RIB CX

Reference Guide

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About this guide

This guide is designed to give you a quick start to using RIB CX. If you require more in-depth instruction on the features of RIB CX please use the Help module.

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1. About RIB CX

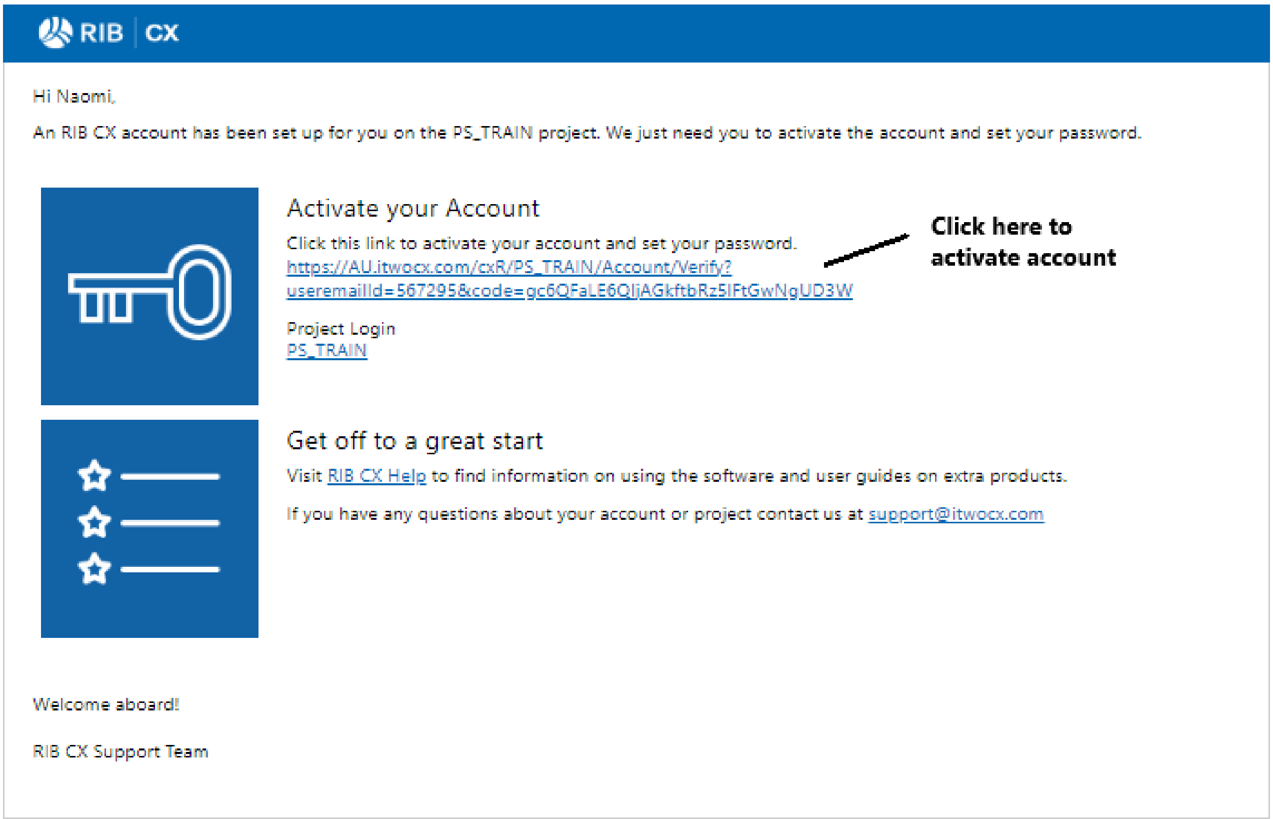
RIB CX is a project management tool which has been designed to enhance collaboration amongst project teams.

All project documentation including correspondence forms and revision-controlled documents can easily and securely be shared amongst the project team.

2. Activating your account

When you are added to a project for the first time you will be sent an email requesting that you activate your account.

Simply click on the link contained in the email to set up a password.



Hi Naomi,

An RIB CX account has been set up for you on the PS_TRAIN project. We just need you to activate the account and set your password.

Activate your Account

Click this link to activate your account and set your password.
https://AU.itwocx.com/cxR/PS_TRAIN/Account/Verify?useremailId=567295&code=gc6QFaLE6QljAGkftbRz5IFtGwNgUD3W

Click here to activate account

Project Login
PS_TRAIN

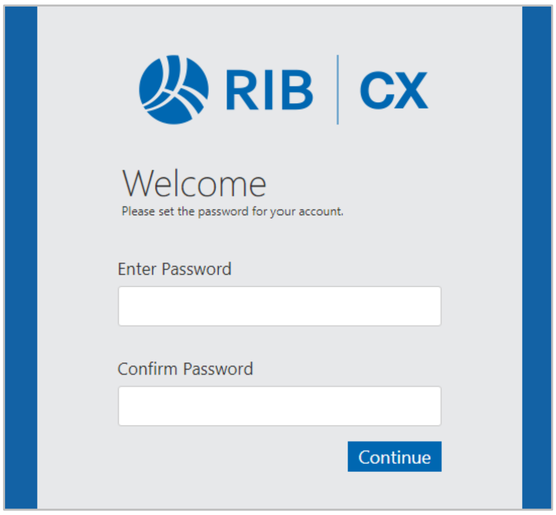
Get off to a great start

Visit RIB CX Help to find information on using the software and user guides on extra products.

If you have any questions about your account or project contact us at support@itwocx.com

Welcome aboard!

RIB CX Support Team



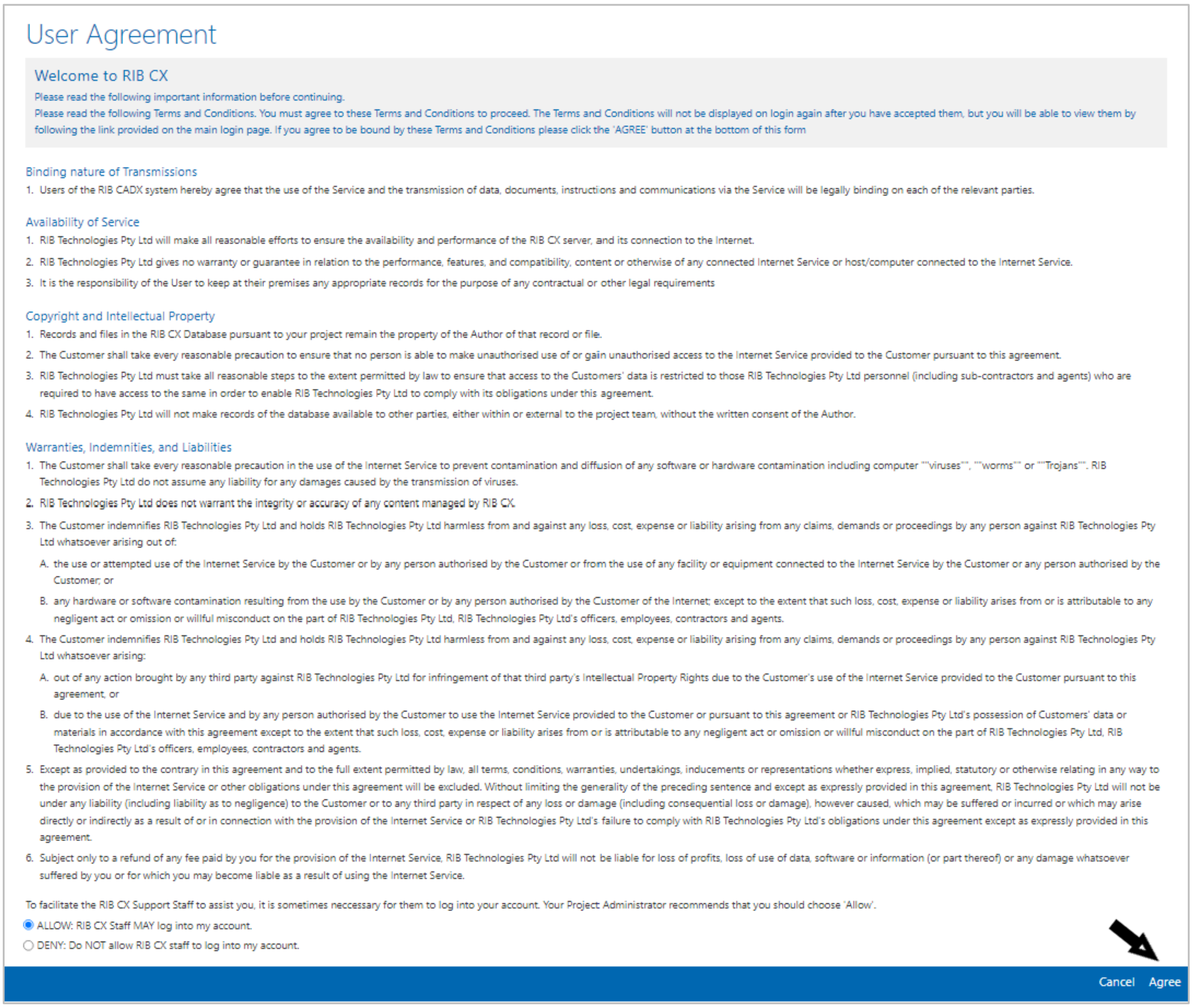
Welcome

Please set the password for your account.

Enter Password

Confirm Password

Enter a password, confirm the password and then click continue. Your project will open and you will be asked to agree to the User Agreement. Once you click 'agree' the Activities Module will display.



User Agreement

Welcome to RIB CX

Please read the following important information before continuing.

Please read the following Terms and Conditions. You must agree to these Terms and Conditions to proceed. The Terms and Conditions will not be displayed on login again after you have accepted them, but you will be able to view them by following the link provided on the main login page. If you agree to be bound by these Terms and Conditions please click the 'AGREE' button at the bottom of this form

Binding nature of Transmissions

1. Users of the RIB CADX system hereby agree that the use of the Service and the transmission of data, documents, instructions and communications via the Service will be legally binding on each of the relevant parties.

Availability of Service

1. RIB Technologies Pty Ltd will make all reasonable efforts to ensure the availability and performance of the RIB CX server, and its connection to the Internet.
2. RIB Technologies Pty Ltd gives no warranty or guarantee in relation to the performance, features, and compatibility, content or otherwise of any connected Internet Service or host/computer connected to the Internet Service.
3. It is the responsibility of the User to keep at their premises any appropriate records for the purpose of any contractual or other legal requirements

Copyright and Intellectual Property

1. Records and files in the RIB CX Database pursuant to your project remain the property of the Author of that record or file.
2. The Customer shall take every reasonable precaution to ensure that no person is able to make unauthorised use of or gain unauthorised access to the Internet Service provided to the Customer pursuant to this agreement.
3. RIB Technologies Pty Ltd must take all reasonable steps to the extent permitted by law to ensure that access to the Customers' data is restricted to those RIB Technologies Pty Ltd personnel (including sub-contractors and agents) who are required to have access to the same in order to enable RIB Technologies Pty Ltd to comply with its obligations under this agreement.
4. RIB Technologies Pty Ltd will not make records of the database available to other parties, either within or external to the project team, without the written consent of the Author.

Warranties, Indemnities, and Liabilities

1. The Customer shall take every reasonable precaution in the use of the Internet Service to prevent contamination and diffusion of any software or hardware contamination including computer ""viruses"", ""worms"" or ""Trojans"". RIB Technologies Pty Ltd do not assume any liability for any damages caused by the transmission of viruses.
2. RIB Technologies Pty Ltd does not warrant the integrity or accuracy of any content managed by RIB CX.
3. The Customer indemnifies RIB Technologies Pty Ltd and holds RIB Technologies Pty Ltd harmless from and against any loss, cost, expense or liability arising from any claims, demands or proceedings by any person against RIB Technologies Pty Ltd whatsoever arising out of:
   A. the use or attempted use of the Internet Service by the Customer or by any person authorised by the Customer or from the use of any facility or equipment connected to the Internet Service by the Customer or any person authorised by the Customer; or
   B. any hardware or software contamination resulting from the use by the Customer or by any person authorised by the Customer of the Internet; except to the extent that such loss, cost, expense or liability arises from or is attributable to any negligent act or omission or willful misconduct on the part of RIB Technologies Pty Ltd, RIB Technologies Pty Ltd's officers, employees, contractors and agents.
4. The Customer indemnifies RIB Technologies Pty Ltd and holds RIB Technologies Pty Ltd harmless from and against any loss, cost, expense or liability arising from any claims, demands or proceedings by any person against RIB Technologies Pty Ltd whatsoever arising:
   A. out of any action brought by any third party against RIB Technologies Pty Ltd for infringement of that third party's Intellectual Property Rights due to the Customer's use of the Internet Service provided to the Customer pursuant to this agreement, or
   B. due to the use of the Internet Service and by any person authorised by the Customer to use the Internet Service provided to the Customer or pursuant to this agreement or RIB Technologies Pty Ltd's possession of Customers' data or materials in accordance with this agreement except to the extent that such loss, cost, expense or liability arises from or is attributable to any negligent act or omission or willful misconduct on the part of RIB Technologies Pty Ltd, RIB Technologies Pty Ltd's officers, employees, contractors and agents.
5. Except as provided to the contrary in this agreement and to the full extent permitted by law, all terms, conditions, warranties, undertakings, inducements or representations whether express, implied, statutory or otherwise relating in any way to the provision of the Internet Service or other obligations under this agreement will be excluded. Without limiting the generality of the preceding sentence and except as expressly provided in this agreement, RIB Technologies Pty Ltd will not be under any liability (including liability as to negligence) to the Customer or to any third party in respect of any loss or damage (including consequential loss or damage), however caused, which may be suffered or incurred or which may arise directly or indirectly as a result of or in connection with the provision of the Internet Service or RIB Technologies Pty Ltd's failure to comply with RIB Technologies Pty Ltd's obligations under this agreement except as expressly provided in this agreement.
6. Subject only to a refund of any fee paid by you for the provision of the Internet Service, RIB Technologies Pty Ltd will not be liable for loss of profits, loss of use of data, software or information (or part thereof) or any damage whatsoever suffered by you or for which you may become liable as a result of using the Internet Service.

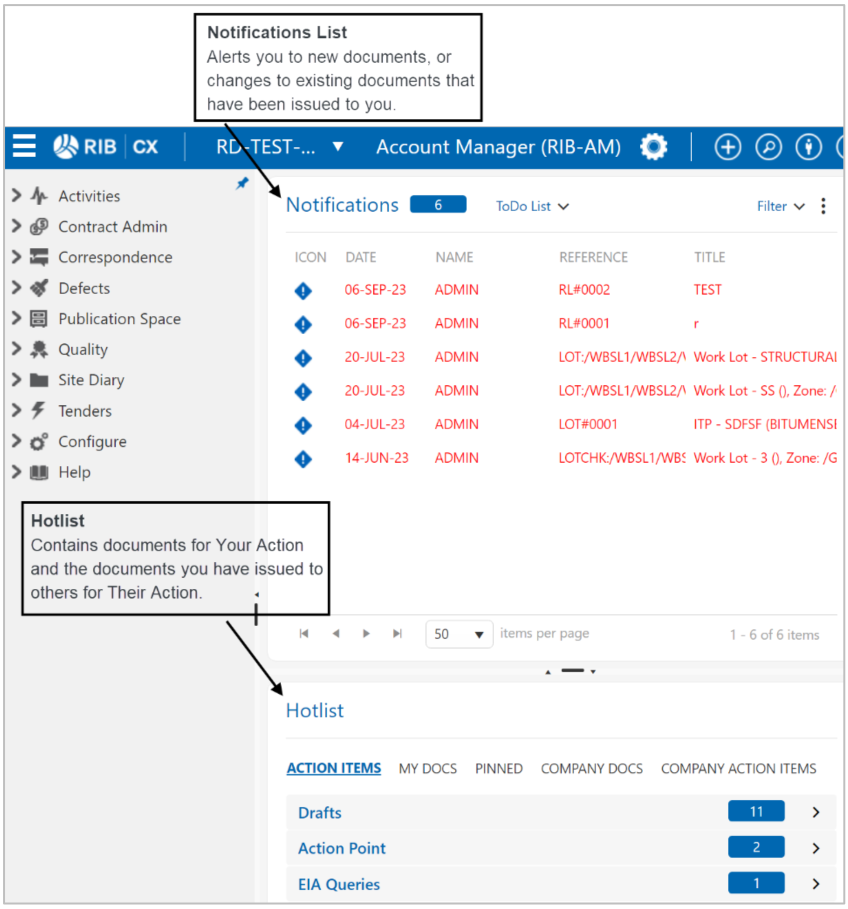
To facilitate the RIB CX Support Staff to assist you, it is sometimes neccessary for them to log into your account. Your Project Administrator recommends that you should choose 'Allow'.

● ALLOW: RIB CX Staff MAY log into my account.

○ DENY: Do NOT allow RIB CX staff to log into my account.

3. Activities module

The Activities module is where you access your ToDo List (a list items that have been sent to you for Action or Information). You can also view your project Calendar. The Activities module is the default landing page when you log into RIB CX.



Notifications List
Alerts you to new documents, or changes to existing documents that have been issued to you.

RIB CX
RD-TEST-...
Account Manager (RIB-AM)
Activities
Contract Admin
Correspondence
Defects
Publication Space
Quality
Site Diary
Tenders
Configure
Help
Notifications 6
ToDo List
Filter

ICON	DATE	NAME	REFERENCE	TITLE
◆	06-SEP-23	ADMIN	RL#0002	TEST
◆	06-SEP-23	ADMIN	RL#0001	r
◆	20-JUL-23	ADMIN	LOT:/WBSL1/WBSL2/\	Work Lot - STRUCTURAI
◆	20-JUL-23	ADMIN	LOT:/WBSL1/WBSL2/\	Work Lot - SS (), Zone: /
◆	04-JUL-23	ADMIN	LOT#0001	ITP - SDFSF (BITUMENSI
◆	14-JUN-23	ADMIN	LOTCHK:/WBSL1/WBS	Work Lot - 3 (), Zone: /G

50 items per page
1 - 6 of 6 items
Hotlist
ACTION ITEMS
MY DOCS
PINNED
COMPANY DOCS
COMPANY ACTION ITEMS

Drafts	11
Action Point	2
EIA Queries	1

Hotlist
Contains documents for Your Action and the documents you have issued to others for Their Action.

3.1. Notifications list

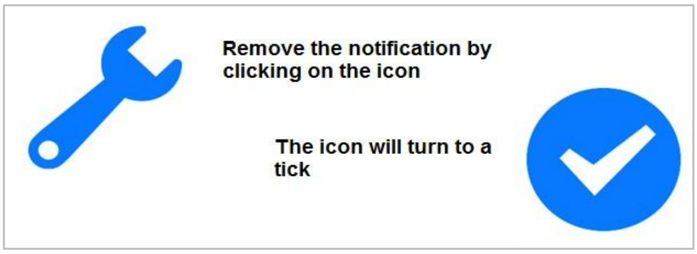
To keep you up to date with new and updated documents, the Notifications list uses icon to indicate your involvement with each document.

🔧	The spanner indicates that a document has been issued to you for Your Action
◆	The exclamation mark means the document has passed its Due Date or has been on your list for more than 3 days.
ⓘ	The 'i' means the document has been issued For Your Information

3.2. Managing notifications

Once you have read or responded to the document you should remove the notification from the list by clicking on the icon. The icon will change to a tick and when your browser is refreshed the notification will be removed. Removing actioned notifications will help keep your list relevant and up-to-date.

Note: The document that the notification links to is not deleted. You can easily find the document in its relevant register, or by using Search.

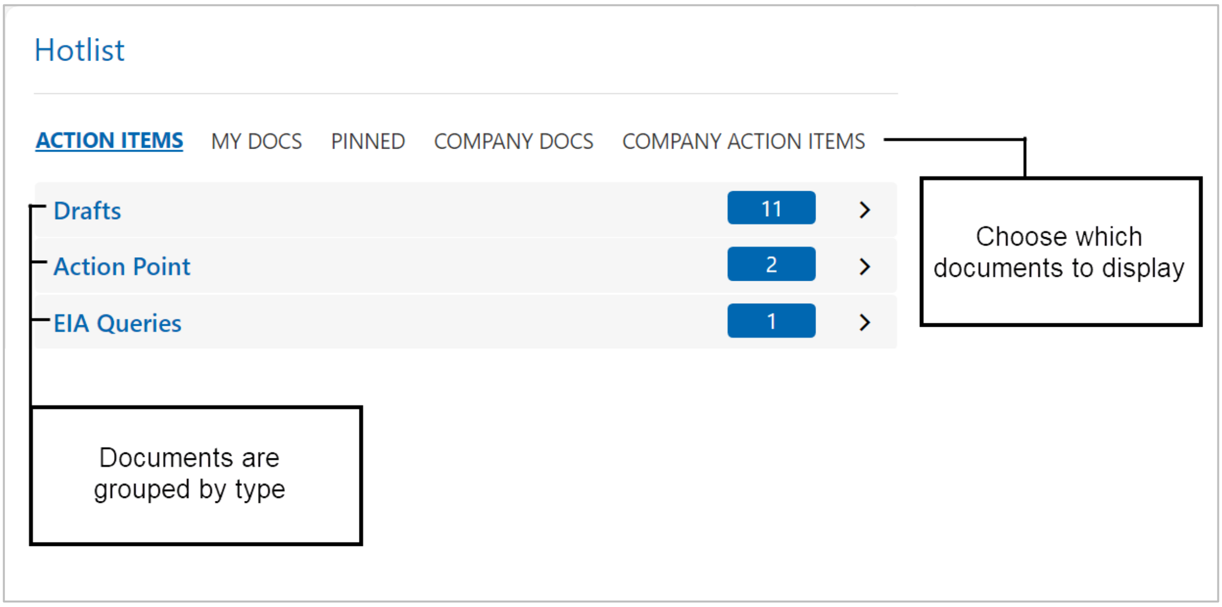


Remove the notification by clicking on the icon

The icon will turn to a tick

3.3. Hotlist

The Hotlist contains any document with a Due Date that has been authored by you or issued to you for Action. You can also view Company Docs or Pin documents for easy reference. The Hotlist allows you to manage these documents in one place.



Drafts 11

Action Point 2

EIA Queries 1

Choose which documents to display

Documents are grouped by type

3.4. Managing your hotlist

Documents remain on your Hotlist until they are Closed if they are for Your Action or authored by you.

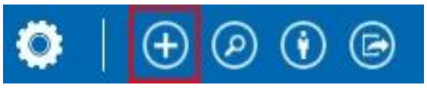
Use the filters at the top of the hotlist to switch between documents issued to you and those you have authored.

4. Correspondence module

The Correspondence module houses all project communication. Forms created in RIB CX are automatically stored according to type. The forms on your project have been customised for project use.

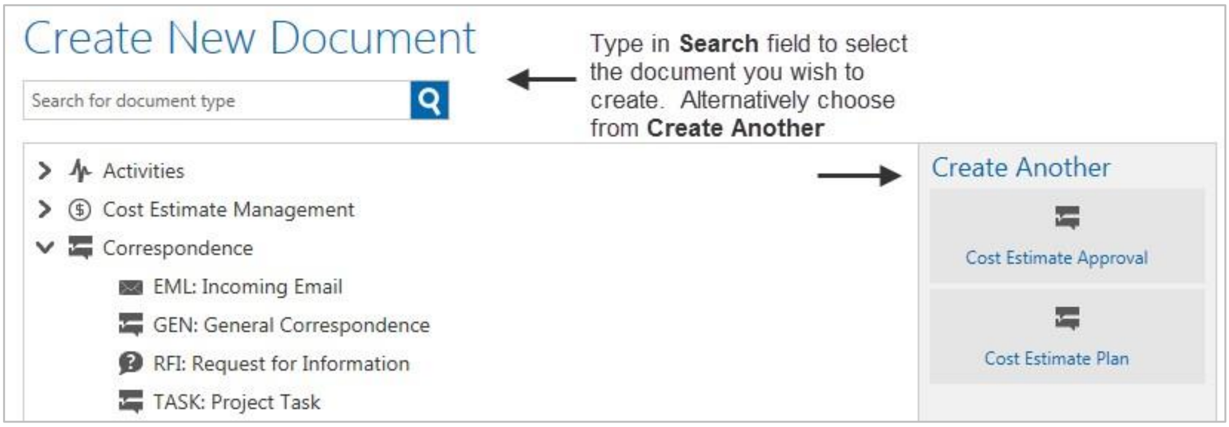
4.1. Creating a form

Click the Plus icon on Project Tool Bar to create a new form.



Use the search field to type in the name of the form type you wish to create or select from the options listed under Correspondence.

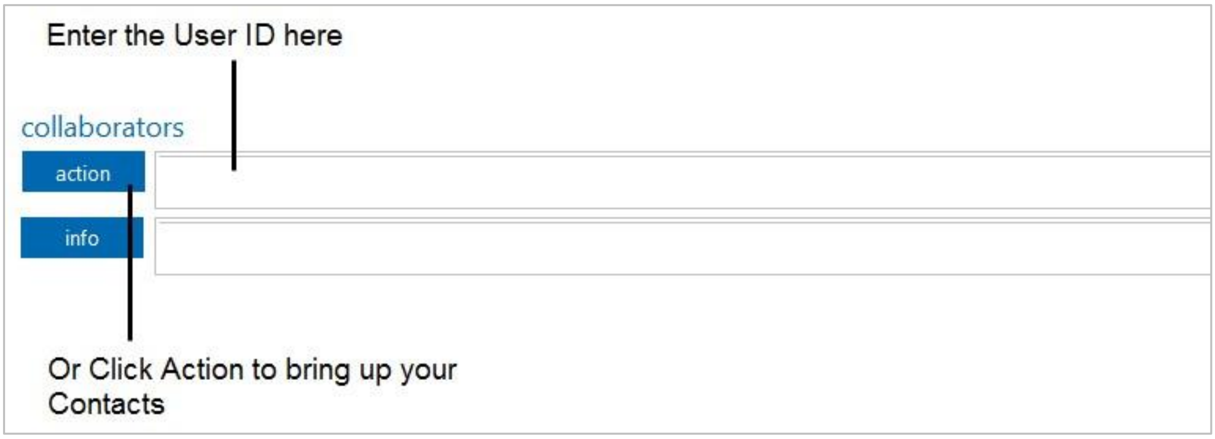
Alternatively, make your selection from the list of your frequently used document types listed under Create Another.


Create New Document
Search for document type
Activities
Cost Estimate Management
Correspondence
EML: Incoming Email
GEN: General Correspondence
RFI: Request for Information
TASK: Project Task
Create Another
Cost Estimate Approval
Cost Estimate Plan

Type in **Search** field to select the document you wish to create. Alternatively choose from **Create Another**

4.2. Addressing a form

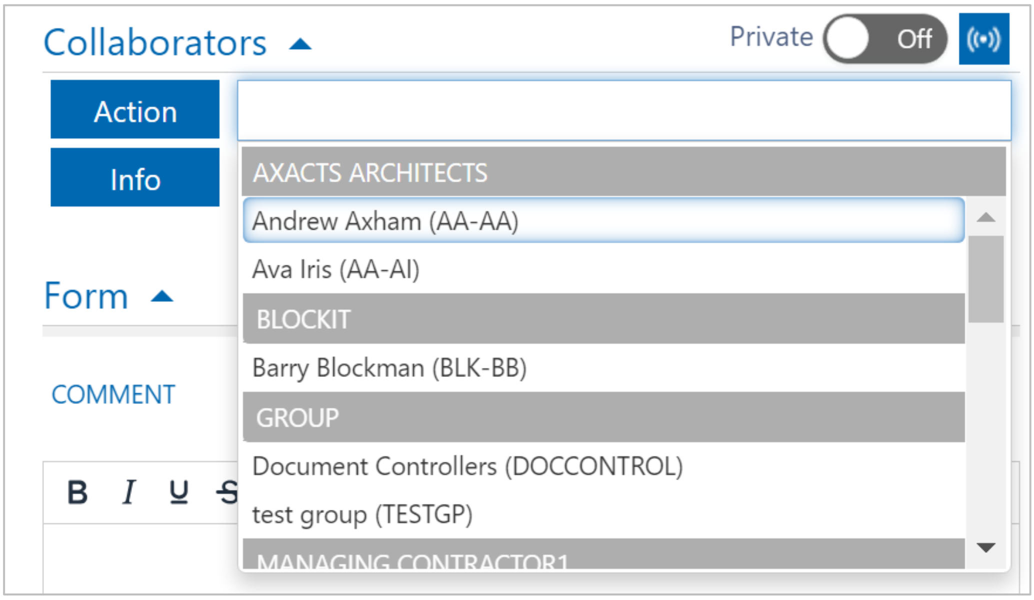
On Classic Forms - Type the name or user id of the person you wish to address in the Action and info Field, then click enter. If the user exists their name will display. If the name turns red, there are either multiple users with that name on your project or the name does not exist. Double click on the name to either select the correct action person or delete the incorrect name.


Enter the User ID here

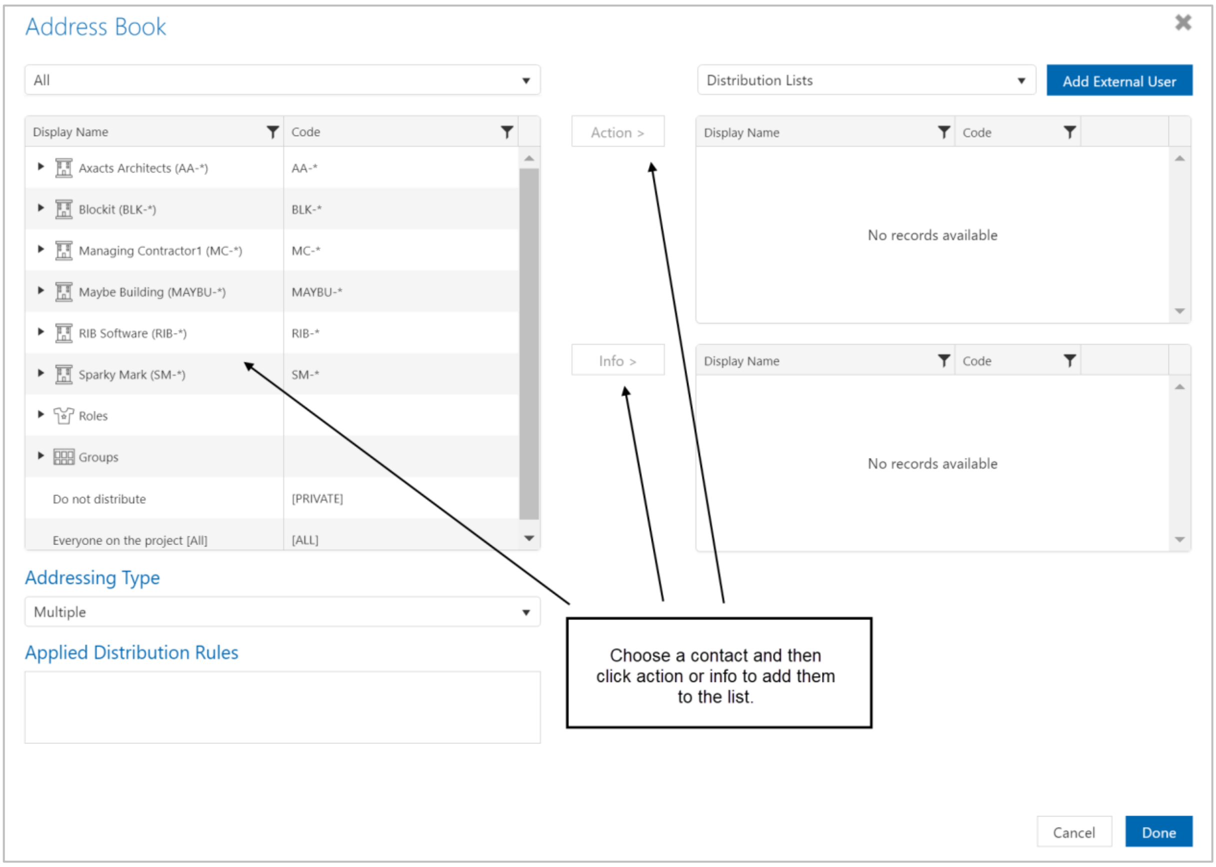
collaborators
action
info

Or Click Action to bring up your Contacts

On Modern Forms – Click in the Action or Info box and select the user from the contacts list.


Collaborators
Private
Off
Action
Info
Form
COMMENT
B
I
U
S
AXACTS ARCHITECTS
Andrew Axham (AA-AA)
Ava Iris (AA-AI)
BLOCKIT
Barry Blockman (BLK-BB)
GROUP
Document Controllers (DOCCONTROL)
test group (TESTGP)
MANAGING CONTRACTOR1

Alternatively, click on Action or Info to display your project address book. This will show the names of all users you can communicate with through the system.



Display Name	Code
Axacts Architects (AA-*)	AA-*
Blockit (BLK-*)	BLK-*
Managing Contractor1 (MC-*)	MC-*
Maybe Building (MAYBU-*)	MAYBU-*
RIB Software (RIB-*)	RIB-*
Sparky Mark (SM-*)	SM-*
Roles	
Groups	
Do not distribute	[PRIVATE]
Everyone on the project [All]	[ALL]

Display Name	Code
No records available	

Display Name	Code
No records available	

Addressing Type: Multiple

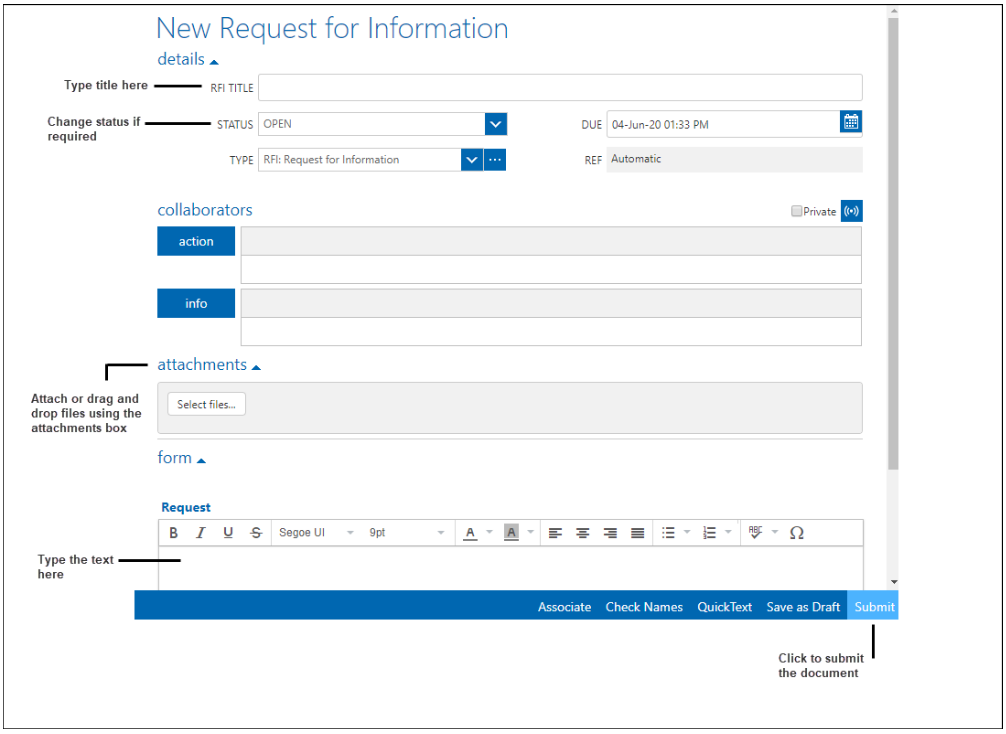
Applied Distribution Rules

Choose a contact and then click action or info to add them to the list.

4.3. Filling out a form

Once you have addressed the form you are now ready to add more details:
Add a meaningful title. This will help make searching easier.
Check the status. Does this form need to be answered in a particular time frame or can it be sent closed?

Add any supporting information through Attachments
Type the text in the Request or Comments section.



New Request for Information

RFI TITLE:

STATUS: OPEN

DUE: 04-Jun-20 01:33 PM

TYPE: RFI: Request for Information

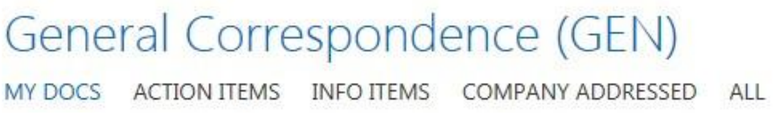
REF: Automatic

details
collaborators
☐ Private
action
info
attachments
Select files...
form
Request
B I U S Segoe UI 9pt
Associate Check Names QuickText Save as Draft Submit
Type title here
Change status if required
Attach or drag and drop files using the attachments box
Type the text here
Click to submit the document

When all information is complete, click Submit to issue or Save as Draft if required.

5. Searching for Documents

Once a document has been issued, it will be filed in the corresponding document list. Use filters e.ge My Docs, Action Items etc, to refine the list.



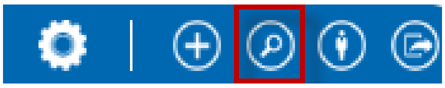
General Correspondence (GEN)
MY DOCS
ACTION ITEMS
INFO ITEMS
COMPANY ADDRESSED
ALL

As the project grows, it may be necessary to use the RIB CX search function to locate required documents. Knowing how to use the Search will save you time.

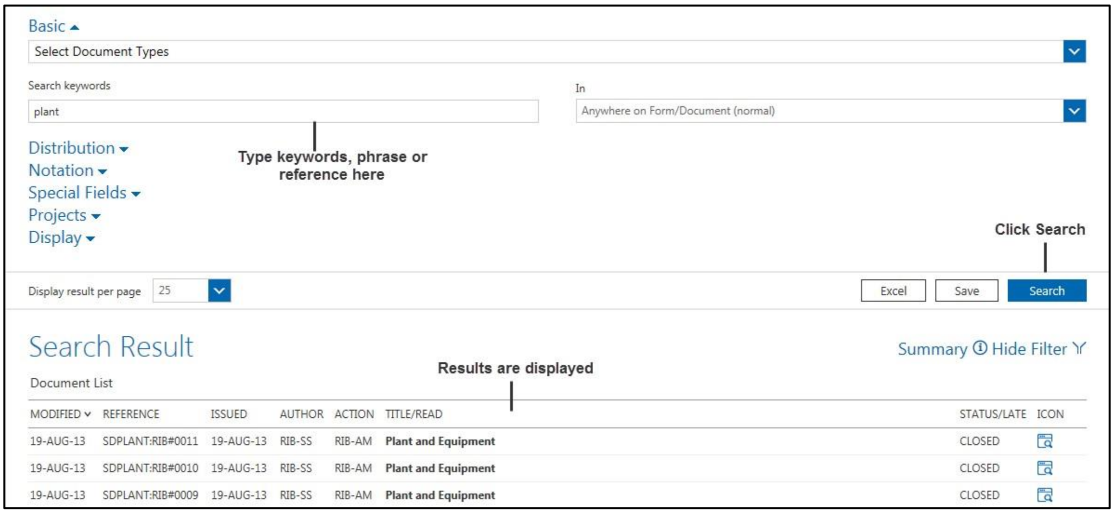
5.1. Simple Search

Simple Search is the easiest but least specific search to use. A simple search looks for whole words only and searches the document Reference, Title, Body Text, Comment Text and File Name. Search results list documents that contain the specified keyword or phrase added to the Keyword box. Wildcards, e.g. asterisk (*) can also be used.

To run a simple search, click on the Magnifying glass icon on the Project Tool Bar.



Add search criteria to keywords and click search. Results will display below.


Basic ▴
Select Document Types
Search keywords
In
Distribution ▾
Notation ▾
Special Fields ▾
Projects ▾
Display ▾
Display result per page
Excel
Save
Search
Summary ⓘ Hide Filter
Document List

Search keywords: plant

In: Anywhere on Form/Document (normal)

Display result per page: 25

Type keywords, phrase or reference here

Click Search

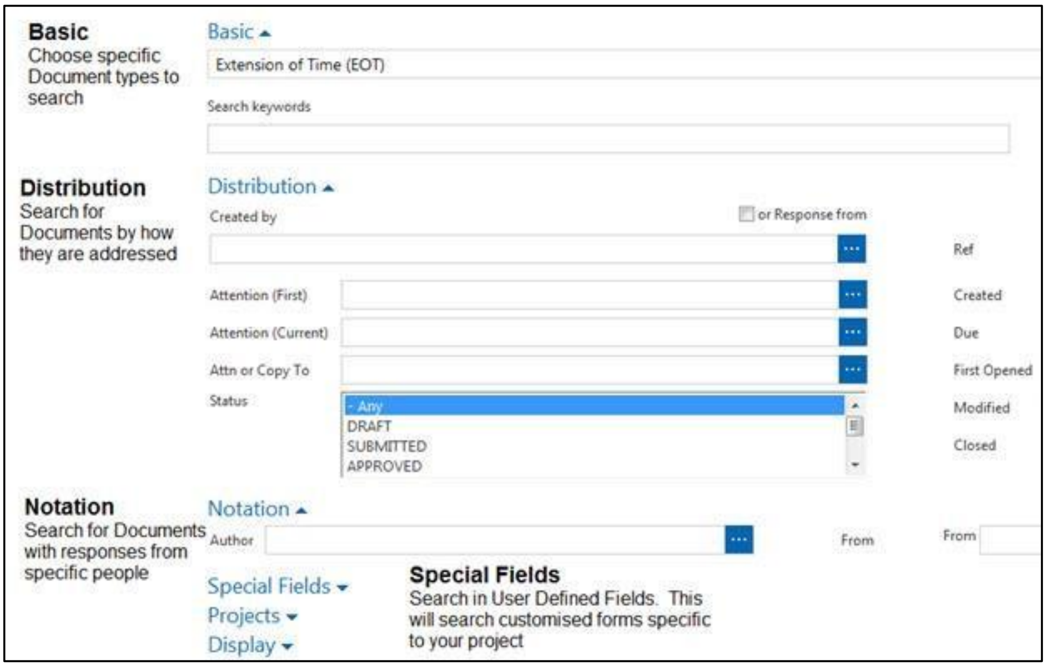
Search Result

Results are displayed

MODIFIED ▾	REFERENCE	ISSUED	AUTHOR	ACTION	TITLE/READ	STATUS/LATE	ICON
19-AUG-13	SDPLANT:RIB#0011	19-AUG-13	RIB-SS	RIB-AM	**Plant and Equipment**	CLOSED	
19-AUG-13	SDPLANT:RIB#0010	19-AUG-13	RIB-SS	RIB-AM	**Plant and Equipment**	CLOSED	
19-AUG-13	SDPLANT:RIB#0009	19-AUG-13	RIB-SS	RIB-AM	**Plant and Equipment**	CLOSED	

5.2. Advanced Search

Advanced searching enables you to refine your search criteria. The more criteria you use, the fewer matching results you can expect, and the faster the results will be returned. To run an advanced search, select the documents type(s) to search on, then define the search criteria using Distribution, Notation or Special User Fields options.


Basic ▴
Search keywords
Distribution ▴
Created by
☐ or Response from
Ref
Attention (First)
Created
Attention (Current)
Due
Attn or Copy To
First Opened
Status
Modified
Closed
Notation ▴
Author
From
From
Special Fields ▾
Projects ▾
Display ▾

Basic
Choose specific Document types to search

Extension of Time (EOT)

Distribution
Search for Documents by how they are addressed

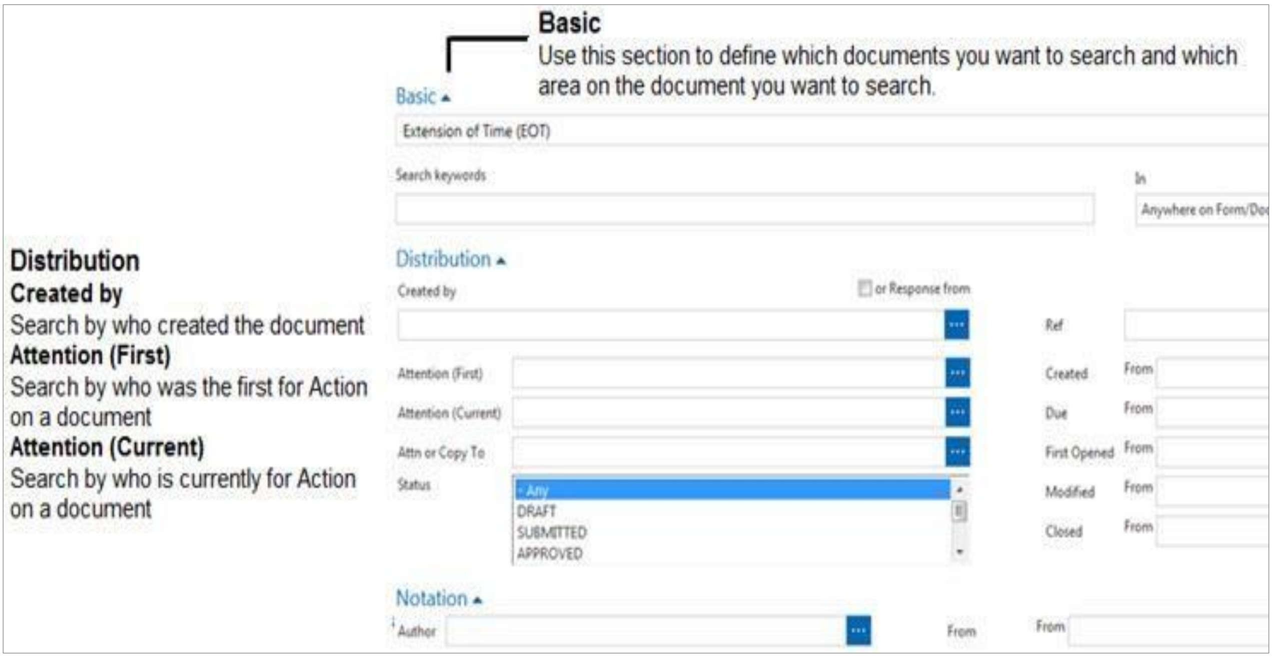
Status: - Any, DRAFT, SUBMITTED, APPROVED

Notation
Search for Documents with responses from specific people

Special Fields
Search in User Defined Fields. This will search customised forms specific to your project

5.3. Defining Search Criteria

Expand the Distribution, Notations or Special Fields tab to define additional search criteria. Distribution can be used to filter on Author, Attention person, Status and Date. Notations section will allow you to search for responses by defined users. Special Fields is used to search on user field criteria.



Basic
Use this section to define which documents you want to search and which area on the document you want to search.

Distribution
Created by
Search by who created the document
Attention (First)
Search by who was the first for Action on a document
Attention (Current)
Search by who is currently for Action on a document

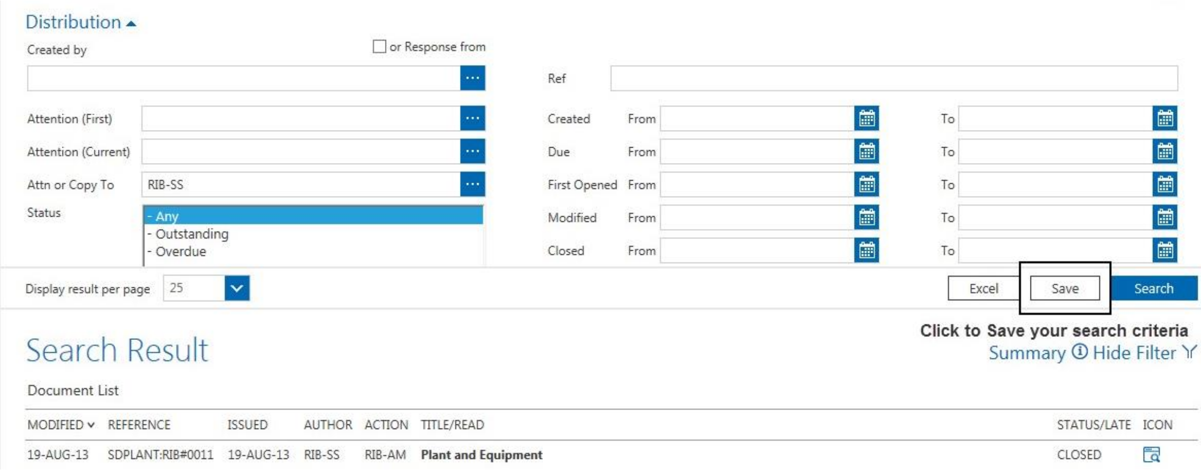
Extension of Time (EOT)

In: Anywhere on Form/Doc

Basic ▲
Search keywords
In
Distribution ▲
Created by
☐ or Response from
Ref
Attention (First)
Attention (Current)
Attn or Copy To
Status
- Any
DRAFT
SUBMITTED
APPROVED
Created
Due
First Opened
Modified
Closed
From
Notation ▲
Author
From

5.4. Saving a Search

Saving searches can be saved for future use, saving you time where complex criteria has been set. To save a search, simply fill out the search criteria and click save.



Attn or Copy To: RIB-SS

Display result per page: 25

Click to Save your search criteria

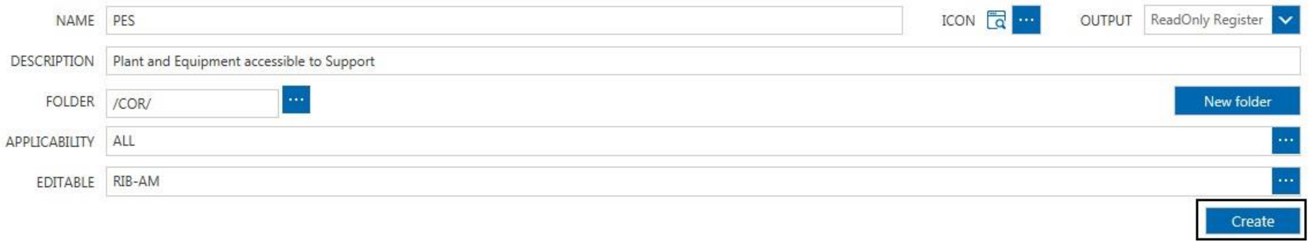
Search Result

Document List

MODIFIED ⌄	REFERENCE	ISSUED	AUTHOR	ACTION	TITLE/READ	STATUS/LATE	ICON
19-AUG-13	SDPLANT:RIB#0011	19-AUG-13	RIB-SS	RIB-AM	**Plant and Equipment**	CLOSED	

Distribution ▲
Created by
☐ or Response from
Attention (First)
Attention (Current)
Attn or Copy To
Status
- Any
- Outstanding
- Overdue
Ref
Created
Due
First Opened
Modified
Closed
From
To
Excel
Save
Search
Summary
Hide Filter

When the save window displays, name your search, choose where it is to be stored and set permissions to run and edit it.



NAME PES

DESCRIPTION Plant and Equipment accessible to Support

FOLDER /COR/

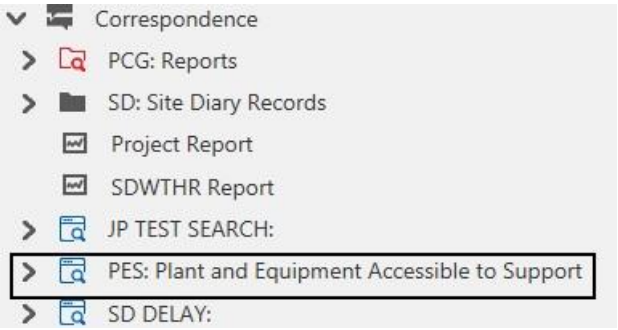
APPLICABILITY ALL

EDITABLE RIB-AM

OUTPUT ReadOnly Register

ICON
New folder
Create

Refresh your browser to display your saved search in the chosen folder location. To run your search, simply click on it from the menu. To edit, click on the arrow next to the search to display the edit favourites options.



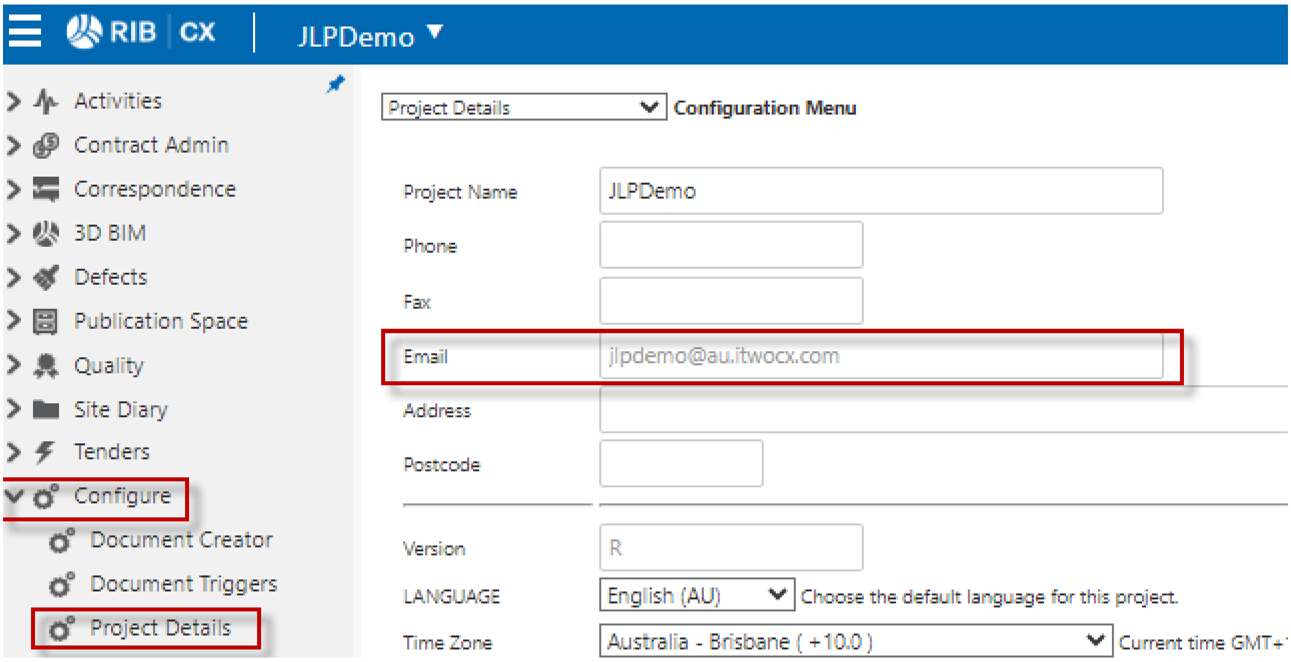
Correspondence
PCG: Reports
SD: Site Diary Records
Project Report
SDWTHR Report
JP TEST SEARCH:
PES: Plant and Equipment Accessible to Support
SD DELAY:

6. Importing Emails

Even though RIB CX is not intended to be used as an email system, a useful feature is the ability to forward emails from your email client into RIB CX. All external emails forwarded into the system will be received as an EML: Incoming email form type.

In order for a user to have the ability to forward emails into RIB CX they must first be added to the contacts list on the project as a standard user. The email address linked to the users name must correspond to the email address from which the email is being forwarded.

The email address to which the email much be forwarded in order to be imported into the system can be located under the Project Details page.


RIB | CX
JLPDemo
Activities
Contract Admin
Correspondence
3D BIM
Defects
Publication Space
Quality
Site Diary
Tenders
Configure
Document Creator
Document Triggers
Project Details

Project Details **Configuration Menu**

Project Name: JLPDemo
Phone:
Fax:
Email: jlpdemo@au.itwocx.com
Address:
Postcode:
Version: R
LANGUAGE: English (AU) Choose the default language for this project.
Time Zone: Australia - Brisbane (+10.0) Current time GMT+

Your project email address is:
Project Number@au.itwocx.com

Emails can also be forwarded directly to a user within RIB CX. The email will be of the format:
User-ID.Project Number@au.itwocx.com
e.g. rib-am.cxdemo@au.itwocx.com

7. Publication Space

7.1. Uploading Files to the Publication Space

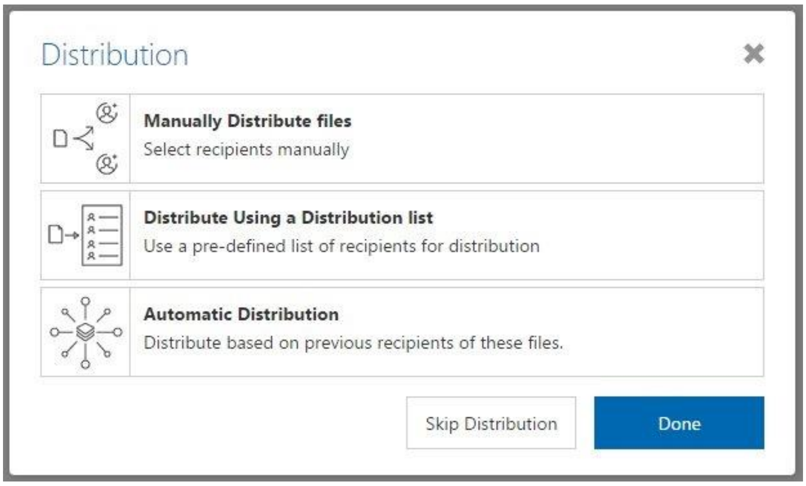
Uploading drawings and documents to the Publication Space can be done by:

1. Drag and drop files into the Publication Space folder where you want them located.
2. Use the uploaded Icon within the Publication Space to browse and attach the files to be uploaded.
3. Bulk import documents using and excel template.

7.2. Distributing Documents

Uploading files to the Publication Space will only give your company access to those files. If you want others outside of your company to have access, you will need to distribute them. Distribution can be done manually, by distribution rule or automatically based either on the folder setting or previous recipients.

The distribution menu will display when uploading the documents.



Distribution

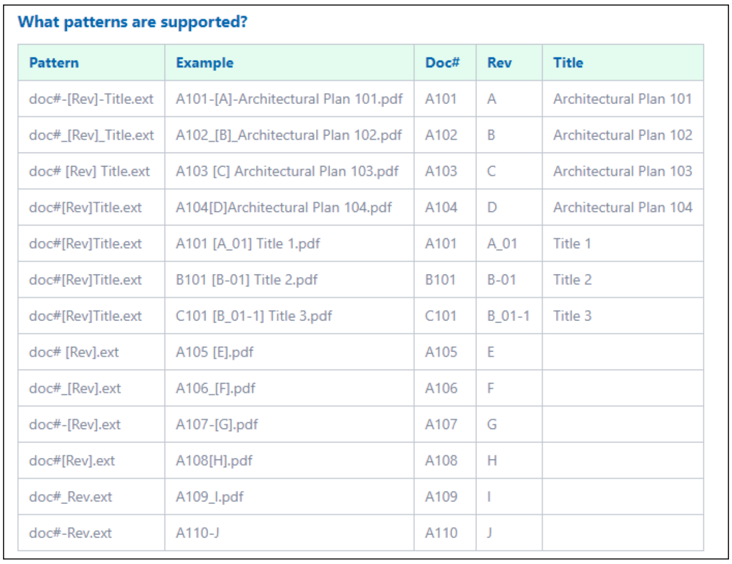
Manually Distribute files
Select recipients manually

Distribute Using a Distribution list
Use a pre-defined list of recipients for distribution

Automatic Distribution
Distribute based on previous recipients of these files.

7.3. File Pattern Matching

File pattern matching in Publication Space allows you to automatically populate predefined meta data for the documents you are uploading based on the name of the file that you are uploading to RIB CX.



What patterns are supported?

Pattern	Example	Doc#	Rev	Title
doc#-[Rev]-Title.ext	A101-[A]-Architectural Plan 101.pdf	A101	A	Architectural Plan 101
doc#_[Rev]_Title.ext	A102_[B]_Architectural Plan 102.pdf	A102	B	Architectural Plan 102
doc# [Rev] Title.ext	A103 [C] Architectural Plan 103.pdf	A103	C	Architectural Plan 103
doc#[Rev]Title.ext	A104[D]Architectural Plan 104.pdf	A104	D	Architectural Plan 104
doc#[Rev]Title.ext	A101 [A_01] Title 1.pdf	A101	A_01	Title 1
doc#[Rev]Title.ext	B101 [B-01] Title 2.pdf	B101	B-01	Title 2
doc#[Rev]Title.ext	C101 [B_01-1] Title 3.pdf	C101	B_01-1	Title 3
doc# [Rev].ext	A105 [E].pdf	A105	E	
doc#_[Rev].ext	A106_[F].pdf	A106	F	
doc#-[Rev].ext	A107-[G].pdf	A107	G	
doc#[Rev].ext	A108[H].pdf	A108	H	
doc#_Rev.ext	A109_I.pdf	A109	I	
doc#-Rev.ext	A110-J	A110	J	

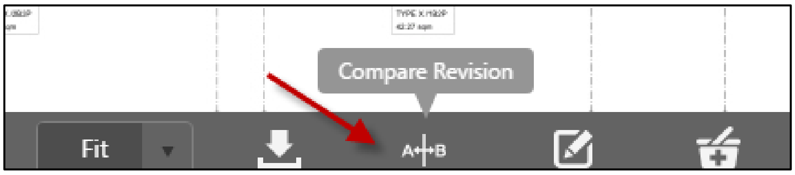
7.4. View, Compare and Download Documents

7.4.1. Viewing Document Details

When you are in a folder within the Publication Space, you will notice that each row will have an icon to indicate what type of document it is. You can review the document by clicking either the file icon, document number or revision.

7.4.2. Comparing Revisions

You can compare revisions, open the document by clicking in the document number and click on the compare icon on the document details toolbar.



Select the revision you would like to compare the current revision against.

7.5. Downloading Documents

Documents can be downloaded several ways and you can download one file at a time or multiple files:

1. By hovering over the document line and clicking on the download icon
2. Download the documents from the details page
3. Download documents from the basket
4. Download from the Transmittal.

8. Further Resources

This guide is designed to give you a quick start to using RIB CX. If you require more in-depth instruction on the features of RIB CX please use the Help module.
If you have any questions, please contact your RIB CX Project Administrator, or contact our RIB CX Support team on 1300 653 420 or support@ribcx.com.

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