wl·èLJl·ʅ ·wl·è Platform

User Guide

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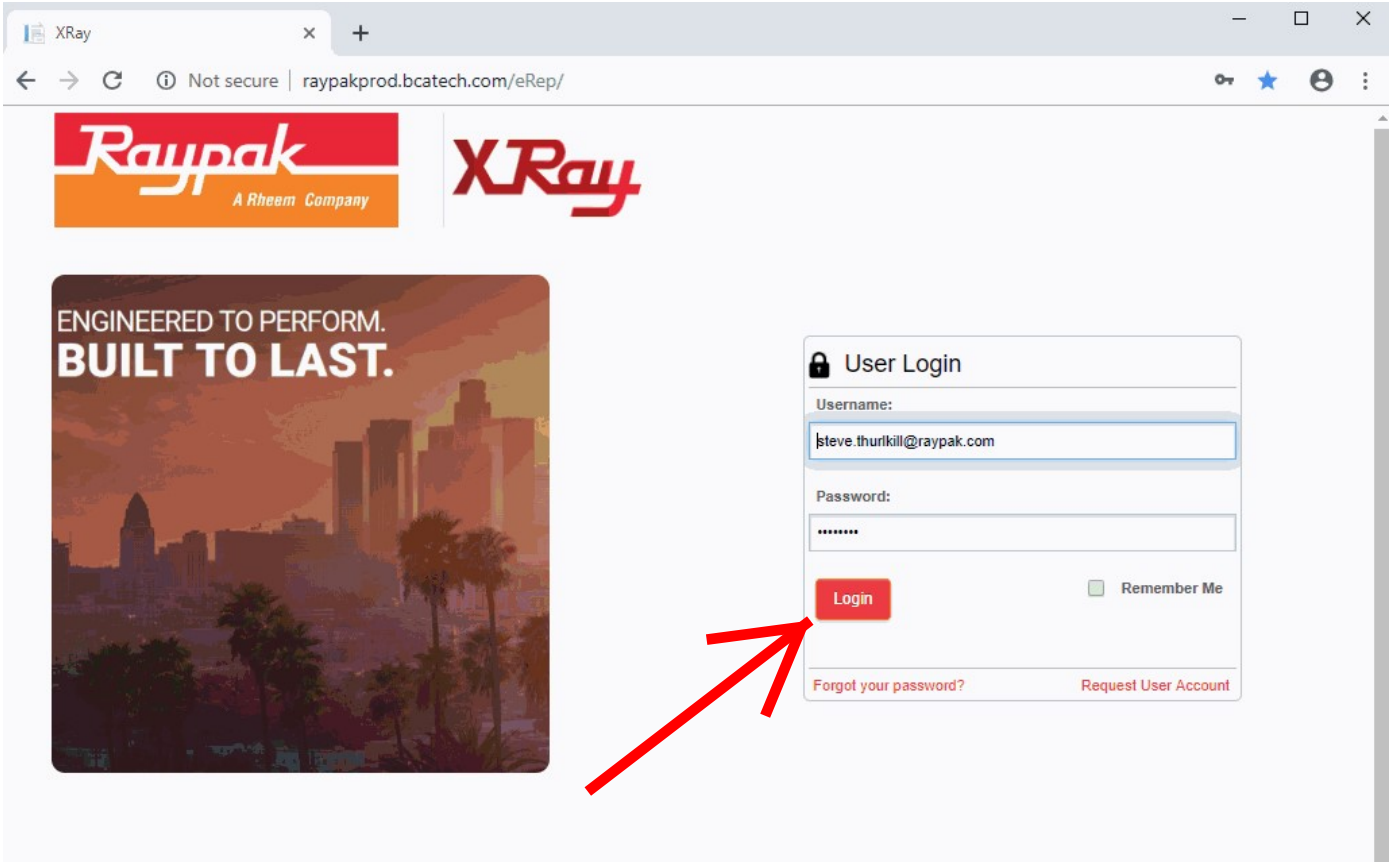
INTRODUCTION

This document is a basic guide on using the Raypak XRay Platform. It describes how to log on to the site, make a selection, price a unit, create a quote, order and prepare a set of submittal documents.

LOG ON TO THE SITE

In order to use the site, the user must first have a user account. Users without accounts may request an account from the logon page by clicking the Request User Account link at the bottom right of the login page.

Users with an established account may logon using their user account and password. To logon to the site, navigate to xray.raypak.com.



Enter your user name and password and click the Login button. The process of requesting a user account may be found elsewhere in this document in a section entitled Requesting a User Account.

MY DASHBOARD

Once you are logged on to the site you will be redirected to the main dashboard page as shown in the figure below.

From the main dashboard page you are able to view your projects and various other items. Depending upon your user account privileges/level other items may appear on your dashboard that will provide statistical information regarding your account.

CREATING A PROJECT

The first step in using the Raypak XRay Platform is to create a project. To view a list of your projects click on the MY PROJECTS menu at the top of the menu bar as shown in the figure below.



Figure 2 - Creating a project

You will be redirected to the My Projects page where the system will display a list of active projects. To create a new project, enter a project name in the New Project Name text box and click the Add New button. Project names may not be duplicated. If you attempt to create a new project with the name of an existing project you will receive an error message. See the figure below for an example.

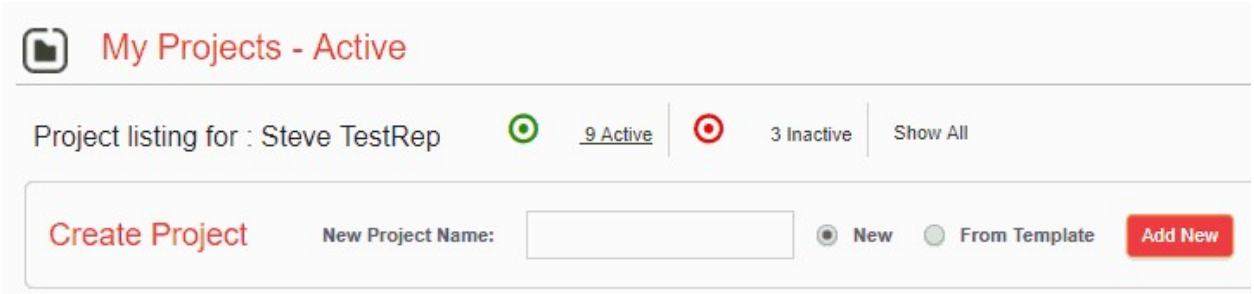


Figure 3 - Project creation

When the new project is created, you will be redirected to the Project Information page which allows you to set properties and basic information about the project.

Items with a red * are required to be filled out to save or update the project. See the figure below.

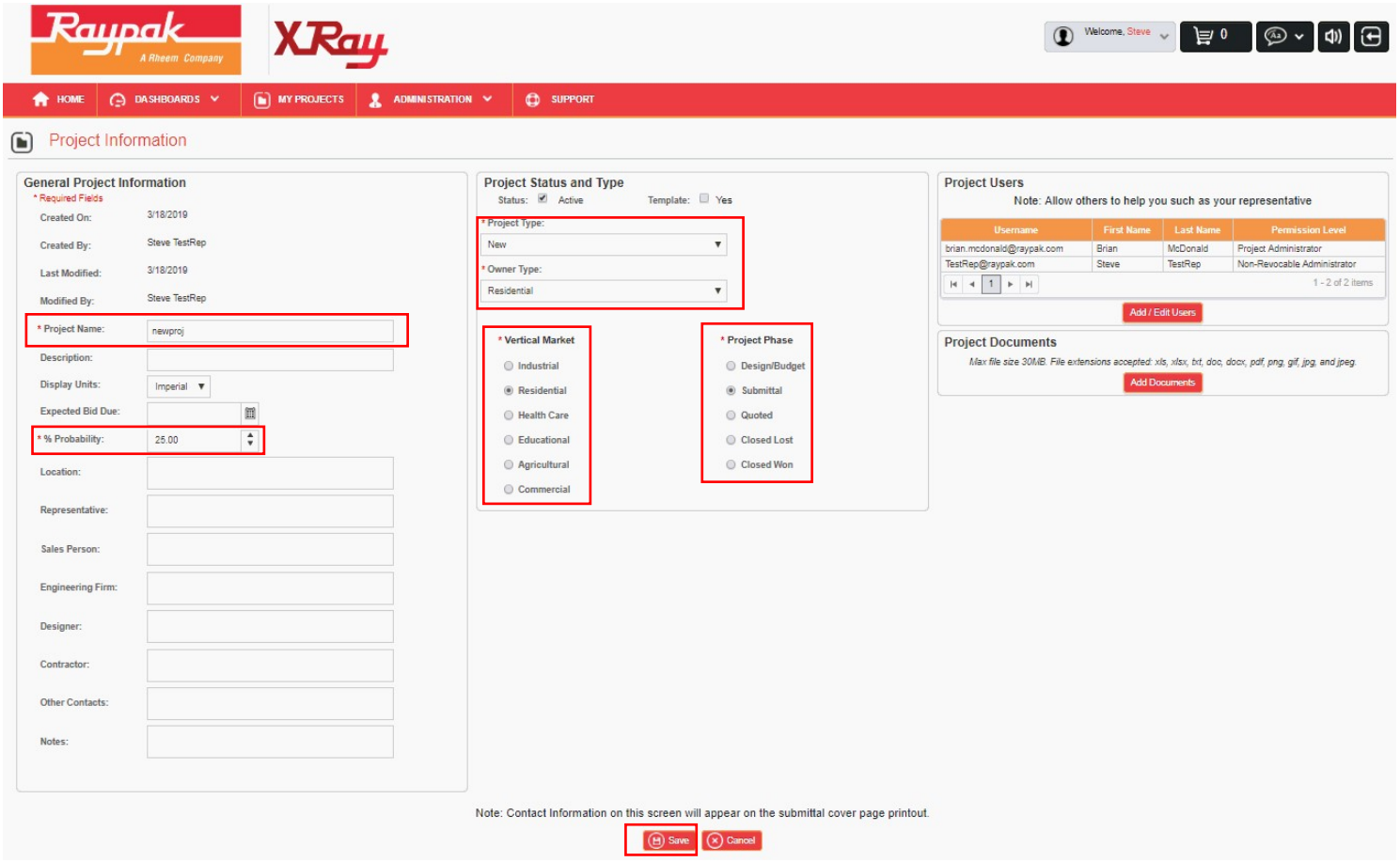


Figure 4 - Updating project details

Click the Save button to save the project information. You will be returned to the Project Schedule page.

MAKING A SELECTION

The next step in the process is to make a selection. Making a selection refers to the process of picking a product, selecting attributes related to the product, and adding it to a schedule.

To make a selection from the Project Schedule page, select the Product Family,
Model type and optionally, a quantity from the Project Schedule page as shown in the figure below.



Figure 5 - Making a selection

Click the Add button.

The product selected will be added to the Project. You will be redirected to the product selection page. The information displayed on this page will be specific for the type of product you selected. In this example a boiler was selected.

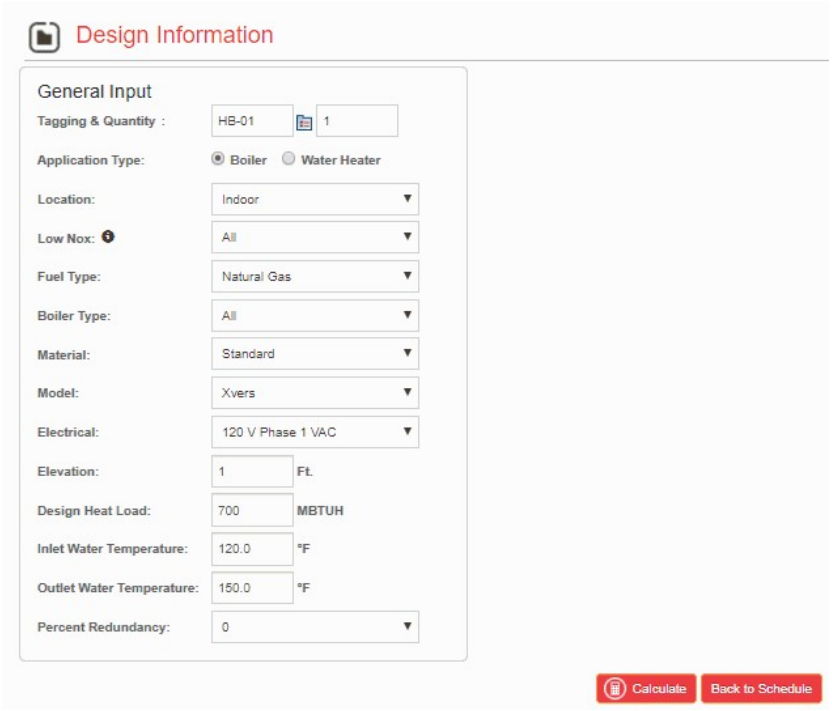
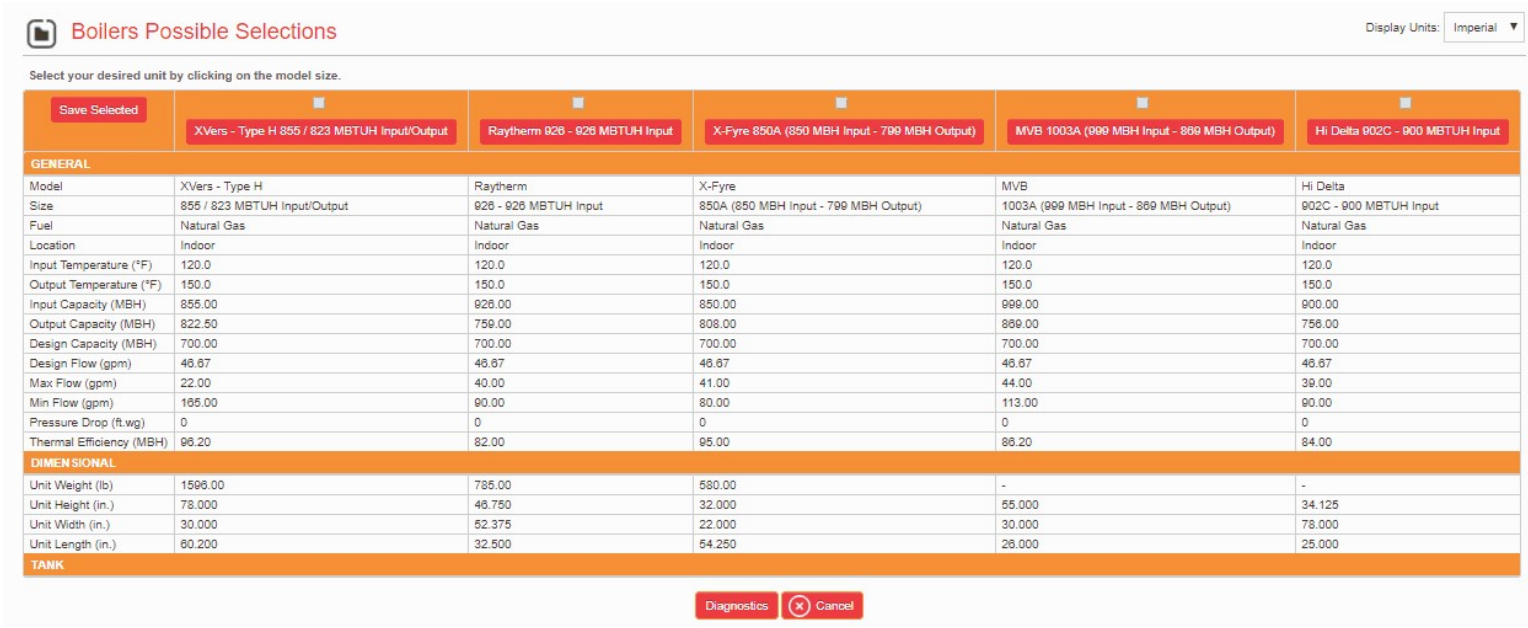


Figure 6 - Selecting a unit

Enter the selection parameters you desire and click the Calculate button.

Using the parameters you have entered, the system will generate a list of units that meet your selection criteria. Select the unit that most closely matches your desired unit. Click the button with the model number you desire or click the Cancel button to return to the schedule without a making a selection.



Boilers Possible Selections

Display Units: Imperial

Select your desired unit by clicking on the model size.

Save Selected	XVers - Type H 855 / 823 MBTUH Input/Output	Raytherm 926 - 926 MBTUH Input	X-Fyre 850A (850 MBH Input - 799 MBH Output)	MVB 1003A (999 MBH Input - 869 MBH Output)	Hi Delta 902C - 900 MBTUH Input
GENERAL					
Model	XVers - Type H	Raytherm	X-Fyre	MVB	Hi Delta
Size	855 / 823 MBTUH Input/Output	926 - 926 MBTUH Input	850A (850 MBH Input - 799 MBH Output)	1003A (999 MBH Input - 869 MBH Output)	902C - 900 MBTUH Input
Fuel	Natural Gas	Natural Gas	Natural Gas	Natural Gas	Natural Gas
Location	Indoor	Indoor	Indoor	Indoor	Indoor
Input Temperature (°F)	120.0	120.0	120.0	120.0	120.0
Output Temperature (°F)	150.0	150.0	150.0	150.0	150.0
Input Capacity (MBH)	855.00	926.00	850.00	999.00	900.00
Output Capacity (MBH)	822.50	759.00	808.00	869.00	756.00
Design Capacity (MBH)	700.00	700.00	700.00	700.00	700.00
Design Flow (gpm)	46.67	46.67	46.67	46.67	46.67
Max Flow (gpm)	22.00	40.00	41.00	44.00	39.00
Min Flow (gpm)	165.00	90.00	80.00	113.00	90.00
Pressure Drop (ft.wg)	0	0	0	0	0
Thermal Efficiency (MBH)	96.20	82.00	95.00	86.20	84.00
DIMENSIONAL					
Unit Weight (lb)	1596.00	785.00	580.00	-	-
Unit Height (in.)	78.000	46.750	32.000	55.000	34.125
Unit Width (in.)	30.000	52.375	22.000	30.000	78.000
Unit Length (in.)	60.200	32.500	54.250	26.000	25.000
TANK					

Diagnostics | Cancel

Figure 7 - Viewing possible selections

Once you have selected a unit, the system will redirect you to the Selection Summary page where all the manufacturer's details related to the unit are displayed. If you click the Back to Schedule button you will be returned to the Project Schedule page. If you click the Re-Select button you will be able to make modifications to your selection criteria and re-select using different selection values. Unless you wish to make changes, click the Back to Schedule button.

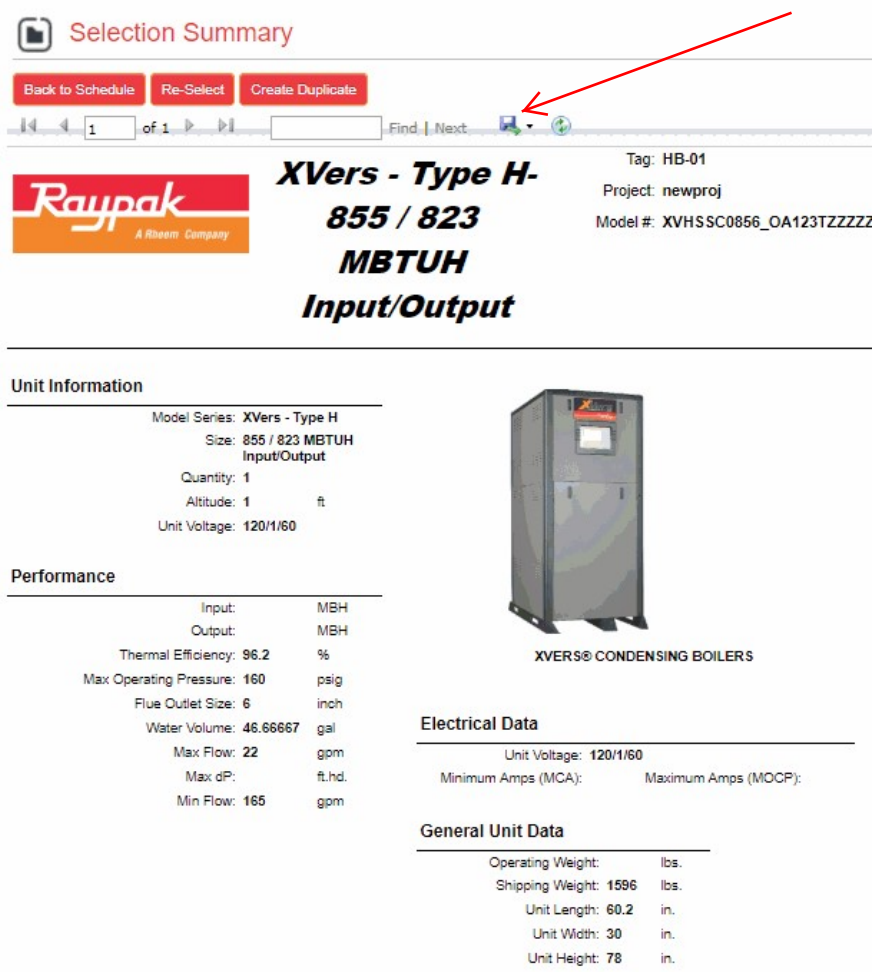


Figure 8 - Viewing Selection Summary

You may click the Export button at the top of the Selection Summary to export the document to a variety of file formats including PDF. If you are satisfied with the resulting selection, click the Back to Schedule button. If you wish to modify the selection criteria and reselect a different unit, click the Re-Select button. If you wish to make a duplicate of the unit you selected, click the Create Duplicate button.

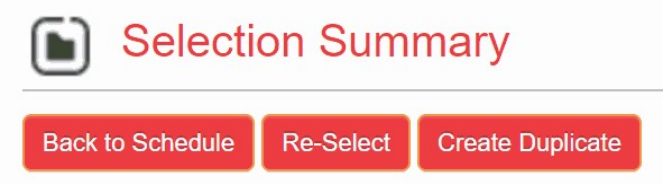


Figure 9 - Selection Summary Options

PRICING A UNIT

A unit must be priced prior to adding it to a quote or order. To price a unit, click the Price icon from the Project Schedule page for the unit desired. See the figure below.

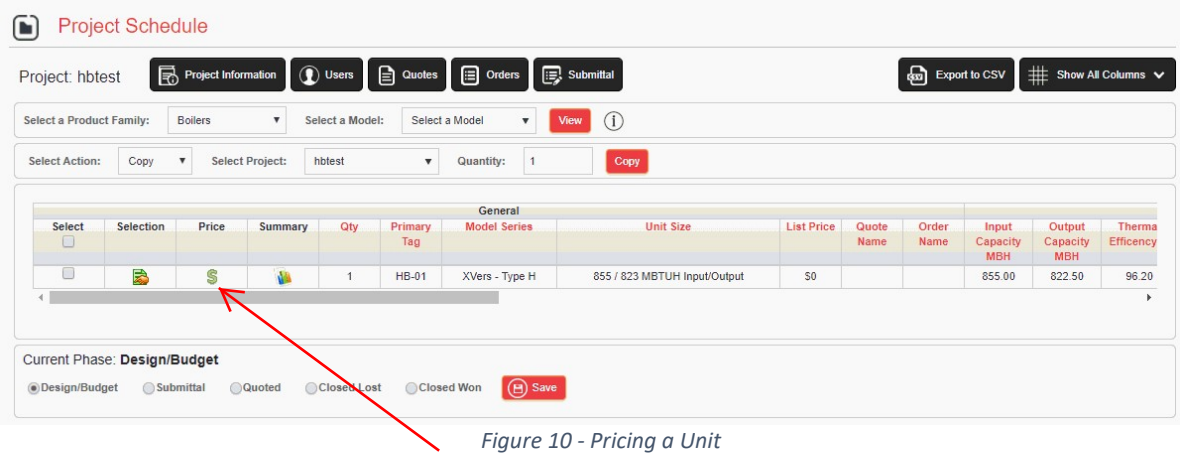


Figure 10 - Pricing a Unit

You will be redirected to the Pricing page as shown below. The options shown will depend on the unit selected. Required options are displayed with a yellow background

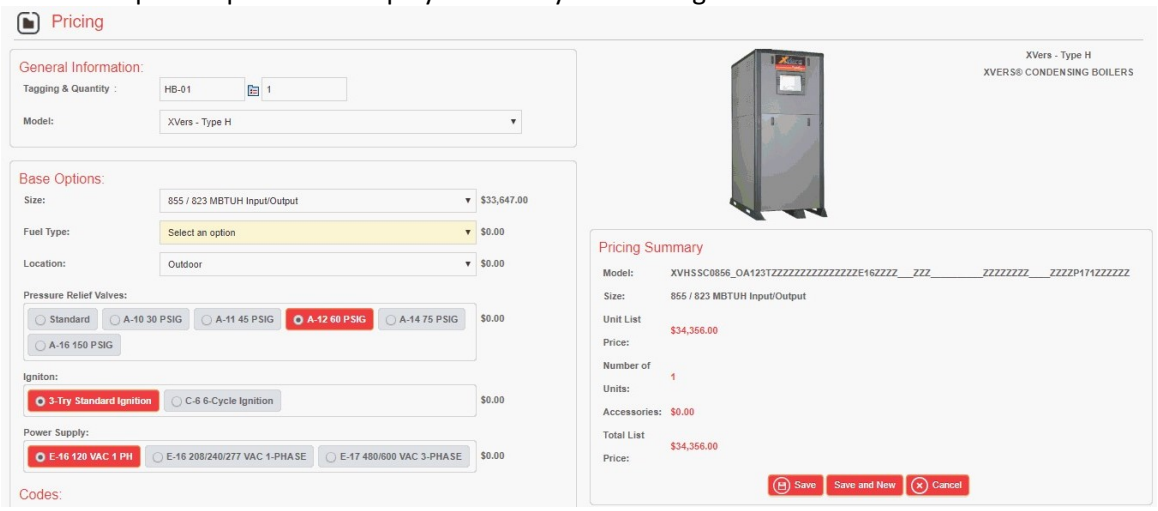


Figure 61 - Adjusting pricing options

From here you may enter tagging information, select product options and make changes to the product specifications. The page will dynamically update the Pricing Summary section when any changes are made.

The system also updates the Model code dynamically to create the correct order string code that corresponds to the model with the options selected.

From the pricing page, it may be possible to add accessories to the line item by clicking the Edit button in the Accessories panel (if available). The system will display a list of accessories that correspond to the type of item selected.

Select the accessories desired by the Edit button in the Accessories grid header.



Figure 72 - Adding accessories

A pop-up window will appear that will display the available accessories for the product type. Select the accessory or accessories that you wish to add by clicking the plus sign (+) in the Add column for each accessory that you want to add.

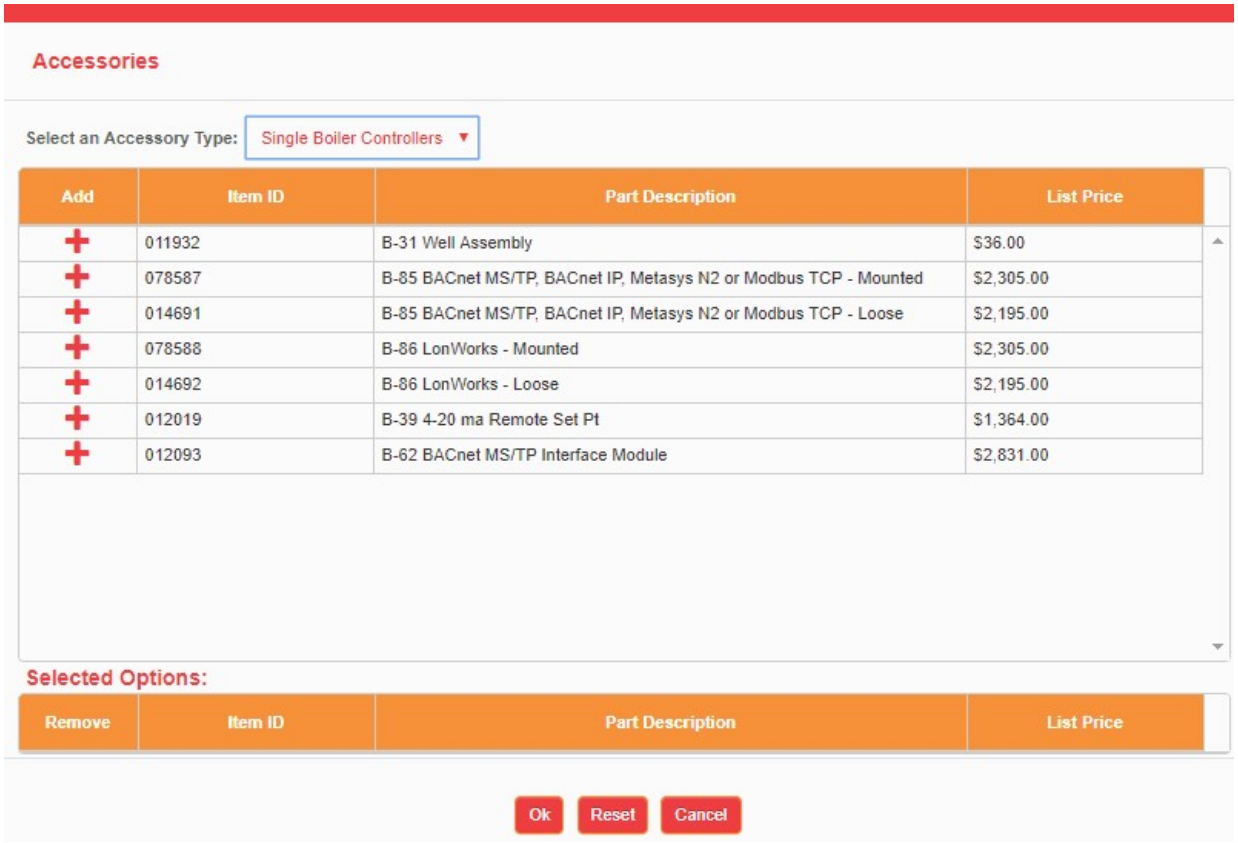


Figure 83 - Adding an accessory to a line item

The accessories will be added at the bottom of the pop-up.



Figure 94 - Accessories added to a line item

Click the minus sign (-) to remove an accessory from the pop-up. Once you are done, click the OK button to save the selections and return to the pricing page. If you wish to remove all the accessories associated with the line item, click the Reset button. To discard any changes you may have made and return to the pricing page, click the Cancel button.

The accessory(ies) will be added to the bottom of the Accessories pop up. If you wish to delete an accessory, click the minus sign next to the accessory.

Click the Save button to save your changes and return to the Project Schedule page.

CREATING A QUOTE

Creating a quote is the process of adding priced line items to a quote. Any number of items may be added to a quote and eventually converted to an order after customer approval.

To add line items to a quote from the Project Schedule page, select the line item from the grid by clicking the check box next to the line item and select the Quote item from the Select Action drop down list box as shown in the figure below. Select the New item from the Select Action drop-down list and then click the Create Quote button.

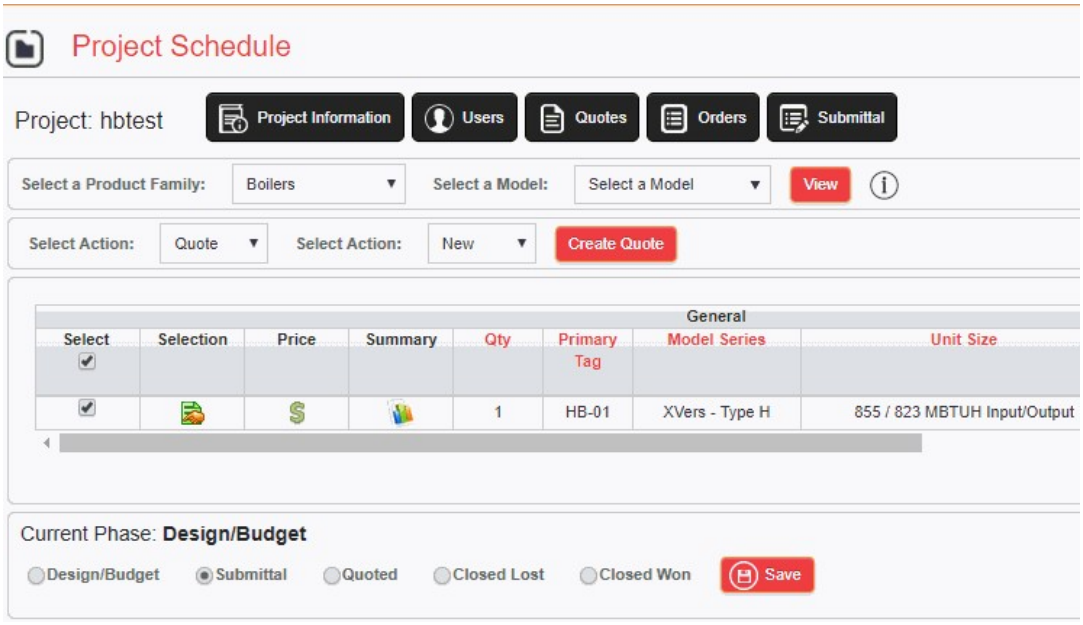


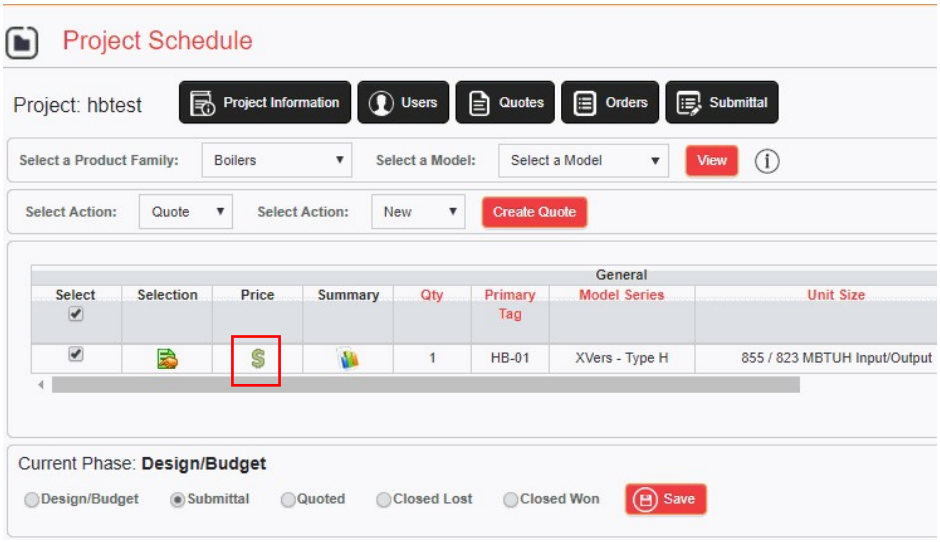
Figure 105 - Creating a quote

ADDING LINE ITEMS TO AN EXISTING QUOTE

In addition to adding line items to a new quote, it is possible to add them to existing quotes or orders. To add a schedule item to an existing quote, navigate to the project schedule where the line item exists, select the item and then select the following items in the toolbar

- Select Action → Quote
- Selection Action → Existing
- Select Quote → Name of quote to which you wish to add item

Click the Add item to make the line item part of the quote. See the figure below for an example.



Line items can only be added to quote if they are not associated with another quote or order. Line items must have a price associated with them before they may be added to a quote or order. If you attempt to add a line item to a quote or order without it being priced, you will receive the following error message.

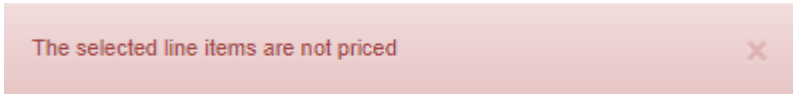


Figure 127 - Error message informing the user that the item must be priced

QUOTE WORKSHEET

At this point, a new quote will be created with the line items selected from the Project Schedule. You will be redirected to the quote. The quote page will look similar to the following figure.

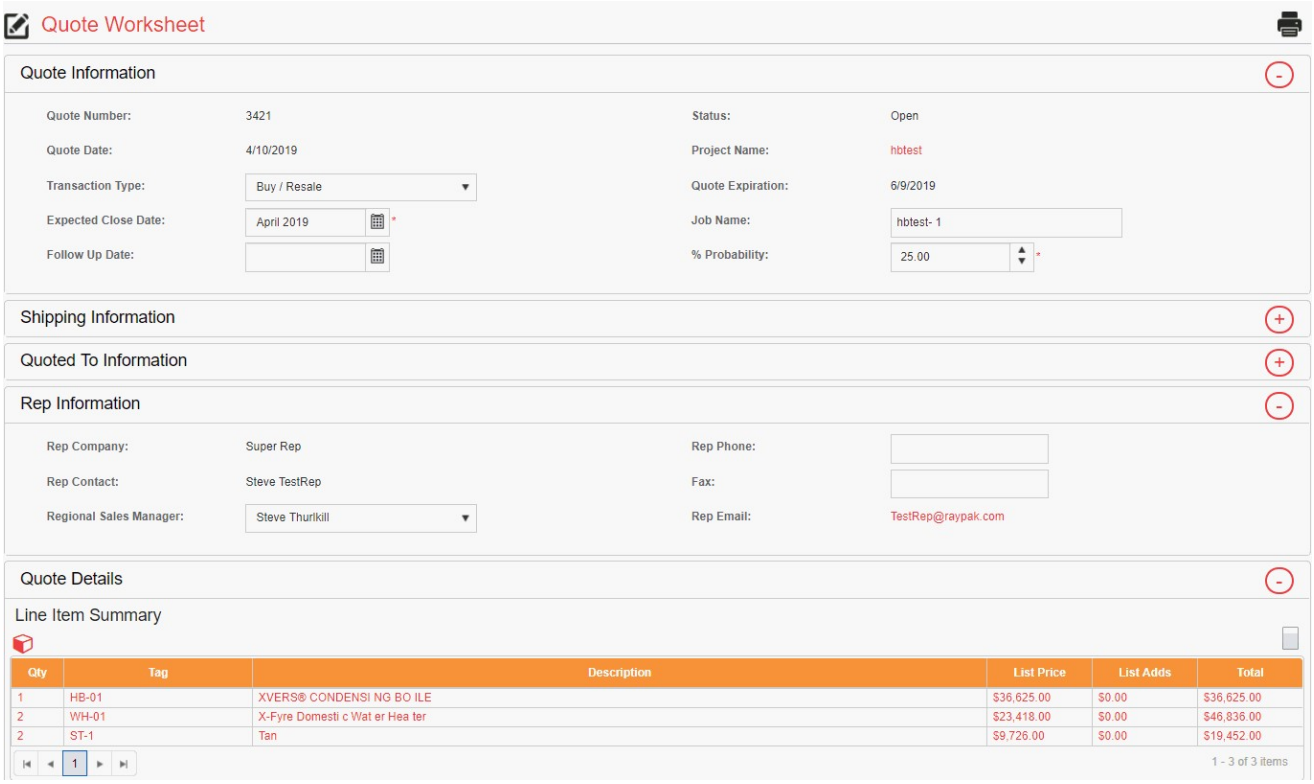


Figure 138 - New Quote

The Quote page is divided into several sections and each section is collapsible to allow the quote to fit on smaller screen devices.

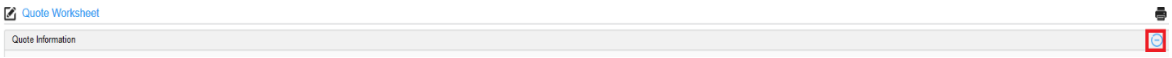


Figure 149 - Collapsing and expanding quote sections

To collapse a quote section, click the minus sign at the far right of the section header as shown in the figure above. Each section of the quote allows the user to specify the particulars for the quote and controls how the quote will be applied or allows the user to configure specific options for the quote.

Once the quote is configured as desired, click the Save button at the bottom of the quote page to save the it and return to the Project Schedule page. If you wish to convert the quote to an order which may be submitted to the factory click the Create Order button. If the quote requires review by the Application department, click the Request Engineering Review button. This option is explained in more detail in the engineering review section.

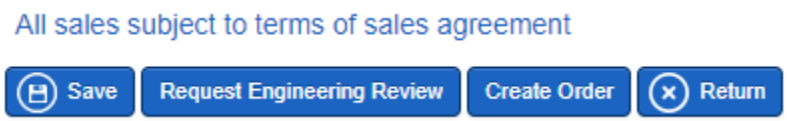


Figure 20 – Quote action buttons

If you click the Create Order button you will be prompted to confirm the creation of a new order as shown below. Converting a quote to an order saves time as it allows the user to take an existing quote and copy all the line items, accessories and other related items to a new Order without having to create the order from scratch.

Converting a quote to an order is a one-time process and it is not possible to make modifications to the quote after it has been converted to an order.

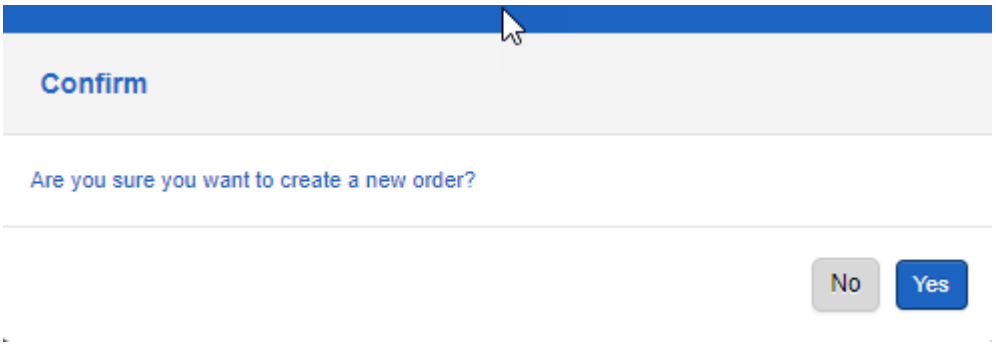


Figure 151 - Converting a quote to an order

Click the Yes button to convert the quote to an order. Clicking the No button dismisses the pop-up and returns the user to the quote worksheet.

ORDERS

Once a quote has been converted to an order, you will be redirected to the Order Worksheet page. The Order Worksheet page is similar to the Quote page and has many features and properties in common. Orders may be submitted to the factory, whereas Quotes may not.

An Order is usually the last document created in the project process and should be thought of as the final step in the project creation process.

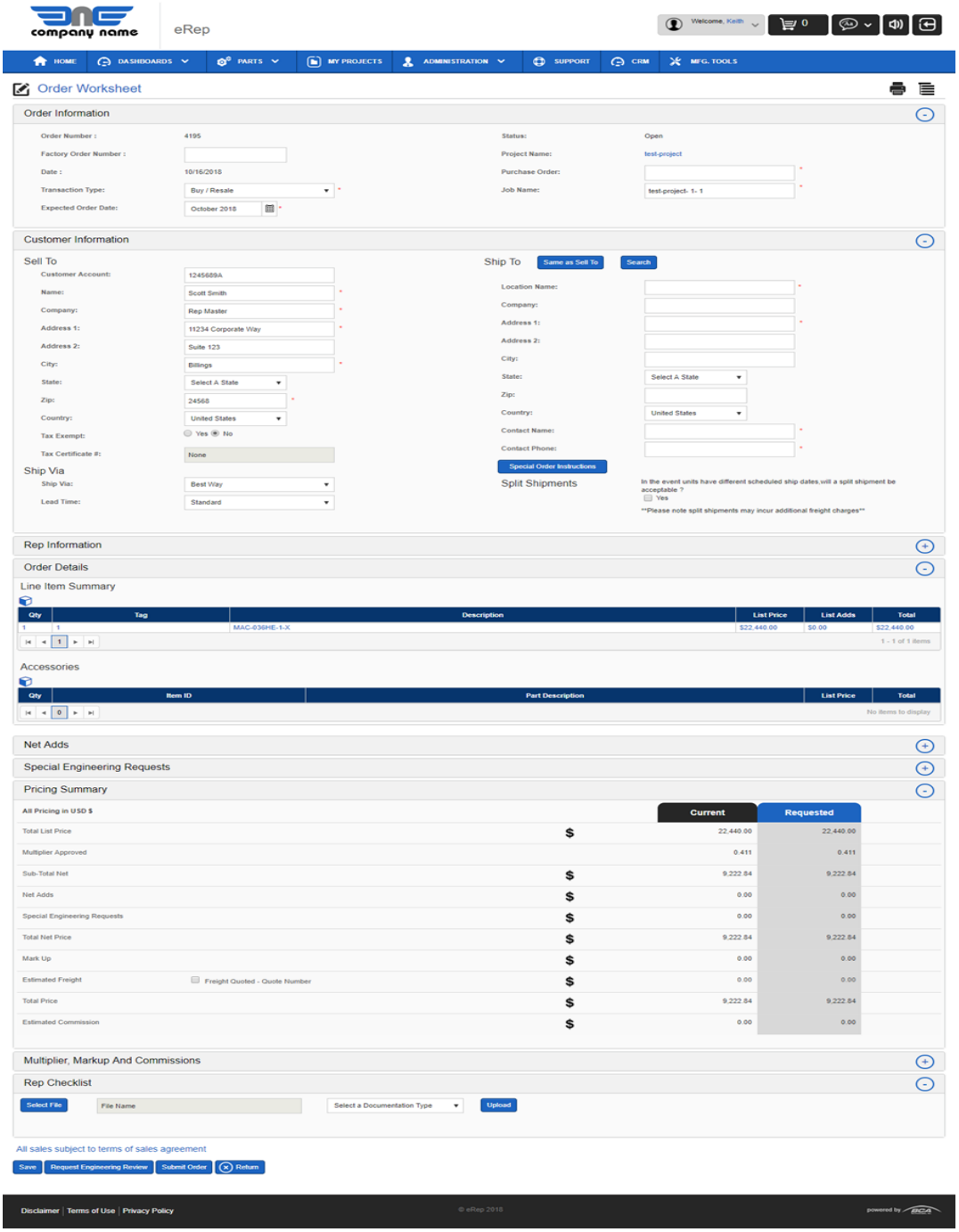


Figure 162 - New Order Page

Orders have more sections than quotes and allow the user to specify additional options that are related to the customer or location where the order is to be shipped. In addition, a section for project documents has been added under the Rep Checklist section.

Once the order properties have been set, click the Submit Order button to submit your order to the factory for processing. You will be asked to confirm the submittal process. Click the Yes button to submit your order to the factory for processing.

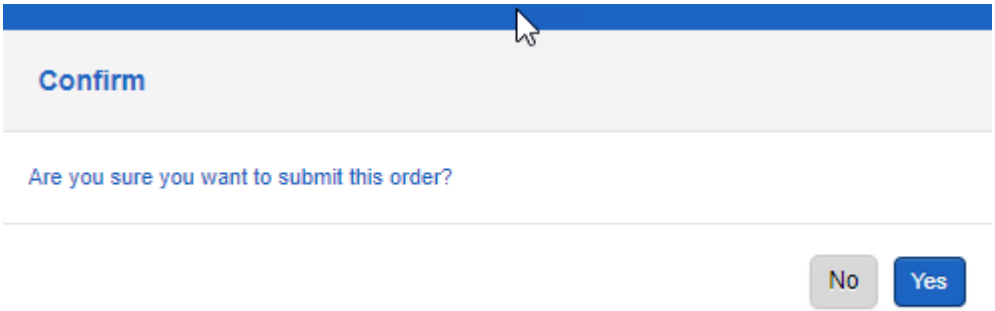


Figure 173 - Submitting an order

ENGINEERING REVIEW

Users may also submit their orders to the factory engineering department for review prior to submitting the order to the factory for processing. To have the engineering department review your order, click the Request Engineering Review button at the bottom of the order page. A pop up message will be displayed which will allow you to enter a message that will be forwarded along with your request for review to the engineering department.

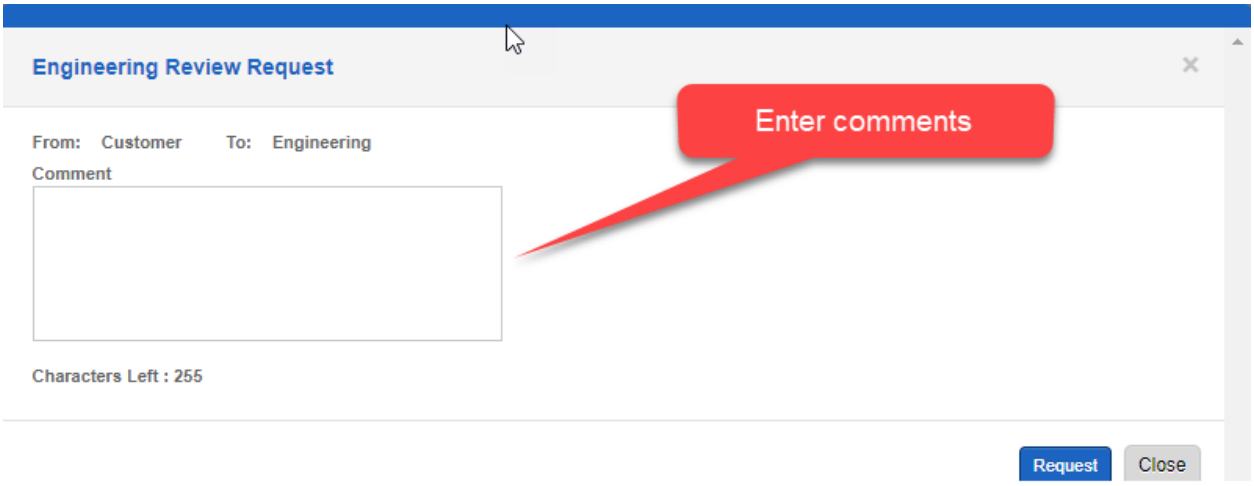


Figure 184 - Sending an order to the factory engineering department for review

Once your request has been reviewed, the engineering department will send the order back to you. An e-mail message will be sent letting you know the request has been reviewed.

SUBMITTALS

A submittal is a set of documents that you may print or export and contains documents related to all the items you have in your project.

To create a submittal, click the Submittal icon from the My Projects page as shown below.

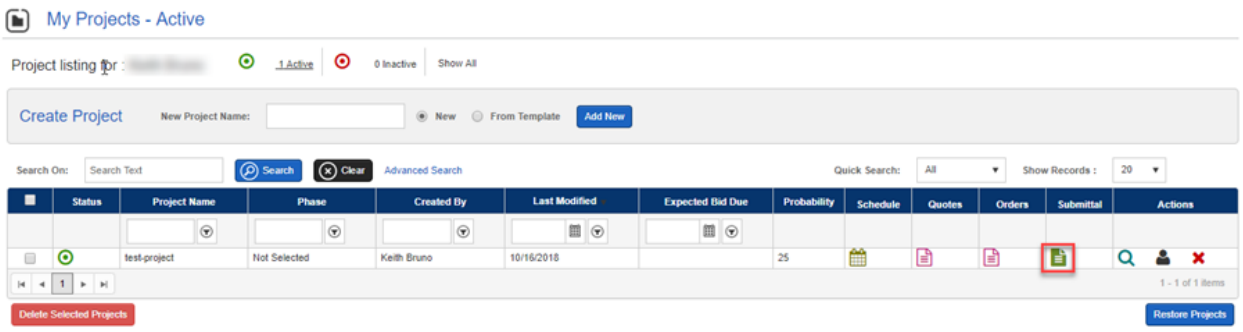


Figure 195 - Generating a submittal document set

Once you are redirected to the Submittal Generator page, select the product family from the Product Family drop down list box and select the options you wish to create for the submittal package. Common options include Cover Pages, Performance Datasheets, Wiring Diagrams and others. Select the options you wish to include in your package and click the Generate Submittal button. The options available for a particular eRep™ application may vary.

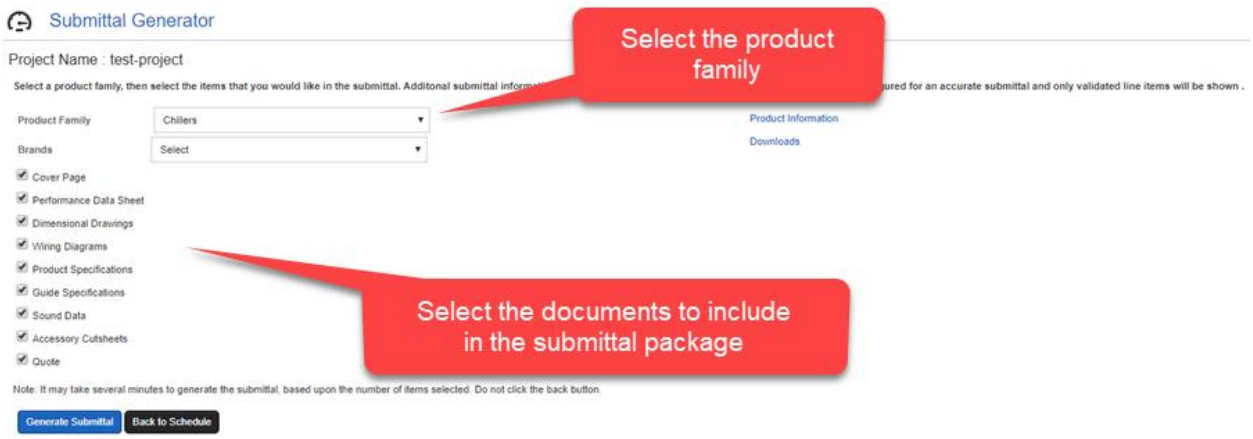


Figure 206 - Generating a submittal package

The submittal package will be created.

You may save the package to your local computer by clicking the Export button at the top of the page.

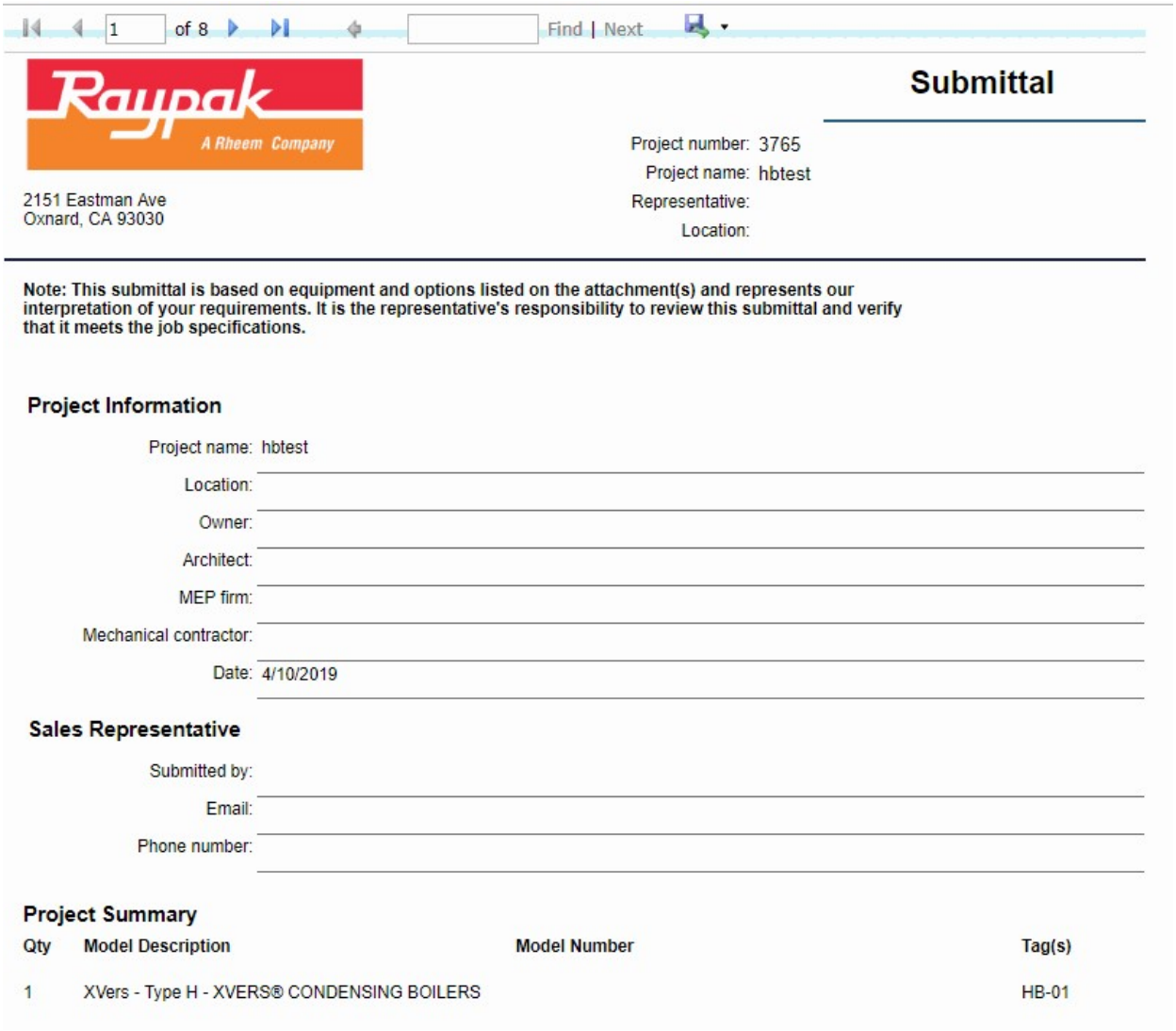


Figure 217 - Sample submittal package

USER ADMINISTRATION

User administration refers to the process of creating or managing user accounts that have access to the XRay Platform. As mentioned at the beginning of this document, each person using the system must have a user account prior to using the application.

Users may receive an account in one of two ways; accounts may be requested, or administrators may create an account for the user.

REQUESTING A USER ACCOUNT

New users to the XRay Platform may request a user account by clicking the “Request User Account” link from the login page.



Figure 228 - Requesting a user account

The user will be redirected to the Request User Account page. Once the form is filled out, the “Request Account” button must be clicked which will submit the request to the System Administrator.

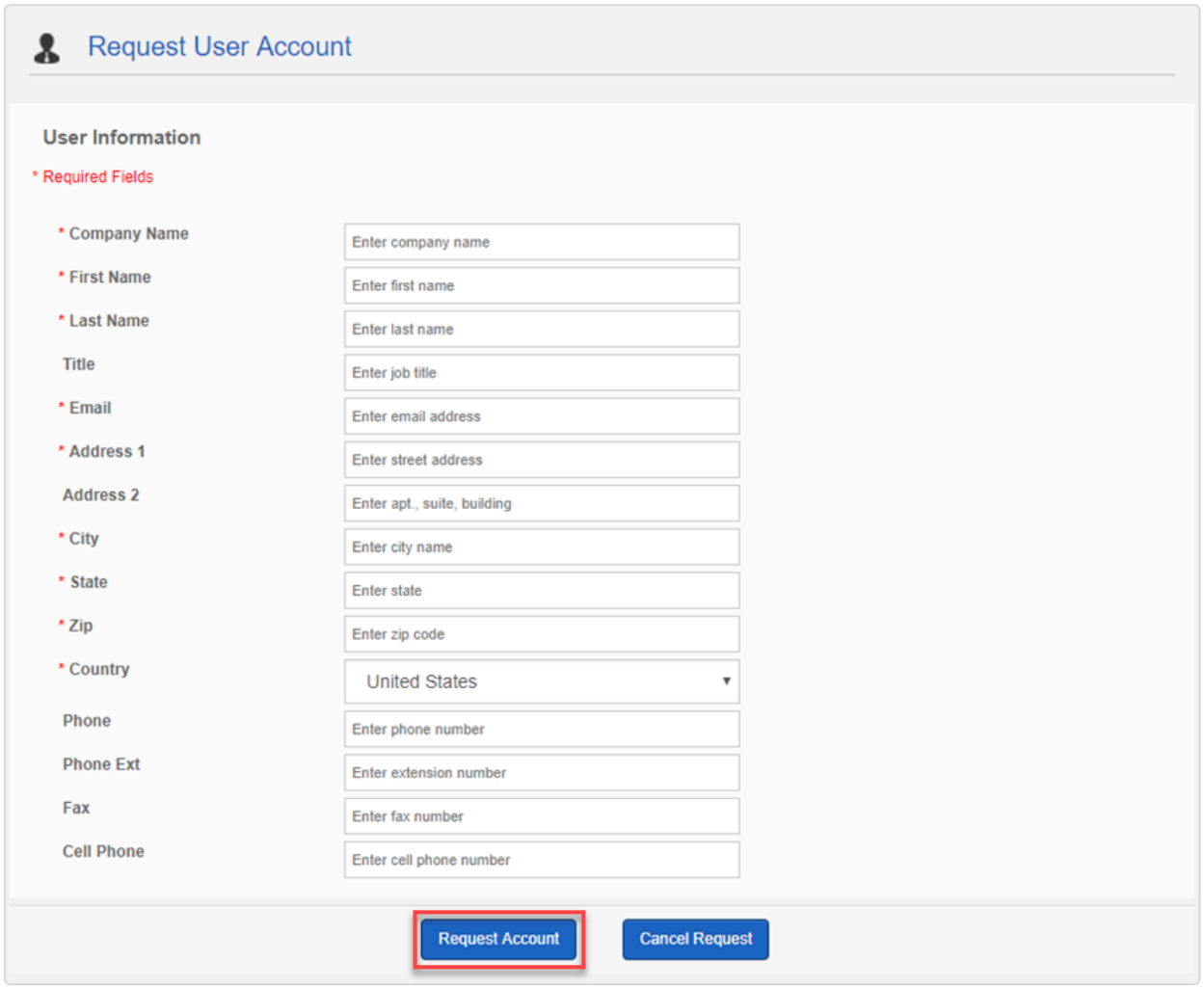


Figure 29 - Requesting a new user account

The System Administrator will receive a notification regarding the new user account request. Once approved, the user will receive an e-mail with a link to reset their password. After resetting the password, the user will now be able to login to the XRay Platform.

SUMMARY

This document provided basic information on the use of the Raypak XRay Platform. It reviewed the project creation, line item selection, quoting, ordering process and submittal document creation process.