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# Cx Planner

## Getting started for users

- Introduction for new users

Cx Planner

**Cx**Planner

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# Welcome!

Welcome to Cx Planner! We are happy for that you have joined Cx Planner. We are looking forward to have 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](mailto:support@cxplanner.com).

## Who is the guide made for

This guide is targeted at users in Cx Planner, which is created with the status "User". This means that you can basically not create new projects yourself, but other project users can add you to projects.

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](mailto:support@cxplanner.com).



# Content

This guide provides a basic introduction to the Cx Planner. If you want to get to know more of Cx Planner's functions, you can then read our guide called "Part 2".

## **PART 1 - Basic introduction**

- 1) Your new user
- 2) Update your password
- 3) Navigation in Cx Planner
- 4) Open a project
- 5) Write a comment on a task

## Your new user

This section shows you how to log in with your new user and customize your profile. You should have received an email with information about your new user.

### Confirmation link

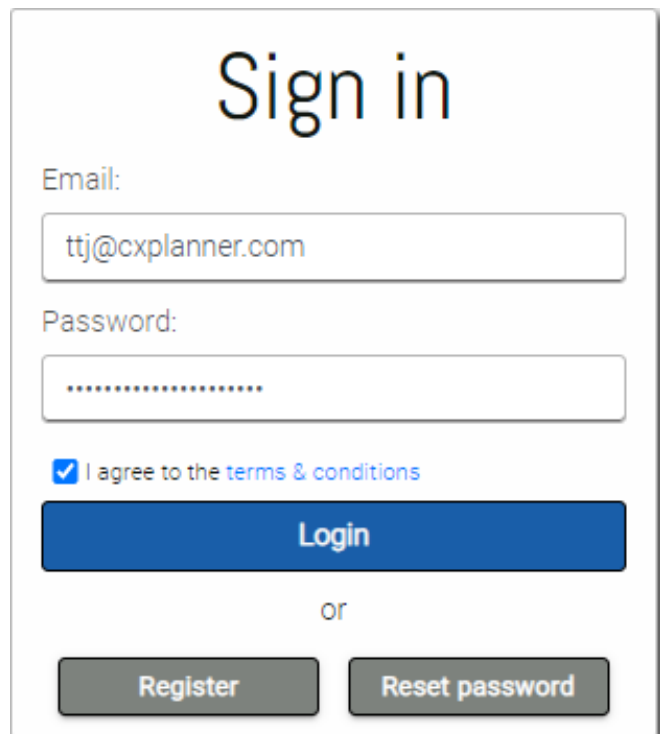
In your welcome email there is a link, a confirmation link, and your password. Start by clicking the confirmation link - then your email address will be approved for use with Cx Planner.

### Login with your new user

You can now log in to Cx Planner. Simply go to the login page at: <https://cxplanner.com/login>

Here you will be greeted at the screenshot to the right, where you must enter your login information and press "Login".

Use your email address and the password that was in the welcome email.



The screenshot shows a 'Sign in' form with the following elements:

- Sign in** (large heading)
- Email:** Input field containing `tj@cxplanner.com`
- Password:** Input field with masked characters (dots)
- I agree to the [terms & conditions](#)
- Login** (blue button)
- or
- Register** (grey button)
- Reset password** (grey button)

# Update your password

The password you received in the welcome email may be difficult to remember. You can therefore immediately change your password to something you can remember.

When you have changed your password, go back to the front page of [www.CxPlanner.com](http://www.CxPlanner.com).

Sidebar → My profile → Password

The screenshot shows the 'Edit profile: Thomas TJ' page. The left sidebar contains a menu with 'Account settings' highlighted. The main content area includes a 'Settings' section with fields for 'Your name' (Thomas TJ), 'Email' (tj@ttj.dk), 'Old password', and 'New password'. There is also a '2 Factor authentication (Optional)' section. To the right, there are 'Mail Notifications' and 'Push Notifications' sections. An orange arrow points from the 'Account settings' menu item to the 'Settings' section. Another orange arrow points from the 'Old password' field to the 'New password' field. A third orange arrow points from the 'Save' button at the bottom of the settings form to the text '3) Save your new password'.

1) Choose "Account settings"

2) Insert your new password

3) Save your new password

## Navigation in Cx Planner

**Dashboard 1** is when you are just logged in. Here you get an overview of all the projects you have access to.

**Dashboard 2** is when you open a project. Here you will be able to see data for this one project.

**Sidebaren** on the left is always available. It is through this that you can access your projects, your profile page and much more.

### Dashboard 1 - overview

The sidebar with access to everything

Overview of the projects you have access to

**Dashboard 1**

Thomas TJ

Find project

Find task

- Dashboard
- Projects
- Templates
- Notebooks
- Status report
- To-do lists
- Configuration
- Account settings
- Users
- Logout
- Help
- Support
- Settings

**User information**

Name: Thomas TJ  
 Email: ttj@cxplanner.com  
 Company: Cx Planner  
 Status: Admin  
 Registration: 2017-12-20  
 Nr. of projects: 103

**Project navigation**

5 års eftersyn	CPH
AMKB	CPH
CPH Cx Team	CPH
CPH Cx Team granskninger	CPH
CSC II	CPH
Cx Book - vejledning og værktøjer	CPH
Cx ERFA	CPH
Cx Hjemmeopgave	JCJ consult
Cx information	CPH
Cx Manager	CPH
Cx Manager review	CPH

**Latest activity**

[P-04611 - FINE] Task ID 1312: HFV4AF50 - "VVB energi" - kabelmærke - AS7116-15.1.5 CTS adresse - HFV4AF50 (Q81,F81)  
2020-11-03 - 12:09 Peter Lyngø

[P-04611 - FINE] Task ID 1312: Peter Lyngø slettede en besked: CTS adresse - HFV4AF50 W10  
2020-11-03 - 12:08 Peter Lyngø

[P-04611 - FINE] Task ID 1273:

**Project status**

- Open: 103
- Closed: 13
- Template: 0

**Task status**

- Åben: 1,707
- Afsluttet: 0
- Aktiv: 0
- Backlog: 0
- Closed: 8,859
- Igang: 0
- IGV: 0

**Assigned tasks**

- Åben: 25
- Aktiv: 5
- Lukket: 45

## Open a project

You can only see projects that another user has given you access to. If you do not have access to a project, write to the project administrator.

Once you have access to a project, you may have different project roles - this is determined by the project administrator. In some cases you will only be able to comment on tasks, in other cases you can create tasks yourself.

### Dashboard 2 – project overview

Access to the sidebar

In "Task overview" you'll work with the tasks

You navigate the project via the blue top line

Project information

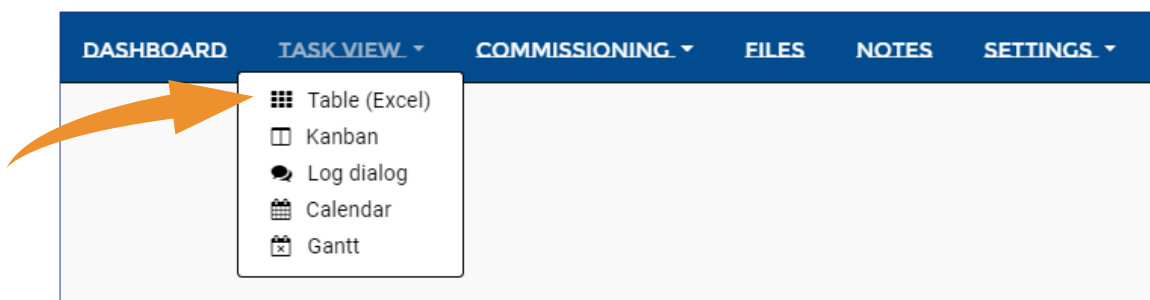
Users with access to the project

# Write a comment on a task

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## Choose the "Table"-overview

Once you have gained access to a project, you can select "Task overview" and then the "Table" overview, to access the project's tasks.



## Overview of tasks

Once you have selected the "Table" overview, you will see all tasks on the project. Click on one of the tasks to open it.

The screenshot shows the 'Task overview' for a project named 'Test - Cx Project'. The table lists tasks with columns for ID, Status, Cx, Name, Category, System, Responsible, End date, Modified, and Items. An orange arrow points to the 'Responsible' column of the first task.

ID	Status	Cx	Name	Category	System	Responsible	End date	Modified	Items
34	Åben	Test	Skærbilleder: Bruger kald til skærbillede testes for korrekt henvisning.	ABA	ABA-FINE-01-001			2020-02-12	1
28	Åben	Machine Safety	Risikovurdering indeholder ikke sensor		AEV0'CE01			2018-12-05	1
30	Åben	Test	⚠️ Ventilation: Kondensaflobs hældning og at den ikke tomblæses under drift	ABA	ABA-FINE-01-001		⚠️ 2019-02-20	2020-02-12	1



# Write a comment on a task

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## Write a comment

Once you have opened a task, you can always write a comment on it. Depending on your project role, you can also change the task settings.

**Opdater opgave**

Opgave navn:\*

Ved aktivering af ABA melder ABDL for aktiveres døren, men signaloverførelsen til vagtcentralen udestår.

Projekt	Test - Cx Project
Opretter	Thomas TJ
Status	Åben
Swimlane	Generelt
Ansvarlig	Thomas TJ
Anlæg	* ABDL08
Start dato	åååå-mm-dd
Slut dato	åååå-mm-dd
Vedhæftning	Filer / Billeder

Der er indkøbt test-gas til testen af ABA melder.

Der er planlagt ny test af ABDL anlægget tirsdag næste uge med deltagelse af entreprenøren, rådgiver og Cx-teamet.

Entreprenørens kvalitetssikringsmateriale er gennemgået, og der er fremvist dokumentation for Pre-test.

[Enter] -> Save  
[Shift]+[Enter] -> New line

Kan lukkes Billede Gem

3) Click here if the task has been solved

1) Write your comment here

2) Klik here or pres [Enter] to save

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# 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](http://www.CxPlanner.com)

## Cx Wiki

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

[www.CxWiki.dk](http://www.CxWiki.dk)

## Cx Adviser

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

[www.TTJ.dk](http://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](http://www.CxGuide.dk)

## Cx Strategy

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

[www.TTJ.dk](http://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](http://www.TTJ.dk)