DW Connect - Portal

User Guide

Rev: 10/25

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Overview

Audience and Scope

The DW Connect Portal is used to manage Channel Partners, Organizations, and the available Subscription Services. The DW Connect Portal does not provide access to any Site devices, video data, or VMS settings.

Key Concepts

The Enterprise Edition VMS introduces a new hierarchical structure that enables optimized configuration controls and new accounting models that increase operating margins and reduce management overhead.

Channel Partners

A Channel Partner resides at the top of a VMS deployment, where they set the price and availability of Subscription Services to their sub-Channel Partners and directly reporting Organizations.

The DW Connect Portal allows Channel Partners to manage their accounts, track Subscription Service usage, and set prices for Services without connecting to individual VMS Systems.

Organizations

Organizations are created by Channel Partners using the DW Connect Portal. An Organization is a customer of the Channel Partner who manages one or more Sites (Systems) as a single entity.

While Channel Partners set the price for all Subscription Services available to an Organization - it is the Organization Administrator who uses the Cloud Portal, not the DW Connect Portal, to configure the Organization, manage organization-level users, and grant the Channel Partner access to the Organization.

See the Organization Administrator User Guide for additional information about managing an Organization.

Sites and Systems

A Site is one or more Servers treated as a VMS deployment or installation. The term Site will eventually replace the term System that has historically been used, and both should be treated as equivalent as both terms may be seen in dialogs, menus, and user interface elements during the Gen 6 rollout.

Subscription Services

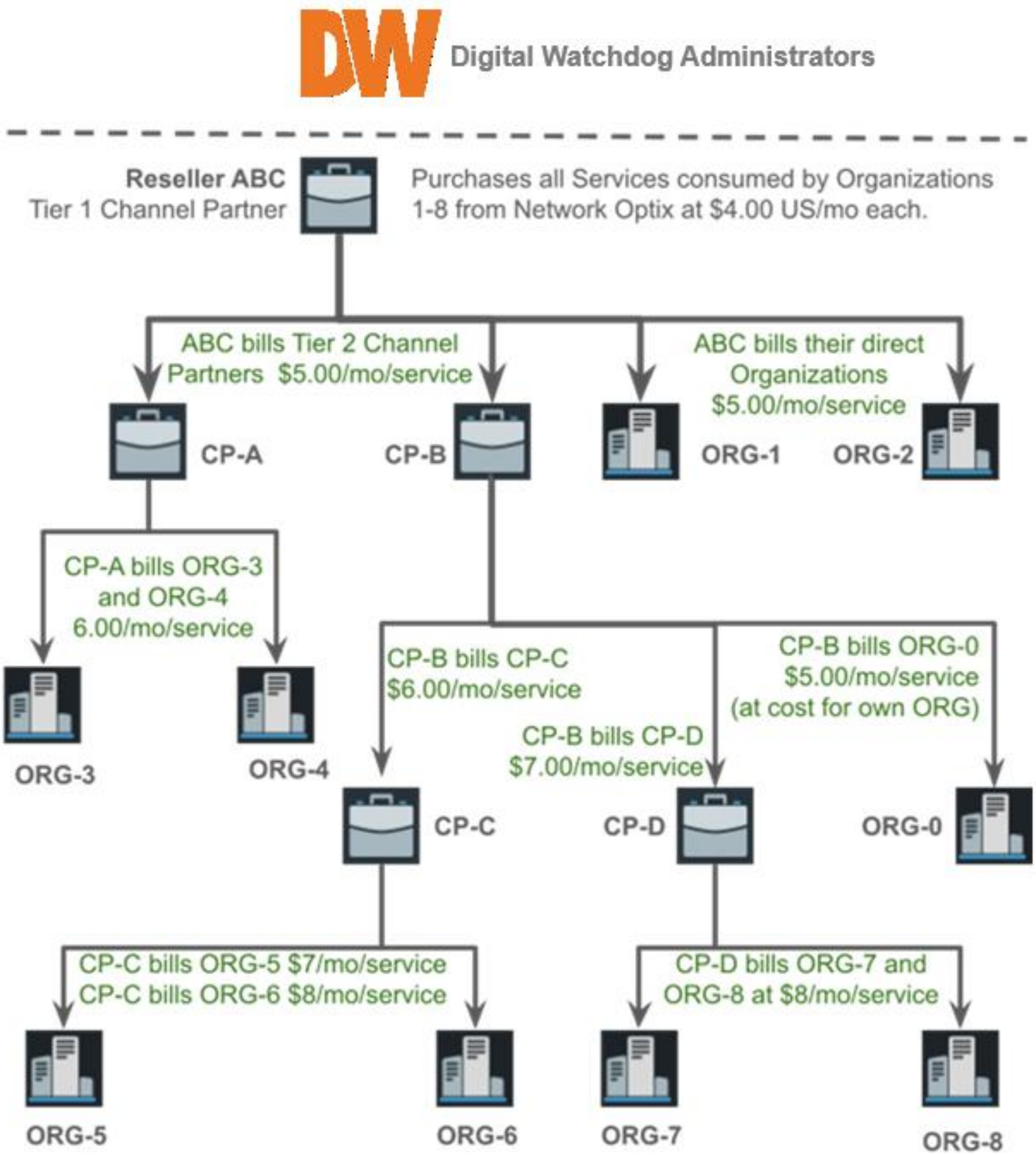
The Enterprise Edition replaces license keys with Subscription Services that quickly scale to meet the changing needs of Organizations. Subscription Services are billed on a (prorated) monthly basis, and existing Professional keys are converted to Subscription Credits when upgrading to the Enterprise Edition.

Terms and Acronyms

Term	Definition or Functional Description
Channel Partner and Sub-Channel Partner	Channel Partners are members of a distribution chain (resellers and installers) who allocate and bill Organizations for Subscription Services.
Channel Partner Team Member	Users who access the DW Connect Portal to manage Organizations, sub-Channel Partners, and define the available Subscription Services.
Subscription Services	A function or feature that is billed on a month-to-month basis.
Organization	A virtual container of Sites that share data and configuration settings. Organizations are allocated and consume Subscription Services
Organization User	Cloud users that are managed by the Organization Administrator.
Site (System)	Starting with Generation 6 VMS, the term Site replaces System as the term for representing multiple Servers acting as a single entity.
Cloud User Account	A Cloud account is an online set of credentials used to grant access to Organizations, Cloud-Connect Sites, and the DW Connect portal.
Local User Account	Accounts created within Sites (Services) that can only access resources over local networks and cannot access the DW Connect portal.
DW Connect Portal	An online tool where Team Members of a Channel Partner manage the settings for their sub-Channel Partners and Organizations.
Cloud Portal	An online tool where Organization Administrators and authorized Cloud Users manage Sites (Systems) and interact with resources and data.

Billing Model for Services

The following diagram illustrates example of how the billing model for Subscription Services might be deployed across an Organization.



Team Member Roles

The DW Connect Portal currently has one functional role (Administrator) with plans to incorporate at least two additional roles for Channel Partner Team Members.

User Role	Permitted actions
Administrator	• Create sub-Channel Partners and Organizations within own Channel Partner • Add, edit, and remove Team Members from the Channel Partner. • Modify the Company and Contact Information for sub-Channel Partners. • View revenue and profit charts for subchannel partners and direct organizations. • Manage the services available to sub-Channel Partners and direct Organizations. • View Service and Subscription prices set by the parent Channel Partner. • View usage statements and change reports.
Manager (pending)	PROPOSED: • View revenue and profit charts for subchannel partners and report direct organizations. • Manage the services that are available to directly managed Organizations. • View Service and Subscription prices set by the parent Channel Partner. • View usage statements and change reports.
Accountant (pending)	PROPOSED: • View usage statements and change reports.

NOTE: The pending role descriptions are provided with high confidence and are subject to change.

Operational Status

The Operational Status is applied to all sub-Channel Partners and Organizations reporting to the entity and serves as a method to toggle user access and prevent additional charges by halting Subscription Services.

Organizations and sub-Channel Partners can be adversely affected when their Channel Partner is moved to a Suspended or Shutdown state.

State or Status	Functional Description
Active	● The normal Operational Status is Active. ● Authorized users can access Sites over the cloud and local networks. ● Recording Services are running as configured, and usage is logged.
Suspended	● Recording Services are running as configured, and usage is logged. ● Sites are only accessible by local users over local networks.
Shutdown	● All recording services are stopped. ● Sites are only accessible by local users over local networks.

User Interface

The DW Connect interface contains dynamic elements and displays information based on the role and permissions of the currently signed-in user. This guide shows navigation menus, controls, and dialog boxes that may not be available to all Team Members while using the DW Connect Portal.

There are four functional areas of the DW Connect interface.

1. A persistent header that includes a search function and user profile controls.
2. A collapsible left panel with tabs that select the type of content shown in the central panel.
3. The central panel displays and provides ways to edit or interact with selected content.
4. Certain dialogs will be presented as an overlay covering the majority of the DW Connect interface.

Header Menu

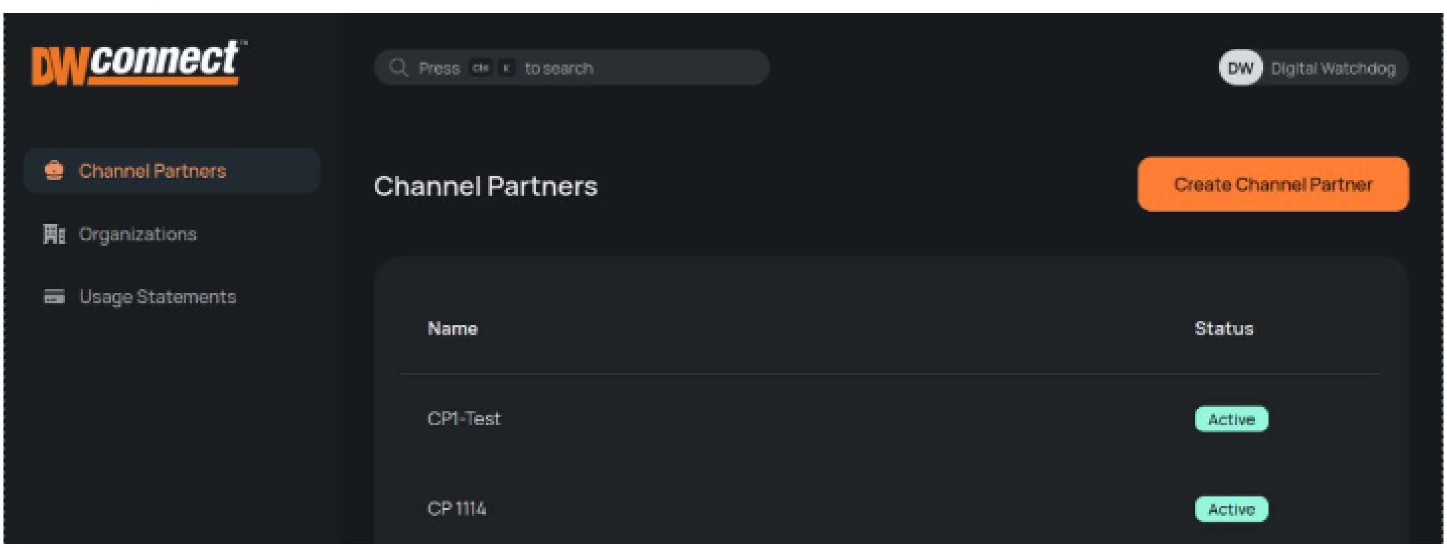
Along the top of the DW Connect interface are the following controls, listed from left to right:

- A product logo that returns users to the landing page for the active account.
- A search function to find Partners, Organizations, and Usage Statements within the active account.
- A user profile widget that opens to display additional controls (switch accounts, support, etc.)

Channel Partner Tab

Select the Channel Partner tab on the left panel to display all Partners that report to the active account.

Click on the name of Channel Partner to open a summary and dashboard and display additional options.

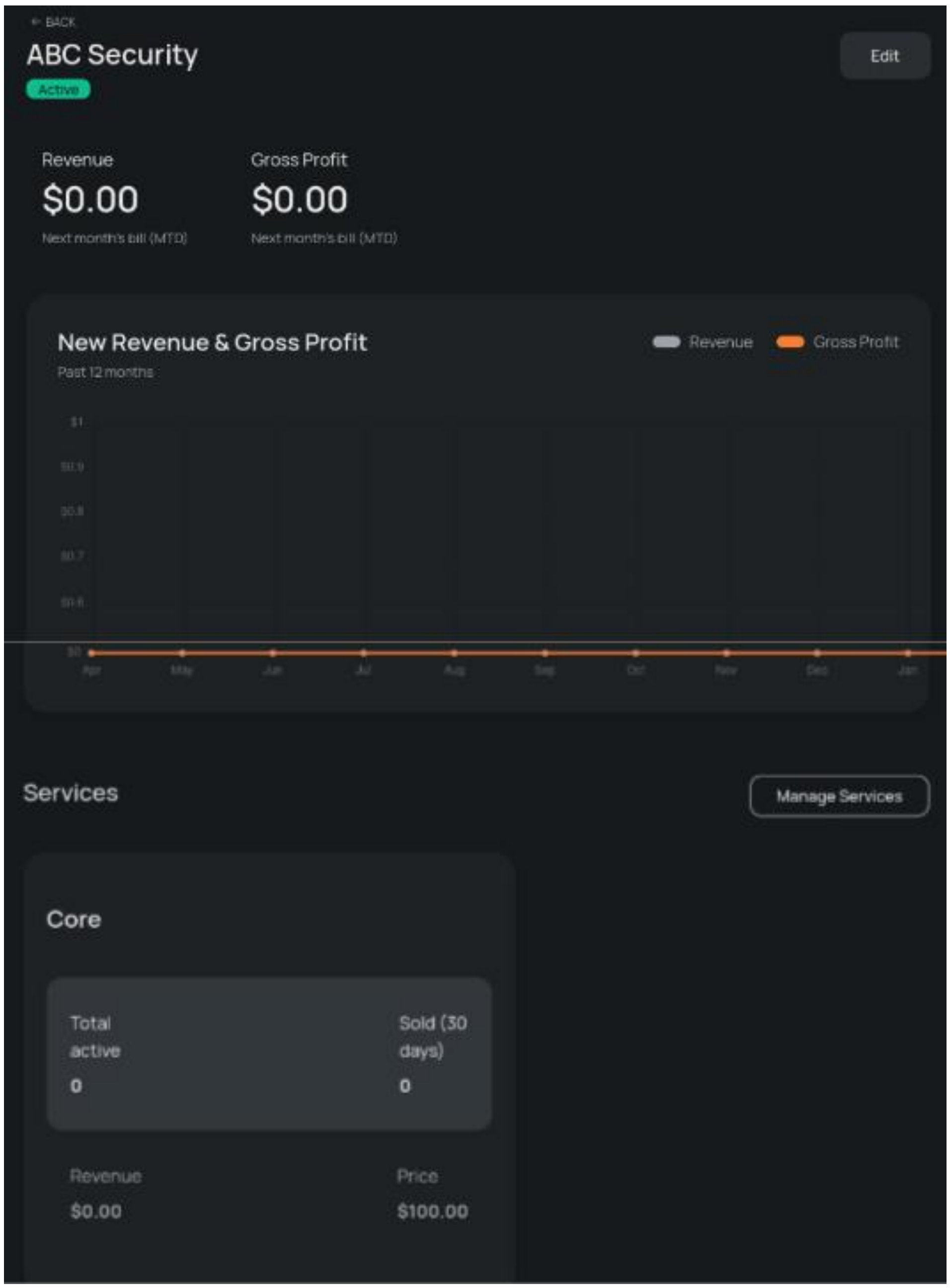


Organizations Tab

Select the Organizations tab on the left panel to display all Organizations that report to the active account.

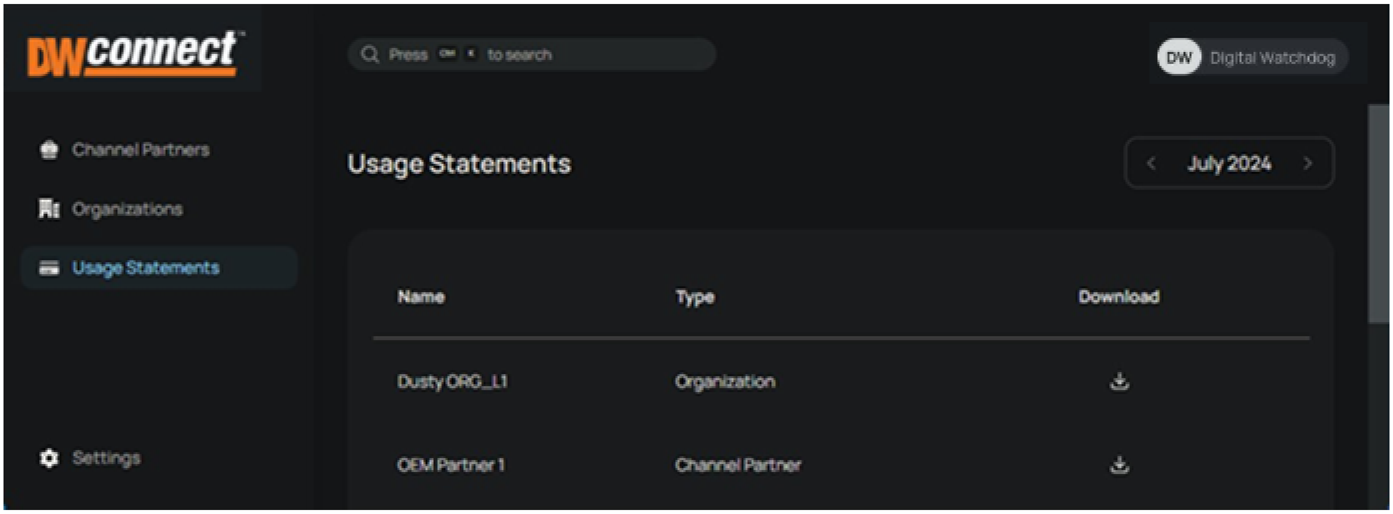
Click on the name of an Organization to open a summary and dashboard and display additional options.

Scroll down the page to view a rolling 12-month revenue and profit chart, a summary of services, a ledger of service change transactions, and available contact information.

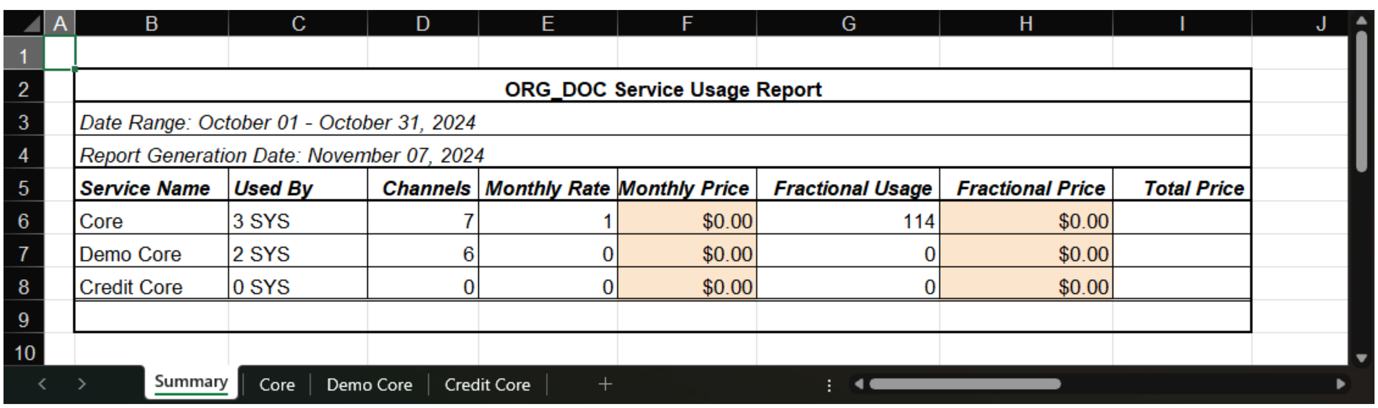


Usage Statement Tab

Select a named entity to view a usage report within the DW Connect portal.



Click the download icon to select either .CSV or .XLSX format and begin the local file download.



ORG_DOC Service Usage Report

Date Range: October 01 - October 31, 2024

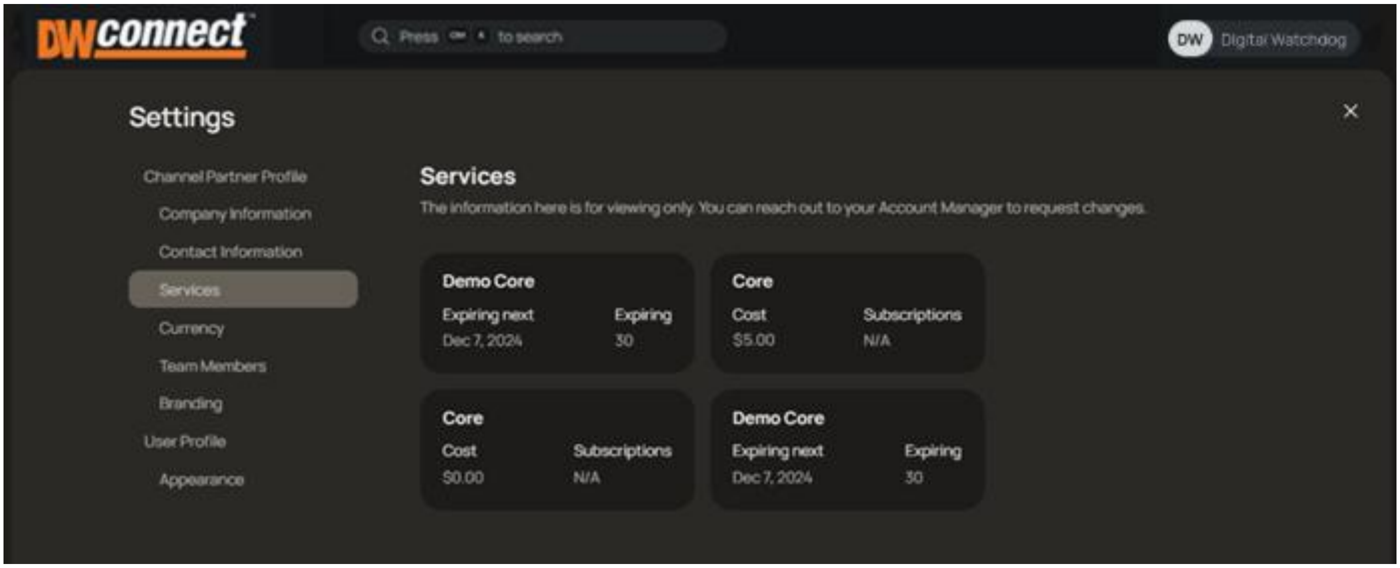
Report Generation Date: November 07, 2024

Service Name	Used By	Channels	Monthly Rate	Monthly Price	Fractional Usage	Fractional Price	Total Price
Core	3 SYS	7	1	$0.00	114	$0.00	
Demo Core	2 SYS	6	0	$0.00	0	$0.00	
Credit Core	0 SYS	0	0	$0.00	0	$0.00	

Summary | Core | Demo Core | Credit Core

Settings Menu

Click the Settings icon at the bottom of the left panel or find the Settings icon within the user profile popup to modify team members, view service costs, or update Company and Contact information.



See these related topics for additional information about available settings.

Channel Partner Profile

- Company/Contact Information
- Services
- Currency
- Team Members
- Branding

User Profile

- Appearance
- Language

Login to DW Connect

Open the DW Connect Portal and sign in using your DW Cloud credentials, or Create a DW Cloud Account and have the Channel Partner administrator add the new account as a Channel Partner Team Member.

https://dwconnect.digital-watchdog.com

Create a DW Cloud Account

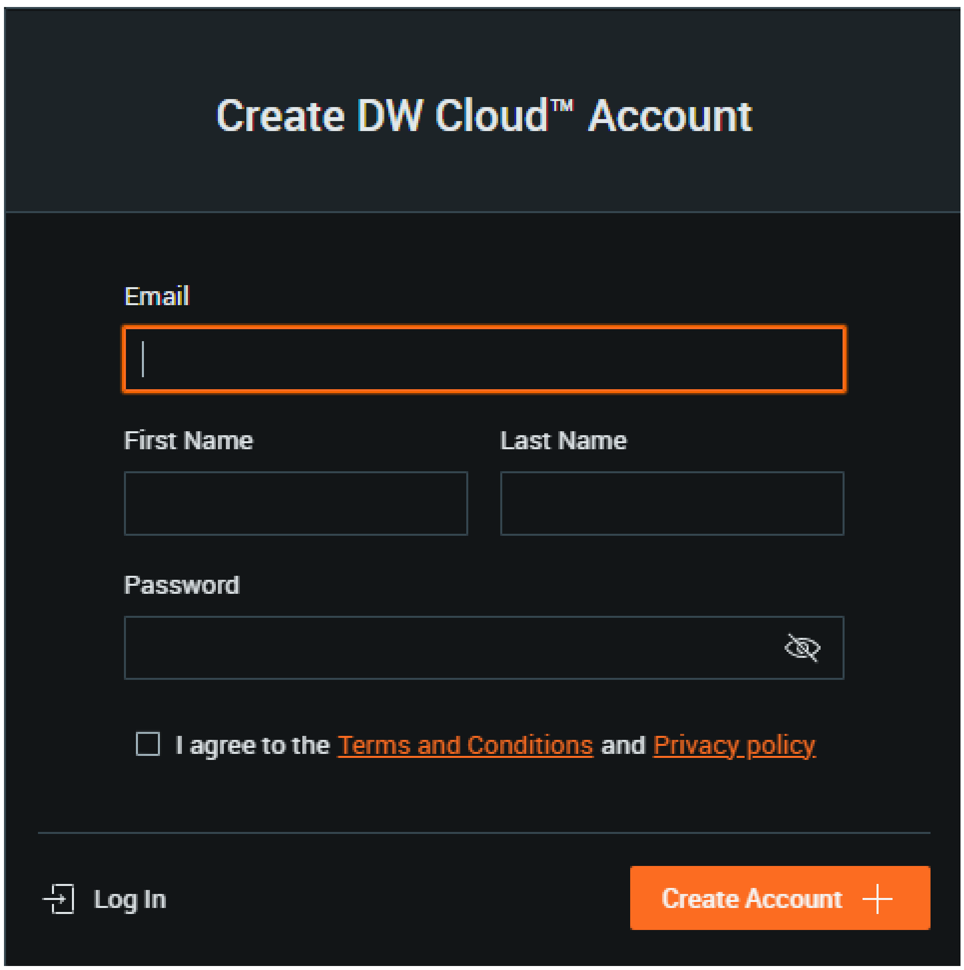
An DW Cloud account is a single-user credential that provides access to multiple cloud-connected products and services using various client devices. Accounts are free and fully activated upon email confirmation.

1. Click the Sign-Up link on the DW Connect landing page or the DW Cloud homepage.

2. Enter your email address and other required information; review the terms and privacy policy.

3. Follow the instructions found in the system-generated email to complete your account setup.

NOTE: Users added to cloud products before creating a cloud account will receive an invitational email.

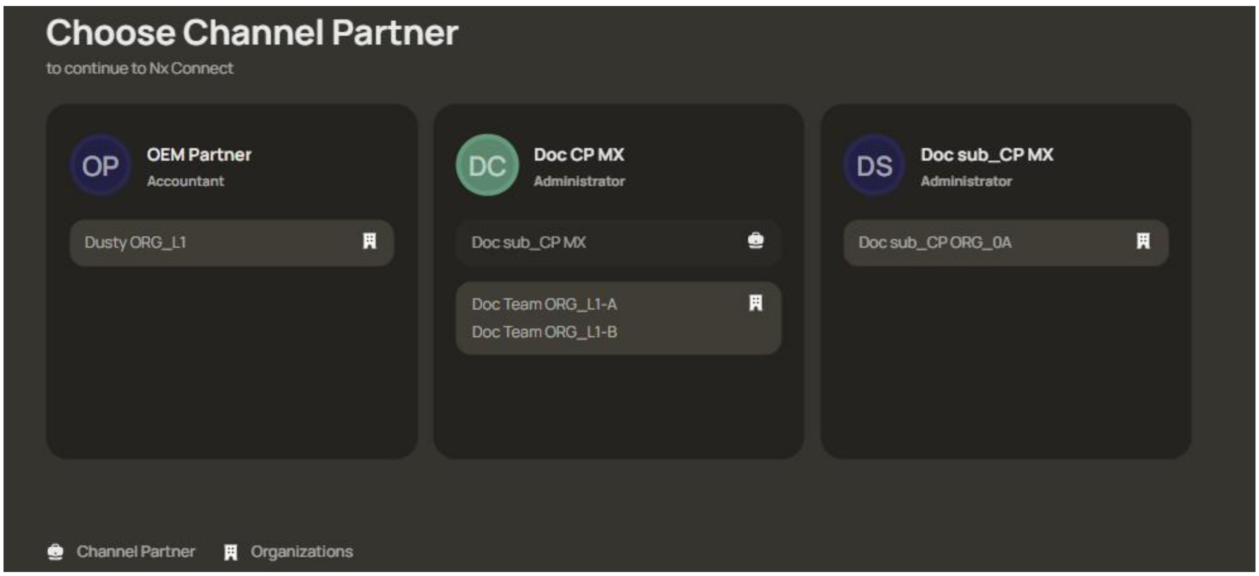


Select Channel Partner Account

The information in this section only applies to users who manage multiple Channel Partners, as users who manage only a single account will not be shown the option to select or change accounts.

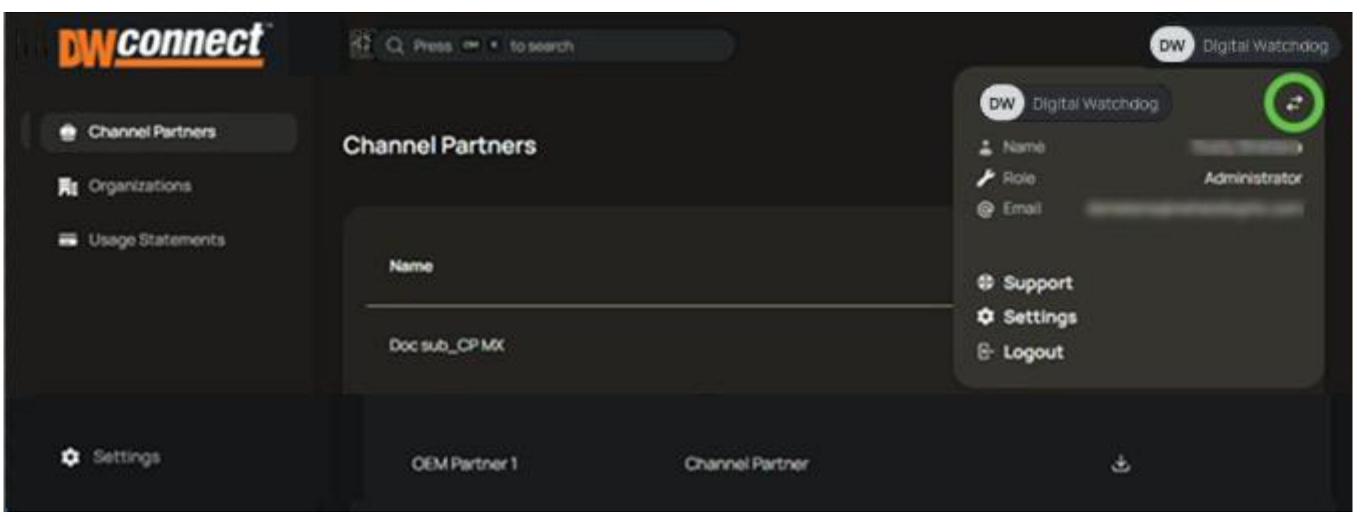
After successfully signing into DW Connect, the landing page displays all the Channel Partner accounts the current user can access. Sub Channel Partner and Organization names are also displayed on each card.

Click on a Channel Partner card to open an account.



Change Active Channel Partner Account

To switch active accounts, click on your user profile in the upper right-hand corner and select the switching arrows(← →) to display the Channel Partner selection dialog.



Managing sub-Channel Partners

Creating a sub-Channel Partner enables separate Organizations, Sites (Systems), and users to be managed by a delegate team while still falling under the originating Channel Partner authority.

Creating a sub-Channel Partner

1. Log into DW Connect as an account Administrator and select the account to manage.
2. Select the **Channel Partners** tab on the left side menu.
3. Click the **Create Channel Partner** button.
4. Provide all information required by the **Create Channel Partner** dialog.
5. Click the **Next** button.
6. Enter contact Information:
    - One Account Manager (the main contact for this parent Channel Partner).
    - One Administrator (the main contact for the created sub-Channel Partner).
    - One Accountant - optional.
7. Click the **Next** button.
8. Select the Services that will be available to the sub-Channel Partner, set the Service price, and click the **Add Service** button below the pricing information.
9. Optionally populate the Custom field with a customer management system or other reference.
10. Click the **Next** button.

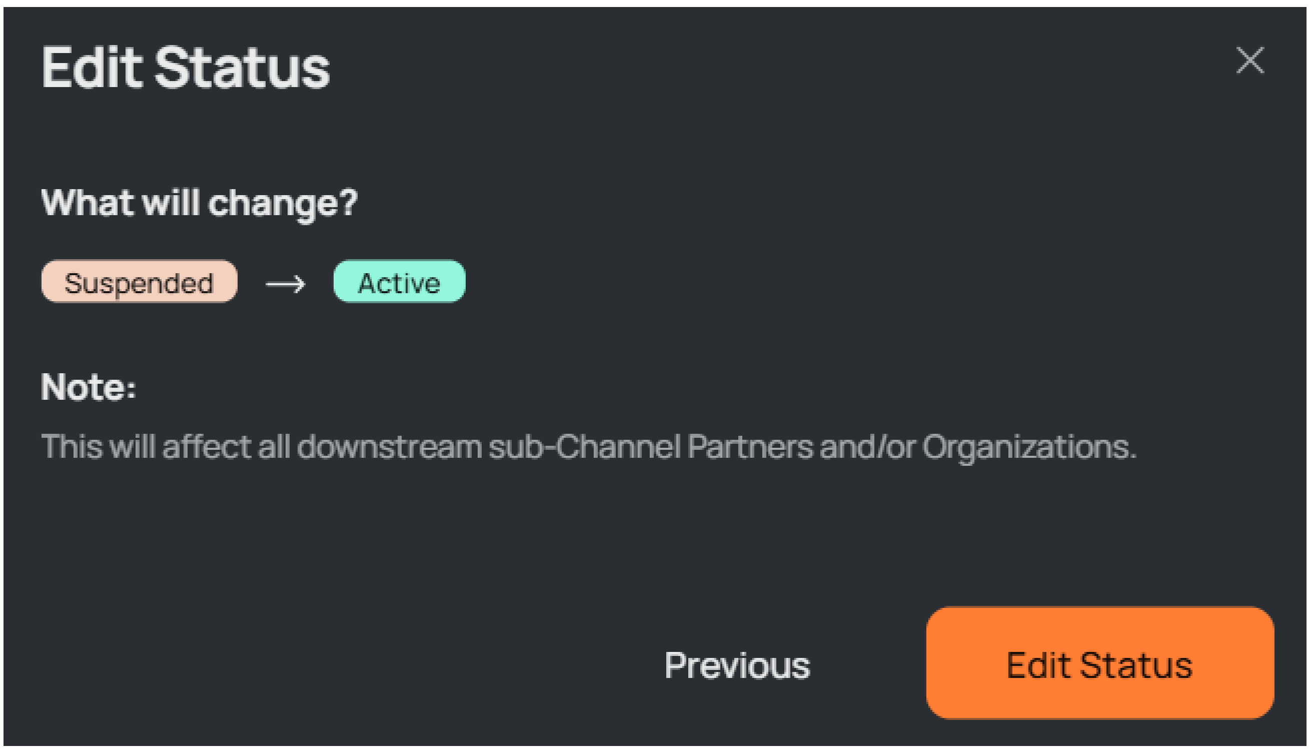
Deleting a sub-Channel Partner:

It is impossible to delete a sub-Channel Partner – set the operational state of inactive Channel Partners to Shutdown, as this will prevent services from being consumed by the inactive Channel Partner.

Changing the Status of a sub-Channel Partner

Review the [descriptions of the available States]() before taking this action. State changes apply to all sub-Channel Partners, Organizations, and Sites within the Channel Partner where the status changes.

1. Log into DW Connect as an Administrator and select the account to manage.
2. Use the global search function or browse the **Channel Partners** tab on the left menu.
3. Select the **Channel Partner** to modify from the search results or the table displayed.
4. Click the **Edit** button in the upper right-hand corner to open a sub-menu and select **Status**.
5. Select the intended Status and click the **Next** button.
6. Confirm the Status change by clicking the **Edit Status** confirmation button.



NOTE: Status changes are nearly instantaneous and will be applied to all downstream sub-Channel Partners and Organizations, which can limit Cloud users' access to Sites or halt recording Services. Currently connected users will be disconnected from affected systems.

Managing Team Members (Channel Partner Profile)

Adding Team Members:

1. Log into DW Connect as an Administrator and select an account to manage.
2. Click on the **Settings** gear icon at the bottom of the left panel menu to open the Settings dialog.
3. Select **Team Members** on the left side menu of the Settings dialog.
4. Click the **Add New Team Member** button above the list of existing users.
5. Provide the email address of the new user and select their role.
6. Click the **Save** button to finish adding the user.

NOTE: Users without an existing DW Cloud account will receive an email inviting them to create an account.

Editing Team Members:

1. Log into DW Connect as an Administrator and select the account to manage.
2. Click on the **Settings** gear icon at the bottom of the left panel menu to open the Settings dialog.
3. Select **Team Members** on the left side menu of the Settings dialog.
4. In the table of Team Members, open the 3-dot menu to the right side of the **Name** field.
5. Select **Edit Team Member** from the 3-dot pop-up menu.
6. Make the intended changes to the Team Member account and click **Save**.

Deleting a Team Member:

1. Log into DW Connect as an Administrator and select the account to manage.
2. Click on the **Settings** gear icon at the bottom of the left panel menu to open the Settings dialog.
3. Select **Team Members** on the left side menu of the Settings dialog.
4. In the table of Team Members, open the 3-dot menu to the right side of the **Name** field.
5. Click on the **Delete Team Member** text at the bottom of the User attributes window.
6. Click the **Delete Team Member** button in the confirmation dialog; this cannot be undone.

Company and Contact Information (Channel Partner Profile)

Maintain contact information, physical addresses, and website for the Channel Partner.

1. Log into DW Connect as an Administrator and select the account to manage.
2. Click on the **Settings** gear icon at the bottom of the left panel menu to open the Settings dialog.
3. Select **Company Information** on the left-side of the settings menu to open the edit dialog.
4. Select **Contact Information** on the left side-side of the settings menu to open the edit dialog.

Branding (Channel Partner Profile)

1. Log into DW Connect as an Administrator and select the account to manage.
2. Navigate to the Channel Partner to configure.
3. Click on the **Settings** gear icon at the bottom of the left-side menu to open the Settings dialog.
4. Select **Branding** on the left side menu.
5. Choose the color pattern that will be applied to the Channel Partner profile placeholder.
6. The color pattern is immediately applied without the need to save or confirm changes.

NOTE: The feature is under development. Currently, only the Channel Partner 'profile color' can be set.

Interface Appearance (User Profile)

The interface defaults to the dark mode with the option to select light mode or the system settings.

1. Log into DW Connect.
2. Find the **Settings** gear icon at the bottom left-side menu or within the user profile details.
3. Select **Appearance** on the left side menu**.**
4. Choose the interface theme (system, dark, light)
5. The theme is immediately applied without the need to save changes.

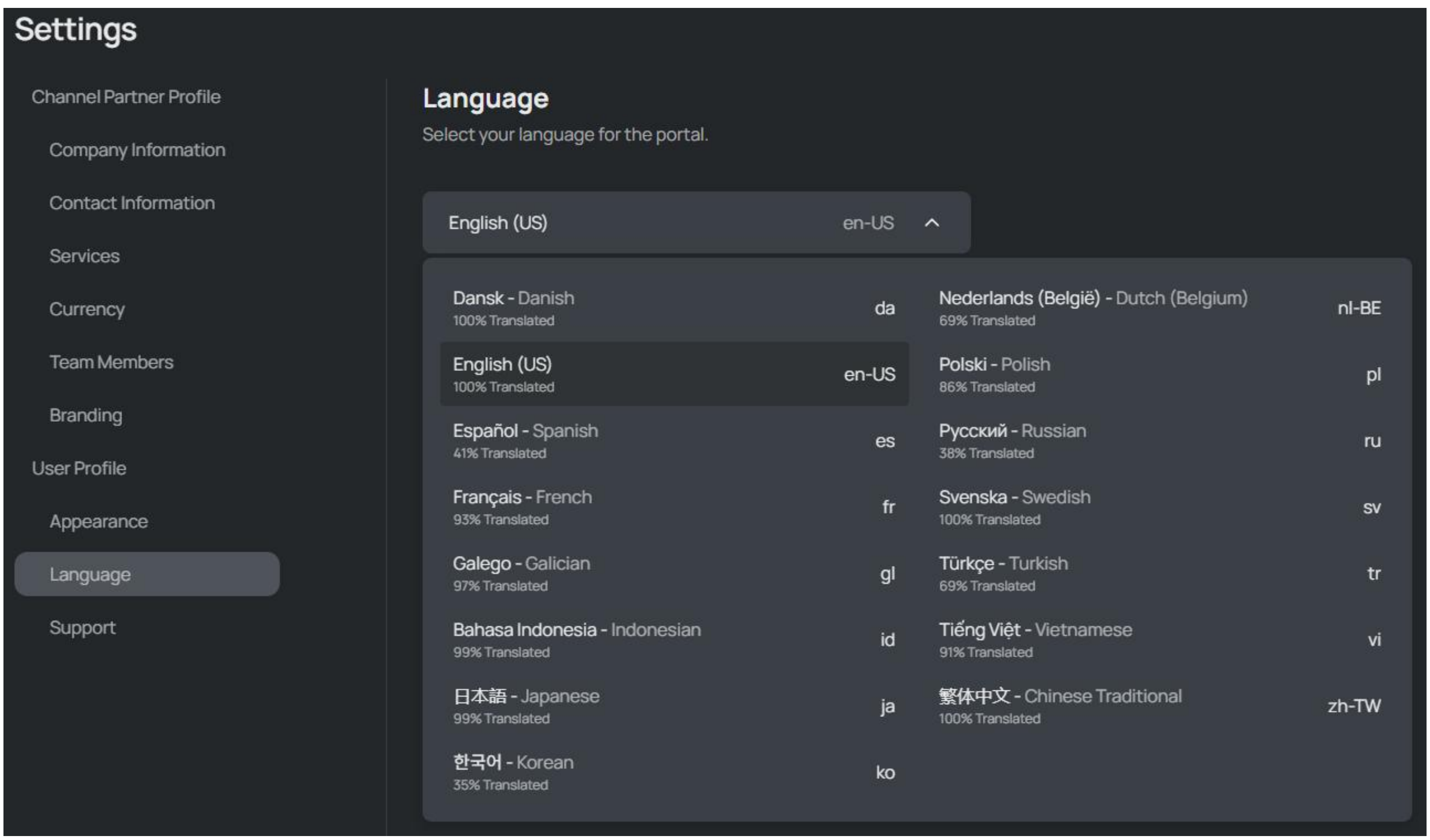
Interface Language (User Profile)

The interface defaults to English (US) with the option to select from a list of available languages. Changing the language setting will update menus, dialog screens, and the formatting of numbers and dates.

Language settings changes are saved to the users' profile and applied at future logins to DW Connect.

NOTE: Not all available language translations are 100% complete. The approximate percentage of content translated is listed below the language. Additional languages will continue to be added.

1. Log into DW Connect.
2. Find the **Settings** gear icon at the bottom left-side menu or within the user profile details.
3. Click on **Language** to open the language selection dialog.
4. Click the expansion control next to the current language to open the selection menu.
5. Select the desired language to see the changes immediately applied.
6. Close the language selection dialog as language changes are automatically saved when applied.



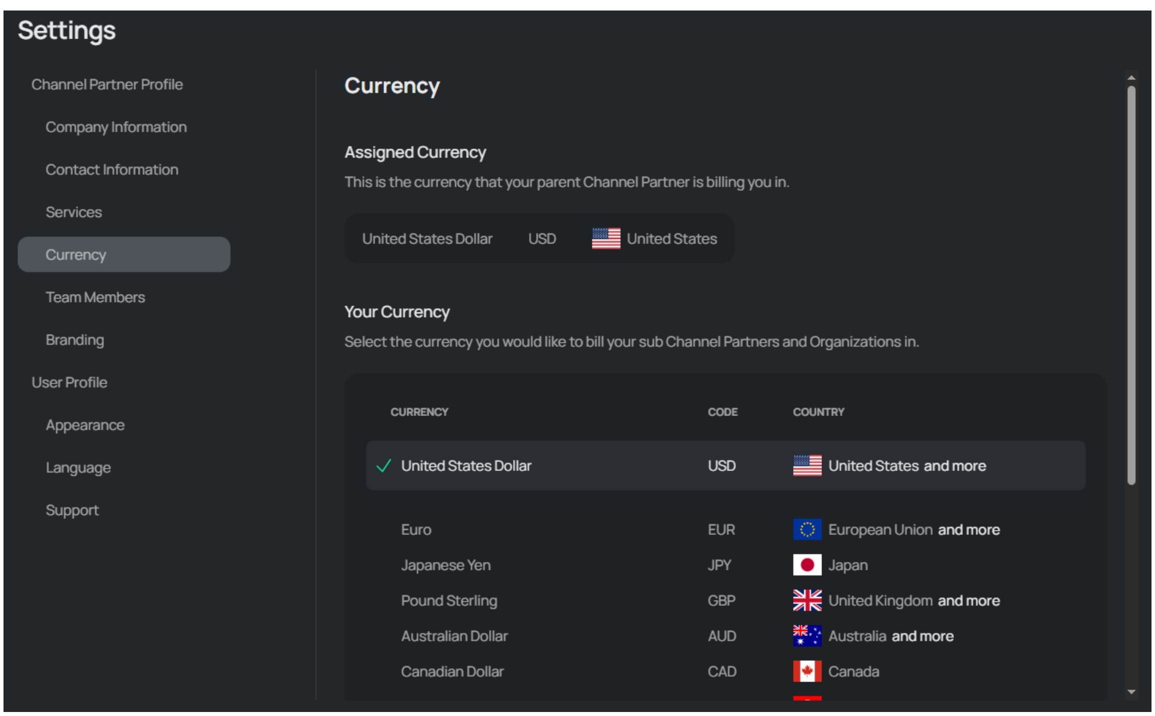
Currency Options

There are two currency settings within the DW Connect Portal: assigned currency and your currency.

- Assigned Currency:
  - The currency between the active account and the Channel Partner providing services.
  - Only the Channel Partner providing Services can change the Assigned currency and costs.
- Your Currency:
  - The currency between the active account and sub-Channel Partners and Organizations.
  - When Your Account provides (resells) Services, you define the currency and Service cost.

Changing Your Currency

1. Log into DW Connect as an Administrator and select the account to manage.
2. Click on the **Settings** gear icon at the bottom of the left-side menu to open the Settings dialog.
3. Select **Currency** on the left side menu – select the desired currency in the **Your Currency** list**.**
4. Confirm the currency change within the dialog pop-up box.
5. Review and update every Service price your account has set. Exchange rates are not applied when the currency is changed and this can create significant discrepancies after a currency change.



Managing Organizations

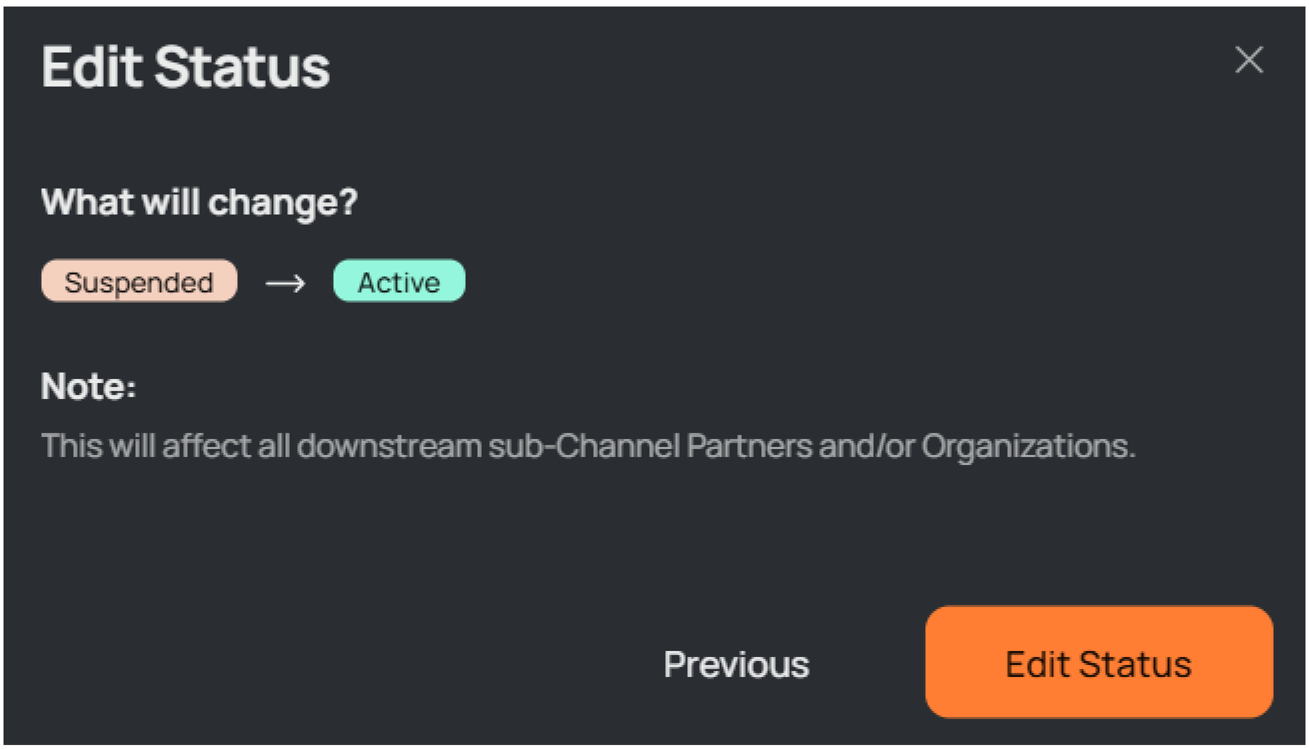
Creating an Organization

1. Log into DW Connect as an Administrator.
2. Select the **Organizations** tab on the left side menu.
3. Click the **Create Organization** button.
4. Enter a Company Name for the Organization
5. Provide the physical address and (optional) website.
6. Click the **Next** button…
7. Enter Contact Information consisting of:
    a. One Account Manager email (main contact from the parent Channel Partner).
    b. One Administrator's email (main contact for the parent Channel Partner).
    c. One Accountant email (optional).
8. Click the **Next** button.
9. Select the Services that will be available to the Organization and set the price.
10. Click the **Next** button.
11. Optionally populate the Custom field with a customer management system ID, link, or reference.
12. Click **Create** to finish creating the Organization.

Changing the Status of an Organization

Please review the descriptions of Status conditions before taking this action, as Status changes apply to all Sites, Servers, and Cloud users downstream of where a status change is made.

1. Log into DW Connect as an Administrator.
2. Use the global search function or browse the **Channel Partners** tab on the left menu.
3. Select the **Channel Partner** to modify from the search results or the table displayed.
4. Click the Edit button in the upper right-hand corner to open a sub-menu and then select **Status**.
5. Select the intended Status and click the **Next** button to advance the dialog.
6. Confirm the Status change by clicking the **Edit Status** confirmation button.



NOTE: When an Organization is not active, Cloud Users cannot log in and Services may be paused.

Deleting an Organization

It is impossible to delete an Organization. Set the operational Status of inactive Organizations to Shutdown to prevent Subscription Services from being used and/or incurring additional costs to the entity.

Managing Services

The Services available to Channel Partners and Organizations are first defined when creating sub-Channel Partners and Organizations – unlimited revisions by authorized Team Members are possible at any time.

Overview of Services

- The providing Channel Partner sets the types of Subscription Services available to sub-Channel Partners and all Organizations and can vary between branches of the same sub-Channel Partner.
- The Channel Partners set the number of Subscription Services available to an Organization, and Organizations are invoiced for all available Subscription Services, including those not installed.
- Changes to Subscription Services are pro-rated (daily) when changed between billing cycles.
- All Services allocated to a sub-Channel Partner and their Organizations will be revoked if the providing Channel Partner changes the Operational Status of an entity to be Shutdown.
- Service Subscriptions can incur a net loss when set below the resellers' purchase price.

Service Types Available

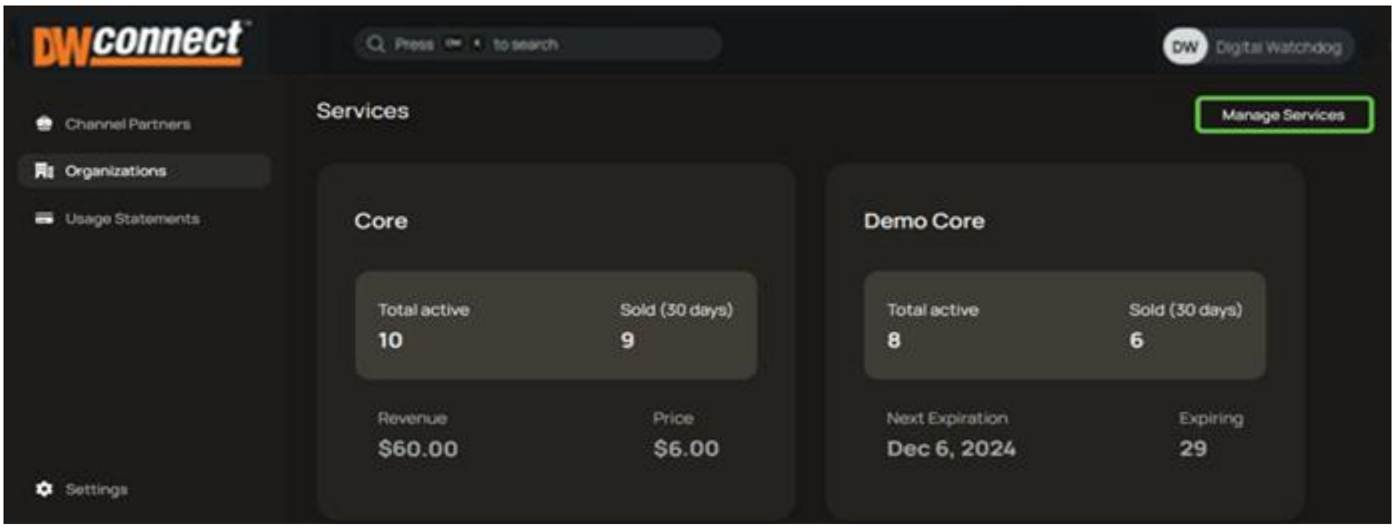
The initial Subscription Services replicate the core features licensed by the Professional Edition VMS within an adaptive framework designed to support a growing catalog of Service types to be added over time.

Service Name	Functional Description
Core	● Enables continuous live streaming, recording, and device management. ● Includes all Professional and Enterprise Edition features (Cloud, Video Wall). ● One Core Service is required per video acquisition device.
Demo Core	● Provides a one-month free trial of all Core Service features. ● The Demonstration period starts upon activation and continues for 1 month.
Credit Core (pending)	● A duration of time for which an account is credited with access to all Core Services. ● Only available when transitioning a Professional Site (System) to the Enterprise Edition. ● Credit Core Services convert to a billed Core Services plan at the end of credit duration.

Adding Additional Services

The Manage Services dialog is where additional Services are added to a sub-Channel Partner branch or an Organization. The dialog context and changes are relative to the location where the dialog is opened.

1. Log into DW Connect as an Administrator.
2. Use the global search function or browse the **Channel Partners** and **Organizations** tabs on the left panel menu to locate the **Channel Partner** or the **Organization** to modify.
3. Scroll down to find the Services section and click the **Manage Services** button.



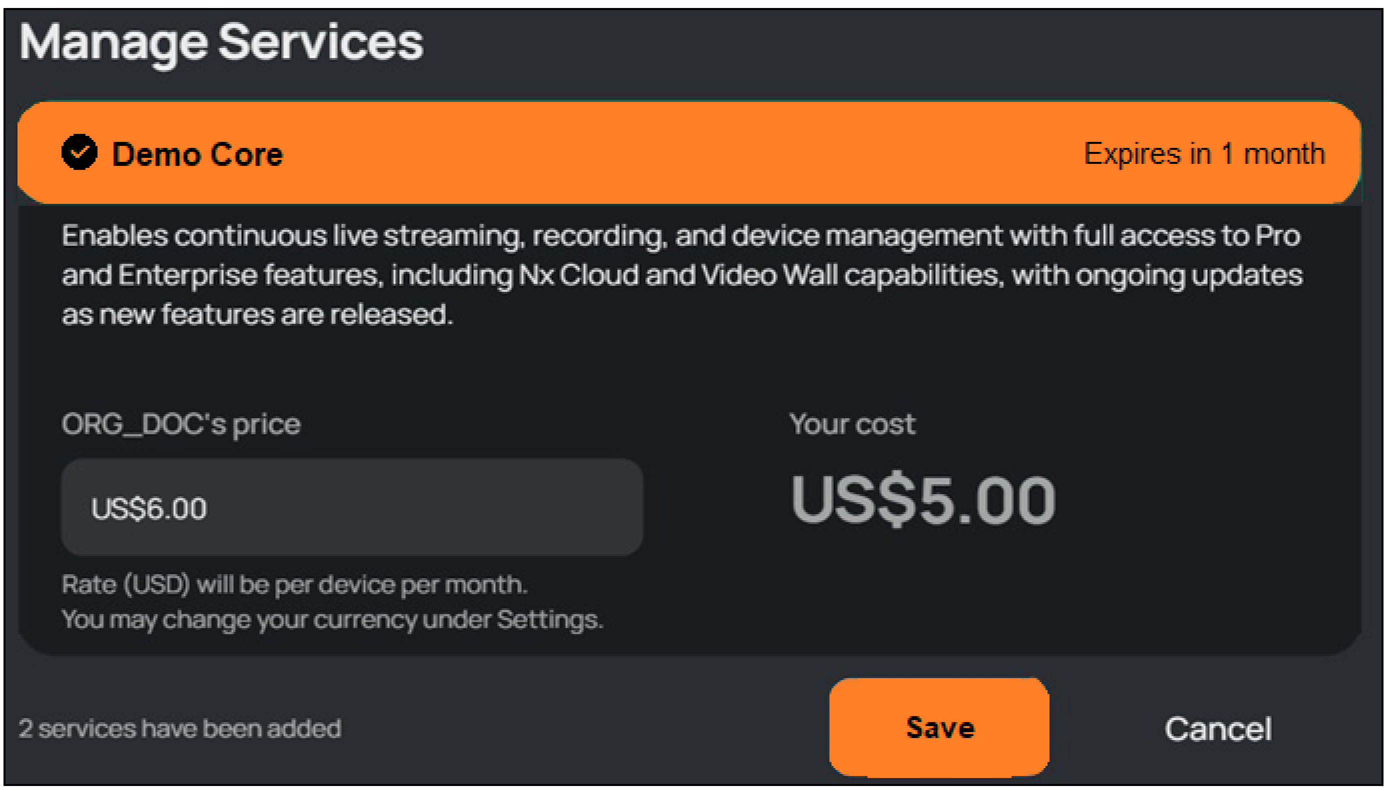
4. Click on the title of any Service to expand the description and current pricing model.
   a. Activated Services have a highlighted title and a checkmark next to the Service name and . Services available for activation are displayed without a highlighted title nor the checkmark.
5. Core Services must have a price set before the **Add Service** button will be enabled, demo services are free and added by clicking the Add Service button. Click the **Save** button to commit changes.

Changing Service Prices

A reseller generates profit when selling Service Subscriptions above the price they pay the providing Channel Partner for the same Service. Prices are waterfalled through the Billing Model for Services and can only be changed by the account providing the Service to sub-Channel Partners or Organizations.

The price of Subscription Services is set using the Manage Services dialog, which is also used to Add Additional Services to a channel partner.

1. Log into DW Connect as an Administrator.
2. Use the global search function or browse the **Channel Partners** and the **Organizations** tab on the left panel menu to locate and select the **Channel Partner** or the **Organization** to modify.
3. Scroll down to find the Services section and click the **Manage Services** button.
4. Click on the title of any Service to expand the description and current pricing model.
5. The expanded Services description includes Your Cost and the price charged for a service.
6. Change the price charged to the next Tier and click the **Save** button to commit the change.
7. The last price change according to the change date will be applied to the entire billing cycle.

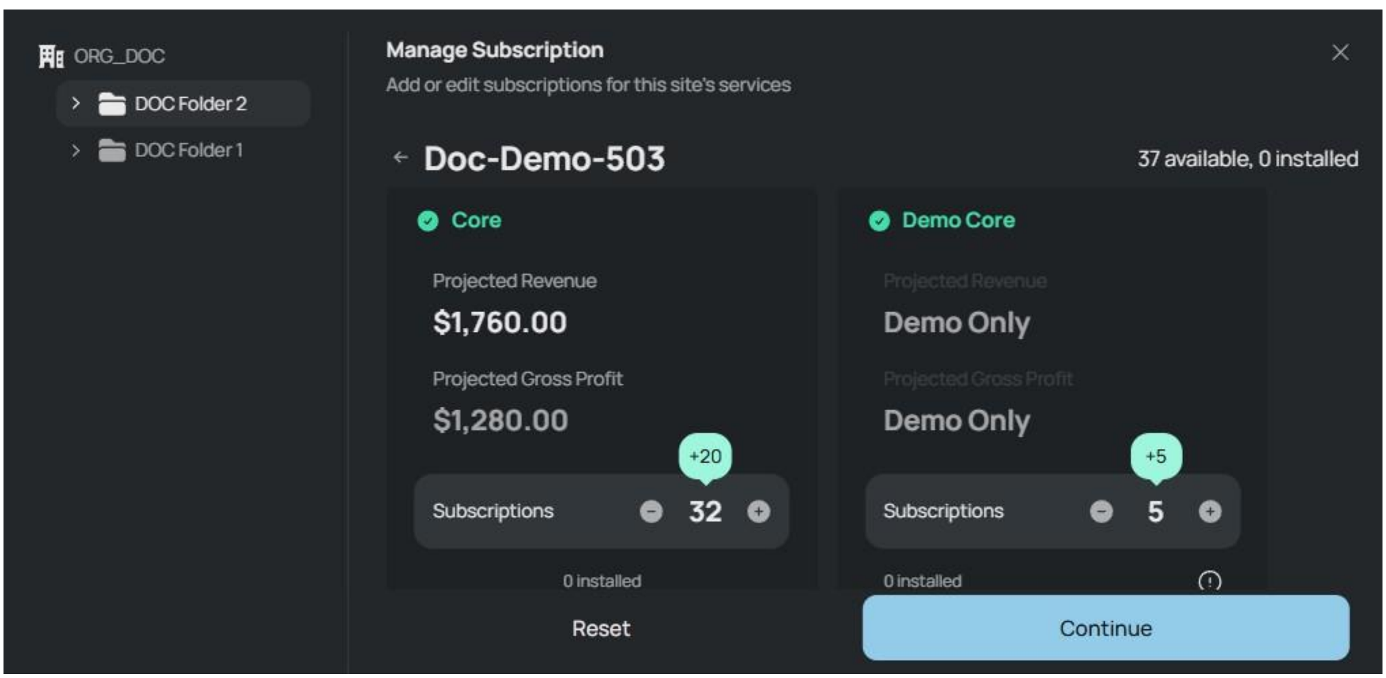


Set the Number of Services Available

One Core Service is required for each device that will acquire or stream video. Service usage is invoiced at the number of available Service Subscriptions, including those not installed or active.

NOTE: This guide only covers changing the number of available services within the DW Connect Portal.

1. Log into DW Connect as an Administrator or Manager and select the account to manage.
2. Use the global search function or browse the **Organizations** tab on the left panel menu.
3. Select the **Organization** to modify from the search results or the table displayed.
4. Click the **Manage All Sites** button to open a Site navigation control.
5. Locate and click the tile containing the Site where the number of Services will be revised.
6. In the Subscriptions box, use the (+) and (-) buttons to change the number of Subscriptions, or click on the number of Subscriptions and type in the new number of Subscriptions that will be available.
7. Clicking **Continue** will generate a change summary and display a **Confirm Change** button.



Reports and Transaction History

Summary reports of Service usage and changes are viewable within the DW Connect Portal, and detailed reports in .CSV and .XSLX formats can be generated and downloaded for offline analysis.

Viewing Summary Reports in DW Connect

1. Log into DW Connect as an Administrator (Manager and Accountant roles under development).
2. Select Channel Partner Account or Change Active Channel Partner Account.
3. Select the Usage Statements tab on the left side menu to open a table of available reports.
4. Choose a sub-Channel Partner or Organization to see the summary report in the portal.
5. Global search can also be used to locate usage statements for the past month.

NAME	MONTHLY USAGE	PRORATED USAGE	TOTAL SUBSCRIPTIONS AT THE END OF THE MONTH
ORG_DOC	1	38	3
DOC Folder 1	1	0	1
Folder 1A	0	0	0
Doc-Demo-39503	0	0	0
User Manual 6	1	0	1
DOC Folder 2	0	38	2

Download Detailed Reports

Follow these steps to download a comprehensive Service statement.

1. Log into DW Connect as an Administrator (Manager and Accountant roles under development).
2. Select Channel Partner Account or Change Active Channel Partner Account.
3. Select the Usage Statements tab on the left side menu.
4. Click on the download icon in the download column for the desired report.
5. Select the report format in the pop-up dialog after clicking the download icon.
6. The statement download will automatically begin after the statement is generated.