planswift® pro
by ConstructConnect
Corporate Control User Guide

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Overview

This PlanSwift Corporate Control User Guide will guide you in managing PlanSwift users from the Corporate Control Dashboard, including:

- Logging in
- Viewing and downloading User Summary, License Distribution, and Training Distribution Reports
- Viewing Branches
- Creating Branches
- Adding Users
- Moving Users from one Branch to another
- Viewing Activation Status
- Viewing Licensing Status
- Nuking Users.

Logging into the Corporate Control Dashboard

PlanSwift provides a secure means of logging into the Corporate Control Dashboard using the following link:
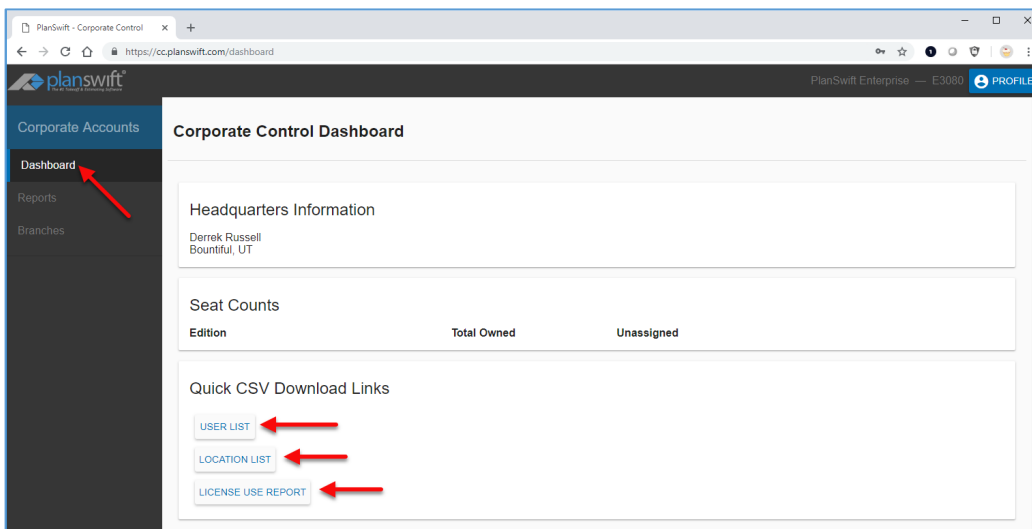
https://cc.planswift.com/login

Figure A-1 shows the login window. Use the credentials (**E-Mail Address** and **Password**) your administrator provided you to log in. Click on **FORGOT YOUR PASSWORD** if you have forgotten your password, and you will receive an email allowing you to reset your password.
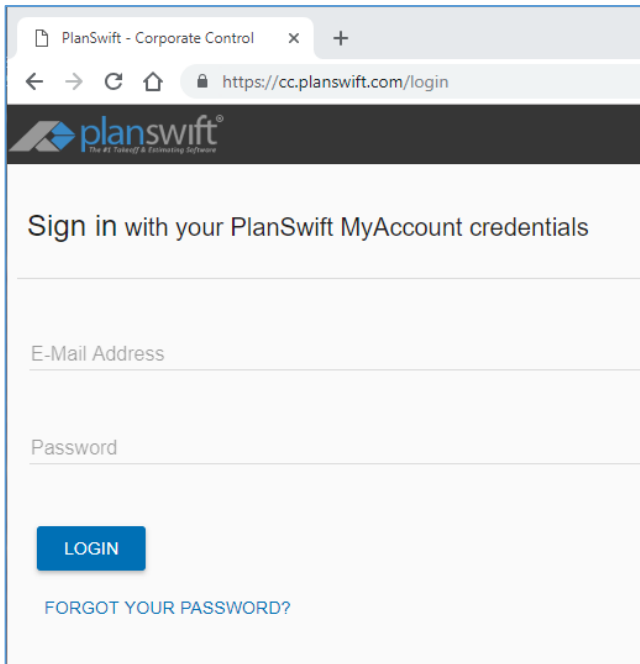
Figure A-1

After you log in, the **Corporate Control Dashboard** appears (Figure A-2). Three quick CSV lists (which can be opened in Excel) can be selected from this **Dashboard**:

- **USER LIST** (Figure A-3)
- **LOCATION LIST** (Figure A-4
- **LICENSE USE REPORT** (labeled the **User Summary Report**, Figure A-5). This report is also available under the **Reports** tab.

Figure A-2

Figure A-3

Figure A-4

Figure A-5

Viewing and Downloading Reports

The **Dashboard** also allows you to view **Reports** under the **Reports** tab (Figure B-1). Clicking on the **Reports** tab displays three reports that are available:

- **User Summary Report** (shown in Figure B-2). This report shows all locations, with all their licenses, and all active seats for each. The **DOWNLOAD REPORT CVS** button on the **User Summary Report** creates the same report as shown in Figure A-5.
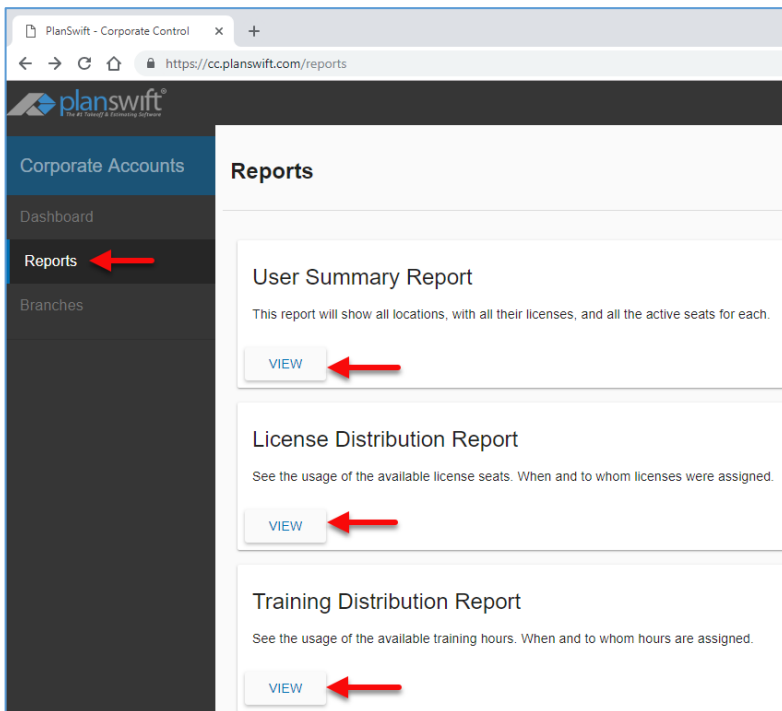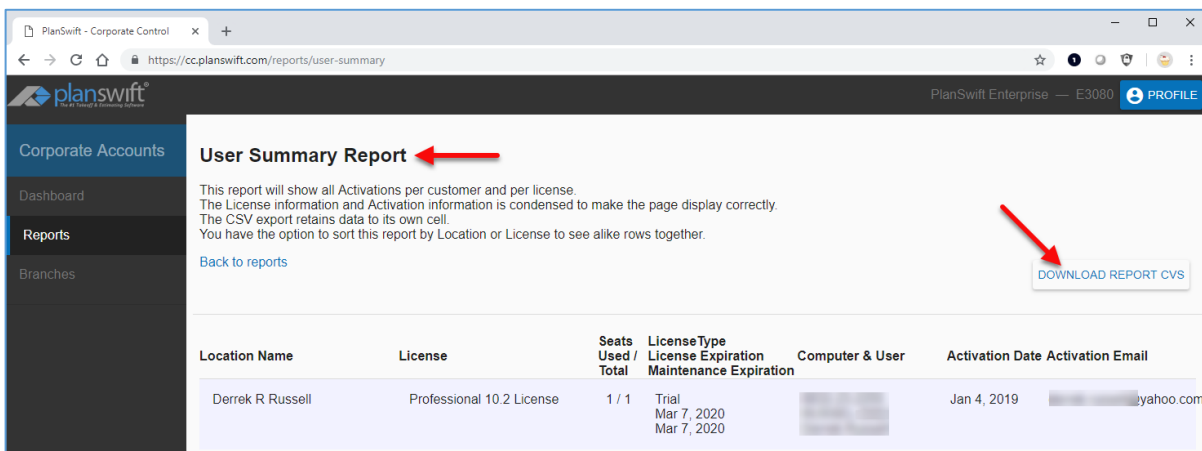

Figure B-1

Figure B-2

- **License Distribution Report** (Figure B-3). This report shows the usage of available license seats and when and to whom licenses were assigned. The **DOWNLOAD REPORT CVS** button on the **License Distribution Report** has not yet been implemented.

Figure B-3

- **Training Distribution Report**. This report has not yet been implemented.

Manipulating Branches

The Dashboard also allows you to view **Branches** under the **Branches** tab (Figure C-1). **Branches** are used to store the **Users**. From here you can add new **Branches**, and access **Branches** for further manipulations.

Adding a New Branch

Clicking on **Branches** displays **Branches** that have been created. Clicking on the **ADD NEW BRANCH** button allows you to create a new **Branch** (Figure C-2).

Figure C-1

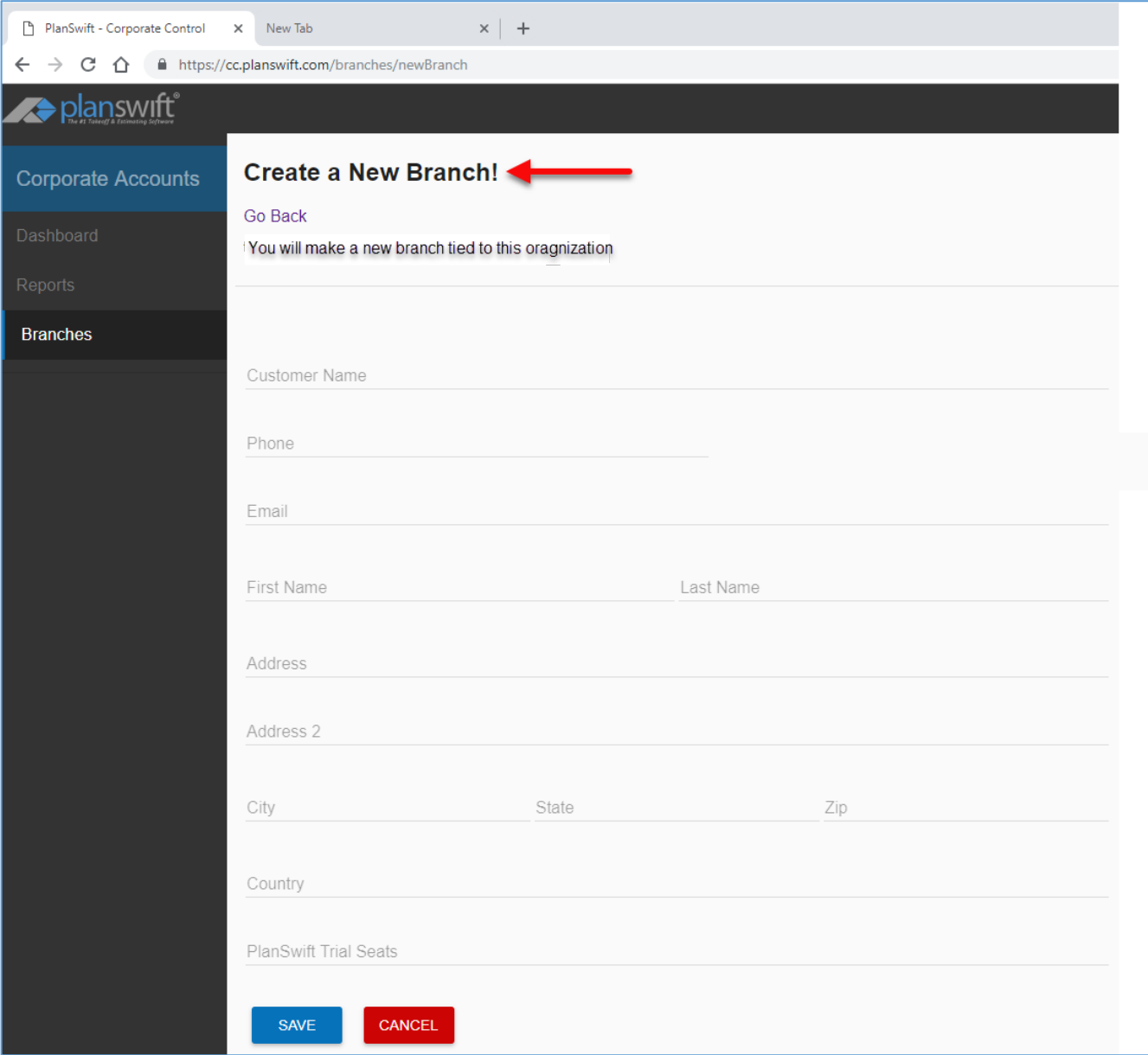Entering in the customer data for a new **Branch** and clicking on the **Save** button creates the new **Branch**.

Figure C-2

Filtering and Searching for Branches

Branches listed in the **Branches** tab (Figure D-1) may be filtered by **ID**, **Owner**, **City**, **State**, **Lifecycle**, and **Age** (in days). Clicking on the column headings will reorder (filter) the **Branches**. The **Search** field allows you to search for any **Branch** by typing in any the beginning characters of any **Branch's ID**, **Owner**, **Name**, **City**, **State**, or **Lifecycle** field value, and all **Branches** that include the typed characters will be displayed. Once the **Branch** you want to manipulate is visible, click on it (or click on the blue **Bookmark** symbol to the right) to drill down into **Branch's** details.
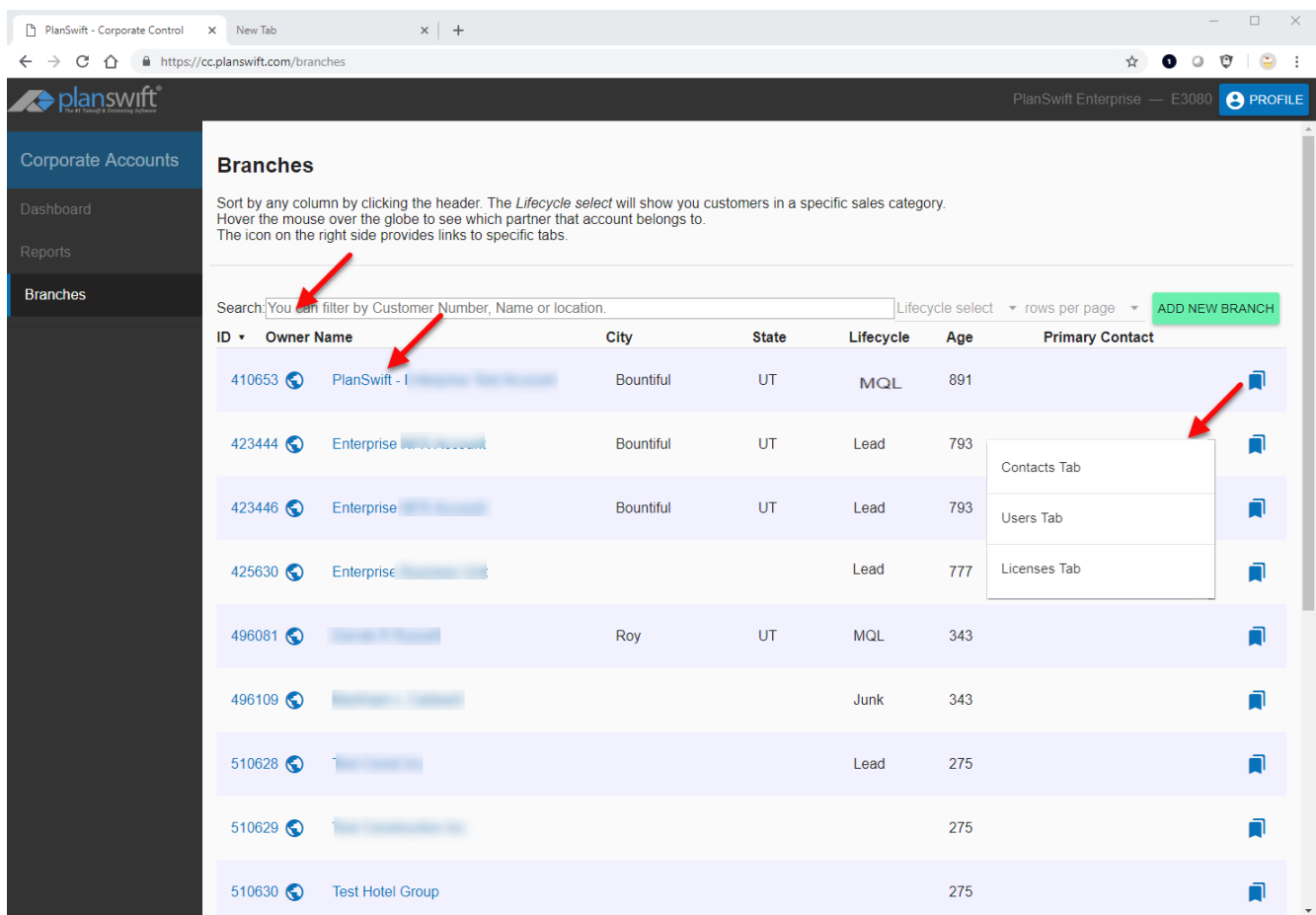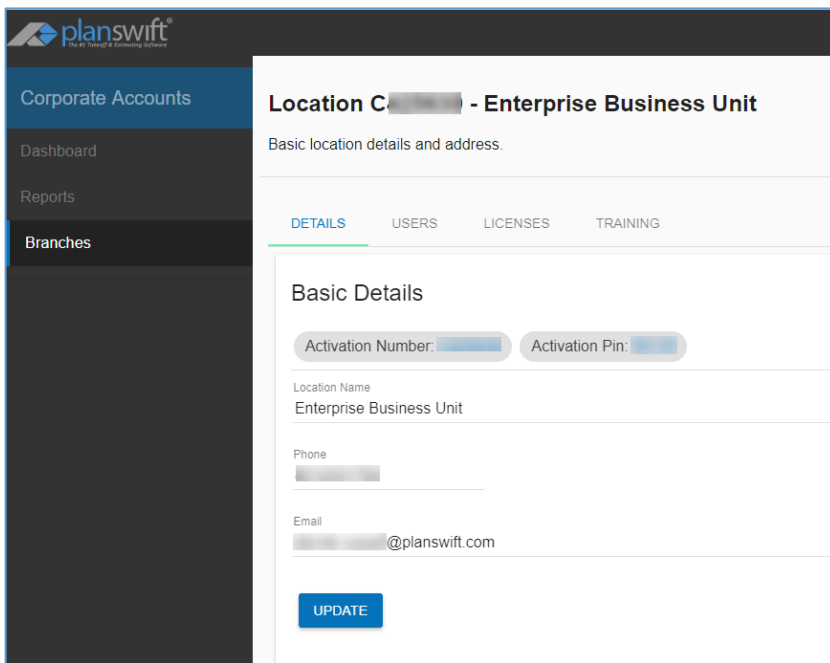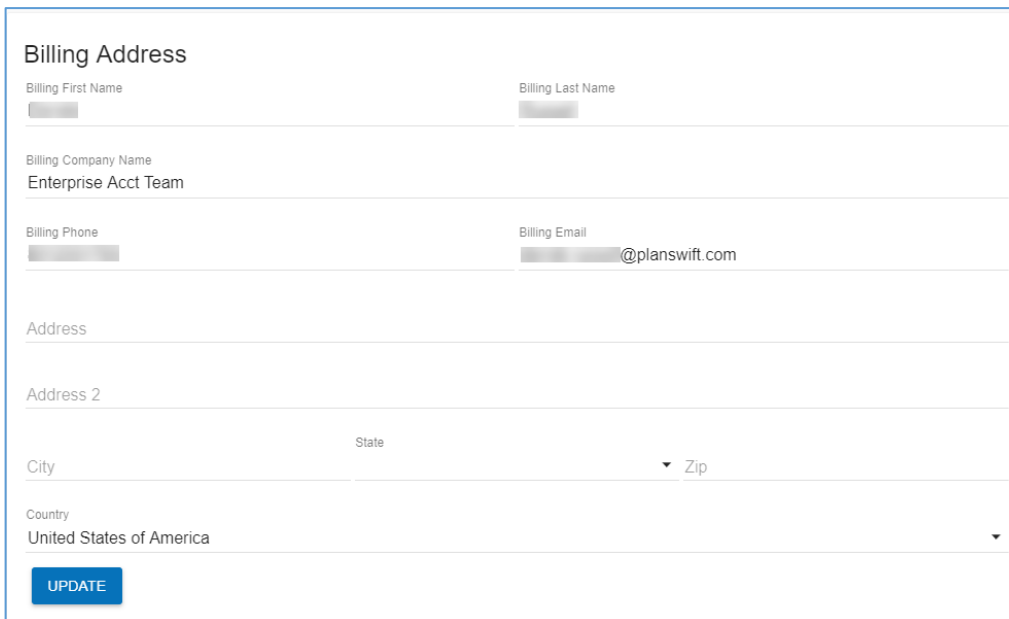

Figure D-1

Editing Branches

Information about a **Branch** includes **Basic Details** (Figure D-2), the **Billing Address** (Figure D-3) and the **Shipping Address** (Figure D-4). Clicking on the **UPDATE** button after making any changes will update the changes.

Figure D-2

Figure D-3

Figure D-4

Editing Features

Adding a New User to a Branch

Clicking on the **USERS** tab shows the **Users** included in a **Branch** (Figure E-1). To add a new **User**, click on the **ADD NEW** button.
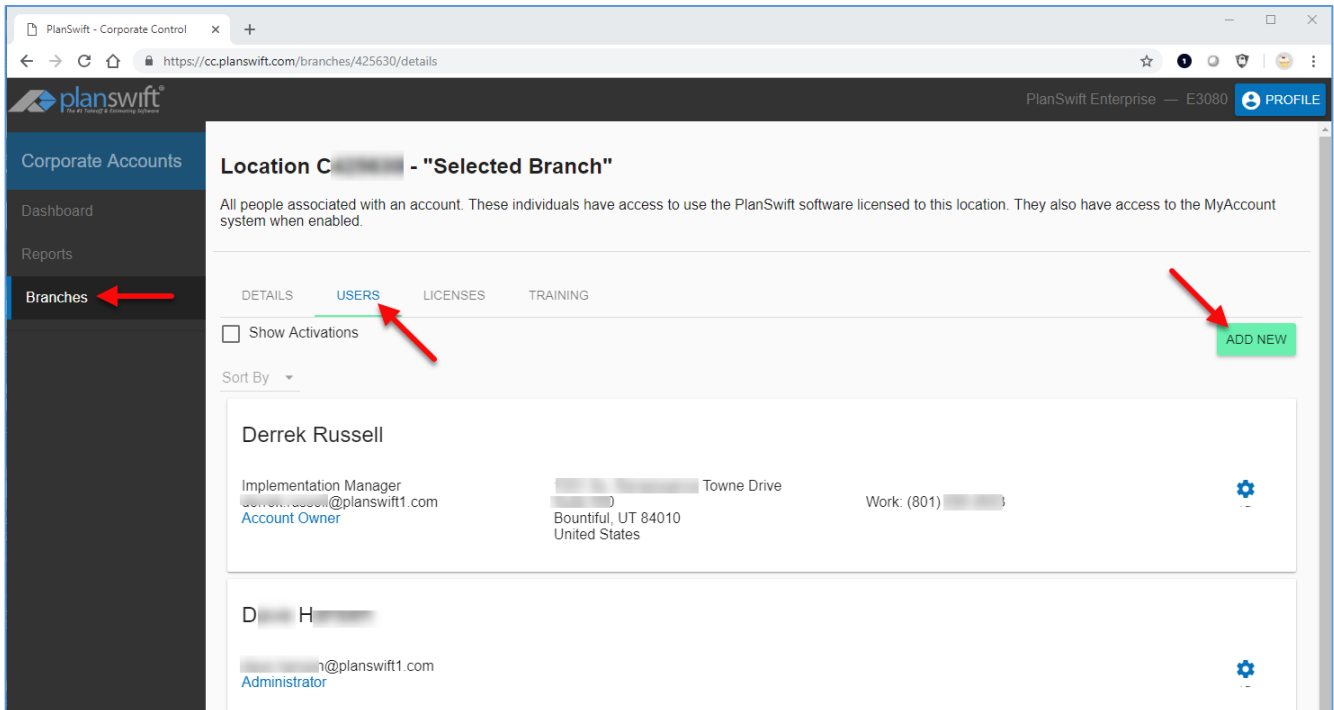
Figure E-1

You can now enter the contact information for the **User** (Figure E-2). To set the **User's** privileges, click on the **Admin Level**. Selecting **Administrator** gives the **User** administrative privileges. Selecting **Enabled** allows the **User** to login and use PlanSwift. Selecting **Disabled** prevents the **User** from logging in and from using PlanSwift and frees up the license. Clicking on **Save** creates the new **User**.

Figure E-2

Editing a User

From the **USERS** tab, clicking on the blue **Gear** button for the desired **User** opens a drop-down menu (Figure E-3).
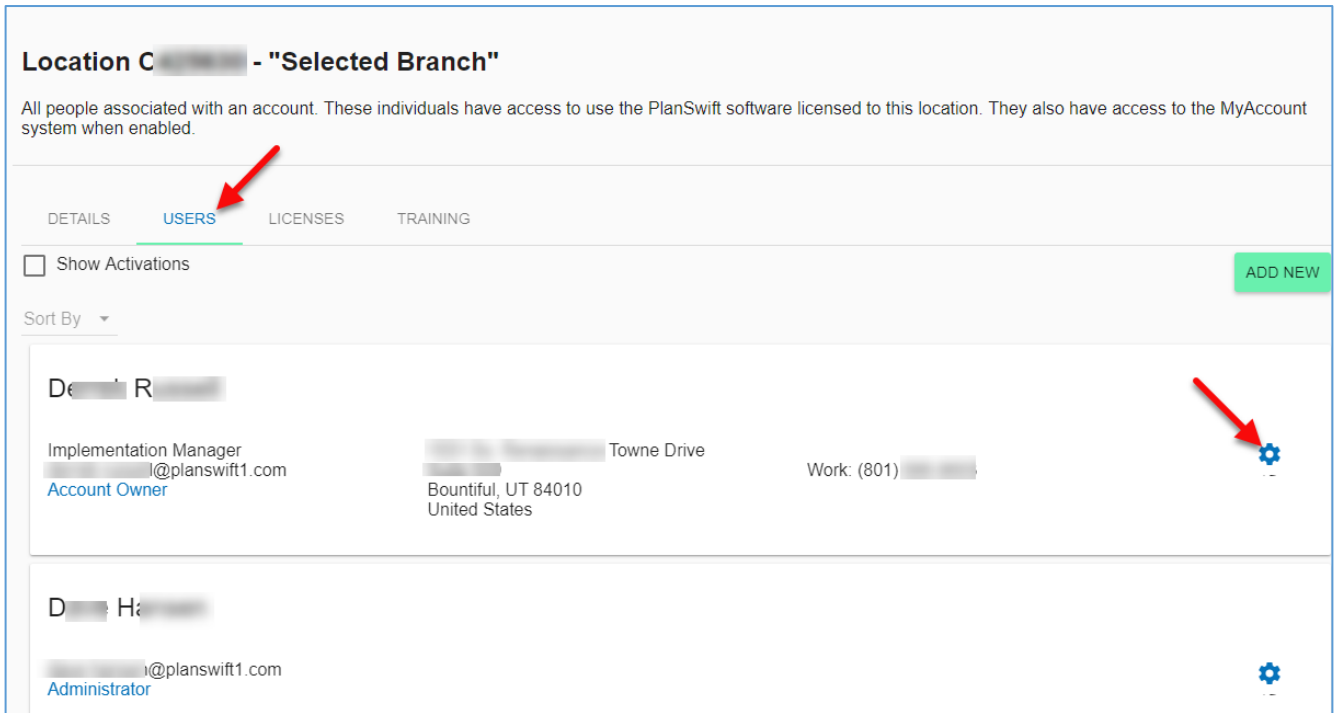
Figure E-3

The drop-down menu selections allow you to **Edit**, **Reset Password**, **Move**, or **Delete** a **User** for the selected **User** (Figure E-4).
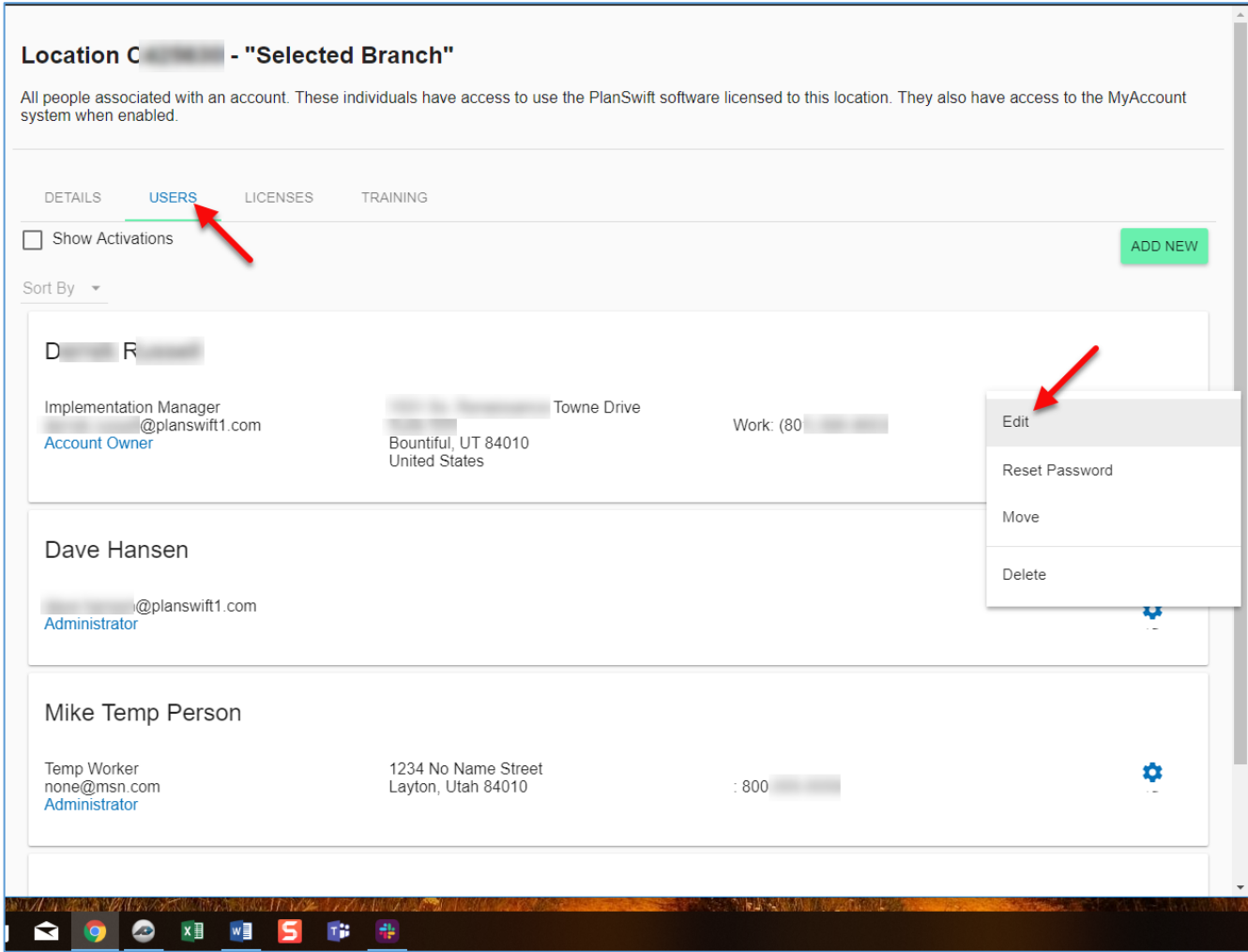
Figure E-4

Clicking on **Edit** from the drop-down menu opens an **Editing Contact** window (Figure E-5). **Contact** information as well as the **Admin Level** can be changed (to give the user administrative privileges and allow you to either enable or disable PlanSwift for the selected **User**).

Figure E-5

Resetting a User's Password

Selecting **Reset Password** from the drop-down menu sends an email to the **User** that has her password reset instructions.
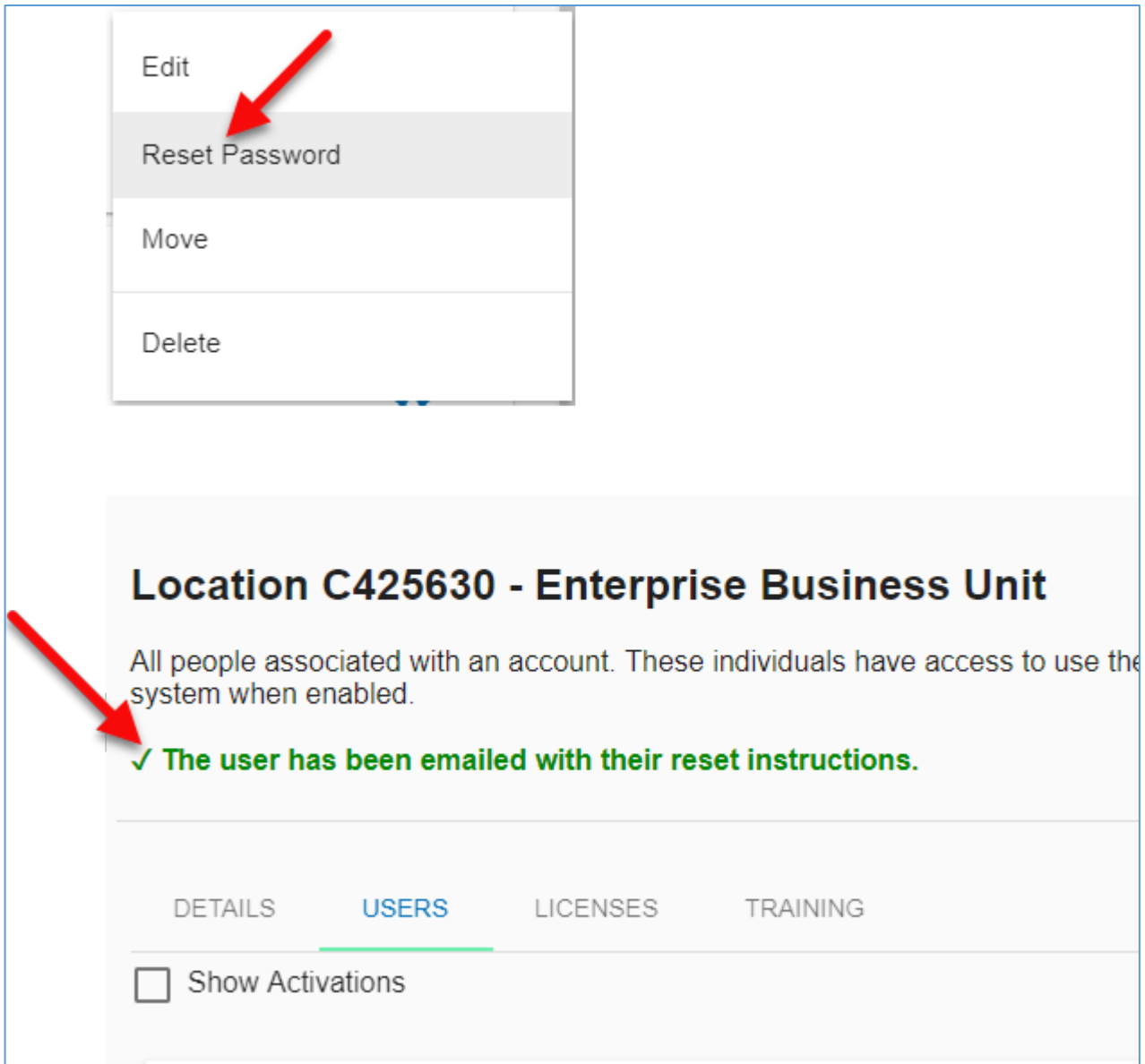
Figure E-6

Moving Users between Branches

Selecting **Move** (arrow 1, Figure E-7) opens a **Moving User** window. Clicking on the drop-down arrow (arrow 2) opens a drop-down list (arrow 3) of other available **Branches**. The **Search** field allows you to type the name of the **Branch** for quicker access. Clicking on a **Branch** moves the **User** into that **Branch**.
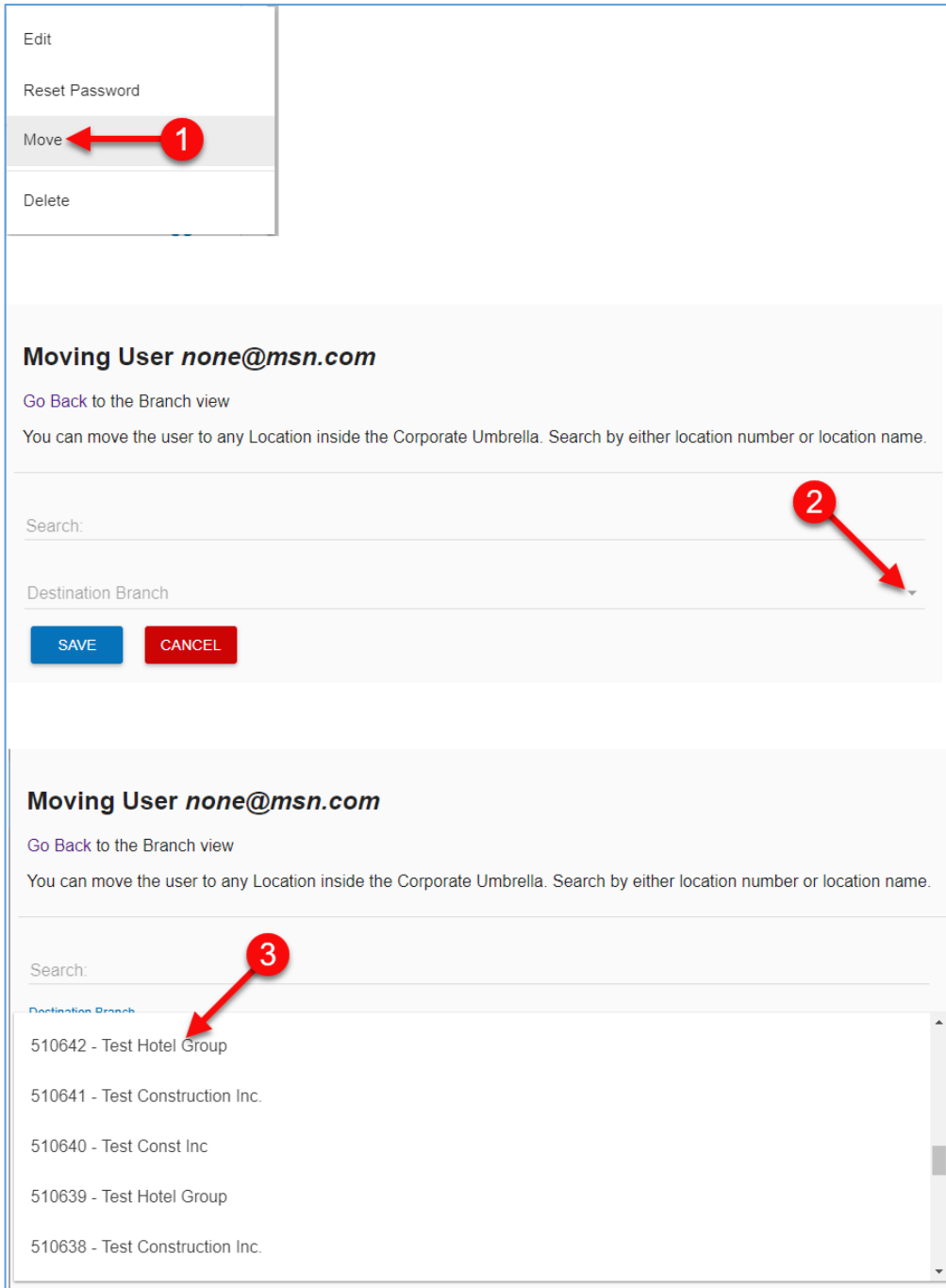
Figure E-7

Deleting a User from a Branch

Selecting **Delete** from the drop-down menu (Figure E-8) asks you to confirm the deletion. Clicking **OK** deletes the **User**.

CAUTION: The **Delete** option removes a user from a **Branch**. If, after deleting a **User**, you want to re-ad her, then you will have to contact PlanSwift Technical Support.
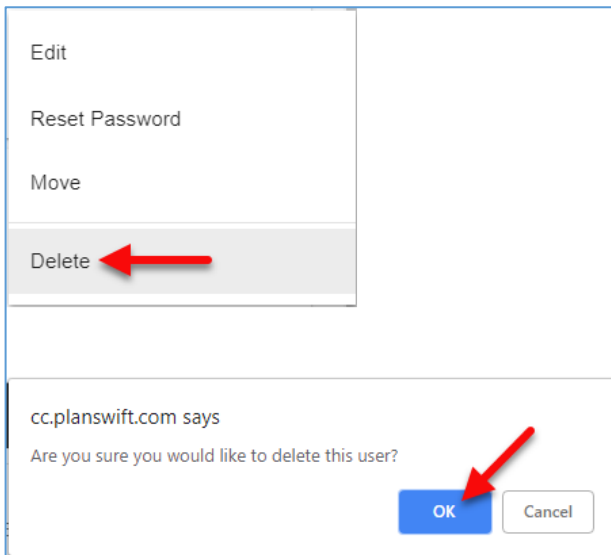
Figure E-8

Enabling a User

Users may be enabled from the **USERS** tab. Click on the blue **Gear** button for the User that needs to be enabled, and then select **Edit** from the drop-down menu (Figure E-9).

Figure E-9

Clicking on the **Admin Level** field opens a drop-down menu (Figure E-12).

Figure E-10

From the drop-down menu, you can now select **Enabled** for the **User** (Figure E-11). Selecting **Enabled** and clicking on the **Save** button completes the change.
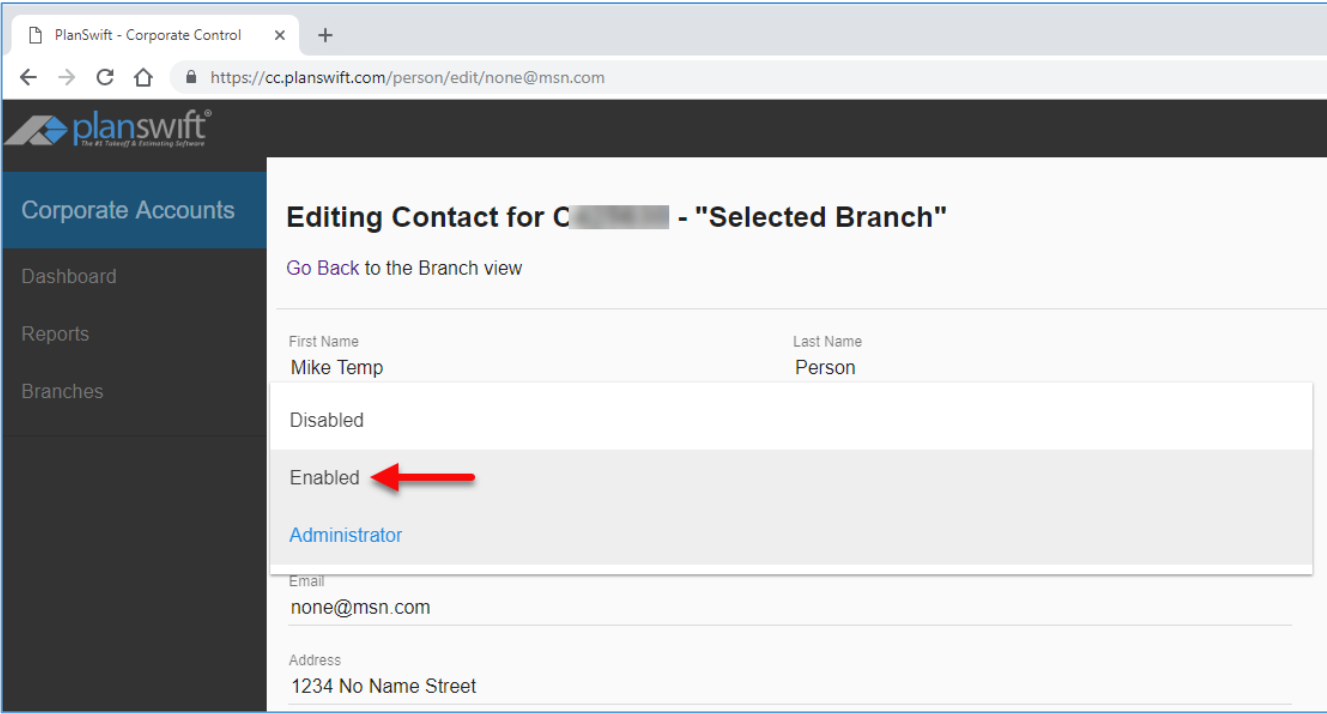
Figure E-11

Disabling a User

Users may be disabled from the **USERS** tab. Click on the blue **Gear** button for the **User** that needs to be enabled, and then select **Edit** from the drop-down menu.
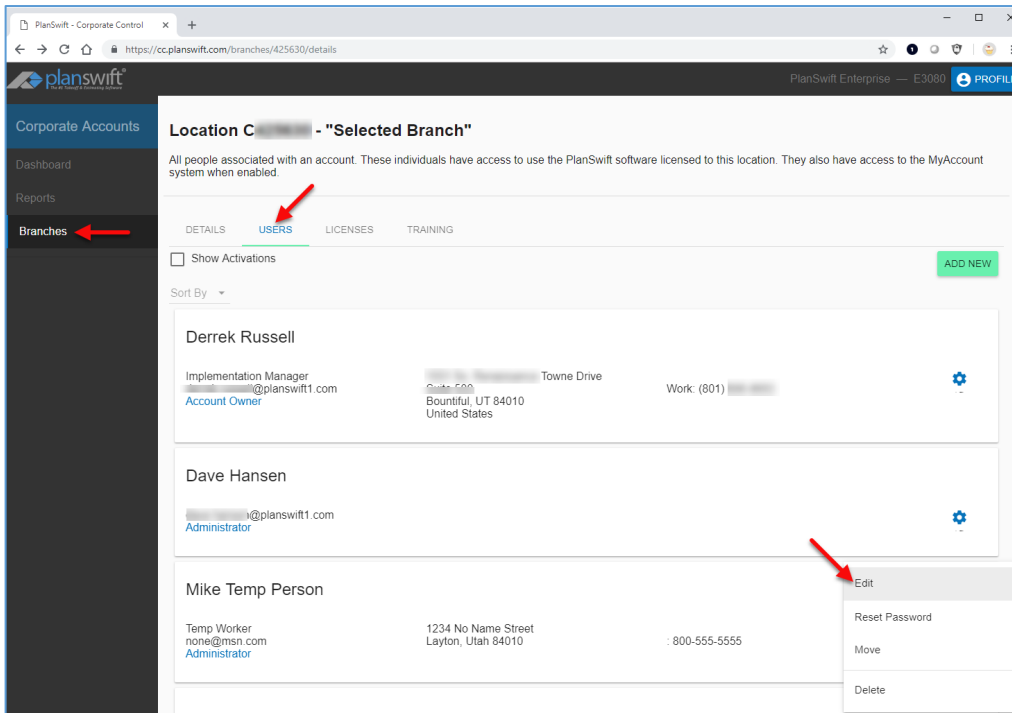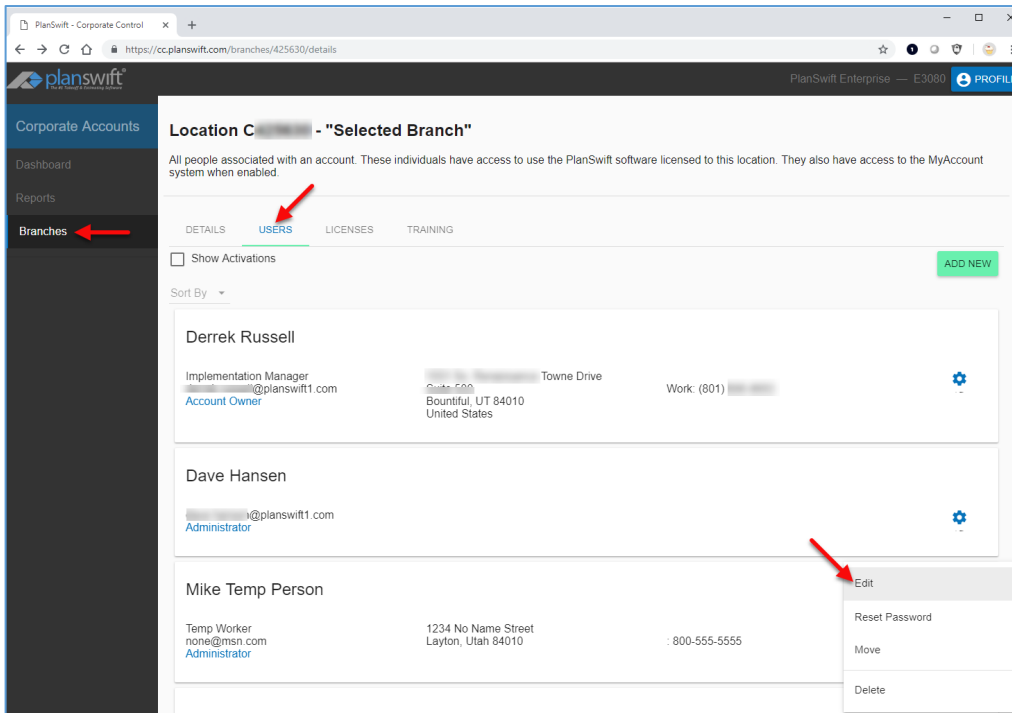

Figure E-12

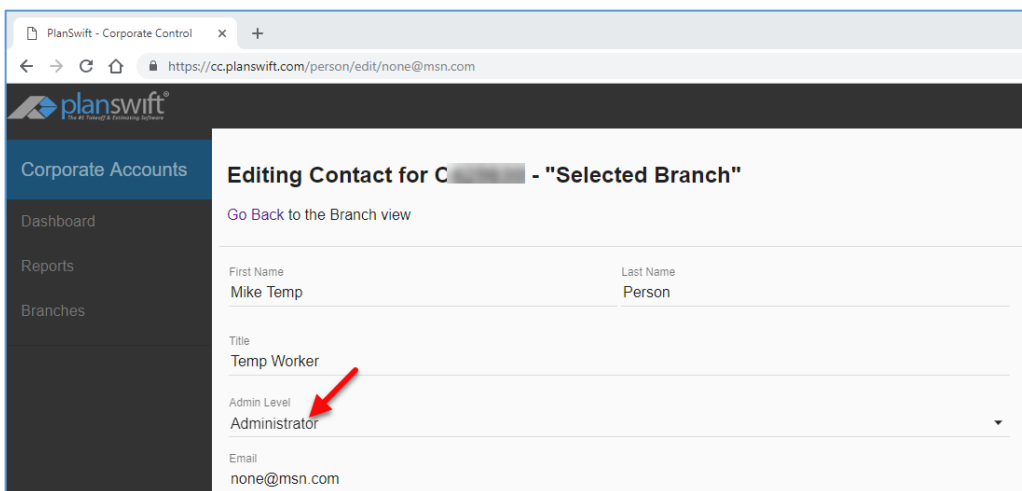Clicking on the **Admin Level** field opens a drop-down menu (Figure E-13).
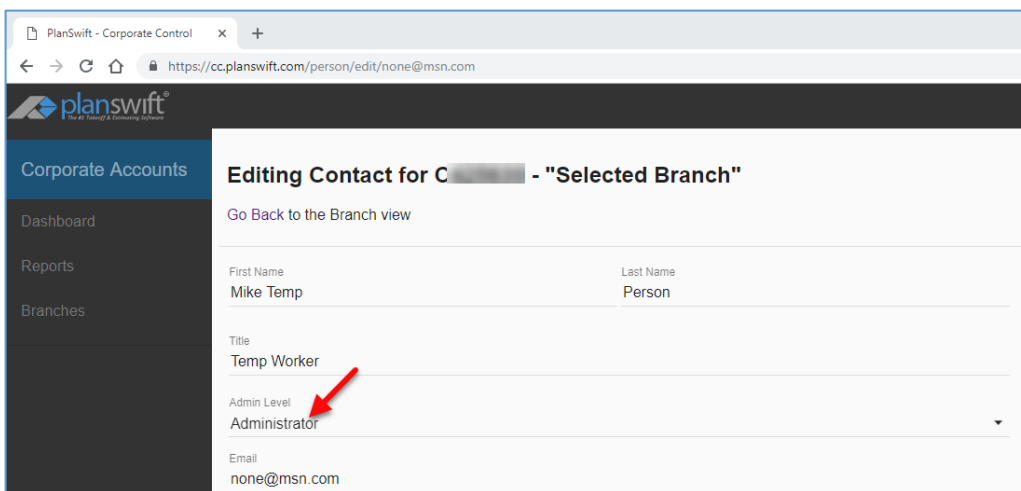
Figure E-13

From the drop-down menu, you can now select **Disabled** for the **User** (Figure E-14). Selecting **Disabled** and clicking on the **Save** button completes the change.

Editing Contact for C425630 - "Selected Branch"

Go Back to the Branch view

First Name
Mike Temp

Last Name
Person

Disabled ←

Enabled

Administrator

Email
none@msn.com

Address
1234 No Name Street

Figure E-14

Giving Administrative Privileges

Users may be given Administrative privileges from the **USERS** tab. Click on the blue **Gear** button for the **User** that needs to be given Administrative privileges, and then select **Edit** from the drop-down menu.

Figure E-15

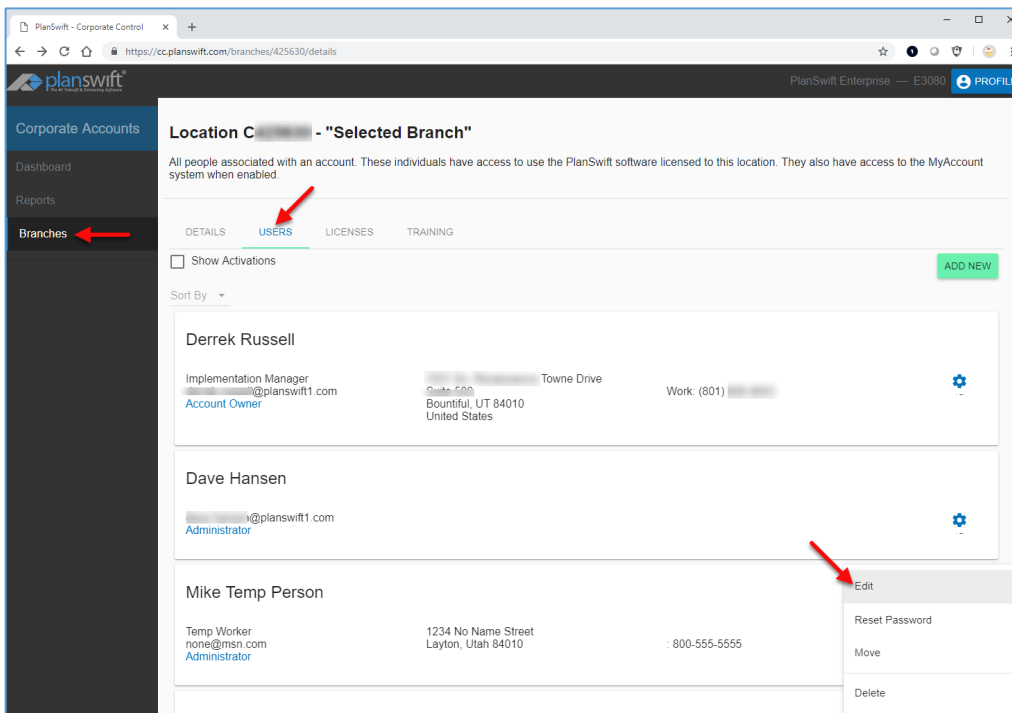Clicking on the **Admin Level** field opens a drop-down menu (Figure E-16). Selecting **Administrator** and clicking on the **Save** button completes the change.
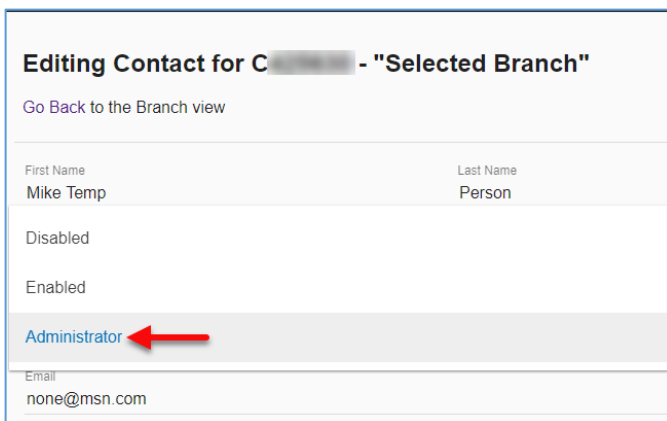

Figure E-16

Adding a New License

New **Licenses** can be added under the **LICENSES** tab (Figure F-1). Licenses can be filtered or sorted (just like **Branches**) by clicking on the column headers (**Software Licenses**, **Type**, and **Expires**). Clicking on the **ADD NEW LICENSE** button opens the **Give a new license to Enterprise Business Unit** window.
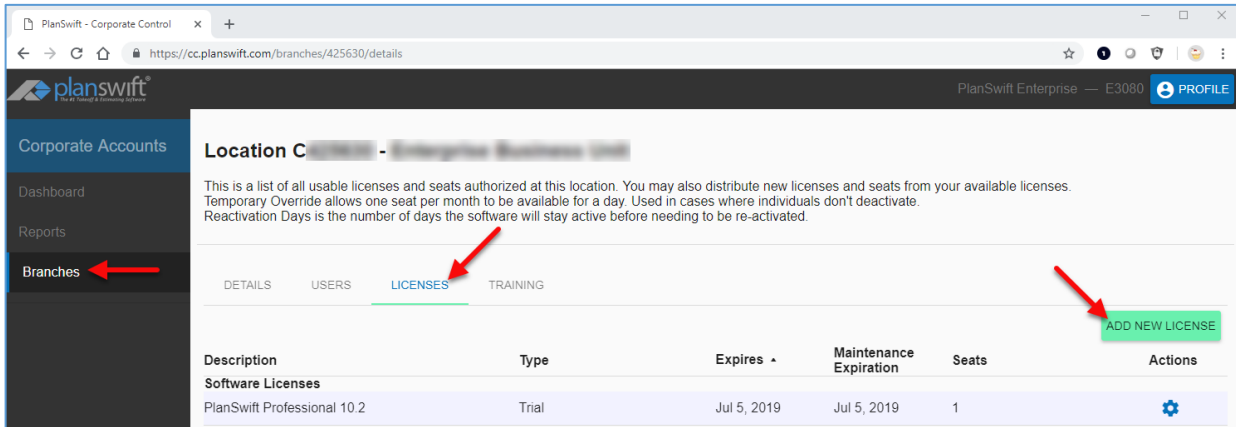
Figure F-1

This **Give a new license** window allows you to select the **License Edition** and the **License Type** to give. Clicking on the down-arrow for **Edition to give** opens a drop-down with the available license editions. The **Version of Edition** is not implemented at this time. Clicking on the **License Type** down-arrow opens a drop-down menu allowing you to select whether the **License** was procured via a **Purchase** or a **Subscription**. The **Seats Available** field allows you to enter the number of **Seats** assigned to the **Branch**.

Figure F-2

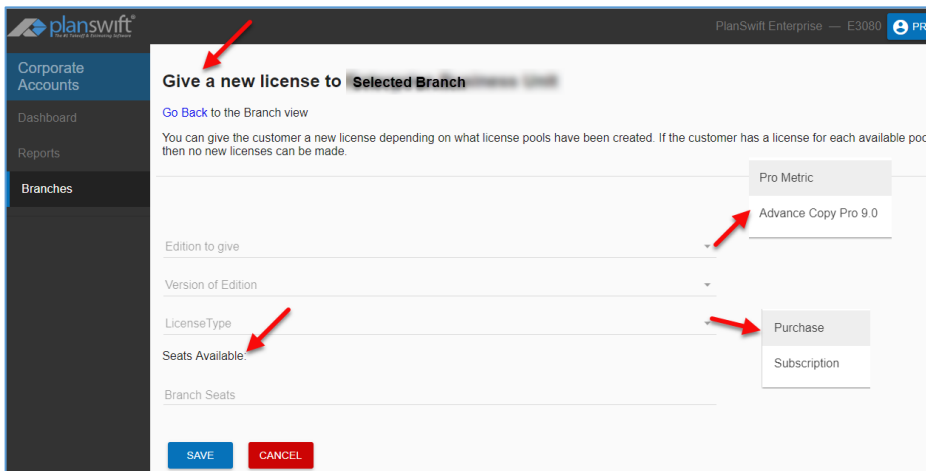# Reallocating Seats

If seats are available, they may be reallocated by clicking on the number of Seats number (Figure F-3). That opens the "Adjust Seats for 'Professional' window where seats can be added or removed. Click on the up/down arrows and enter the number of seats to be added or removed, and then click on the **ADD** or **REMOVE** button.
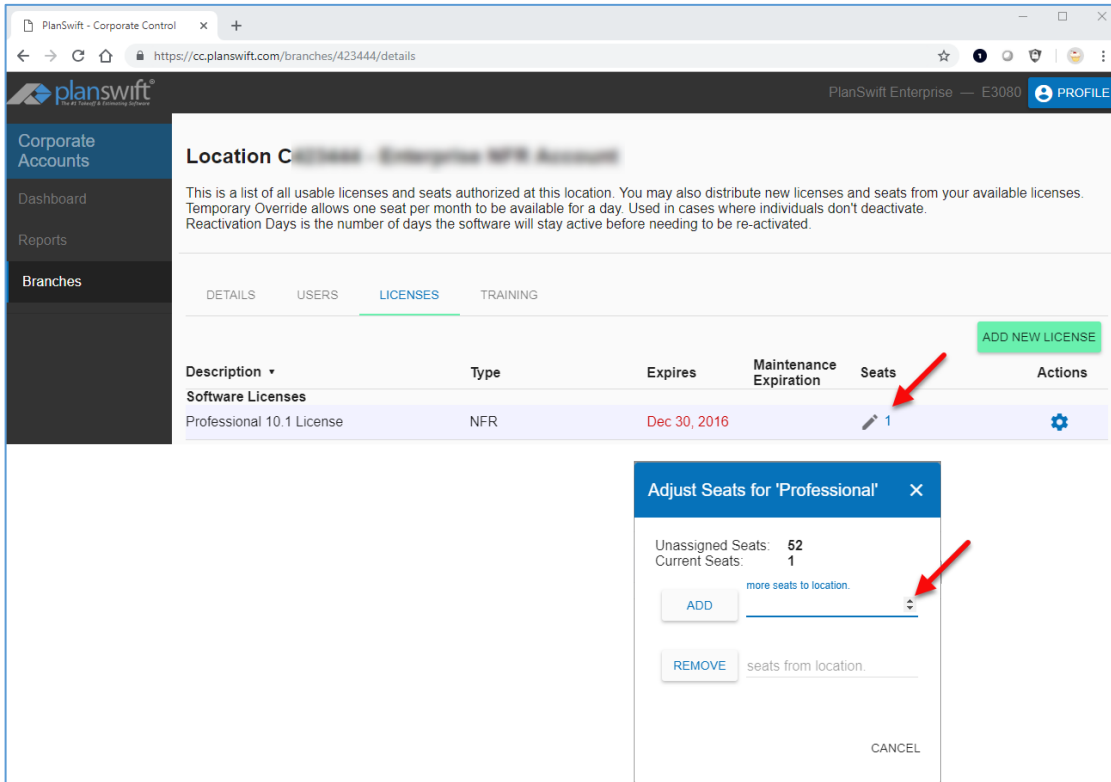

Figure F-3

Downloading PlanSwift from Corporate Control

Clicking on the blue Action **Gear** opens a drop-down menu (Figure F-4), which allows you to **Download** PlanSwift.
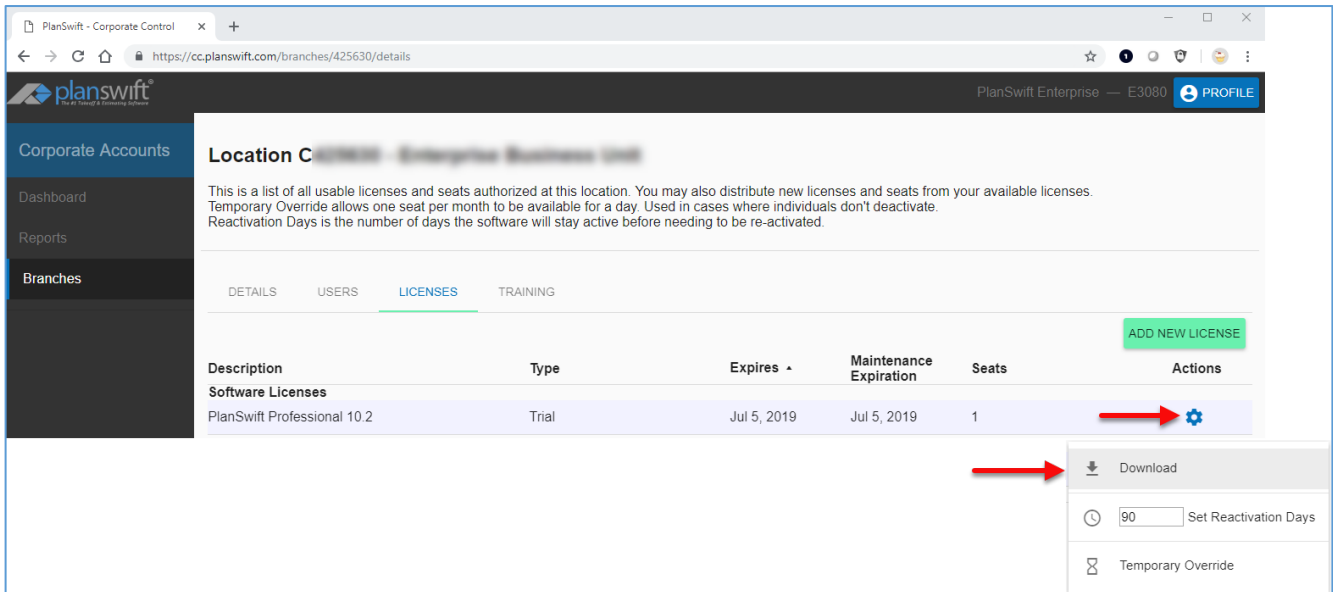

Figure F-4

Setting the Number of Days between Reactivations

The blue **Gear** drop-down menu in Figure F-4 allows you to set the number of days to when PlanSwift must be **Reactivated**. Simply enter a number between 1 and 90 to set the value.

Temporary Override of Activations

The blue **Gear** drop-down menu in Figure F-4 also allows you to click on **Temporary Override** to temporarily override a license deactivation if activation cannot occur. Temporary overrides are permitted only once per seat per month.

Nuking (Resetting) Users

The **Nuke** option is used to deactivate a user's license. The **Nuke** option is available by selecting the **Branches** tab, then the **Branch Name** (Figure F-5).
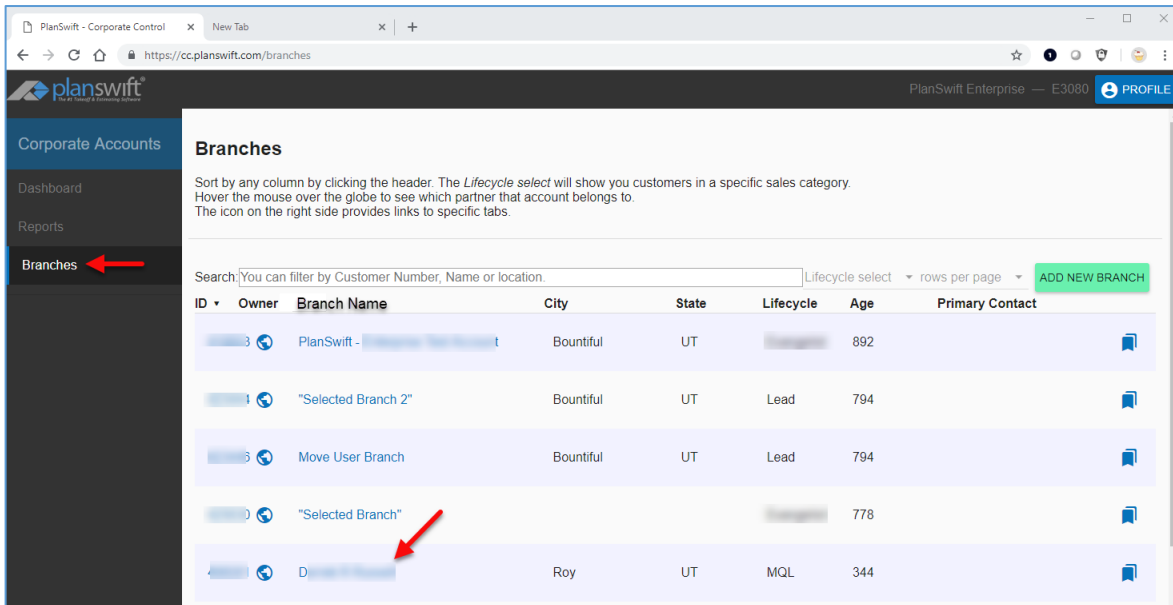

Figure F-5

Clicking on the **LICENSES** tab opens the license information for the **Owner Name** (Figure F-6). Clicking the down-arrow displays the licensing information as well as the **Nuke** option. Clicking on **Nuke** resets it with no further warning.
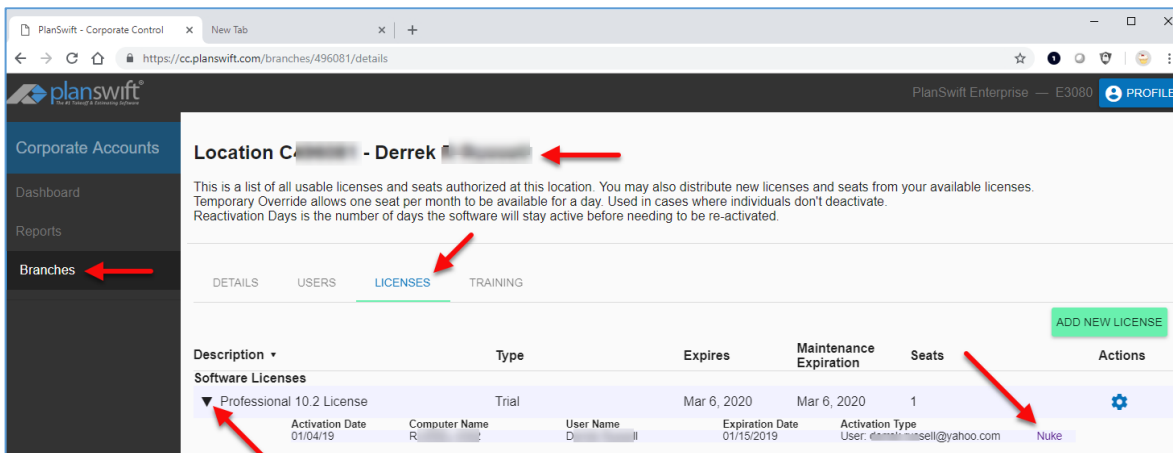

Figure F-6