SIEMENS

Insights Hub

Upgrade

System Manual

03/2024

Introduction 1

User rights 2

User Interfaces 3

Upgrade offerings 4

Activating a package 5

Legal information

Warning notice system

This manual contains notices you have to observe in order to ensure your personal safety, as well as to prevent damage to property. The notices referring to your personal safety are highlighted in the manual by a safety alert symbol, notices referring only to property damage have no safety alert symbol. These notices shown below are graded according to the degree of danger.

⚠ DANGER

indicates that death or severe personal injury **will** result if proper precautions are not taken.

⚠ WARNING

indicates that death or severe personal injury **may** result if proper precautions are not taken.

⚠ CAUTION

indicates that minor personal injury can result if proper precautions are not taken.

NOTICE

indicates that property damage can result if proper precautions are not taken.

If more than one degree of danger is present, the warning notice representing the highest degree of danger will be used. A notice warning of injury to persons with a safety alert symbol may also include a warning relating to property damage.

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Table of contents

1. Introduction 4

1.1. Introduction 4

2. User rights 5

2.1. User rights 5

3. User Interfaces 7

3.1. User Interface 7

3.2. "Upgrades" user interface 8

3.3. "Execute your upgrade" user interface 10

3.4. "My Upgrades" user interface 11

4. Upgrade offerings 13

4.1. Overview 13

4.2. Upgrade offerings for "Buyer" 16

4.3. Upgrade offerings for "Requester" 17

4.4. Approve or decline an upgrade request 19

5. Activating a package 21

5.1. Activating a package 21

1 Introduction

1.1 Introduction

The "Upgrade" tool on the Launchpad is used to upgrade your tenant with additional offerings. The users can buy selected offerings and use them instantly in their environment.

- It is only possible to access the Upgrade tool if a valid Sold-To-ID is assigned. This Sold-To-ID is obtained after subscribing to a Service via Industrial IoT Store.
- The availability of the upgrades depends on the platform (Europe1) in use. For more information about each upgrade, access the "Upgrade" application.

For additional information, refer Usage Transparency

User rights

2

2.1 User rights

The "Upgrade" tool adopts the user rights and roles from "Settings". The user rights depend on the following general user roles:

General role	Rights
SubtenantUser	SubtenantUser can neither view the "Upgrade" app nor carry out chargeable transactions.
StandardUser	This is the default role of a tenant's user which contains permissions to get access to general tenant functionality, including "Requester" role for "Upgrade" tool.
TenantAdmin	This role grants full administrative access to the respective tenant, including "Requester" for "Upgrade" tool.

The user rights depend on the following "Upgrade" specific user roles:

Upgrade specific Role	Rights
Requester *platformpurchaseapp.requester*	The "Requester" can submit an upgrade request to the "Buyer" to purchase the upgrade (request for approval). By default, the "StandardUser" and "TenantAdmin" will have the "Requester" role. For more information about purchasing upgrades for a "Requester", refer "Upgrade offerings for "Requester".
Buyer *platformpurchaseapp.buyer*	- The "Buyer" can purchase the upgrades without restrictions. The "Buyer" can perform a direct purchase through "Upgrade". - The "Buyer" approves or declines subscription requests by the "Requester" using the "Upgrade" app or by accessing the upgrade request link received via email. The "Buyer" receives an e-mail with the confirmation of the purchase. - The "Buyer" can activate the package by entering the activation code, received from the Operator. For more information, refer "Activating a package". The "Buyer" role can be provided to a user by using "Settings". For more information about purchasing upgrades for a "Buyer", refer "Upgrade offerings for "Buyer".

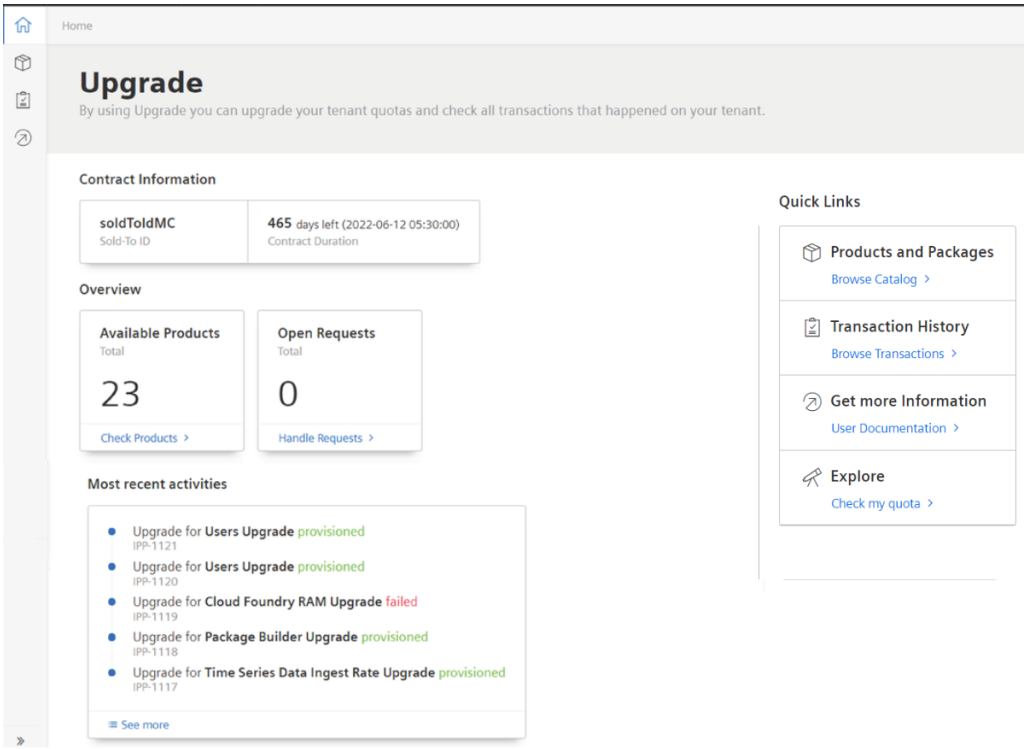
If the "Buyer" role is not visible in "Settings" application for assignment, you need to add it to your tenant using "Settings" app by clicking "Roles" and "Edit Roles".

User Interfaces 3

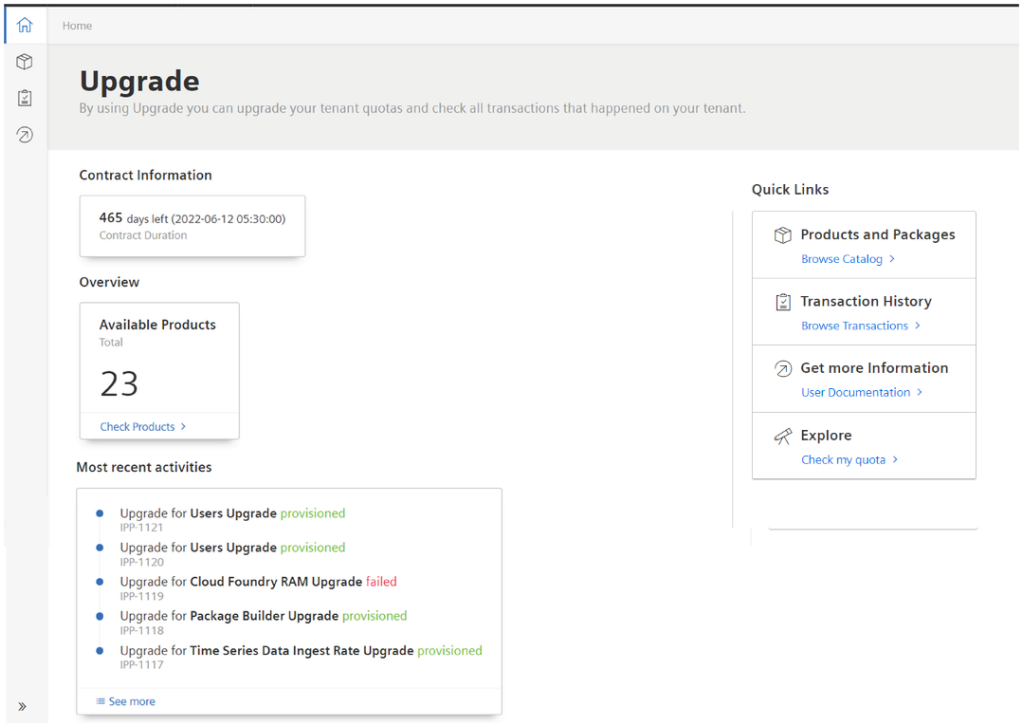
3.1 User Interface

"Home" user interface

The "Home" screen of the "Upgrade" application provides information about the Sold-To-ID and the Contract Duration. In addition, the overview of the available products and the open requests information (for Buyer) is also displayed.
The "Quick Links" section of the screen helps you to navigate through various tabs within the "Upgrade" application, along with the links to specific applications and products on the Industrial IoT Store.
The following graphic shows the "Home" screen for a user with "Buyer" role:



The "Sold-To-ID" and "Open Requests" information is not displayed for a user with "Requester" role. The following graphic shows the "Home" screen for a user with "Requester" role:



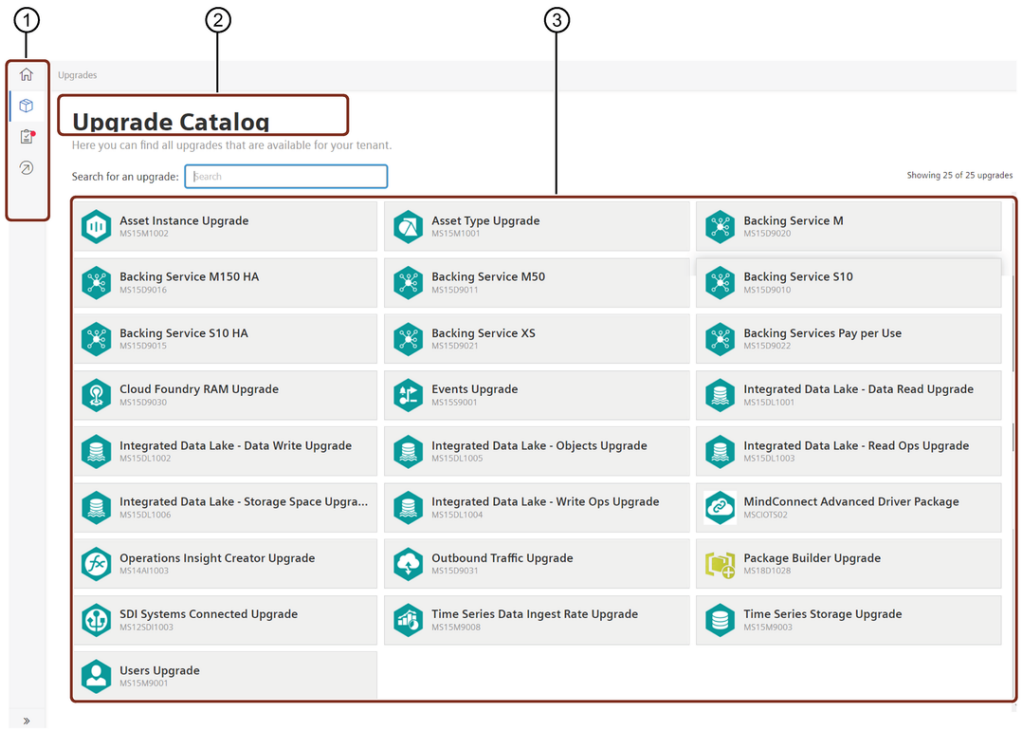
The following quick links are available for the user to easily navigate between different tabs within the "Upgrade" application, "Usage Transparency" and the Industrial IoT Store.

Quick links	Description	Available for
Browse Catalog	Re-directs to "Upgrades" screen within the "Upgrade" application.	TenantAdmin or StandardUser with "Buyer" or "Requester" roles
Browse Transactions	Re-directs to "Completed Upgrades" tab in the "My Upgrades" screen	TenantAdmin or StandardUser with "Buyer" or "Requester" roles
User documentation	Re-directs to the Upgrade system manual page	TenantAdmin or StandardUser with "Buyer" or "Requester" roles
Check my quota	Re-directs to "Usage Transparency" application	TenantAdmin with "Buyer" or "Requester" roles

3.2 "Upgrades" user interface

The "Upgrade Catalog" and "Upgrade details" screens are similar for "Buyer" and "Requester", except that the "Activation Code" tab will not be available in the main navigation for a user with "Requester" role. In addition, the "Check my quota" tab will not be available in the main navigation for a user if the "TenantAdmin" role is not assigned.

For a user with "Buyer" role, along with the "TenantAdmin" role, the "Upgrade" screen is as below:



① Main navigation with five tab-categories:

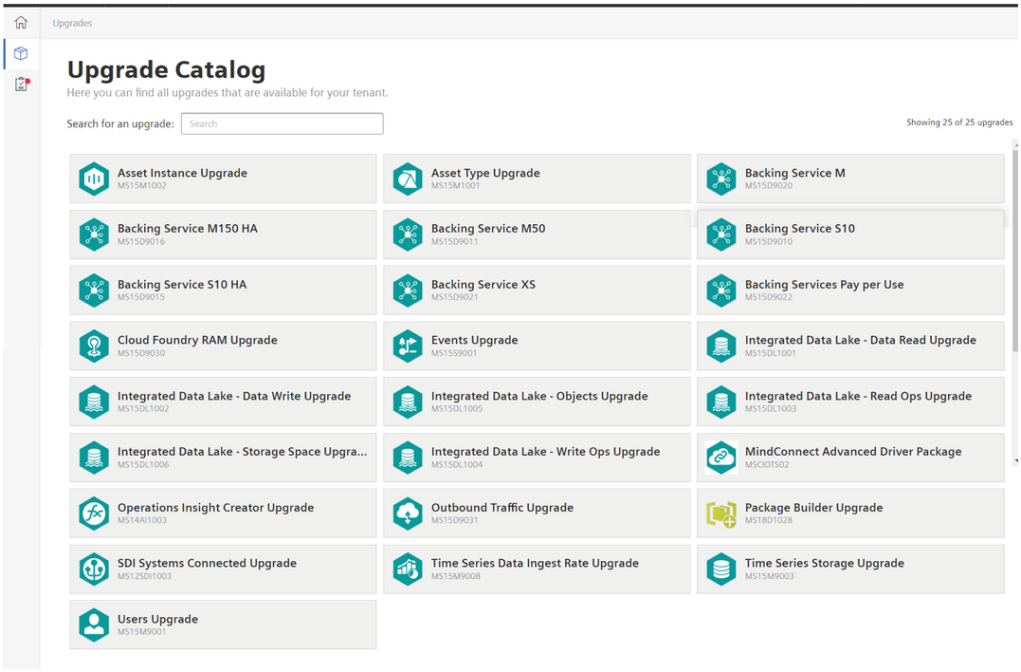
- Upgrades: Shows all the available upgrades for your tenant
- My Upgrades: Shows a list of all the requested and completed upgrades
- Activation Code: Starts Activation of the package after you enter the activation code
- Go to Store: Re-directs to Industrial IoT Store and opens in a new browser tab
- Check my quota: Re-directs to Usage Transparency and opens in a new browser tab

② Search tab to search for the required upgrade

③ Displays all the available upgrades for your tenant

If a user has a "Buyer" role assigned, but not the "TenantAdmin" role, then "Check my quota" tab will not be visible in the main navigation.

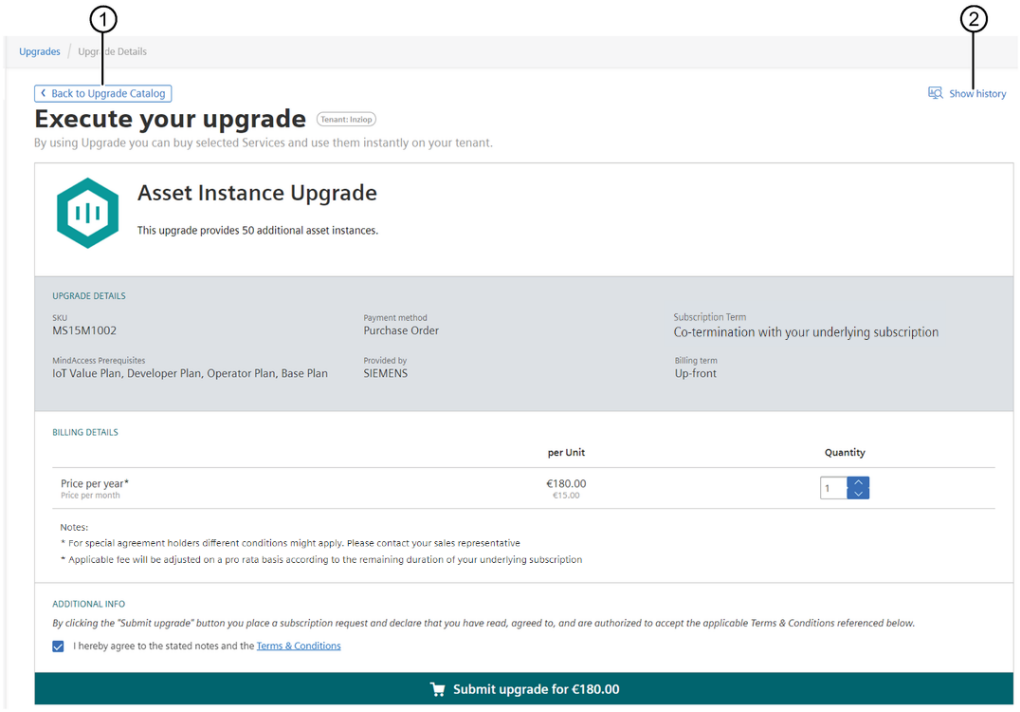
For a user with "Requester" role along with the "TenantAdmin" role, the "Upgrade" screen is as below:



If a user has a "Requester" role assigned, but not the "TenantAdmin" role, then "Check my quota" tab will not be visible in the main navigation.

3.3 "Execute your upgrade" user interface

The following diagram shows the "Execute your upgrade" screen for a user with "Buyer" role:

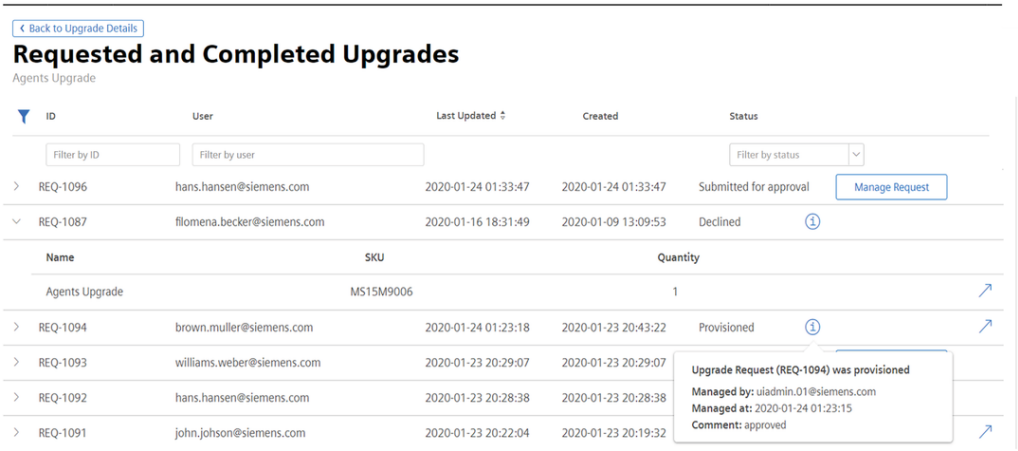


① Re-directs back to "Upgrade Catalog" page

② Opens the "Requested and Completed Upgrades" page to view the status of the previous purchases

"Requested and Completed Upgrades" user interface

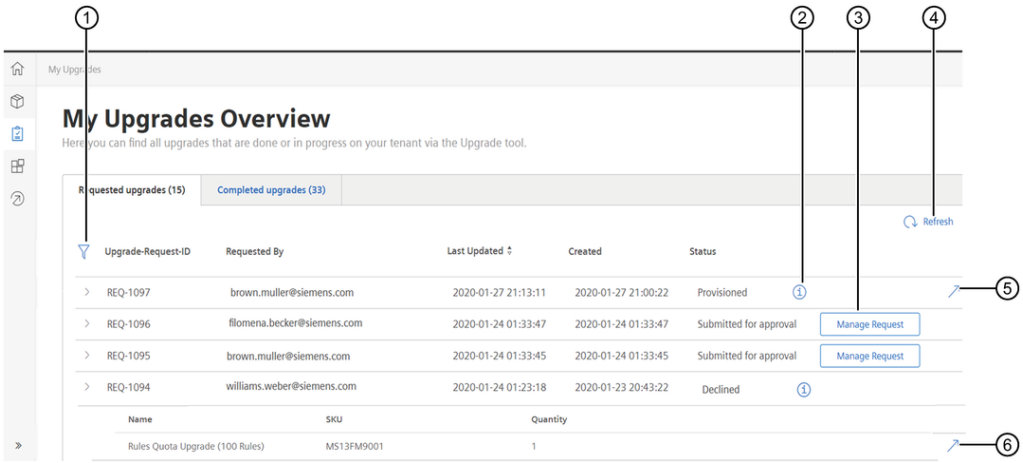
The following diagram shows the "Requested and Completed Upgrades" screen for a user with "Buyer" role. This screen displays all the details of the respective upgrade.



3.4 "My Upgrades" user interface

The "My Upgrades" screens are similar for "Buyer" and "Requester", except that the "Buyer" can additionally manage the upgrade requests by clicking "Manage Request".

For a user with "Buyer" role, the "My Upgrades" screen is as below:



① Filter the request results based on any of the following options:

- Filter by ID
- Filter by requester
- Filter by status
    - Submitted for approval
    - In progress
    - Approved
    - Declined

- Provisioned
- Failed

② Displays the details of each request

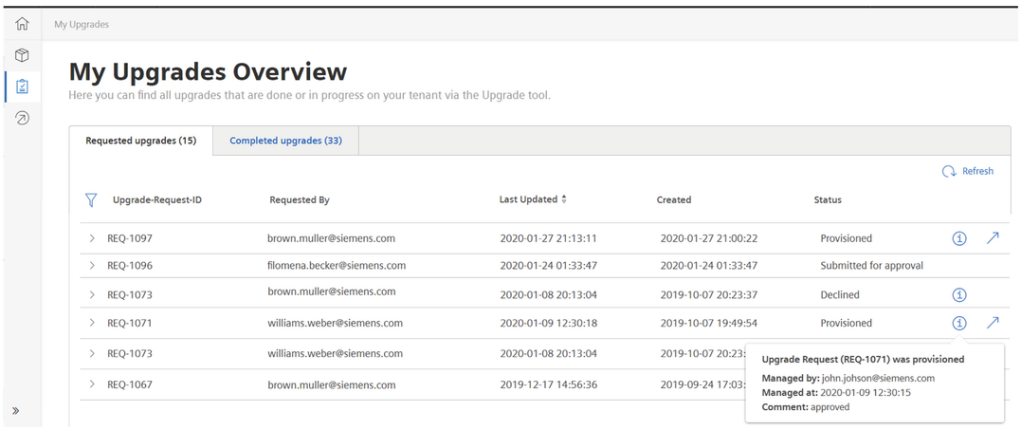
③ Navigates to "Manage upgrade request" screen wherein the request can be approved or declined

④ Refreshes the status of the request

⑤ Navigates to "Completed Upgrades" screen

⑥ Navigates to the "Upgrade" screen

For a user with "Requester" role, the "My Upgrades" screen is as below:



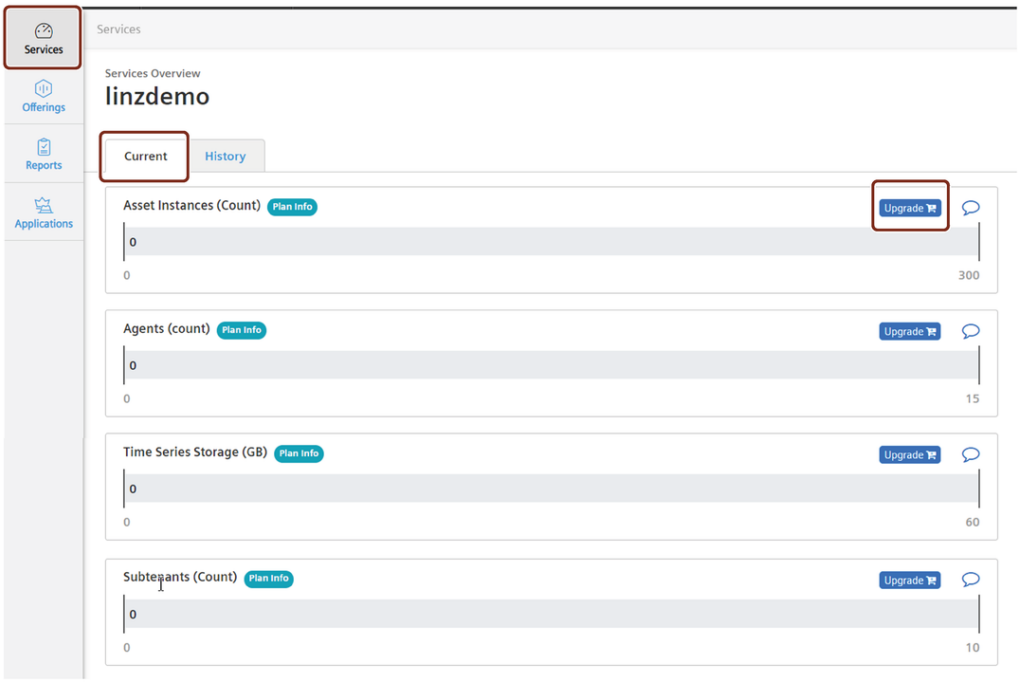
Upgrade offerings 4

4.1 Overview

Access "Upgrade"

To access this tool from Launchpad, click "Upgrade" icon.

It is also possible to access the "Upgrade" tool from **Usage Transparency**. Click "Limits" and then click "Upgrade" that is available next to the metrics to purchase the upgrade.



Maximum upgrade metrics

There is a maximum limit (quantity) of a product that can be purchased at a time. The maximum limit is set to avoid errors or prevent the purchase of a very high quantity which could have an impact on customer costs and could impact platform stability. This limit is dependent on the product selected and might change over time. As an example you can find some limits related to products in the table below.

Upgrade	Maximum quantity that can be purchased at a time
Agents Upgrade	10
Asset Instances Upgrade	100
Asset Type Upgrade	100
Backing Services M	5
Backing Services XS	5
Backing Service S10	5
Backing Service M50	5
Backing Services Pay per Use	5
Backing Service S10 HA	5
Backing Service M150 HA	5
Cloud Foundry RAM Upgrade	5

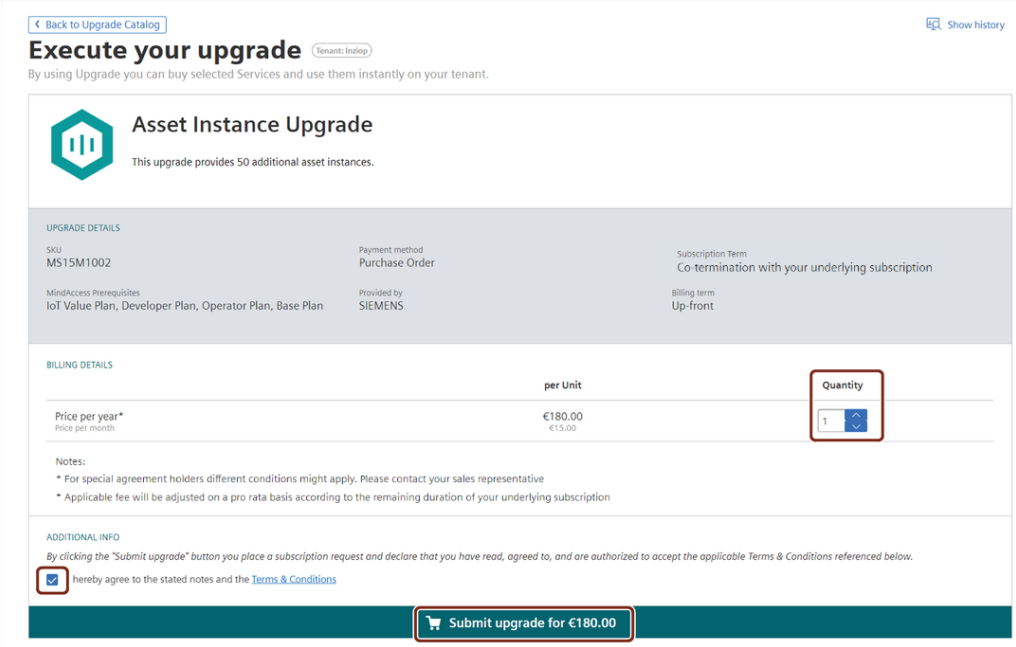
Upgrade	Maximum quantity that can be purchased at a time
Outbound Traffic Upgrade	5
Rules Quota upgrade (20 rules)	10
Rules Quota upgrade (100 rules)	5
Events Upgrade	2
Subtenants Upgrade	10
Users Upgrade	5
Visual Flow Creator Upgrade	20
Visual Explorer - Creator Upgrade	20
Visual Explorer - Viewer Upgrade	20
Time Series Data Ingest Rate Upgrade	90
Time Series Storage Upgrade	20
Package Builder Upgrade	2
Integrated Data Lake	1
Integrated Data Lake - Data Read Upgrade	100
Integrated Data Lake - Data Write Upgrade	100
Integrated Data Lake - Read Ops Upgrade	100
Integrated Data Lake - Write Ops Upgrade	100
Integrated Data Lake - Objects Upgrade	100
Integrated Data Lake - Storage Space Upgrade	100
SDI Systems Connected Upgrade	1
MindConnect IoT Extension Upgrade	24
Operations Insight Creator Upgrade	10
MindConnect advanced driver package	10

It is only possible to access the Upgrade tool if a valid Sold-To-ID is assigned. This Sold-To-ID is obtained after subscribing to a Industrial IoT Service via Industrial IoT Store.

4.2 Upgrade offerings for "Buyer"

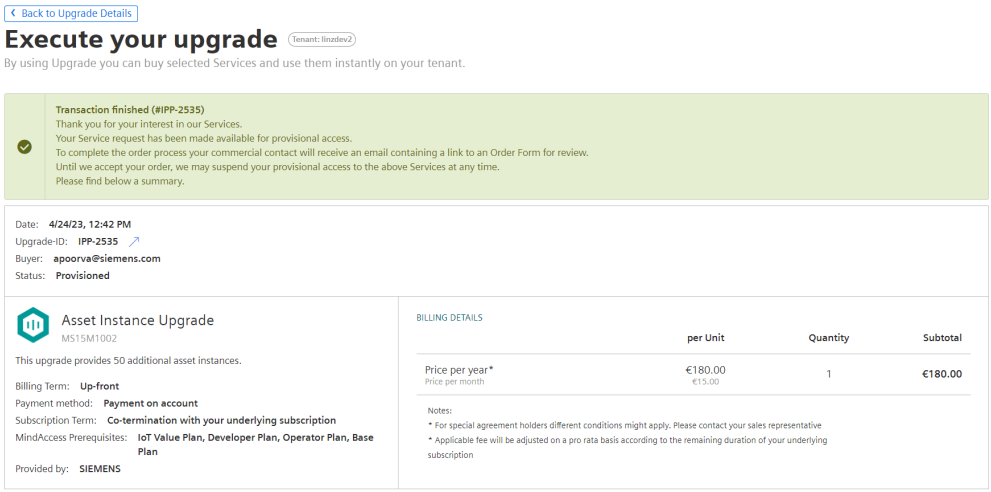
The following procedure describes the steps to purchase an upgrade for a user with "Buyer" role.

1. Log in to "Upgrade". Select the upgrade that you wish to purchase in "Upgrade Catalog".
2. Select the number of upgrades that ou wish to purchase in "Quantity".
3. Check the "Terms & Conditions" checkbox and click "Submit upgrade".



After you

click "Submit upgrade", the upgrade process begins and the status can be viewed on the screen.

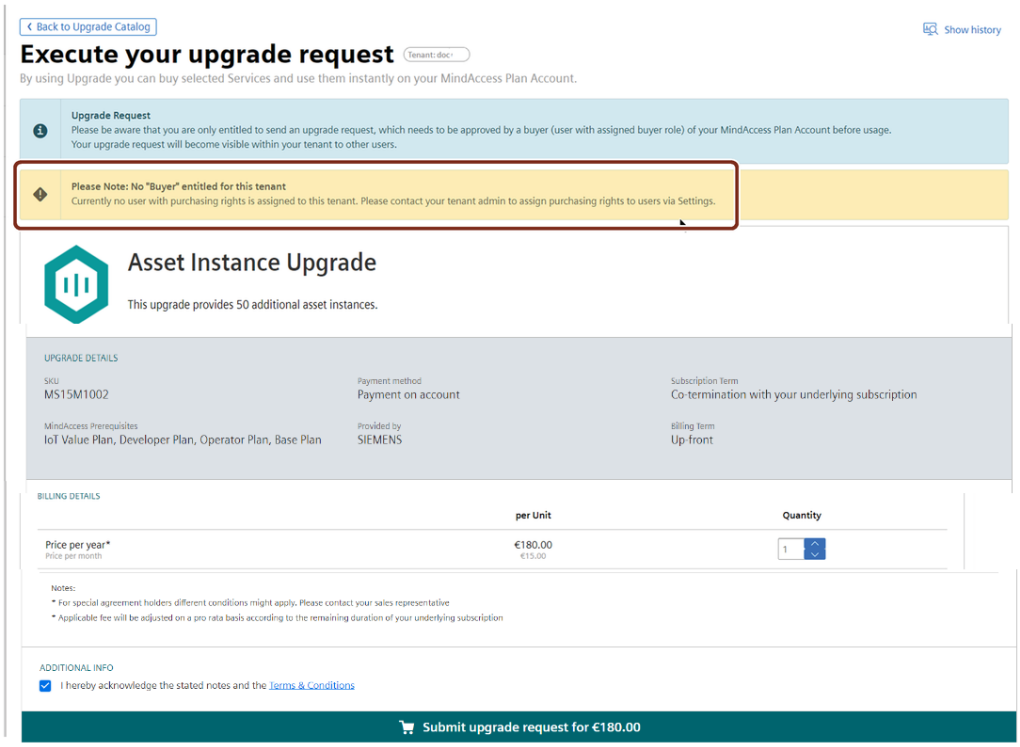


There exists a maximum quantity limit that you can purchase at a time. For more information, refer to the maximum upgrade metrics section in the "Overview" chapter.

4. Click "Back to upgrade details" to navigate to the previous page.

4.3 Upgrade offerings for "Requester"

If the "Buyer" role is not assigned to a user, then the user cannot purchase the upgrade. However, a user can submit an upgrade request. To do this, a user will have the "Requester" role, by default.
If the "Buyer" role is not assigned to a tenant, then your upgrade request will remain un-approved until the "Buyer" role is assigned to a user of the tenant. A message is displayed in the "Execute your upgrade request" screen as below:

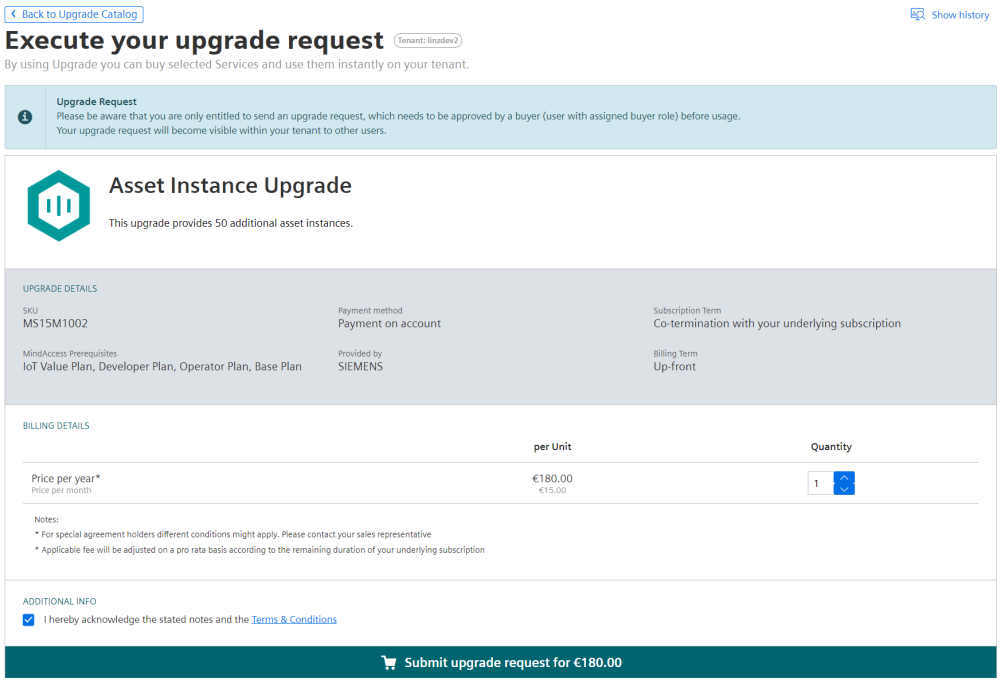


The following procedure describes the steps to purchase an upgrade for a user with "Requester" role.

1. Log in to "Upgrade". Select the upgrade that you wish to purchase in "Upgrade Catalog".

2. Select the number of upgrades that you wish to purchase in "Quantity".

3. Check the "Terms & Conditions" checkbox and click "Submit upgrade request".



The upgrade request will be submitted for approval. The "Buyer" receives an email with the corresponding link for approving or declining the corresponding upgrade request. Alternatively, the corresponding request can also be accessed in "Upgrade" in the "My Upgrades" screen.

4. You can view the current status of your requests in "My Upgrades Overview" page.

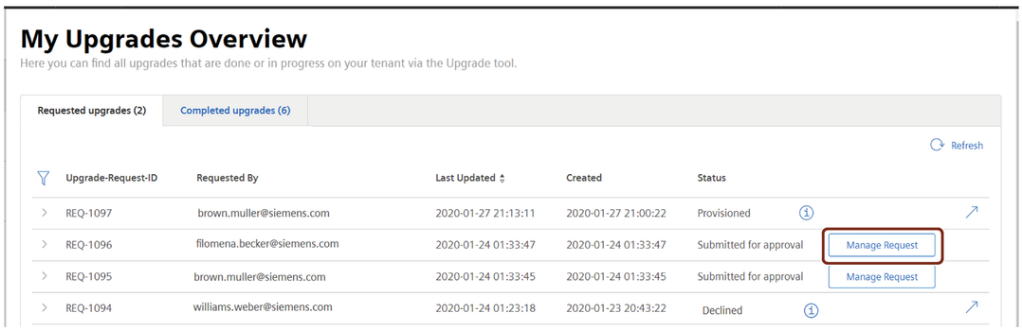
4.4 Approve or decline an upgrade request

The "Buyer" can either approve or decline the request. After the "Requester" submits an upgrade request, the "Buyer" receives an email with the corresponding link to that upgrade request. The upgrade request can be approved or declined in one of the following ways:

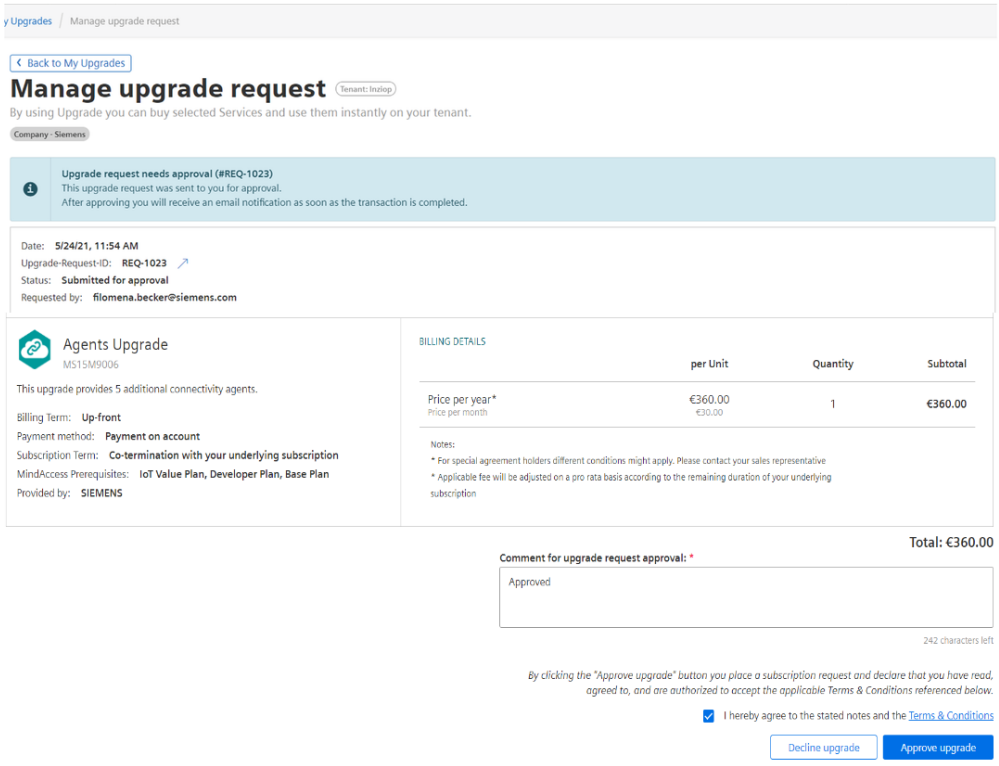
- Access the link in the email received, which opens "Upgrade" application
- Access "Upgrade" from Launchpad, click "My Upgrades" and then click "Requested upgrades"

The following procedure describes the steps for a "Buyer" to approve an upgrade request using "Upgrade".

1. After the "Requester" requests for upgrade, the request will be sent to the "Buyer". Click "My Upgrades" and you will be able to view all the requested upgrades. For the request that you wish to approve, click "Manage Request".



2. Enter the comment for approval and select the check box next to "Terms & Conditions". Click "Approve upgrade".



A maximum of 250 characters are allowed to be added in the comments textbox. Once the upgrade request

is approved, the Buyer can view the "Upgrade-Request-ID" and "Upgrade-ID" using which the latest status of the respective request or subscription can be viewed. The "Requester" will also receive an email with links to "Upgrade" and "Upgrade request" which can be used to view the latest status.

3. To decline an upgrade request, enter the comment for declining the request and click "Decline upgrade".

Activating a package

5

5.1 Activating a package

The "Activation Code" screen enables you to use the package by activating the code received from the Operator. In order to activate the package, ensure that the following requirements are satisfied:

- a package is already created by using the Package Builder app
- the package is activated
- the activation code is generated

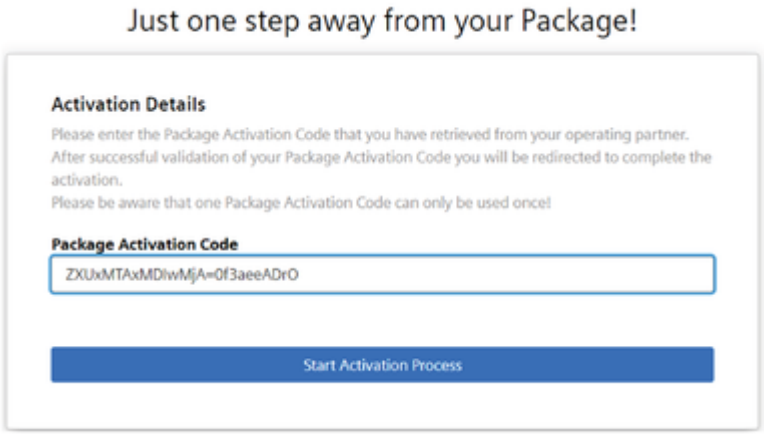
The "Activation Code" tab can be accessed only if:

- a user is assigned a "Buyer" role
- MindAccess IoT Value Plan is purchased

To activate the code received from the Operator, proceed with the following steps:

1. In the "Upgrade" app, click "Activation Code" from the left navigation.

2. Enter the package activation code that you have received from the Operator and click "Start Activation Process". The package details and the package provider information is displayed.



The code can be used only once. If you enter a previously used code, then a message appears informing you to enter another code for activation.

3.Click "Activate this package". <b/r> 4.Enter the required details. Access, verify and accept the terms and conditions. Click "Submit activation request".

The request is sent to the operator for approval. After the operator approves this request via Package Builder app, the approval status email is sent. The package is successfully activated.