FeneTech, Inc.

FeneVision® Web Admin User Manual

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Overview

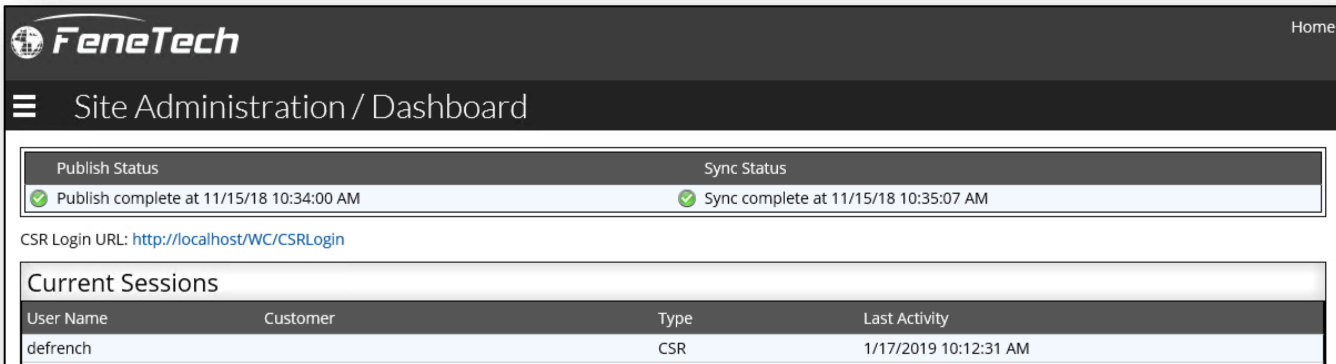
The FeneVision Web Admin site is the administrative setup application used for FeneVision Web configuration.

Note: The user must sign in with a Windows domain or local account that has administrative privileges to open FeneVision Web Admin site.

Using Web Admin

Dashboard

The dashboard screen is the landing page for FeneVision Web Admin. This list displays all users that currently have an active session of FeneVision Web.



The 'Publish Status' section indicates the current status of the data publish. A successful publish will display the time completed. An unsuccessful publish will be reflected in a message describing the issue.

The 'Sync Status' section indicates the current status of the Web sync. A successful sync will display the time completed. Any issues will indicate what was being synced and caused the issue.

The 'CSR Login URL' indicates the link an employee will use to log into CSR mode. This link will show as http://<servername>/WC/CSRLogin.

The 'Current Sessions' section of the dashboard displays the following information:

- **User Name –** User's login name that is currently signed in to Web.
- **Customer –** Customer name and site from Core customer setup (also referred to as a Dealer in Web manuals).
- **Type –** Displays whether the user is Company (Dealer), a Contractor (Dealers customer), or CSR (internal employee).
- **Last Activity –** Date and time the user last performed an action in Web.

All columns are can be sorted by selecting the column header.

Reports

This is the location where Web admins can view any custom Web reports that have been added to the page. Reports can be added to this page by adding the necessary information to the 'SystemReports' table in the 'FVRemoteWC' database (Microsoft SQL experience required).

Adding Custom Web Reports

There exist three dialogs that support custom reports in Web. Once a custom report has been deployed the user must add the report to the 'SystemReports' table in SQL Management Studio. This table is the same as the 'System Reports' screen in Coe. Reference 'System Reports' in the FeneVision Core user manual for additional details.

	ReportID	ScreenName	MenuSequence	MenuCaption	ReportTitle	ReportPath	ReportParams	ShowParams	Flags
▶	1	WEB\Order Status	7	SampleReport1	SampleReport1	SampleReport1	oKey=<oKey>	True	3
	2	WEB\Quote Entry	7	SampleReport2	SampleReport2	SampleReport2	oKey=<oKey>	True	3
	3	WEBAdmin	1	SampleReport3	SampleReport3	SampleReport3	oKey=<oKey>	True	0
*	NULL	NULL	NULL	NULL	NULL	NULL	NULL	NULL	NULL

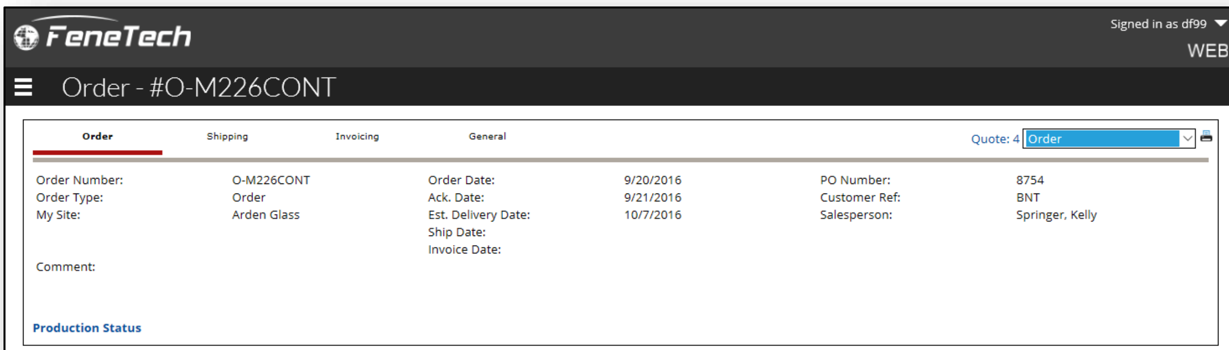
The following columns exist in this table.

- **ScreenName –** Used to indicate which Web screen the report will be displayed in.
  - **Web\Order Status –** Link a custom report in the drop down when an order is viewed in Web.
  - **Web\Quote Entry –** Link a custom report in the drop down when a quote is viewed in Web.
  - **WebAdmin –** Link a custom report in the Web Admin Reports page.

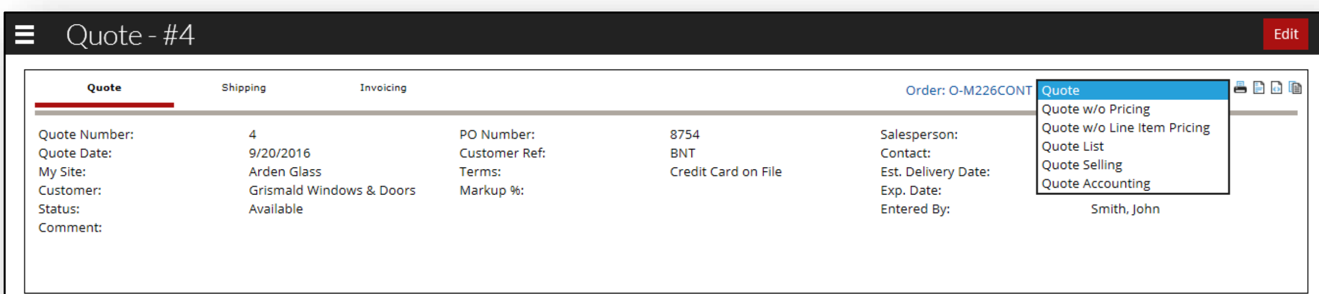
- **Flags**
  - **1 –** Show to Dealers
  - **2 –** Show to Contractors
  - **3 –** Show to Dealers and Contractors

Examples of Available Report Locations

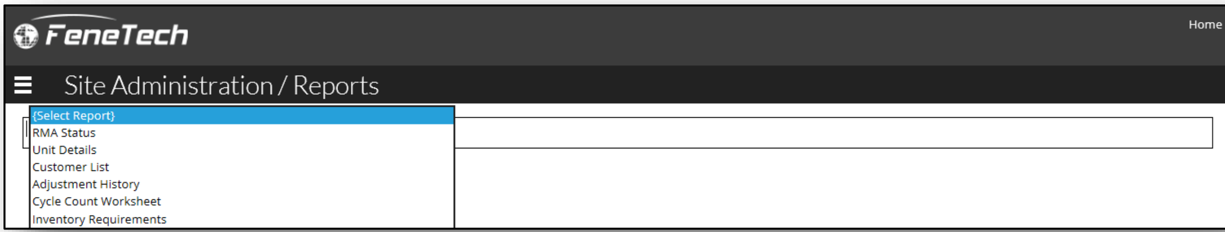
Order Status



Quote Entry



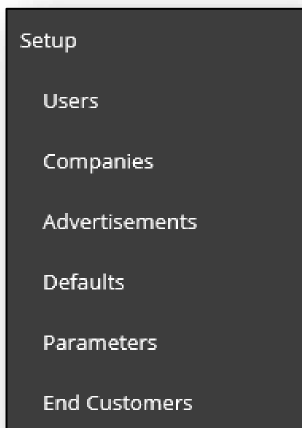
Web Admin Reports



Exiting
Exit the FeneVision Web Admin page by exiting the browser.

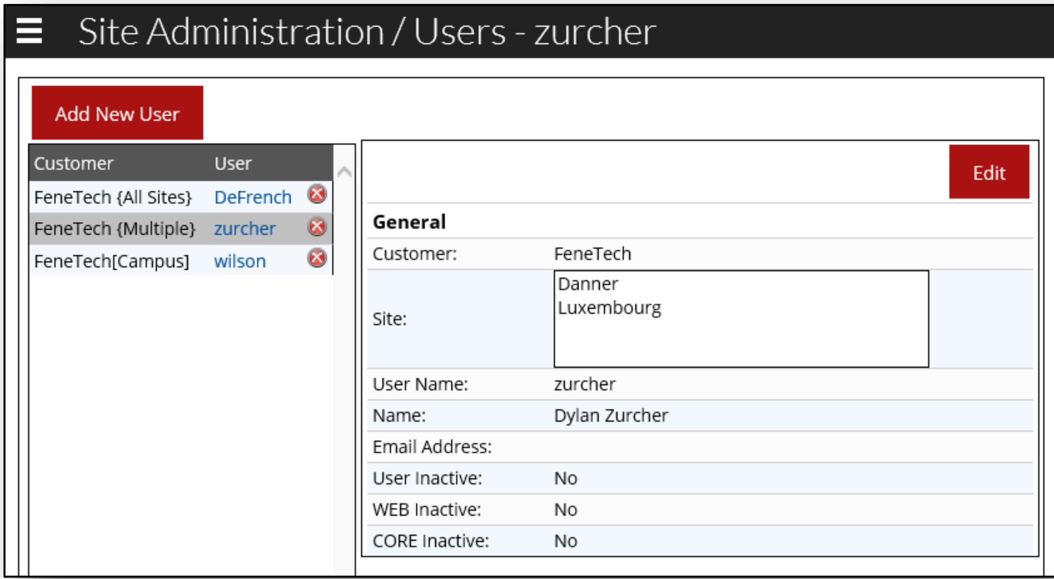
Setup
The 'Setup' menu includes screens allowing the configuration of the following:

- **Users –** The representative of the Manufacturer (you).
- **Companies –** The Dealers with whom the manufacturer works.
- **Advertisements –** Downloaded images / text for the Dealer's use.
- **Defaults –** User-defined defaults for FeneVision Web.
- **Parameters –** User-configured parameters for FeneVision Web.
- **End Customers –** User-configured Contractor information.



System Requirements
FeneVision Web has specific system requirements. Please reference the FeneVision Hardware and Software Requirements document for more information.

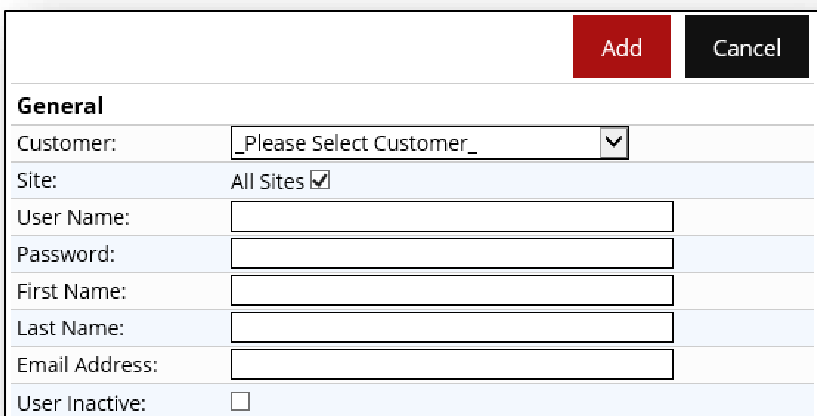
Users
FeneVision Web users are configured in the 'Users' menu.



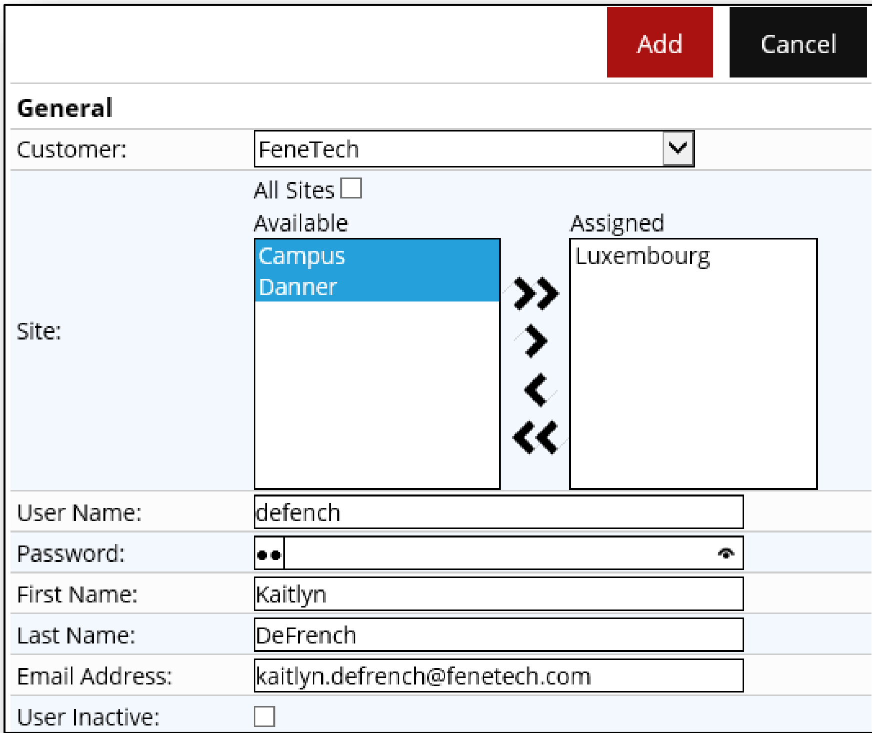
To set up FeneVision Web users, Select 'Setup' >> 'Users'. The left side of the screen displays a list of existing Web users.

To add a user, complete the following:

1. Select 'Add New User'. This will display a template for adding user details, as shown below.



2. Enter the customer information under the 'General' section.



The following fields exist in the 'General' section:

- **Customer –** Manufacturer's customer name, also referred to as a Dealer.
- **Site –** Manufacturer's customer's site. Use the left and right arrows to assign which site(s) for which the user will be able to create quotes. If the user will be granted a customer level login, the administrator should check the {All Sites} checkbox. Customer level logins will be allowed to create quotes for all sites.
- **User Name –** User name used to sign in to Web (required).
- **Password –** Password used to sign in to Web (required).
- **First Name –** User's first name.
- **Last Name –** User's last name.
- **Email Address –** User's email address.
- **Inactive –** Sets user as inactive. Inactive users are not able to sign in to Web.

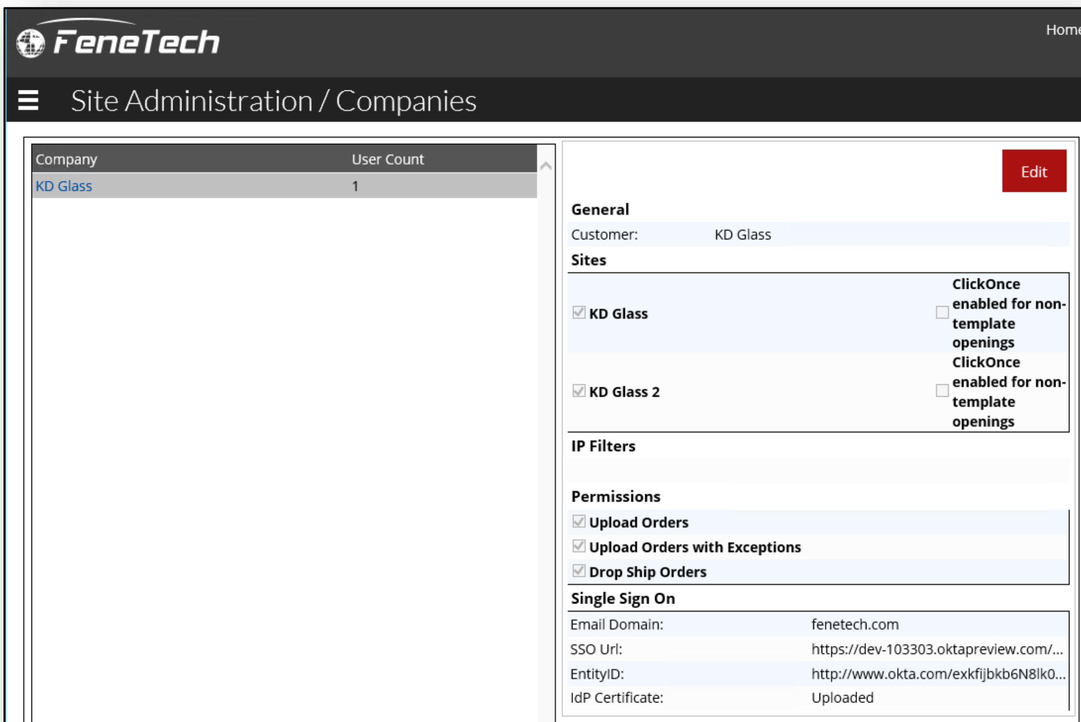
3. Select 'Add'. The user will be added to the list on the left side of the 'Users' setup screen. To cancel, select 'Cancel' button.
4. To edit existing users, select on the user name in the list on the left side of the screen, and then select 'Edit' on the right side of the screen.
5. To delete a user, select 'Delete' next to the user.

Companies

To view the list of dealers and their users' accounts, select 'Setup' >>'Companies'.

On the left side of the screen a list of dealers will be displayed with the number of users assigned to the dealer.

To view details about an account, select the dealer name on the left side of the screen. To edit these details, select 'Edit' on the right side of the screen.



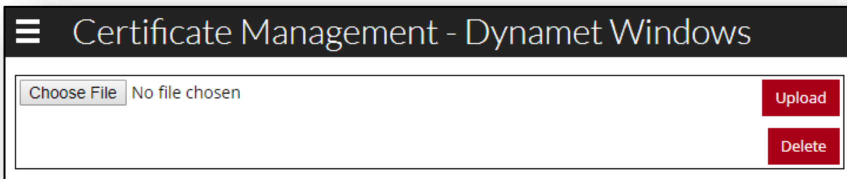
The information regarding the account on the right side of the screen shows the following:

- **Customer –** Dealer's name.
- **Sites –** List of Dealer's manufacturing sites.
- **ClickOnce enabled for non-template openings –** Enables the ability for companies to use the 'ClickOnce' application for 'Opening Designer' parts without templates configured. When not checked, 'Opening Designer' parts without templates will be entered directly in the browser.
- **IP Filter –** If an IP address is specified, all logins (for the account) that attempt to log in from a different IP address will be denied access. The number 0 is a wildcard. If left blank, all logins for the account will be able to log into Web regardless of their IP address.

For example, the Manufacturer specifies an IP filter of 172.25.0.0. This means that any users whose IP address begins with 172.25 will be permitted access and everyone else will be denied. The benefit of this feature is that FeneVision WEB will only be accessible from a limited number of IP addresses so that dealer's employees can only use FeneVision Web from the dealer's network.

- **Permissions –** When the permission checkbox is selected, all users for the Dealer will have the ability to perform the action (unless the permission is revoked for a user's individual login). The permissions that can be assigned are as follows:
  - **Upload Orders –** Ability to upload quotes from 'Quote Maintenance'.
  - **Upload Orders with Exceptions –** Ability to upload quotes from 'Quote Maintenance' that have at least one line item with an exception.
  - **Drop Ship Orders –** Ability to drop ship orders from the Manufacturer directly to the contractor.

- **Single Sign On –** Used to create corporate sign on accounts for user through a third-party single-sign-on provider.
  - **Email Domain –** Identify the corporate email domain associated the IdP.
  - **SSO URL –** URL to which Web will redirect on login.
  - **EntityID –** Unique name provided by the IdP.
  - **IdP Certificate –** Certificate being used for the connection to the IdP. To upload the certificate:
    i. Select Certificate Management (this will open a separate tab on the internet browser being used).



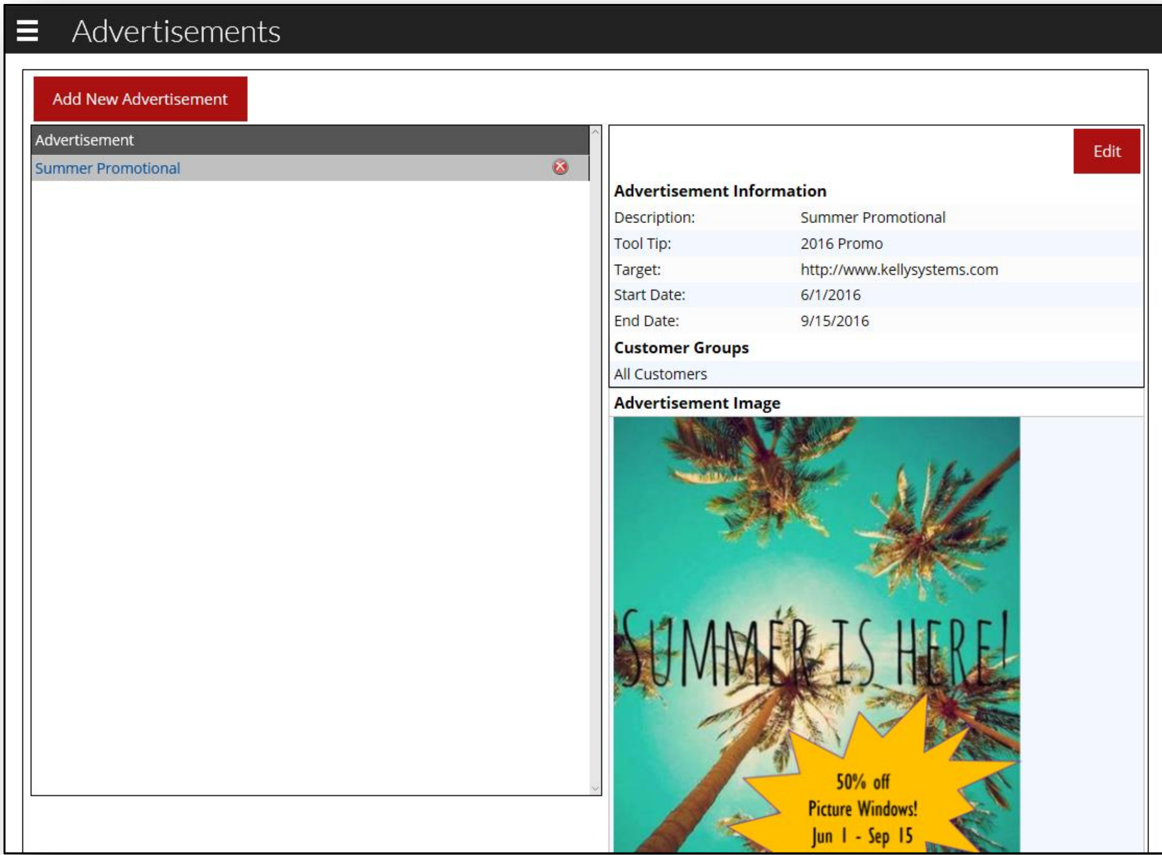
    ii. Select Choose File and find the certificate.
    iii. Select Upload.
    iv. Once uploaded, close the tab.

    Note: After uploading the certificate, the web application pools within IIS must be recycled for single-sign-on to appear properly in Web.

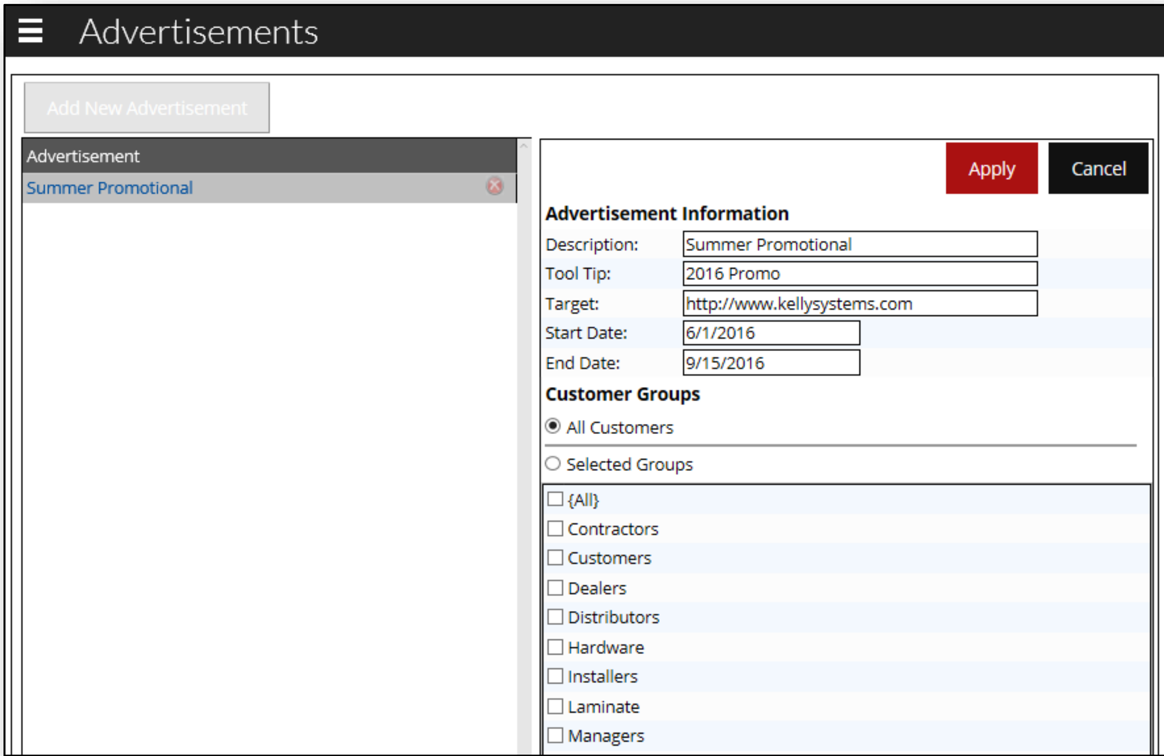
Once changes have been made, select 'Apply'.

Advertisements

The 'Advertisements' feature in Web allows users to upload graphics to screens in Web advertising their products.



To access the 'Advertisements' screen, go to 'Setup' >> 'Advertisements'. To view existing advertisements, select the existing advertisement's title. The screen that appears will show the advertisement. Select 'Edit' to modify the current advertisement.



To add a new advertisement, select 'Add New Advertisement'. Enter information in the following fields:

- **Description –** Tagline for the advertisement.
- **Tool Tip –** When hovering over the actual advertisement, displays what the tool tip will state.
- **Target –** Sets URL where the user will be taken once the user has clicked on the 'Advertisement' image.
- **Start and End Date –** The date range in which the advertisement will appear.
- **Customer Groups**
  - **All Customers –** Advertisement is available for all Dealers.
  - **Selected Groups –** Advertisement is available to only some of the selected Dealer groups set up in 'Customer Groups' in FeneVision Core.

- **Advertisement Image –** Select Browse to find an image to upload. Select 'Upload Image' to upload that image as an advertisement.

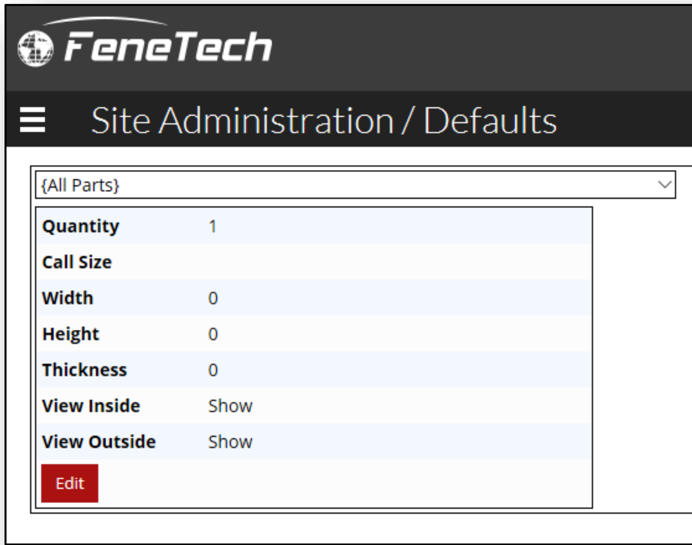
Defaults

'Defaults' setup allows the Manufacturer to specify quantity and dimension defaults for new line items in 'Quote Entry', in addition to the ability to hide fields for all parts or specific parts.

For example, the thickness field is often hidden for all window products, and the call size field is often hidden for all glass products. All fields may be hidden for miscellaneous items that do not require size input.

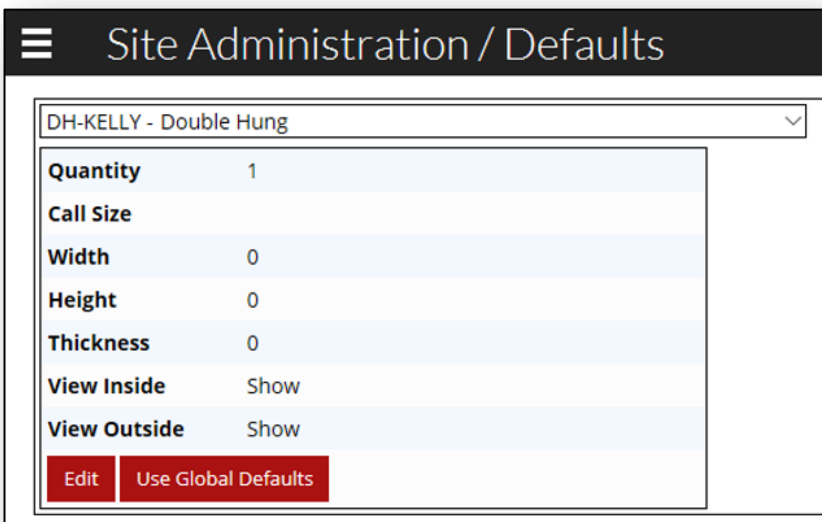
To set up defaults, complete the following:

1. Select 'Setup' >> 'Defaults'.

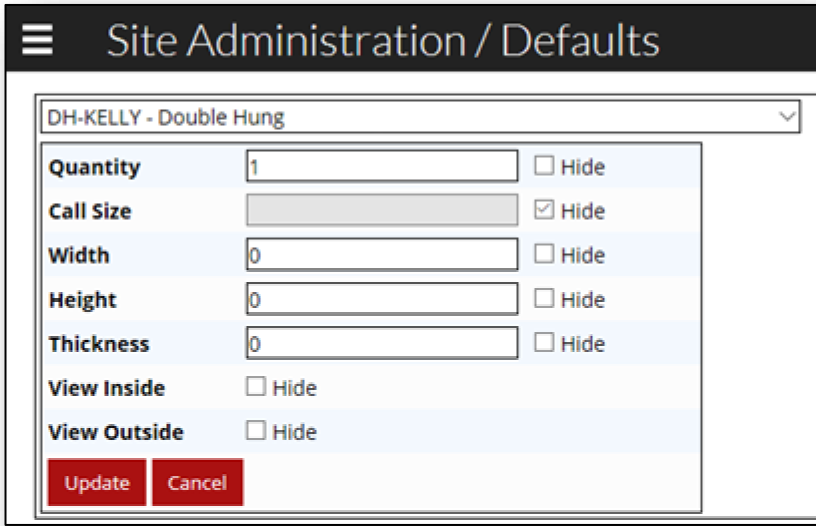


2. Select a part in the drop-down list. The part defaults will be displayed (as shown below).

   Note: The global default is the {All Parts} default setting.



3. Select 'Edit' to access the individual defaults for the selected part. Choosing 'Use Global Defaults' will set this part to use the defaults from the {All Parts} selection.

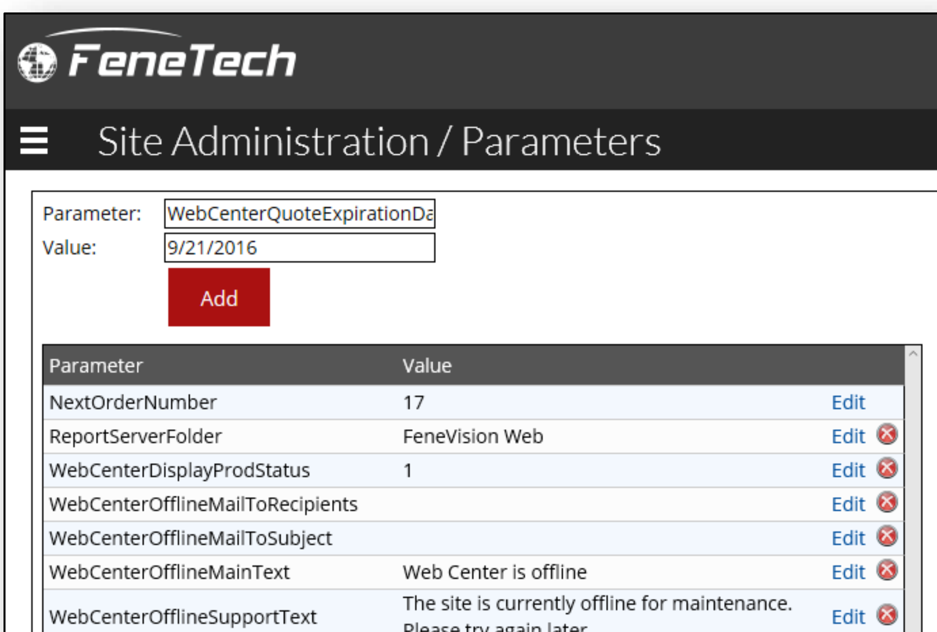


4. Update the default quantity, call size, width, height, and thickness fields as needed.
5. Select 'Hide' for any fields that should be hidden from the Dealer in 'Quote Entry'.
6. Select 'Hide' next to 'View Inside' or 'View Outside' to disable the ability to select those views in the quote entry screen in Web. If both are hidden, the system default view will display.
7. Select 'Update' to save or 'Cancel' to cancel changes.

Parameters

The 'Parameters' screen allows manufacturers to set parameters that affect FeneVision Web's behavior.

For example, the 'WebCenterQuoteExpirationDate' parameter allows the Dealer to set a date where all quotes that have not yet been uploaded will expire. This is beneficial when a pricing change is set to take place.



The chart below lists the possible parameters and their values.

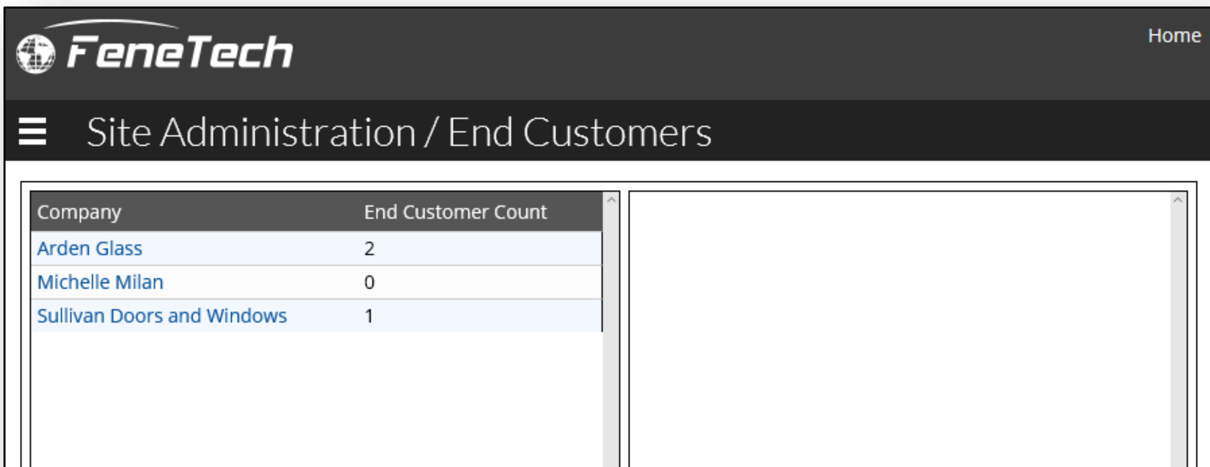
NAME	DESCRIPTION	REQUIRED?
NextOrderNumber	The quote number assigned to each quote. Each time a quote is added, NextOrderNumber is incremented by 1.	Yes
ReportServerFolder	The SSRS folder Web will use to print reports.	Yes, if using SSRS. No if using ActiveReports.
WebCenterApprovalEmailTo	Defines the email address of the recipient(s). Multiple email addresses can be used by separating each address with a semicolon.	No (if not defined Web approval email notification will not be sent to the manufacturer)
WebCenterApprovalEmailToSubject	Defines the subject of the email.	No (if not defined WEebapproval email will not have a subject)
WebCenterDisableConfirmation FaxesAndEmails	If value is 1, order upload will not send out conf. faxes & emails.	No (If not defined or value is 0, conf. faxes & emails will be sent out via eServer, depending on the default ack type setting in FVMaster's Customer Setup)
WebCenterDashBoardQuotesFirst	If the value is 1, quotes will be displayed before orders	No (if not defined, orders will show before quotes)
WebCenterDashboardShowEstDeliveryDateColumn	If the value is 1, the Est Delivery Date Column will appear for quotes in Web.	No (if not defined the column will be hidden)
WebCenterShowSquareFeet	If the value is 1, square feet will be displayed	No (If not defined, square feet will not be displayed)
WebCenterDisplayProdStatus	If 1, the production status link will be displayed for orders that have been released to production (on the Order Status screen)	No (if not defined, the production status link will never be displayed)
WebCenterQuoteExpirationDate	Enabled when the user wants all quotes to expire on a certain day because price increases or other accounting practices are occurring that affect pricing.	No
WebCenterDisplayProdStatusRejectLink	If 1, the reject link will be displayed on the production status page. When the user selects this link it gives the reject reasons for the unit.	No (if not defined, the user will see that the unit has been rejected, but won't be able to see the reason)

WebCenterSupportFilesPath	The path to the directory that contains support files for Web users. Can be a UNC path, or the local path (such as C:\Temp) if the directory is on the web server.	No (if not defined, the Support Files link in the Web menu will not be displayed)
WebCenterDefaultParentPONumber	The default PO number that is uploaded to the manufacturer during quote uploads. Can be overridden by customer admins or any user prior to upload. Possible Values: Order, PO	No (if not defined, the default PO number is Override (Blank))
WebCenterDefaultParentCustomerRef	The default Customer Ref. that is uploaded to the manufacturer during quote uploads. Can be overridden by customer admins or any user prior to upload. Possible Values: Customer, Order-Customer, Customer Ref. (including the period)	No (if not defined, the default Customer Ref. is Override (Blank))
WebCenterHideRememberMeCheckbox	Integer Values that determines if the ‘Remember Me’ checkbox is displayed on the login page.	No (If not displayed, the user will be required to specify their login information every time they access Web)
WebCenterQuickQuoteCustomerDefaultPricingMethod	String value indicating the pricing method of quick customer quotes. Valid values are: DiscountFromList, MarkupFromCost, or GrossMargin.	No (defaults to DiscountFromList if parameter does not exist)
WebCenterQuoteMaintenancePageSize	Integer value that determines the number of rows shown in ‘Quote Maintenance’ before paging occurs.	No (defaults to 25 if parameter does not exist)
WebCenterRDMaxLookAheadDays	Integer value to determine how many days in the future a requested delivery date can be selected.	No (if omitted, value is 180)
WebCenterShowRequestedDeliveryDate	Boolean value to show ‘Requested Delivery Date’ column in Quote Maintenance.	No
WebCenterSSRSUser	A user on the SSRS machine that has permissions to access the SSRS ‘Browser’	No
WebCenterSSRSPassword	The password for the user on the SSRS machine that has permissions to access the SSRS ‘Browser’	No

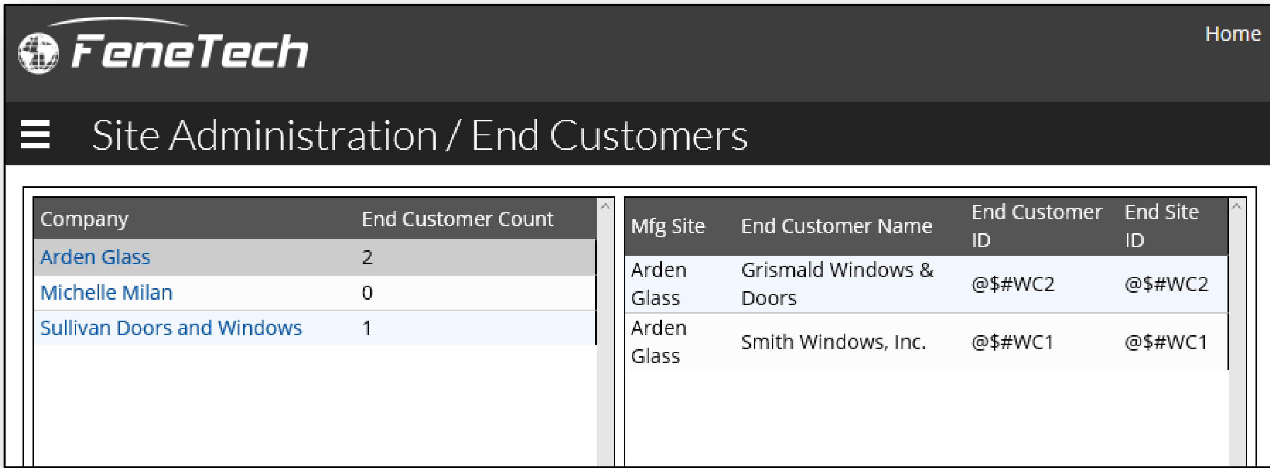
WebCenterSSRSDomain	The domain for the user on the SSRS machine that has permissions to access the SSRS 'Browser'	No
WebCenterManufacturerSamlEntityID	The external url that the customer uses for web center plus "/AuthServices" (ie. http://localhost/wc/AuthServices)	No (if not defined, users will not be able to use Single-Sign-On)
WebCenterPerformOrderLocking	Enables locking of quotes to prevent two people from editing a quote simultaneously. Only works if Web CSR mode is enabled.	No

End Customers

End Customers' (Contractors') details are not visible to FeneVision Web users; however they can be visible through 'Setup' >> 'End Customers'.



Once a Company (Dealer) is selected, a list of its End Customers (Contractors) is displayed. The right side of the screen displays the details for all Contractors for the Dealer.



Documents

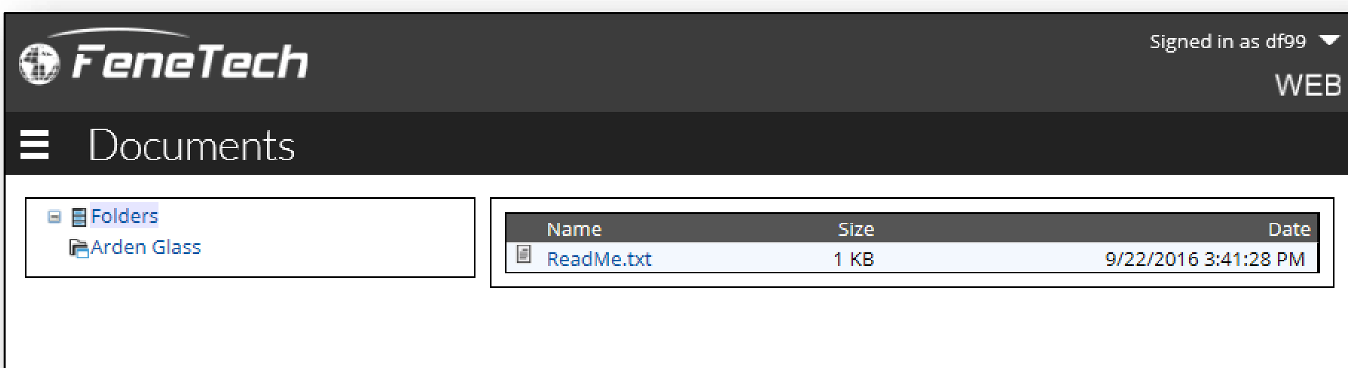
When documents are added to the user's web server, the 'Documents' page becomes visible in FeneVision Web and allows the user to download documents and files from the Manufacturer. This is enabled by adding the 'WebCenterSupportFilesPath' setup parameter under 'Setup' >> 'Parameters' and specifying a directory where the files are located (this must be located on the server where Web is installed). These files may be downloaded by all Manufacturer and Dealer users. The page will not be visible for Contractors.

The Manufacturer can also make folders only visible to a specific customer. To accomplish this, the folder structure below must be followed.

- **Add "_Customers" folder in the support files directory specified with the customerID folder as a sub folder underneath.**

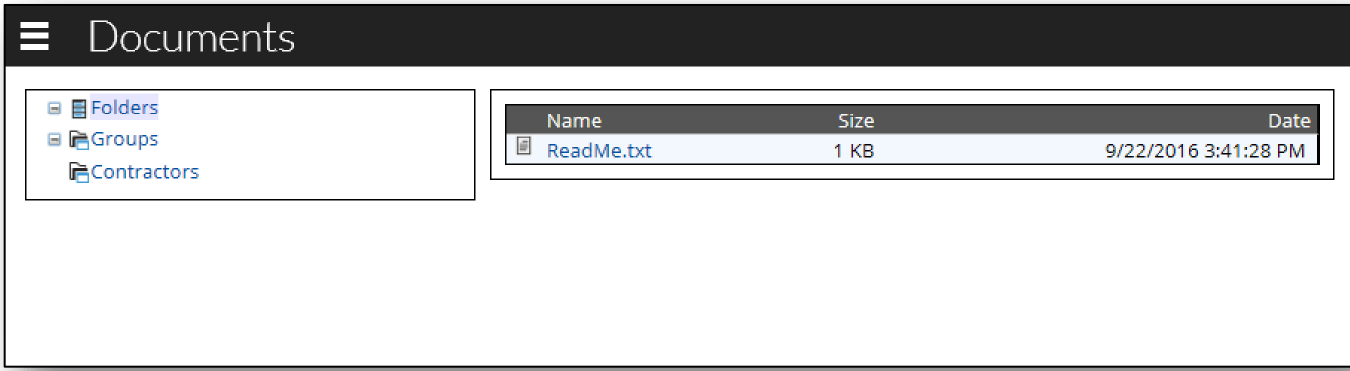
For example, (assuming a customerID of '18'):
<FilesPath>_Customers\18

The customer name is retrieved from the customerID, so from the 'Documents' menu in FeneVision Web, the customer name will display.



Files can also be made available to customers within a specific group. The folder structure depicted below must be configured for this functionality to work.

<FilesPath>_Groups\<CustomerGroupName>



Help

Users can access the most up-to-date user manuals from the FeneVision Core, Tracking, or Trucking applications. See the FeneVision Core user manual for additional steps to access the full user manual directory.

Appendix A

Taking Web Offline

Web can be taken offline so that users may not access it for a period of time. This can be helpful when configuration changes are being rolled out. To make Web inaccessible complete the following.

1. Go to the Web Server, open the ‘Services’ app.
2. Find the service ‘FeneVision Web Data Poller’ and disable it.
3. On the Web Server navigate to C:\inetpub\wwwroot\WC\ErrorPages.
4. Copy the file named ‘app_offline.htm’ and paste it into the C:\inetpub\wwwroot\WC folder.
5. When ready to bring Web back online, remove the file from the WC folder and re-enable the service.