
Getting started for administrators

- Introduction for new administrators

CxPlanner

CxPlanner

Welcome!

Welcome to Cx Planner! We are happy for that you have joined Cx Planner. We are looking forward to having you as a user.

This guide will help you with logging in and getting started using the platform. If you have any questions for the usage or ideas for new features then don't hesitate to contact us at support@cxplanner.com.

Hvem er guiden lavet til

This guide is targeted at users in Cx Planner, which is created with the status "Moderator" or "Administrator". This means that you can create new projects and add & remove users to the platform.

You get this guide as a user has been created for you on the platform. If you have any questions for your user, please feel free to contact us at support@cxplanner.com.



Content

This guide gives a general introduction to Cx Planner. Before reading this guide, we advise you to read our guide "Cx Planner – Guide for users – Part 1".

If you are interested in more of Cx Planner's features, then dig into our guide "Part 2", where we are explaining some of the advance features and use cases.

Part 1 – Users

- 1) Company & Users
- 2) User administration
- 3) Add a user to a project

Part 1 – Projects

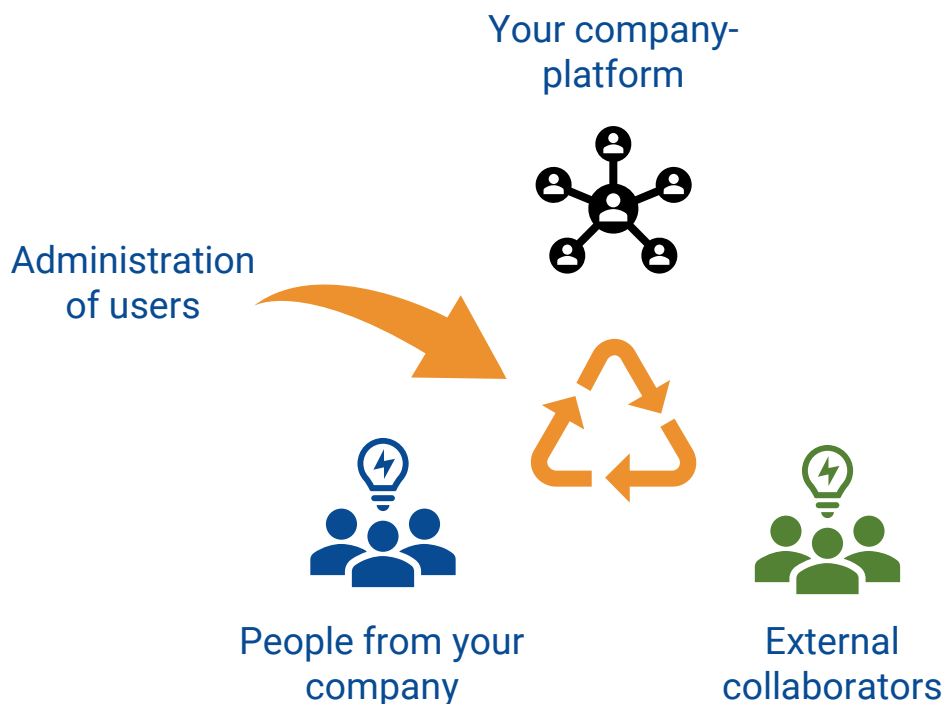
- 1) Create a new project
- 2) Adjust the project settings

Company & Users

You have now started using Cx Planner and need to add users to your projects. Before you can add users to your projects, the user must have access to your company platform.

The structure of the platform

In Cx Planner's user administration, you must add the people you want to have access to your company platform. It may be people within your company who should be allowed to create projects, and it may be external partners who should only participate in your projects.



The different user roles

When you add a new user, you will have 3 different user roles to choose from.

Role	Access rights
Administrator	The administrator can do everything.
Moderator	The moderator can create new projects and add new users to the platform.
User	The user cannot do anything on the platform until the user is added to a project.

Choose the user role

Administrator

By default, you should only create 1-3 **Administrators**. Persons with this status must be the company's superusers.

Moderator

Daily users, eg program managers, who must be able to create new projects and add and remove users must be created as **Moderators**.

Users

Ordinary users who only have to participate in projects and external partners must be created as **Users**.

User administration

When you create a new user, you only need to know three things: Name, Email, Company Name.

Once you have created the user, an email will be sent with a confirmation link and a password will be sent to the user.

Add new user

2) Click "Add user"

The image shows a composite screenshot of the CxPlanner user administration interface. It includes a sidebar menu, a main dashboard area, and a 'Users' management section. An 'Add user' button is highlighted in the 'Users' section. A modal window titled 'Add user' is open, showing the following fields:

- Name: Thomas TJ
- E-mail: ttj@cxplanner.com
- Company: From your company (with a checked checkbox for 'Check this if the person is from your company')
- Privileges: User
- Language: EN
- Timezone: GMT 2

An 'Add user' button is located at the bottom of the modal. Three orange arrows point to the 'Users' menu item, the 'Add user' button, and the modal form, corresponding to the numbered steps below.

1) Choose "Users"

3) Enter information and add new user

Add user to a project

Once you have added a user to your company platform, you can then add the user to your projects.

The different project roles

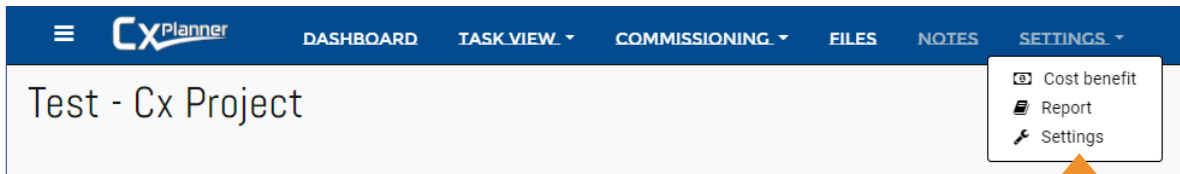
When you add a user to a project, you will have 6 different project roles to choose from.

Project role	Access rights
Administrator	The administrator can do everything on the project, including deleting the project.
Manager	The moderator can create new tasks and add new users to the project.
Consultant	The consultant can create and close tasks on the project.
Designer	The designer can answer questions and use the "designer modules" ^[1]
Contractor	The contractor can answer tasks and use the "contractor modules" ^[1]
Viewer	The viewer can not do anything on the project - only observe and see.

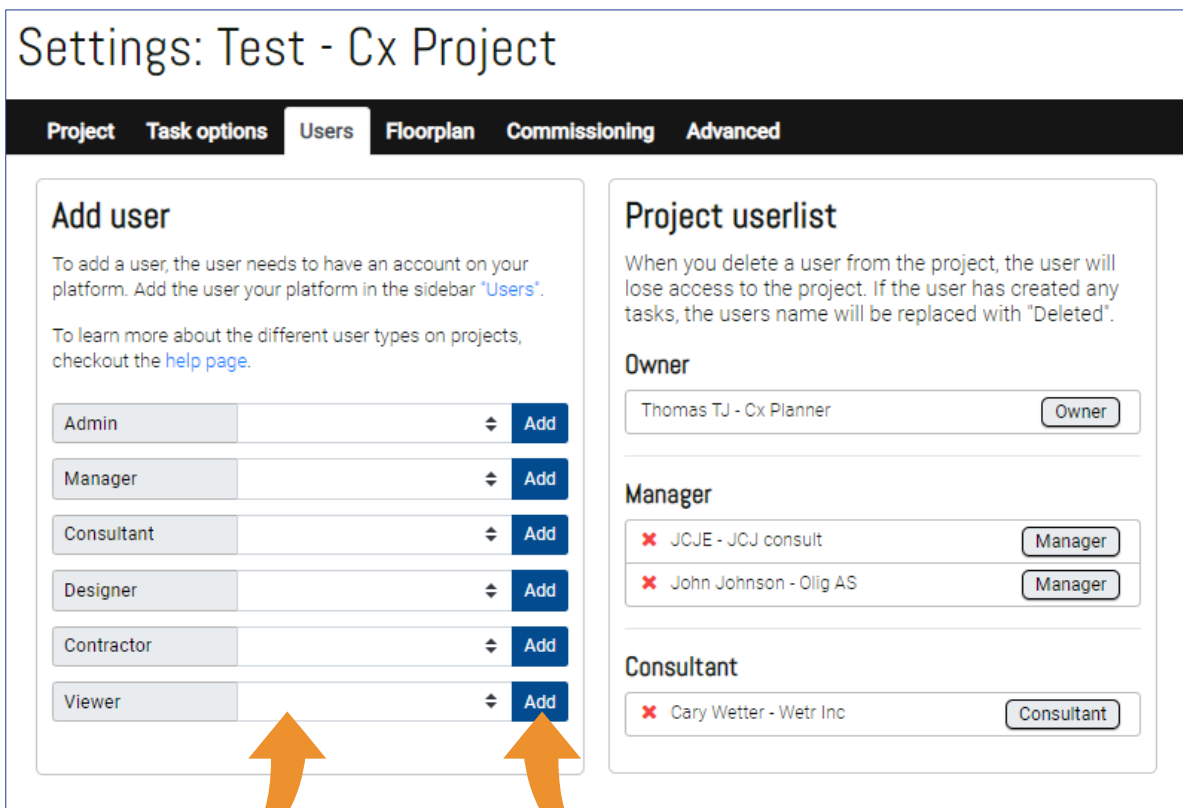
[1] Cx Planner offers various optional modules that can increase productivity. It includes e.g. 3D viewer, document review, and many more. Contact support@cxplanner.com for more information.

Add users to a project

To add new users to a project, open the project. Once you have opened the project, go to "Settings" and add the users.



1) Select "Settings" inside a project



2) Select the user from the dropdown list

3) Press "Add". The user will then have access to the project.

Create a new project

Users with the status "Moderator" and "Administrator" can create new projects. Only a project name is required to create a new project.

Add a new project

The screenshot shows the 'Add new project' form in the CxPlanner application. The form is divided into two main sections: 'Project details' and 'Task options'. The 'Project details' section includes fields for Name, Cx tools (Yes/No), Status (Open), Start date, End date, Handover, Cx authority, Language, Description, Customer, Project price, Cx price, Currency, Size (m2/feet), and Size unit. The 'Task options' section includes fields for Status, Swimlane, Phases, and Categories. The 'Status' field has a dropdown menu with options: Open, Active, and Closed. The 'Swimlane' field has a dropdown menu with options: Default. The 'Phases' field has a dropdown menu with options: [Enter] -> Save. The 'Categories' field has a dropdown menu with options: BMS, Electrical, Cooling, Heating, and Ventilation. The form has two buttons: 'Save new project' and 'Clone project'. The 'Save new project' button is highlighted with an orange arrow pointing to it from a callout box that says '3) Click on "Save new project"'. Another orange arrow points from a callout box that says '1) Select "Add new project"' to the 'Add new project' option in the left sidebar. The sidebar also shows other options like 'Open projects (103)', 'Closed projects (13)', and 'Archived (0)'. The bottom of the screenshot shows a dashboard with three donut charts: a red one with '103', a green one with '8,659', and a blue one with '45' and '5'. A legend for the charts is visible on the right side of the dashboard.

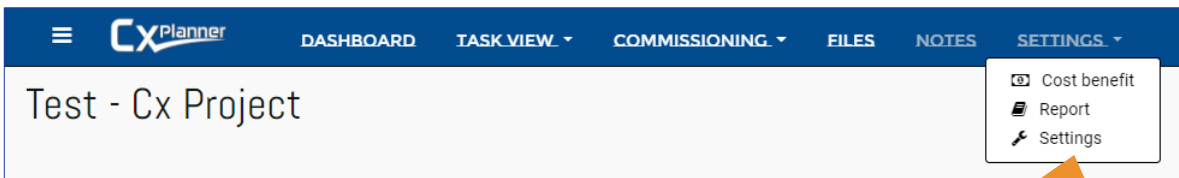
1) Select "Add new project"

3) Click on "Save new project"

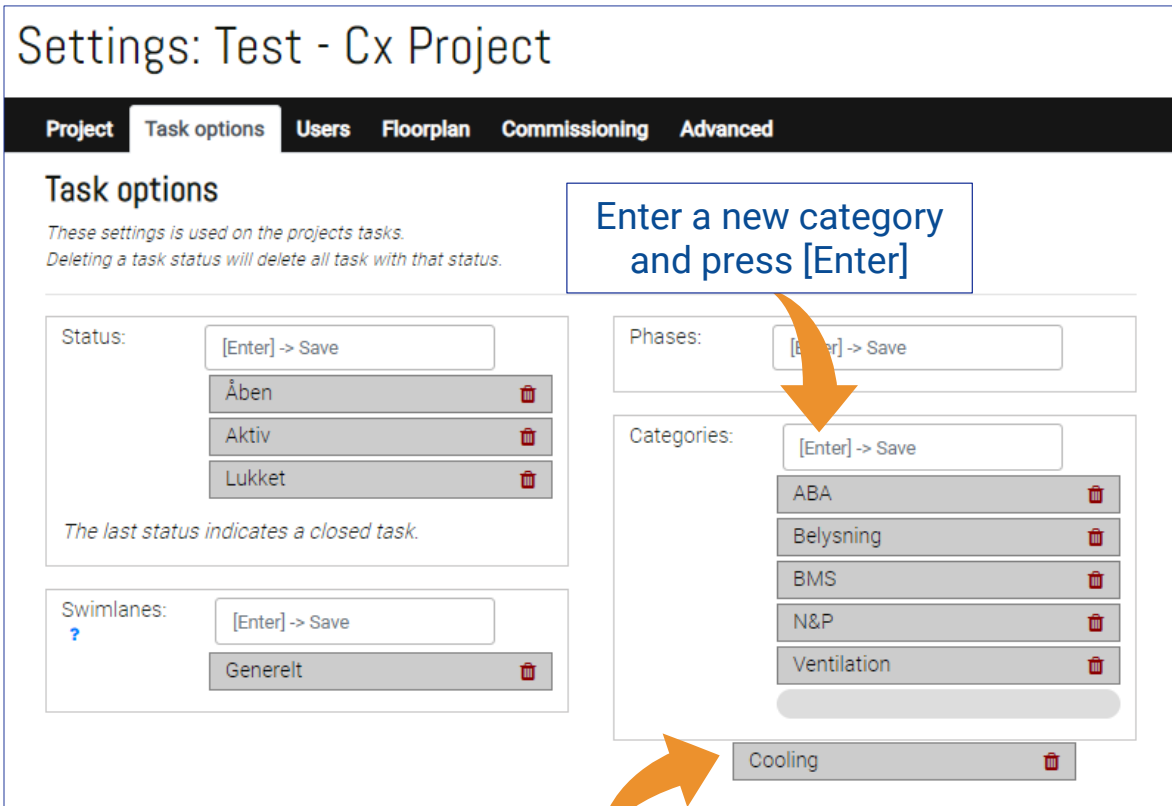
Adjust the project settings

You can always customize a project's settings. Simply open the project and select "Settings". The example below shows where you can add more task categories.

Add a new category



1) Select "Settings" inside a project



You can change the sorting by dragging the category

Cx Planner's ecosystem

Cx Planner

Practical software for handling construction projects. Tools targeted at the consultant, contractor, builder and Cx team.

www.CxPlanner.com

Cx Wiki

The Danish Wikipedia about commissioning. Descriptions and guidance for the various commissioning activities.

www.CxWiki.dk

Cx Adviser

Commissioning adviser on tender documents and your construction cases within commissioning, technical installations and construction management.

www.TTJ.dk

Cx Guide

Danish book about the commissioning process. A practical guide for performing all commissioning activities, cf. DS 3090, ASHRAE G0 and ASHRAE STD 202.

www.CxGuide.dk

Cx Strategy

Strategic sparring around the implementation of commissioning in client, consultant and contractor companies.

www.TTJ.dk

Cx Education

Education and training in the commissioning process in all parties in the project. Detailed education for Cx specialists.

www.TTJ.dk