Getting Started
A GUIDE FOR TEAM MEMBERS
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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 collaborative issue management, asset tracking, and quality verification through checklists and tests. It enables 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. By storing the information in a central location, CxAlloy is also able to generate realtime, accurate indicators of the status and performance of a project.

User Expectations

As a member of the team, you are expected to collaborate with others through the software. Without your participation, the process will not be as successful nor reach its full potential.

Your participation will likely include the following activities:

- Activate your account.
- Upload files.
- Update issues.
- Complete checklists or tests.

We think you’ll enjoy using CxAlloy TQ. CxAlloy TQ was designed for its users. We made it to streamline data entry and report generation, manage large sets of data, and increase efficiency for everyone. You can communicate faster, better, and without a lot of the hassle from traditional methods.

Your Account

New account users will receive a welcome email to CxAlloy TQ; be sure to click on the link in this email to activate your account. Following the link will take you to a page where you can finish creating your account and set your password. If you already have an account with CxAlloy TQ for another project, the project will now be listed with your other projects.
After you have activated your user account, you can manage your account on your profile page. Your profile page has many configurable options, including email notifications and password resets. Please take a look here and make sure everything is set the way you like it.

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 Sign In at the top right of the page. If you bookmark individual pages in a project, you may be prompted to log in before being redirected to your page.

**STEP 2**
Enter your email address and password. Each account has a single email address and password associated with it. If you forget your password, click Forgot your password? to request a password reset. You will receive an email with instructions for creating a new one.

**STEP 3**
After logging in, you will be directed to your Home page, or if you were visiting a specific page, you will be directed to that page.

Navigating CxAlloy TQ

Upon logging in to CxAlloy TQ, you will be directed to your Home page. This is your personal page of important items and includes a summary of recent activity, items you have watched, items assigned to you, and a list of all your active projects.

Under Recent Activity, you will see a summary of new and updated items over the past week across all your active projects. Click the summary square to see a detailed list of activity.
Under your **Watched Items**, you will find all items across your projects that you have flagged to "watch." These may include equipment, issues, checklists, tests, and others. Click the name to view the item.

Your **Assigned Items** contains all items across your projects that have been assigned to you. Click the name to view the item.

If there are recent changes to your **Watched** or **Assigned** items, a "+" will appear to the left of the item, which you can click to see details on the changes.

The right hand sidebar will show you a list of all your active projects. You can search the list using the search box at the top of the list. If you need to access an archived project, you can click **All My Projects** to view a list of both active and archived projects.

Select the project you would like to view by clicking on its name, and you will be brought to the **Project Dashboard**. Now you are working in a project. The majority of your time in CxAlloy TQ will be spent working in a project. Within a project, the main navigation tabs are located near the top of the page. These tabs have submenus with related sections. Click on the menus and submenus to access different parts of the project.
While logged into CxAlloy TQ you will always have access to the persistent navigation bar at the very top of the page. The **Home** icon will take you back to your Home page. Next to the Home icon is an arrow you can click to quickly view other projects you have access to. On the far right, you can click **Help** to access our online help. Finally, you can click your email address to access your **Profile** and **Logout**.

### Updating Issues

Part of your work on the project will often involve updating issues to document the work you have done, changing their status, reassigning them, and uploading photos. To view the issues in the project, click **Issues** in the project menu bar, then **Design Issues** or **Construction Issues** (you will most likely be working with **Construction Issues**). To view only the issues assigned to you, click **Issues** in the project menu bar, then **My Design Issues** or **My Construction Issues**.

On the left side of the page, you can narrow the list of issues with a search or with filters. To deselect a filter, click on it again. The links to **My Design Issues** and **My Construction Issues** are simply shortcuts to using the **Assigned To** filter.
Commenting, assigning, and changing issue status are all available under the **Actions** menu at the top right of each issue.

To add a comment, select **Comment** under the **Actions** menu. Alternatively, you can click **Comments** at the bottom of the issue to view the existing comments and add a new one. In the text box, enter your comment and click **Add Comment**. Your name and date will be shown with the comment.

To update the status of an issue, click **Change Status…** under the **Actions** menu and select the appropriate issue status. Some statuses may not be available, depending on your permissions. These statuses follow the status workflow set by the project administrator.

To reassign an issue, select **Assign To…** under the **Actions** menu and select the appropriate assignee.

If you need to add a photo or other file to an issue, click **Files** at the bottom of the issue. You will see all currently attached files as well as an area to drag new files. You can also click to select files instead of dragging.

### Uploading Files

We’ve already seen how you can add files to an issue. You can also upload files to the project in the **Files** section. You can upload almost any kind of file to CxAlloy TQ. They may be design documents, such as drawings or specifications. They may be equipment submittals, maintenance manuals, or test reports, or they could be something more generic that needs to be shared with the entire team. In any case, you can upload files and let team members know about them.

**STEP 1**

Select **Files** from the project menu bar.

**STEP 2**

Click **Add New** at the top right of the page and select whether you would like to create a folder or upload a file. To create a folder, select **Folder** and enter a name. To upload a file, select **Files**. In the
new window, you can upload files by clicking and browsing through your computer or by dragging files to the window.

STEP 3
Notify your team. Be courteous to others and let them know what you have uploaded. You can easily notify team members by clicking the Email button at the top right of the page. Choose the people, companies, or roles to notify.

Completing Checklists

The Checklists section contains a list of all checklists for the project. On the left side of the page, you can perform searches and apply filters to the list of checklists. Checklists can be assigned to individuals, companies, or roles. If you have been given the permissions to access these items, select a checklist to view the detailed view of the checklist.

Checklists may be divided into multiple sections, with different team members assigned to each section. For example, a startup checklist may have electrical and mechanical sections that are to be completed by the electrical and mechanical contractors, respectively.
To complete checklist lines, click on the appropriate answer, such as the checkmark, on the left side of the line. To add a note or record a requested value, click the Note button. If you discover any issues while completing your checklist, you can add them to a line by clicking Add Issue. Finally, you can change the status of a checklist section from the section header. Once all sections of a checklist are marked as complete, the checklist itself will be considered complete as well.

Support

Hopefully, you never run into any problems with our CxAlloy products. If you do encounter any problems, or even if you just have a question, you can always contact our support team at support@cxalloy.com. In addition we offer online help documentation at https://tq.cxalloy.com/help

If you have any problems or question, feel free to contact our Technical Support team at support@cxalloy.com. We will be happy to help you however we can.