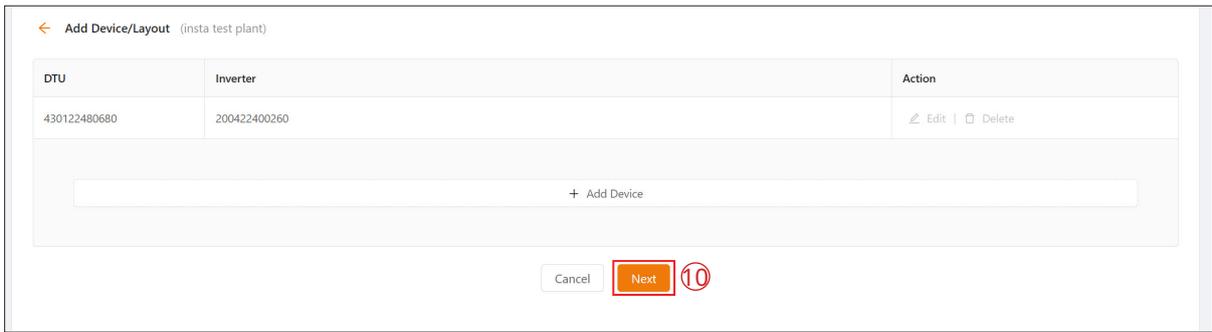
\* The email address will be used to reset the password when you forget your password. We recommend that you enter an email address.

④

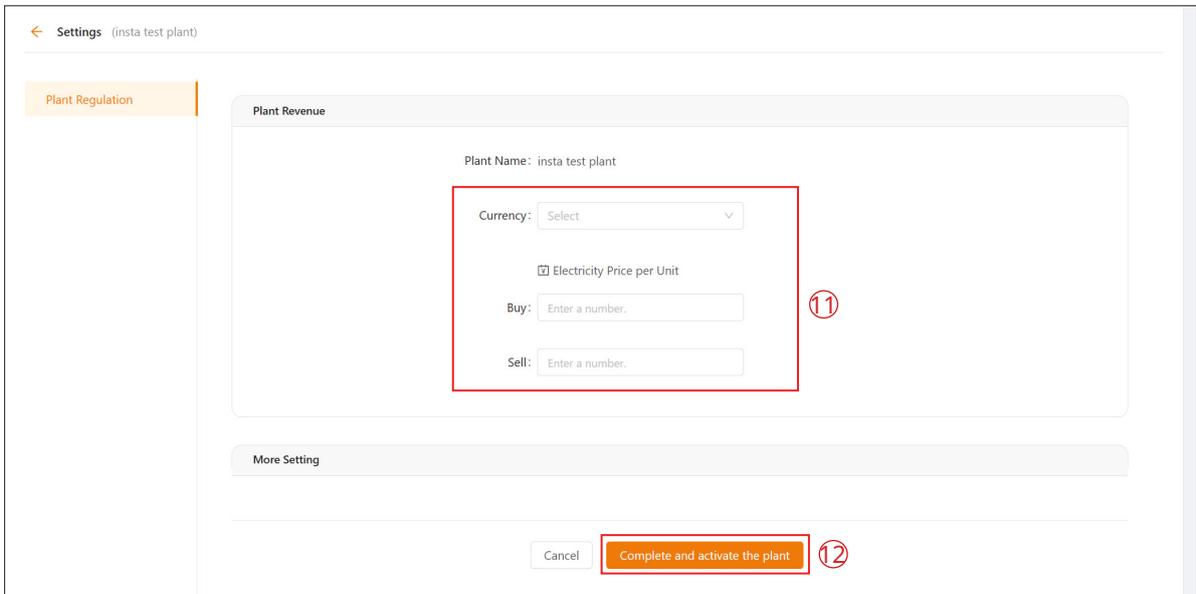
⑤

c. Click "Next → Add Device", fill in the DTU serial number, and then the inverter serial number will be automatically recognized. After that, click "Next" to go to the final step.



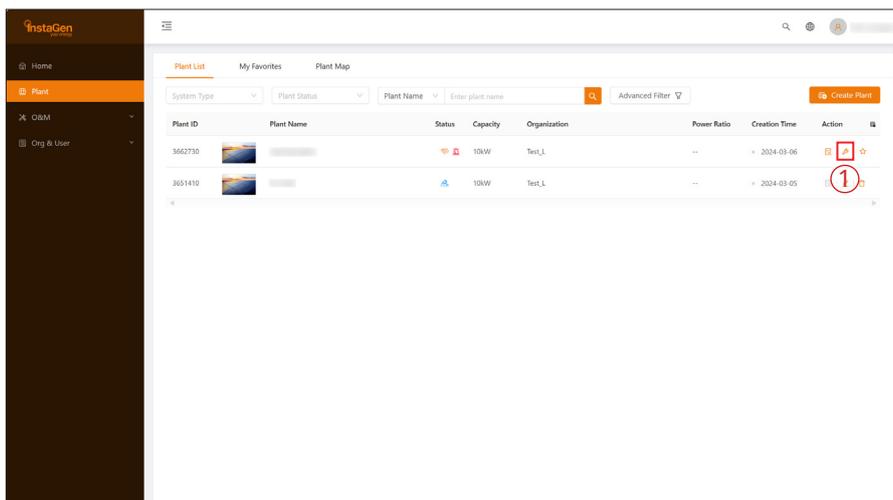


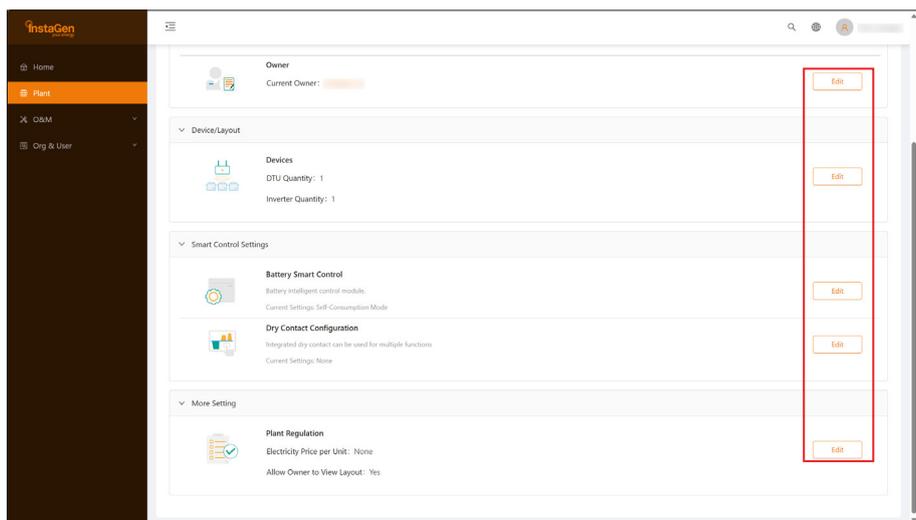
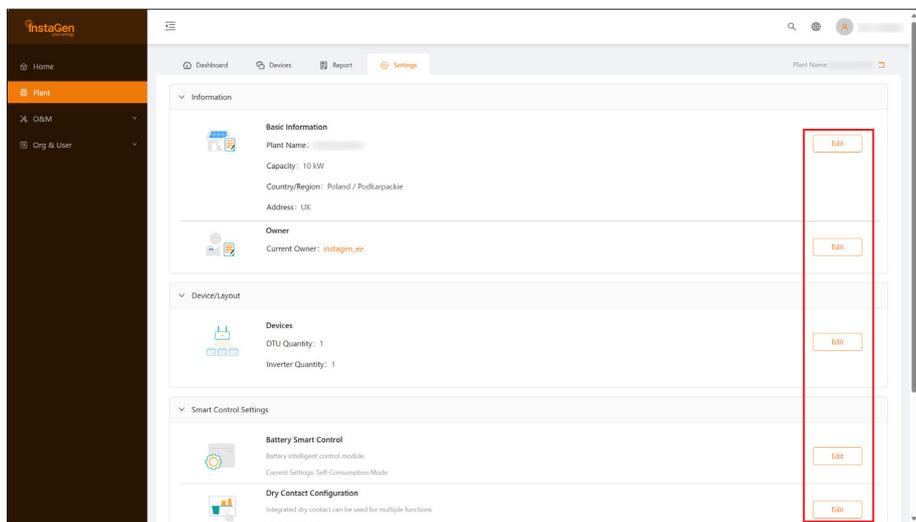
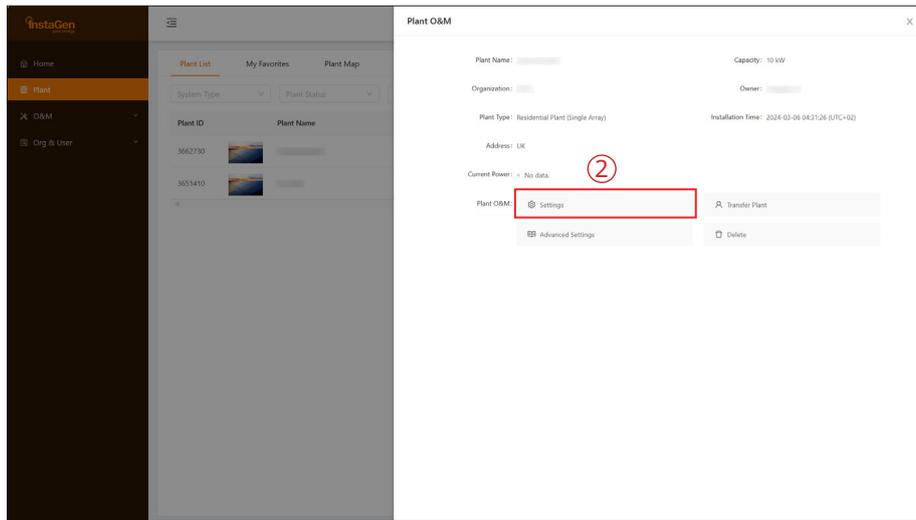
d. Fill in the plant regulation information and click “Complete and activate the plant” to finish the plant creation.



### 4.2.2 Edit Plant Basic Information

You can directly choose the plant you want to edit, or search it according to device name/ID, click the “Settings” button on the left side of the Plant O&M, and then edit the information you want to change.

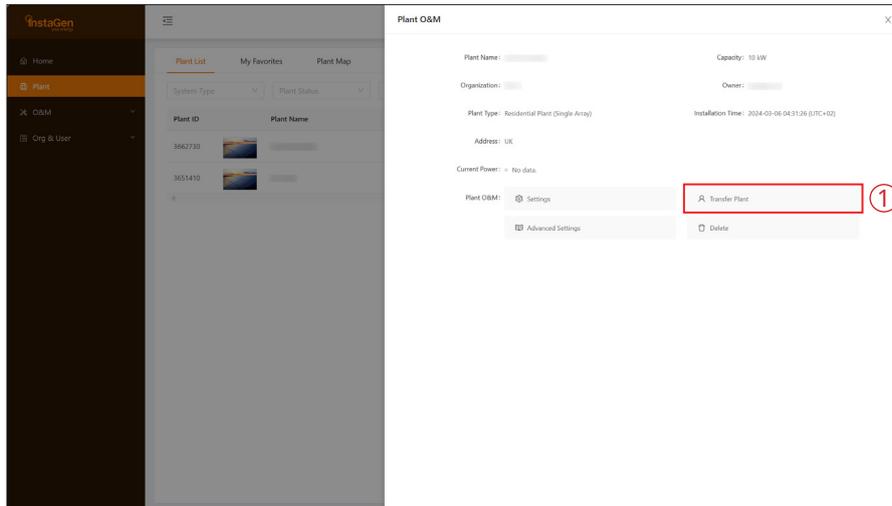




\* For details of Smart Control Settings, please refer to [Chapter 5](#).

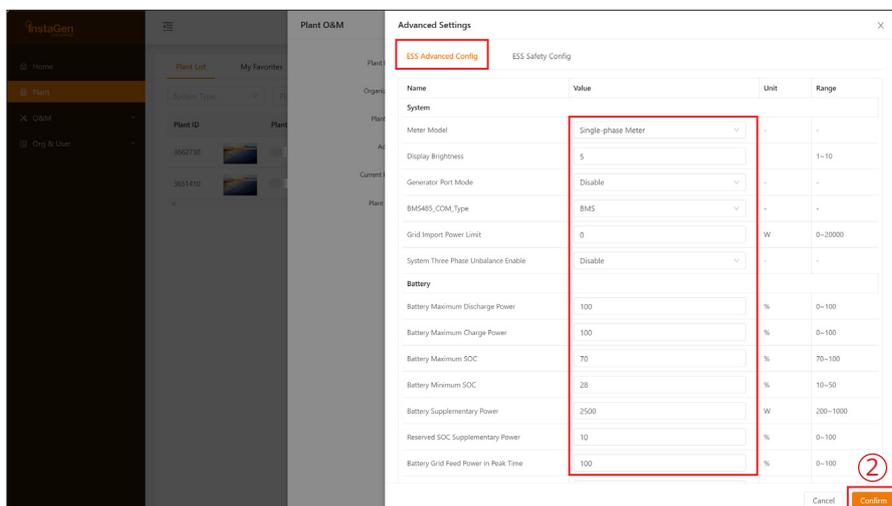
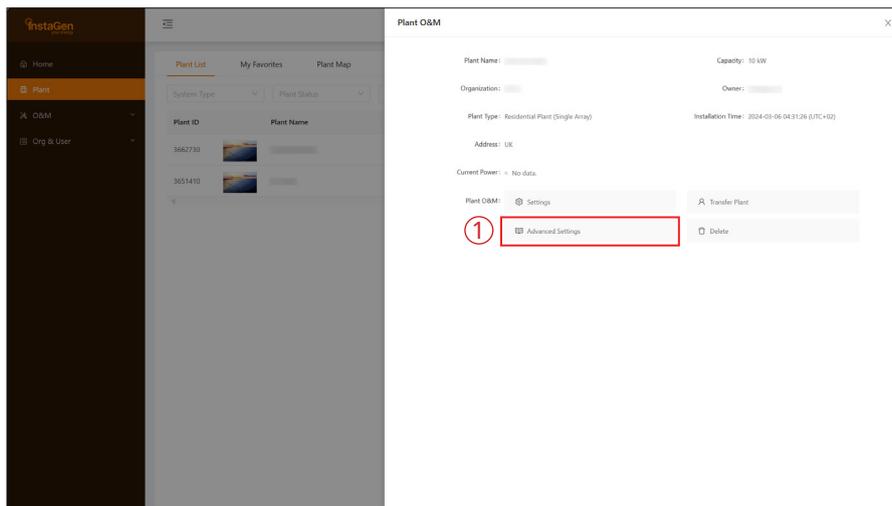
### 4.2.3 Transfer a Plant to Another Organization

Select "O&M" on the right side of the plant list, click the "Transfer Plant" button, choose the new organization that you want to transfer to, and then click "Confirm".

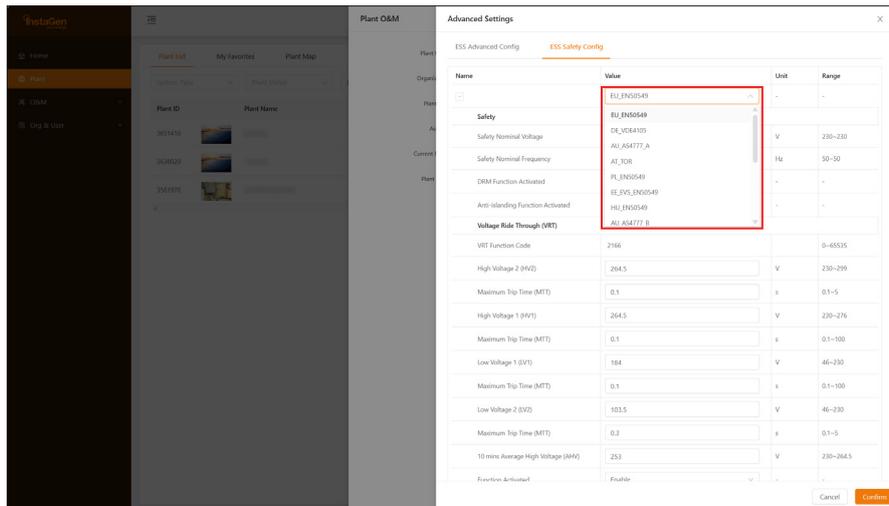


### 4.2.4 Update the Profile of Inverter

Choose the plant of which you want to update the profile, and then click the "Advanced Settings" button on the left side of the Plant O&M. You can change the parameters within a certain range, and then click "Confirm".

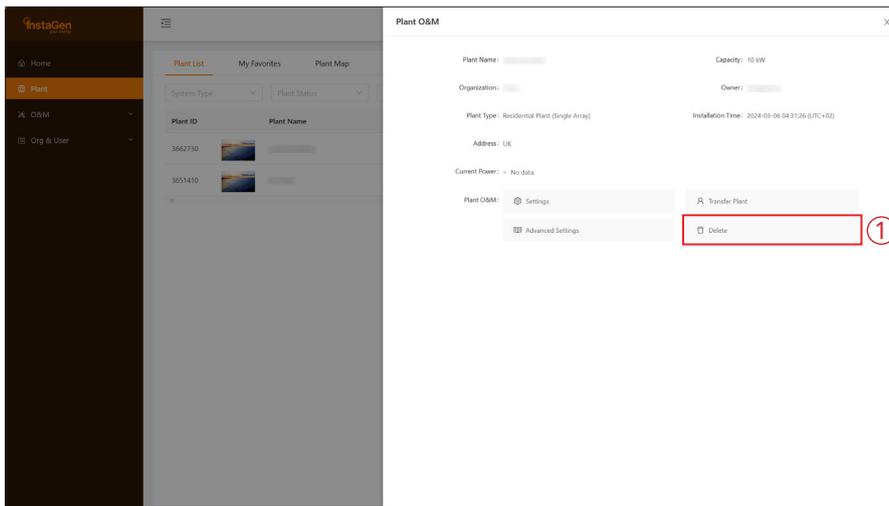


When ESS Safety Config is performed, please first choose the corresponding grid code in your region. In other regions, you can adjust parameters in accordance with local grid standards.



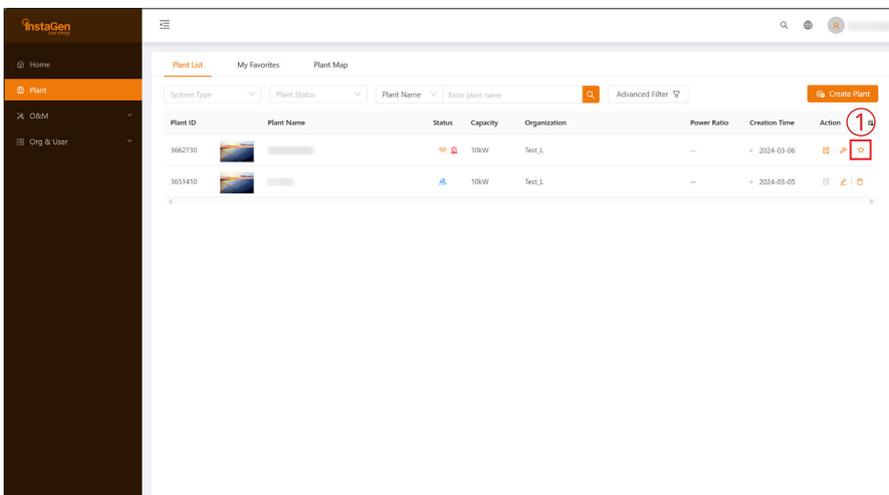
### 4.2.5 Delete a Plant

Choose the plant you want to delete, and then click the “Delete” button on the left side of the Plant O&M. To delete a plant, you will need to first delete all devices under this plant.



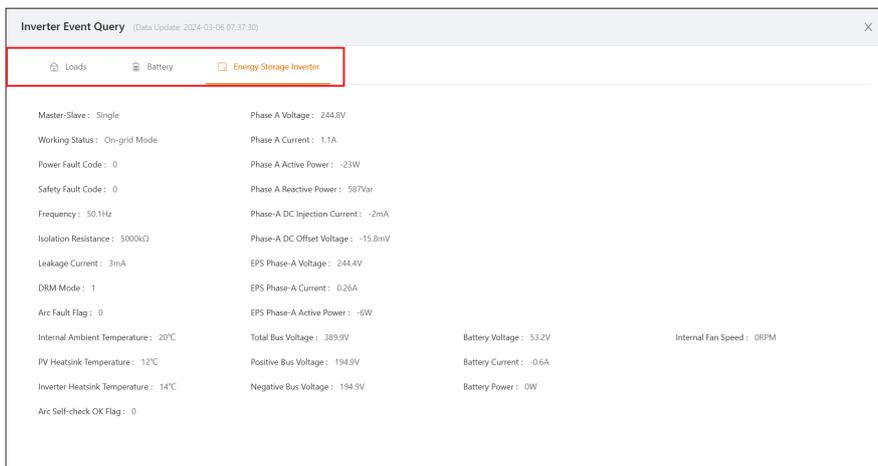
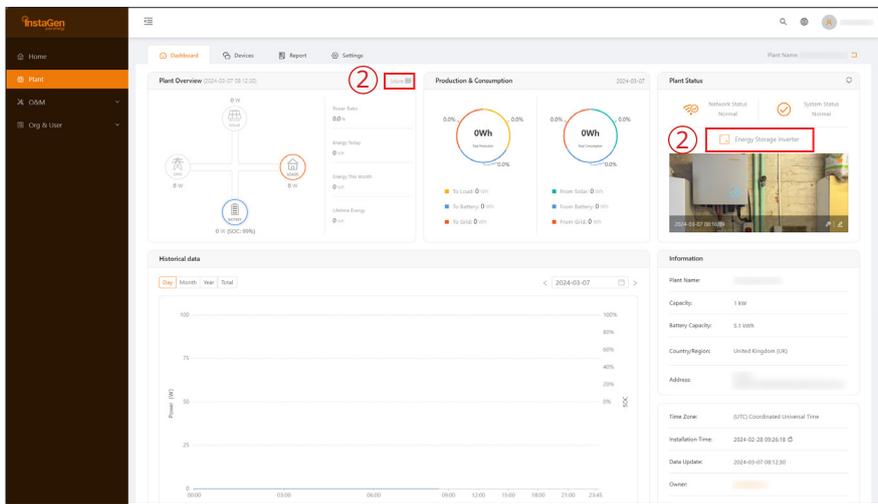
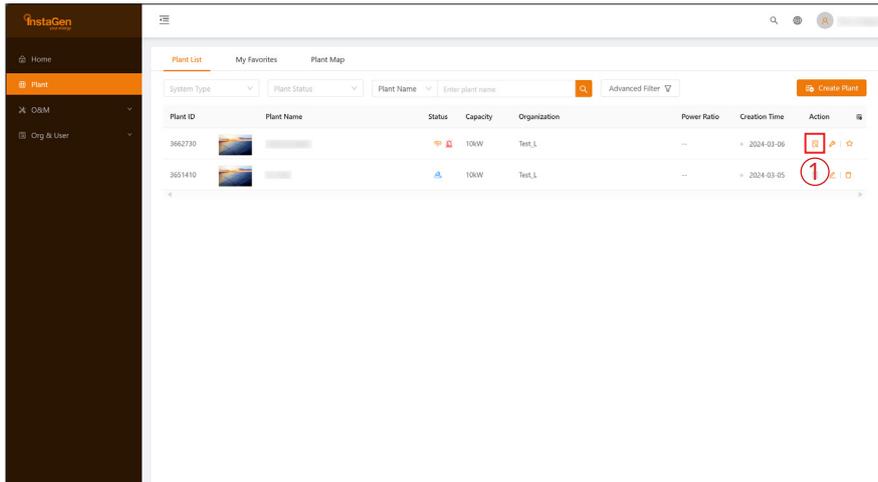
### 4.2.6 Add a Plant to Favorites

Choose the plant that you want to add to your favorites and click “Favorite”.



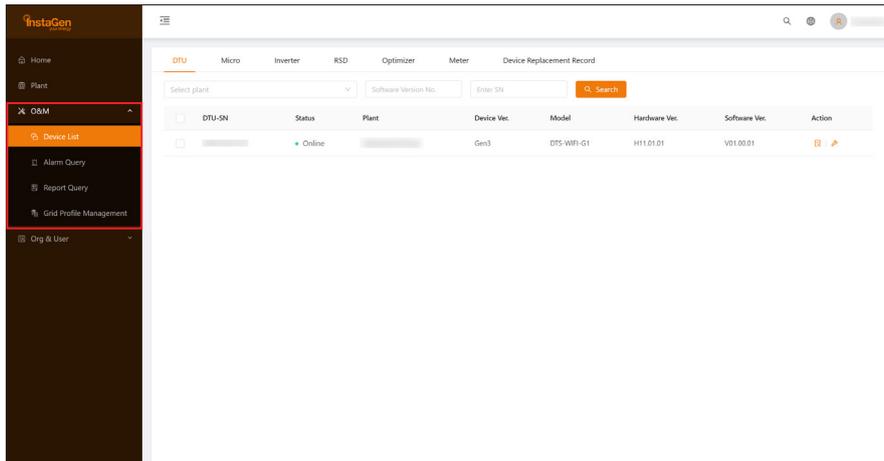
### 4.2.7 Check the Various Data of Device

Choose the plant, select "View", and click "More" or "Energy Storage Inverter".



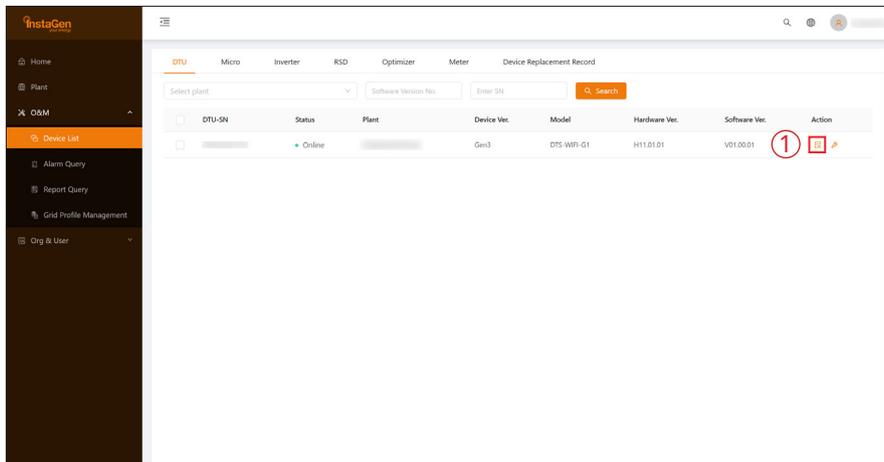
### 4.3 O&M

The O&M page includes device list, alarm query, report query, and grid profile management.



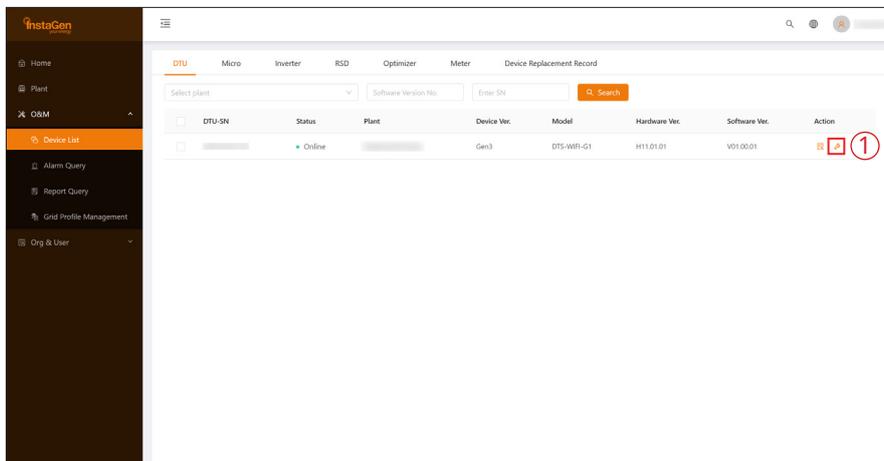
#### 4.3.1 Device Information Query

Click "Device List → DTU", and then click "View" to view device details.



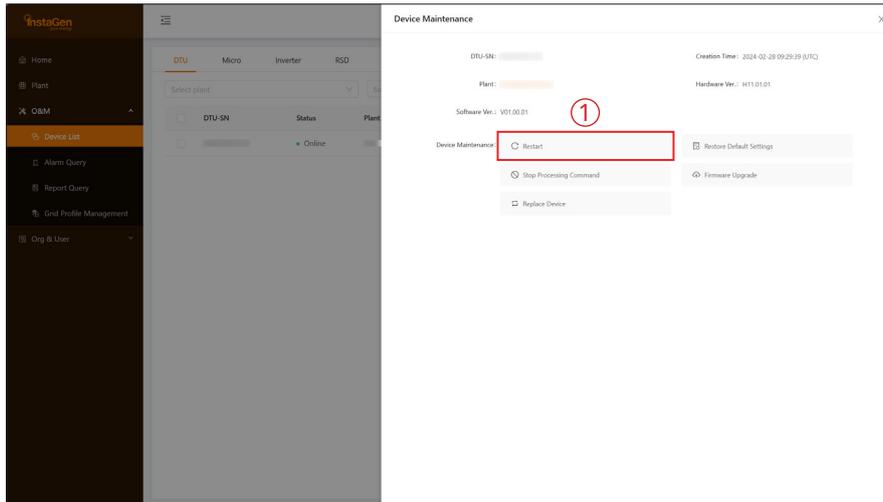
#### 4.3.2 DTU Maintenance

Click "Device List → DTU", choose the DTU SN and click "Device Maintenance".



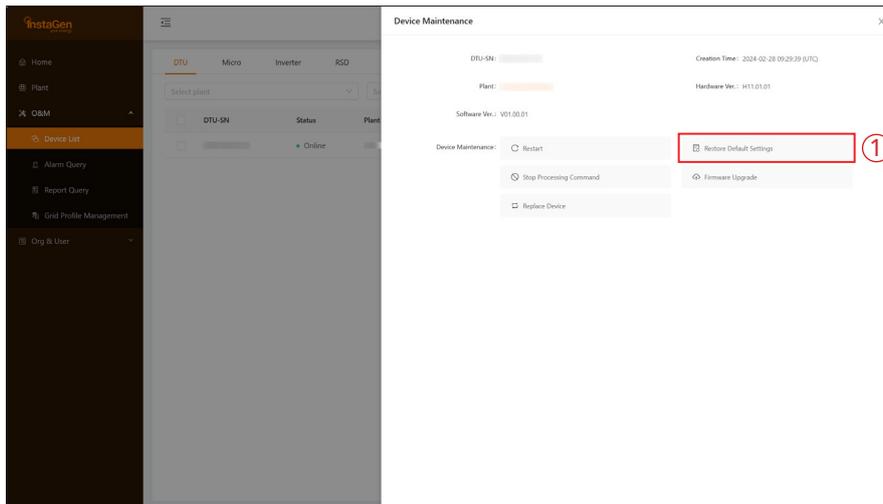
### 4.3.2.1 Restart the DTU

Click “Device List → DTU”, choose the DTU SN, and then click “Device Maintenance → Restart”.



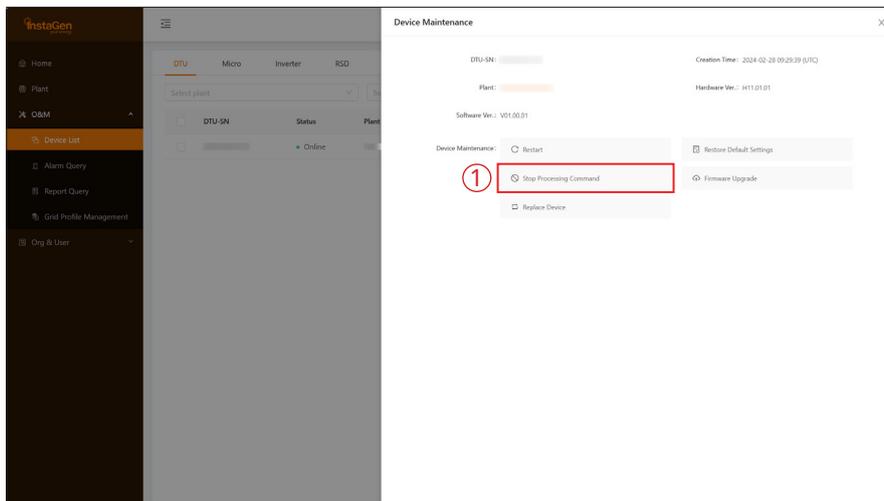
### 4.3.2.2 Restore the DTU Default Settings

Click “Device List → DTU”, choose the DTU SN, and then click “Device Maintenance → Restore Default Settings”.



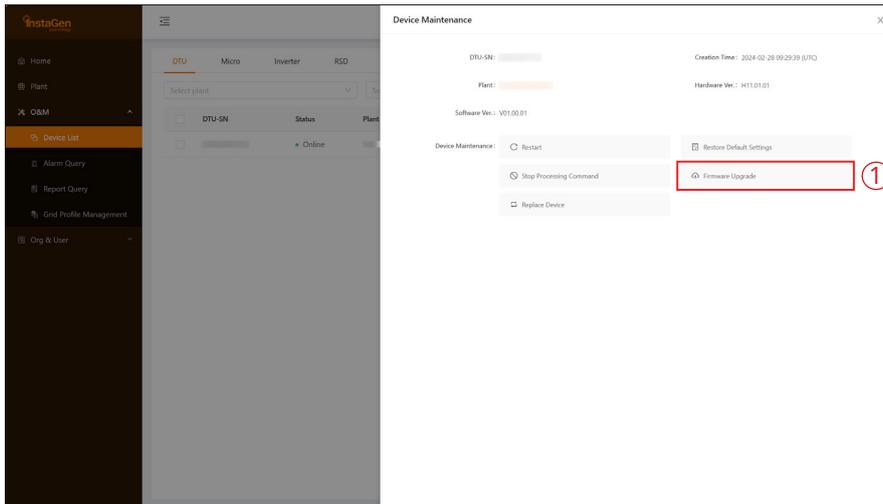
### 4.3.2.3 Stop the Processing Command of DTU

Click “Device List → DTU”, choose the DTU SN, and then click “Device Maintenance → Stop Processing Command”.



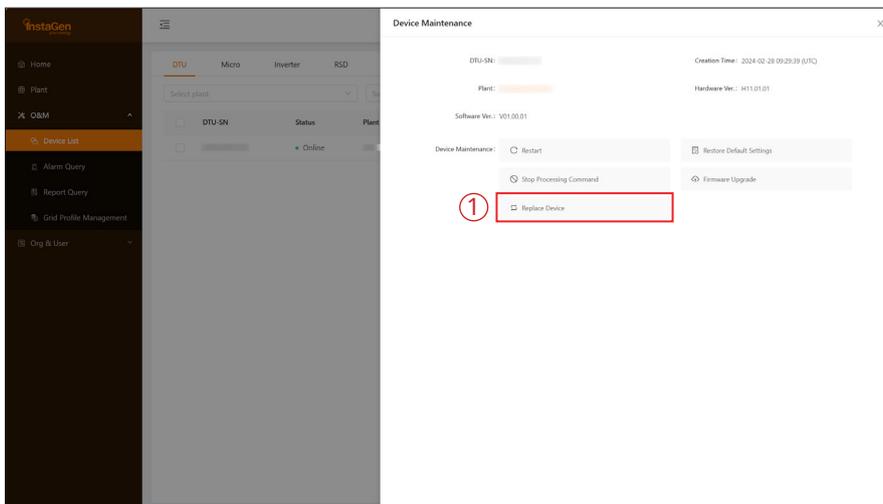
### 4.3.2.4 Upgrade the DTU Firmware

Click "Device List → DTU", choose the DTU SN, and then click "Device Maintenance → Firmware Upgrade".



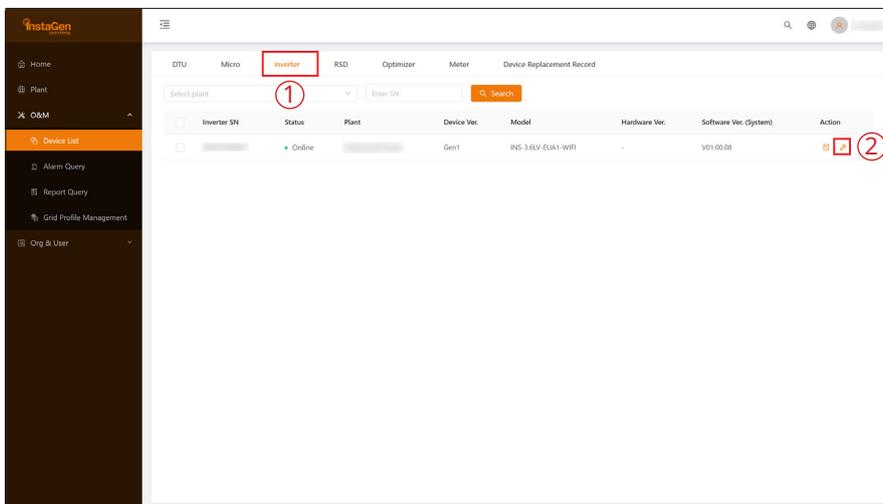
### 4.3.2.5 Replace the DTU

Click "Device List → DTU", choose the DTU SN, and then click "Device Maintenance → Replace Device".



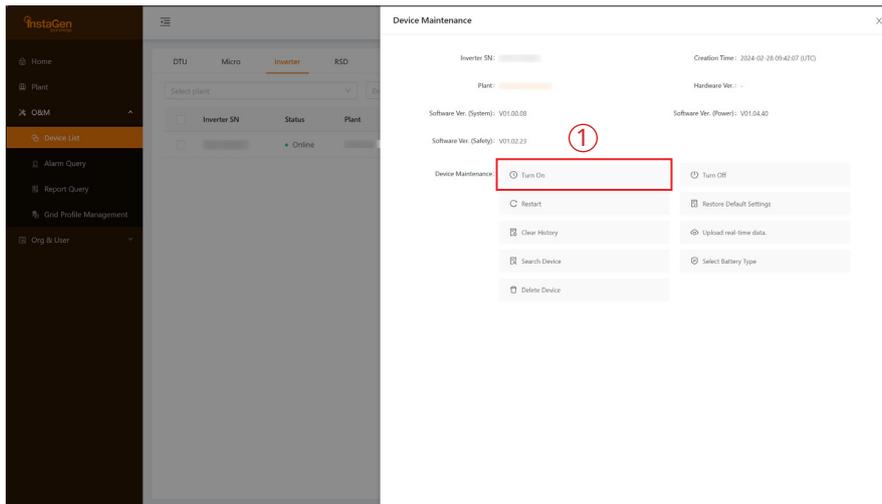
### 4.3.3 Inverter Maintenance

Click "Device List → Inverter", choose the Inverter SN, and click "Device Maintenance".



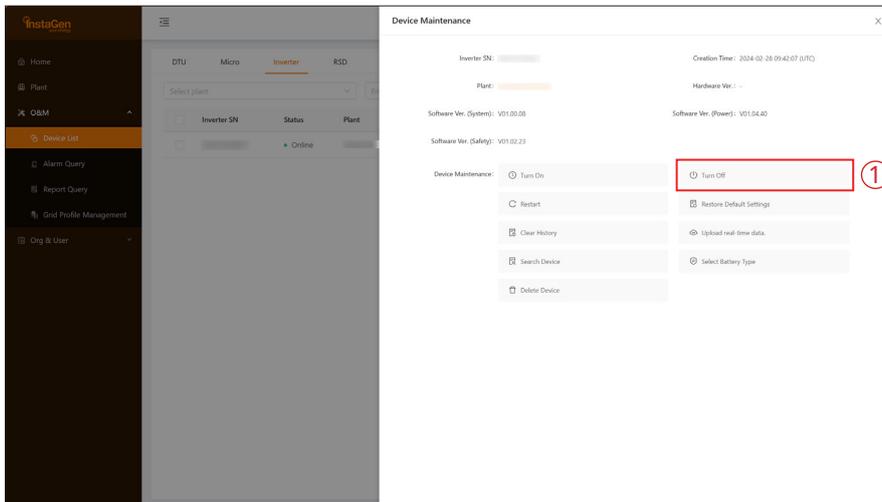
### 4.3.3.1 Turn on the Inverter

Click "Device List → Inverter", choose the Inverter SN, and then click "Device Maintenance → Turn On".



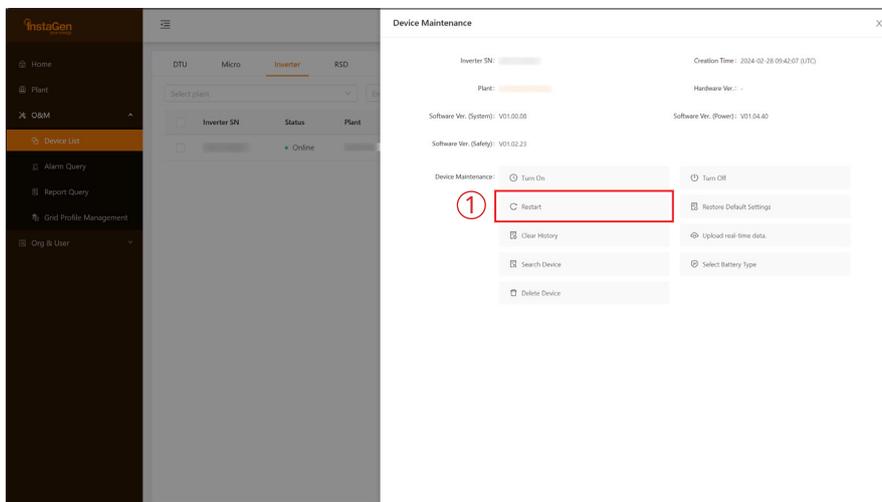
### 4.3.3.2 Turn off the Inverter

Click "Device List → Inverter", choose the Inverter SN, and then click "Device Maintenance → Turn Off".



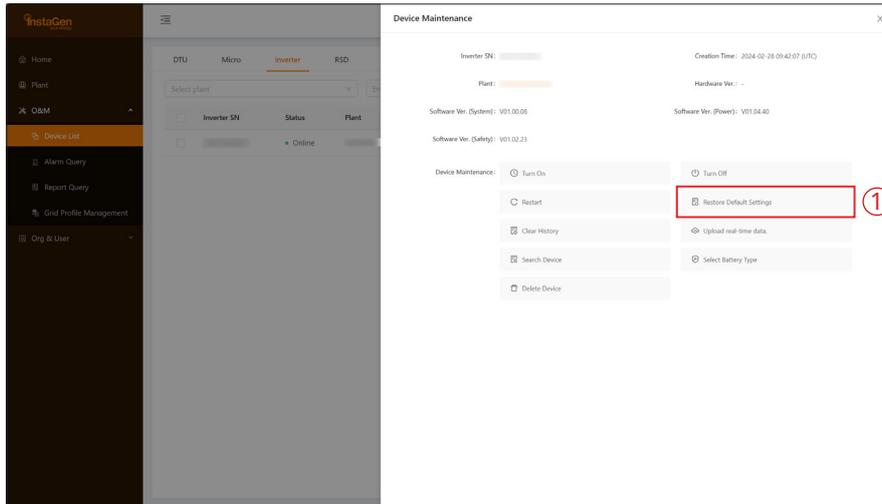
### 4.3.3.3 Restart the Inverter

Click "Device List → Inverter", choose the Inverter SN, and then click "Device Maintenance → Restart".



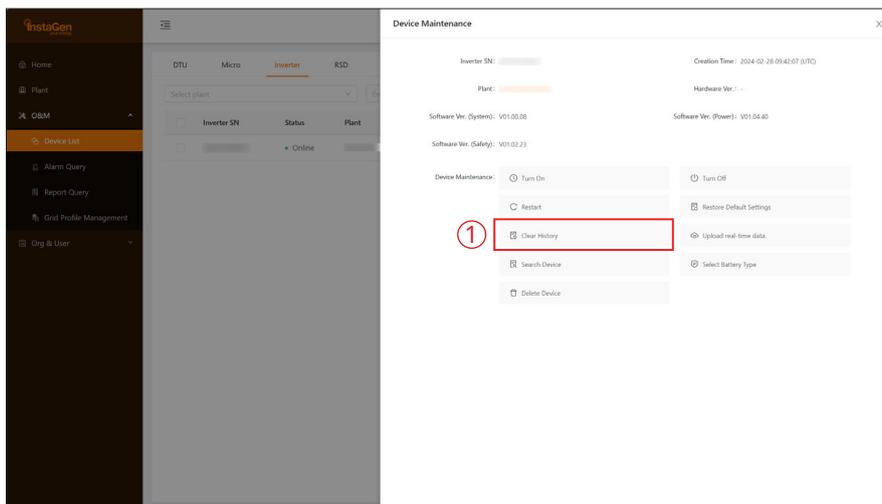
### 4.3.3.4 Restore the Inverter Default Settings

Click “Device List → Inverter”, choose the Inverter SN, and then click “Device Maintenance → Restore Default Settings”.



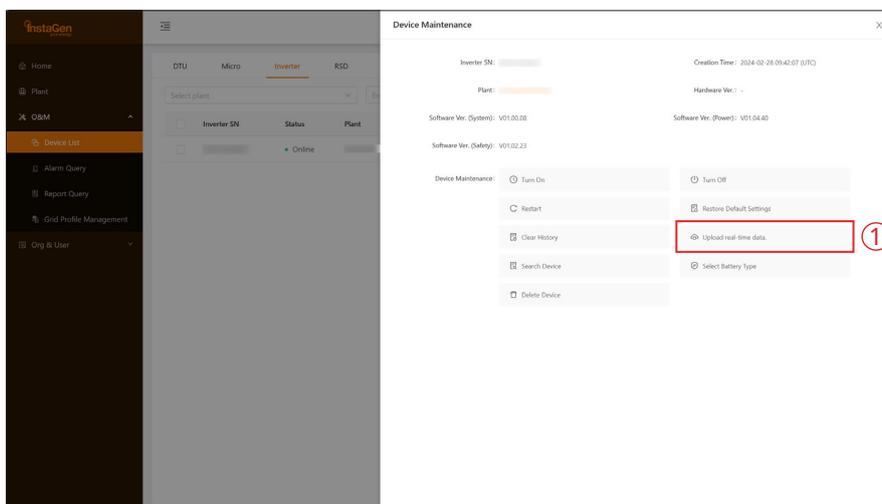
### 4.3.3.5 Clear the History of Inverter

Click “Device List → Inverter”, choose the Inverter SN, and then click “Device Maintenance → Clear History”.



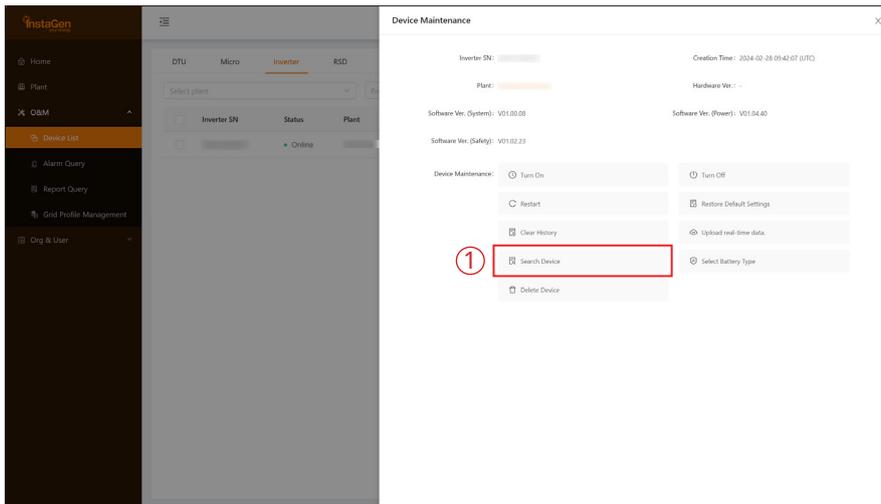
### 4.3.3.6 Upload the Real-time Data

Click “Device List → Inverter”, choose the Inverter SN, and then click “Device Maintenance → Upload real-time data”.



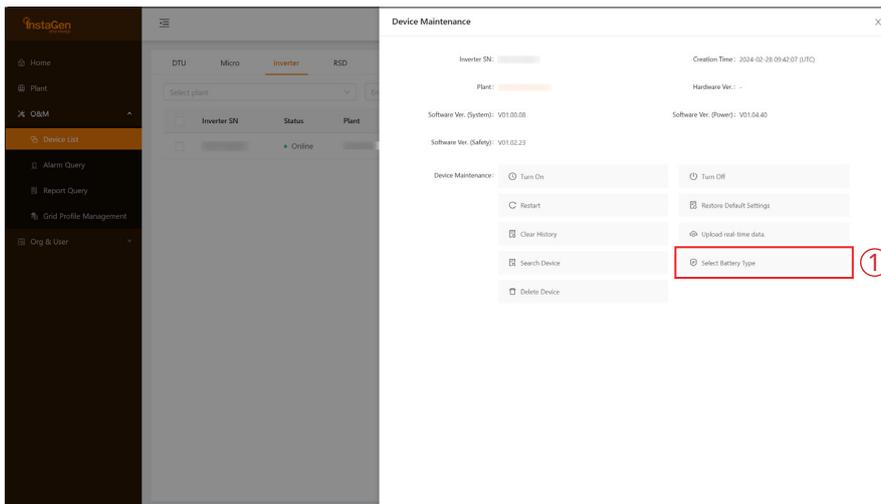
### 4.3.3.7 Search the Device

Click "Device List → Inverter", choose the Inverter SN, and then click "Device Maintenance → Search Device".



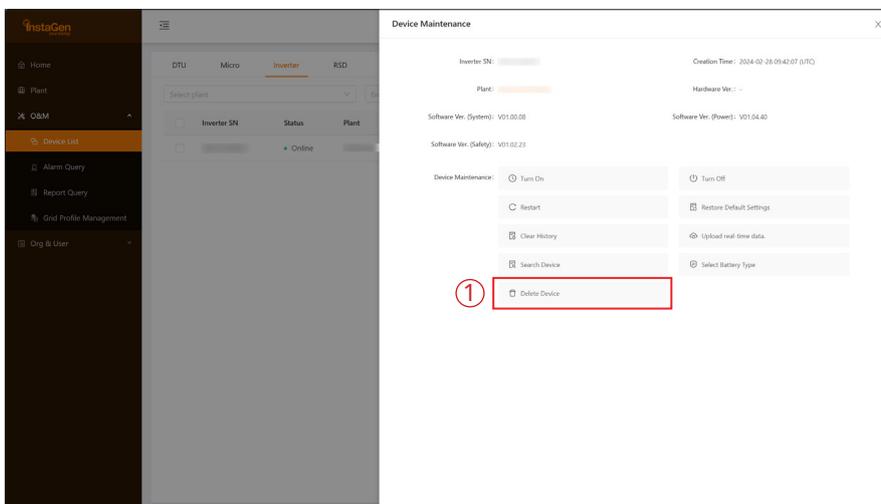
### 4.3.3.8 Select the Battery Type

Click "Device List → Inverter", choose the Inverter SN, and then click "Device Maintenance → Select Battery Type".



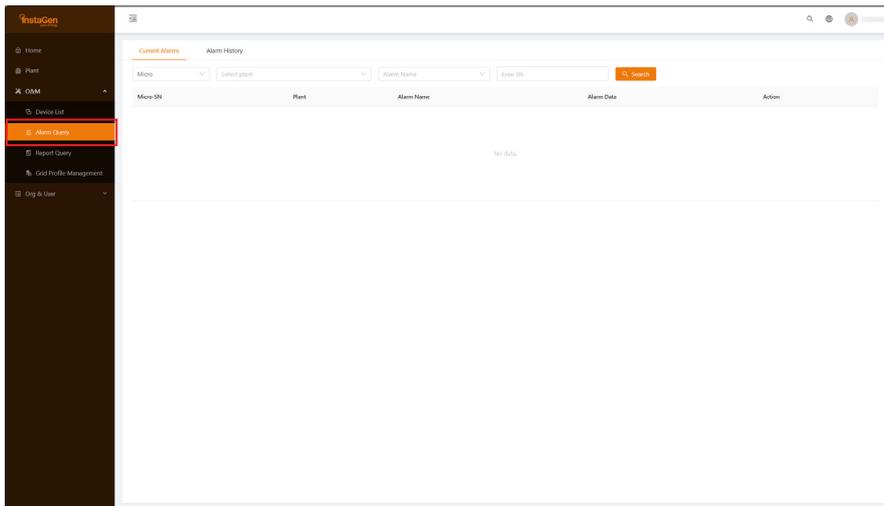
### 4.3.3.9 Delete the Device

Click "Device List → Inverter", choose the Inverter SN, and then click "Device Maintenance → Delete Device".



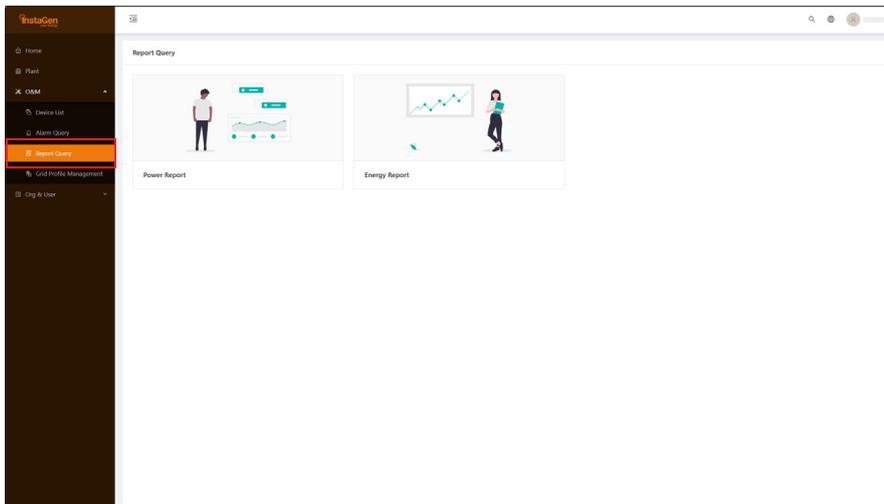
### 4.3.4 Alarm Query

Click "Alarm Query" to check the current alarms and alarm history.



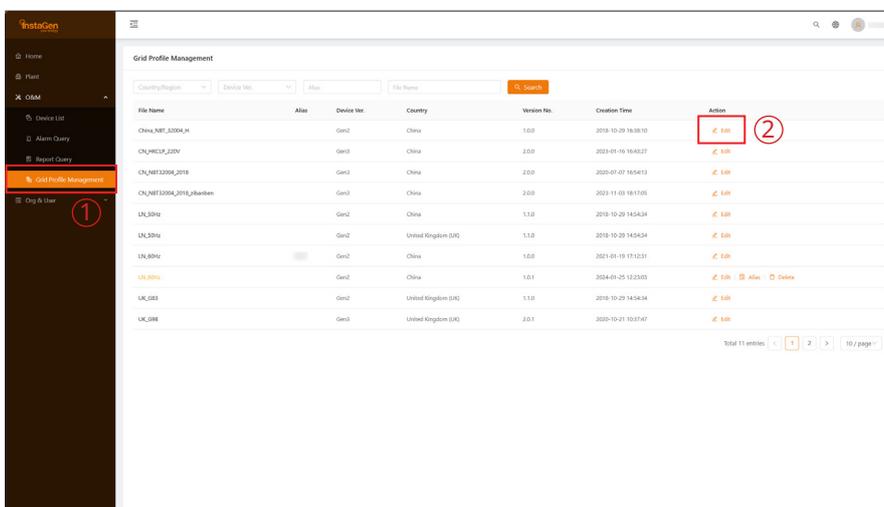
### 4.3.5 Report Query

Click "Report Query" to check the power report and energy report.



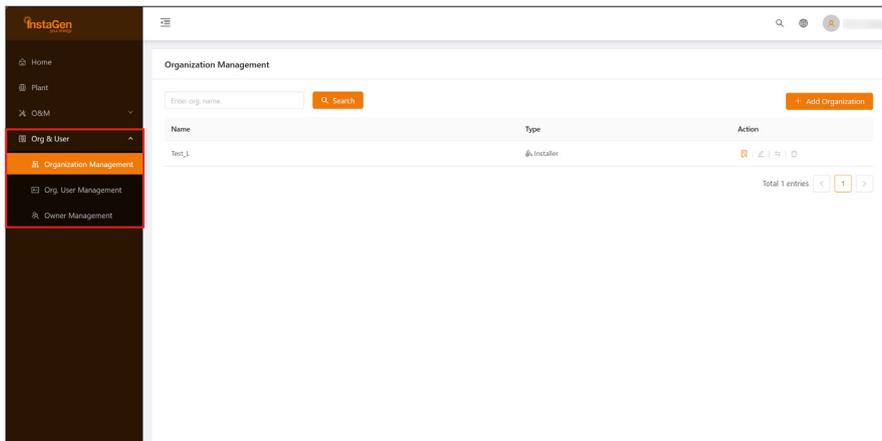
### 4.3.6 Grid Profile Management

Click "Grid Profile Management" to check the grid profile. And you can click "Edit" to edit the grid profile.



## 4.4 Org & User

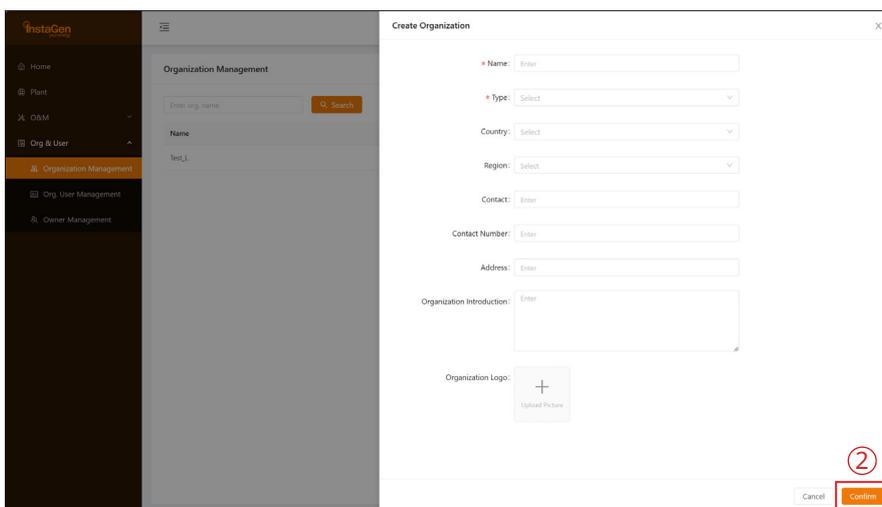
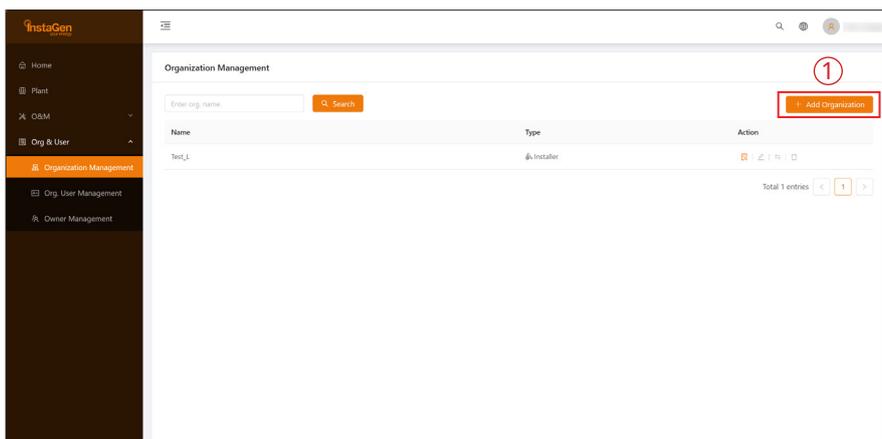
The Org & User page includes organization management, Org. User management and owner management.



### 4.4.1 Organization Management

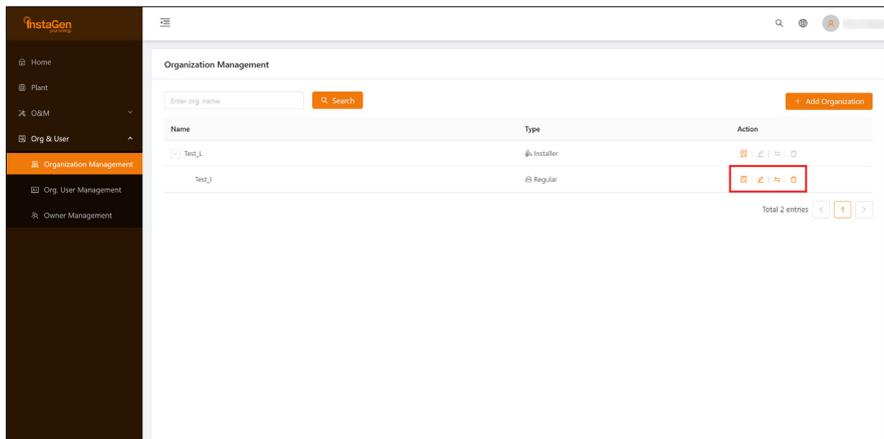
#### 4.4.1.1 Create Organization

Click "Add Organization", fill in the details of the organization user, and then click "Confirm" to complete the account creation.



### 4.4.1.2 Organization Management

In this page, you can check, edit, transfer, and delete the organization.



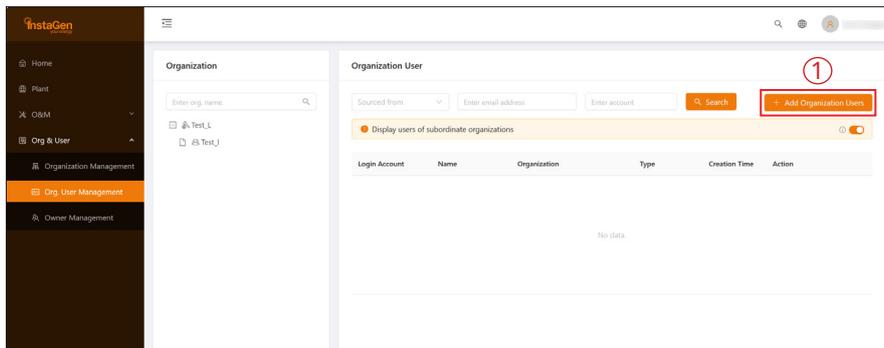
**Note:**

The PV plant cannot be transferred when one owner account is used by multiple PV plants. If one of the PV plants will be transferred, please first remove the owner account from other PV plants.

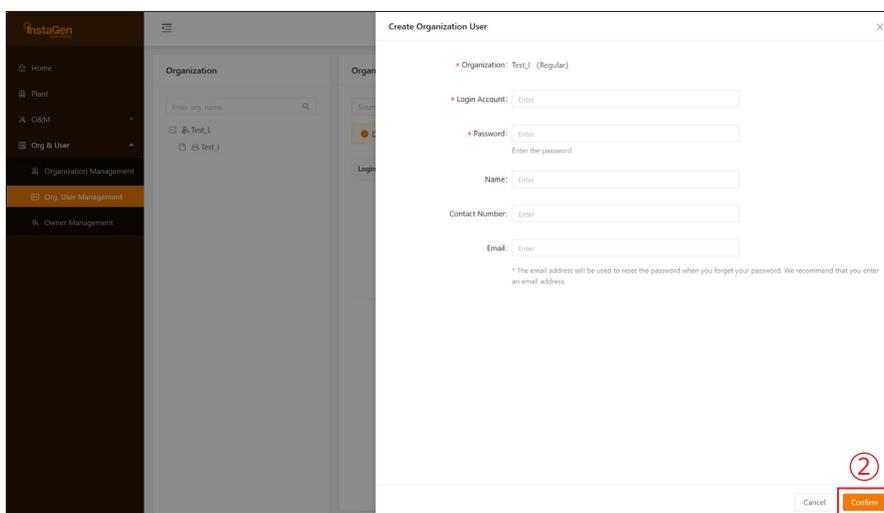
### 4.4.2 Org. User Management

In this page, you can add organization users:

- a. Select "Org. User Management", select and click the organization name you just created on the left, and then click "Add Organization Users".

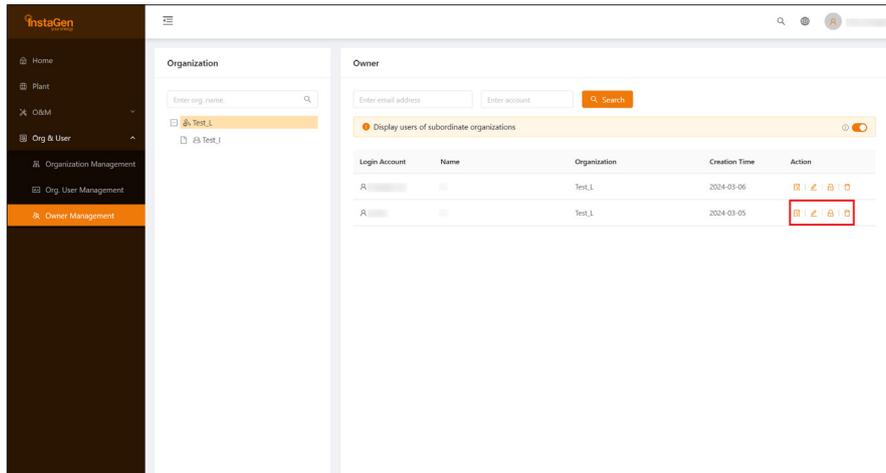


- b. Fill in the details of the organization user and click "Confirm" to complete the account creation.



### 4.4.3 Owner Management

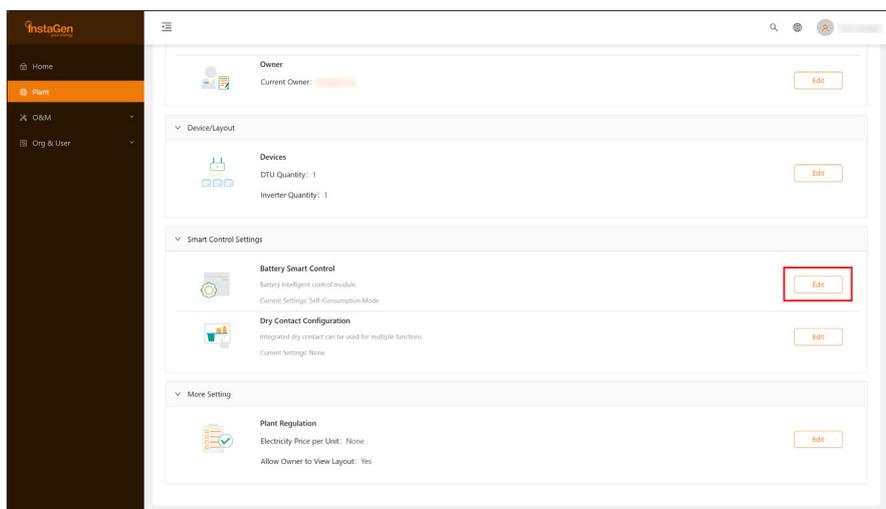
In this page, you can check and edit the account information, reset the account password, and delete the account.



## 5. Smart Control Settings

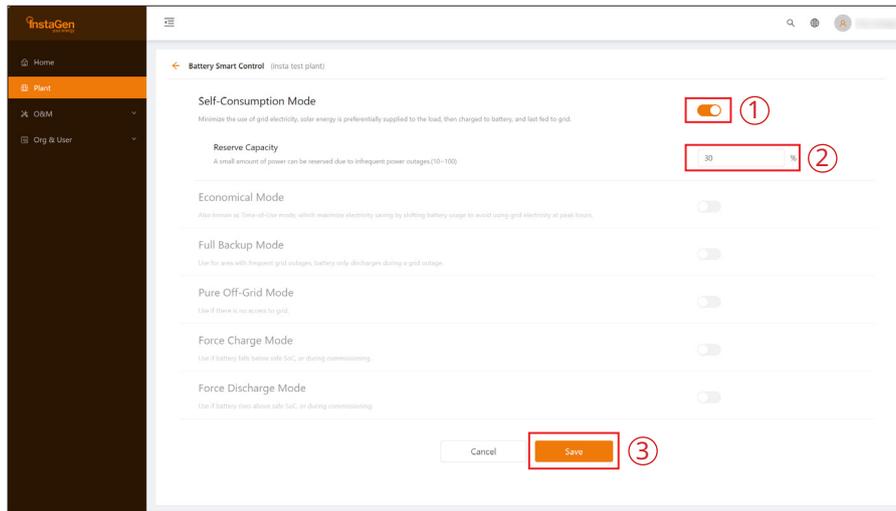
### 5.1 Battery Smart Control

Choose the plant where you want to change the system mode and click “Settings”. Click the “Edit” button of Battery Smart Control under Smart Control Settings. Only one control mode can be selected at a time.



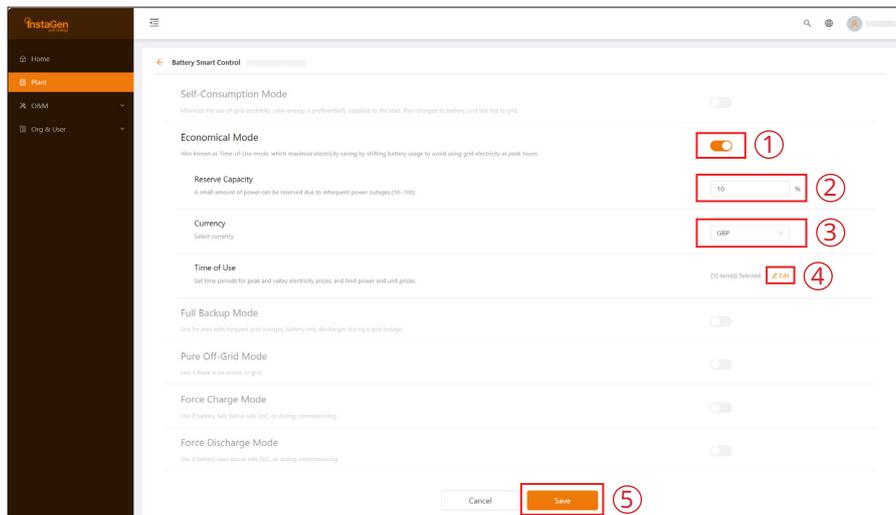
#### 5.1.1 Self-consumption Mode

In the daytime, solar energy supports the loads first, and surplus energy is stored in the battery. When the battery is fully charged or reaches the maximum charge power, the surplus energy is fed into the grid (or limited if required). At night, the battery discharges for the loads first, and the grid will supply the loads once the battery power is not enough. In this mode, the battery cannot be charged from the grid at night. The self-consumption mode can reduce the use of grid power. Solar energy is preferentially supplied to the load, charged to the battery, and fed into the grid last. You can set reserve capacity within a certain range in the case of infrequent power outages, and then click “Save”.



### 5.1.2 Economical Mode

In this mode, battery charging and discharging periods need to be defined. Meanwhile, the battery can be forced to charge from the grid during the preset charging time. For instance, the battery could be charged or discharged according to valley or peak electricity prices. You can set reserve capacity within a certain range in the case of infrequent power outages and select the type of currency you need. Meanwhile, You can set different time periods to be more flexible to save costs of electricity. Click "Edit" to set the time period for peak, low, and partial peak grid prices in different seasons or dates, but you can just add up to four time periods, and then click "Save".



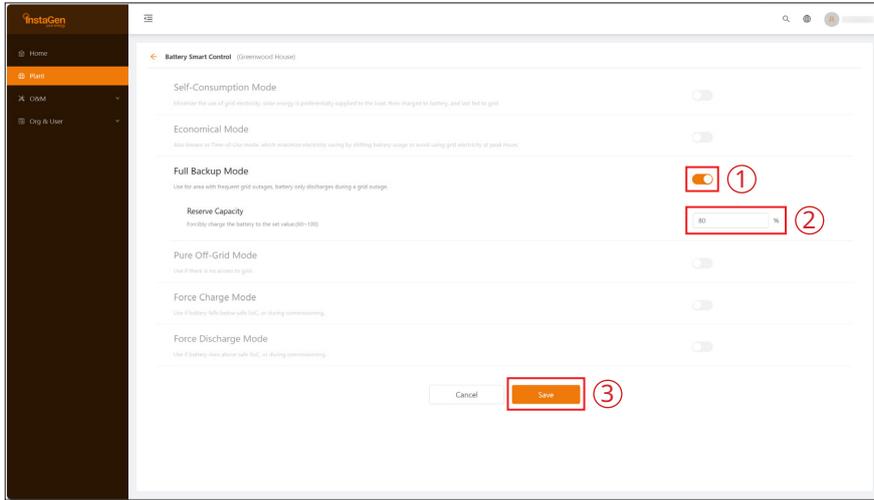
The screenshot shows a 'Time of Use' configuration window for 'Electricity rate 1'. At the top, there's a 'Select a time period' section with date pickers for '01-01' and '02-28'. Below this are two 'Time Range' sections. 'Time Range 1' includes a day selector (Mon X, Tue X, Wed X, Thu X, Fri X) and three sub-sections: 'Peak Hour' (Start: 04:31, End: 00:29, Buy: 0.28, Sell: 0.15), 'Off-Peak Hour' (Start: 00:30, End: 04:30, Buy: 0.15, Sell: 0.15), and 'Partial-Peak Hour' (Buy: Enter a number, Sell: Enter a number). 'Time Range 2' has a day selector (Sat X, Sun X) and the same three sub-sections. At the bottom, there is a '+ Add Item' button (circled 1), a 'Cancel' button, and a 'Save' button (circled 2).

If you want to delete one of the time periods, just click “delete” in the top right corner and click “Save”.

The screenshot shows a 'Time of Use' configuration window for 'Electricity rate 2'. At the top, there's a 'Select a time period' section with date pickers for 'Select date' and 'To Select date'. Below this are two 'Time Range' sections. 'Time Range 1' includes a 'Select' dropdown and three sub-sections: 'Peak Hour' (Start: Select time, End: Select time, Buy: Enter a number, Sell: Enter a number), 'Off-Peak Hour' (Start: Select time, End: Select time, Buy: Enter a number, Sell: Enter a number), and 'Partial-Peak Hour' (Buy: Enter a number, Sell: Enter a number). 'Time Range 2' has a 'Select' dropdown and the same three sub-sections. At the bottom, there is a '+ Add Item' button, a 'Cancel' button, and a 'Save' button (circled 2). A red box with a circled '1' highlights the delete icon in the top right corner.

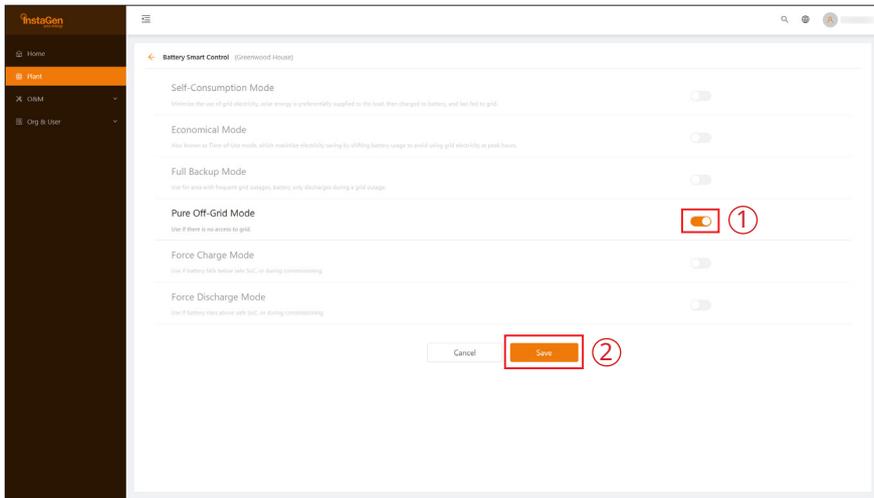
### 5.1.3 Full Backup Mode

Full backup mode can be selected when the grid frequently breaks down. The battery will be forced to charge to a set capacity so that it has enough power to support the electricity consumption in daily life when the inverter is in off-grid mode. You can also set the reserve capacity within a certain range and click "Save".



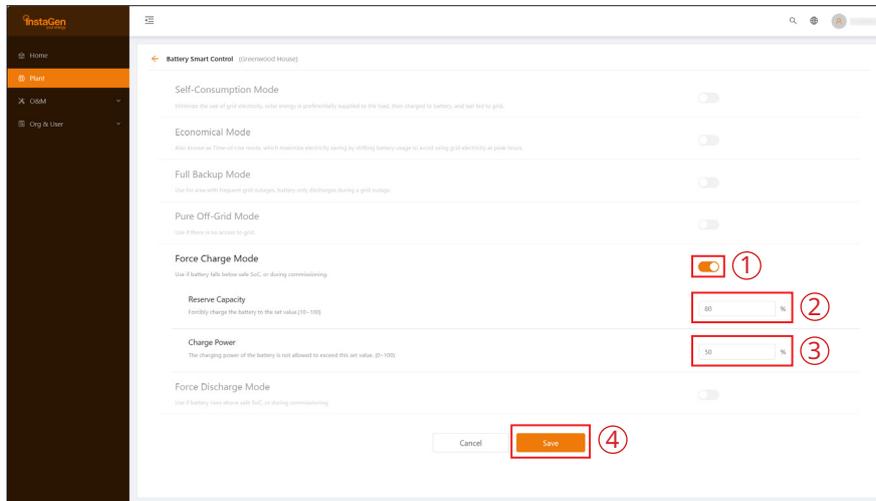
### 5.1.4 Pure Off-grid Mode

When the system is not connected to the grid, you can choose the pure off-grid mode and click "Save".



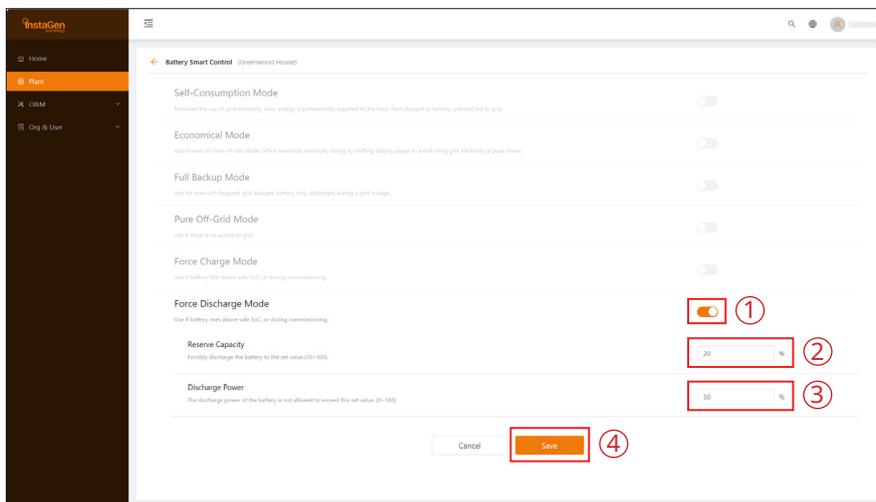
### 5.1.5 Force Charge Mode

The force charge mode can be used during the commissioning of the inverter or when the battery capacity falls below the value of safety SOC. You can set the reserve capacity within a certain range. If the battery capacity is lower than the setting, the battery will be forcibly charged. You can set the charge power of the battery if needed. Finally, save the values you have changed.



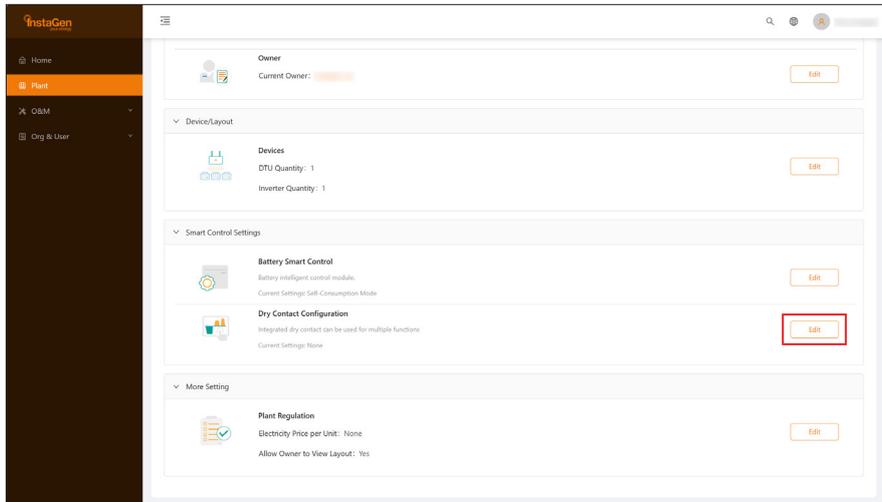
### 5.1.6 Force Discharge Mode

The force discharge mode can be used during the commissioning of the inverter or when the battery capacity rises above the value of safety SOC. You can set the reserve capacity within a certain range. If the battery capacity is higher than the setting, the battery will be forcibly discharged. You can set the discharge power of the battery if needed. Finally, save the values you have changed.



## 5.2 Dry Contact Configuration

Click the “Edit” button of Dry Contact Configuration under Smart Control Settings. Note that just one mode can be selected at a time.

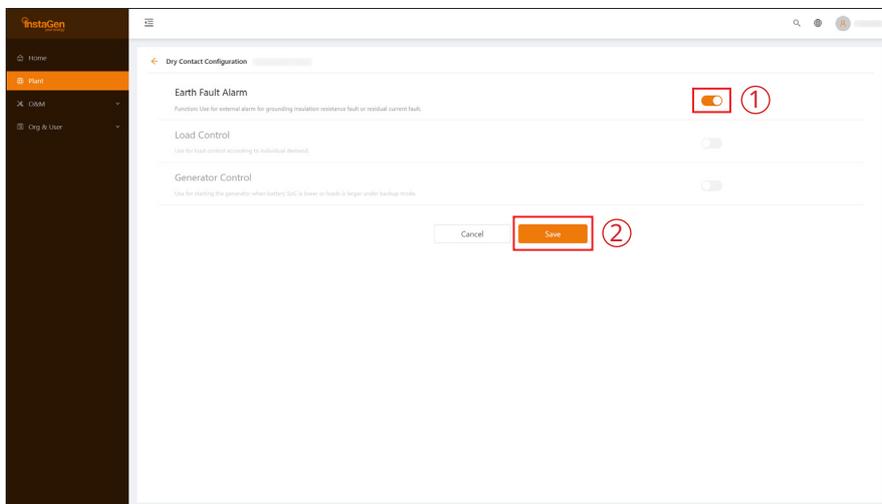


**Note:**

1. The current of the DO dry contact should not be larger than 2 A.
2. An AC contactor must be installed between the inverter and the load.
3. After the inverter is powered off, the AC contactor should be adjusted manually to control the load.

### 5.2.1 Set Earth Fault Alarm

Disable the external alarm caused by grounding insulation resistance fault or residual current fault when the load is connected.

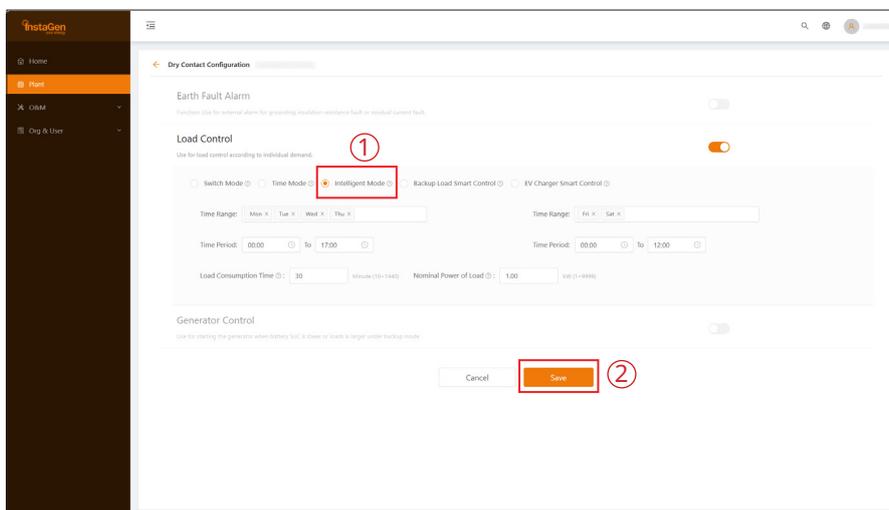
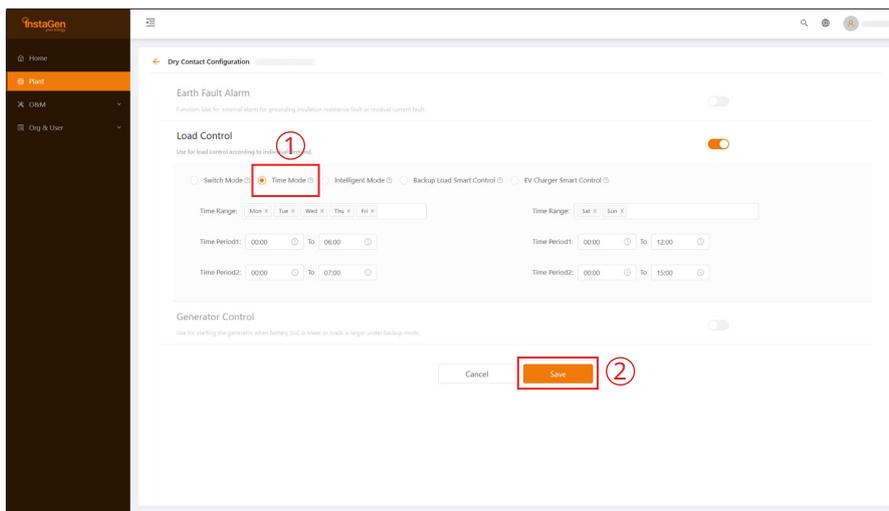
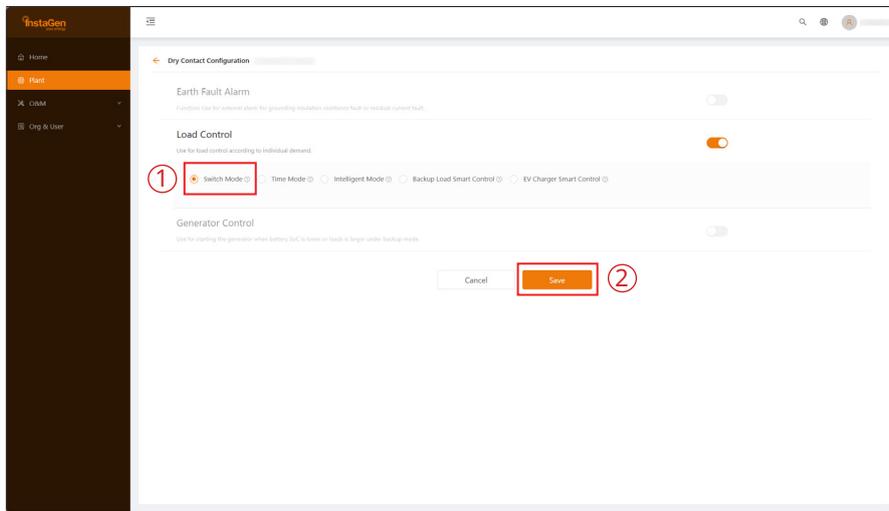


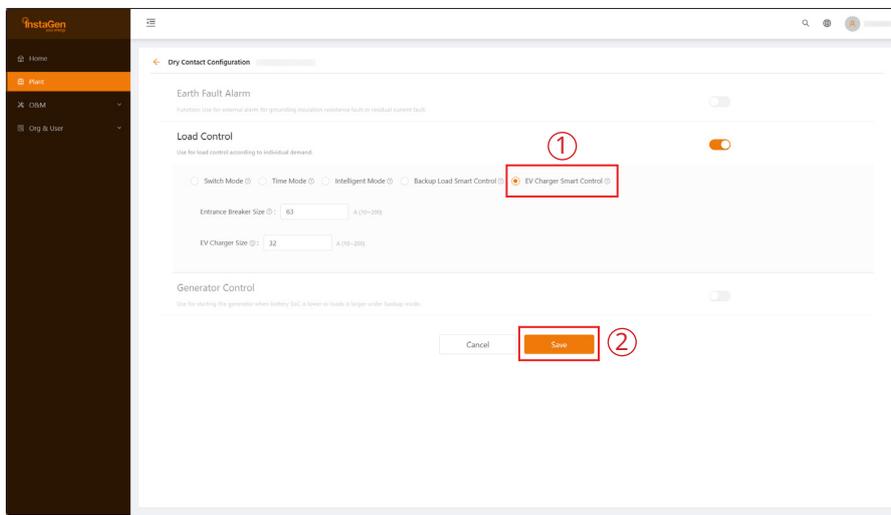
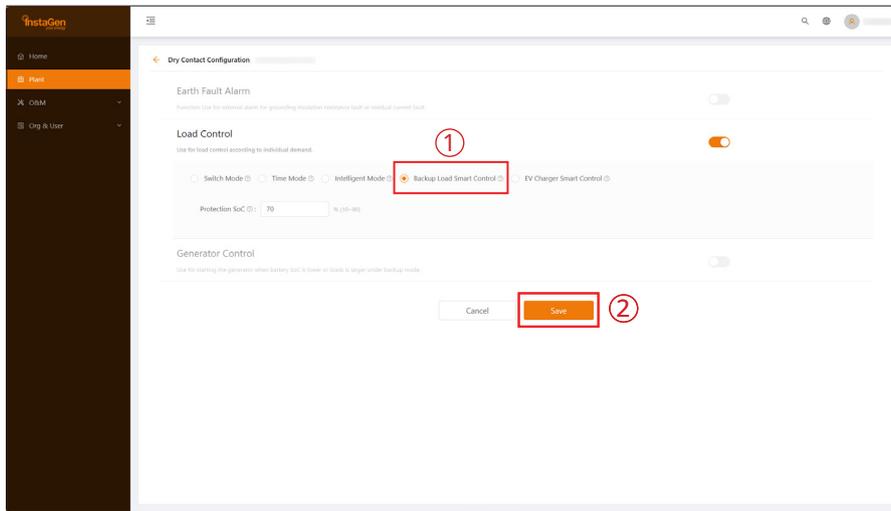
### 5.2.2 Set the Working Mode of Load

This setting is to control whether the load is working or not. There are five modes available as follows.

- (1) **Switch Mode:** Manually turn on or turn off the dry contact.
- (2) **Time Mode:** Set the time period for the dry contact to work. The dry contact is closed during this set time and disconnected at other times.
- (3) **Intelligent Mode:** Because the energy generated by PV fluctuates a lot, this mode is to make the dry contact avoid being turned on and off frequently. The dry contact will only be turned on when the residual energy generated by the PV exceeds the power set by the load within the set time period. You can set the minimum run time and the nominal power of the dry contact.
- (4) **Backup Load Smart Control:** The unnecessary dry contact will be turned off in the off-grid situation when the battery capacity is lower than the set SoC value. You can set the value of protection SoC if needed.

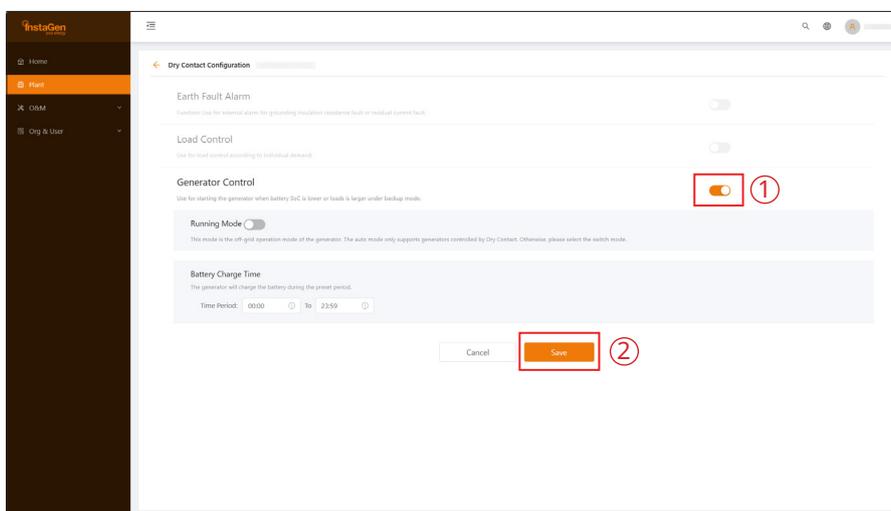
(5) EV Charger Smart Control: In this mode, whether to start the EV charger can be determined based on the total input current. When the input current is less than the value of the entrance breaker size minus the EV Charger size, the EV Charger is allowed to work; when the input current is larger than the entrance breaker size, shut down the EV Charger to protect the entrance breaker.





### 5.2.3 Generator Control

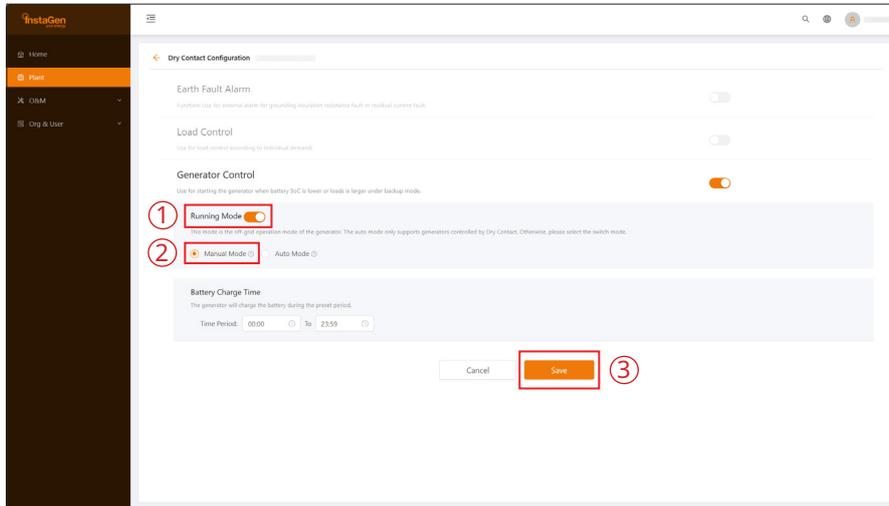
Generator control is used when there is higher power on the load side or lower battery capacity in off-grid mode. You can set the running mode and battery charge time according to your demand. When the battery capacity is below the set protection SOC, the generator will work.



### 5.2.3.1 Running Mode

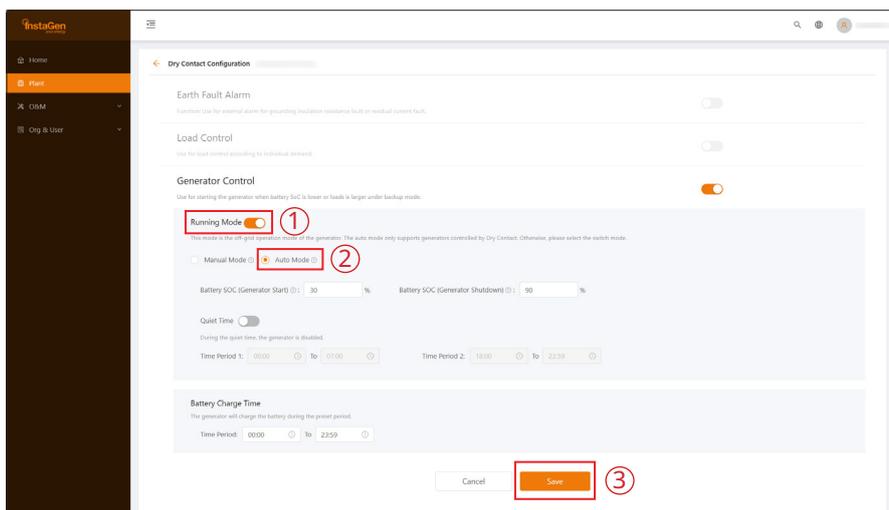
This mode is the off-grid operation mode of the generator, including manual mode and auto mode. The manual mode is used to start or shut down the generator manually; the auto mode is used to start or shut down the generator according to the preset conditions. The auto mode only supports generators controlled by Dry Contact. Otherwise, please select the manual mode.

#### a. Manual Mode



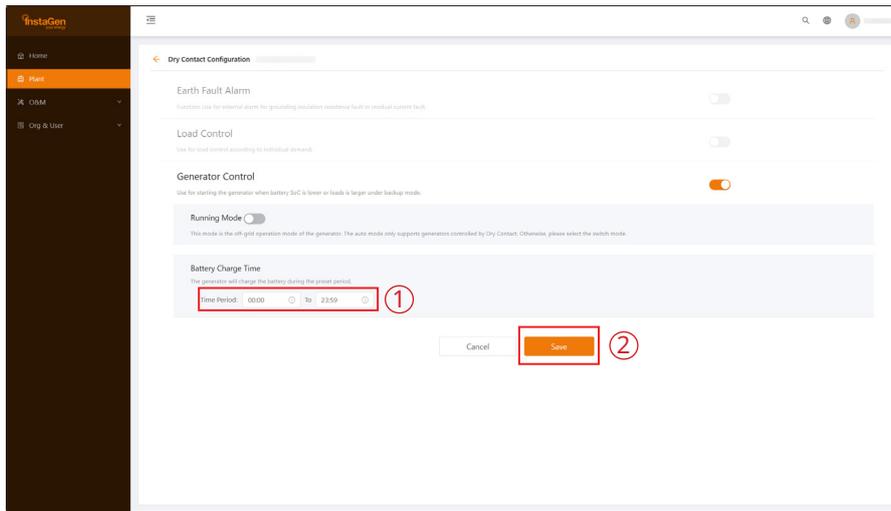
#### b. Auto Mode

Mode Parameter	Auto Mode
Battery SOC (Generator Start)	In off-grid mode, start the generator when the battery capacity is lower than the safety SOC.
Battery SOC (Generator Shutdown)	In generator mode, shut down the generator when the battery capacity is higher than the safety SOC.
Quiet Time	During the quiet time, the generator is disabled.



### 5.2.3.2 Battery Charge Time

Enable the Generator Control, set the battery charge time, and click "Save". After this operation, the generator will charge the battery during the preset period.





Instagen Installer



Instagen End-user

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