Web-Select® Instructions

1. Go to www.enviro-tec.com, click Software, and choose Web-Select.
2. Enter your username and password. The Project Information screen will be displayed.

To Add a New Project

At any stage during your selection, use the ⓘ icon for useful information and help. **Hint**: If you use a link on a help screen to explore further, use the ALT key and left arrow key to go "back" and the right arrow key to go "forward" Clicking the right button on the mouse will provide a menu so you can print the help page.

1. Enter a New Project

   Enter the project's name in the "New Project Name" field and click the "Add" button. This immediately adds this project to your list; click the "Info" button to input or edit basic information about this project.

   Note: Project names can be duplicated and can also be changed later. Projects cannot be deleted. However, they may be made inactive by un-checking the "Active" button in the Info screen.

2. Create New Line Items

   Click "View Schedule" to add Line Items to the Project.

   The Project Schedule Screen appears where you can view, edit or enter Line Items for your project. The drop down box next to **Project Schedule** allows you to select the product group to be displayed. New items cannot be added when the "All Products" selection is made.

   In this example, we'll be creating a fan coil unit, and will therefore select "Fan Coil Units" in the drop down box. To add a new Line Item, type in the number of line items to create and click the Add New Line(s) button.

   Hint: Once a unit is selected, similar items may be created by making copies of the original. Selections may be copied to the same Project, or to other Projects. Simply check the box for a particular line item, or several line items, scroll to the bottom of the schedule, and click the Copy To button.

3. Selection

   Click "Select" in the General Section of the Line Item to make a selection.
   Hint: For first time users, we recommend that you review the information in the help screen at the top of each selection page. The selection methods available and the information required for each is explained in Step 1, Information on the various coils is explained in Step 2, the available models and coil types presented in Step 3 are explained in the help screen for that step. Step 4 displays the final selection process of available units that meet the criteria you have entered. Step 5 is the summary display of your completed selection.

   a. Enter any required information in Input Screen 1 and then click "Next Step". Enter any required information in Input Screen 2, and then click "Next Step". Use the ⓘ icon for information on selection methods and other inputs.

   b. On the Coil Alternatives screen (Step 3), select your desired coil(s) and click "Next Step".

   c. On the "Possible Unit Sizes" screen (Step 4), review the performance data for each unit size and select the best choice. Then click the "Submit" button.

   d. You will be presented with your Selection Results. You may print the selection by clicking the "Selection Summary, Print View" button at the bottom of the Selection Results screen. This will convert the selection into a printer friendly format, at which time you can go to File - Print in your browser to print the document.

   e. Options and Accessories – If you wish to select the options and accessories for this unit, click the "Select" button next to **Accessories** on the Selection Results Screen. To print the Options/Accessories, use the "Options Summary, Print View".

   f. Save your Selection to the Project Schedule by clicking "Save to Schedule" button.

4. Share your Project

   You may wish to share your project with other Engineers in your office *or with your ETI Rep for review and quick quotes*. At the Project Schedule click "User" in the Navigation Bar. This will list he Users able to access the Project you are currently signed on to. Edit existing users or add new users on this screen. Users must first be set up in the system before they can be assigned to a project. See "Add a New User" below. To find an existing user ID, use the search function at the User Administration Screen.

Hint: To send an email to a project user, click the email hyperlink on this screen to open a message box in your email program.

5. Add a New User

From the Software menu, choose Manage Website Accounts, then User Administration. To create a new user, enter a unique user ID (suggestion – use the person's first initial and last name, or their full name). The new name will appear in your list. Click "edit" next to a user's ID to add the requested information. NOTE: the user is "inactive" until the "Active" button is checked on the edit screen.

Other Helpful Hints

System Navigation Hints

On many screens a Navigation bar allows you to go directly to some of the screens - "All Projects" takes you to a list of your projects; "users" is where you add users to your project, "info" is where additional information about the project can be entered or reviewed.

Sample Navigation bar: All Projects > Project 1 [Info] [Users] [Quotes] [Orders] > Project Information

No Project Mode / User Mode - How to use

On the Project Information Screen (the first screen), click the link for No Project Mode. This displays a list of items you have created (or copied from other projects) that are NOT associated with a project. Use this list for testing the program, storing items you may use a lot and want to then copy to a project or having a place to try out selections before putting them in a project. Items in the User Mode cannot be shared. They can only be viewed and edited by you.

Sort Columns on a Schedule

Clicking on the column title will sort the whole schedule based on that column - first in ascending order and if clicked again in descending order. Suggestion: Use tag numbers that will sort properly. For example, use FCU-01 if there will be more than 9 FCUs. TAG numbers can be changed by using the "edit" link above the item line number on the Project Schedule.

Configuring Engineering Schedule

You can customize the look of the engineering schedule by hiding columns. Click "Configure Custom Views" in the Project Schedule screen. This will allow you to create a schedule view that displays only the columns you wish to see (a few columns are always present and cannot be removed). Check or uncheck the box on each column to add/delete it from this view. Provide a unique name for this view and save your selection. This custom view is available to you on any project you are viewing for products of the same type. Create as many views as you need.
Note: The system has a "default" schedule view for each product type and coil type.

System Warnings and Error Messages - What to do

Some messages are in pop-up boxes, and when "OK" is clicked, they disappear and you are returned to the input screen. Other errors are found when actually running the selection program and return a full page explaining the error. Read the message and use the browser's Back button to return to the input screen. Help and Information screens on the input screen will assist you in correcting the error.

Log-in and User Information - how to Change

From the Software menu, choose Manage Website Accounts, then User Administration. Your user name is a hyper-link; click it to edit your information, or click "Edit" next to a user you created to change their information. You can set the time out and permission levels for your child users, but you cannot change your own. If you have trouble logging in, please call your ENVIRO-TEC representative.

Child Users

New users that you add are your "Child Users". You can edit or change their information, including the minutes before they time out, and their permission levels. You cannot create a user with greater permission levels than you have.

Find a Project - (Active, Inactive, Archived, User Mode)

From the "Project Information" Screen, scroll down to see the "Project List Filter". Use this to shorten the list to only projects you wish to see or use now. Projects that are no longer active should be marked "inactive" on the project info screen and are only viewed when you select the "No Status Filter" option.

Printing / Exporting Engineering Schedules
Always use the print icon at the top to display a “print friendly” view before printing. Currently, you may document the schedule using three possible methods:
1. Use your browser’s Print button to print the schedule to a page. Set the printer to landscape mode before printing. You may have to hide more columns to fit the schedule on 8.5” x 11” paper. Also by using a smaller text size on your browser (View > Text Size > Smaller or Smallest) you will fit more of the schedule on a standard page.
2. Select the schedule table with your mouse and Copy (CTRL+C) and Paste (CTRL+V) the schedule into an Excel spreadsheet or other Windows application, or
3. Save the page to an HTML file by selecting the browser ’s “Save As...” menu item (under the “File” menu) and saving the page to a local hard drive.

Thank you for using Web-Select®!