



planswift<sup>®</sup> pro  
by ConstructConnect

# Corporate Control User Guide

Updated on 2/1/2019

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## Overview

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

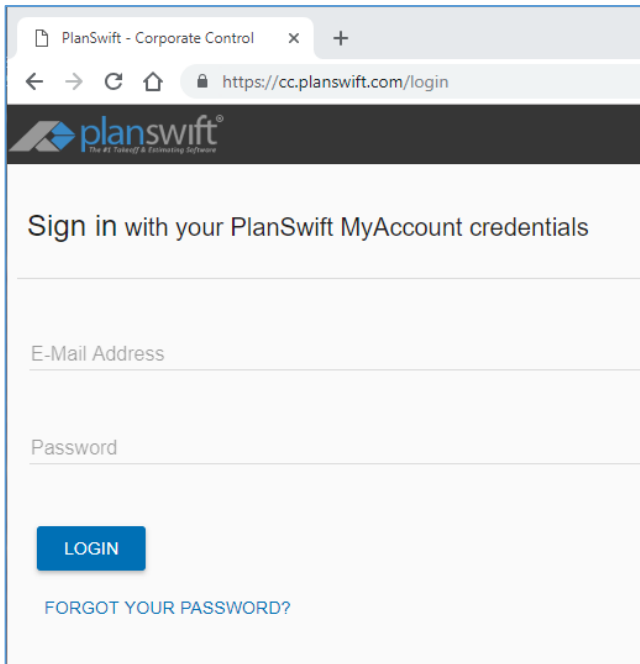
- Logging in
- Viewing and downloading User Summary, License Distribution, and Training Distribution Reports
- Viewing Branches
- Creating Branches
- Adding Users
- Moving Users from one Branch to another
- Viewing Activation Status
- Viewing Licensing Status
- Nuking Users.

## 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>

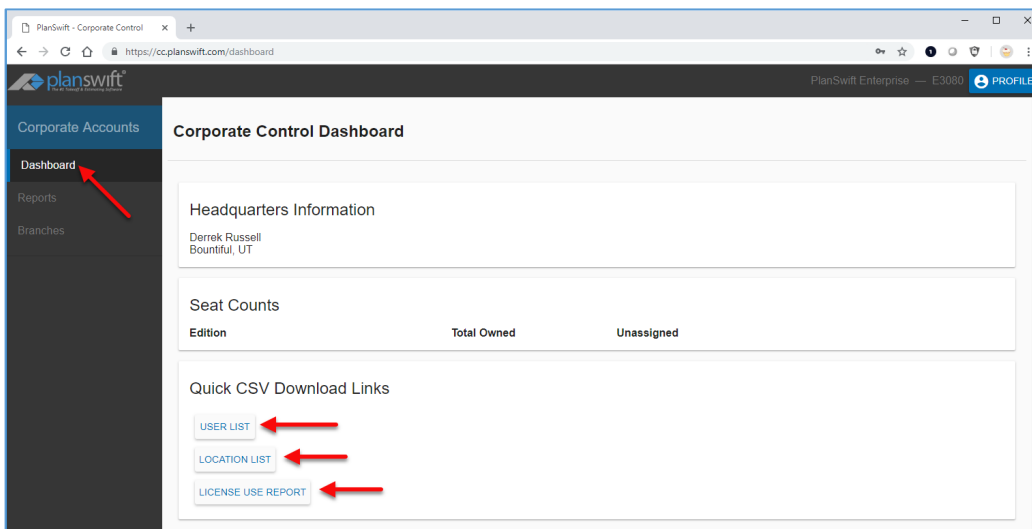
Figure A-1 shows the login window. Use the credentials (**E-Mail Address** and **Password**) your administrator provided you to log in. Click on **FORGOT YOUR PASSWORD** if you have forgotten your password, and you will receive an email allowing you to reset your password.



**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**

	A	B	C	D	E	F
1	LocationName	LocationID	Name	email	phone	AccessLevel
2	Enterprise NFR Account	423444	Naveen Hossain	hossain.naveen@gmail.com	8887526794	Administrator
3	Enterprise NFR Account	423446		moshnee@hotmail.com	(888) 752-6794	Administrator
4	Enterprise Business Unit	425630		entadmin@planswift.com		Enabled
5	PlanSwift - Enterprise Test Acc	410653		markham.caldwell@planswift.com	3854243900	Administrator
6	Enterprise Business Unit	425630	Derrek Russell	derrek.russell@planswift1.com	(801) 896-9683	Account Owner
7	Test Construction Inc.	510629	B E	test@uniqueemailaddress.COM	555-555-5555	Enabled
8	Test Hotel Group	510630	B F	test@testsite.com	555-555-5555	Enabled
9	Derrek R Russell	496081		derrek.russell@yahoo.com		Enabled
10	Enterprise Business Unit	425630	Dave Hansen	dave.hansen@planswift1.com		Administrator

Figure A-3

	A	B	C	D	E	F	G
1	LocationID	Name	City	State	Age	ContactName	ContactPhone
2	510681	Test Hotel Group	Cody	WY	23	Name 1	435-555-1234
3	510680	Test Construction Inc.	Cheyenne	WY	54	Name 2	435-555-1234
4	510679	Test Const Inc	Cheyenne	WY	15	Name 3	435-555-1234
5	510678	Test Hotel Group	Cody	WY	15	Name 4	435-555-1234
6	510677	Test Construction Inc.	Cheyenne	WY	15	Name 1	435-555-1234
7	510676	Test Const Inc	Cheyenne	WY	15	Name 2	435-555-1234
8	510657	Test Hotel Group	Cheyenne	WY	15	Name 3	435-555-1234
9	510656	Test Construction Inc.	Cody	WY	15	Name 4	435-555-1234
10	510655	Test Const Inc	Cheyenne	WY	15	Name 1	435-555-1234
11	510654	Test Hotel Group	Cheyenne	WY	15	Name 2	435-555-1234
12	510653	Test Construction Inc.	Cheyenne	WY	15	Name 3	435-555-1234
13	510652	Test Const Inc	Cheyenne	WY	15	Name 4	435-555-1234
14	510651	Test Hotel Group	Cheyenne	WY	15	Name 1	435-555-1234
15	510650	Test Construction Inc.	Evanston	WY	15	Name 2	435-555-1234
16	510649	Test Const Inc	Cody	WY	15	Name 3	435-555-1234
17	510648	Test Hotel Group	Evanston	WY	15	Name 4	435-555-1234
18	510647	Test Construction Inc.	Evanston	WY	15	Name 1	435-555-1234

Figure A-4

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	CustomerID	CustomerName	LicenseID	LicenseDescription	SeatsUsed	LicenseSeats	LicenseType	LicenseExpireDate	MaintenanceExpireDate	ActivationID	ActivationComputerID	ActivationCom	ActivationUser	ActivationDate	ActivationExpireDate	ActivationEmail		
2	496081	Derrek R Russell	1000486068	Professional 10.2 License	1	1	Trial	3/7/2020 0:00	3/7/2020 0:00	5281570	6632-23-2255	RUSSEL-0082	Derrek.Russell	1/4/2019	1/15/2019	derrek.russell@yahoo.com		
3																		

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.

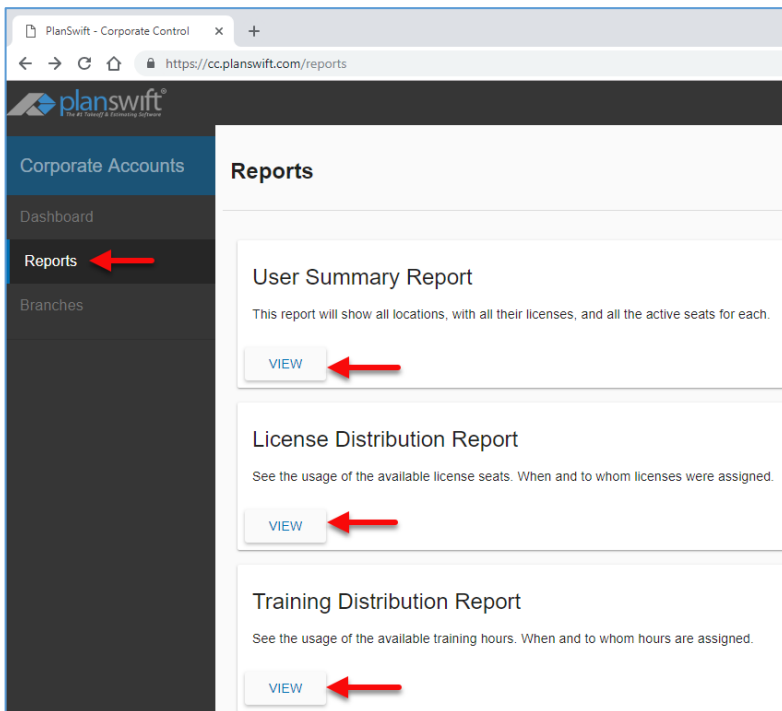


Figure B-1

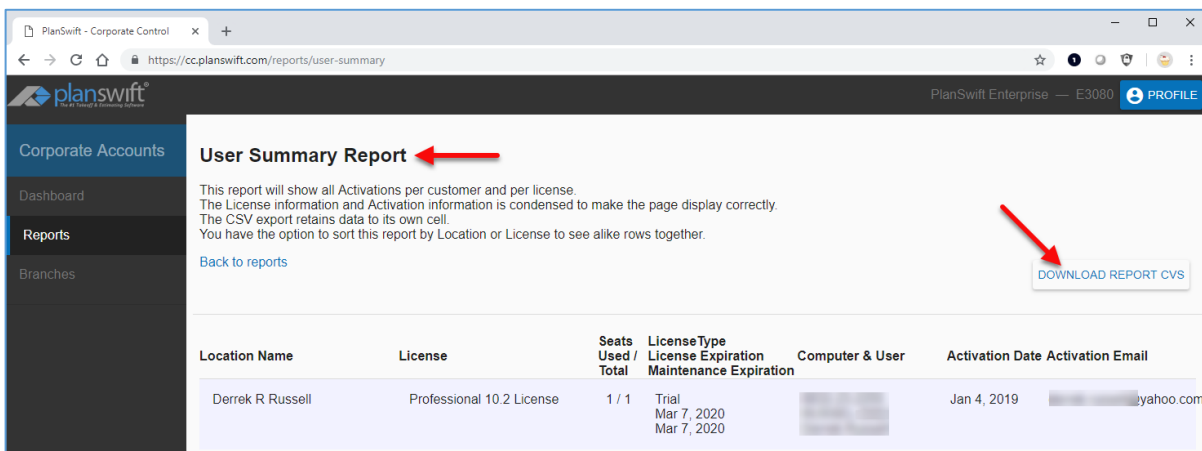


Figure B-2

- **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.

The screenshot displays the PlanSwift Corporate Control interface. The left sidebar contains navigation options: Corporate Accounts, Dashboard, Reports, and Branches. The main content area is titled "License Distribution Report" and includes a "DOWNLOAD REPORT CVS" button. Below the title, there are filters for "Edition", "Start Date", and "End Date". A table lists license distribution events with columns for Edition, Location, Change, Available, Time, Note, and User.

Edition	Location	Change	Available	Time	Note	User
Pro Metric	PlanSwift - Enterprise Test Account	-1	0	Jan 04, 2019 12:29	1 seats given to location	Mark
Professional	PlanSwift - Enterprise Test Account	-1	2	Jan 04, 2019 12:30	1 seats given to location	Mark
Professional	"Selected Branch 2"	50	52	Jan 04, 2019 12:34	Because	Mark
Professional	"Selected Branch 2"	-1	51	Jan 30, 2019 17:51	1 seats given to location	Dave

**Figure B-3**

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





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

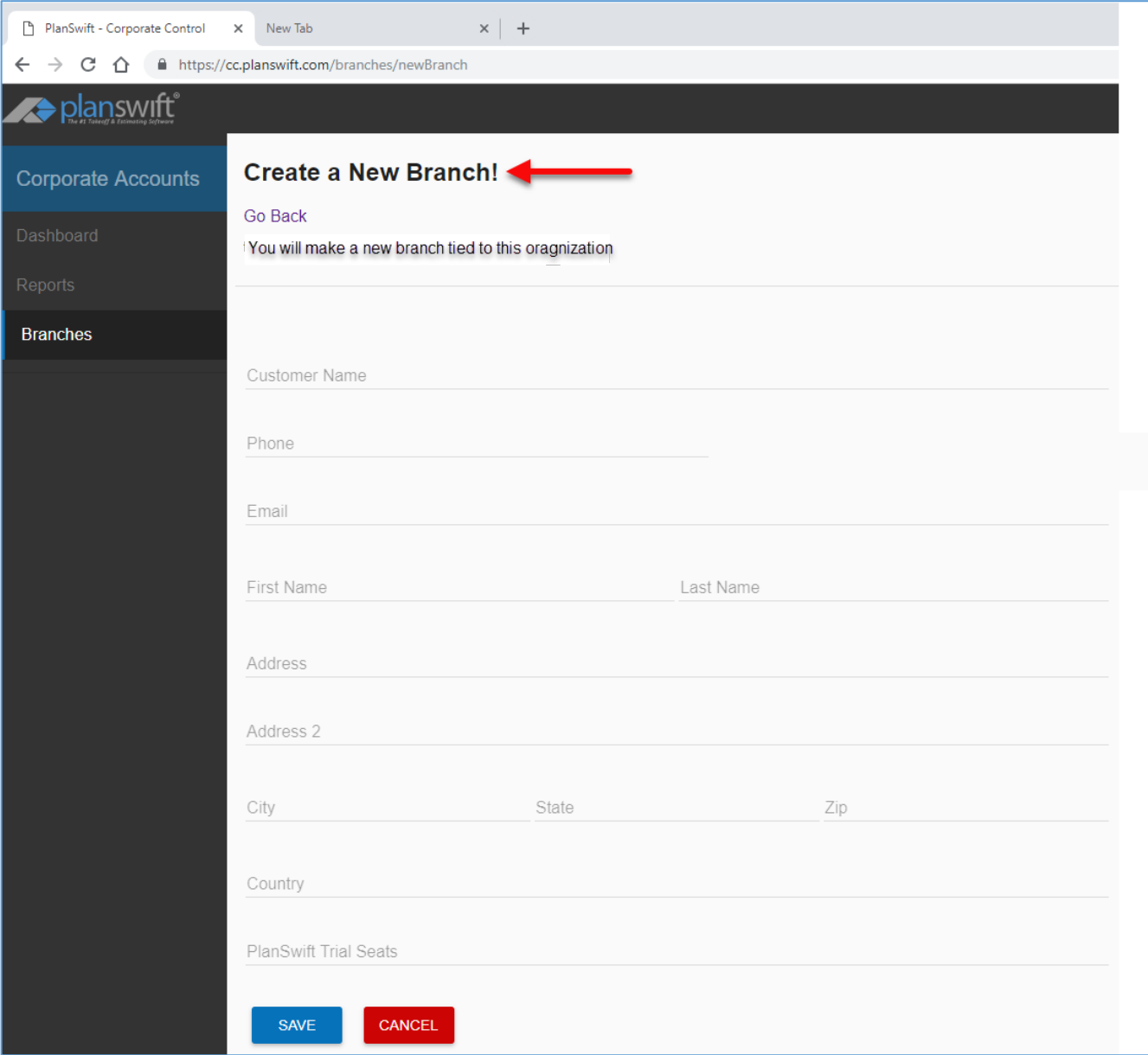


Figure C-2

# 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.

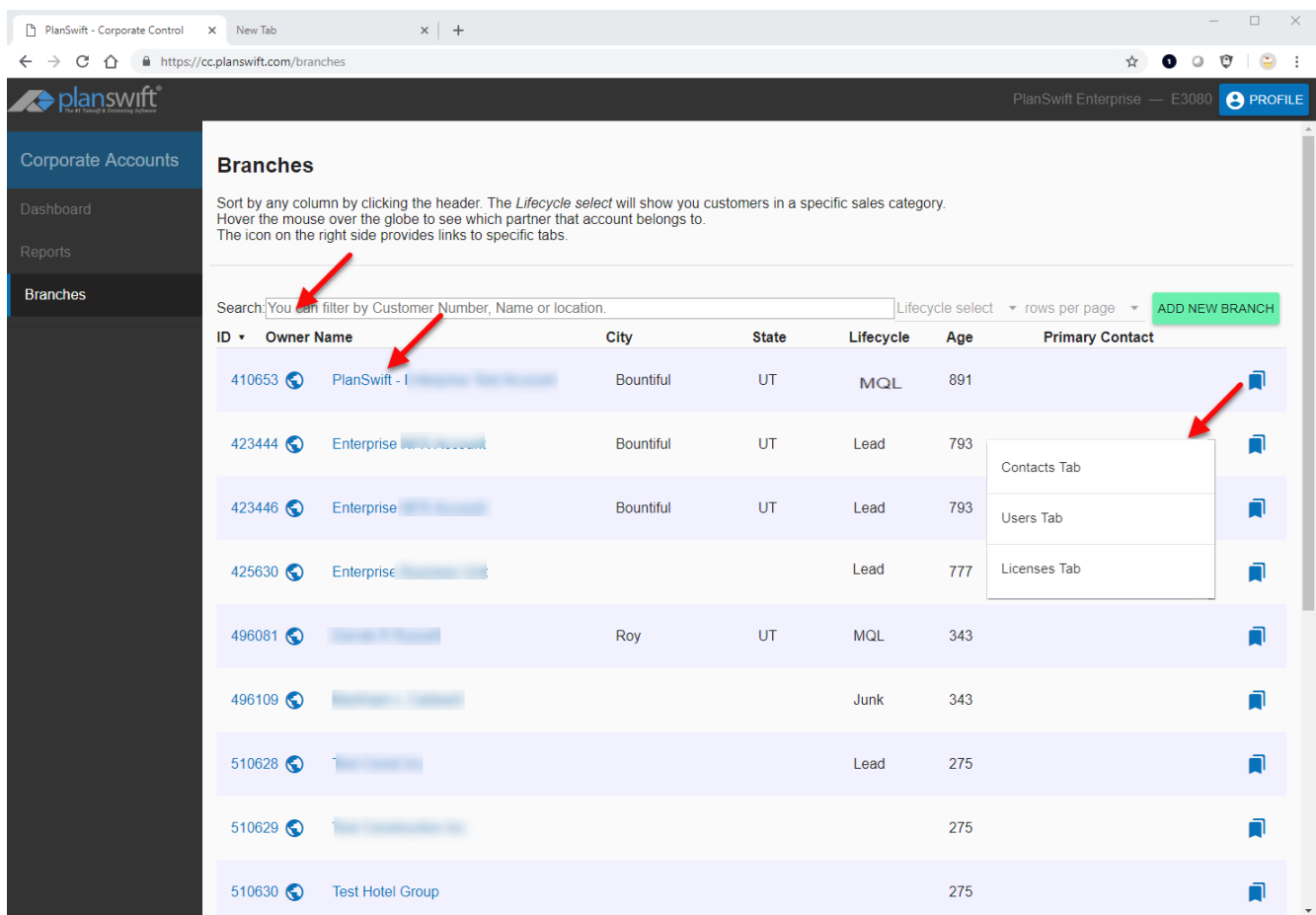
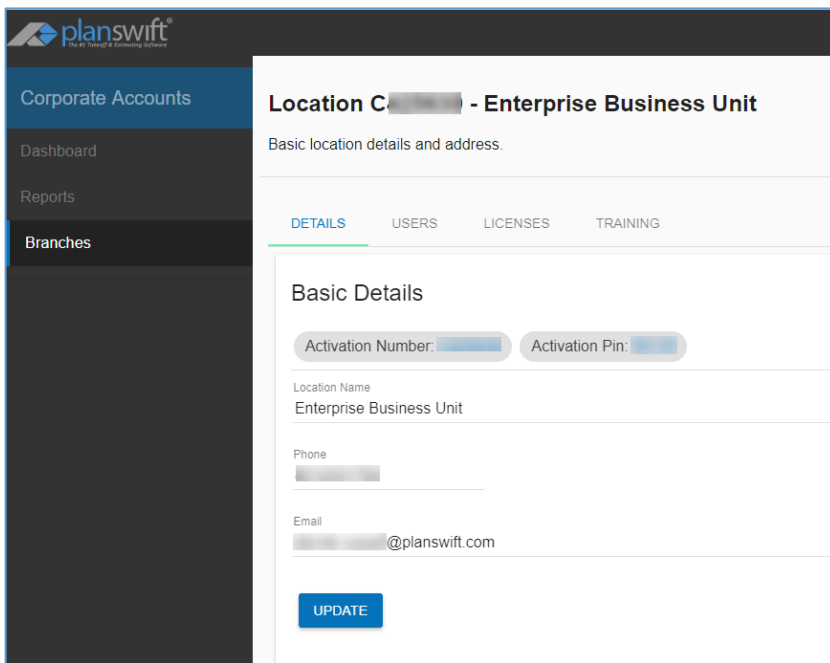


Figure D-1

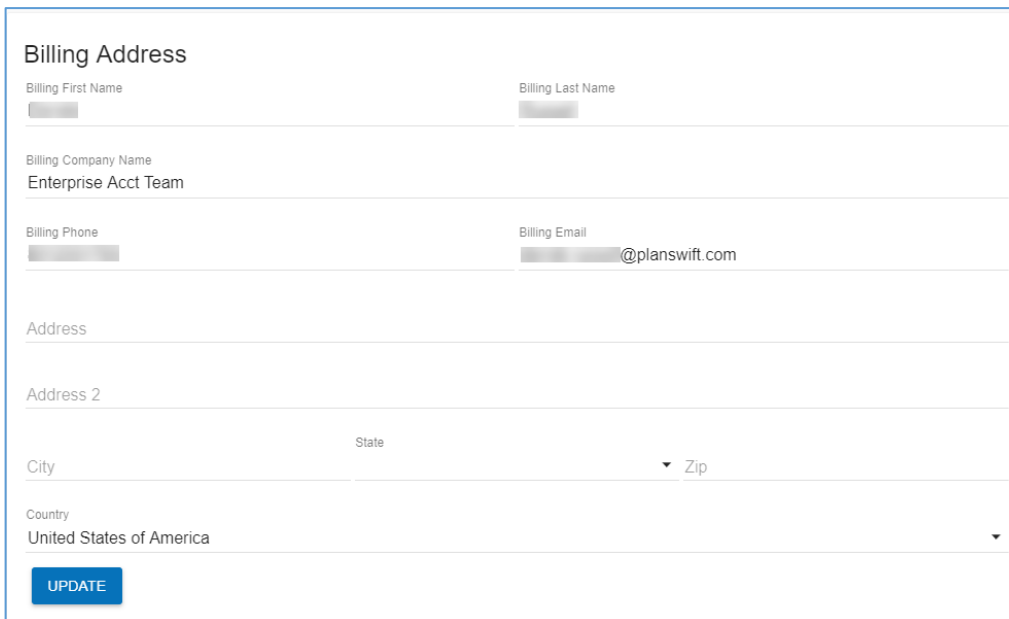
# Editing Branches

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.



The screenshot shows the 'planswift' logo at the top left. A sidebar on the left contains navigation links: 'Corporate Accounts', 'Dashboard', 'Reports', and 'Branches'. The main content area is titled 'Location C[REDACTED] - Enterprise Business Unit' and includes the subtitle 'Basic location details and address.' Below this are tabs for 'DETAILS', 'USERS', 'LICENSES', and 'TRAINING'. The 'DETAILS' tab is active, showing a 'Basic Details' section with the following fields: 'Activation Number' and 'Activation Pin' (both with input fields), 'Location Name' (Enterprise Business Unit), 'Phone' (with a redacted input field), and 'Email' (with a redacted input field ending in '@planswift.com'). A blue 'UPDATE' button is located at the bottom of the form.

Figure D-2



The screenshot shows the 'Billing Address' form with the following fields: 'Billing First Name' (redacted), 'Billing Last Name' (redacted), 'Billing Company Name' (Enterprise Acct Team), 'Billing Phone' (redacted), and 'Billing Email' (redacted with '@planswift.com'). Below these are three address lines: 'Address', 'Address 2', and 'City'. The 'City' field is followed by a 'State' dropdown menu and a 'Zip' field. The 'Country' field is set to 'United States of America' with a dropdown arrow. A blue 'UPDATE' button is at the bottom left of the form.

Figure D-3

Shipping Address

Shipping Company Name

Shipping First Name Shipping Last Name

Address

Address 2

City State Zip

Country

UPDATE

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.

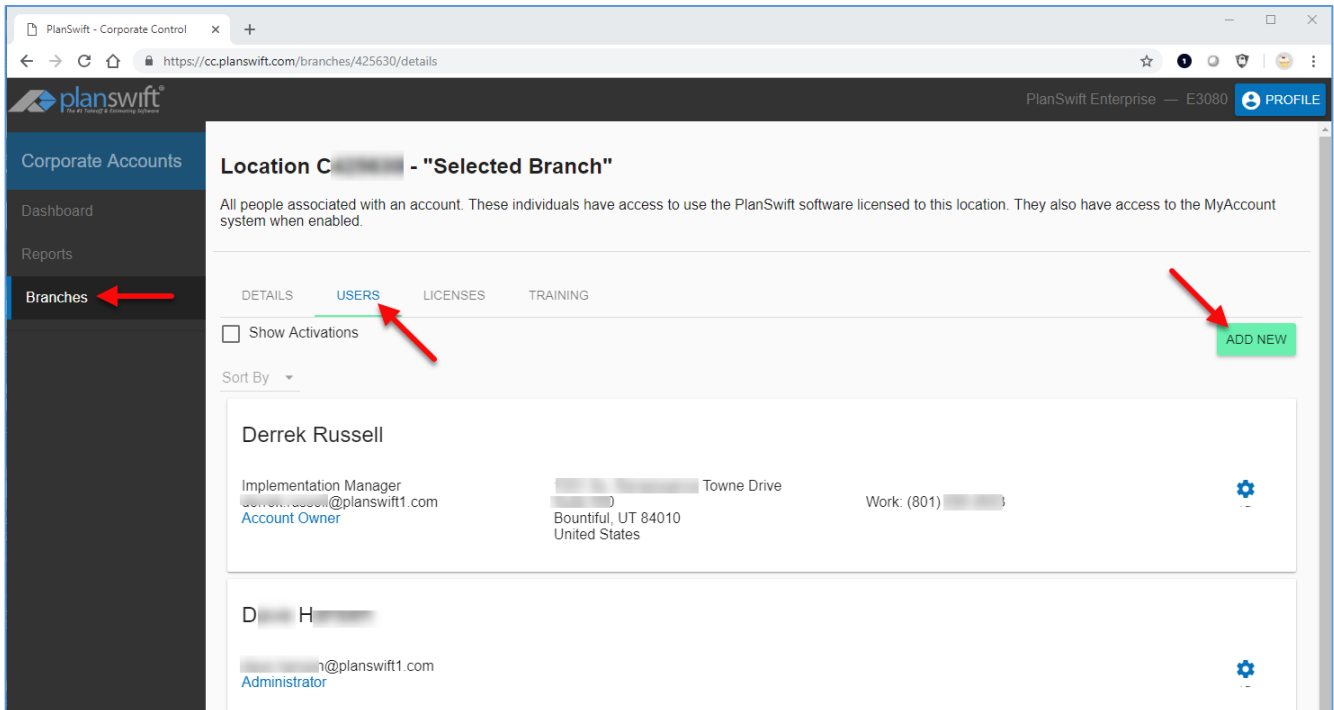


Figure E-1

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**.

The screenshot shows a web browser window with the URL <https://cc.planswift.com/person/new/410653>. The page title is "Editing Contact for C410653 - PlanSwift - Enterprise Test Account". The left sidebar contains navigation links: Corporate Accounts, Dashboard, Reports, and Branches. The main content area has a "Go Back to the Branch view" link. The form fields are: First Name, Last Name, Title, Admin Level (set to Administrator), Enabled (set to Enabled), Email, Address, Address 2, City, State, Zip, and three Phone Number fields. A red arrow points to the "Admin Level" dropdown menu, and another red arrow points to the "SAVE" button at the bottom left.

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).

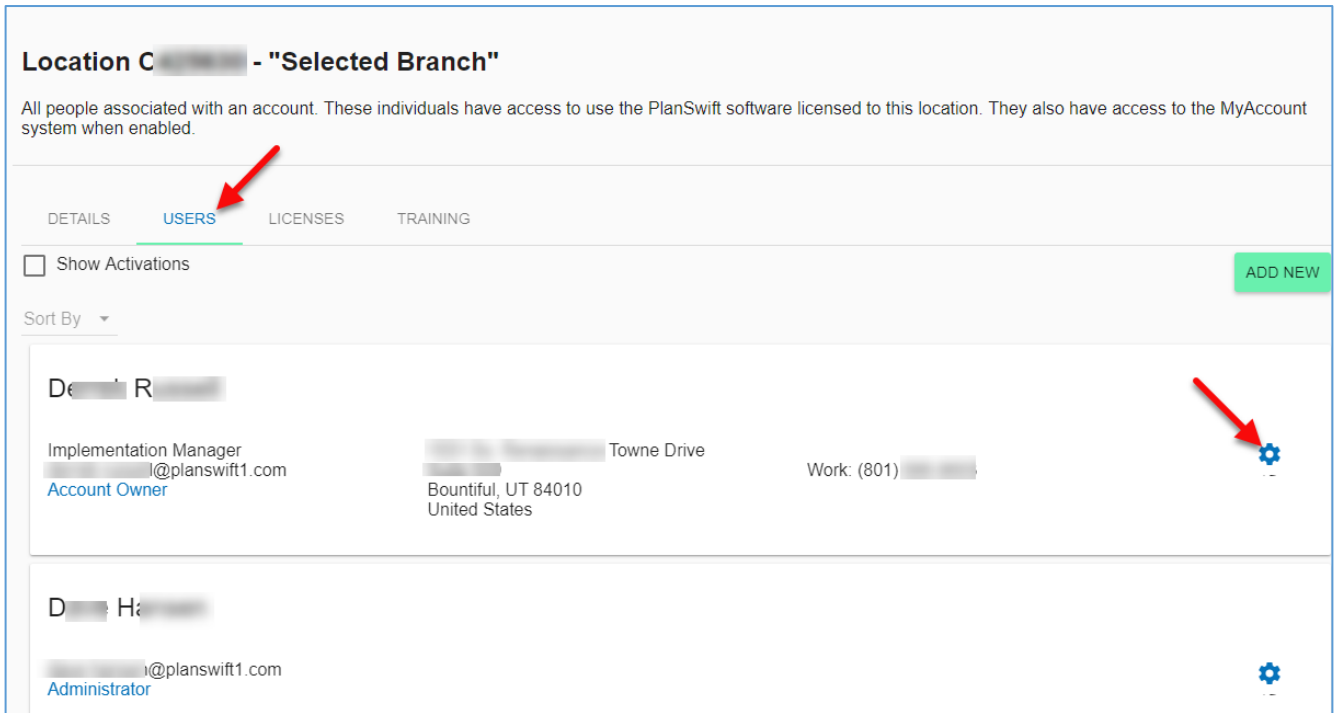


Figure E-3

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

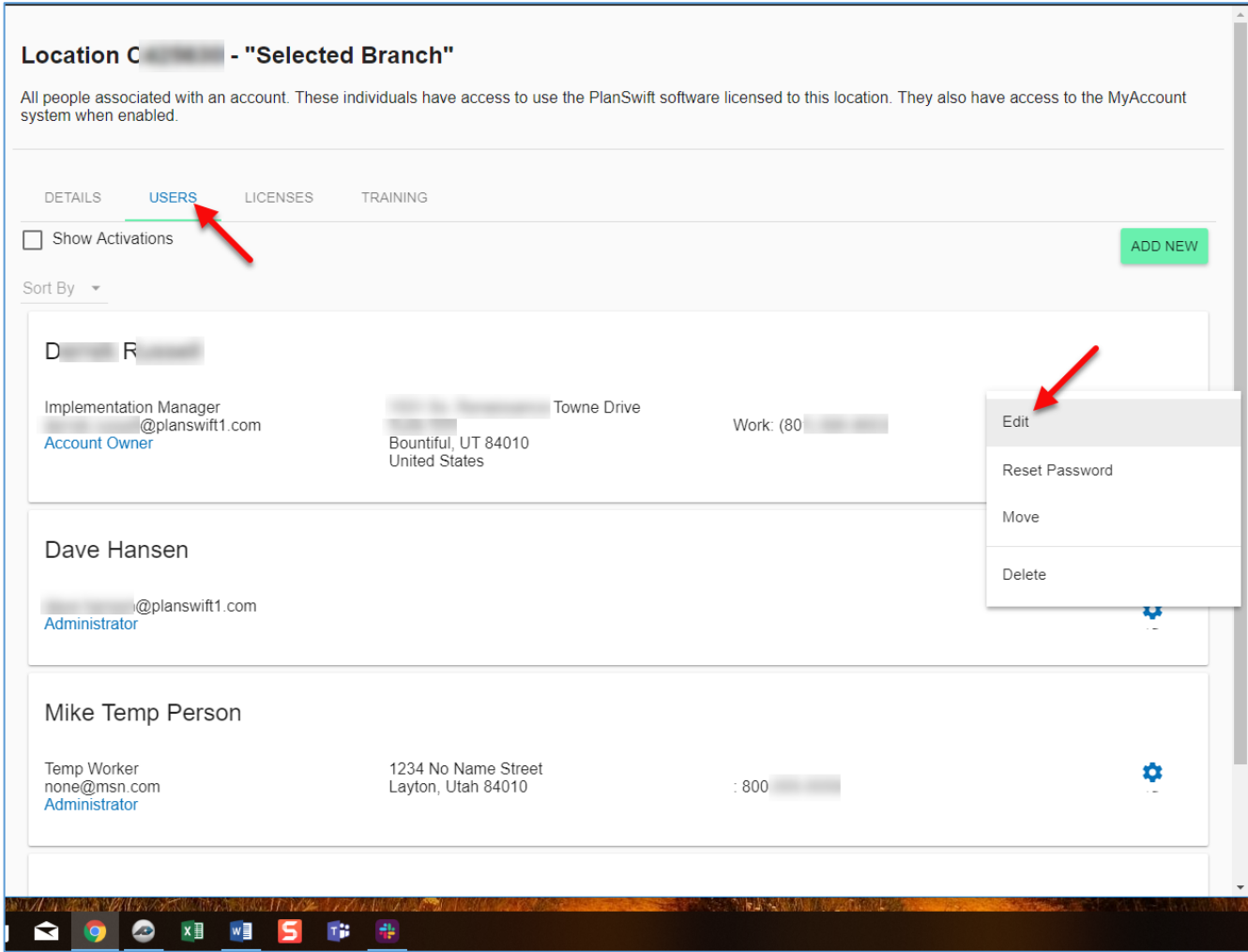


Figure E-4

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**).

**Editing Contact for C425630 - Enterprise Business Unit**

[Go Back](#) to the Branch view

First Name	Mike Temp		Last Name	Person	
Title	Temp Worker				
Admin Level	Administrator				
Email	none@msn.com				
Address	1234 No Name Street				
Address 2					
City	Layton	State	Utah	Zip	84010
Phone Number	800-555-5555				
Phone Number					
Phone Number					

**SAVE**

**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.

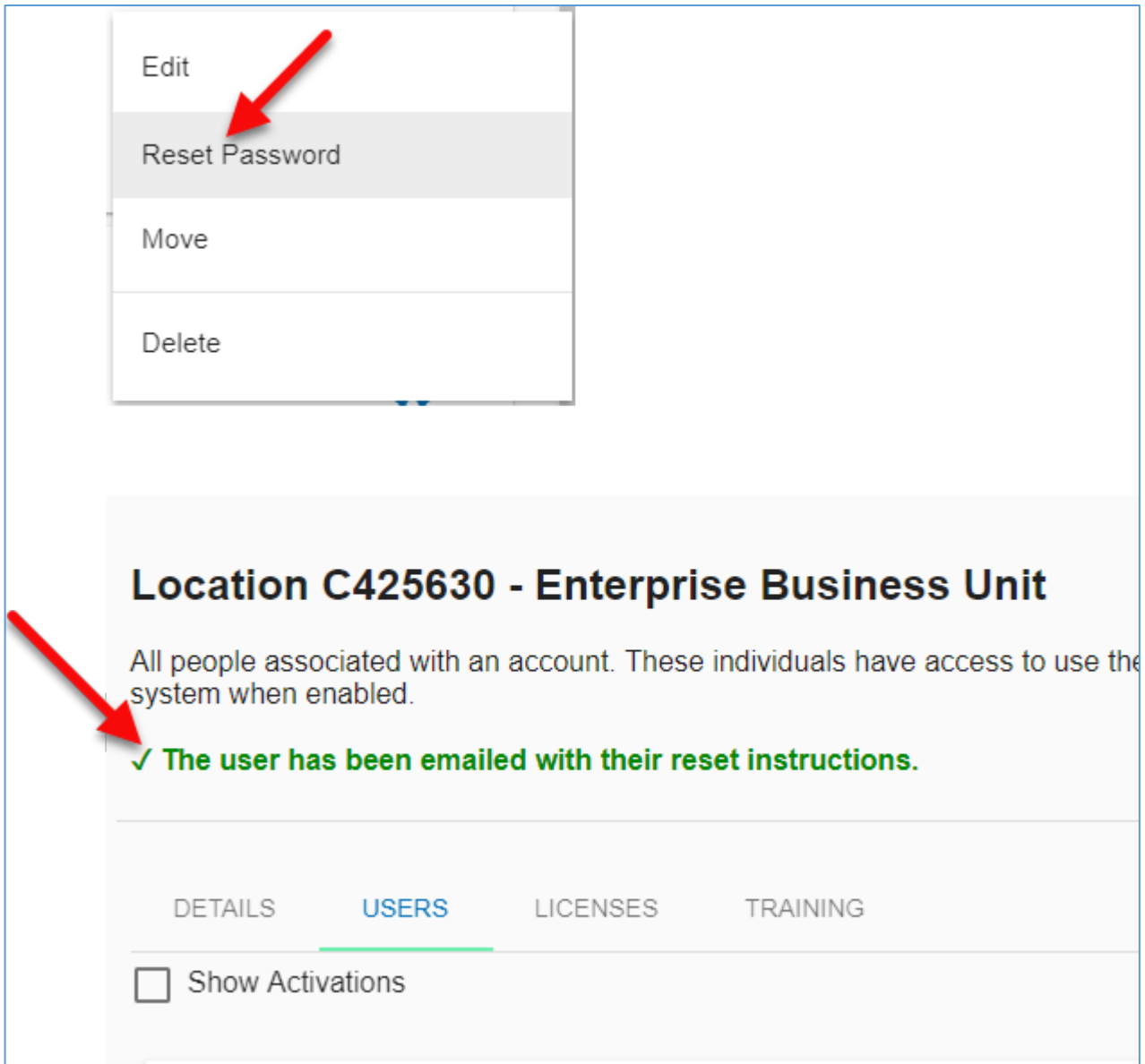


Figure E-6

# 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**.

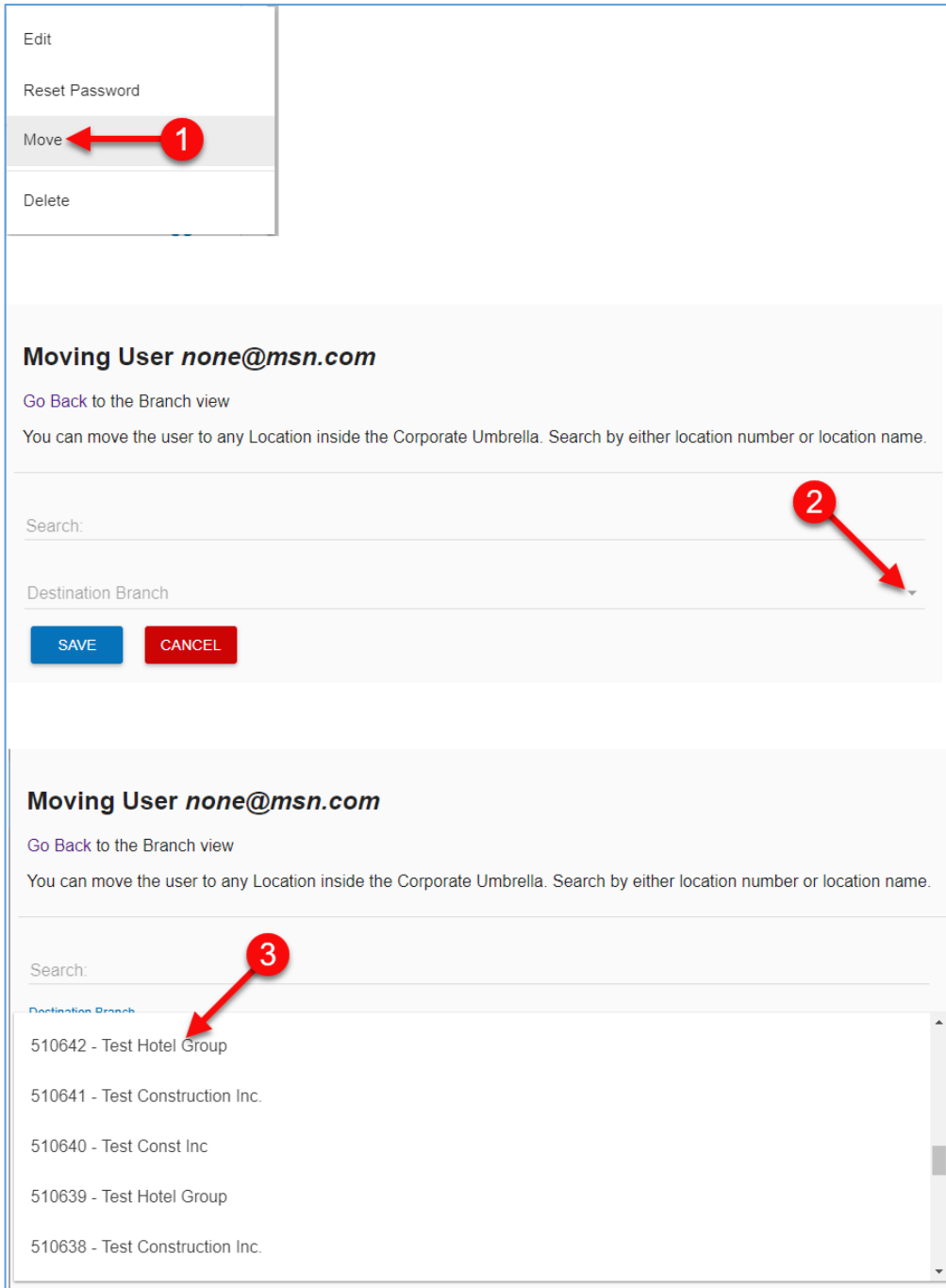


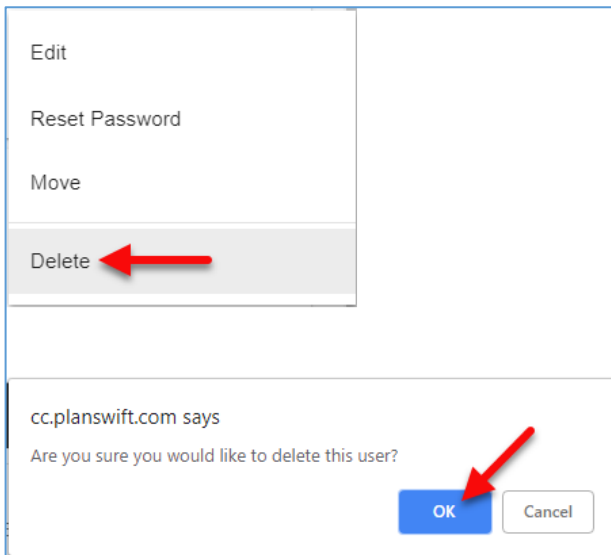
Figure E-7

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## 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).

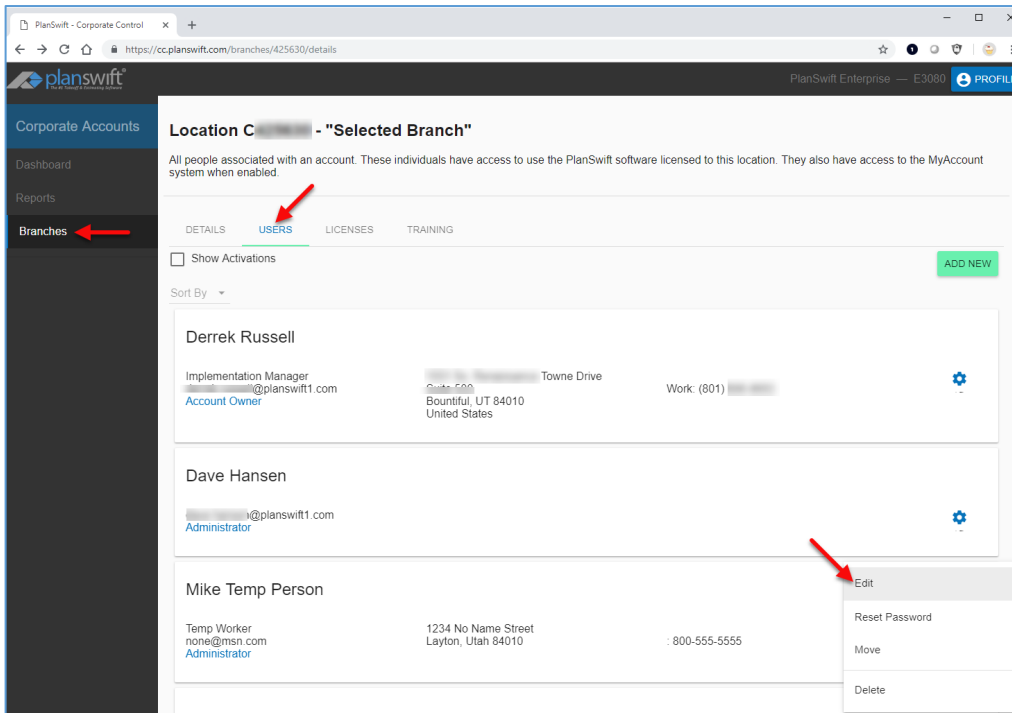


Figure E-9

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

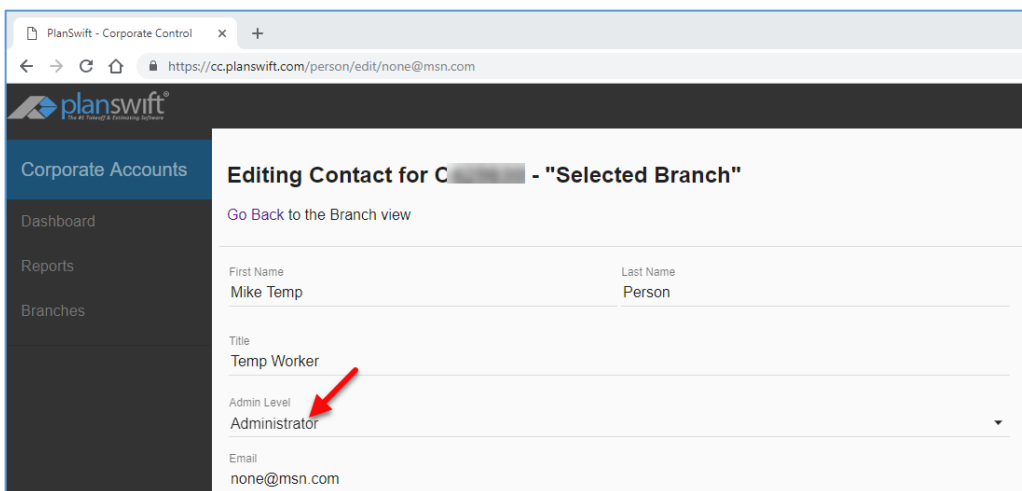


Figure E-10

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.

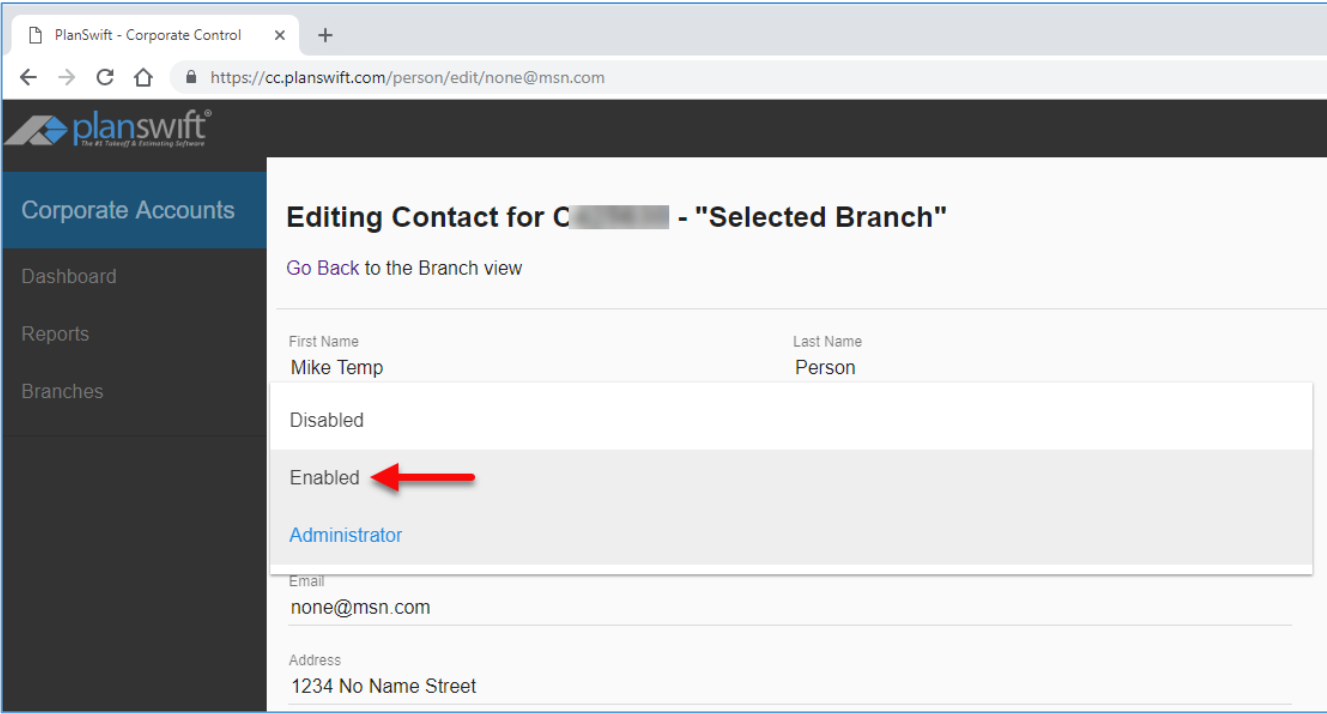


Figure E-11

# 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.

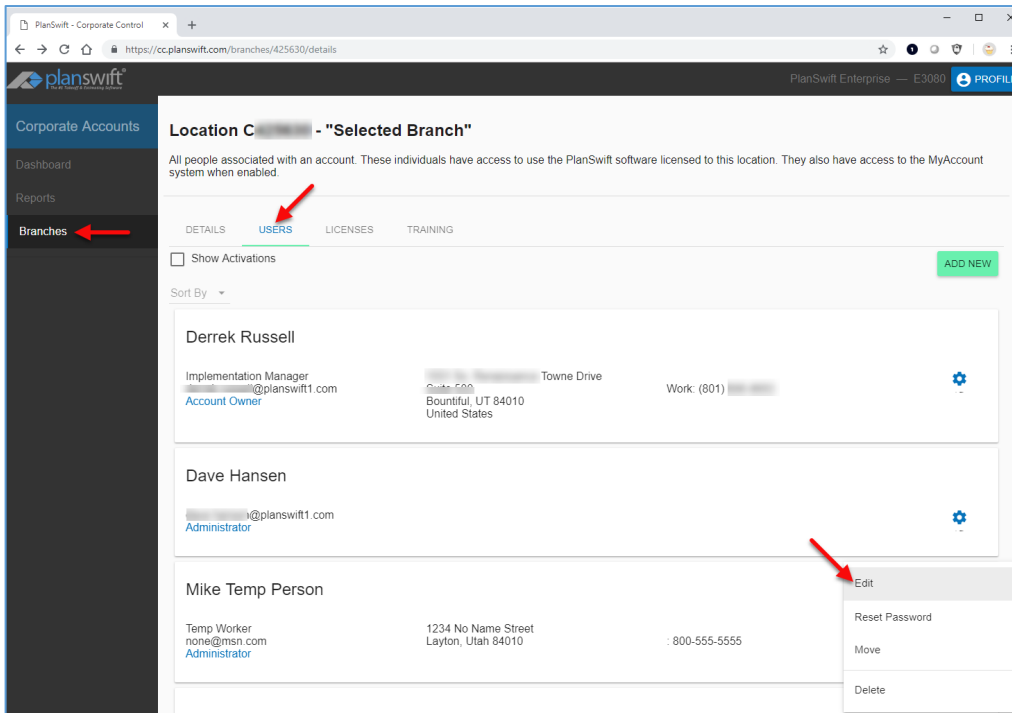


Figure E-12

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

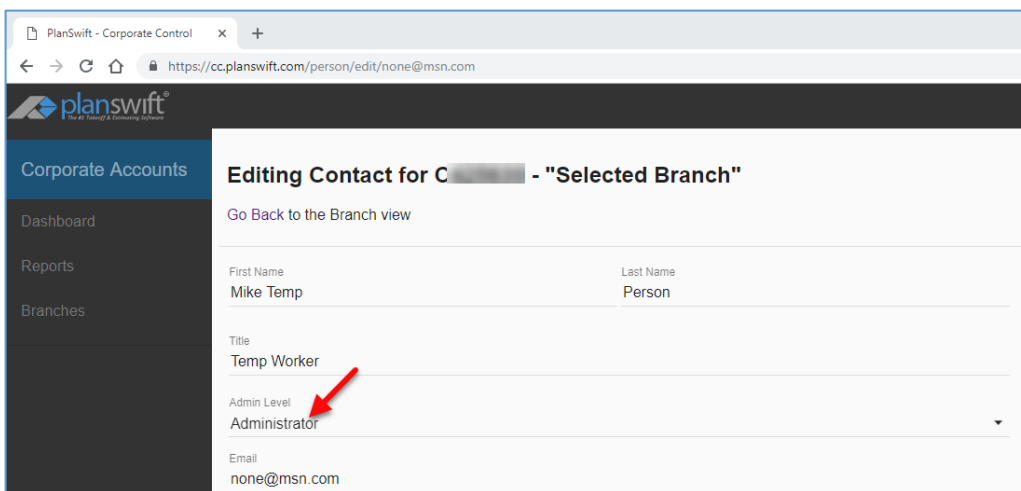



Figure E-13

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	Last Name
Mike Temp	Person
Disabled 	
Enabled	
<a href="#">Administrator</a>	
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.

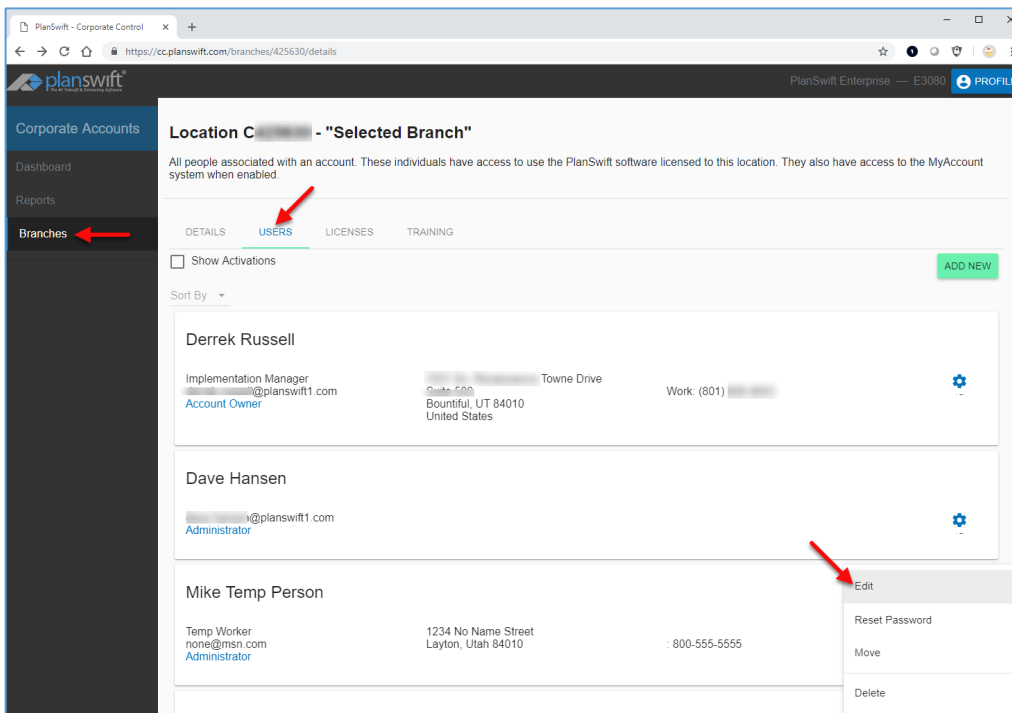


Figure E-15

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.

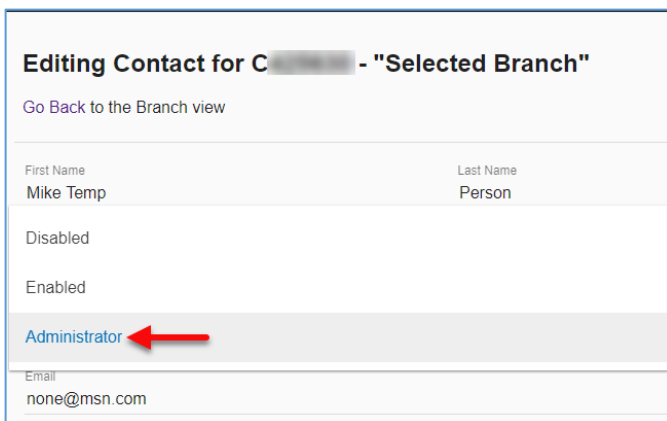


Figure E-16



# 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.

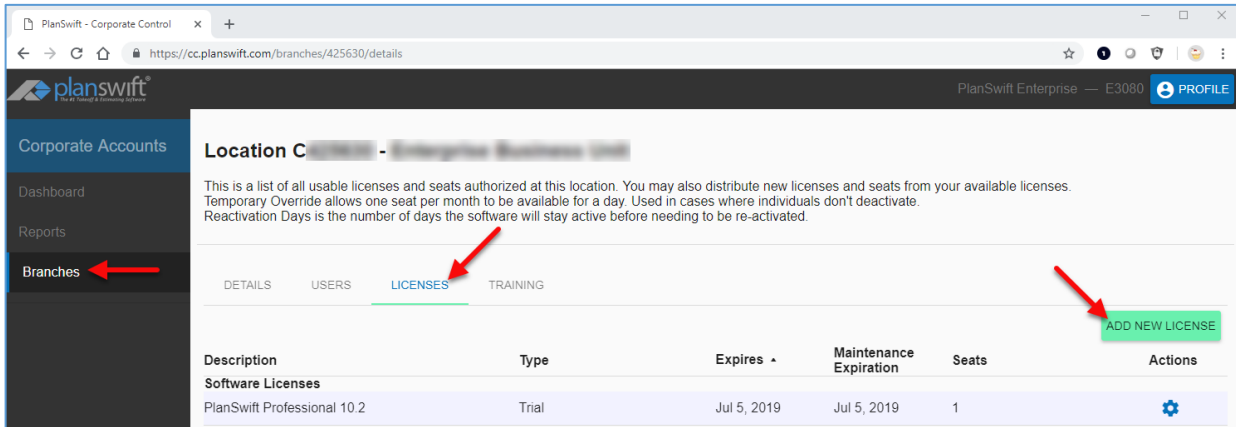


Figure F-1

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**.

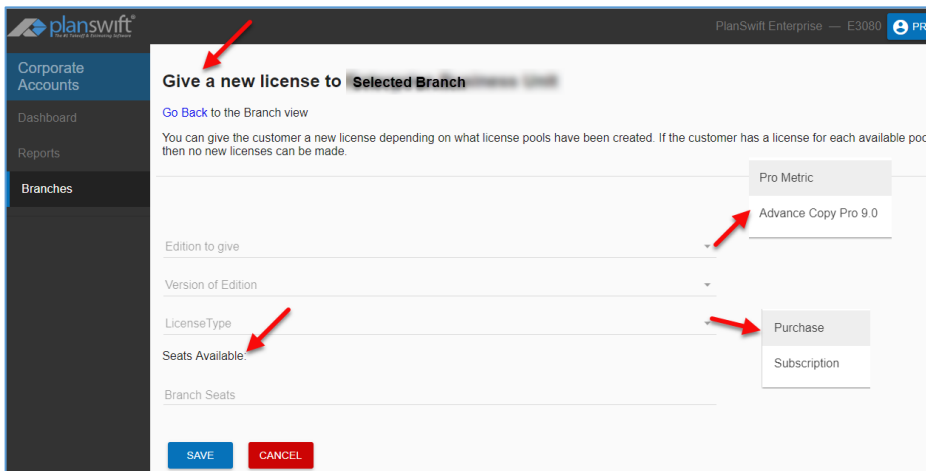


Figure F-2

# 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.

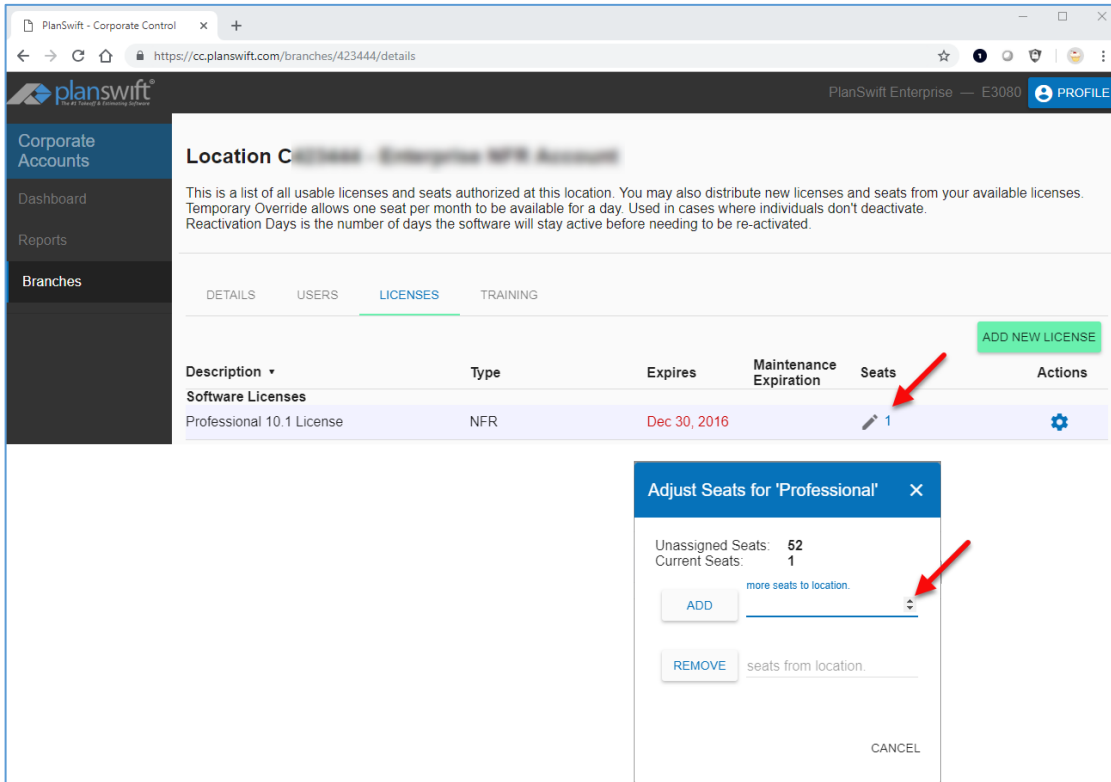


Figure F-3

# 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.

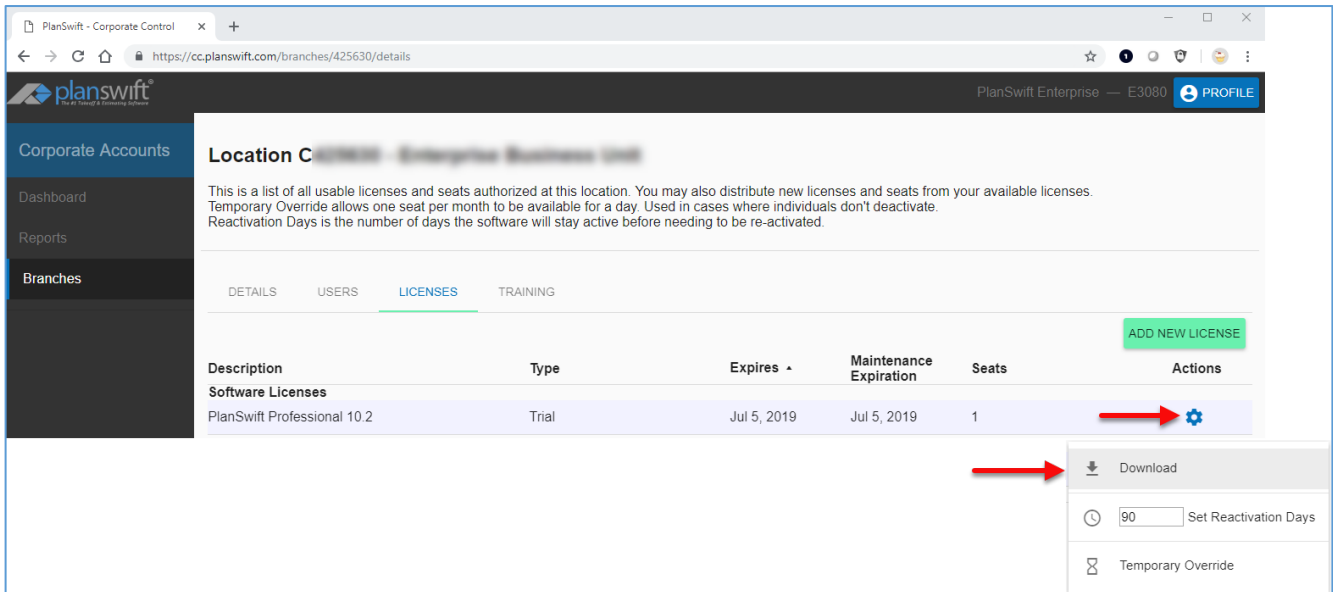


Figure F-4

## 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).

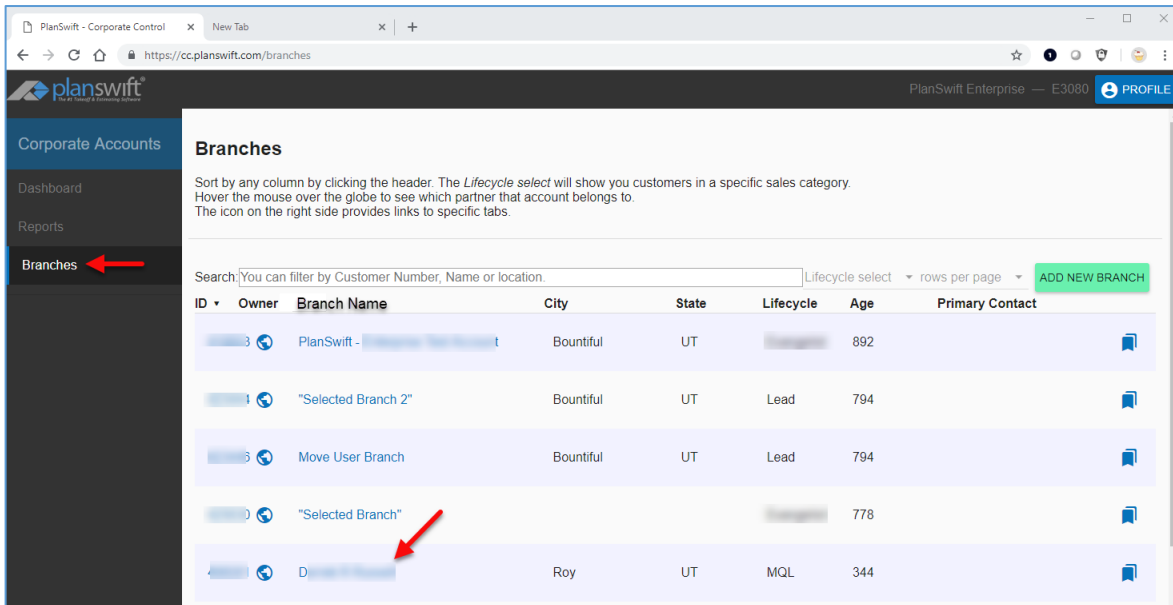


Figure F-5

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.

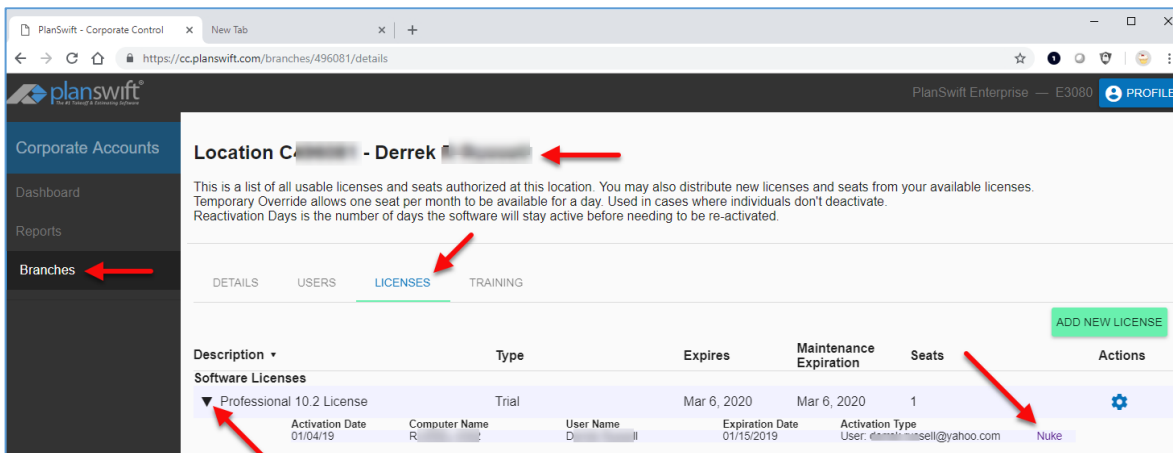


Figure F-6