PLANFRED-Manual

Manual for Participants & Project managers ENv24-01

Administrators and Owners

Basic Functions

Plans and Documents

Tasks

Special Functions

Plans & Documents

Administrators and Owners

A1 **Registration / Log In**

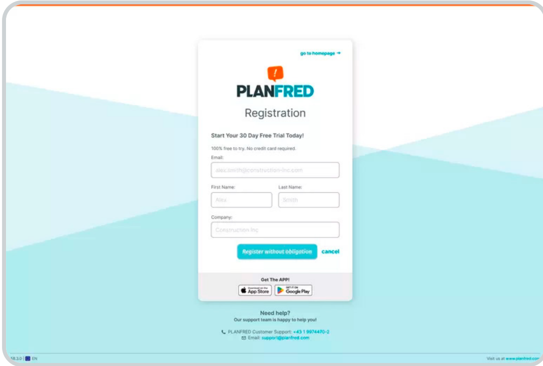
Creating Your PLANFRED User Account if you don't already have a PLANFRED login.

You can easily register by visiting app.planfred.com/registration.

Follow the instructions in the confirmation e-mail to create a user login.

Once registered, you can log in anytime using your e-mail address and password at app.planfred.com.

With your PLANFRED login you can access all your own projects as well as the ones you've been invited to. Simply switch between projects in the ***Projects*** section located at the top-center of the page.



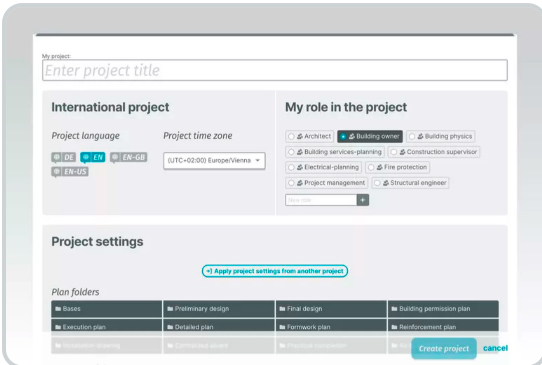
HINT
The password can be requested again at any time during login. Change the password in the ***User account*** (top right).

A2 **Create Project / Plan Selection**

Every PLANFRED user, whether registered or invited, has the ability to create their own projects, starting their free trial.

To create your first project, follow these steps:

- Click ***Create your first project***
- Enter the project title
- Select your role in the project. If the desired role is not available, enter it in the “New role” field and click **+** to add it.
- Click ***Create project***



After a 30-day trial period, the user account of a project owner will transition to a fee-based status.

RECOMMENDATION: We advise project owners with fee-based user accounts to use an unpersonalised e-mail address. This e-mail address should be used to create all projects. By doing so, you will have centralized access to all company projects and maintain ownership of all data. Project managers can then be added as administrators within their respective projects, granting them full permissions for project organization.

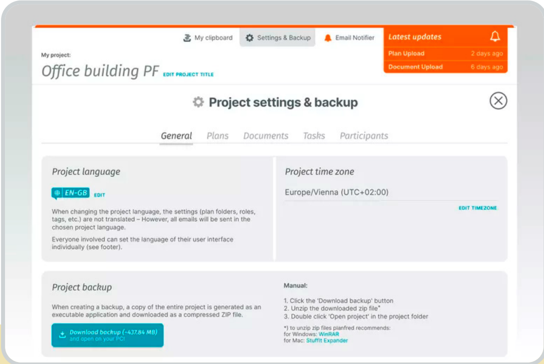
HINT
The ***Project transfer*** function located in the *“Settings & Backup”* section allows you to transfer your project's ownership to a participant with a chosen Plan selection. Once you have transferred your project and if you no longer have a project of your own, you will no longer be in the trial version.

A3 **Roles, Plan folders, and tags – individual project settings**

When project participants upload plans or documents, they are automatically organized based on their assigned roles. You can select top categories (optional), plan folders, and tags when creating plans or documents, and you can modify them later as needed. Participants can only update or edit data related to their own roles, while having read-only access to plans or documents associated with other roles. The Project owner and Project administrators have editing rights for all roles.

NOTE: Filters for roles and tags will only be displayed if plans or documents with these attributes exist.

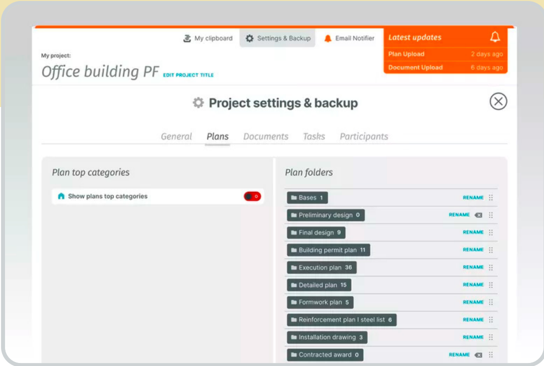
Settings & Backup (top right)



Customize Plan and Document folders

- ***rename*** and ***save*** folders
- Delete folders by clicking the **x** button (on the right)
- Add new folder: Enter a name in the “New plan folder” or “New document folder” field and clicking the **+** button
- Change order of folders: Click on the dots symbol on the right and move it to the desired position

HINT
If several documents are to be assigned to a different document folder: Click on ***Edit*** in the “Documents” tab, select documents, click on the ***Edit*** button at the very bottom, activate the change property ***Document folder***, select the Document folder and click on ***Update x Documents***.

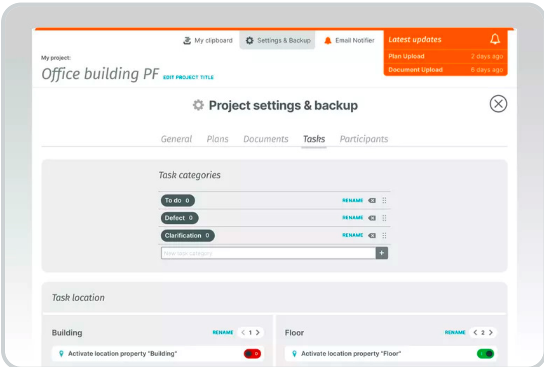


Customize Plan and Document tags

- ***rename*** and ***save*** tags
- Delete tags by clicking **x** (on the right)
- Add tags: Write name in “New tag” field and click **+** (new tags will be sorted alphabetically)

Rename or add roles of the participants

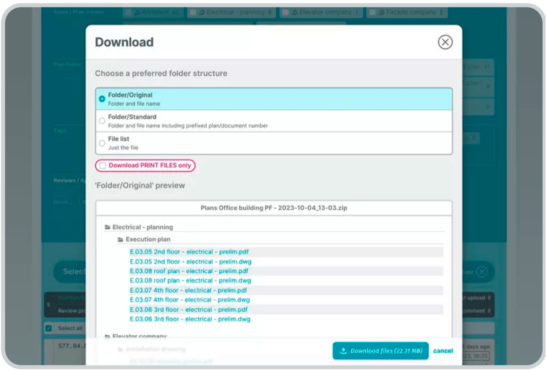
- ***rename*** and ***save*** roles
- Delete roles by clicking **x** (right)
- Add roles: Write name in “New role” field and click **+** (new roles will be sorted alphabetically)
- Roles can also be added directly when creating Project participants



Add plan and document top categories optionally

If, for example, additional folders are required for projects with several components, which are located as top categories above the roles, the “Plan top categories” function can be activated. This function is not active by default and can be activated and individually configured both when creating a project and for projects that are already running.

- by clicking on ***Show plans top categories*** or ***Show documents top categories*** the top categories are activated, the desired settings can then be made in the edit field:
- ***rename*** and ***save*** top categories
- Add top categories (e.g. component 1, etc.): Write the name in the field “New plan top category” or “New document top category” and click on **+**
- Delete top categories by clicking on **x** (only top categories to which no plan is assigned can be deleted)



NOTE: All existing plans and documents are automatically assigned to the “Standard” top category by PLANFRED. You can change the top category directly in the list view: Right-click on the plan you want to modify, select ***Edit top category*** in the pop-up window, adjust the settings and ***save*** the changes

HINT
You can easily transfer all project settings to other projects by following these steps: just click on ***+ New project*** and ***apply project settings from another project***.

Roles and Plan Folders - Organizing Structure for Downloading

When you download all plans, the Roles from the top-level folders, and the Plan folders become subfolders within them. If the Top categories are activated, they are displayed as the top-level folder category of the project. Therefore, when creating plan folders, it is important to consider which plans should be stored in each folder for easy downloading. The same applies to Document folders.

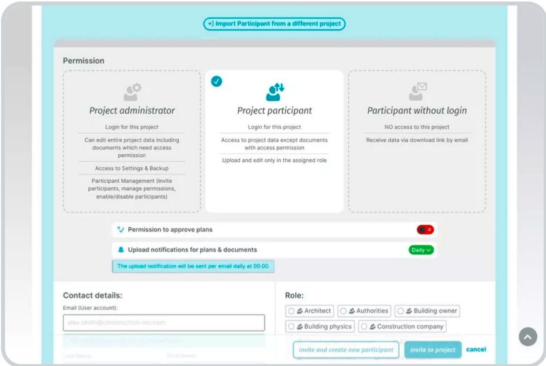
Tags - Additional Filtering Options

By adding tags, you can group plans or documents based on specific criteria and easily filter them. For example, if you have a plan called “Ground plan 2-fl”, you can assign tags such as “Ground plan” and “2-fl”. If you need to filter and access the ground plans specifically from the architect's execution plans, you can activate the filter for the “Architect” role, then the “Execution plans” filter, and finally the “Ground plan” tag (or enter the search terms “architect + execution + ground” in the search field). It is recommended to define tags in advance so that participants can easily select them when creating plans.

HINT
Tags with the same meaning can be combined into one tag by renaming: e.g. rename tag "GP" to "Ground Plan", so that all plans are only tagged with the tag "Ground Plan".

A4 **Invite participants to projects / permissions**

Participants do not need to register and use PLANFRED free of charge!
PLANFRED sends invitation e-mails when participants are created. In addition, the participants receive a link to the instructions: www.planfred.com/en/manual



Participants tab (top right)

- Click on ***Create new participant***
- Enter e-mail address
- Select permission: ***Project participant, Project administrator*** or ***Participant without login***
- Optional Permission to approve plans
- Recommendation: Upload notifications for plans & documents ***Daily*** (each participant can switch off his Upload Alert himself)
- Select the role or enter it in the "New role" field and click on **+**
- Enter last name, first name and company
- Enter optional contact information (phone number, address, note)
- Optional personalized message
- ***invite and create new participant***

HINT
Participants that have already been created can be imported to other projects: ***Create new participant*** and ***Import participant from a different project***.

HINT
Right-click on a participant in the list to access the following functions: ***Export contact, Edit permission, Grant or Revoke permission to approve plans,*** Upload notifier ***(Hourly, Daily, Off), Delete participant.***

HINT
In the participant detail view (click on Participant) under ***edit permission*** (top right), a Project participant can subsequently be made a Project administrator or their project access can be withdrawn.

Project participant

Project participants can only log in to projects to which they have been invited with their PLANFRED access data. With their project login, participants are authorised to download all project data and upload their plans and documents, which are automatically filed under the respective assigned role. Each participant can only update or edit data of their own role. A participant only has read access to plans and documents of other roles. In a team of, for example, several structural engineers, it is therefore important that they are assigned the same role when they are invited to the project.

Project administrator

Project administrators have almost the same rights in the project as the Project owner (however, they cannot delete the project or revoke the owner's access to the project). An administrator is authorised to invite, delete and edit the permissions of other participants. Furthermore, an administrator has access to "Settings & Backup" and to all documents with restricted access permission. An administrator is authorised to edit and update the plans and documents of all roles in the project. Only an administrator can upload data on behalf of other roles by changing the author (thus the plans and documents are not stored under his own role but under that of the author).

Participant without login

Participants without a login have no access to the project and are only available as recipients for the manual sending of plans and documents (download link via e-mail). In the participant detail view, the receipt can be checked (click on Participate - see activities below, e.g. "Download"). No project invitation e-mails and upload messages are sent to participants without login. However, participants without login can be listed as authors so that, for example, a surveyor's plan can be found under the role "Surveyor".

Recommendation: We recommend sending bid request packages (zip files) in a separate award project to participants without login! (Advantages: Recipients and specialist planners do not see bidders and sensitive data such as offer evaluations, contracts, etc. can be managed without access permission). Plot orders are also processed by sending plans manually to participants without login, whereby the order data is entered via text message.

Plan review permission

As soon as there is at least one participant with a permission to approve plans in the project, the plan review system is active. Now, when uploading a plan, it can be selected whether the plan should be reviewed, by whom and by when.

The review of documents can always be requested by all participants.

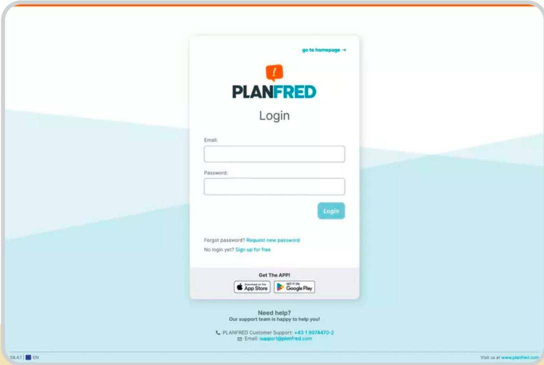
Deleting Participants or Revoking Project Access

If a participant is deleted or project access is revoked (right-click on participant and select ***Delete participant*** or ***Edit permission***), all download links in upload messages that have already been sent are deactivated. In the case of deleted participants, download links in dispatch e-mails are also deactivated. Deleted participants and participants without login no longer have access to the project. Deleted participants are moved to the recycle bin (activities can still be accessed in the recycle bin. They can be restored at any time).

Basic Functions

B1 Create password / login

Your free PLANFRED user account is automatically created when you receive your first project invitation. There is no need to register again. Simply click on ***Create password*** in the invitation e-mail and choose your desired password in the following step.



You can now always log in with your e-mail address and password at:
app.planfred.com

With your PLANFRED credentials you have access to all the projects you have been invited to. Under ***Projects*** (top centre) you can switch between projects.

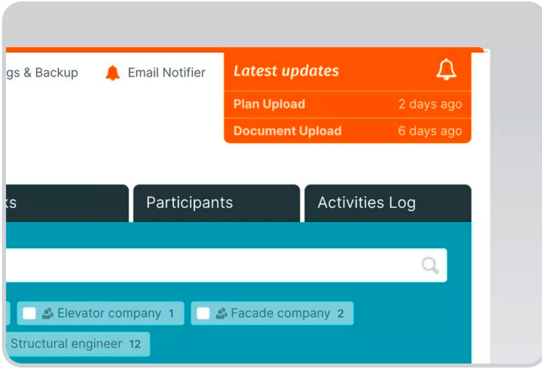
HINT
The password can be requested again at any time during login. Change the password in the ***User account*** (top right).

Basic Functions

Plans and Documents

B2 **Email Notifier**

PLANFRED sends automatic notifications for new uploads of plans and documents, provided that the "Upload Alert - Plans & Documents" is activated in the project. In the ***Email Notifier*** (top right) of the respective project, a participant can activate and deactivate the "Upload Alert - Plans & Documents" himself. If ***Daily*** is selected, PLANFRED sends a collective e-mail of all new uploads of the last 24 hours at midnight.

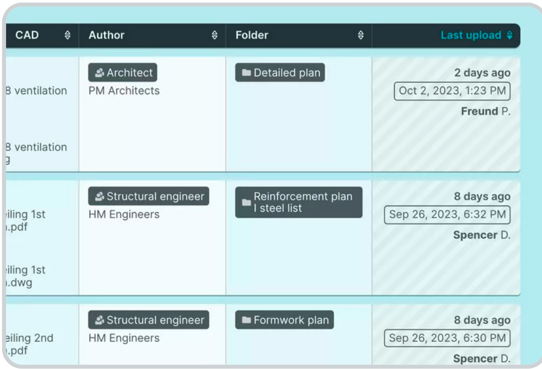


Furthermore, individual project settings for the following notifications from PLANFRED are possible in the Email Notifier:

- Report - Plan & Document Reviews
- Report - Tasks
- Reminder for Due Dates
- Weekly reminder

B3 **Sort plans or documents by most recent upload**

The best overview of new uploads in the project is obtained by sorting the list views according to the last upload.



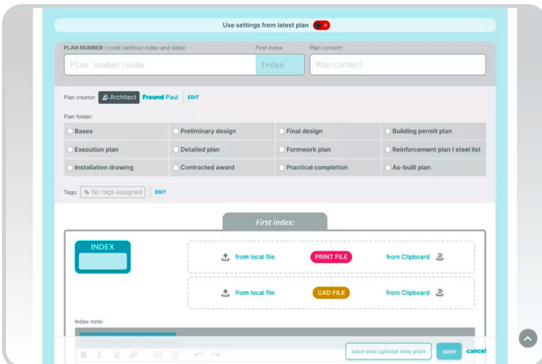
Tab Plans or Documents

- Activate filter ***Show all*** (top left)
- Click on ***Last upload*** (right in list header)
- Filter by "Roles/Plan creator/Author" and "Plan or Document folder"
- Preview by right-clicking on plan or document and selecting ***Open PDF***
- Download multiple plans or documents by clicking on ***Download*** (blue button above list on the right)

HINT
The list can be sorted according to all criteria in the black list header.

B4 **Upload New Plan**

ATTENTION: Each plan is created only once and must then be updated. Plans must not be created more than once so that the last status remains unique! Obsolete indices can be called up in the plan detail view (click on the plan, then under "Index history").



To create a new plan, follow these steps in the Plans tab:

- Click on ***Upload New Plan***
- Select print file (pdf, ...) ***from local file*** system or ***from Clipboard***
- Select CAD file (dwg, ...) ***from local file*** system or ***from Clipboard***
- File name is automatically transferred to the plan number field
- Edit plan number/code: Remove index and date and enter in the "Index" field (the number remains unchanged in case of updates)
- Enter description in the "Plan content" field (search accesses terms)
- Select Plan folder
- Optionally select tags (filter) or create tag: Enter in field "New tag" and click on **+**
- Optionally write an Index note
- Optionally require a review

- Click on ***save and upload new plan***

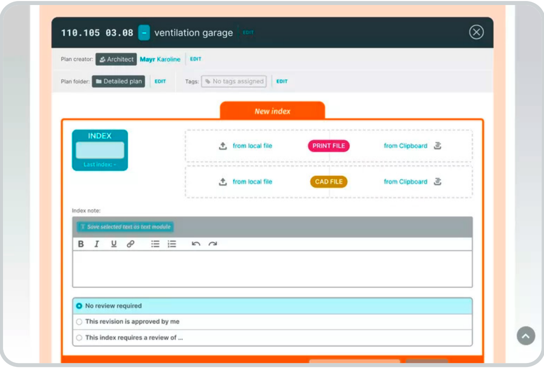
NOTE: All file formats can be uploaded, including zip packages (e.g. as-built plans). PLANFRED does not prescribe any plan coding. Each participant can create plans with their own coding system.

> **HINT**
> Plan number/content, plan creator, plan folder, etc. can be changed subsequently: Right-click on the plan in the list view, select the desired option in the pop-up window, make the change and ***save*** it.

> **HINT**
> If, for example, the plan folder is to be changed for several plans: Click on ***Edit*** (blue button on the right above the list), select plans by means of a checkbox, click on the ***Edit*** button at the bottom, activate the plan property ***Plan folder***, select the desired plan folder and click on ***Update x Plans***.

B5 **Upload Revised Plan**

ATTENTION: A plan that has already been uploaded must be updated! Outdated indices are available in the plan detail view (click on the respective plan).



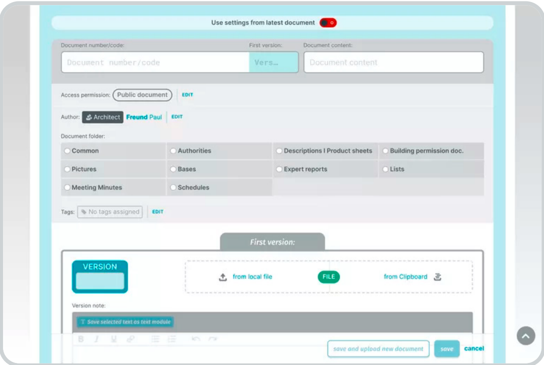
Plans tab

- Click on ***Upload Revised Plan***
- Select the plan to be updated
- Select print file (pdf, ...) ***from local file*** system or ***from Clipboard***
- Select CAD file (dwg, ...) ***from local file*** system or ***from Clipboard***
- Enter index
- Optionally write an Index note
- Optionally require a review
- Click on ***Save index and return to list***
- Select the next plan to be updated ...

> **HINT**
> With Right-click you can open and upload a revised plan in a new window (tab). Any number of windows (tabs) can be opened in parallel.

B6 **Upload New Document**

ATTENTION: Each document is created only once and must then be updated. Documents must not be created more than once so that the last status remains unique! Obsolete versions can be called up in the document detail view (click on the document, then under "Version history").



To create a new document, follow these steps in the Documents tab:

- Click on ***Upload New Document***
- Select file ***from local file*** system or ***from Clipboard***
- File name is automatically transferred to the document number field
- Edit document number: Remove version and date and enter in the "Version" field (the number remains unchanged in case of updates)
- Enter description in the "Document content" field (search accesses terms)
- Optionally restrict access: click on ***EDIT*** Access permission, select ***Restricted***, select participants and ***save***
- Select Document folder
- Optionally select tags (filter) or create tag: Enter in field "New tag" and click on **+**

- Optionally write Version note
- Optionally require a review
- Click on ***save and upload new document***

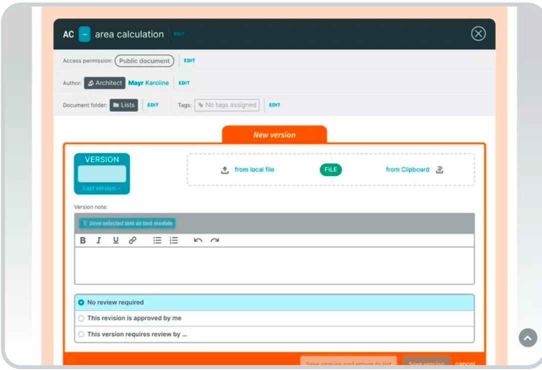
NOTE: All file formats can be uploaded, including zip packages (e.g. photos). PLANFRED does not prescribe any document coding. Each participant can create documents with their own coding system.

HINT
Number/content, author, access permission etc. can be changed subsequently: Right-click on document in list view, select the desired option in the pop-up window, make change and ***save*** it.

HINT
If, for example, the tags of several documents are to be changed: Click on ***Edit*** (blue button on the right above the list), select the documents using the checkbox, click on the ***Edit*** button at the bottom, activate the document property ***Tag***, select the tags and click on ***Update x Documents***.

B7 **Upload Revised Document**

ATTENTION: A document that has already been uploaded must be updated! Outdated versions are available in the document detail view (click on the respective document).



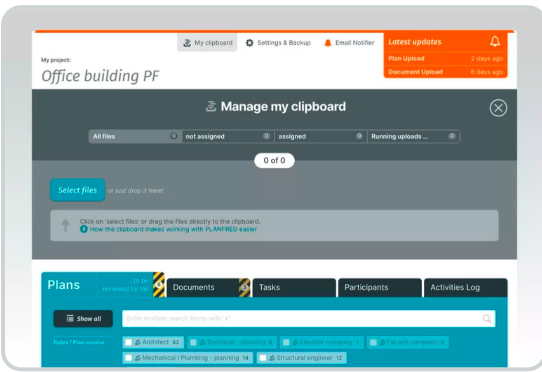
Documents tab

- Click on ***Upload Revised Document***
- Select the document to be updated
- Select file ***from local file*** system or ***from Clipboard***
- Enter version (or date e.g. "200930")
- Optionally write a Version note
- Optionally require a review
- Click on ***Save version and return to the list***
- Select the next document to be updated ...

HINT
To open and update a document in a new window or tab, simply right-click on the document and select the option to open it in a separate window or tab.

B8 **Clipboard – Upload multiple plans or documents**

PLANFRED offers two functions that make uploading of multiple plans for the first time much easier. The use of the clipboard ensures that no plans are overlooked and the possibility to use settings from the latest plan saves time. When uploading revised plans and documents, it also makes sense to load all files to the clipboard first, as this ensures that no documents are forgotten.

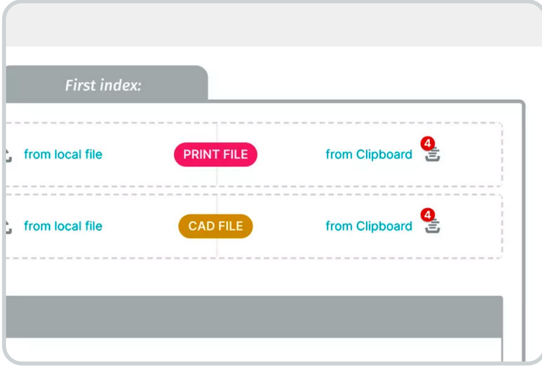


First the clipboard is filled with files:

- Click on ***My clipboard*** (top centre)
- Load all CAD and/or print files of the new plans to be uploaded into the clipboard: either click on ***Select files*** or simply drag them from your own system into the clipboard
- Close the clipboard (click on the x in the upper right corner), the files will be uploaded in the background

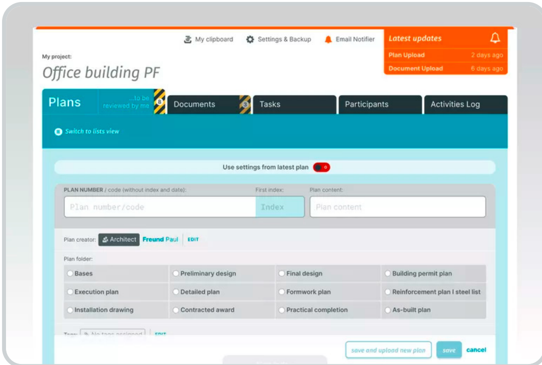
Then the first plan is uploaded and fed with the corresponding files from the clipboard:

- Click on ***Upload New Plan***
- Insert print file from the clipboard: Click on ***from Clipboard*** in the right area of the PRINT FILE field and select the desired file in the pop-up window
- Insert CAD file from the clipboard: Click on ***from Clipboard*** in the right area of the CAD FILE field and select the desired file in the pop-up window
- Enter index and Plan content; edit Plan number; select Plan folder, Tags, etc.; if necessary, write a note and/or require a review
- Click on ***save and upload new plan***



When uploading further plans, the settings of the latest plan can be used:

- Click on ***Use settings from latest plan***
- The selection of settings to be applied can be edited (click on the checkmarks)
- Update and save the plan as described above



This process is repeated until no more plans are available for selection in the pop-up window of the clipboard - the list is thus cleared. Click on ***My clipboard*** (next to "Settings & Backup") to see that all files in the clipboard have the status "assigned".

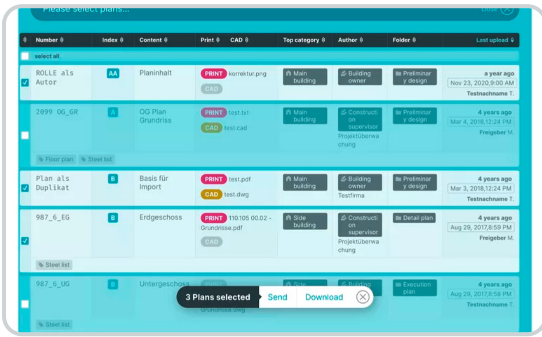
ATTENTION: Each plan is uploaded only once and must be updated when changes are made. Plans must not be uploaded more than once so that the last status remains unique!

HINT
The files in the clipboard can be sorted e.g. by file name (click on ***File name*** in the list header).

B9 **Download multiple plans or documents**

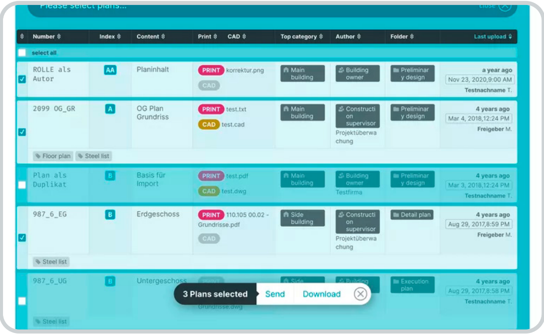
Register Plans or Documents

- Click on ***Download*** (blue button above list on the right)
- Filter by Role/Creator, Plan or Document folder, Tags (or enter in search field)
- Select plans or documents by checkbox (select all by top checkbox)
- Click on the ***Download*** button (at the bottom)
- Select folder structure (recommendation: ***Folder/Original)***
- Click on *Download files*



HINT
Plans and documents can be sorted by all criteria in the black list header. Preview by right-clicking on a plan or document and selecting ***Open PDF***.

B10 **Send multiple plans or documents**



Register Plans or Documents

- Click on ***Send*** (blue button on the right above the list)
- Filter by Role/Creator, Plan or Document folder, Tags (or enter in search field)
- Select plans or documents by checkbox (select all by top checkbox)
- Click on the ***Send*** button (at the bottom)
- Select recipients or
- Optionally add further recipients: Click on ***+ Add recipient***, enter details and click on ***add***
- Write message
- Optionally create signature template
- Optional for plans "Send PRINT files only"
- Click on ***send***

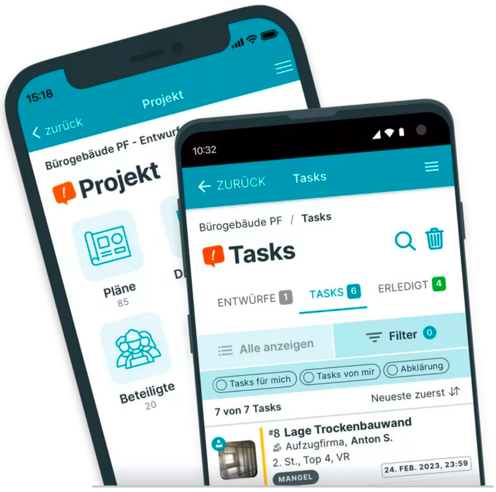
HINT
Save recipient selection as personal recipient group: Click above on ***+ Create recipient group***, enter name and click on ***save***.

HINT
Save message as personal template: Select parts or all of the text, click on ***Save selected text as text module***, enter the text module name and ***save***.

B11 **Tasks in general**

Project owners and Project administrators have access to all tasks and can comment on and edit them at any time.

Project participants see tasks that have been assigned to them or to another participant with the same role. On the other hand, those tasks appear that were created by the participant himself or by a participant with the same role.



PLANFRED Tasks in the browser

Tasks can be created and edited in the browser web app (app.planfred.com). As with plans and documents, they are displayed in a list. The display can be specified via the filter functions.

Under ***Settings & Backup*** (top right in the respective project), the following individual settings can be made under "Tasks":

- Rename, delete (click on **x**) or add Task categories (write the name in the "New task category" field and click on **+**).
- Add a fourth option to the location of Tasks (activate the location property "Building"), rename, delete location specifications (click on **x**) or add new ones (write the name in the relevant field and click on **+**).

PLANFRED tasks on the smartphone

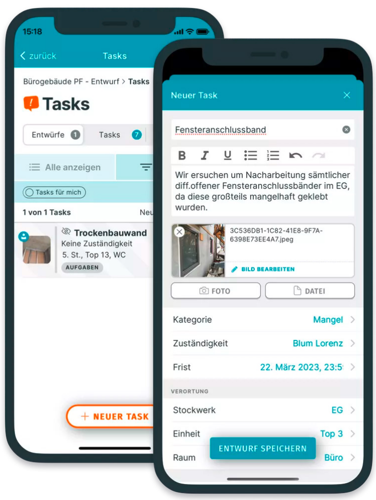
Tasks can be created directly on the mobile phone to save time. The app for iOS and Android makes recording tasks even easier - and **free of charge in all PLANFRED packages**, whether Mini, Midi, Maxi or Prime.

- Download in App Store
- Download from Google Play Store

Login to the app is the same as in the browser web app by entering your user data. The project list is then displayed. Clicking on the desired project and opening the "Tasks" tab takes you to the list view. Here, too, the display can be categorised using the filter functions.

B12 **Create new task in the smartphone app**

- Click on ***+ New Task***
- Enter Title and Description
- Take pictures directly by clicking on ***Photo*** and ***edit image*** if necessary (insert text, marker, etc.)
- Add files by clicking on ***File***
- Select Assignee
- Select Category, assign a Due date if necessary and add location information
- Finally, either ***save draft*** or ***Publish immediately***



Tasks saved as drafts can be completed later, e.g. on a laptop, and are only visible to the creator until they are published.

To publish a task, the assignee must be determined and at least one parameter (Title, Photo, etc.) must be filled in. Then activate the checkbox ***Publish immediately*** and click on ***PUBLISH***.

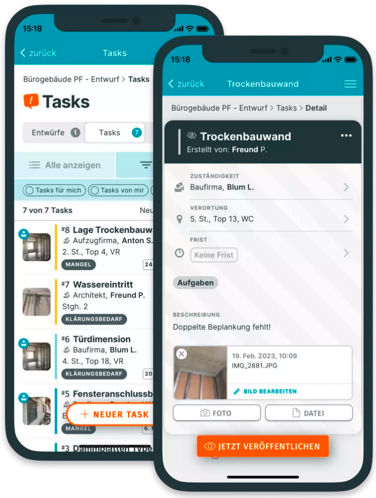
HINT
The dictation function of the smartphone can also be used to enter texts (e.g. description of a task).

B13 **Publish Task**

Once a task has been saved as a draft, it can be opened at any time under "My drafts" and completed or corrected.

To publish a draft task, first click on the desired task in the list and then on ***Publish task***.

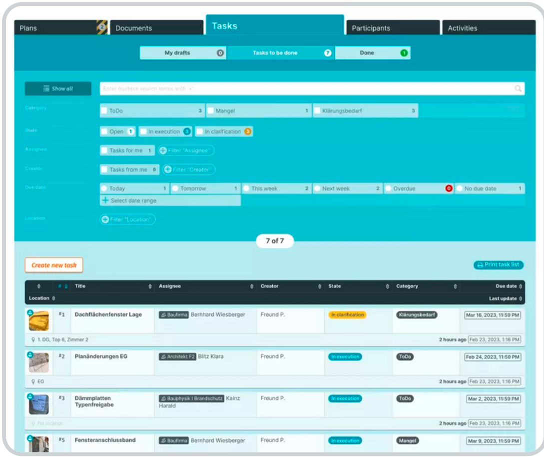
After publication, the task is visible to the assignee, his role, the Project owner and all Project administrators.



B14 **Tasks in the browser web app**

The web app in the browser displays the newly published task as shown. If it does not appear at the top of the list, you can sort it by clicking on the number symbol on the left in the list header.

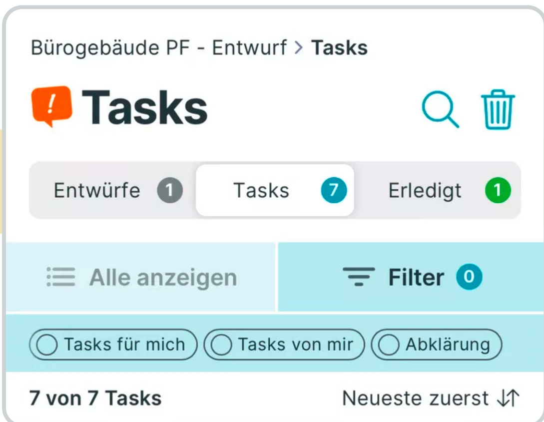
To create a task in the web app, click on the button ***Create new task***. All further steps are carried out in the same way as in the smartphone app (see above).



B15 **Tasks - Filter**

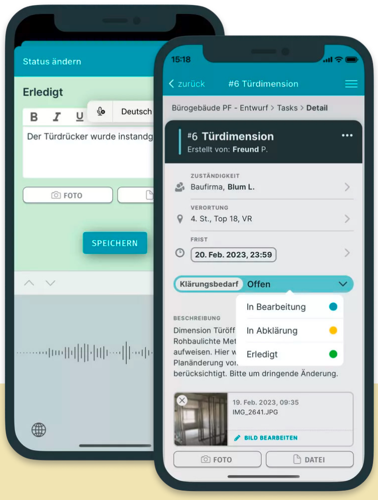
In addition to the usual filter functions of the browser web app, there are three quick filters in the smartphone app: ***Tasks for me, Tasks from me*** and ***Clarification***.

HINT
To deactivate all filters, click on the ***Show all*** button.



B16 **Tasks - Status**

A task is marked in the smartphone app with different colour bars (on the left in the list view) depending on its status. The status of a task can be ***Open*** (light blue), ***In execution*** (dark blue), ***In clarification*** (yellow) or ***Completed*** (green).



The status can be changed as follows:

- Click on the task to get to the detailed view
- Click on the coloured status bar and select the desired new status
- if necessary, enter text in the text field (this appears in the Task activities)
- add a photo or file if necessary
- ***save***

HINT
Changing the status is also possible in the course of entering a new message. The input field for a new message is located directly below the heading "Task activities".

B17 **Tasks - Notifications**

The **task report informs** about all new and changed tasks **by e-mail every hour**. Participants only receive information about the tasks they can view (tasks assigned to them or the role and tasks they have created themselves). Automatic notifications can be deactivated at any time in the Email Notifier in the browser web app.

By activating the push notifications on the smartphone, one is also directly informed about all changes. Clicking on the push-up notification takes you directly to the task.

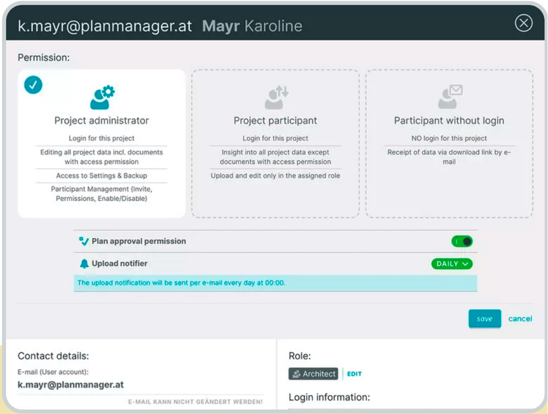
Special Functions

S1 The permission system briefly explained

Project owner

Every user (regardless of whether they are registered themselves or a participant) is authorised to create their own projects and is therefore the owner of all this data. As the project owner, he is the only person authorised to delete these projects. Access to his projects can never be withdrawn from him as the owner.

After 30 days, a project owner's user account becomes chargeable. Invoicing does not take place automatically, but only after a package has been ordered in the user account.



HINT
We recommend using a non-personalised e-mail address for the project owner's user account (subject to payment). All projects are created with the login of this user account - so this e-mail address is in possession of all data. The respective project leader is invited as a participant with administrator rights and manages the project from now on.

Project administrators

Project administrators have almost the same rights in the project as the project owner. However, they cannot delete the project and cannot withdraw project access from the owner. An administrator is authorised to create and delete other participants and to edit their permissions. Furthermore, an administrator has access to "Settings & Backup" and to all documents with restricted permission. An administrator can edit or update all plans and documents of other roles and can also upload data on behalf of other roles by changing the creator/author (this means that the plans and documents are not stored under their own role but under that of the creator/author).

Project participants

Project participants can only use their PLANFRED access data to log in to projects to which they have been invited. With their project login, participants are authorised to download all project data and upload their plans and documents, whereby these are automatically stored under the assigned role. Each participant can only update or edit data for their own role. A participant only has read-only rights to plans and documents of other roles. For a team of several structural engineers, for example, it is therefore important that they are assigned the same role when the project is invited.

Participants without login

Participants without login do not have access to the project. They are only available as recipients for the manual dispatch of plans and documents. A download link is sent via e-mail. Both receiving and download can be checked in the "Activities Log" tab (click on ***+ Filter "Participant/Role"***, activate the desired category, select the participant and click on ***Show***). No project invitation e-mails and upload messages are sent to participants without login. However, participants without login can be listed as creators/authors so that, for example, a surveyor plan can be found under the role "Surveyor".

HINT
We recommend sending tender packages (zip files) in a separate award project to participants without login! ADVANTAGES: Recipients and specialist planners do not see bidders and sensitive data such as tender reviews, contracts, etc. can be managed without access permissions. Plot orders are also processed by manually sending plans to participants without login, whereby the order data is entered via text message. In the "Download" activity category, you can check whether the plans or documents have been downloaded.

Permission to approve plans

As soon as there is at least one participant with permission to approve plans in the project, the review system for plans is activated. When uploading a plan, it must be selected whether or not a review is required for this plan. If a plan review is required, the corresponding participants with permission to approve plans are activated in the list.

A participant is automatically informed by e-mail when a plan is waiting to be reviewed. The participant can now either send an index approval or save a comment (as text and/or file). Status updates are sent hourly by e-mail to the plan author and all participants with the same role.

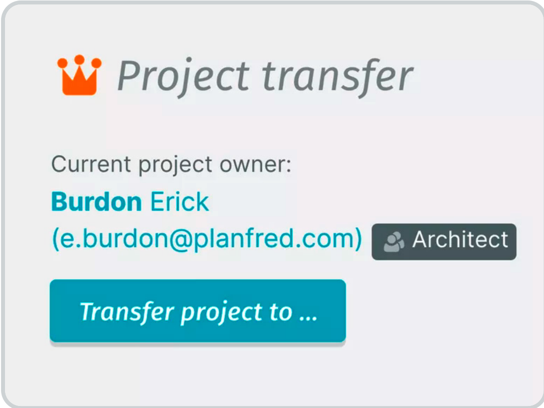
The review system is always active for documents. A document review can be requested by all participants at any time.

Delete participant or revoke access to the project

If a participant is deleted (right-click on Participant and ***Delete participant***), all download links in e-mails already received are deactivated. Furthermore, project access can be withdrawn from a participant by changing their permission to "Participant without login". Deleted project participants and participants without login no longer have project access. Deleted participants are moved to the recycle bin. All activities can still be called up in the recycle bin and participants can be restored at any time.

S2 **Project transfer – change of project owner**

Project owners can easily transfer individual projects to participants. All rights (e.g. ownership of data, allocation of access rights) and obligations (e.g. payment obligation) are transferred to the new owner. The prerequisite for any project transfer is that the future owner address is a participant in the project and the account is provided with a plan selection.



Project owner is in the test phase, although his office has already commissioned a PLANFRED subscription plan:

The Test phase message appears if a user has created their own project but their account is not provided with a plan selection. With PLANFRED, all projects in an office should be owned by the user account that is liable to pay. With the "Project transfer" function, projects can be transferred to the assigned office user account at any time and continued seamlessly.

Procedure:

- login of the project owner to the project to be transferred
- create the future project owner (authorised office user account) as a project participant
- under ***Settings & Backup*** (top right) click on ***Project transfer***
- now ***Transfer project to***, select new project owner and ***Start project transfer***
- The future project owner is automatically informed of the project transfer request by e-mail. Click on ***Apply and Accept Project*** in the e-mail to open PLANFRED in the browser, where the project can be accepted and the project transfer completed.
- After the transfer, the original project owner is no longer in the test phase, has administrator rights in the project and can also be deleted if necessary.

HINT
We recommend using a non-personalised e-mail address for the project owner's paid user account. All projects must be created via this user account - all data is therefore owned by this e-mail address.

Change the e-mail address of an authorised user account:

The "Project transfer" function can be used to change the user account of the project owner that is subject to payment. This account is only used to create new projects and to manage the order data.

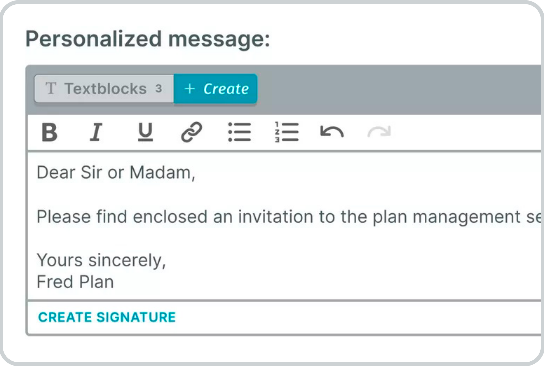
Procedure:

- create the future owner address as a participant in the projects that are to be transferred (recommendation: name only "-" and role e.g. "account")
- login with the future owner address, click on ***User account*** (top right), ***Plan selection*** (MINI, MIDI, MAXI or PRIME), select payment interval and enter billing address, logout
- login as project owner in each own project and carry out project transfer as described above
- after completing the project transfer, change the Plan selection to "FREE" in the user account of the original project owner

HINT
If a project is to be transferred to the builder, for example, who is not yet a participant, we recommend creating and inviting the builder as a new participant. This way, the registration is already done and the builder only has to provide his account with a plan selection.

S3 Textblocks

Whether for messages, review request or task descriptions - textblocks support PLANFRED users when composing texts. These blocks can be created and edited individually for the following applications:



- message when sending plans and documents
- review request
- index/version note when uploading new or revised plans/documents
- note on approval
- comment on the requested review
- description of a task
- composing messages within a task
- personalized message to new project participant

Procedure:

- type the message into the text field
- select part or all of the text
- click on ***+ Create***
- enter the name of the text block in the pop-up window
- edit text if required
- click on ***save***

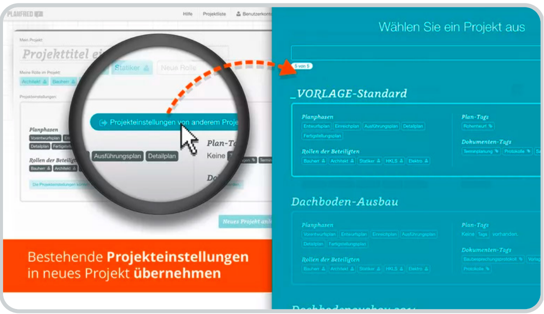
Click on ***Textblocks*** and then click on the desired block in the list to insert the text into the message field.

HINT
Any number of stored textblocks can be combined to form a message.

NOTE: Textblocks that were created for the document upload, for example, are NOT available for selection when, for example, review requests are created. They only appear where they were created and saved.

S4 Apply project settings

Plan folders, roles, and tags can be added from existing projects.



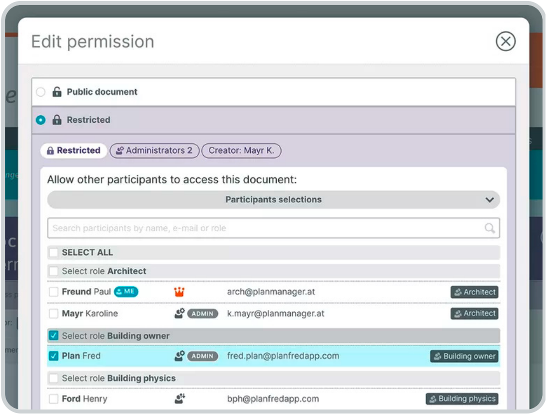
This means that the settings (plan folders, roles and tags) do not have to be re-entered each time new projects are created.

- when creating a new project, click on ***Apply project settings from another project***
- select the desired project from the list
- changes to the project settings can be made at any time at a later date

HINT
Save projects as a template: Create a new project, adjust settings and save as "_TEMPLATE-XY", for example.

S5 **Access permission for documents**

In PLANFRED, individual documents can be assigned an access permission in order to restrict visibility to selected participants. Administrators always have access to all documents.



Procedure:

- upload new document as usual
- click on ***EDIT*** Access permission
- click on ***Restricted***
- selection of participants
- ***save***

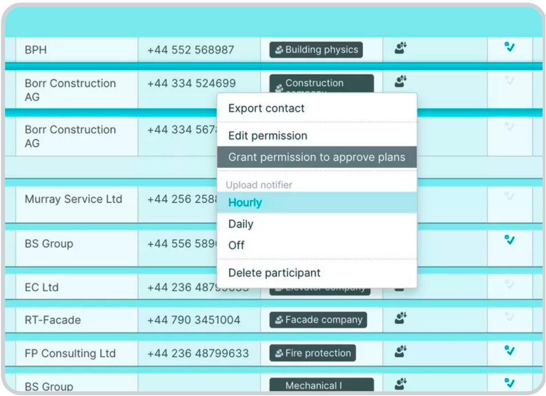
By right-clicking on a document and selecting ***Edit permission***, access can be subsequently restricted or edited.

HINT
Save selection of participants as personal preselection: Expand "Participants selections" (click on the triangle on the far right), click on ***+Create participants selections***, enter name and ***save***

NOTE: In the Project backup, all documents with restricted access are always available. Therefore, we recommend managing sensitive documents such as cost tracking, contracts, invoice audits, etc. in a separate project with a small group of participants.

S6 **Approval/Review of plans and documents**

The approval status of plans and documents is clear by means of a simple filterable traffic light system in the colors yellow (review requested), red (comments) and green (approved).



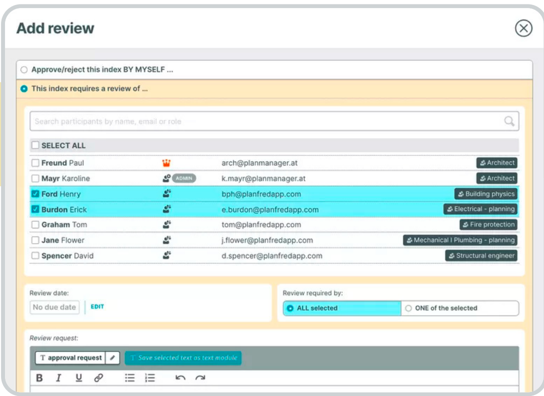
ATTENTION: A plan should only be approved and coloured green if all comments from the previous plan review have already been incorporated. It should also be recognisable from the index that the plan has been approved (no preliminary draft).

1.) Grant or revoke a participant a permission to approve plans

The review of plans can only be requested by participants with a permission to approve plans. These are marked with a tick in the list of participants.

- Right-click on a participant and select ***Grant permission to approve plans*** or ***Revoke permission to approve plans***

HINT
The review of documents can always be requested by all participants.

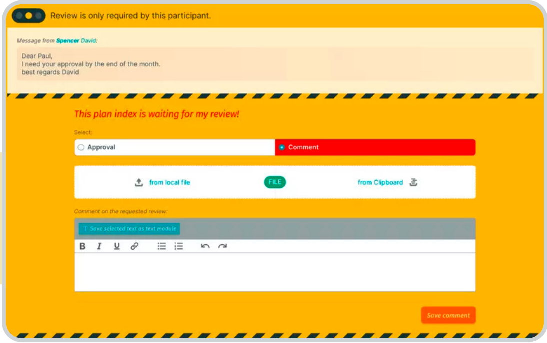


2.) Request review

Each participant can request a review when uploading a new or revised plan.

- selection at the bottom ***This index requires a review of***
- select the participants who should review the plan
- optionally add review date and text message
- click on ***save***
- the reviewers are automatically notified by hourly collective e-mails

ATTENTION: During the first test run of a plan that has not yet been approved, the preliminary draft status should be recognisable from the index (e.g. "prelim"). The reviewers then add their comments (file and text) to the plan - the original plan remains unchanged.



HINT
With the filter ***... to be reviewed by me*** (next to the Plans and Documents tab), each participant has an overview of all review requests by him.

Requesting a review at a later date, changing the reviewers or review date

Right-click on the respective plan and select ***Add review*** or ***Edit review***.

3.) Reviewers comment on plan or approve plan

- in the Plans tab, click on the personal filter ***... to be reviewed by me***
- select and download the plan (if necessary, download the other reviewers' comments as well) and correct it
- select one of the options ***APPROVAL*** or ***COMMENT***
- with ***APPROVAL*** write text message and ***Send index approval***
- for ***COMMENT*** add file and/or text message and ***Save comment***
- the plan authors (entire role) are automatically notified by hourly collective e-mails

HINT
An approval with comments is handled with the COMMENT option, as various small details (including the approval index) still have to be incorporated into the original plan and it should therefore not be marked as approved. The plan author then delivers the approved plan with a clear index and can then colour it green (approved) himself.

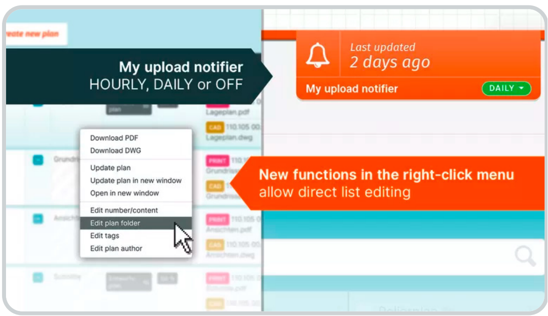
4.) The plan author incorporates the comments and updates the plan

- the plan author reworks the plan
- click on ***Upload Revised Plan*** and upload plan with new index
- depending on the result of the previous plan review, the plan author requests a new review or marks the plan as approved by selecting the option "This revision is approved by me" (he has already received approval in the form of a comment)
- Click on ***Save index***

HINT
Every Monday, a weekly report of all plan and document reviews is automatically sent. Each participant can set in the project in the ***Email Notifier*** (top right) which automatic notifications are to be sent.

S7 **Edit directly in the lists**

The right-click menu can be used to make changes directly in the list without having to open the detailed view.



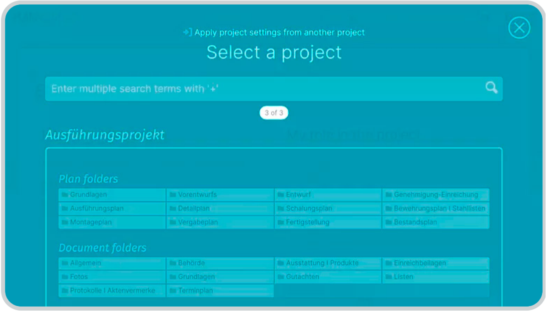
Procedure:

- filter the plans or documents to be edited in the list view
- sort by e.g. plan number by clicking on *Number/Code* in the heading line
- click on a plan with the right mouse button
- Select the desired activity:
  - Download PDF or DWG
  - Update plan, open in new window ...
  - Edit number/content
  - Edit plan creator

  - Edit plan folder
  - Edit tags
  - Add or Edit review
- make changes
- ***save***

S8 Importing plans and documents from another project

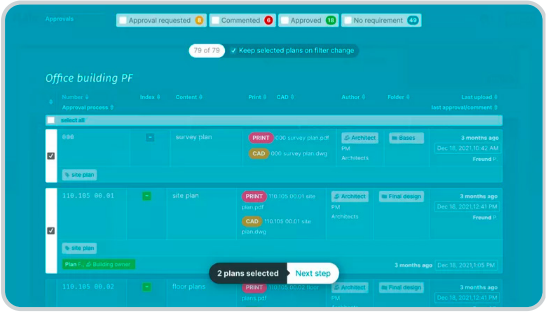
With PLANFRED, all project participants always have access to the entire set of plans. However, individual documents can be assigned an access permission. Higher-level access permission is granted via different projects. Administrators can import all relevant plans and documents from another project with just a few clicks.



Example 1: Continuing execution project

After the building permit procedure has been completed, an execution project is created. All relevant plans and documents are imported into the execution project, resulting in a cleaned-up project for the respective companies.

ATTENTION: Before the first import of plans, for example, make sure that the plan numbers do not contain an index or date. PLANFRED compares the plan numbers of both projects (including those in the recycle bin) during the transfer process and existing plans in the target project are updated if necessary (e.g. with a new index).



Procedure:

- ***+ New project*** e.g. execution project and ***Apply project settings from another project*** e.g. from the approval project
- in the execution project, click on ***Import Plans from a different project*** (button next to "Upload New Plan" - only visible to administrators) and select the project from which the plans are to be imported
- filter plans and select using the checkbox
- click on ***Next step*** at the bottom
- select import settings (only when importing approved plans and documents)
- click on ***Import x plans***

Import documents from another project in the same way.

HINT
Only the current index of a plan or the current version of a document is imported. The history can only be accessed in the source project.

HINT
Participants can also be imported from a different project. You can set them to be imported as "participants without login". Subsequent invitation: Right-click on participant in the list, select ***Edit permission***, enter contact details first if necessary, assign role and click on ***EDIT PERMISSION***, select Project participant or administrator, optionally write message and ***save & invite to project***

Example 2: Separate project for plan approvals

If, for example, various plan changes are not to be visible to the executing companies, it is advisable to work on these in a separate project with a small group of participants. Once the plan changes are completed, the approved plans are imported back into the main project (existing plans are updated) and thus published.

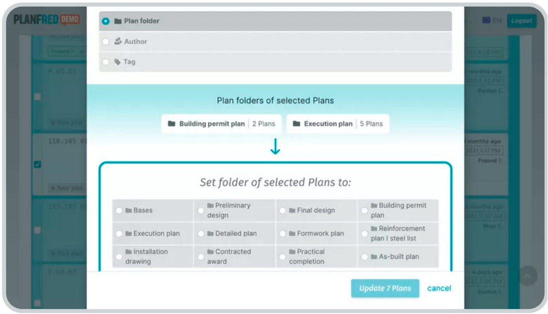
Procedure:

- create a new coordination project and import the desired plans from the main project
- edit plans in the coordination project as usual (request reviews, upload revised plans, etc.)
- now import the plans to be published from the coordination project into the main project (target project)
- check the list of existing plans in the target project and the associated indices selected for import and choose between the options ***Upload Revised Plan*** (***update all*** below) or ***Create as new plan***
- click on ***Next step***
- select import settings and click on ***Import x plans***

HINT
If the most recent plan index already exists in the target project, it cannot be imported again (plan selection is not possible). Plans that are in the review process (coloured yellow and red) cannot be imported either.

S9 Change the properties of several plans at once

The “Multi-Edit” function allows you to quickly edit the properties of several plans at once. With a few clicks, plan folders, authors, tags or reviews of different plans can be changed simultaneously.



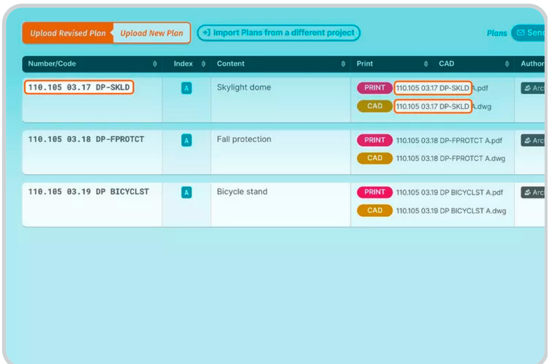
An example of Multi-Edit

Several execution plans are to be moved to the installation drawings folder:

- click on ***Edit*** next to “Upload Revised Plan” or “Upload New Plan”
- display the execution plans with the help of the filter system
- select the plans to be changed by clicking on the checkbox (to the left of the plan number) or click on ***Select all***, if all filtered plans are to be edited
- click on ***Edit*** in the lower center of the screen
- select the desired plan property rubric ***Plan folder*** by clicking on it
- click on ***Installation drawing*** to change the plan folders of the selected plans
- finally click on ***Update x plans***

S10 Update multiple plans automatically

PLANFRED compares the plan files in the clipboard with the numbers/codes of plans that have already been uploaded. This allows the files to be automatically assigned to the respective plans and then updated. To do this, first fill the clipboard with the new plan files and then click on ***Automatically update plans***.



The assignment works optimally if the plan files are always labelled the same, namely **the fixed part at the front – the plan number/code** and the variable part at the end – the index (or date - max. 6 characters).

Examples of file designations and plan number/code (freely selectable):

- **110.105 03.17 DP-SKLD** A.pdf – associated plan number: **110.105 03.17 DP-SKLD**
- **Arch_Lp5_GR_EG_** 01.dwg – associated plan number: **Arch_Lp5_GR_EG_**

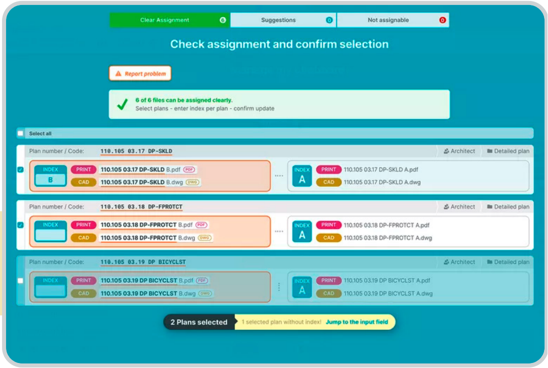
For plans that have already been uploaded (see "Plans" tab), the "Number/Code" field must not contain an index (or date), as the plan number must appear in full in the file name so that the assignment of the new plan files is unique.

Procedure Automatically update plans:

- Click on ***My clipboard*** (top centre)
- Drag and drop plan files to the clipboard or click on ***Select files***
- Click on ***Automatically update plans***

- Check the list under ***Clear Assignment***
- Select the plans to be updated using the checkbox on the left or ***Select all*** at the top
- Enter the index in the field
- Click on ***Update now***

HINT
Plan Reviews can be added subsequently using "Edit" (see below).



Reasons why files cannot be clearly assigned - under "Suggestions" or "Not assignable":

- The plan must be uploaded anew
- The file is a document
- The "Number/Code" field contains an index or date - the field must be edited: Right-click on plan, select ***Edit number/content***, delete index or date and ***save***

Empty clipboard last:

As soon as all files in the clipboard are marked as assigned (visible to everyone in the project) with a green tick, the clipboard can be emptied: Click on ***x*** (top right) and click on ***empty current list***

Add plan reviews retrospectively:

- In the ***Plans*** tab, filter the desired plans and sort the list by Last upload
- Click on ***Edit*** (blue button on the right above the list)
- Select plans using the checkbox
- Click on ***Edit*** at the bottom
- Select ***Review***
- Selection below ***This index requires a review of***
- Select reviewers, optionally add Review date and Review request
- Click on ***Update x plans***

The reviewers are automatically notified by hourly collective e-mails.

If you have any questions,
please do not hesitate to contact me personally.

DI Martina Schmid
Sales, Customer Service

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Email: support@planfred.com