What is CxAlloy Total Quality?

CxAlloy TQ is a cloud-based web application for managing project quality during the design and construction phases of a building. It provides one interface for all team members to perform their job functions efficiently and collaborate effectively.

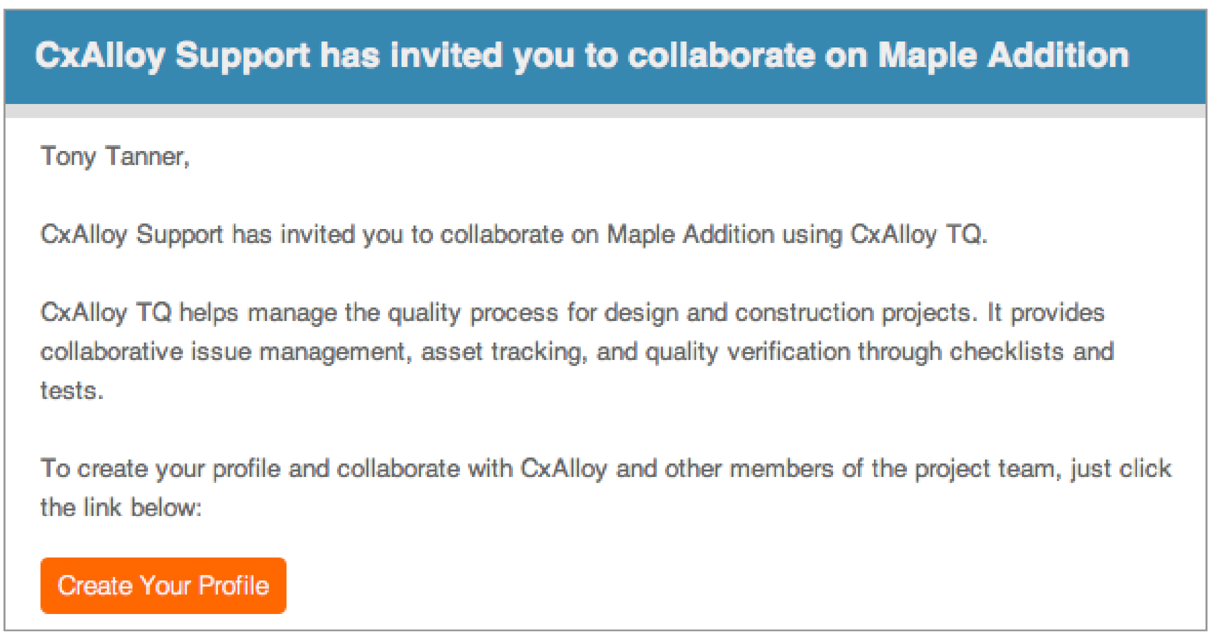
Architects and Engineers can use it to enter design comments and field reports. Contractors can use it to manage punchlists, track equipment installation, and share submittals. Commissioning agents can use it to verify system operation and fulfill all required LEED reviews and tests. There’s something for everyone!

And by storing the information in a central location, CxAlloy is also able to generate real-time, accurate performance indicators of the status and performance.

- **Intuitive.** Simple and easy to use means less time spent learning the system and more time getting work done.
- **Instant.** CxAlloy TQ is web-based, so all information is real time for the entire project team.
- **Collaborative.** No more multiple versions. CxAlloy TQ provides one place to store all critical documentation.

New Accounts

New account users will receive a welcome email to CxAlloy notifying you, the user, that you have been added to CxAlloy. The email will provide a link to activate your account. Following the link will take you to a screen to create an account, where you will be required to complete your First Name, Last Name, and Password.



CxAlloy Support has invited you to collaborate on Maple Addition

Tony Tanner,

CxAlloy Support has invited you to collaborate on Maple Addition using CxAlloy TQ.

CxAlloy TQ helps manage the quality process for design and construction projects. It provides collaborative issue management, asset tracking, and quality verification through checklists and tests.

To create your profile and collaborate with CxAlloy and other members of the project team, just click the link below:

Create Your Profile

If you already have an account with CxAlloy for another project, you will be asked to confirm the new project. This project will now be listed with your other projects.

Your profile page has many configurable options, including notifications and password resets. Please take a look here and make sure everything is set the way you like it.

Creating A New Password

If you have forgotten your password, select the “Forgot your password?” link at the top right of the login area. You will be brought to a new page that will allow you to reset your password. Enter your email address, and a new password will be sent to you. You can change your password from your account page.

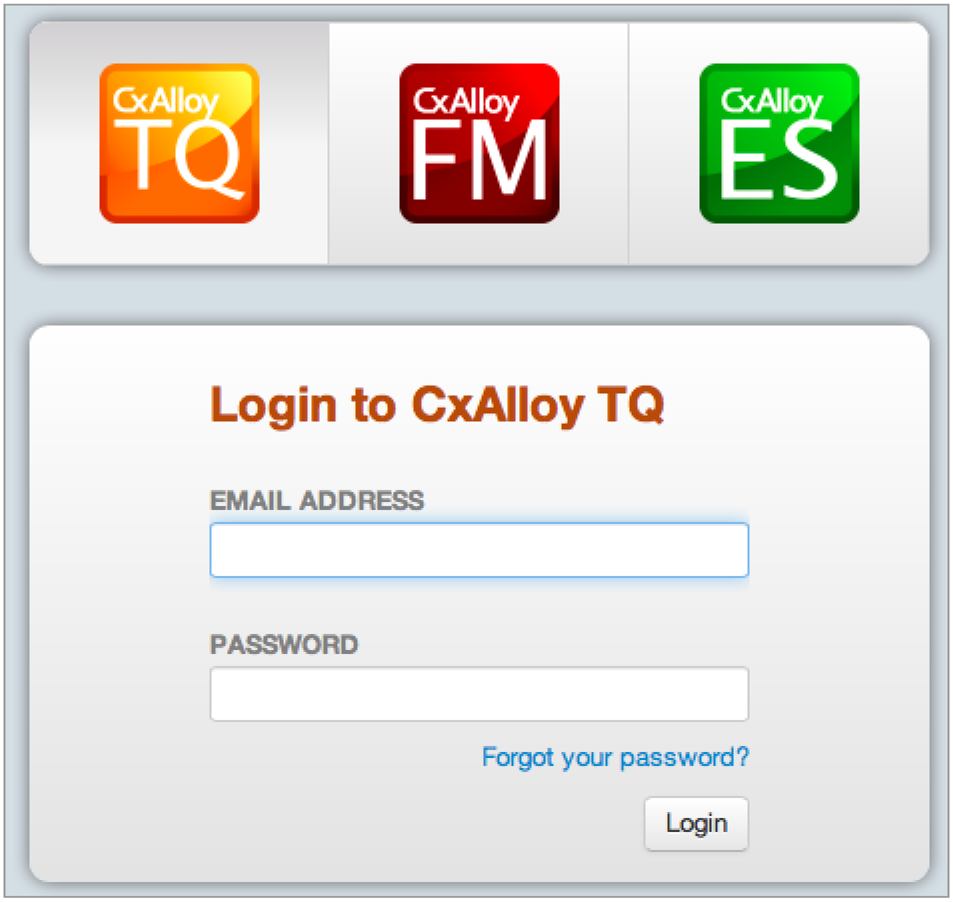
Accessing the Site

After your account has been created, you will be able to access the site directly via the login page.

Step 1: Go to cxalloy.com and click Login. This button is located at the top right of the page. You can also bookmark individual pages within a project and access them directly. You will be prompted to log in at that page.

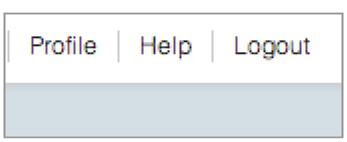
Step 2: Enter your Email and Password. Each account has a single email and password associated with it. If you forget your password, you can request a new one. We'll send it right away.

Step 3: Select your project. Within your account you will have a list of all your projects. Use the search box to quickly find projects by any field listed; it will automatically find the project as you type in the box. Click on the name of your project to access it.



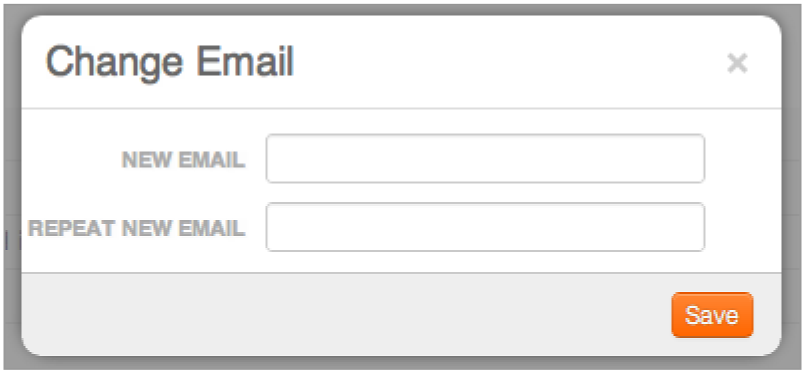
Editing Profile Information

To access your account information, go to Profile at the top of the page. Here you can view and modify details of your account. To make changes to your settings, click Edit and select the appropriate field. Click Save to save any changes.



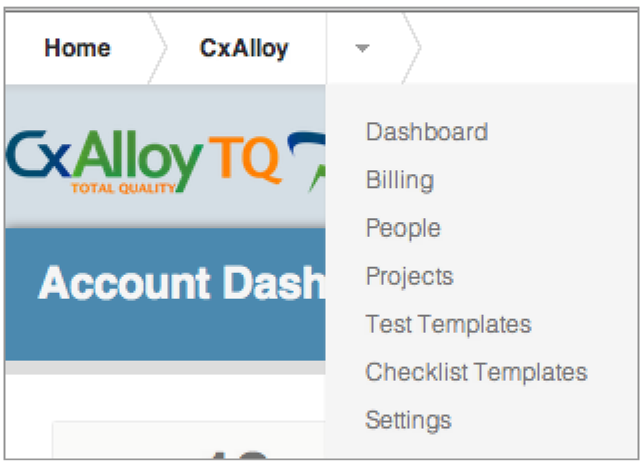
To change your password, select Change Password. Next, enter your current password and then your new password twice and click Save.

To change your email address, select Change Email and update your email. You will receive a confirmation email at your new email address.



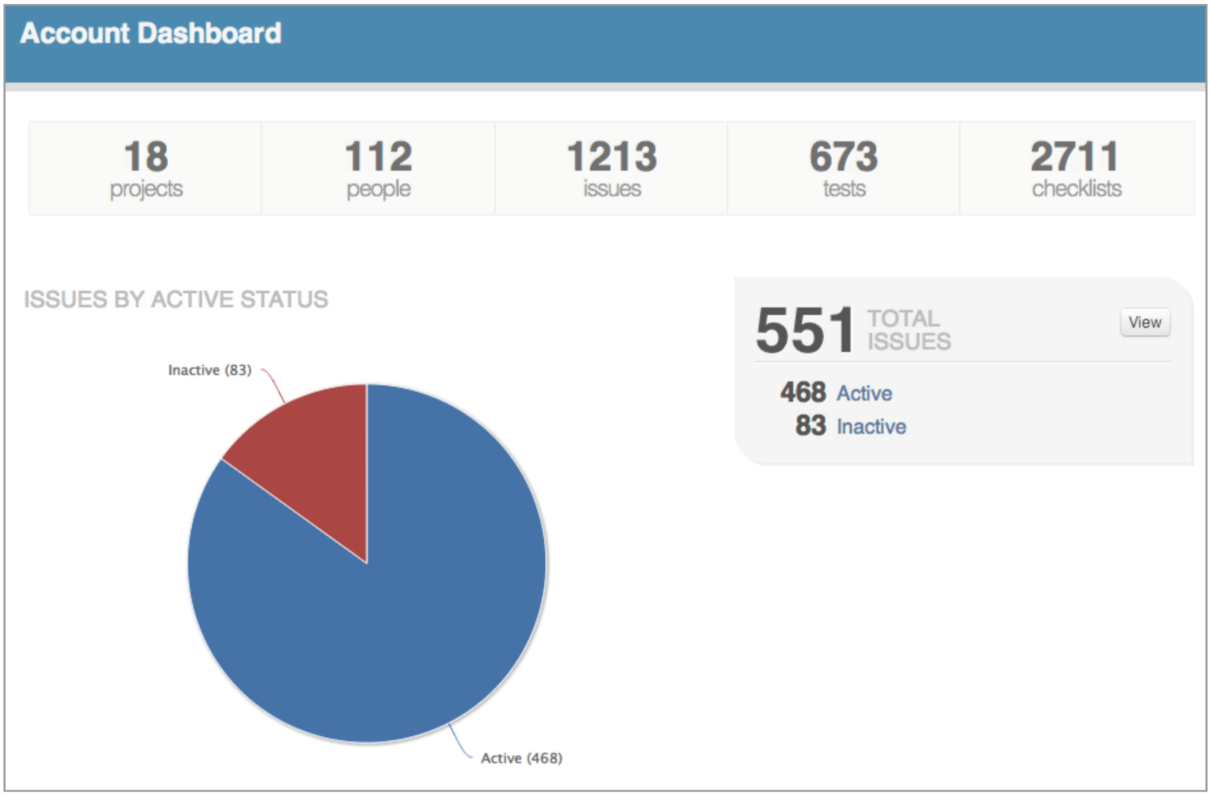
Overview

After a client account is created with CxAlloy TQ, account administrators will have access to the Account Section. This section will provide details on billing, project defaults, users, and summarized project information.



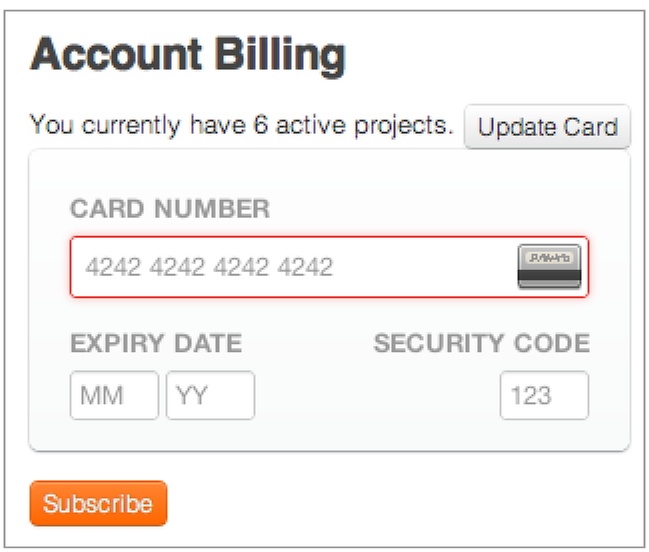
Dashboard

The Account Dashboard provides graphical displays of cumulative project data. This includes project totals, cost savings, and statistical evaluations of performance.



Billing

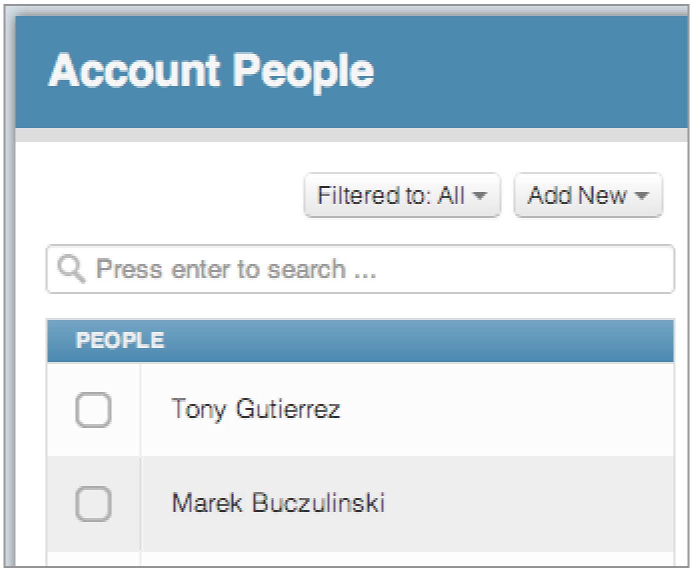
The Billing section is located under the Account tab. This section provides information on credit card payments and overall account status. To change billing information, click Update Card. You will then be able to enter new credit card information and save your information.



To cancel your account subscription, click Close My Account. Confirm the account closing by clicking Accept.

Account People

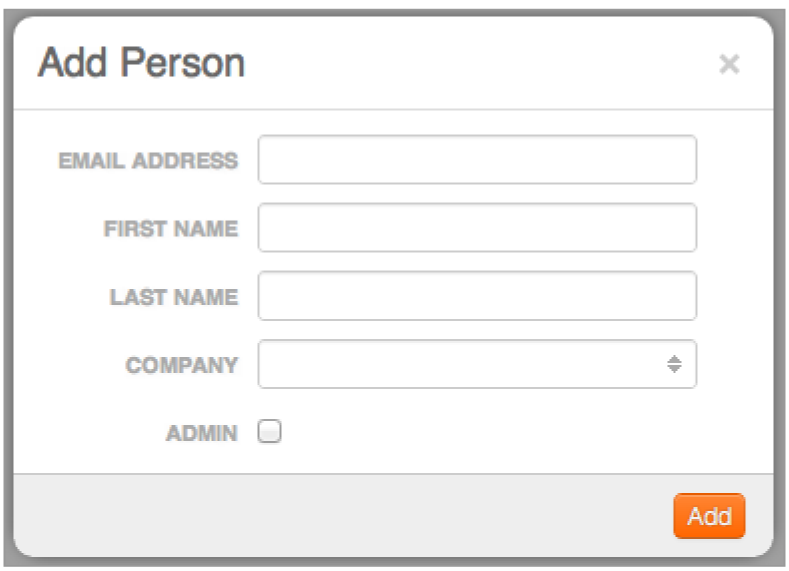
The account people section displays a list of all the people connected to an account (not to be confused with connected to a project). All records of registered or unregistered users associated with the account are located here. Profiles displayed here do not necessarily have to be connected to any projects.



Clicking a person's name will take you to a detailed view, where an administrator can edit information or set facility access levels for the person.

Inviting People

There are two ways to invite people to your account. As an administrator of an account, you can directly add someone by clicking the "Add New" button and making the new person a user profile or higher, or you can upgrade an existing profile with a "Contact" role to a user or higher.



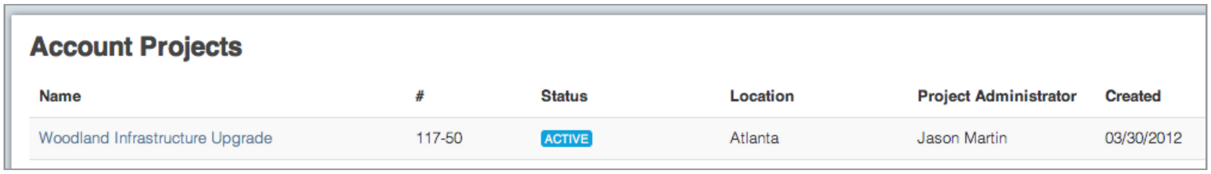
After doing so, the person will be sent an email notifying them of the invitation and requesting them to set up a password.

The word "Invited" will appear next to the person's name as a notification that the invite and e-mail was sent. If a user hasn't accepted an invite or has lost their e-mail, it is possible to resend the invitation by clicking the person's name to navigate to their detail page. To resend the invite, click the "Resend Invite" button.

A notification will appear notifying the user that the invitation has been successfully resent.

Projects

The Project section contains a full listing of all projects within the account. These include both active and archived projects.



Account Projects

Name	#	Status	Location	Project Administrator	Created
Woodland Infrastructure Upgrade	117-50	ACTIVE	Atlanta	Jason Martin	03/30/2012

To search for a particular project, enter the query into the search bar and click Search.

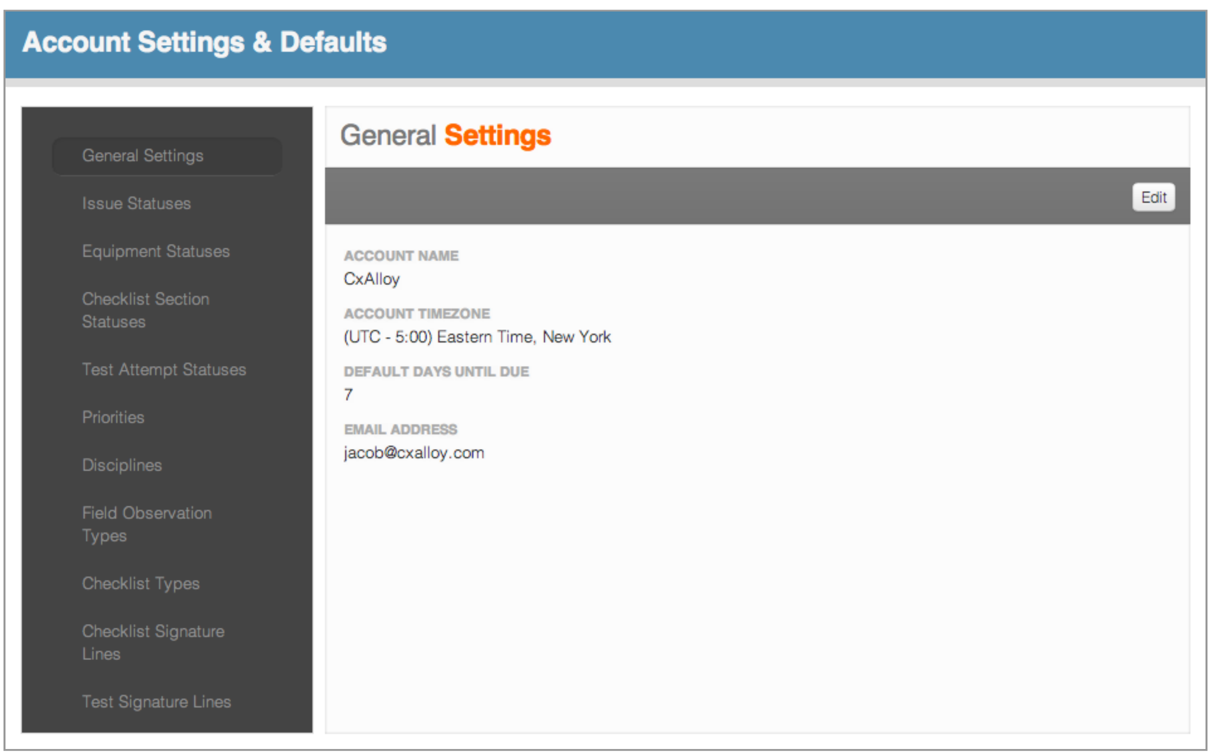
Settings Overview

The Account Settings is located under the Account tab. This is where you can view and update the basic settings for your account. Each account has default settings that will be applied to all projects created within the account. This allows account holders to set project settings globally without having to manipulate project settings individually.

To upload a logo click Upload Logo at the top right. Choose a .jpg file from your computer that is at least 200 pixels wide by 200 pixels tall. CxAlloy TQ will optimize this image for all page viewing and prints.

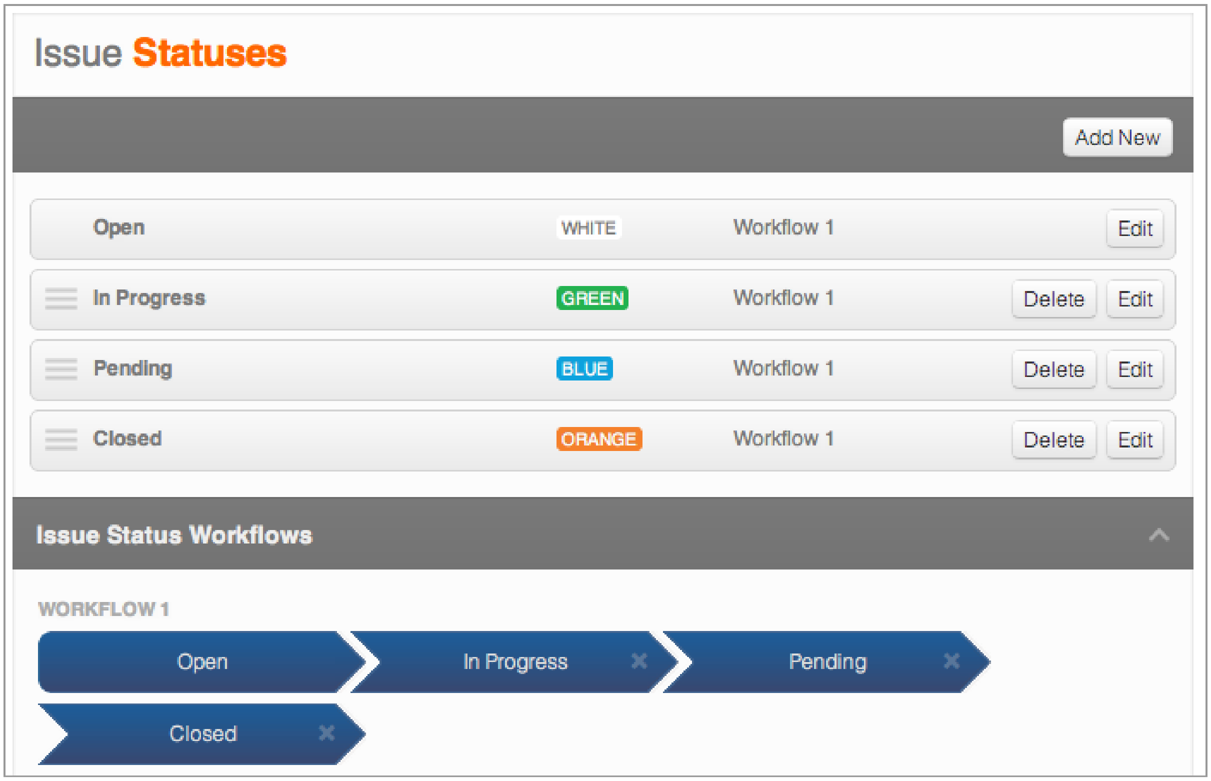
General Settings

You can modify basic settings for your project under General Settings. This includes information about the building or groups of buildings.



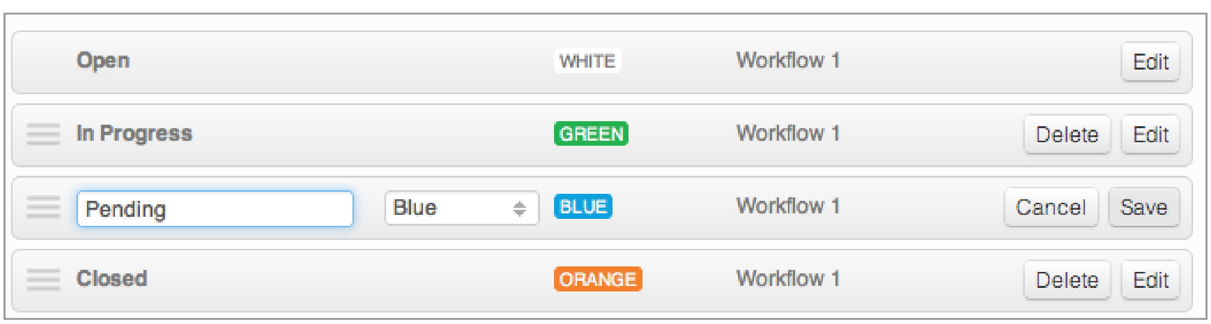
Issue Statuses

The statuses of all issues can be customized with several options. These include status name, color, workflow, and permission.

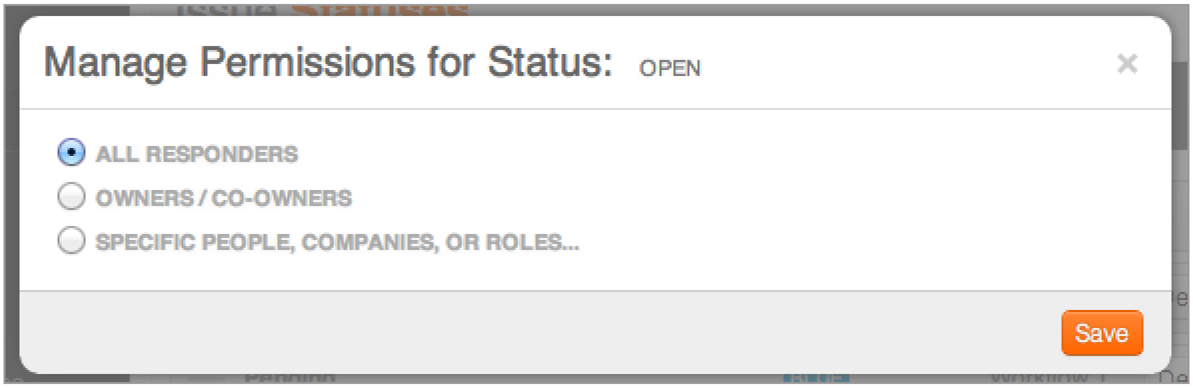


To add a new status, click Add New. Type in the status name and select a color from the list. Click Save to save your new status.

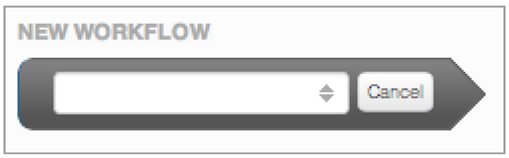
To edit an existing status, click Edit on the status row. You can change the name or color. Click Save to save your changes.



To add permissions to statuses, click Permissions on the status row. Select the permissions option from the list and click Save. Note: this is available only at the project level.

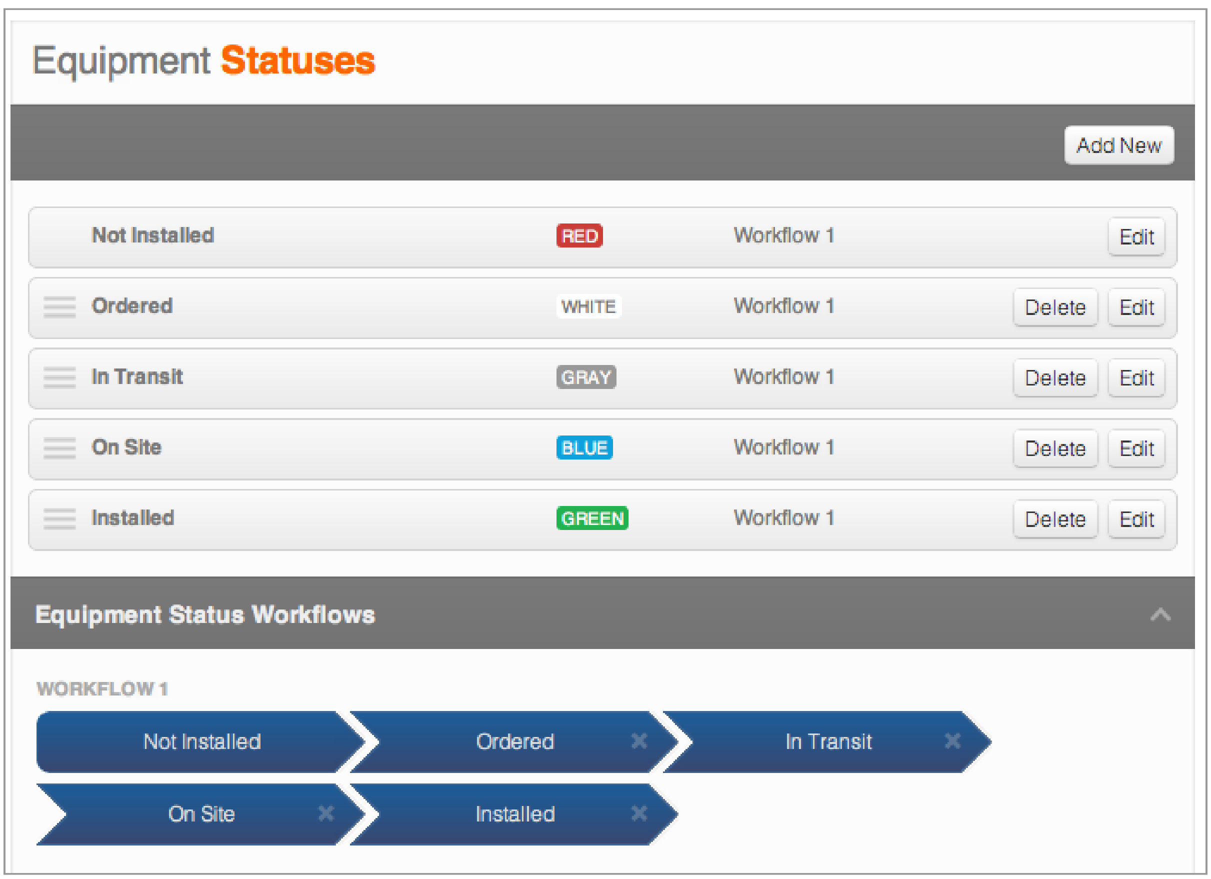


To add status to a workflow, you must first create the workflow. To add a workflow, click New Workflow. Next add statuses by dragging them from the Issue Status list. You can make changes to the workflow order by dragging the status where desired.



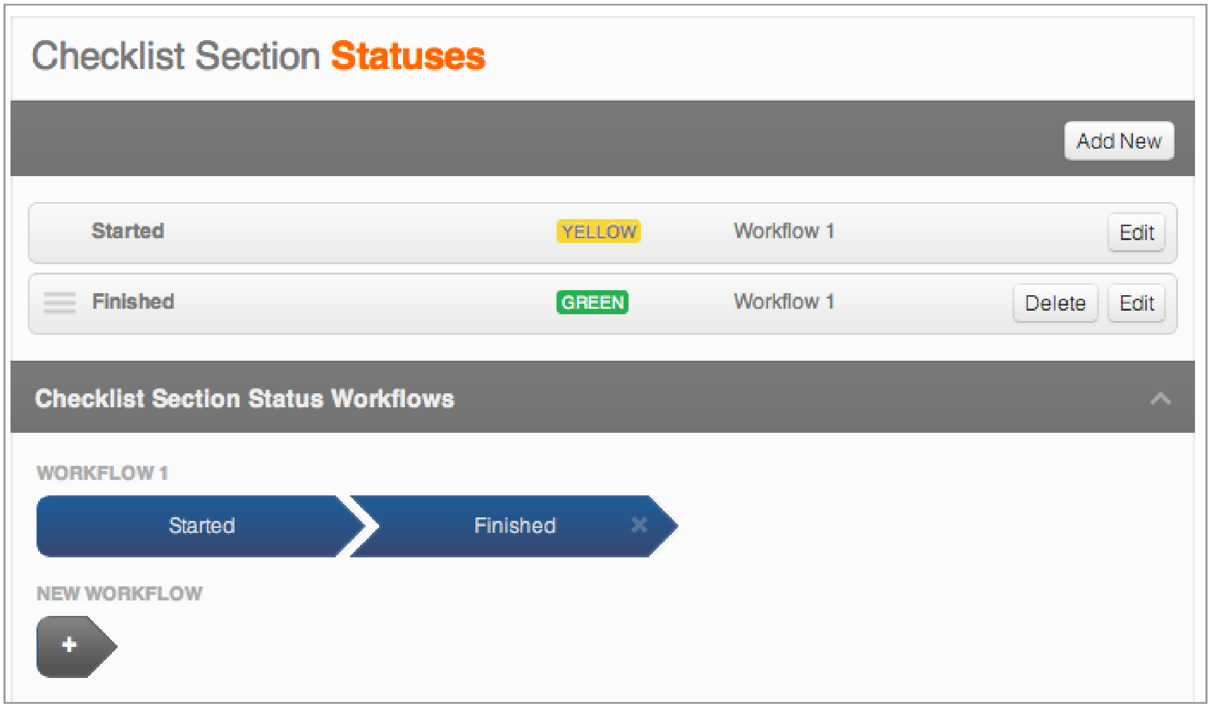
Equipment Statuses

Each equipment item has the option of status assignments similar to issues. See the Issue Status section for more information.



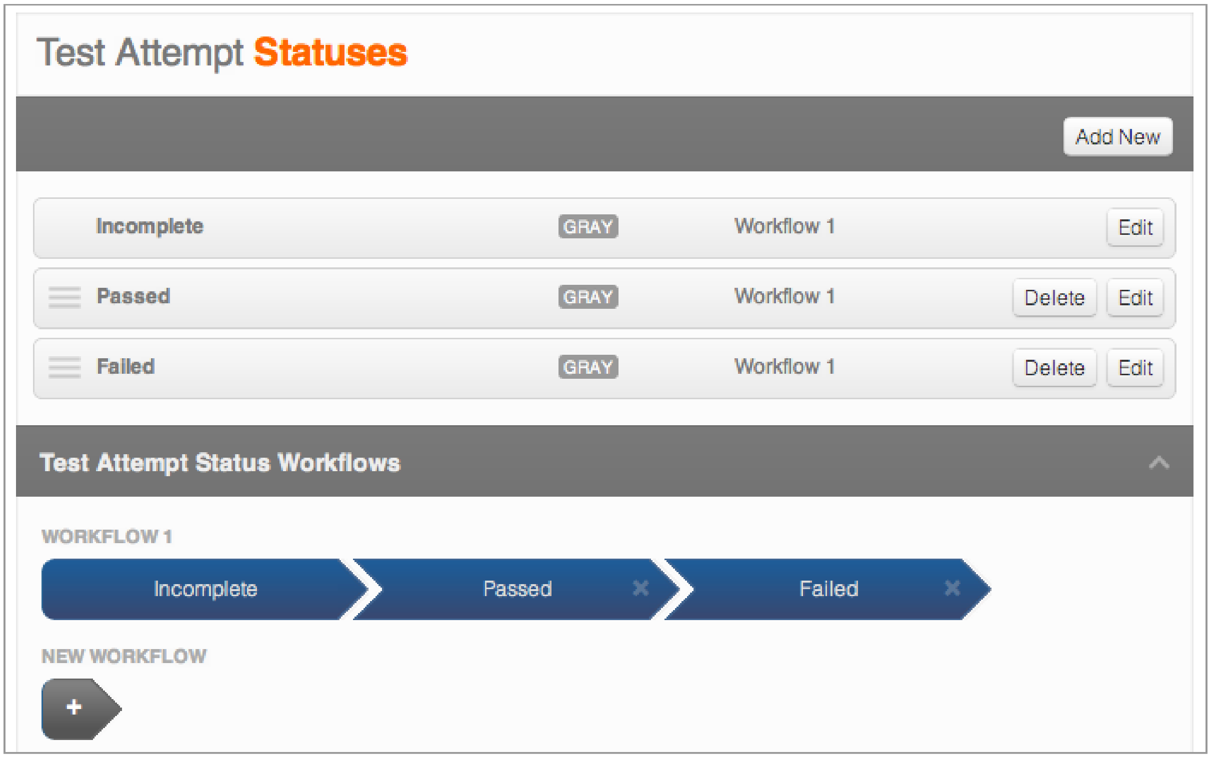
Checklist Statuses

Each checklist has the option of assigning statuses to individual sections within the checklist. The creation and editing of these statuses are similar to that of issues. See the Issue Status section for more information.



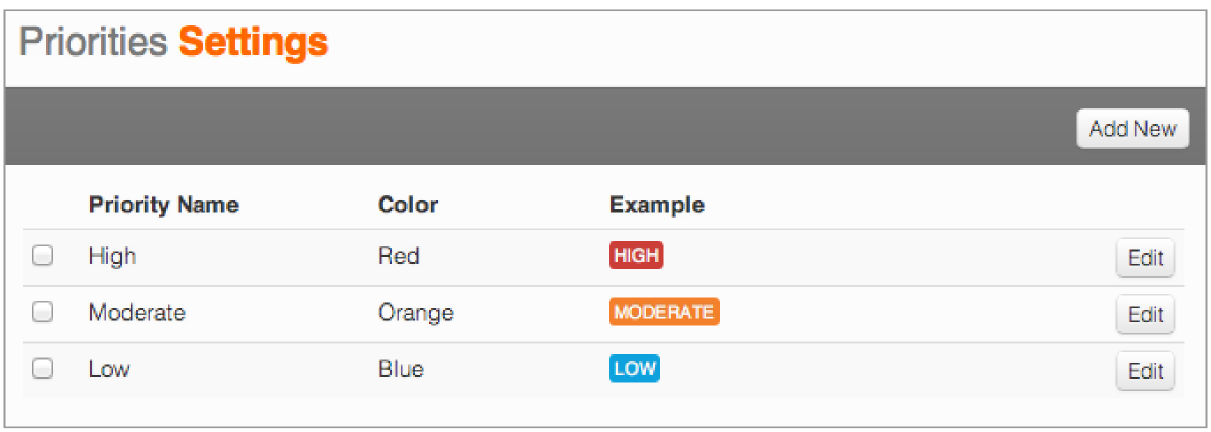
Test Statuses

Each test has the option of assigning statuses to test attempts within the test. The creation and editing of these statuses are similar to that of issues. See the Issue Status section for more information.

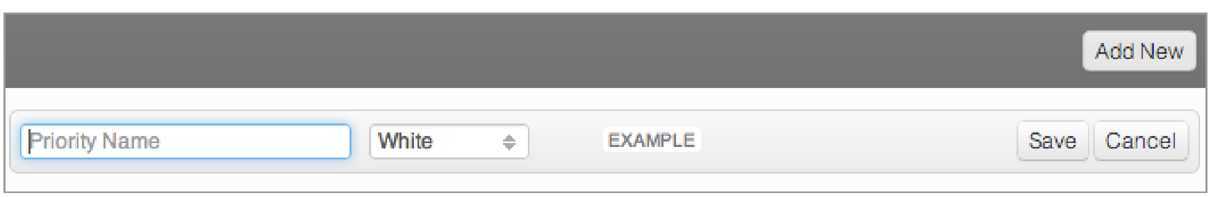


Priorities

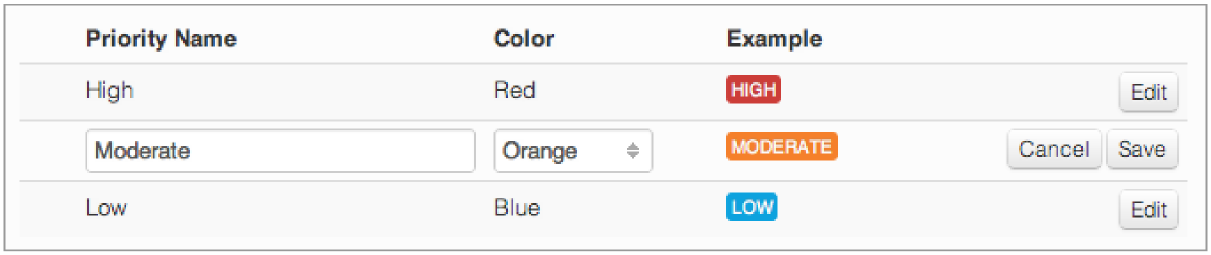
The priorities of all issues can be customized with several options. These include name and color.



To add a new priority, click Add New. Type in the priority name and select a color from the list. Click Save to save your new priority.

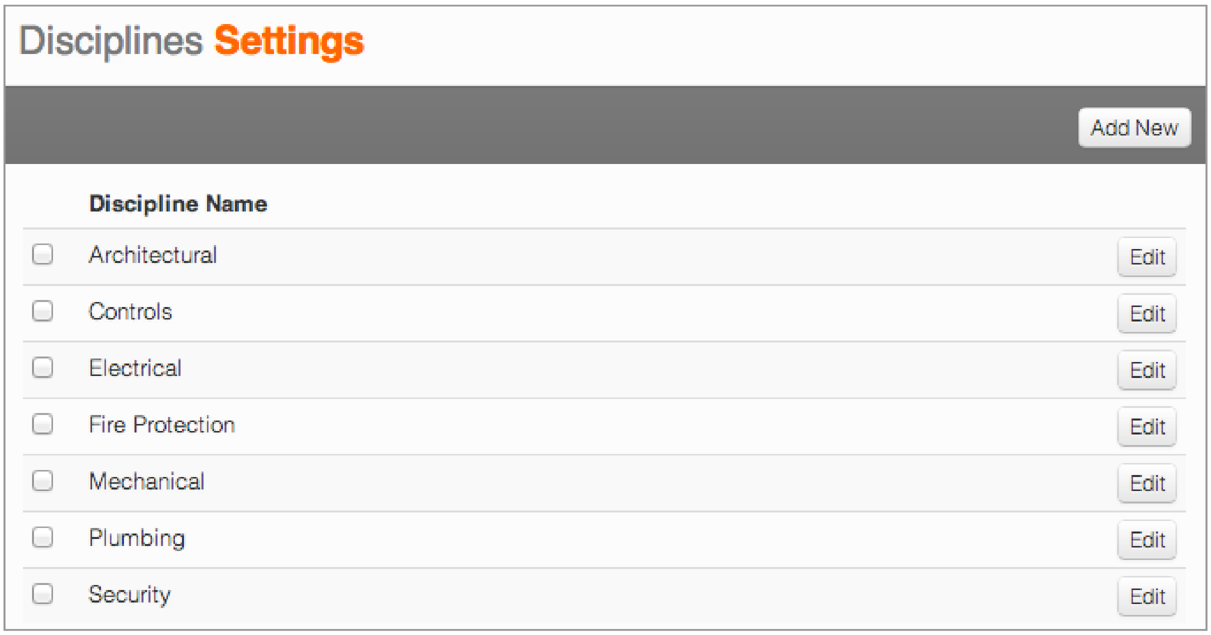


To edit an existing priority, click Edit on the priority row. You can change the name or color. Click Save to save your changes.

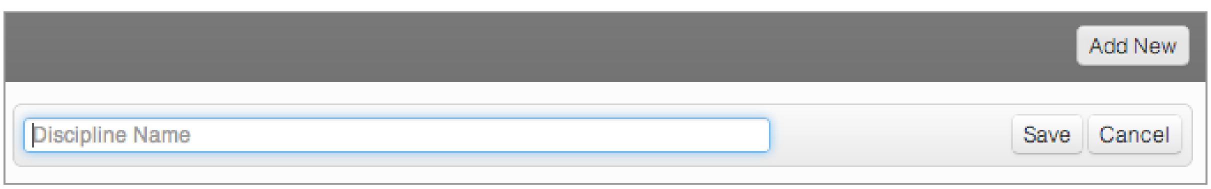


Disciplines

Each account or project can have customized disciplines.



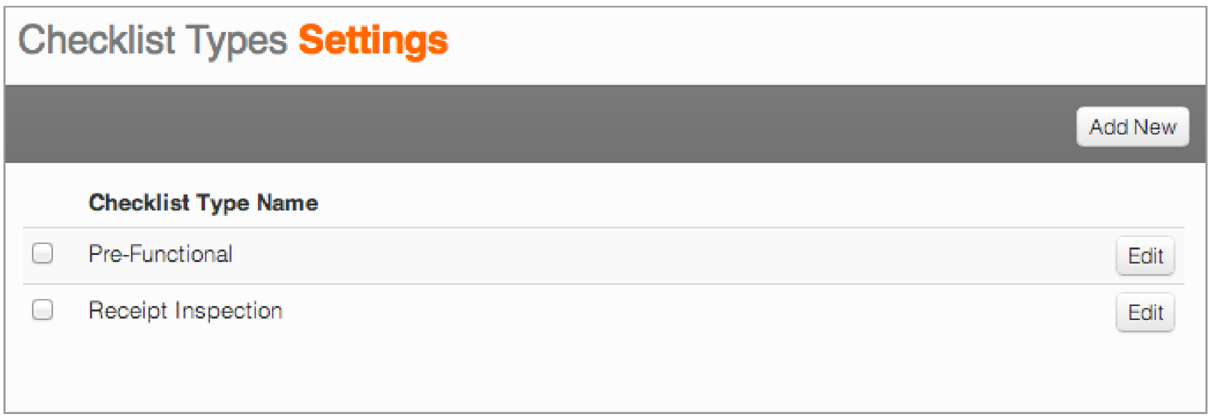
To add a new discipline, click Add New. Type in the discipline name. Click Save to save your new discipline.



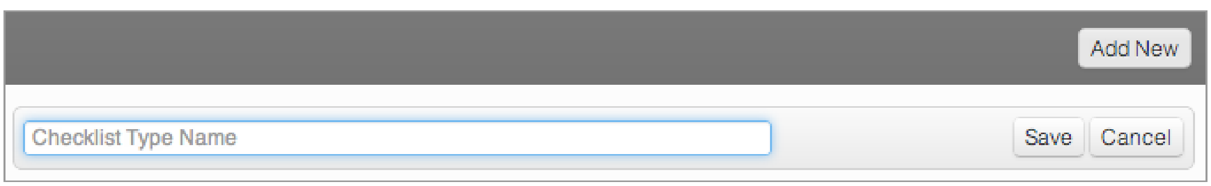
To edit an existing discipline, click Edit on the discipline row. Click Save to save your changes.

Checklist Types

Checklists can have customized types. These may include startup, pre-functional, safety, etc.



To add a new checklist type, click Add New. Type in the checklist type. Click Save to save your new checklist type.

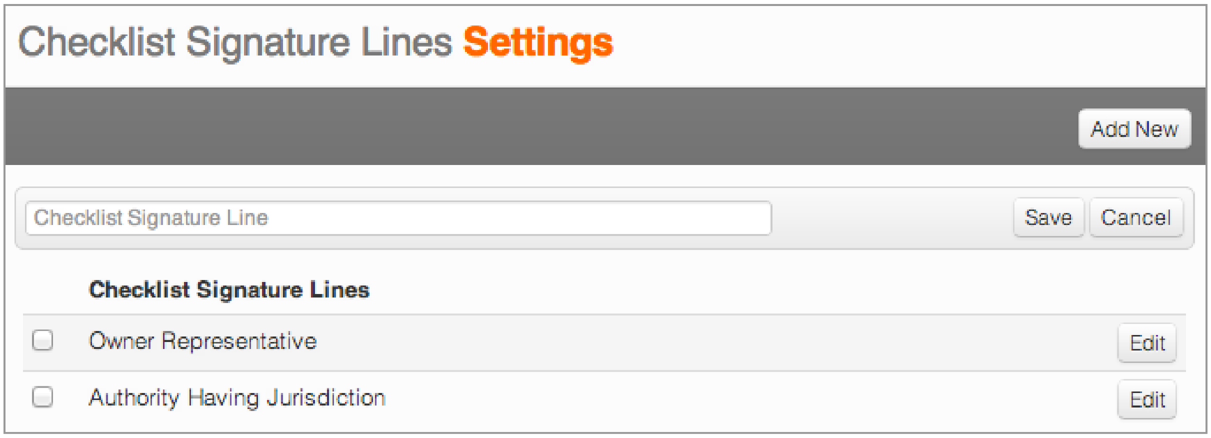


To edit an existing checklist type, click Edit on the checklist type row. Click Save to save your changes.

Checklist Signatures

Checklists can have customized signature blanks that are printed on PDF forms. These may be used for projects that require handwritten signatures.

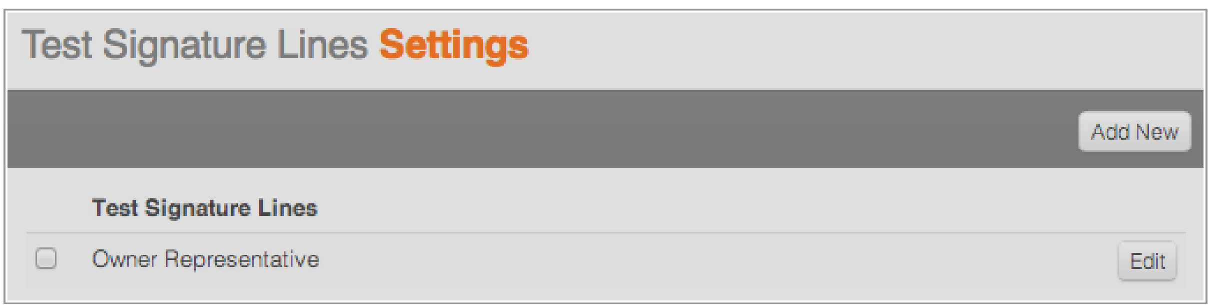
To add a new checklist signature, click Add New. Type in the checklist signature. Click Save to save your new checklist signature.



To edit an existing checklist signature, click Edit on the checklist signature row. Click Save to save your changes.

Test Signatures

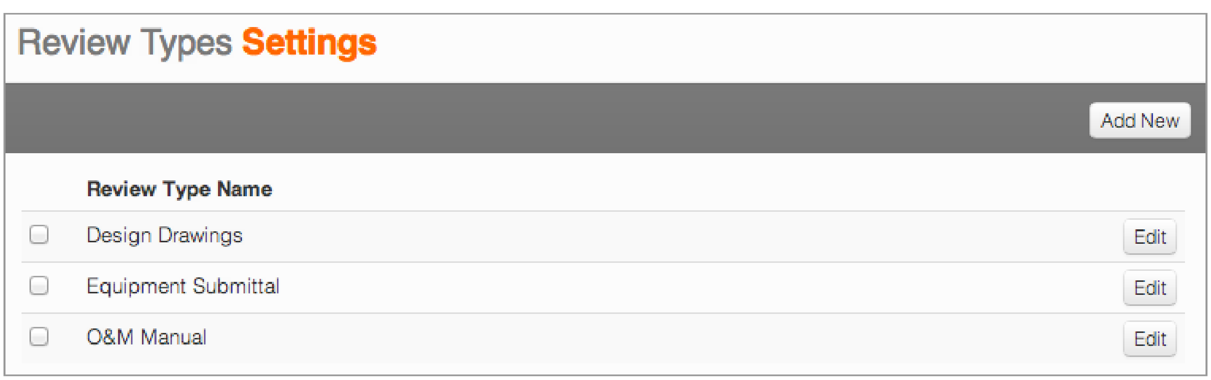
Tests can have customized signature blanks that are printed on PDF forms. These may be used for projects that require handwritten signatures.



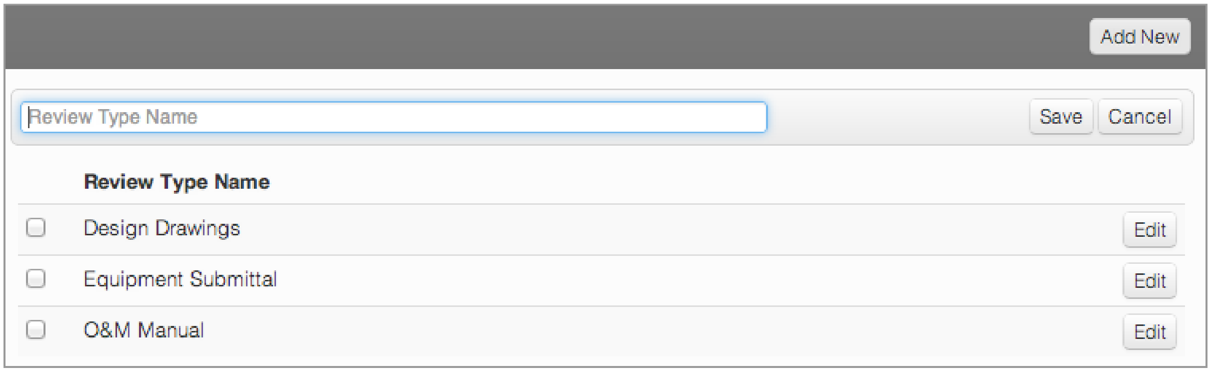
The creation and editing of these signatures are similar to that of checklists. See the Checklists Signatures section for more information.

Review Types

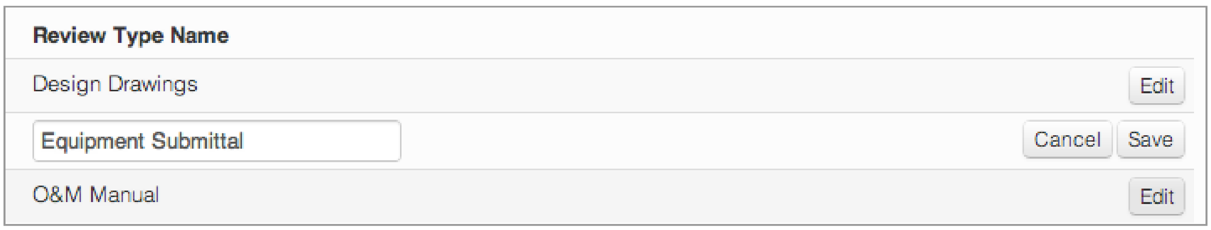
Reviews can have customized types. These may include design, submittal, LEED, etc.



To add a new review type, click Add New. Type in the review type. Click Save to save your new review type.

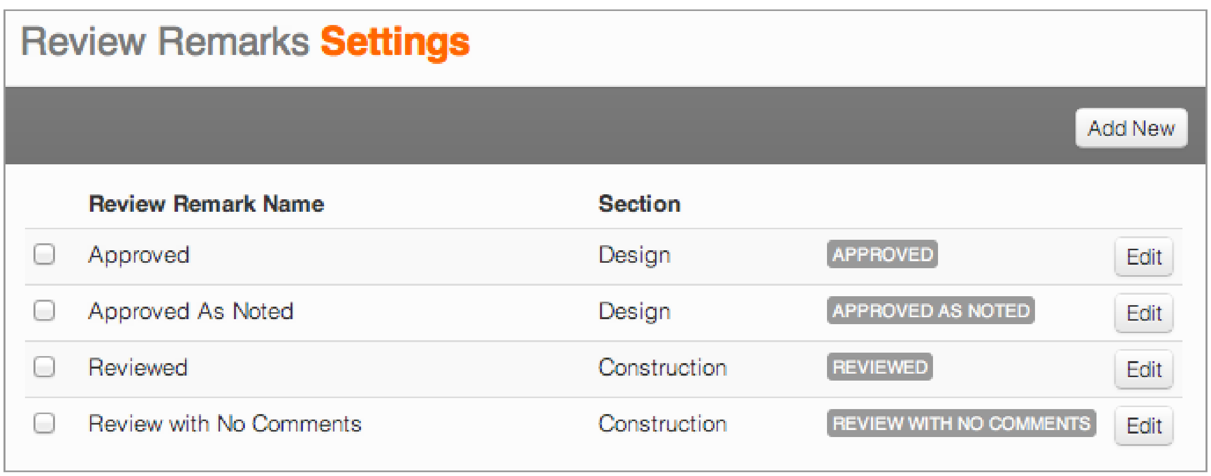


To edit an existing review type, click Edit on the review type row. Click Save to save your changes.

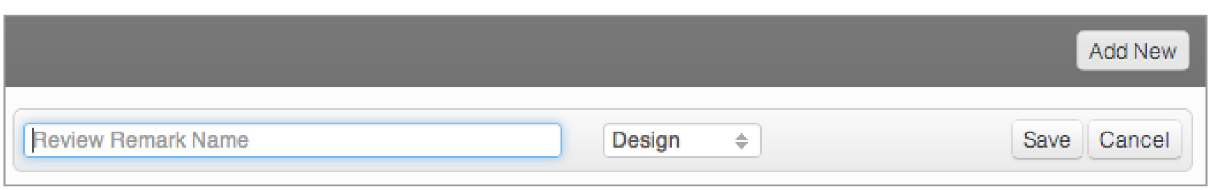


Review Remarks

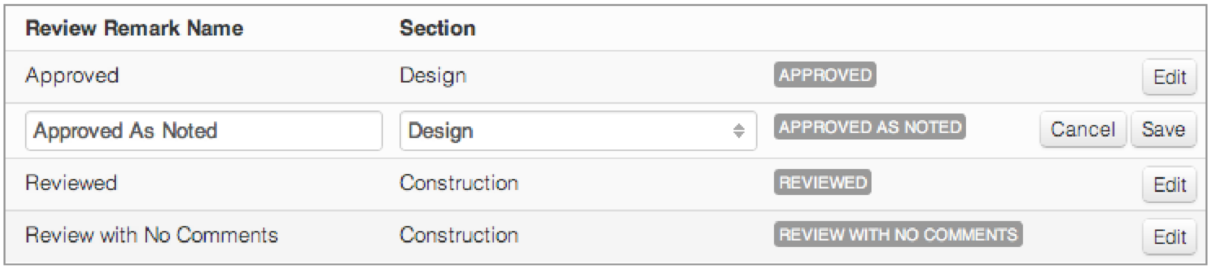
Reviews can have customized remarks. These may include approvals, rejections, or other standard comments.



To add a new review remark, click Add New. Type in the review remark and select the appropriate review section. Click Save to save your new review remark.



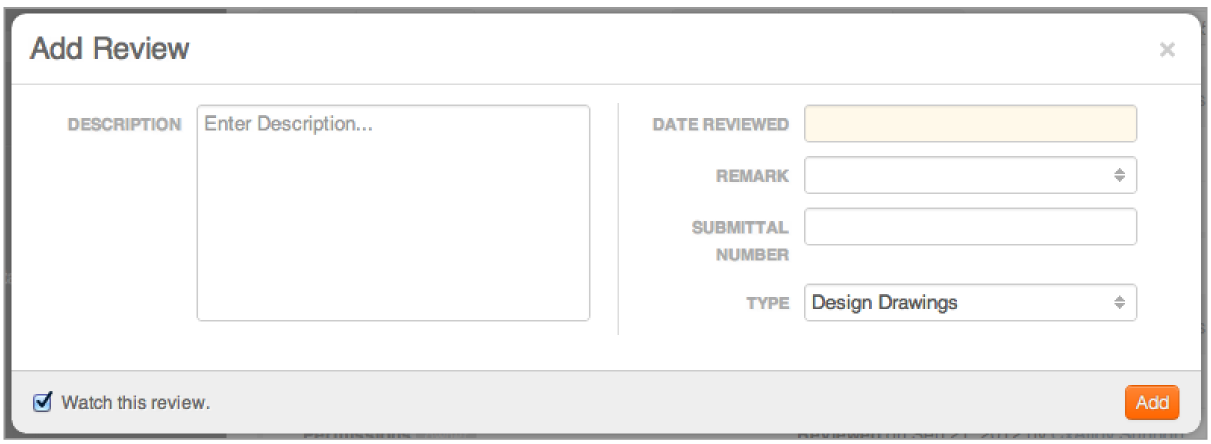
To edit an existing review remark, click Edit on the review remark row. Click Save to save your changes.



Adding New Items

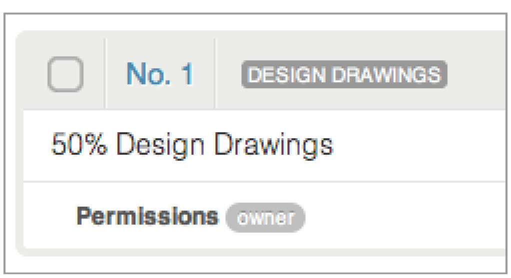
To add a new item in any category, find and click Add New.

Clicking this will take you to a form to fill out information on the new entry. Different categories have different entry forms specific to their category. Once all the information is entered, click Save.



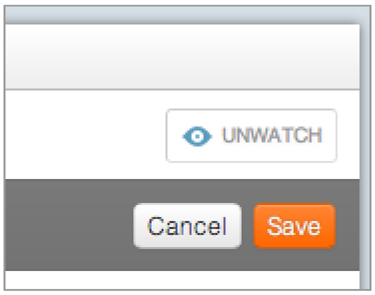
Editing Items

To edit the information of an item, select and click a specific item (issue, checklist, asset, etc.) on any page and a new page displaying more details will load.



Find and click Edit, which is usually located across from the item's name.

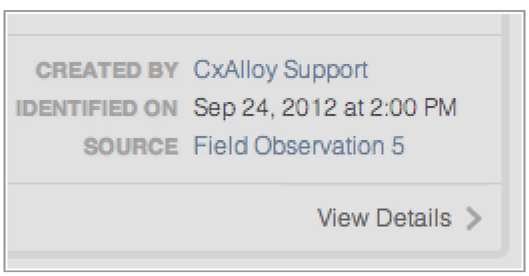
Click Save after modifying the information.



Note: Editing when viewing a specific item's page generally has more options than editing from a list of items. For more on list functions, see List functions in Basics.

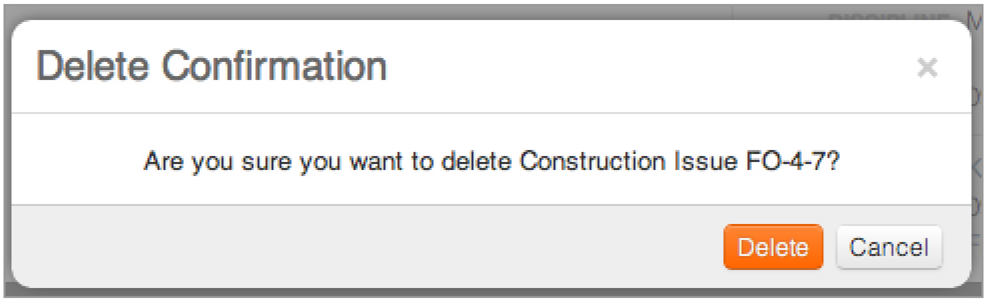
Deleting Items

To delete an item, select and click a specific item (issue, checklist, asset, etc.) on any page and a new page displaying more details will load.



Find and click Delete, which is usually located across from the item's name.

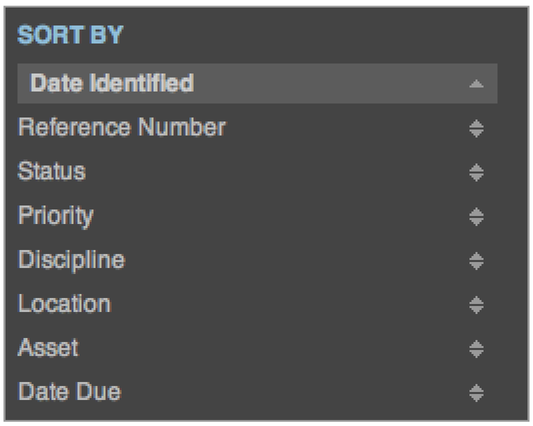
When clicked, a second confirmation of deletion will be displayed. Click Delete again if you wish to proceed.



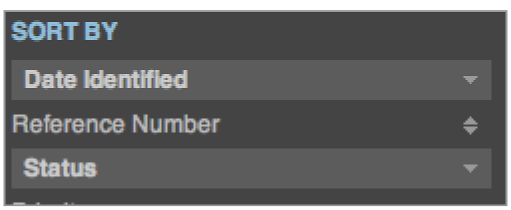
List Functions

For most pages, the default view will be a list of items. There are several functions that can be associated with the lists, which include sorting, filtering, searching, and more. By default, the list view will only show the 25 most recent entries, but you may click the number located at the top right of the list to view additional entries.

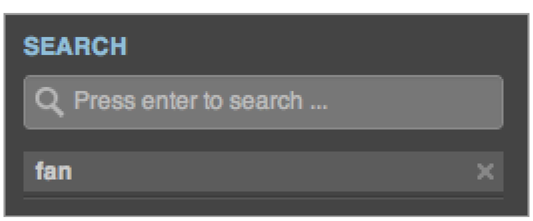
To sort a list of items, click the category name or the arrows at the top of a list of items. This allows you to sort a list of items based on various choices. Clicking any already sorted column will reverse the sort direction.



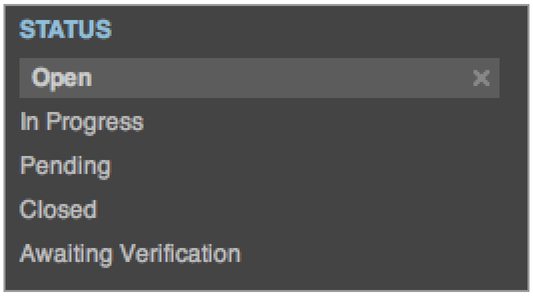
It is also possible to sort more than one column by holding the Shift key and clicking another sorting column.



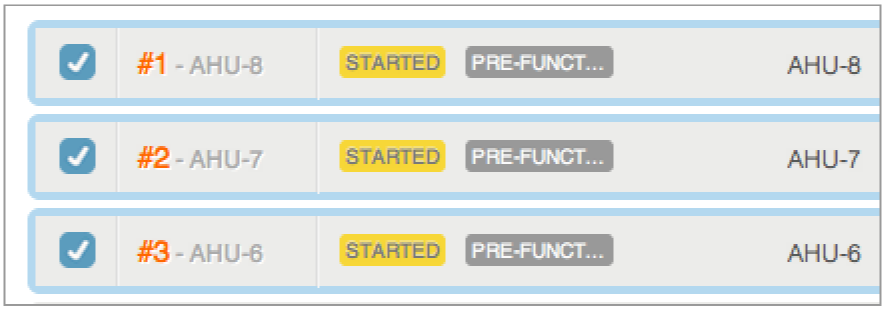
A search box is located under the section tabs, and can be used to search for specified items in a list.



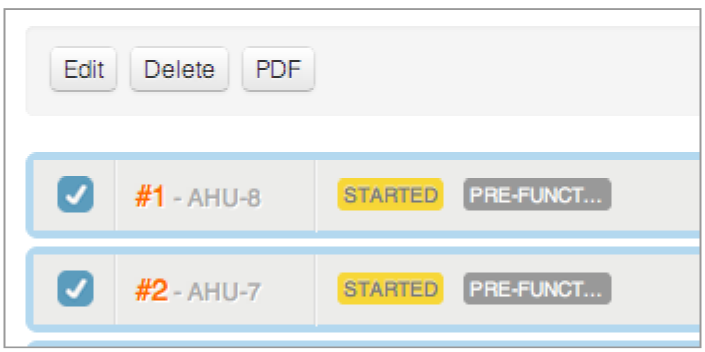
The left hand column of a list page often times contains several filters that may be applied to the list of items. This allows you to search for something based on a category.



Located next to every item is a checkbox. When viewing items in a list, it is possible to select multiple rows at once by clicking the check box for all items needed. This allows for the management of several items at once, whether it is editing, duplicating, deleting, or sometimes section-specific actions. To edit multiple items within a list, select the check boxes to the left of the items in the list.



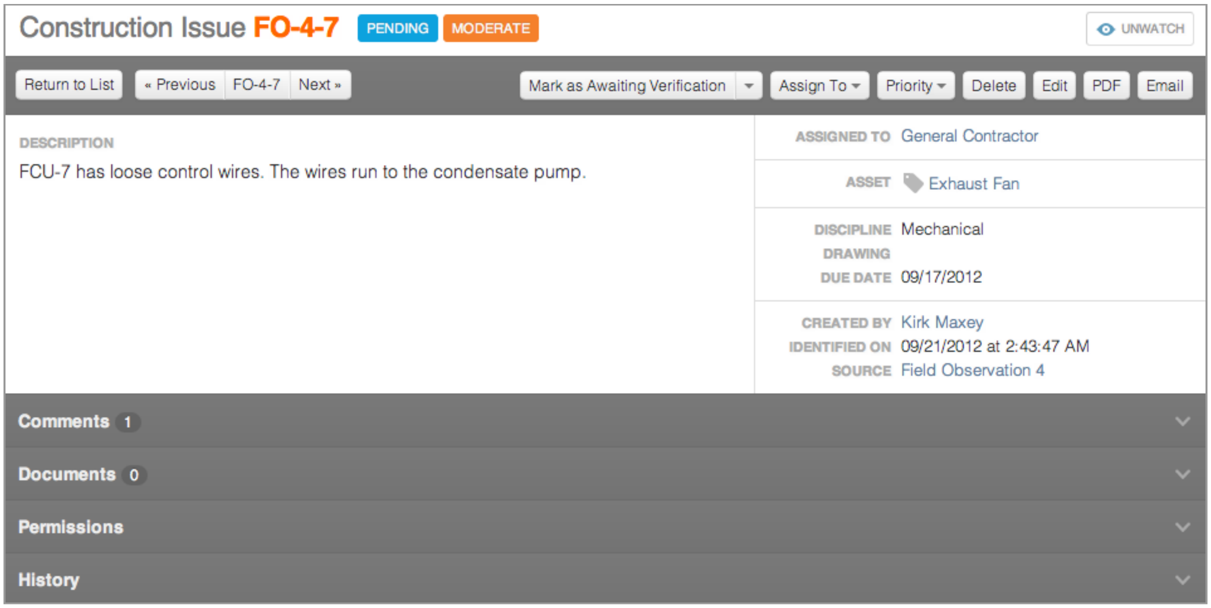
A box will appear at the top with options to edit, duplicate, delete, and if applicable, section-specific actions will also appear. This includes system management on the equipment list page, and status management on the issue list page.



Clicking a button will perform the respective action to the selected items.

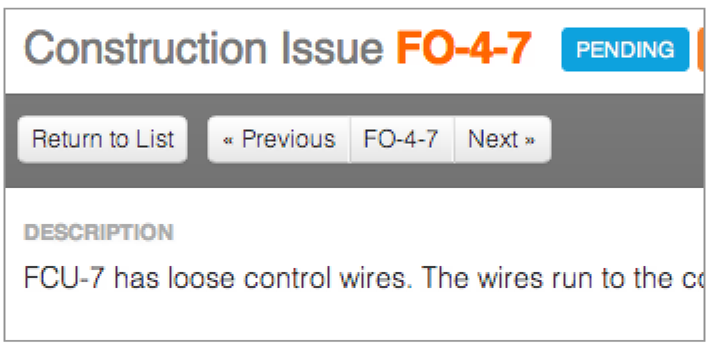
Detailed Views

CxAlloy provides detailed views of various items, including issues, reports, reviews, etc. These views allow users to see more detailed information about specific items and perform additional functions. Each view contains expandable subsections that include Comments, Permissions, History, and Issues. Click on each subsection to expand that section.



Navigating Detail Views

To navigate between views, click either Previous or Next. These will take you to the adjacent records.

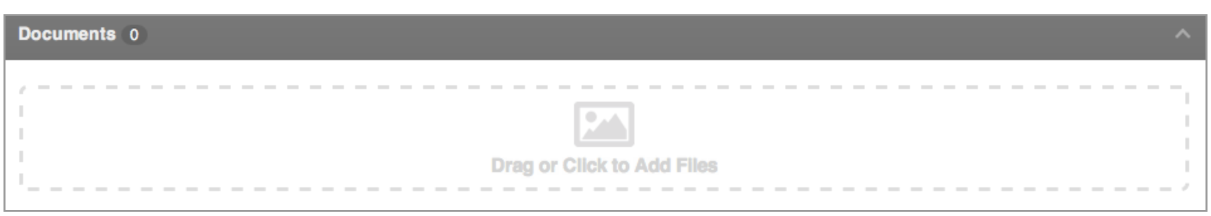


Click the button between Previous or Next to see a drop down list of records. Select one of these records to navigate directly to that specific item.

To return to the list view, click Return to List. All searching and filtering previously performed on the list view will be saved.

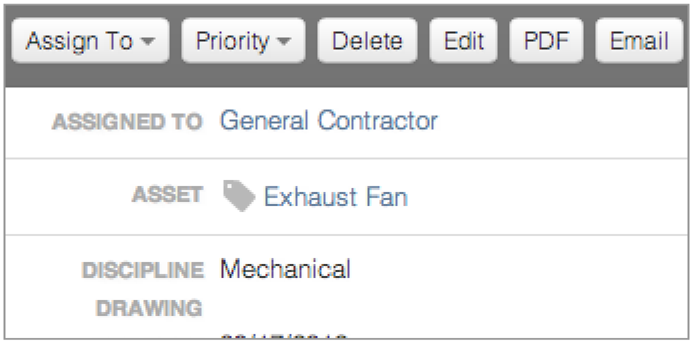
Uploading a Document

Many sections allow the uploading of documents to a specific issue, checklist, equipment, and more. To do this, find and click Upload, located in the Documents section of an item (see Uploading Files for more information.)

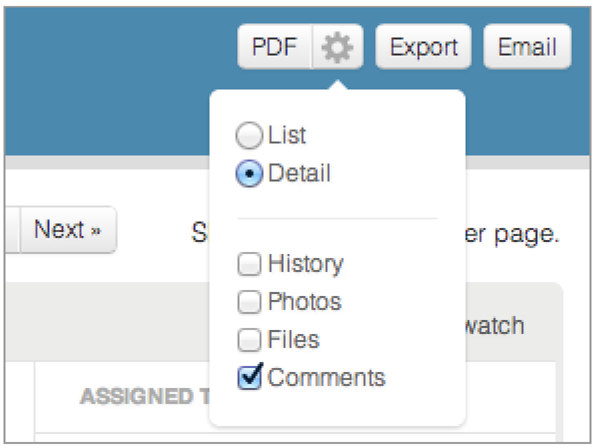


Generating a PDF

For most sections, the option to export a certain page or item's information as a PDF is available. To do this, find and click PDF. Doing this will generate a PDF report file for the user to download to their computer.



In some cases, the PDF button contains multiple options. This is indicated by an options symbol next to the button. Click this symbol to choose various PDF options, such as whether to include photos, files, or other details in the exported file.



Exporting Data

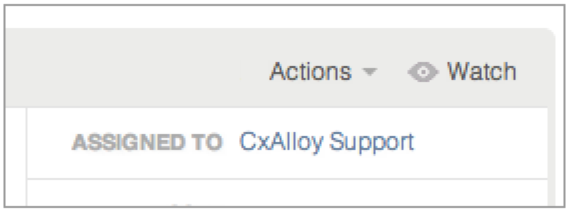
For most sections, the option to export a certain page or item's information as a spreadsheet is available. To do this, find and click Export. Doing this will generate a CSV file for the user to download to their computer.

Emailing Links

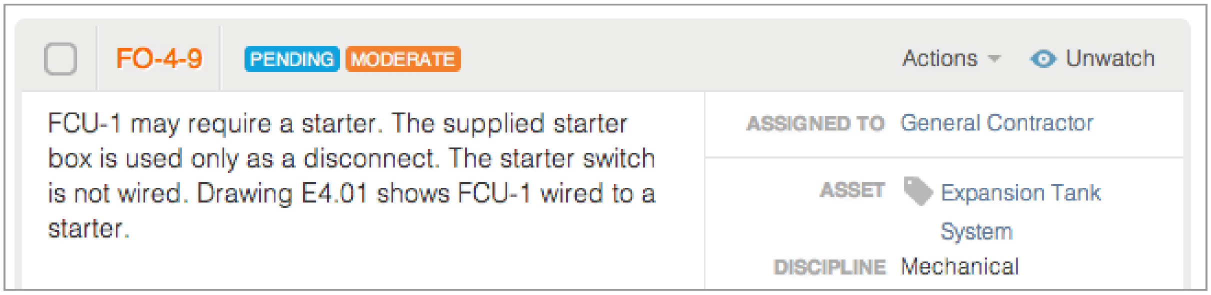
For most sections, the option to email a certain page or item's information as a link is available. To do this, find and click Email. A new window will appear with a link, email text, and a search box for project users. Select the users from the list or search for their name in the search box. You can also type a custom message to appear in the email. Click Send when you are finished.

Watching Items

All items have the ability to be watched, which is your way of tagging items of interest. These may include equipment, issues, checklists, tests, etc. To add an item to your watched list, click Watch next to the item. The item will now appear in your Watched Items on the Home Page.



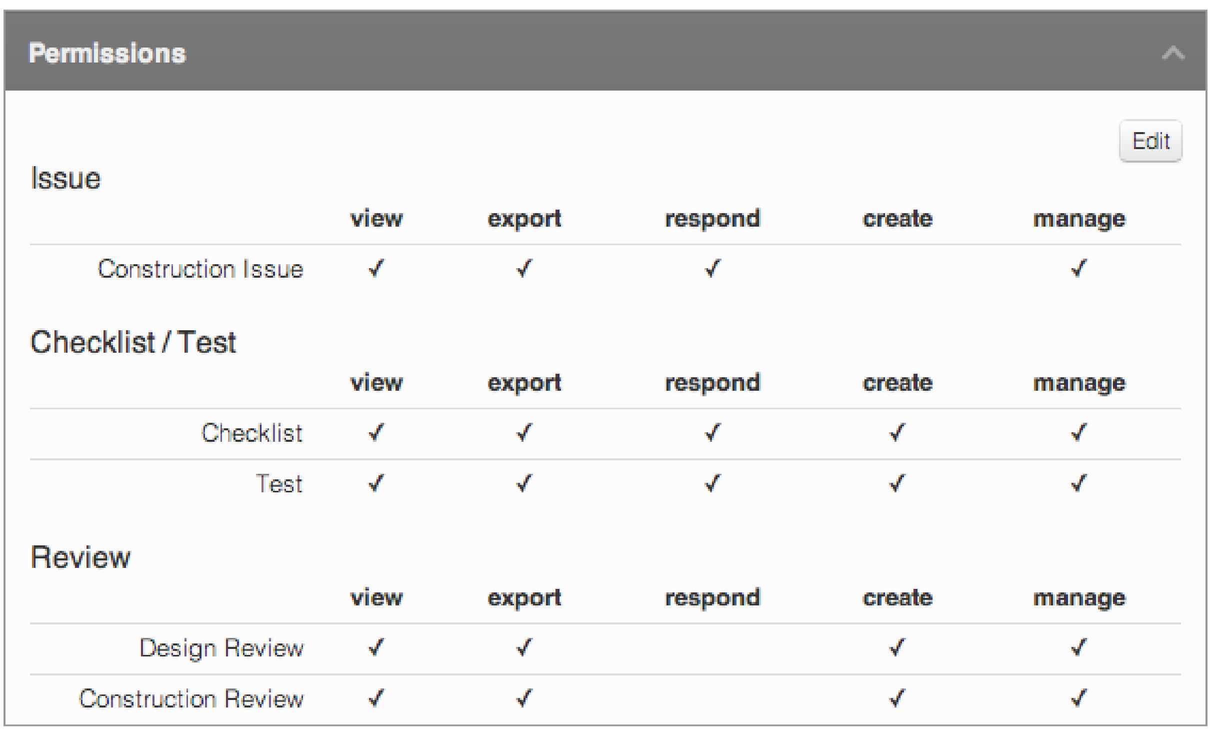
To remove an item from the watched list, click UnWatch.



Item Permissions

CxAlloy provides multiple layers of permissions and controls to keep all project data secure, yet visible to the appropriate team members. Accounts can be configured to allow or deny access at the major section level or specific item level. This is managed through a combination of user permissions and item permissions.

User permissions are configured in the People section. This gives users edit, view, or management level access to major sections within CxAlloy. To learn about user permissions, see Adding People to a Project.



Item permissions are configured on each item. This allows users to be invited or added to the access list for additional privileges on this specific item.

To add a user to an item permission, Click Add in the Permissions section. Choose a person, company, or role to add to the item. Multiple entries can be added. You can notify them via email by clicking the notify checkbox at the bottom left. Click Share to save your update.

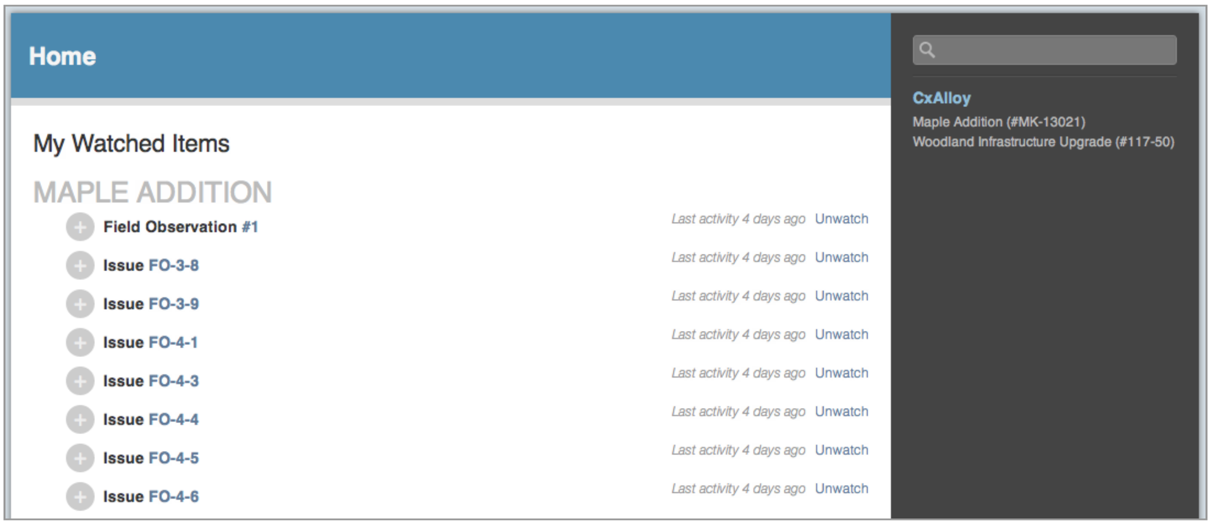
Item permissions are helpful when collaborating on draft reports or completing reviews as a team. You can give editor access to your group and collaborate uninhibitedly.

Item History

Changes in statuses and user assignments can be found in the History section of item detail views. The user who implemented the change, the time, and the details of the change are listed. These activities are also located in the activity section, under the Project tab.

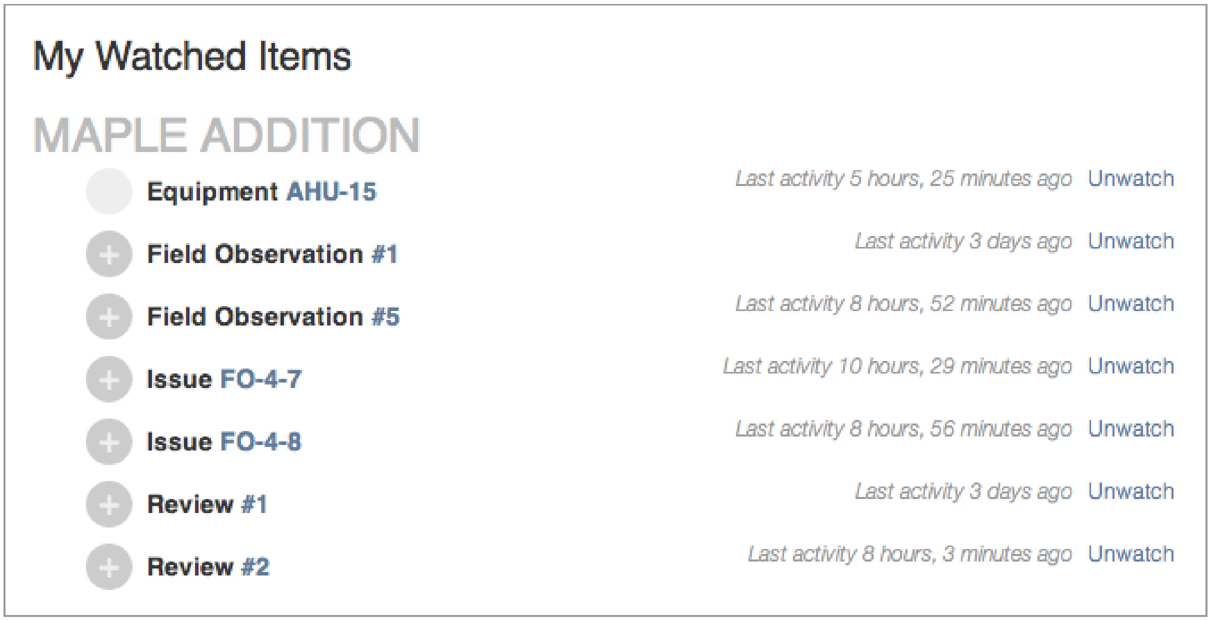
Overview

The Home page is your personal page for important items. This includes watched items, items assigned to you, and a list of all your active projects. You can access your projects by clicking the project name on the righthand side of the page. If your project is inactive or you do not see it in the list, click View All to see a complete list of all projects in your account. From here you can see additional project information and perform a detailed search.



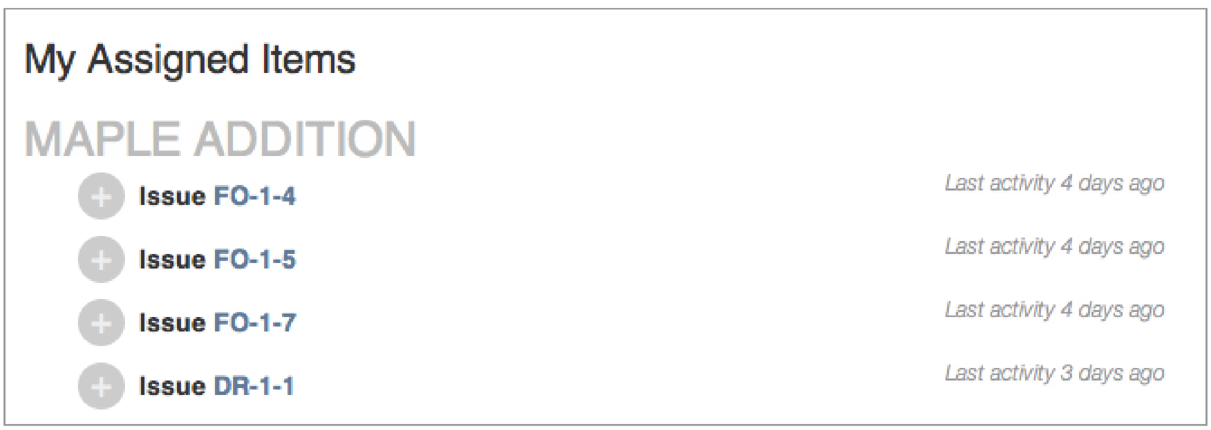
My Watched Items

This section contains all items across your projects that are included in your Watched List. The Watched List is your way of tagging items of interest. These may include equipment, issues, checklists, tests, etc. Any changes made to these items will be displayed here. Click any item to navigate to that specific project item.



My Assigned Items

This section contains all items across your projects that have been assigned to you. Use this list to keep up with all required tasks.

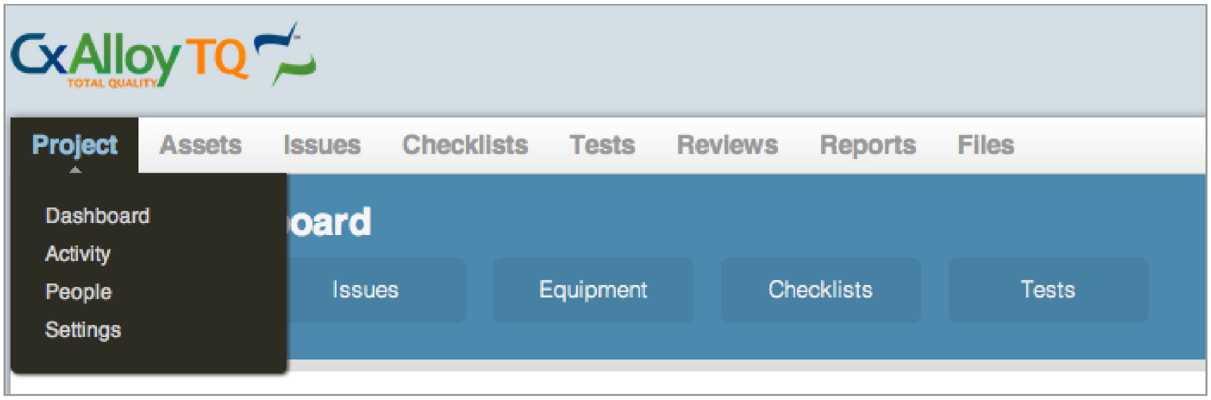


Creating A New Project

You can create a new project from the Home page if you have access to do so. To create a new project, click New Project located just above the project list. Fill out the form and click Create Project. Your new project will be created and you will be redirected to the summary page of your new project.

Project Overview

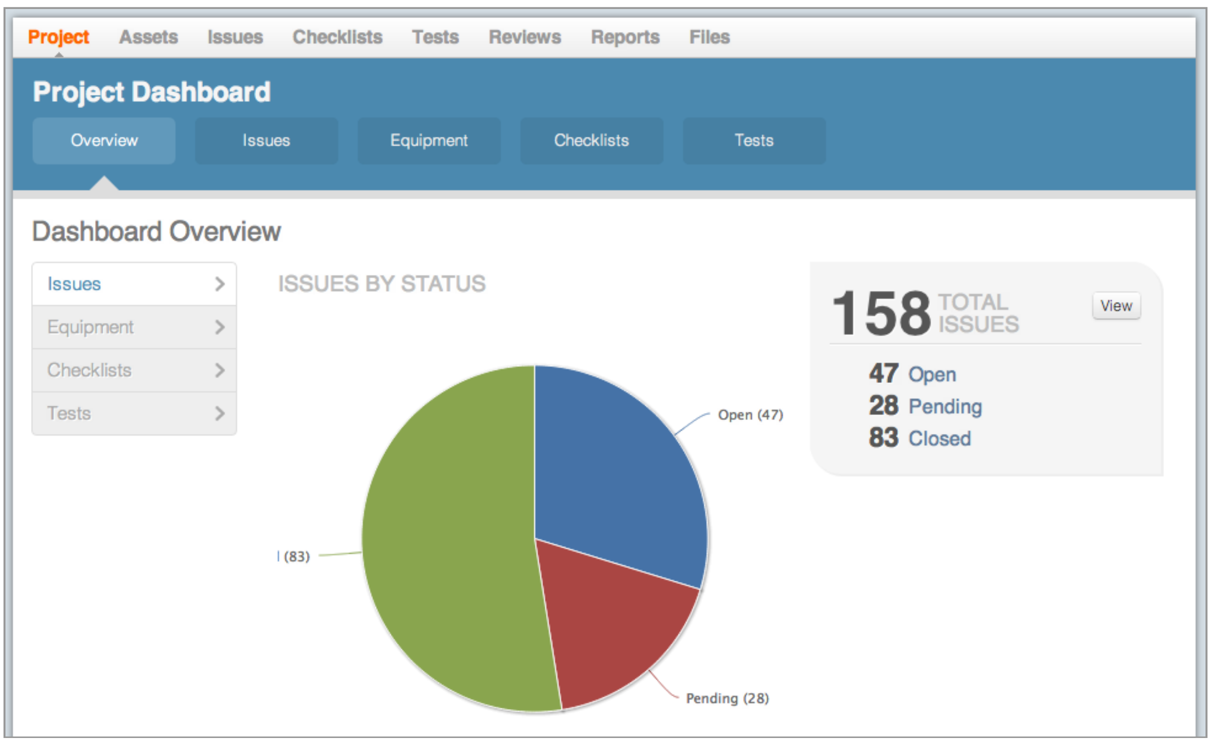
The Project section displays the overall information for a project and lets you manage the people and settings associated to a project.



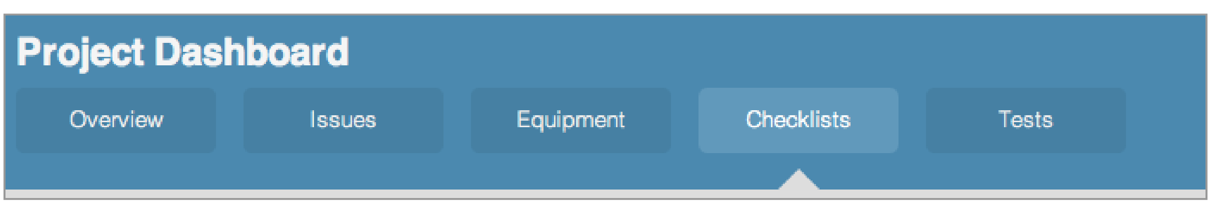
Under the Project tab are four sections. These are Dashboard, Activity, People, and Settings.

Project Dashboard

When you select a project form your home page, you will be brought to the Project Dashboard for the chosen project. The Project Dashboard gives you an instant overview of project information, such as equipment, issues, checklists, and tests.



Click the buttons to the left or above the graphs to see specific item information. The graphs will update based on your selection. Clicking the graphs will take you to the related page displaying just those items.



You can also click the links in the related tables to display that information.

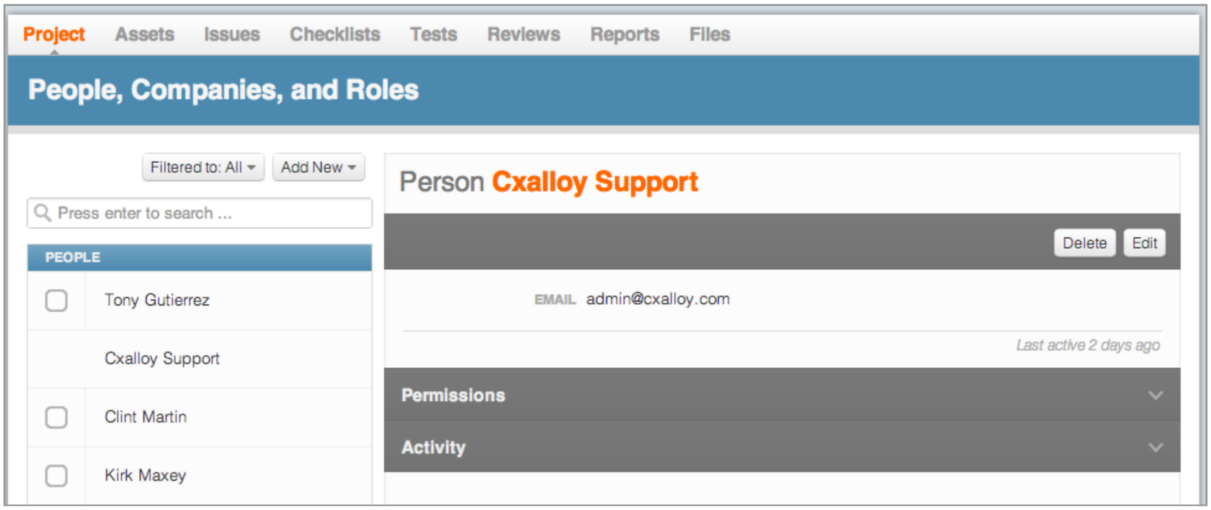
Project Activity

You can see all project activity organized by date. To adjust the date, click the forward or back arrows. The page activity content will adjust accordingly.

You can also filter the activity by clicking the appropriate filters on the lefthand side. The filters include the types of actions, action sources, and the people involved in those actions.

Project People

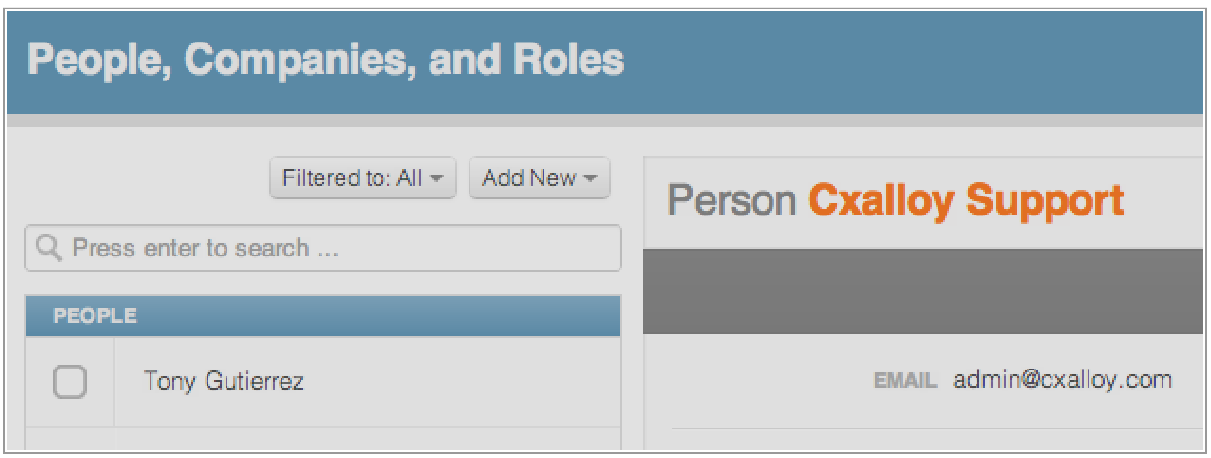
The project people section is located under the Project tab.



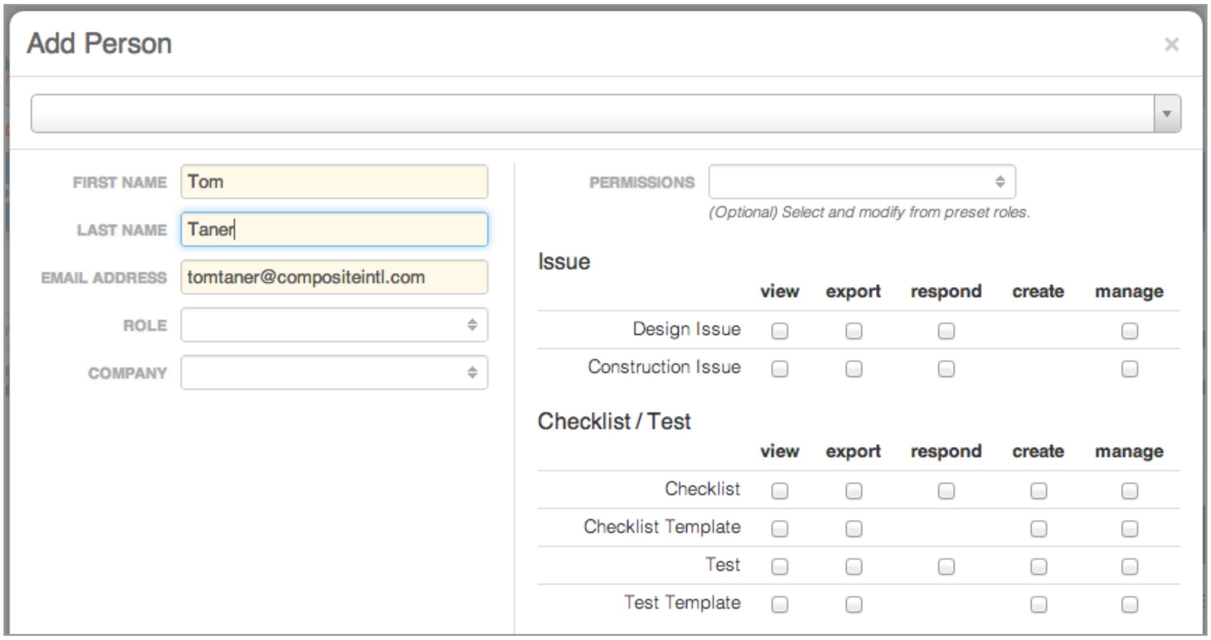
This section shows all people connected to the project and their roles. Here, a user with appropriate access may add new people to the project, or edit existing people. A list of people, companies, and roles are located on the lefthand side. The details for the selected item are located on the right.

Adding People to a Project

To add new users, click Add New above the user list and select Person. Type in the person's name and email address. If known, select their project role and company.



Finally, select their permissions level. You can use one of the default permissions roles or build a custom set of permissions. For each section you have the following options: View, Export, Respond, Create, and Manage.



Please note that you cannot grant permissions beyond your own level.

Editing People Records

To edit people records, select the person on the left. Click Edit in the detail view on the right to change basic information. Click Save when you are finished.

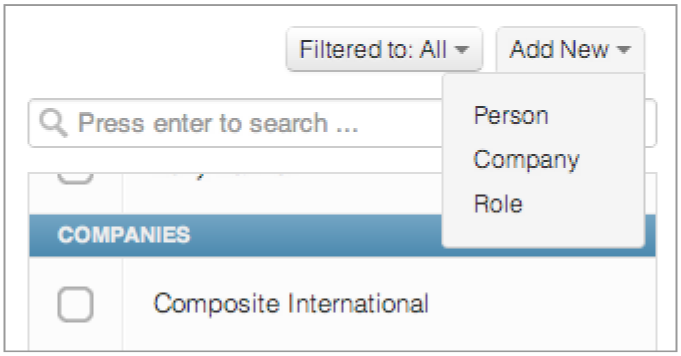
To edit a selected person's permissions, click Edit under the Permissions header on the right. Click Save when you are finished.

CxAlloy TQ

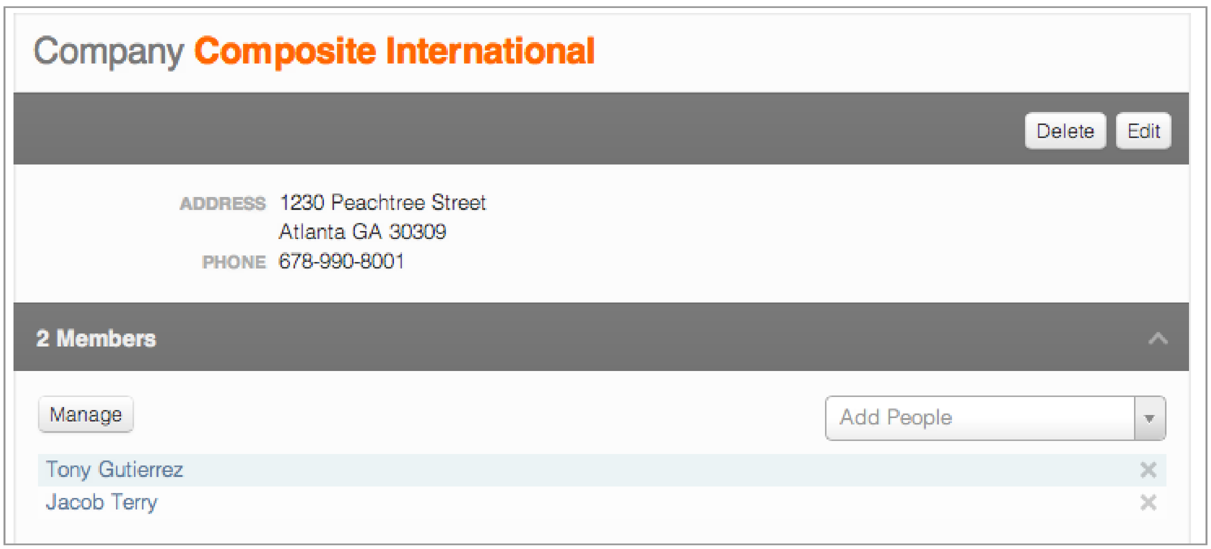
Project Companies and Roles

To add a company or role to a project, click Add New above the user list and select either Company or Role. Type in the appropriate information and click Add.

To edit a selected company or role, click Edit in the detail view on the right to change basic information. Click Save when you are finished.

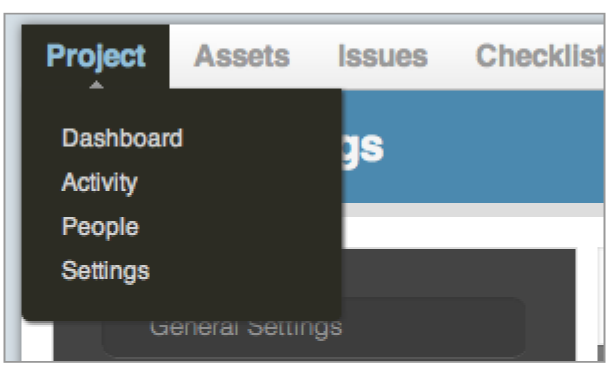


To add people to a selected company or role, click Manage under the Members header. Select the project people in the list on the left. Click Add Selected to add them to the company list. Click Save Connections to keep changes.

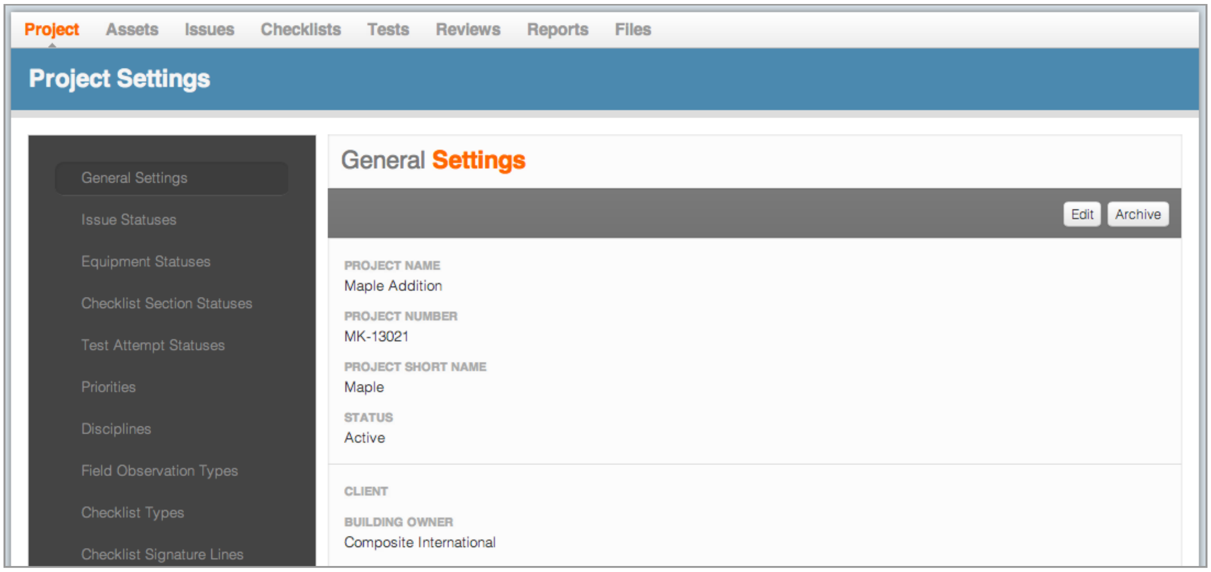


Project Settings

The Project Settings section is located under the Project tab. This is where you can view and update the basic settings for your project.



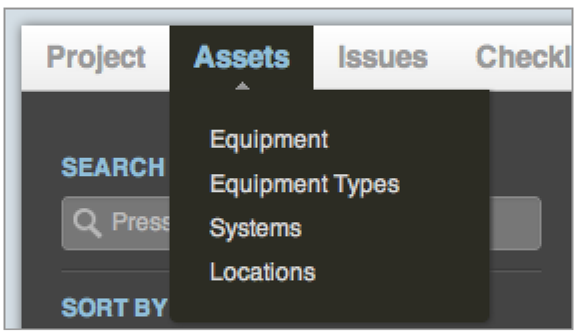
The project settings section displays a detailed view of the project, and can be further edited by a person with administrator access.



Note: Each project is created using the default settings from the account settings section. However, administrators can override those settings on each project.

Assets Overview

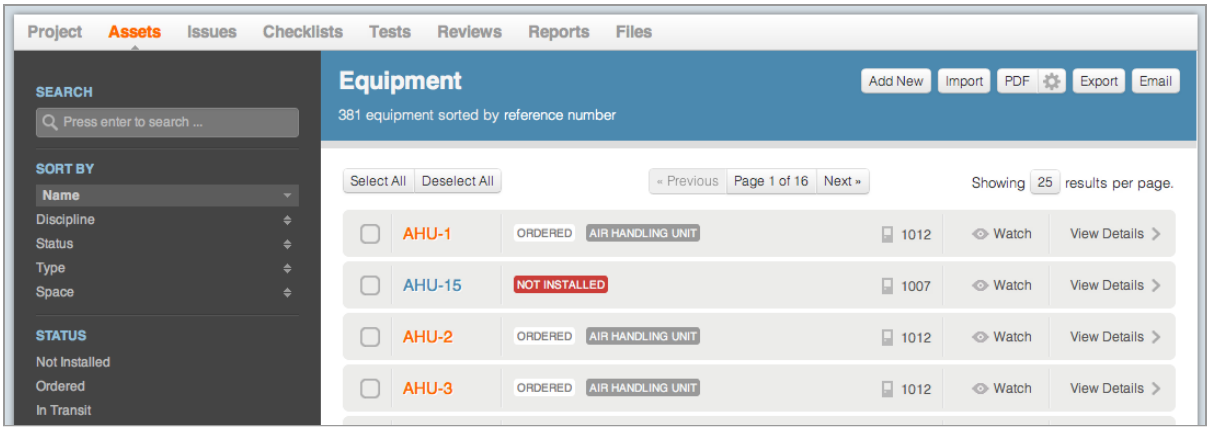
The Assets section is where all your assets can be managed. The ability to add, modify, and delete assets can be found here.



Under the Assets tab are four sections. These include Equipment, Equipment Types, Systems, and Locations. Your assets are related to quality factors throughout your project. For example, an issue may be related to a specific location, an equipment item, or both.

Equipment

The equipment section is where all of your equipment can be seen. It can be accessed from the Assets tab.

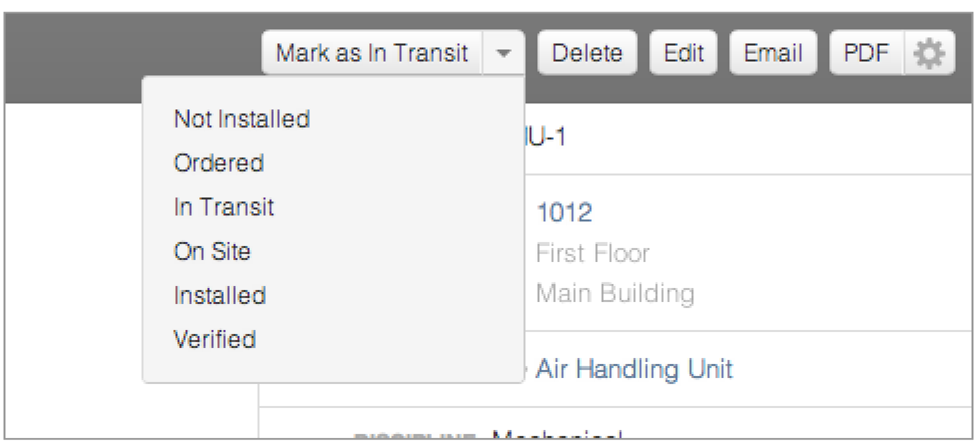


The equipment detail page contains several fields for tracking. These include the equipment type, space, discipline, and related systems. In addition, each equipment item has a list of user-defined attributes. These attributes help define the equipment item. Some attributes include manufacturer, model, serial number, and bar code. Additional attributes are available.

Equipment can have one or more systems associated with it. These allow you to better categorize your equipment into groups and help serve the purpose of identification. To learn how to manage systems, please see Managing Systems.

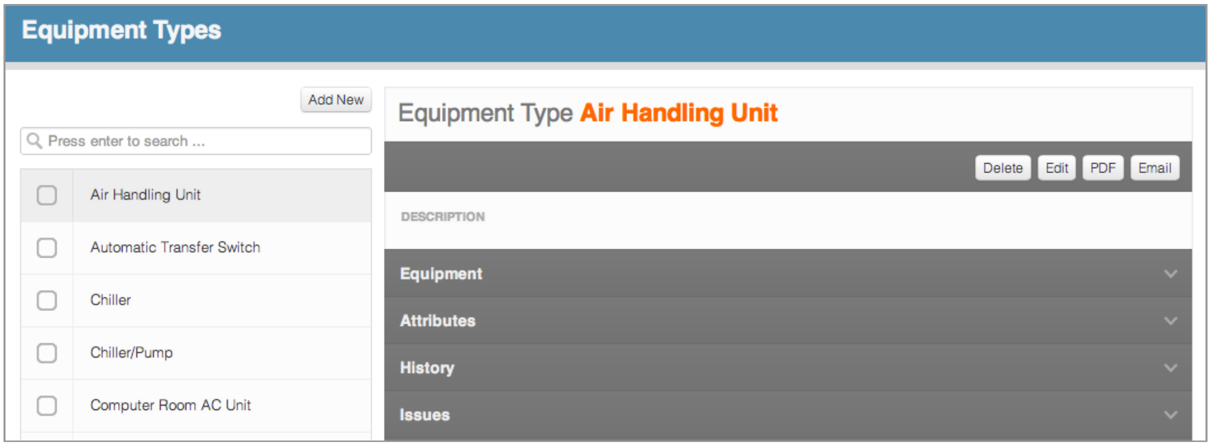
Editing equipment in their specific page gives the extra option to change the equipment name, as compared to editing in the list view.

Each equipment item has the option of assigning a status. The statuses are configured in the project settings. The equipment statuses can be used to track delivery, installation, and startup of all equipment.



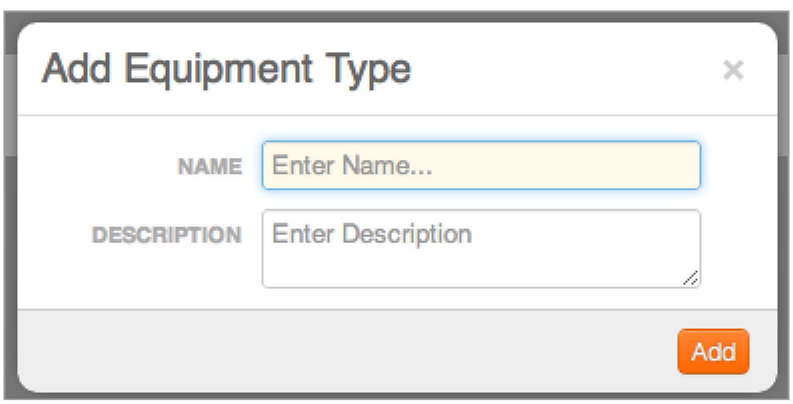
Equipment Types

The Equipment Types section is located under the Assets tab. These types are used in defining equipment items.

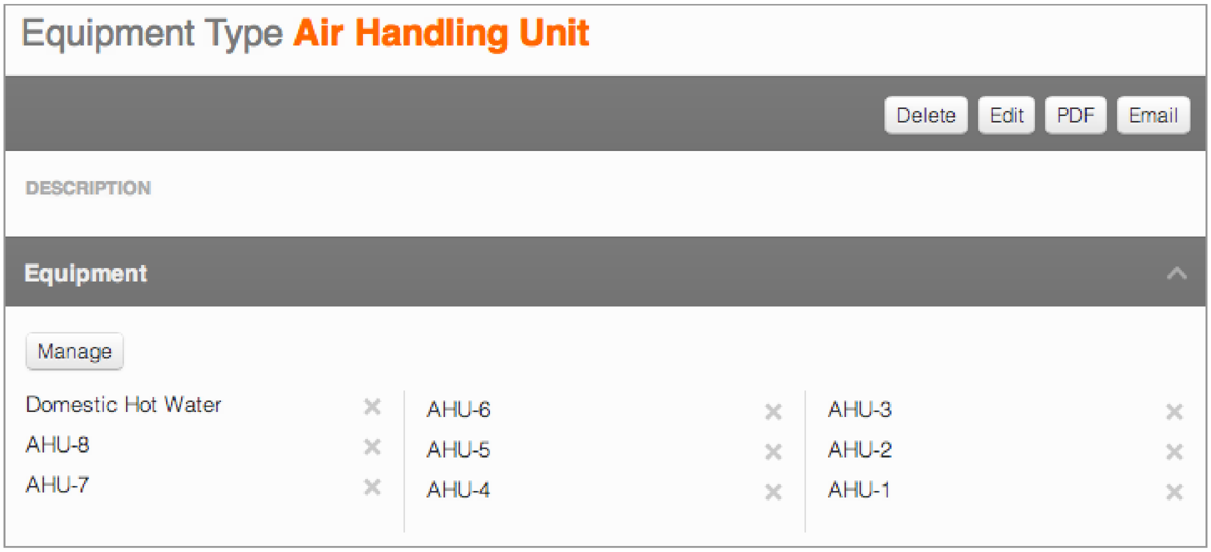


From this section you can view related equipment, attributes, historical activity, and any related issues, checklists, or tests.

To add a new equipment type, click Add New in the equipment type list. Enter the name of the type. You can also enter a description of the type; however, it is not required. Click Add to create a new type.

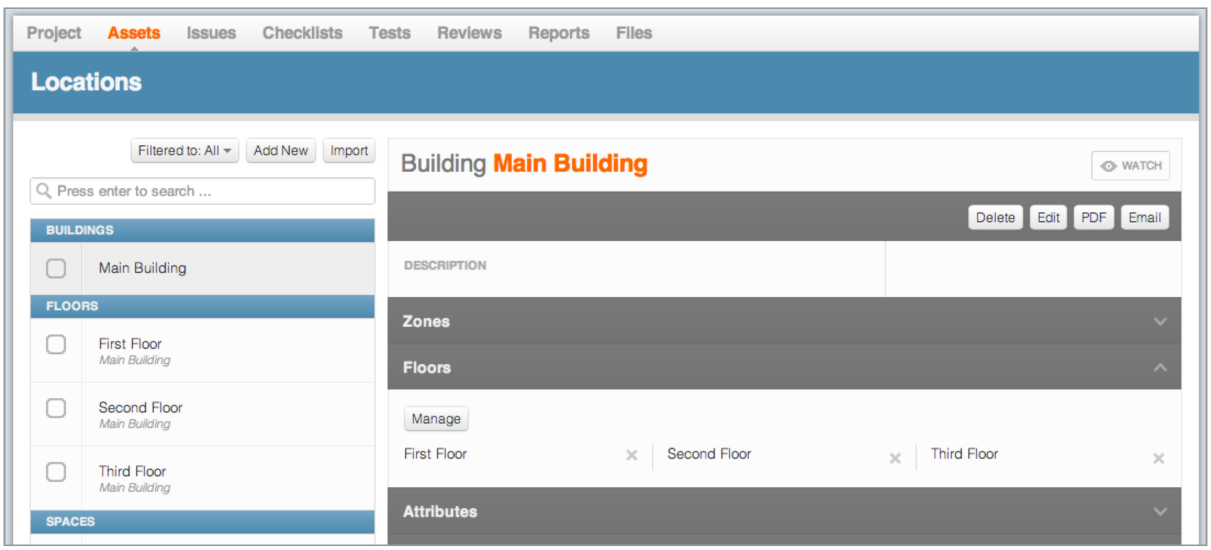


You can add multiple equipment items to the selected Equipment Type by clicking Manage under the equipment header. Select the appropriate equipment from the left and click Add Selected. Click Save Connections to save your updates.



Systems

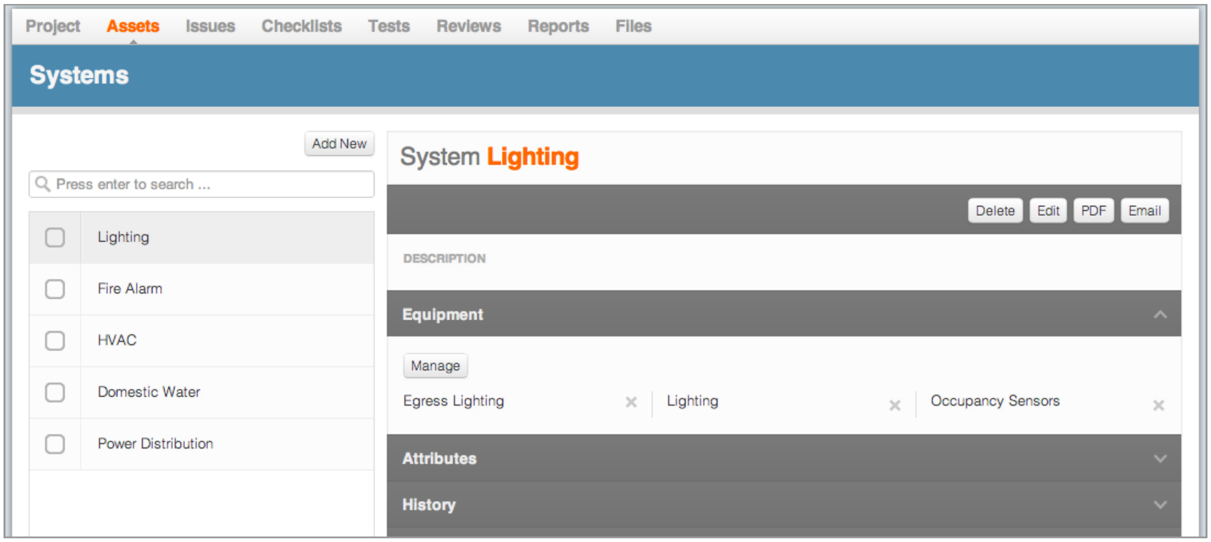
The Systems section is located under the Assets tab. These systems are used in defining equipment items.



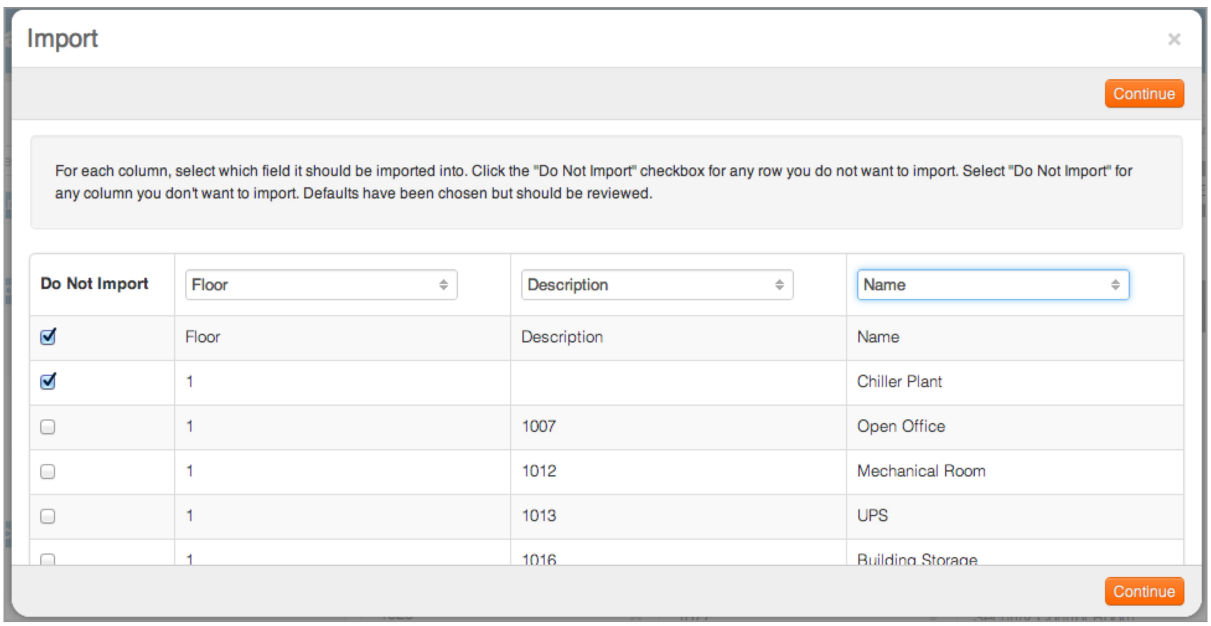
The creation and editing of these systems are similar to that of equipment types. See the Equipment Types section for more information.

Locations

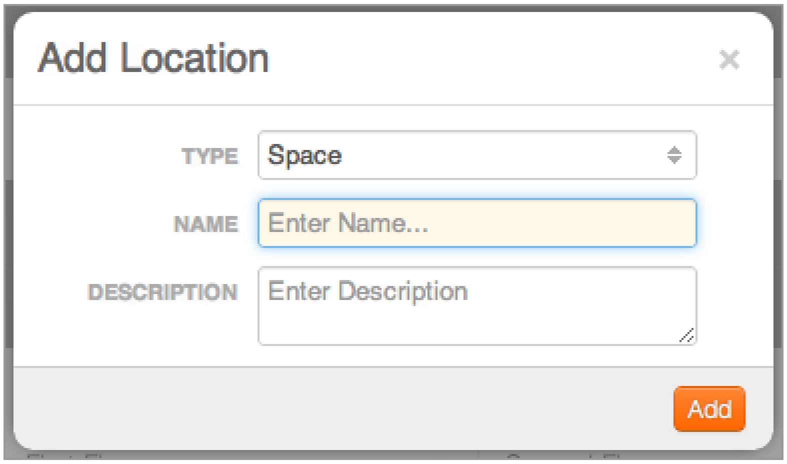
The Locations section is located under the Assets tab. These locations are used to identify buildings, floors, spaces, and zones. From this section you can view related equipment, attributes, historical activity, and any related issues, checklists, or tests.



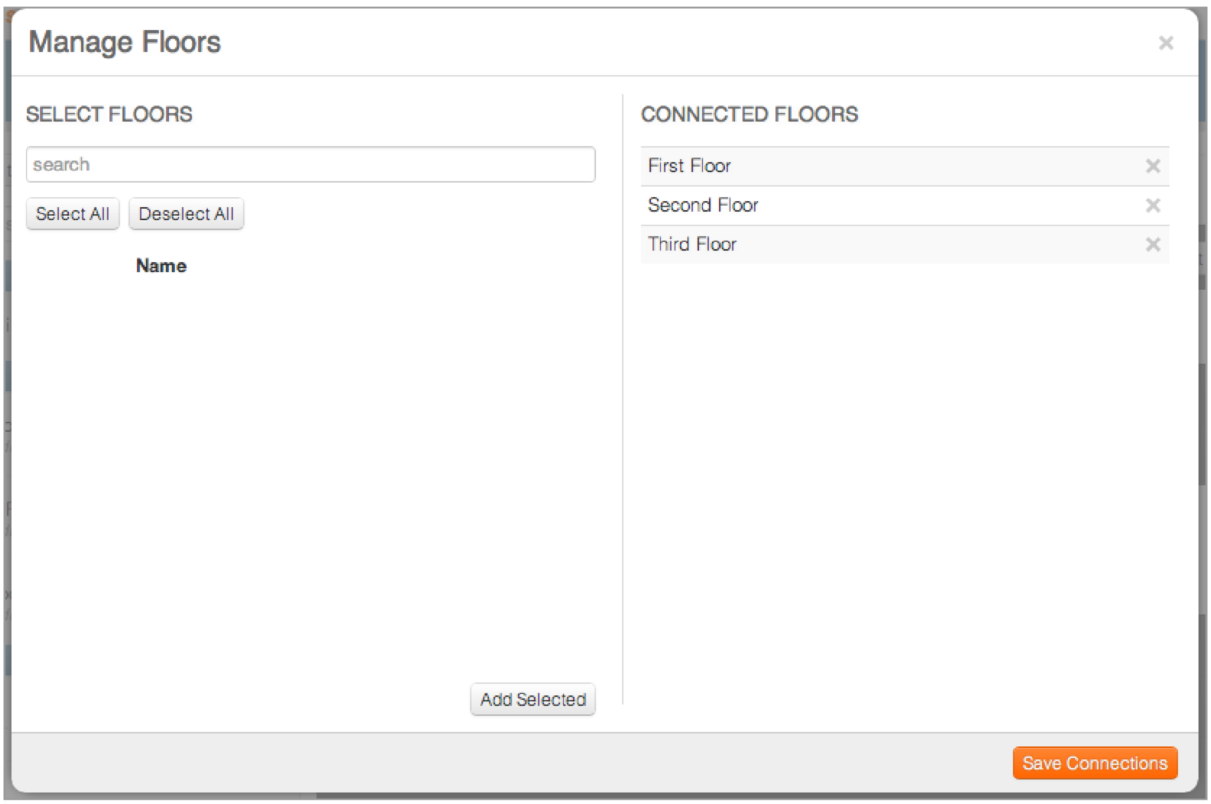
Location information follows the COBie data format and can be imported from BIM models and exported back to BIM models using these spreadsheets. However, CxAlloy TQ does not require each project to strictly follow this method. All location information is optional.



To add a new location, click Add New in the location list. Enter the name of the location and select whether it is a building, floor, space, or zone. You can also enter a description of the location; however, it is not required. Click Add to create a new location.



You can add multiple location items to the selected location by clicking Manage under the appropriate header. For selected buildings, you can manage zones or floors. For selected floors or zones, you can manage spaces. For selected spaces, you can manage equipment.

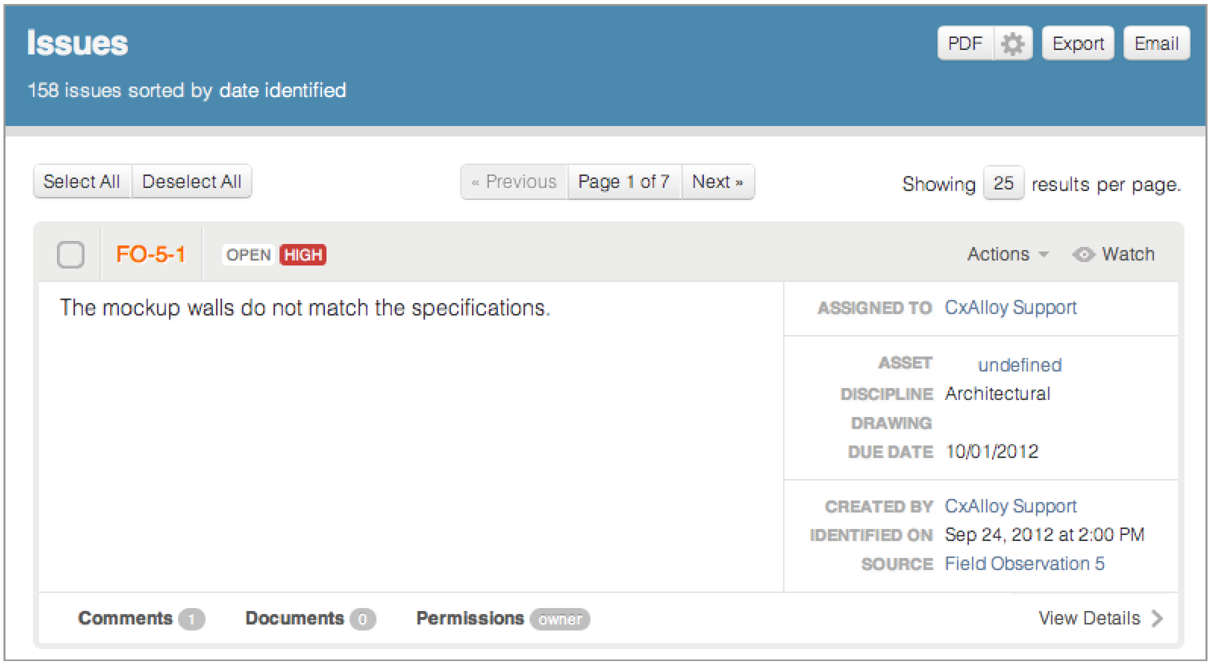


After clicking Manage, select the appropriate location item from the left and click Add Selected. Click Save Connections to save your updates.

Overview

CxAlloy TQ allows you to effectively collaborate on design issues and construction issues. These issues are typically generated from one of many sources, such as reviews, observations, tests, etc. An issue may be a deficiency, question, or a comment. Each issue is fully tracked with all historical activity serving as project record. Every issue will have a unique identifier, description, and status.

Under the Issues Tab are Design Issues, Construction Issues, All Issues, My Design Issue, My Construction Issues and My Issues.

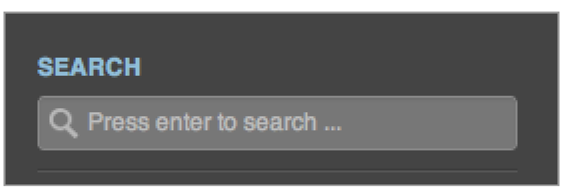


- **Design Issues** contains all issues related to the Design Phase.
- **Construction Issues** contains all issues related to the Construction Phase.
- **All Issues** contains both Design and Construction Issues.
- **My Design Issues** contains design issues assigned to you.
- **My Construction** Issues contains construction issues assigned to you.
- **My Issues** contains both design and construction issues assigned to you.

At the Design Issues Page, you can view an issue, edit an issue, and respond to issues for design review. Likewise, at the Construction Issues Page, you can view an issue, edit an issue, and respond to an issue for construction phase that includes issues found from construction reviews, checklists, field observations, and tests.

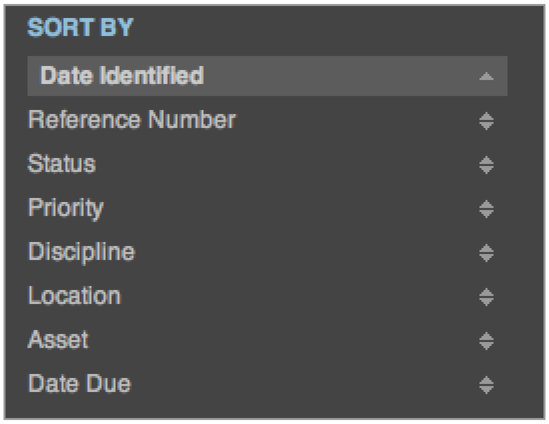
Filtering And Searching For Issues

In order for you to be more productive, you can filter and search for issues. When you click on the Issues tab, all of the issues are listed on the right, and the Filter and Search boxes are located to the left. You can filter by Status, Priority, Discipline, Assigned To, Location, Asset, and Date Identified. Simply select which filters you want to use, and CxAlloy TQ allows you to filter the issues, getting you to the issue faster. To search for issues, enter your query in the search bar and click Search.



Sorting Issues

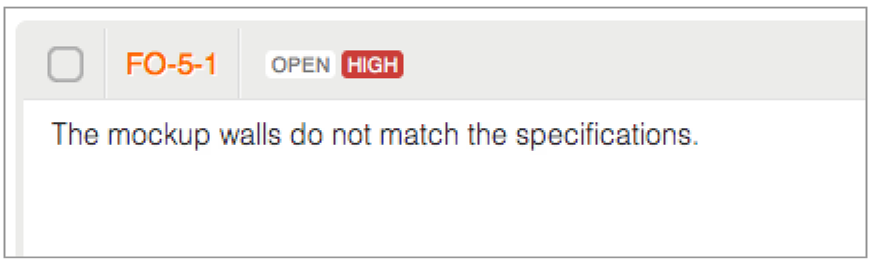
Under the Search box is a section labeled “Sort By”. To sort issues, select from the list, you can sort by Date Identified, Reference Number, Status, Priority, Discipline, Location, Asset and Date Due.



Viewing Issue Details

Each issue has both a compact view and a detailed view. The Issues list displays issues in the compact view. The compact view can be expanded to show additional information, such as Comments, Documents, and Permissions.

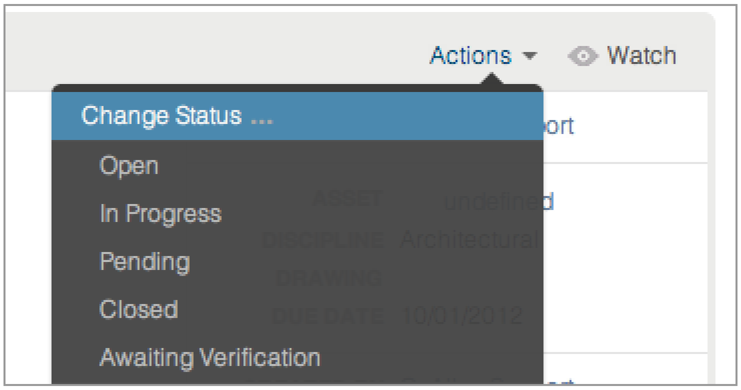
To see these sections, click the section name. That section will expand beneath the compact view to reveal any related information.



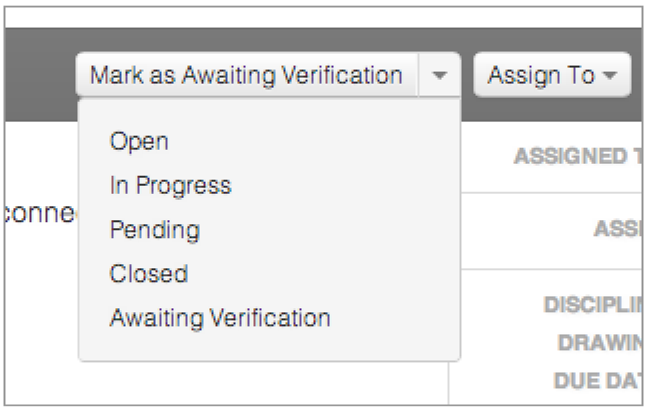
To see the full detailed view of an issue, click View Details at the bottom right of the issue box.

Issue Statuses

The typical flow of an issue will start as being opened and assigned to a user. Once the user has resolved the issue, he or she will mark it as complete, but with some indication of needing approval. By default, this is called Pending. However, account settings can be configured to provide other statuses. Once confirmed, the originator of the issue, or someone with proper permissions, can then mark it as complete to conclude the issue. By default, this is called Closed. For incomplete issues, the ability to change the current status is available.



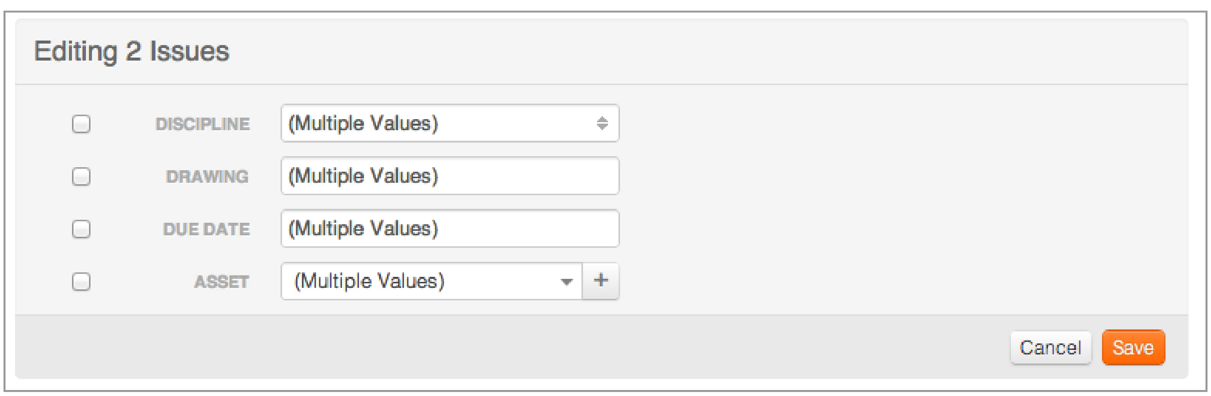
The main status button will display the next status in turn for the issue, but the arrow allows you to set the issue status to any of the authorized issue statuses from a drop down menu. Issue statuses can be access controlled in the settings section.



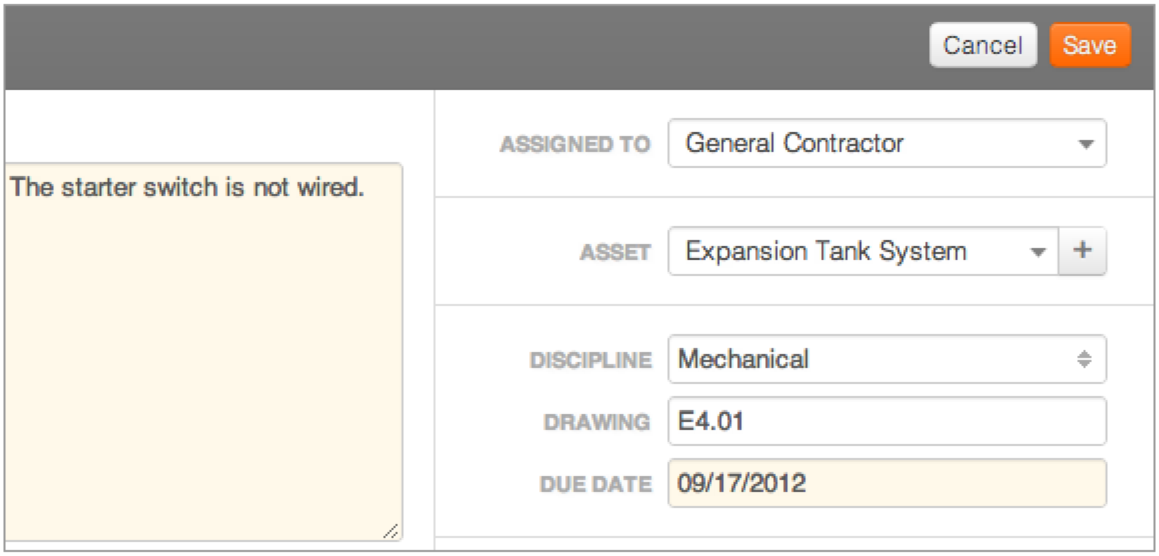
Note: Editing multiple issue statuses is also available from the issue list view.

Editing Issues

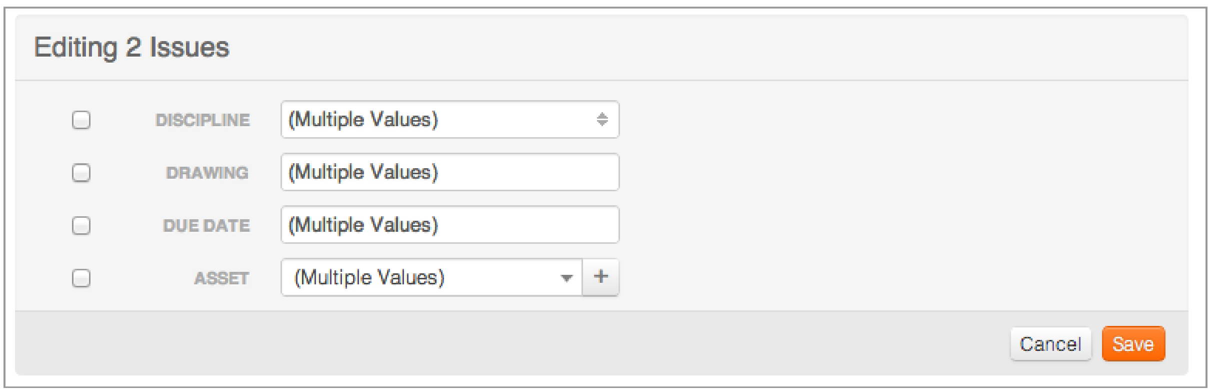
You can edit issues in several ways. To edit issues from the list page, click the checkbox next to the issue or group of issues to be edited. The issue edit bar will appear above your issue list. Click Edit at the top left to display edit options. You can change the discipline, drawing, due date, or asset. Click Save to save your changes.



To edit issues from the issue detail page, go to the issue detailed view by clicking View Details. Next click Edit at the top right. You can change the description, asset, and other various fields. Click Save to save your changes.



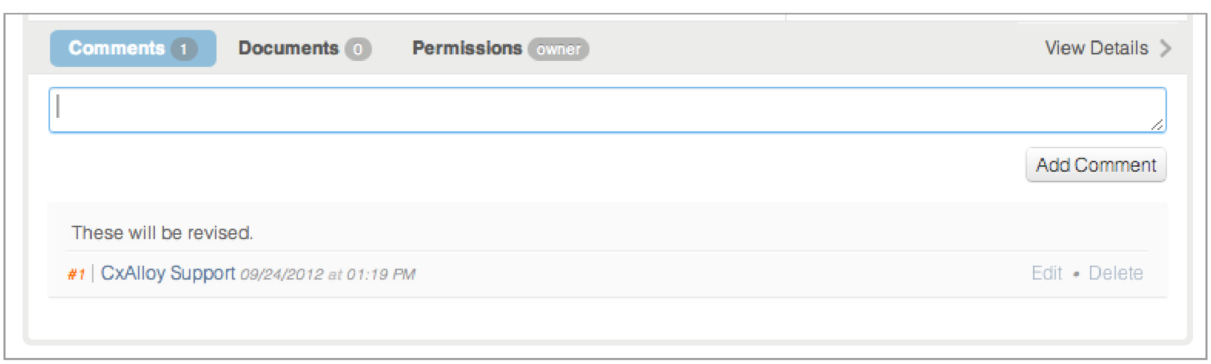
The editing option will apply to all selected issues. If the selected issues have different values for the edit options, “Multiple Values” will display in the edit field. Any saved changes will overwrite these values.



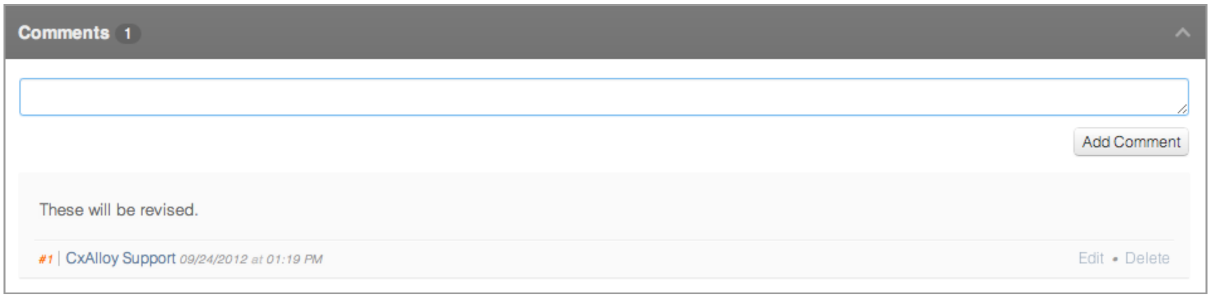
Responding to Issues

There are two methods for responding to an issue. You can respond to issues in the Issue List or you can respond to an individual issue on the Issue Detail Page.

To respond to an issue in the issue list, click Comments at the bottom left of the issue box. A text box and existing comments will drop down below. Enter your comment into the text box and click Add Comment to save your comment.

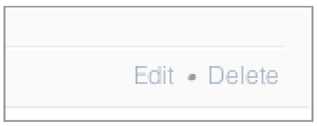


To respond to an individual issue in the issue detail page, go to the issue detailed view by clicking View Details. Next click the comments bar in dark gray below the description. A text box and existing comments will drop down below. Enter your comment into the text box and click Add Comment to save your comment.



Editing an Issue Comment

Existing comments can be edited or deleted. To perform these actions, expand the comment either from the issue list or detail view. Click either Edit or Delete next to the comment. Enter your changes to the comment and click save or press Enter from your keyboard.

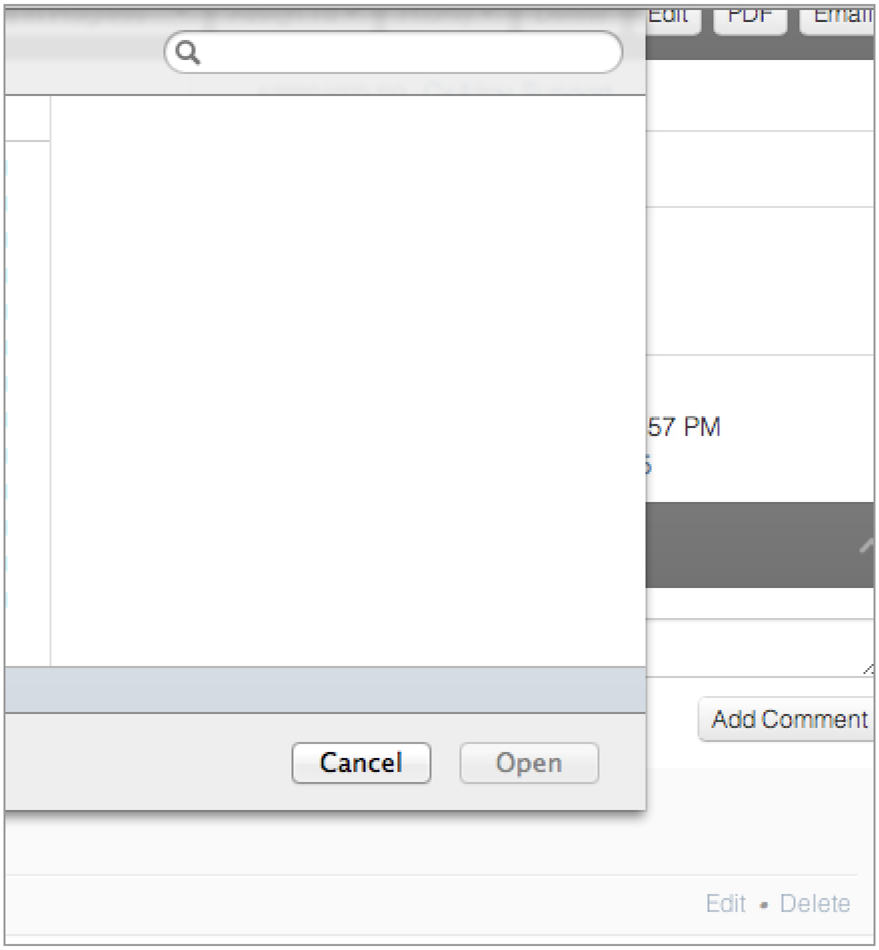


Uploading Images or Files to an Issue

There are two methods for uploading images or files to an issue. You can drag images from your computer or choose them from a file select box.

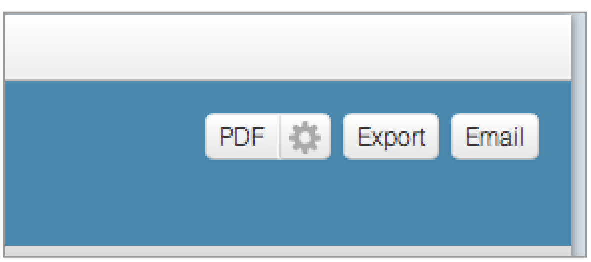
To use the document drag-and-drop feature, select a file on your computer. Next, drag the file over the desired issue. The issue can be in compact list view or detailed view. Release the file, and a file upload box will appear. CxAlloy will generate automatic thumbnails of pictures to be used in prints.

To use the traditional file upload method, click the Documents section in the issue record to expand it. Click inside the dashed document window to see the file select window. Select the file from your computer and click Open.

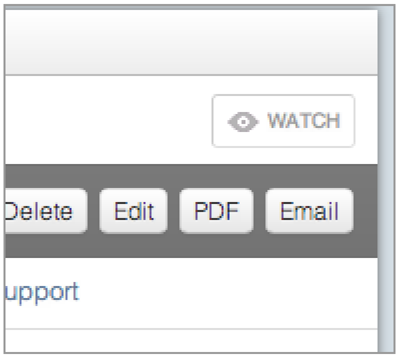


Printing Issues

To print multiple issues click PDF located at the top of the issues list. The PDF list of issues will contain only the issues found currently in your list. In addition, any sorting options you have selected will be displayed in your file.



You can print single issues by clicking PDF on the issue detail view.



To learn more about print options, see Exporting a PDF.

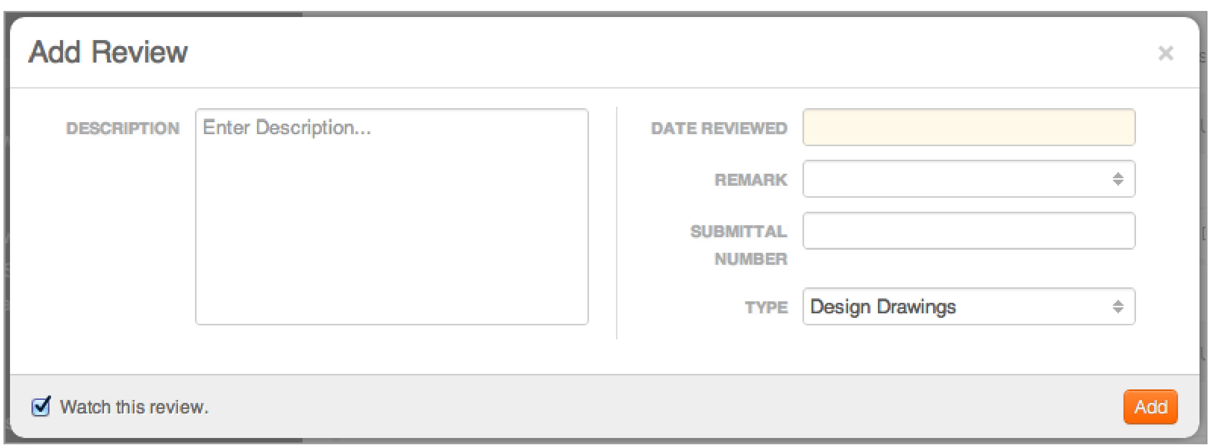
Overview

CxAlloy TQ allows users to easily create, manage, and collaborate on design reviews and issues identified during the design phase of a project. These reviews can be generated by different project roles, such as architects, engineers and other consultants. Each review contains a description of the reviewed document, along with any issues or comments. To access all design reviews, click Design Reviews, located under the Reviews tab.

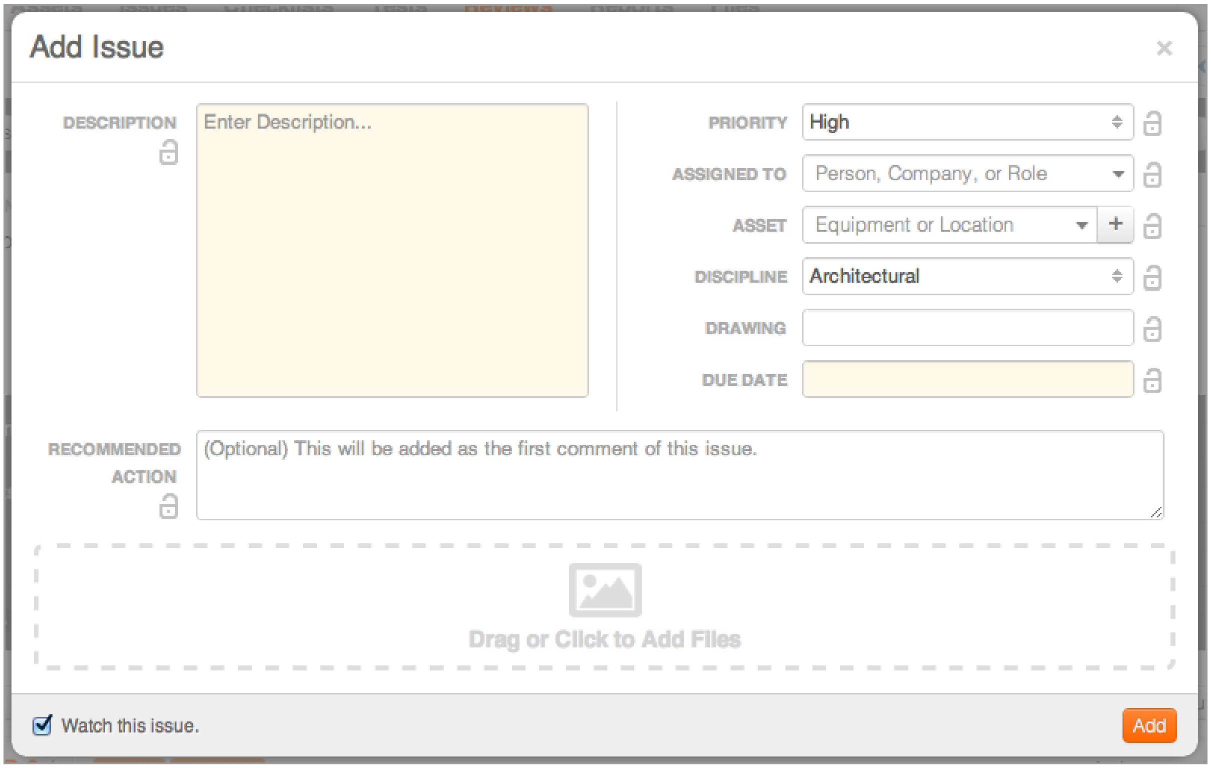
Creating a Design Review

You can create a new design review by clicking Add New on the Design Reviews page.

In the new window, complete the review fields including description, date, and remark. Click Add to create the review. A review with no issues will be created with Draft status.



To add issues to the review, click Add Issues. A new issue window will appear with various fields to complete. Enter the issue information into the text boxes and click Save to create the new issue. Repeat this process to add additional issues to the review.



When you are finished with the review, click Publish. This will change the status to Published and will allow other team members to see your review.

Sharing a Design Review

Design reviews can be shared in multiple ways. You can print out a PDF of the review and email to your team. To print a PDF, see Generating a PDF.

To email a link to your review, see Emailing Links.

Note: all assignments from the review will be sent to the appropriate users. In addition, these will be found in the user's Home page. However, it is still a good practice to notify your team of any new review via the email link.

Resolving Issues from a Design Review

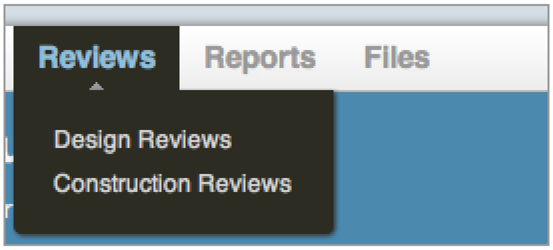
All issues in a published design review are located in both the review itself and in the Design Issues section. Issues can be managed from either location.

To respond and close an issue from a review, simply click the review from the list and navigate to the specific issue. To add a response to the issue, see Responding to Issues. To update the status of the issue, see Issue Statuses.

Overview

CxAlloy TQ allows users to easily create, manage, and collaborate on construction reviews and issues identified during the construction phase of a project. These reviews can be generated by different project roles, such as architects, engineers, contractors, and other consultants. Reviews may include equipment submittals, maintenance manuals, test reports, or other various documents submitted during the construction phase.

Each review contains a description of the reviewed document, along with any issues or comments. To access all design reviews, click Construction Reviews, located under the Reviews tab.



Creating a Construction Review

You can create a new construction review by clicking Add New on the Construction Reviews page. For more information about creating reviews, see the Design Reviews section.

Sharing a Construction Review

As with design reviews, construction reviews can be shared in multiple ways. For more information about sharing reviews, see the Design Reviews section.

Resolving Issues from a Construction Review

All issues in a published construction review are located in both the review itself and in the Construction Issues section. Issues can be managed from either location. For more information about resolving issues from reviews, see the Design Reviews section.

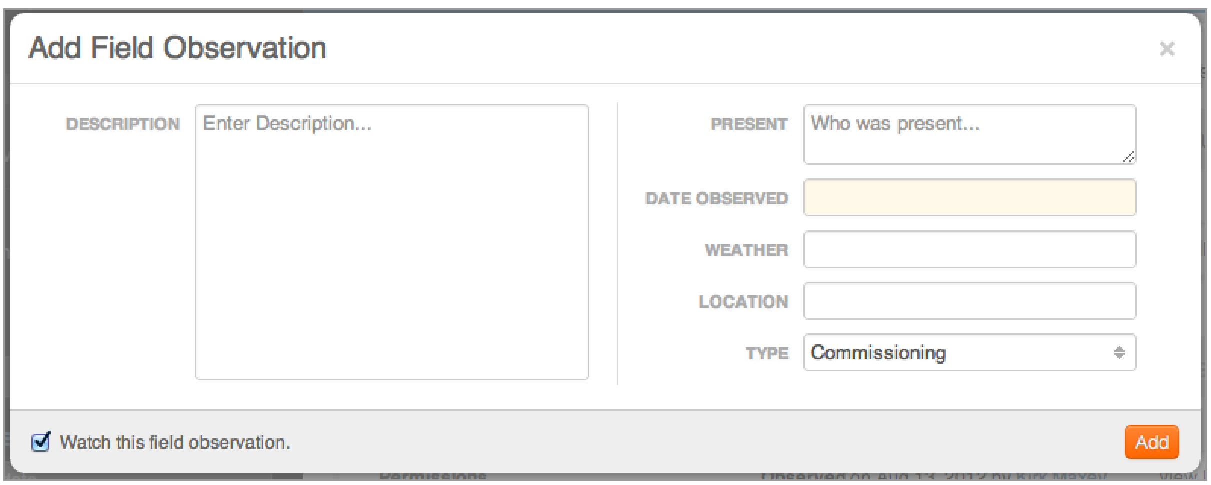
Overview

Field observations provide a way for users to document both observations and comments from the onsite construction activities. These may be used by various project roles, such as architects, engineers and other consultants. Each report contains a description of the observation, general comments, and observed issues. To access all field observations, click Field Observations, located under the Report tab.

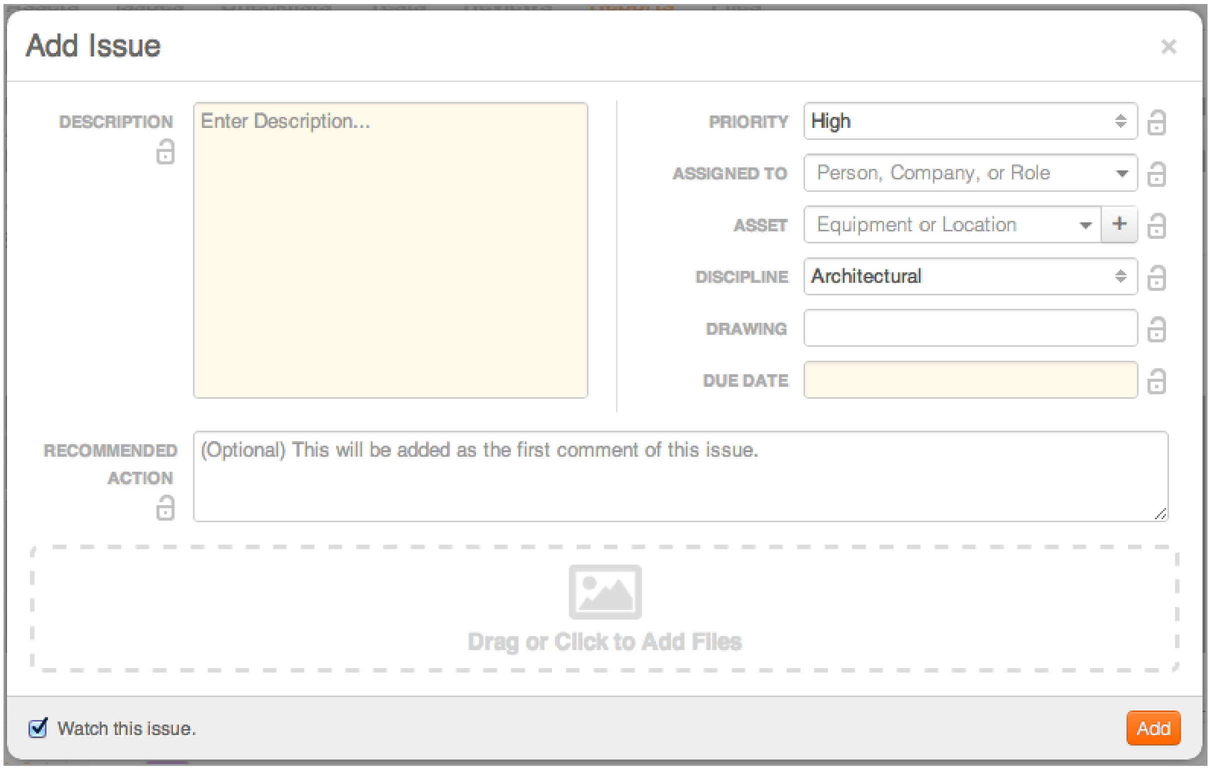
Creating a Field Observation

You can create a new field observation by clicking Add New on the Field Observations page.

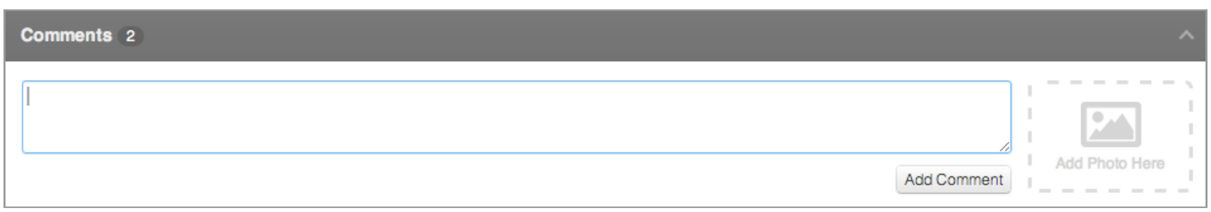
In the new window, complete the observation fields including description, date, and location. Click Add to create the report. A field observation report with no issues will be created with Draft status.



To add issues to the report, click Add Issues. A new issue window will appear with various fields to complete. Enter the issue information into the text boxes and click Save to create the new issue. Repeat this process to add additional issues to the report.



To add general comments to the report, click Comments to expand that section. Enter your comment into the blank field and click Add Comment. To add a picture to the comment, drag a picture file over the comment and release it. Your picture will be added to the specific comment.



When you are finished with the report, click Publish. This will change the status to Published and will allow other team members to see your report.

Sharing a Field Observation

Field Observations can be shared in multiple ways. You can print out a PDF of the report and email to your team. To print a PDF, see Generating a PDF.

To email a link to your report, see Emailing Links.

Note: all issue assignments from the report will be sent to the appropriate users. In addition, these will be found in the user's Home page. However, it is still a good practice to notify your team of any new report via the email link.

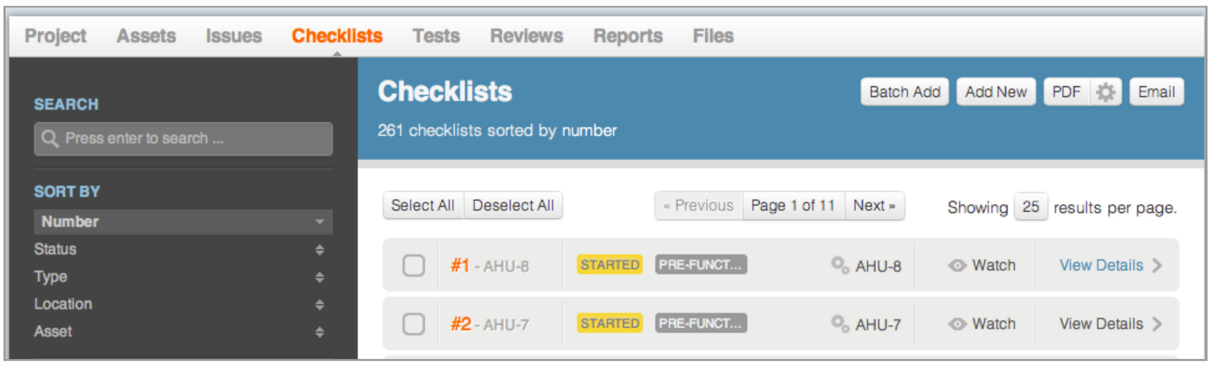
Resolving Issues from a Field Observation

All issues in a published Field Observation are located in both the report itself and in the Construction Issues section. Issues can be managed from either location.

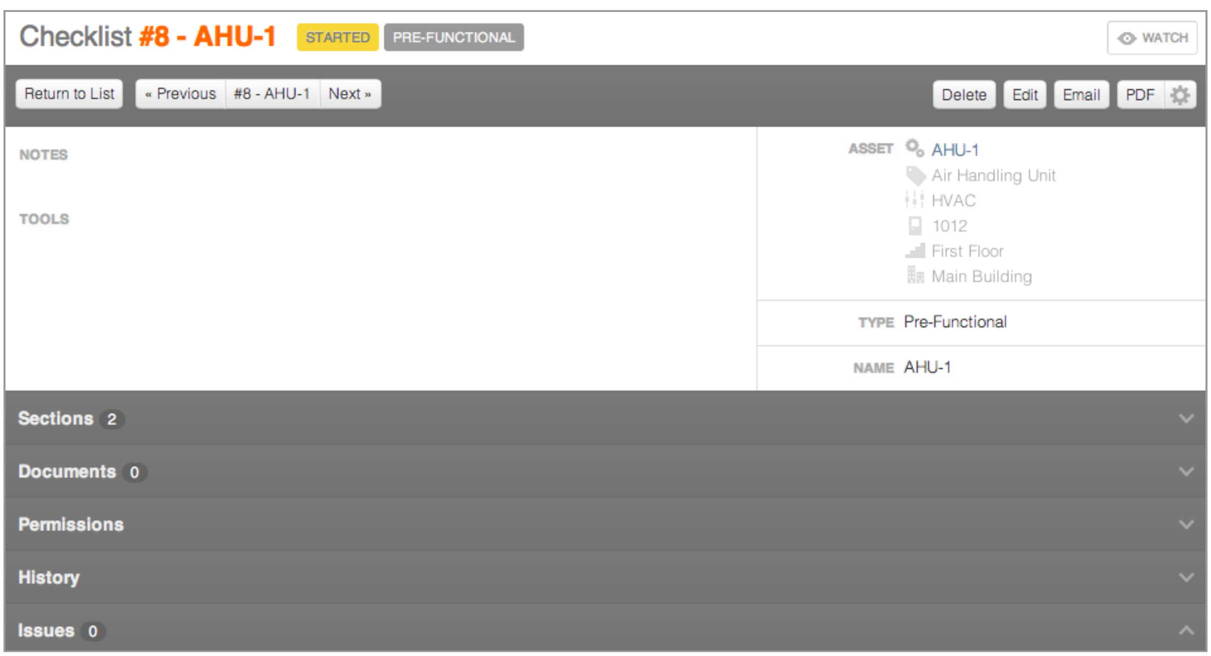
To respond and close an issue from a report, simply click the report from the list and navigate to the specific issue. To add a response to the issue, see Responding to Issues. To update the status of the issue, see Issue Statuses.

Overview

In the Checklist section of the site, you can create, edit, and complete checklists for systems and equipment that are installed during the construction phase of the project. In addition, checklists may be created to track safety or other important items that are not directly related to assets.



Each checklist contains sections of procedure lines, documents, permissions, history, and issues. Each section can be expanded by clicking the section name.

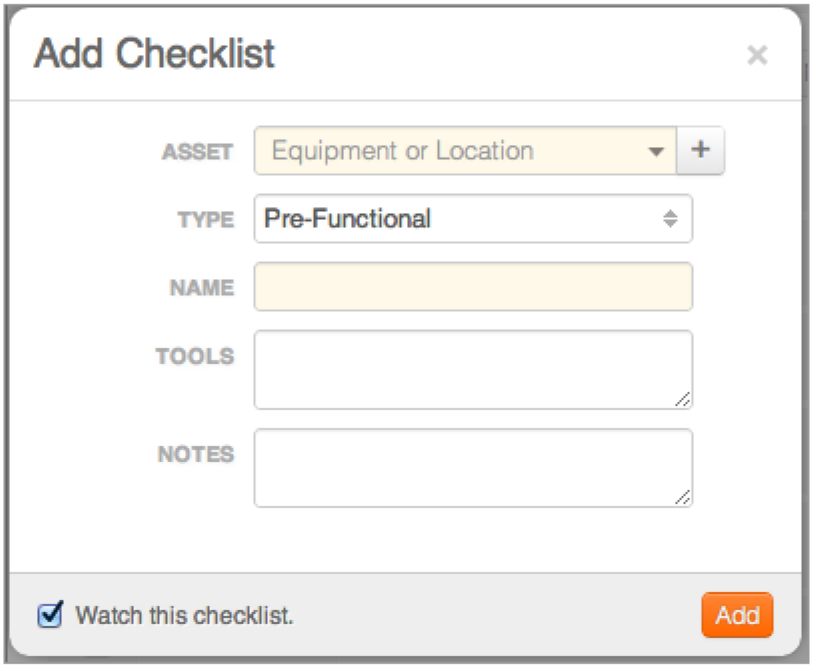


Checklists can be batched from the existing template library or created from a blank form. Any of the above methods is an acceptable way to create new checklists. Note: you can import a checklist from a spreadsheet and use as a template.

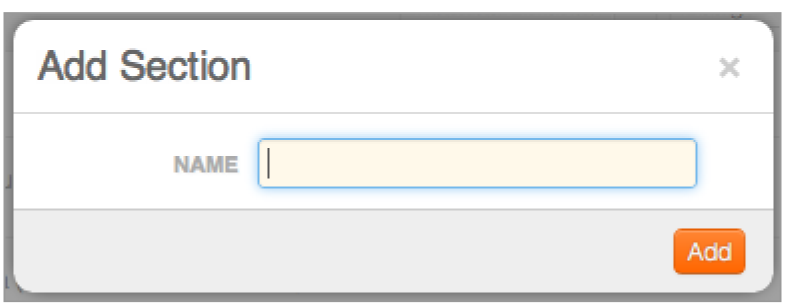
Creating a Checklist from a Blank Form

You can create a new checklist from a blank form by clicking Add New on the Checklist page.

In the new window, complete the fields including asset or location, type, and checklist name. Click Add to create the checklist. A blank checklist will be created.



You can now add lines to the checklist and assign it to an individual to complete. To add lines, click Add Section. Enter the section name and click Add.



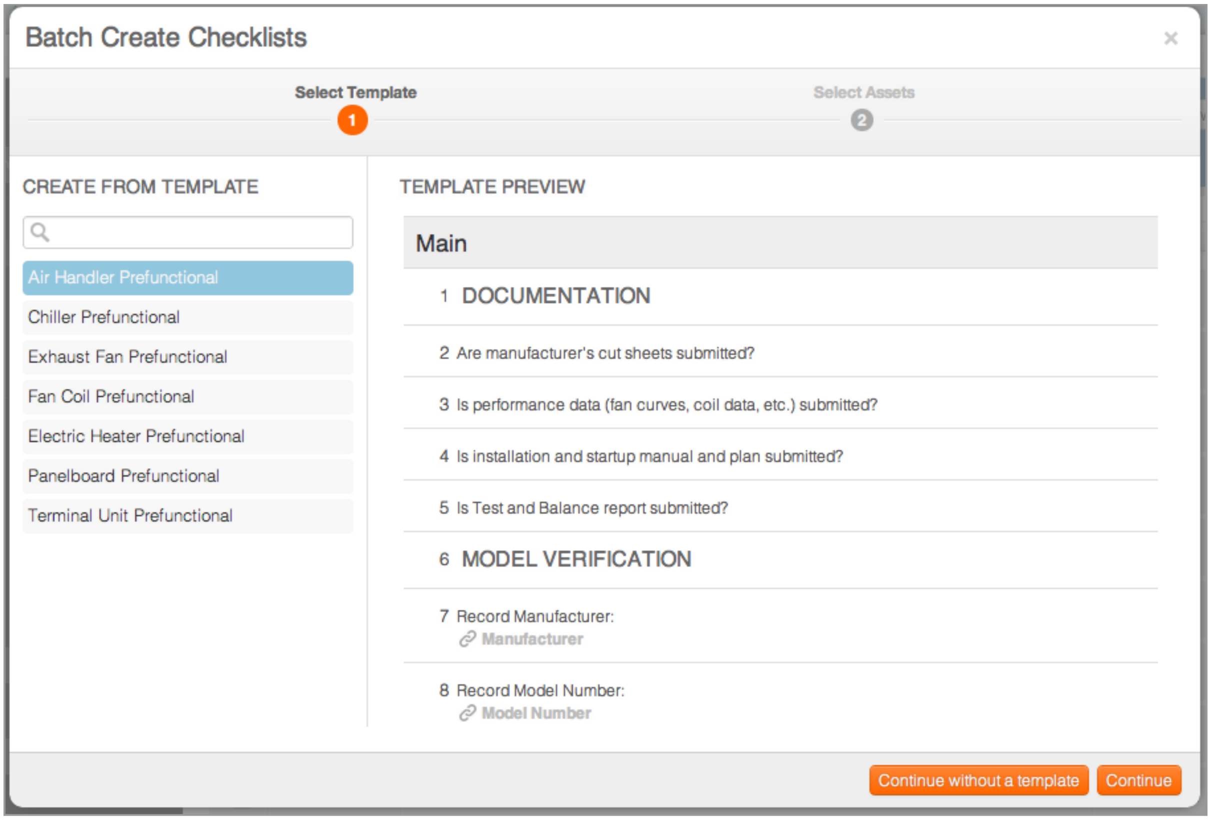
The new section will be created, along with one default checklist line. Click Add Line at the end of the row to add multiple lines to the checklist section. Type your checklist lines and click Save or hit the Enter key to save your line information. Add additional sections using the same process.

Note: the checklist default status is activated once a section is added. This status will not be shown until at least one section is added. All checklist statuses follow the status setup located in the project settings.

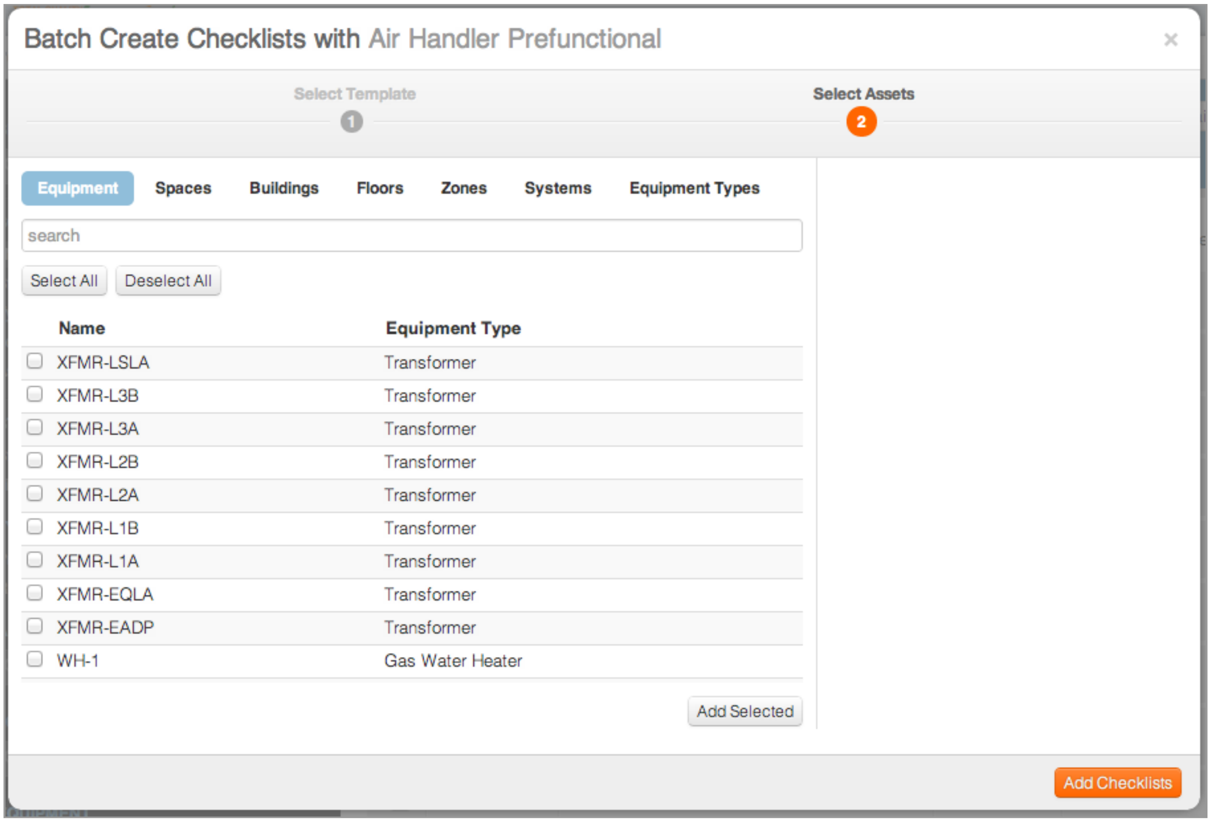
Batching a Checklist

Batching is using a template of a checklist and creating multiple copies for several different pieces of equipment. To batch one or more checklists from the Template Library, click Batch Add on the Checklist list view.

In the new window, select the template from the list on the left. You can search for the template by typing in the search box above the list. A preview of the template is shown on the right. Click Continue.



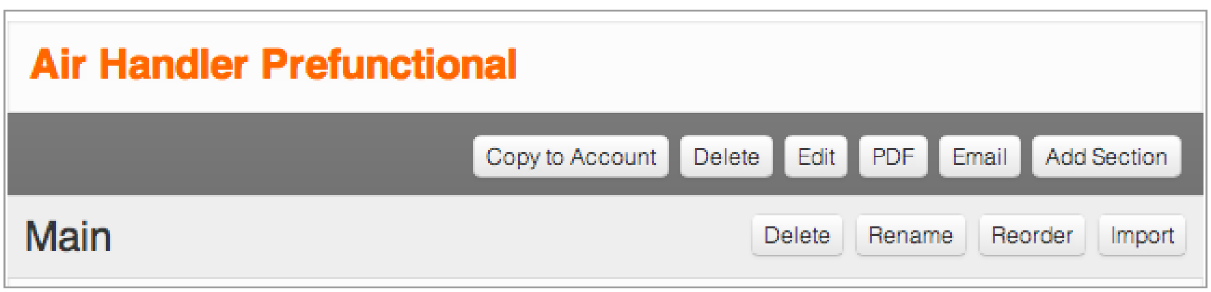
Select the assets for which you will attach the checklist template. These may include systems, equipment, equipment types, or location elements. You can search for any of these by typing in the search box above the list. Select the items and click Add Selected to add them to the selected list on the right.



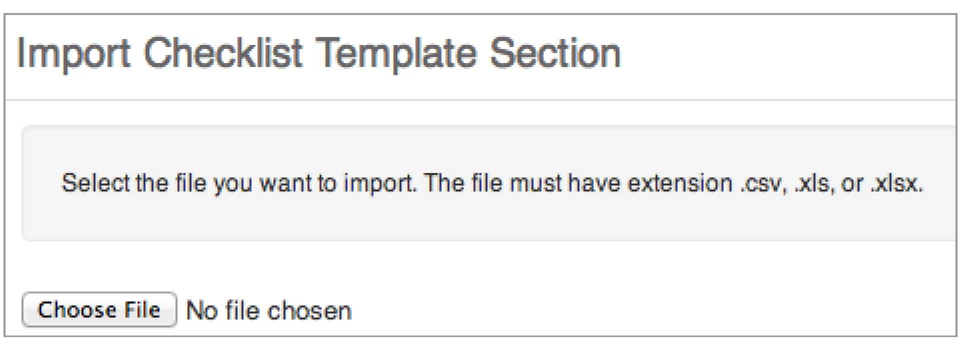
Click Add Checklists when you have finished selecting all the items for which to attach the template.

Importing Checklist Questions

To import a checklist from a spreadsheet, go to Checklist Templates under the Checklist tab. You can import into an existing template or add a new one. Select the checklist section and click Import.

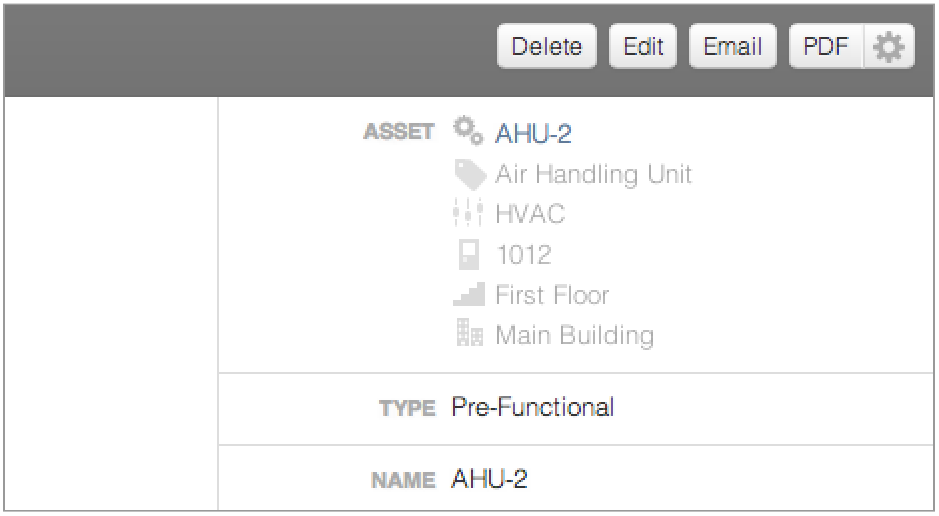


In the new window, select the file from your computer and select the description column to import.



Editing a Checklist

To edit a checklist, simply select the checklist you wish to edit from the Checklists page. From here, you can edit any of the fields at the top of the page by clicking Edit. Enter your changes and click Save.



You can also edit questions in the checklist by selecting the section and clicking Edit on the question row. Enter your changes and click Save.

To edit answers, click Note on the corresponding question row. Enter your changes and click Save.

Reordering a Checklist

If the questions in your checklist are not in to correct order, you can easily move them around and change the order. To do this, click Reorder in the appropriate section. Click the checkbox next to the line you want to move and click between the rows where you want the line to move. The row or rows will move to that new position in the section and automatically renumber.

CxAlloy TQ

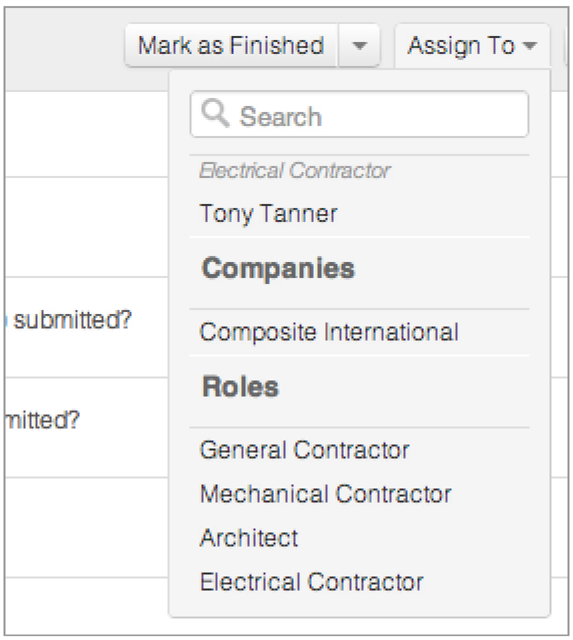
Formatting a Checklist

To change the appearance and organization of your checklist, you can bold, italicize, and indent questions. You can also make each line a header, which removes the checkmark and note option. To do this, click Edit on the question you wish to format. Select the appropriate format and click Save.

Checklist Assignments

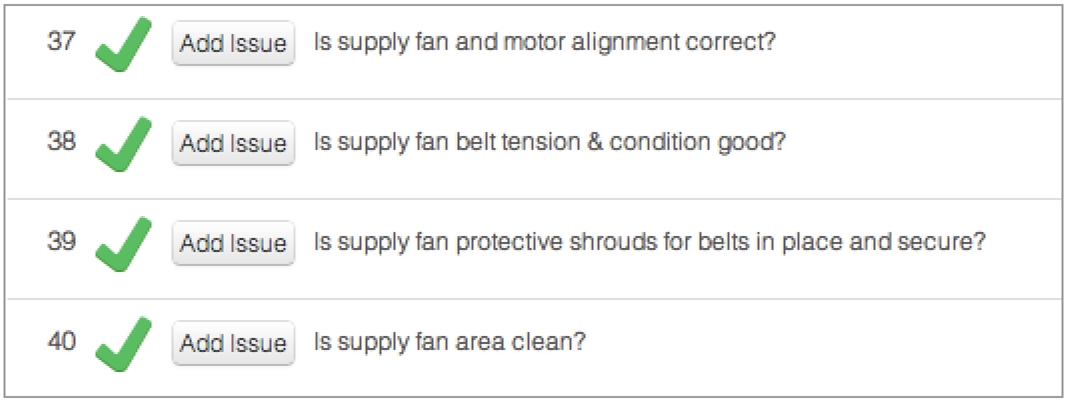
Each checklist section has the option of assigning a responsible party to complete that section. This may be either a person, company, or role.

To assign a checklist section, click Assign To in the appropriate checklist section. Choose either a person, company, or role. The chosen selection will be listed next to the section status.



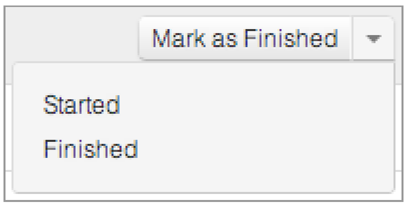
Completing a Checklist

To complete a checklist, select the checklist from the list view. Find the appropriate section assigned to you. Click the checkboxes on the left of the questions to complete that row. Click Note on the corresponding row to add a detailed answer or comment. Type in your note and click Save.



When you are finished completing answers in the checklist section, update the status to the appropriate new status.

The typical flow of a checklist section will start as being Started and assigned to a user. Once the user has completed the section, he or she will mark it as Finished. Additional statuses for managing approvals can be added in the project settings.



The main status button will display the next status in turn for the checklist section, but the arrow allows you to set the status to any of the authorized statuses from a drop down menu. Checklist section statuses can be access controlled in the settings section.

Uploading to a Checklist

Each checklist has the option of uploading multiple files. See Uploading Files for more information.

Adding Issue to a Checklist

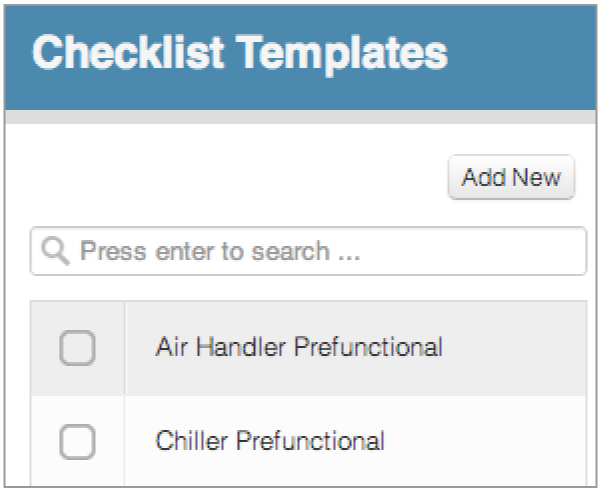
Each checklist has the option of adding issues. To add issues, click Add Issue in the issue section. See Adding Issues for more information.

Checklist Template Overview

Checklist templates provide a mechanism for saving standard checklists and reusing them on project assets or on other projects.

You can set up templates with all required questions, formatting, etc., and batch them for project assets.

To search for templates, click Checklist Templates under the Checklist tab. Enter your template name in the search box above the template list on the left and hit Enter.



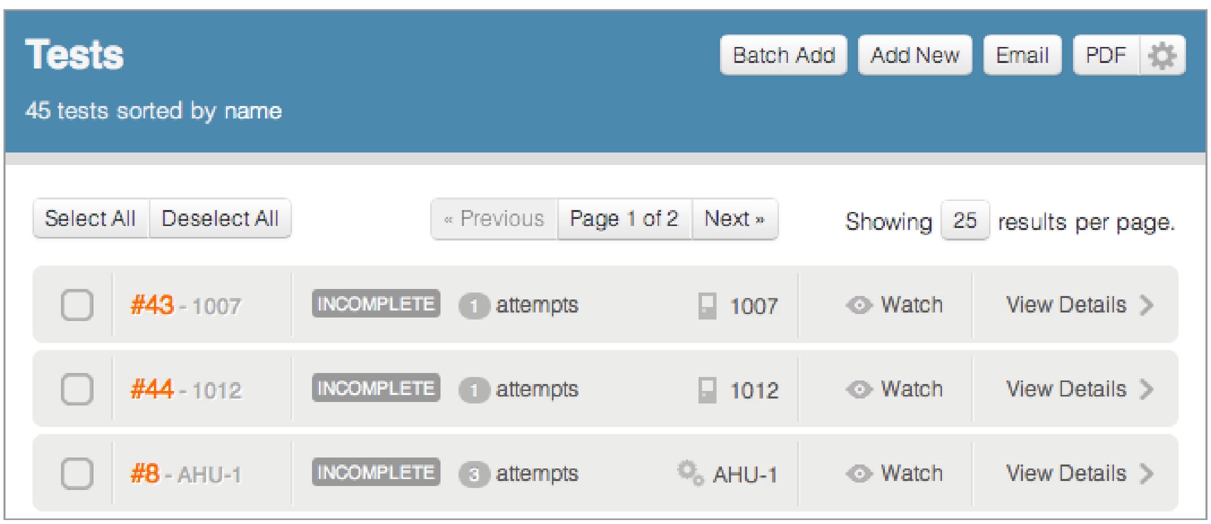
Preview each template by selecting it from the list on the left.

Editing a Checklist Template

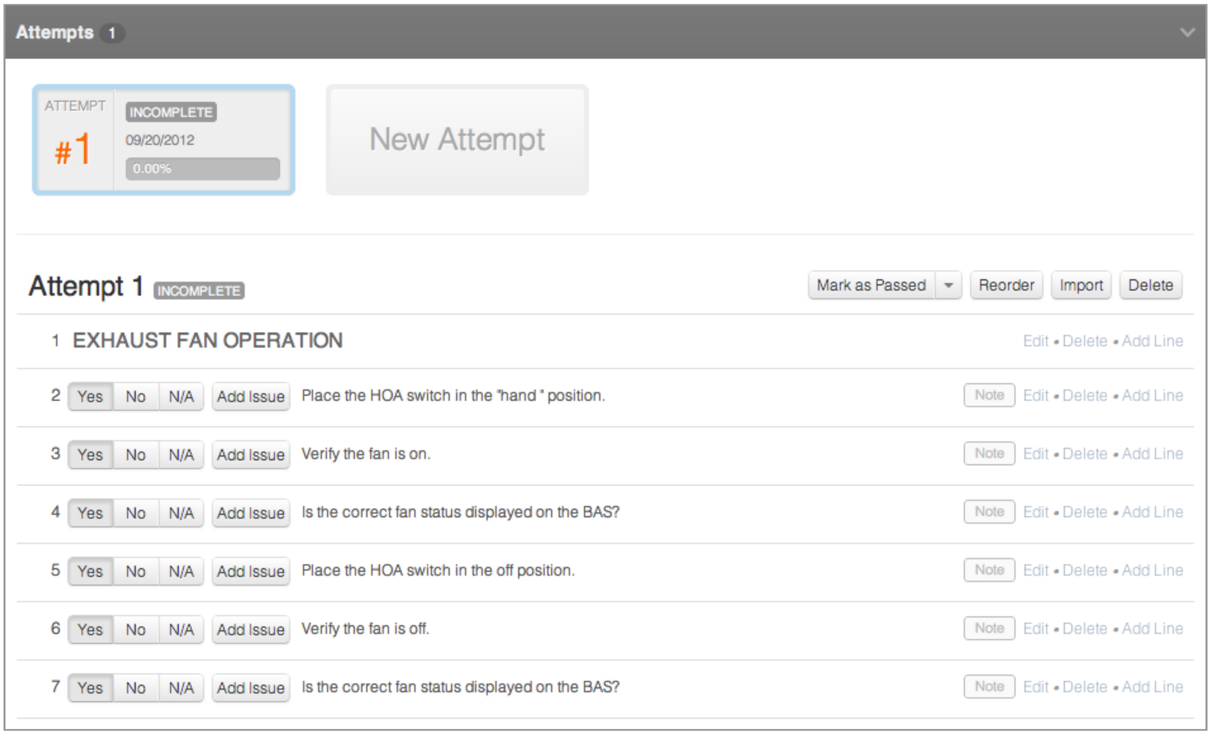
Checklist templates can be edited, reordered, and formatted similarly to the regular checklists. See Editing Checklists for more information.

Overview

In the Test section of the site, you can create, edit, and complete tests for systems and equipment that are installed during the construction phase of the project. These are used in validating system and equipment performance.



Each test contains documents, permissions, history, and issues. However, procedure lines and test statuses are organized by test attempts. Each attempt can be expanded by clicking the attempt box.



Tests can be batched from the existing template library or created from a blank form. Any of the above methods is an acceptable way to create new tests. Note: you can import a test from a spreadsheet and use as a template.

Creating a Test from a Blank Form

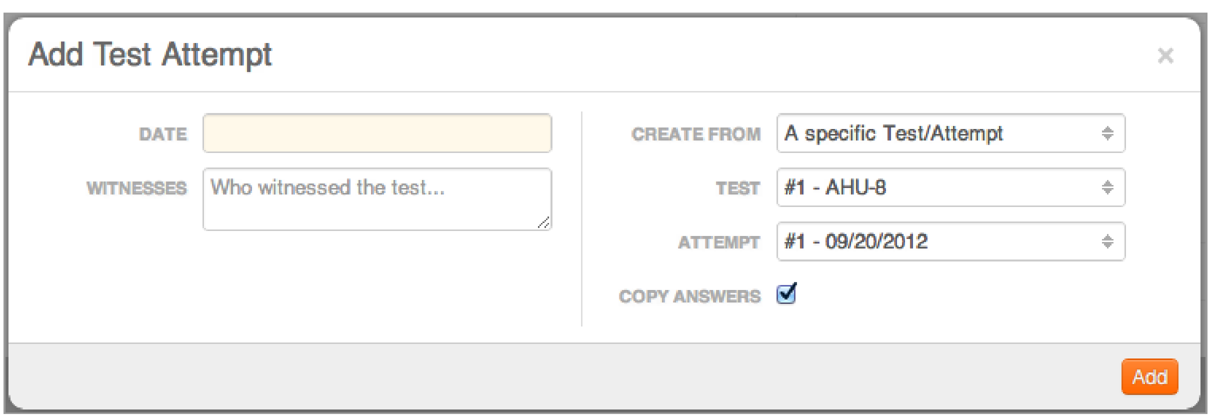
You can create a new test from a blank form by clicking Add New on the Test page. See Checklists for more details.

In the new window, complete the fields including asset or location, type, and test name. You can also add estimated time, tools, and general notes. Click Add to create the test. A blank test will be created.

You can now add attempts and lines to the test and assign it to an individual to complete.

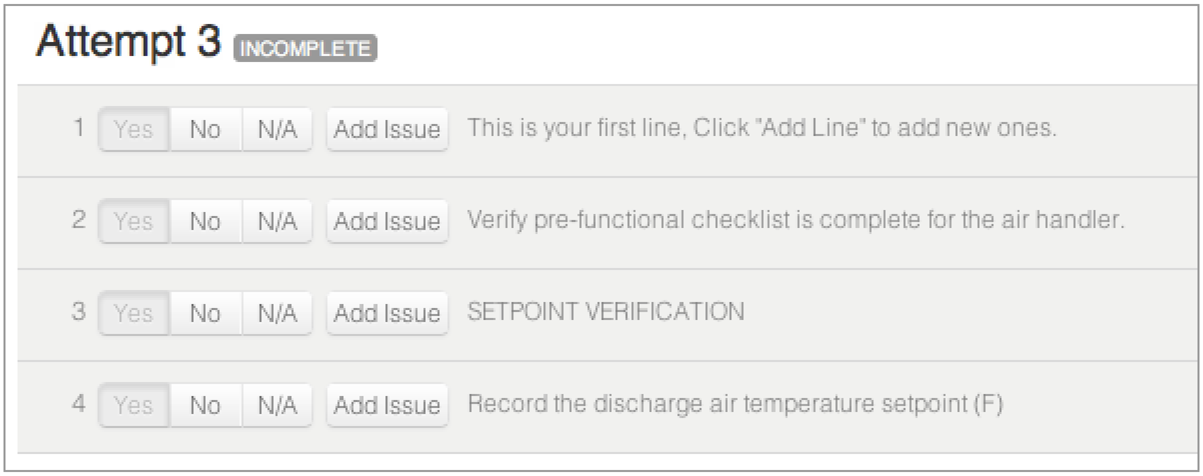
Adding Test Attempts

To add an attempt, click New Attempt. Enter the attempt date and witness. Choose from the following attempt options: A specific Test/Attempt, an Empty Attempt, or an Attempt Template.



Choosing A Specific Test/Attempt provides you with the option of selecting a specific test from your list and a related attempt within that test. Use this option if you want to copy a known test attempt to your current test.

The new test attempt will be created with copies of the selected past attempt lines. All copied lines will include the previous answers. These are indicated with a darker gray color. Select the answers again on these rows to verify the answers and remove the gray shading.



Choosing An Empty Attempt provides you with a blank attempt. Use this option if you want to have an attempt with little or no lines in it.

For blank attempts, the new test attempt will be created, along with one default test line. Click Add Line at the end of the row to add multiple lines to the test attempt. Type your test lines and click Save or hit the Enter key to save your line information.

Choosing An Attempt Template provides you with the option of selecting a template from the Test Templates section. Use this option if you want to use a Test Template.

For attempts from templates, a new test attempt will be created with all formatted lines from the template.

Note: the test default status is activated once an attempt is added. This status will not be shown until at least one attempt is added. All test statuses follow the status setup located in the project settings.

Batching a Test

Batching is using a template of a test and creating multiple copies for several different pieces of equipment. To batch one or more tests from the Template Library, click Batch Add on the Test list view. See Checklist section for more details.

In the new window, select the template from the list on the left. You can search for the template by typing in the search box above the list. A preview of the template is shown on the right. Click Continue.

Select the assets for which you will attach the test template. These may include systems, equipment, equipment types, or location elements. You can search for any of these by typing in the search box above the list. Select the items and click Add Selected to add them to the selected list on the right.

Click Add Tests when you have finished selecting all the items for which to attach the template.

Importing Test Questions

To import a test from a spreadsheet, go to Test Templates under the Tests tab. You can import into an existing template or add a new one. Select the test and click Import. See Checklist section for more details.

Editing a Test

To edit a test, simply select the test you wish to edit from the Tests page. From here, you can edit any of the fields at the top of the page by clicking Edit. Enter your changes and click Save. See Checklist section for more details.

You can also edit questions in the test by selecting the attempt and clicking Edit on the question row. Enter your changes and click Save.

To edit answers, click Note on the corresponding question row. Enter your changes and click Save.

Reordering a Test

If the questions in your test are not in the correct order, you can easily move them around and change the order. To do this, click Reorder in the appropriate attempt. Click the checkbox next to the line you want to move and click between the rows where you want the line to move. The row or rows will move to that new position in the attempt and automatically renumber.

Formatting a Test

To change the appearance and organization of your test, you can bold, italicize, and indent questions. You can also make each line a header, which removes the answer and note option. To do this, click Edit on the question you wish to format. Select the appropriate format and click Save.

Test Assignments

Each test has the option of assigning a responsible party to complete that test. This applies to all test attempts within the test and may be either a person, company, or role.

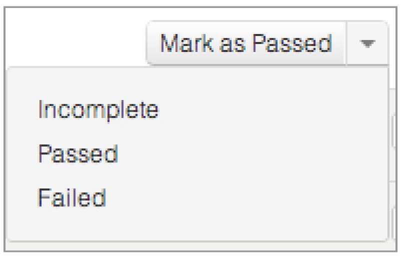
To assign a test, click Assign To in the upper righthand corner. Choose either a person, company, or role. The chosen selection will be listed under the header.

Completing a Test

To complete a test, select the test from the list view. Find the appropriate attempt. Click the answers on the left of the questions to complete that row. Click Note on the corresponding row to add a detailed answer or comment. Type in your note and click Save.

When you are finished completing answers in the test attempt, update the status to the appropriate new status.

The typical flow of a test section will start as being Incomplete and assigned to a user. Once the user has completed the section, he or she will mark it as Passed. Additional statuses for managing approvals can be added in the project settings.



The main status button will display the next status in turn for the test attempt, but the arrow allows you to set the status to any of the authorized statuses from a drop down menu. Test attempt statuses can be access controlled in the settings section.

Uploading to a Test

Each test has the option of uploading multiple files. See Uploading Files for more information.

Adding Issue to a Test

Each test has the option of adding issues. To add issues, click Add Issue in the issue section. See Adding Issues for more information.

Duplicating a Test

Test attempts can be duplicated by selecting them in the Test/Attempt option while creating a new test attempt. See Adding Test Attempts for more information.

Test Template Overview

Test templates provide a mechanism for saving standard tests and reusing them on project assets or on other projects.

You can set up templates with all required questions, formatting, etc., and batch them for project assets.

To search for templates, click Test Templates under the Tests tab. Enter your template name in the search box above the template list on the left and hit Enter.

Preview each template by selecting it from the list on the left.

Editing a Test Template

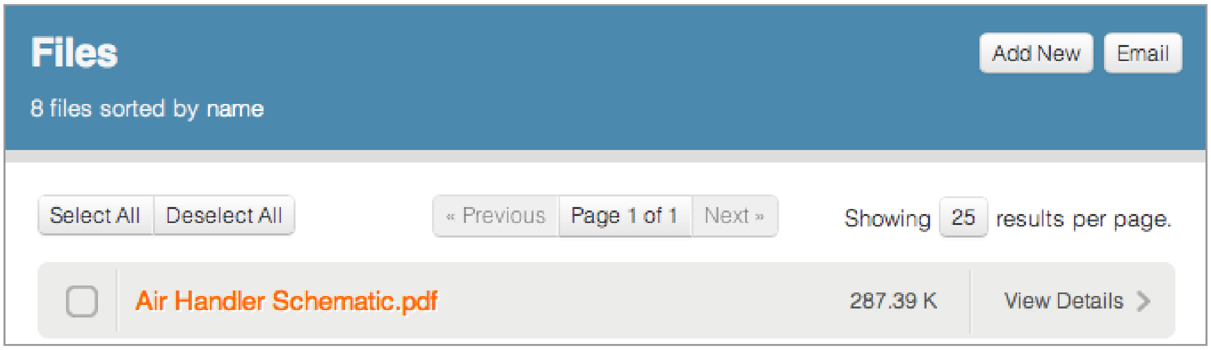
Test templates can be edited, reordered, and formatted similarly to regular tests. See Editing Tests for more information.

Overview

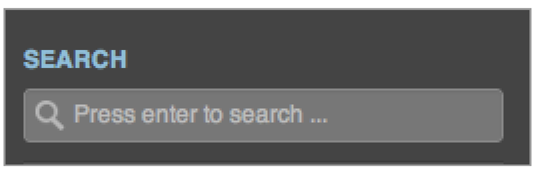
The Files section of CxAlloy is a central storage for all files that have been uploaded to the site. You can upload files directly to the Files section. You can also view files that have been uploaded to individual items, such as issues, checklists, or equipment.

Searching for Files

Files are organized by source and type. These filters are available on the lefthand side of the page. Files uploaded using other sections of the site (such as images uploaded to issues or PDFs uploaded to equipment) can be viewed using these filters.



You can also search directly for a file using the search box. Type the filename (or partial name) into the search box at the top left of the page and press Enter. If any files match your search terms, they will be listed on the right.

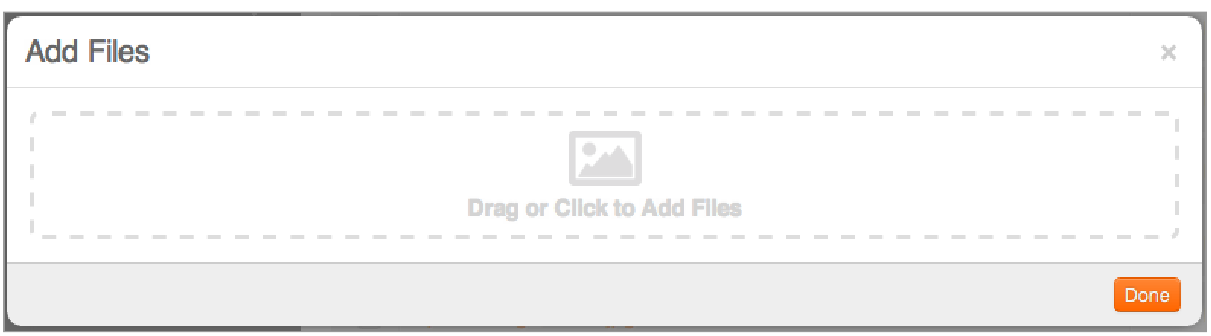


Uploading Files

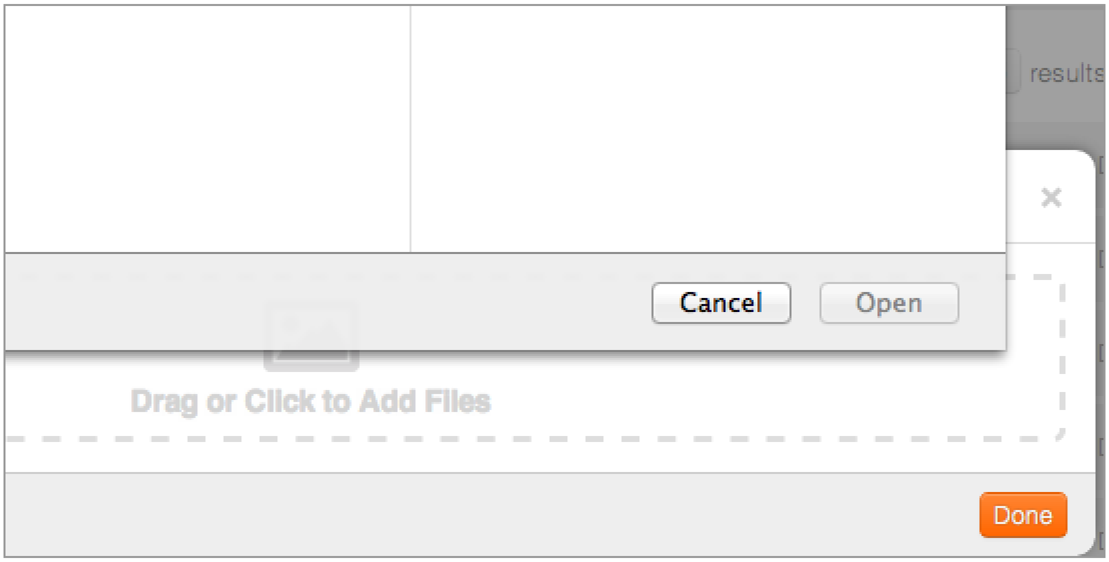
To upload a new file, click Add New. A new window will appear to allow file uploading. You can drag images from your computer or choose them from a file select box. CxAlloy supports uploading a variety of file types, including most documents, images, movies and text files.

Note: There is a 100mb size limit per file.

To use the document drag-and-drop feature, select a file on your computer. Next, drag the file over the new window. Release the file, and the file upload will begin.



To use the traditional file upload method, click inside the dashed document window to see the file select window. Select the file from your computer and click Open.

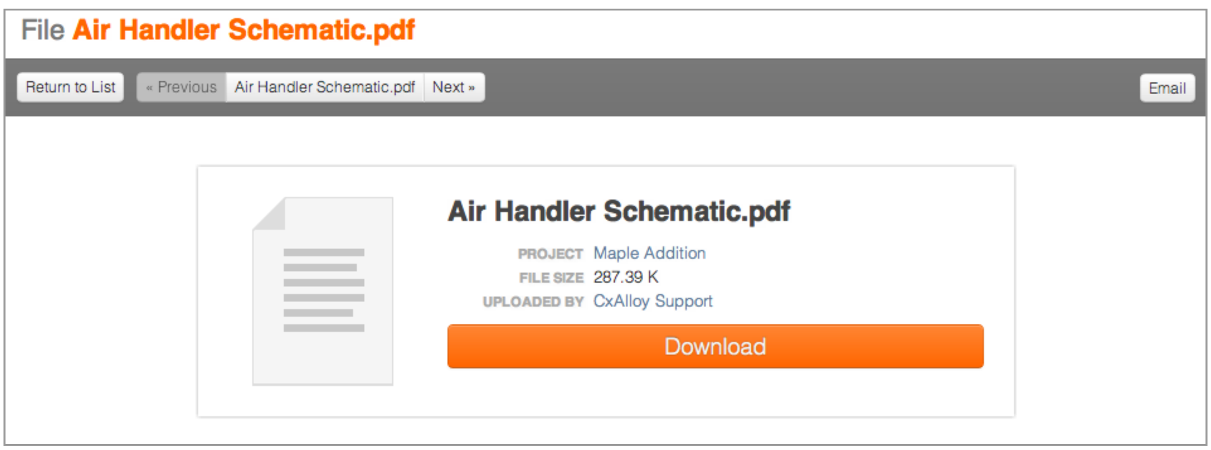


There is no file versioning, so uploading a document with the same name as another document will result in two identically named documents. This will not cause a problem for the system, but may cause confusion for the user since it will be hard to differentiate the two documents.

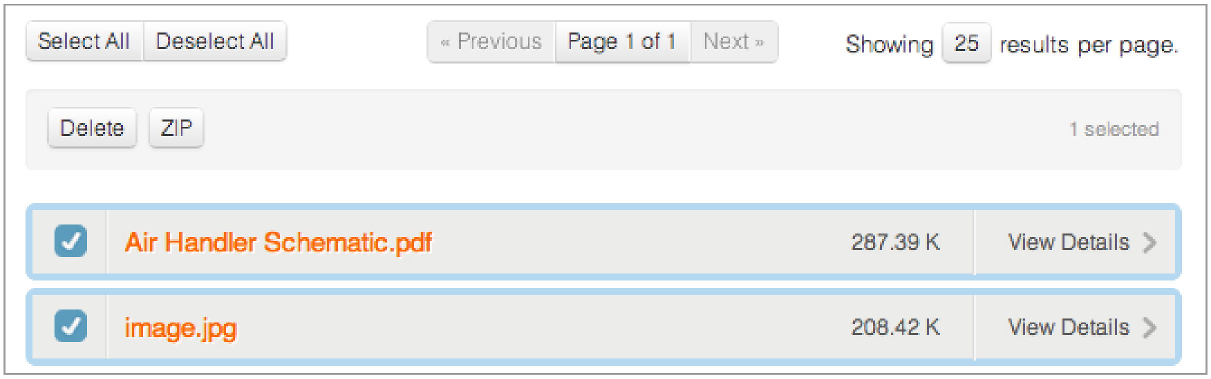
Downloading Files

To download a file, click the filename. The download process will immediately begin.

You can also click View Details to navigate to the detail page of the file. Click Download to download the file.

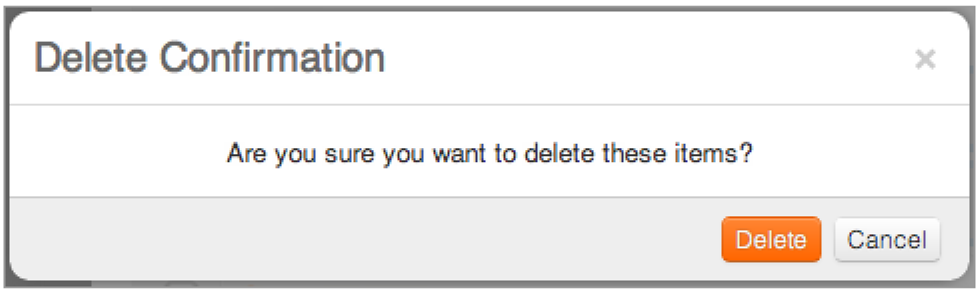


If you want to download multiple files, check the box next to each of the files you want to download. A new function bar will appear above the list. Click ZIP to download a zipped file of all selected files.



Deleting Files

To delete files, check the box next to each of the files you want to delete. A new function bar will appear above the list. Click Delete. Click Delete again to confirm you want to delete the files.



Emailing Files

You can send a link to other users notifying them of a new file.

See Emailing Links for more information.