PLANFRED

PLANFRED-Manual

Manual for Participants & Project managers ENv25-10

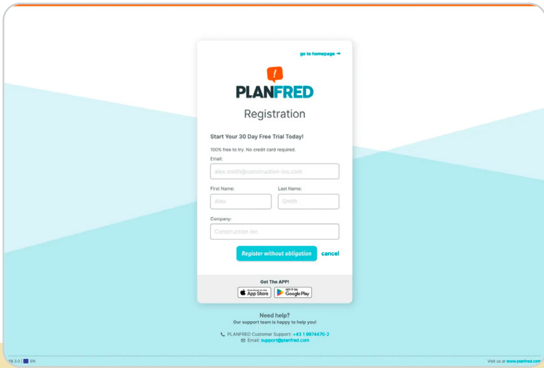
Administrators and Owners

Basic Functions

Special Functions

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.

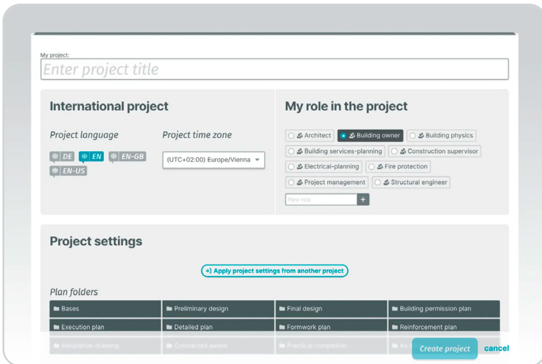
Follow the instructions in the confirmation e-mail to create a user login.

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:

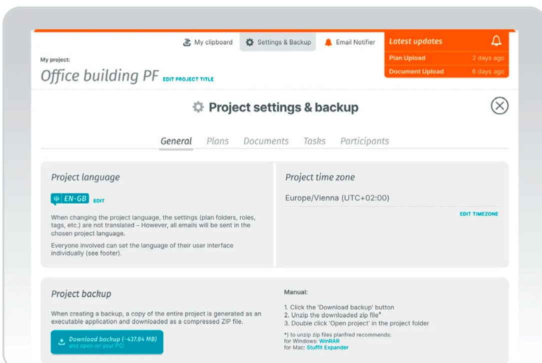
- Click ***+ New project***
- Enter the project title
- Select your role in the project. If the desired role is not available, enter it in the "New role" field and click **+** to add it.
- Click ***Create project***

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
With the ***project transfer*** function (top right under "Project" click on "Settings & Backup"), you can transfer your project to the ownership of a participant with a chosen Plan selection. If you no longer have your own project, you are no longer in the trial phase.

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.

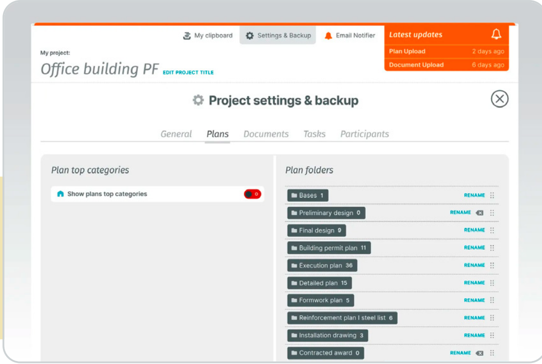
NOTE: Filters for roles and tags will only be displayed if plans or documents with these attributes exist.

Settings & Backup (under "Project")

Customize Plan and Document folders

- ***rename*** and ***save*** folders

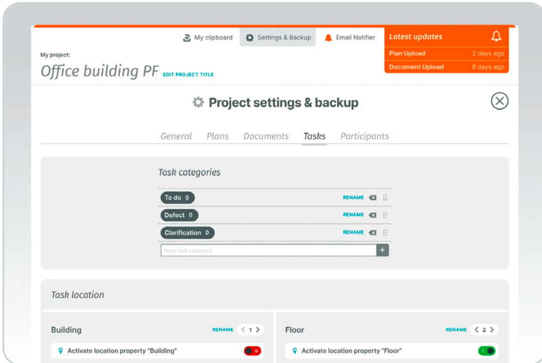
- Delete folders by clicking the **x** button (on the right)
- Add new folder: Enter a name in the “New plan folder” or “New document folder” field and clicking the **+** button
- Change order of folders: Click on the dots symbol on the right and move it to the desired position



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)



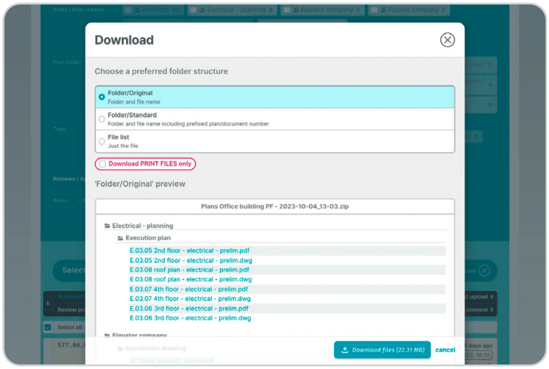
Rename or add roles of the participants

- ***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.

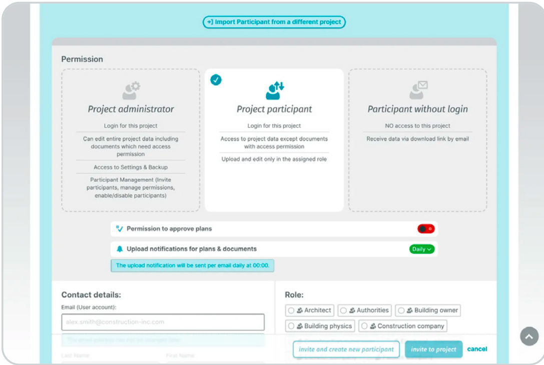
Tags - Additional Filtering Options

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 ***+ New participant***
- Enter e-mail address
- Select permission: ***Project participant, Project administrator*** or ***Participant without login***
- Optional grant permission to review 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 + create new participant***

HINT
Participants who have already been created can be transferred to other projects by clicking on ***Import Participants***.

It is also possible to import contacts from your own address book: ***+ New participant*** and ***Import .vcf***

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

HINT
In the participant detail view (click on Participant) under ***permission: EDIT*** (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 review 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).

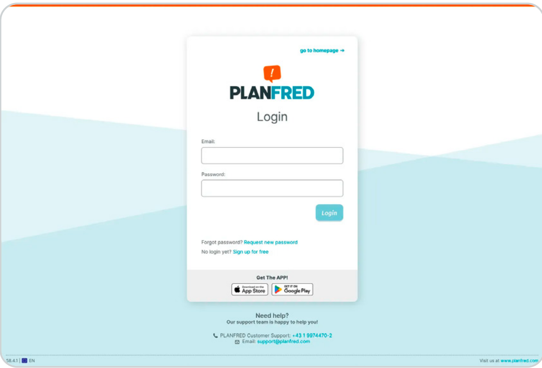
Basic Functions

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 center) you can switch between projects.

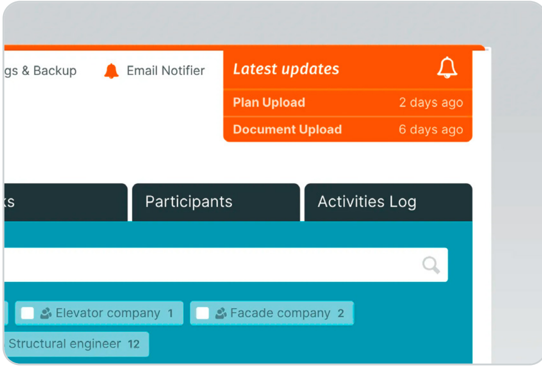


HINT
The password can be requested again at any time during login. Change the password in the ***User account*** (top right).

Basic Functions

Plans and Documents

B2 **Email Notifier**

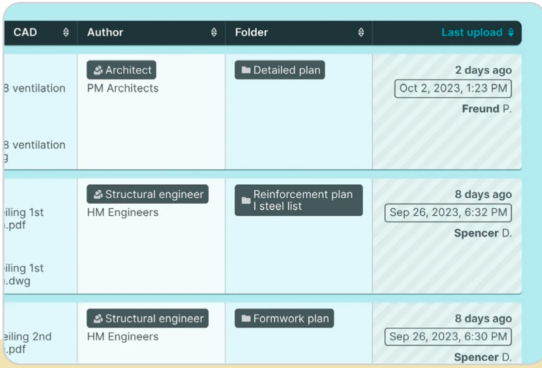


When new plans and documents are uploaded, PLANFRED sends automatic notifications, provided that the “Upload Alert - Plans & Documents” button is activated in the project. A participant can enable or disable the “Upload Alert - Plans & Documents” for each project themselves. The ***Email Notifier*** can be accessed, for example, by clicking on the orange field with the bell icon. If ***Daily*** is selected, PLANFRED sends a collective email at midnight containing all new uploads from the last 24 hours.

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**



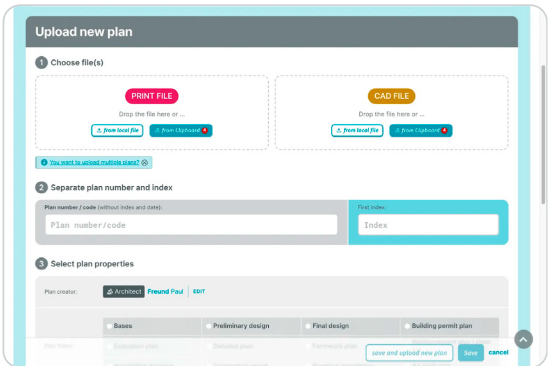
The best overview of new uploads in the project is obtained by sorting the list views according to the last upload.

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/status/date and enter in the "Index" field (the number remains unchanged in case of updates)
- Select Plan folder
- Enter Plan description in the "Plan content" field (search accesses terms)
- Optionally assign tags (filter): Click on „EDIT“, select or create tag (Enter in field "New tag" and click on **+**) and „save“
- Optionally write an Index note
- Optionally require a review
- Click on ***save and upload new plan***

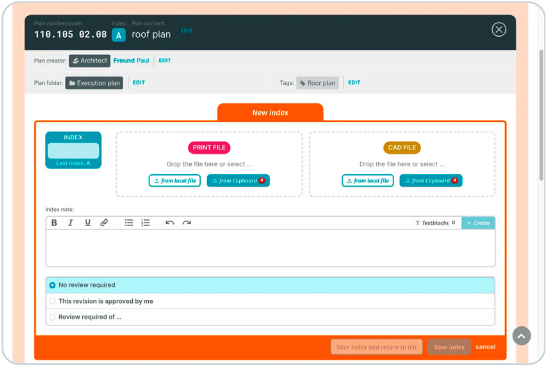
NOTE: All file formats can be uploaded, including zip packages (e.g. as-built plans). PLANFRED does not prescribe any plan coding. Each participant can create plans with their own coding system.

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).



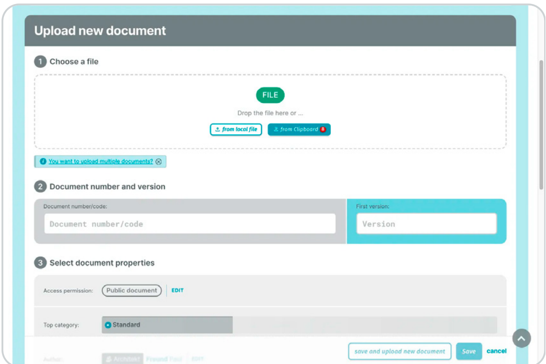
Plans tab

- 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/state
- 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)
- Optionally restrict access: click on ***EDIT*** Access permission, select ***Restricted***, select participants and ***save***
- Select Document folder
- Enter description in the "Document content" field (search accesses terms)
- Optionally assign tags (filter): Click on „EDIT“, select or create tag (Enter in field "New tag" and click on **+**) and „save“
- Optionally write Version note
- Optionally require a review
- Click on ***save and upload new document***

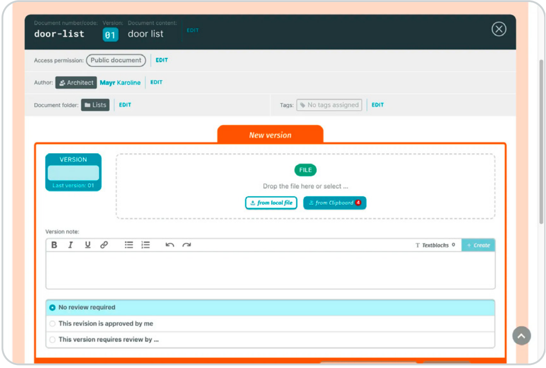
NOTE: All file formats can be uploaded, including zip packages (e.g. photos). PLANFRED does not prescribe any document coding. Each participant can create documents with their own coding system.

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).



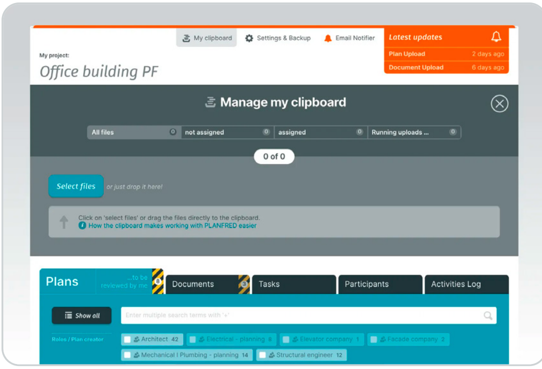
Documents tab

- 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

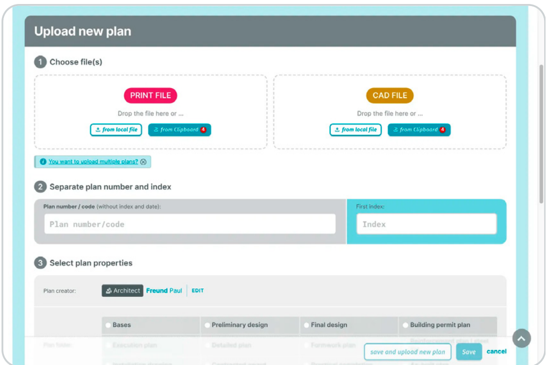
PLANFRED offers two functions that make uploading of multiple plans for the first time much easier. The use of the clipboard ensures that no plans are overlooked and the possibility to use inputs from the latest plan saves time. When uploading revised plans and documents, it also makes sense to load 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 center)
- 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
- Edit Plan number and enter Index/state
- Select Plan folder
- Enter Plan content and assign Tags if necessary
- optionally write an Index note and/or require a review
- Click on ***save and upload new plan***

When uploading further plans, the inputs from the latest plan can be used:

- Click on ***Use inputs 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

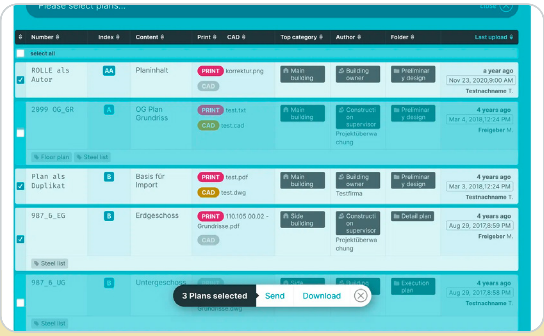
This process is repeated until no more plans are available for selection in the pop-up window of the clipboard - the list is thus cleared. Click on ***My clipboard*** (next to "Project") to see that all files in the clipboard have the status "assigned".

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

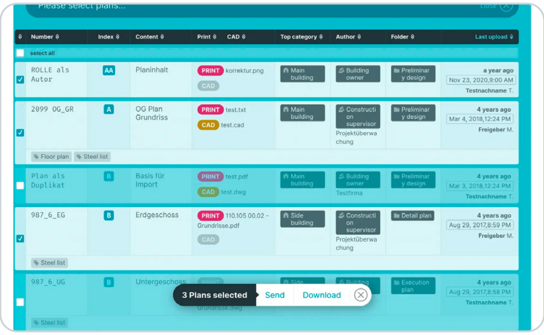


- Click on ***Download*** (blue button above list on the right)
- Filter by Role/Creator, Plan or Document folder, Tags (or enter in search field)
- Select plans or documents by checkbox (select all by top checkbox)
- Click on the ***Download*** button (at the bottom)
- Select folder structure (recommendation: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

Register Plans or Documents



- Click on ***Send*** (blue button on the right above the list)
- Filter by Roles/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 (bottom center)
- Click on ***+ Add documents/plans***, select as described above and ***Add to mailing***
- Optional for plans "Restrict access to PRINT-FILES"
- Click on ***+ Select recipients***, select participants using checkboxes, add further recipients if necessary (click on ***+ Add recipient***, enter details and click on ***add****)* and confirm by clicking on ***select***
- Activate additional shipping options if required:
    - "Always send a copy to me too"
    - "Show recipients list in email" (all recipients (Cc) appear in the e-mail)
- Enter ***subject*** and ***message***
- Click on ***Send***

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

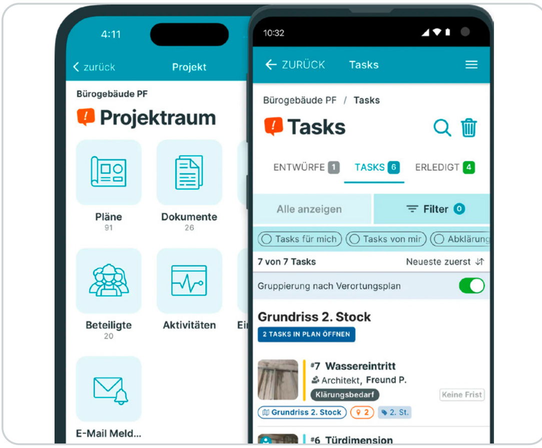
HINT
Save message as personal template: Select parts or all of the text, click on ***+ Create***, enter the name of the text snippet and ***Save***.

Basic Functions

Tasks

B11 **Tasks in general**

PLANFRED Tasks is used in defect management, to distribute tasks or to clarify open questions. All activities and the entire message history are fully documented.



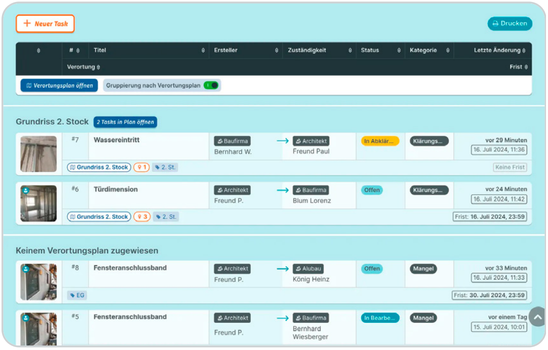
1.a) Visibility of tasks

Published tasks are visible to **the assignee** and **all participants with the same role**. Administrators see all tasks.

Draft tasks are only visible to the respective creator.

1.b) Editing tasks

Every participant who sees a task can also edit it. For example, if a task has been assigned to a participant with the role of “painter”, any other “painter” can make annotations, hold consultation or mark the task as completed.



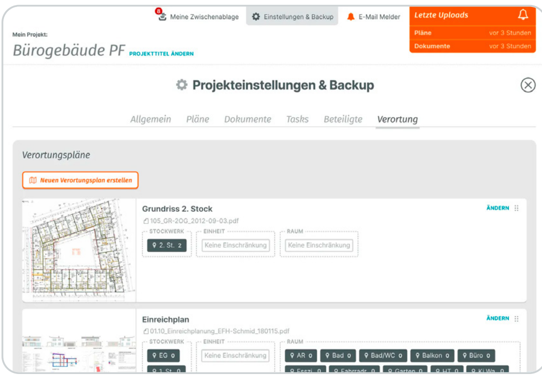
2.) Smartphone app and desktop version (browser)

New tasks can be created both on the smartphone and with the desktop version in any browser.

The following functions are available in the smartphone app without an internet connection

- Save task as draft
- Filter and open tasks

The smartphone app is available for Android (Download from Google Play Store) and iOS (Download in App Store). After installation, you can log in as in the desktop version by entering your PLANFRED access data.



3.) Individual project settings for tasks and location

Settings & Backup (under “Project” in the respective project)

Tasks tab

- **TASK CATEGORIES and TAGS: rename, remove** (click on x) and **add** (write the name in the input field and click on ‘+’). The list of task categories can be organised as desired (click on the dot symbol and move), tags are sorted alphabetically.

Locations tab

Add location plan:

- Click on ***Create location plan***
- Upload plan (PDF, JPG, JPEG, PNG, WEBP) from local file system or clipboard
- Enter title
- Deactivate "Can be selected on editing location" if necessary
- Select task location categories
- ***save***

Location tags:

Each of the 4 location categories can be renamed and activated/deactivated. The order can be changed by clicking on <x>.

The terms within an activated category can be defined individually. When creating new tasks, only activated categories are available for selection.

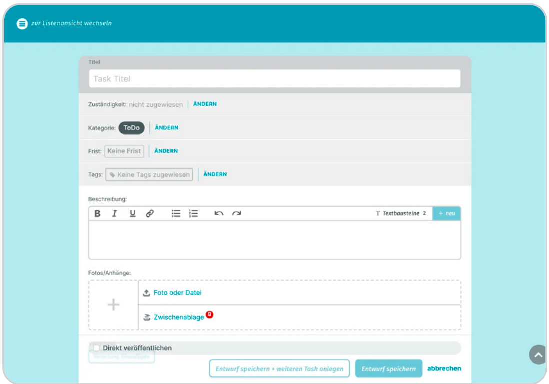
B12 **Create new task**

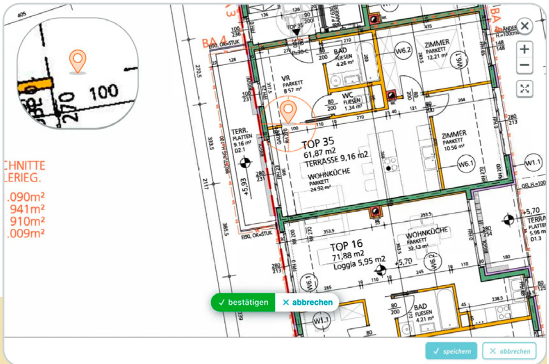
Tasks tab

- Click on ***+ New task***
- Enter task title
- Define ***Assignee, Category, Due date*** and ***Tags***
- Add description
- Upload attachments:
  - **Smartphone app:** Take photos directly and start image editing if necessary (mark, comment, crop, ...) and/or upload file
  - **Browser version:** Upload files from local file system or clipboard, edit photos if necessary
- **Add location:**
  - Select ***location plan*** (new plans can be added in the browser version: under "Project" click on "Settings & Backup")
  - Click on ***+ New pin***, set pin, ***confirm***, set additional pin or change pin if necessary, select location categories and ***save***
- Now ***Publish immediately*** or ***Save draft***

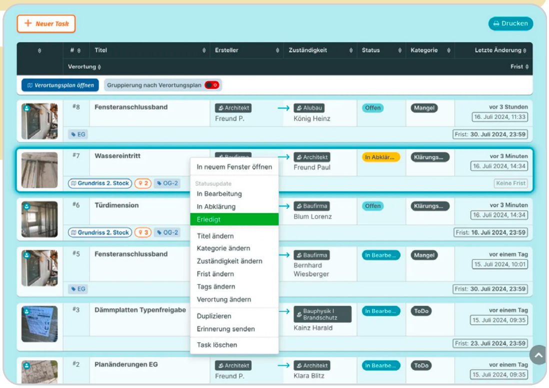
After publication, changes can be made by any participant with the role of creator and all project administrators.

If, for example, a defect is relevant for several trades, the task in question can be duplicated and thus assigned to another responsible person.





HINT
Various editing options can be selected in the right-click menu (right-click on a task in the list) to make changes quickly.

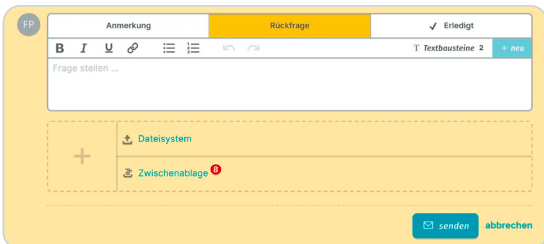


HINT
The dictation function of the smartphone can also be used to enter text (e.g. description of a task).

B13 **Task status**

Each task is marked in colour depending on its status: **New Task** (light blue), **Task in Progress** (dark blue), **Task in Clarification** (yellow) or **Completed** (green).
A status change can be made by any participant who sees the task.

- After publication, a task automatically has the status 'New Task'.
- As soon as an exchange of messages and/or files takes place via the chat function, the status and thus the colour marking changes: for annotations to 'Task In progress' and for consultation to 'Task In clarification'.
- Once an issue has been resolved or an open task has been completed, the status of the respective task is changed to 'Completed'. Photos or comments can be added.



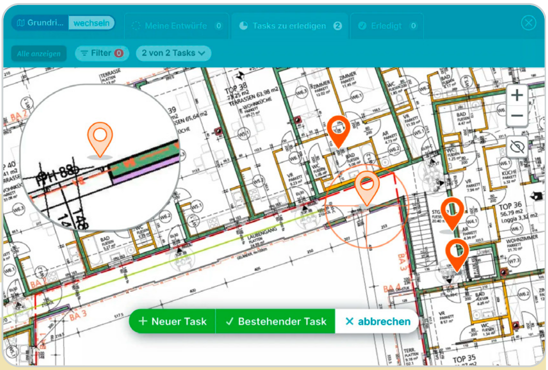
B14 **Task location on plan**

During task location, one or more pins are pinned to a previously uploaded plan in order to be able to clearly localise the task.

If, for example, a defect occurs at several locations on the same location plan, several pins can also be assigned to the corresponding task.

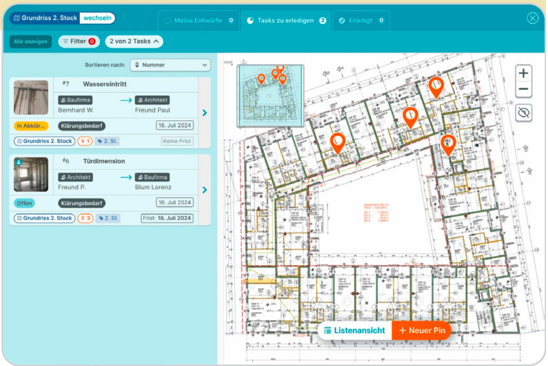
1.) Place new pins directly on the location plan

- Click on ***Open location plan*** (on the left above the task list) and select the desired plan or click on ***X Tasks open in plan*** (if group by location plan is active)
- Click on ***+ New pin*** and position pin on plan
- Then either ***+ New task*** or assign the set pin to an ***Existing task***



HINT
A new pin can also be set by 'long pressing' on the screen.

HINT
It is possible to add or change pins at any time: In the browser version, for example, right-click on the relevant task in the list view and select 'Edit location' from the menu.



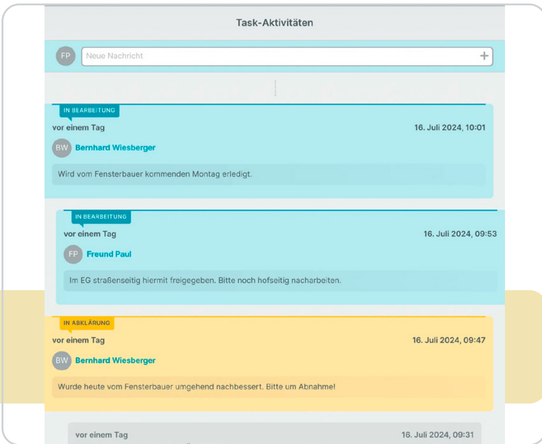
2.) All tasks and pins of a location plan at a glance

- Activate ***Group by location plan*** (above the task list)
- Click on ***X Tasks open in plan*** or ***Open location plan*** (in App: map icon on top) and select plan
- Click on a pin to display the corresponding task. Click on the arrow symbol to open a window with the task details where, for example, changes can be made.
- Clicking on ***X of Y tasks*** (top left) lists all tasks in the location plan. This list display can be specified by setting filters.
- The pins can be shown or hidden by clicking on the eye symbol (top right)

B15 **Task chat**

The integrated chat function enables direct communication between the task creator and the assignee. For example, questions can be asked, comments made or messages added to completed tasks:

- Click in the ***New message*** field
- Select ***Annotation***, ***Consultation*** or ***Completed***
- Compose message (save as text module if necessary)
- Add a photo and/or other files
- Click on ***send***



HINT
Messages for a task can be sent by any participant who has the same role as the person responsible.

B16 **Task notifications**

Notifications about the publication of new tasks, changes, queries, etc. are sent hourly by e-mail **to the assignee and the creator of the task**. The prerequisite for this is that the corresponding Email notifier (Report - Tasks) is activated in the project.

Push notifications are also displayed on the smartphone if the app settings allow this.

Further notifications for tasks (e.g. reminder on due dates) can be switched on or off individually for each project in the Email notifier.

HINT
A task reminder can be sent as an email to the person responsible at any time: In the smartphone app, click on the three-dot menu (to the right of the title), select ***Send reminder***, customise subject if necessary, compose message and ***Send***

B17 **Filter, group and print task list**

1.) Filtering the task list

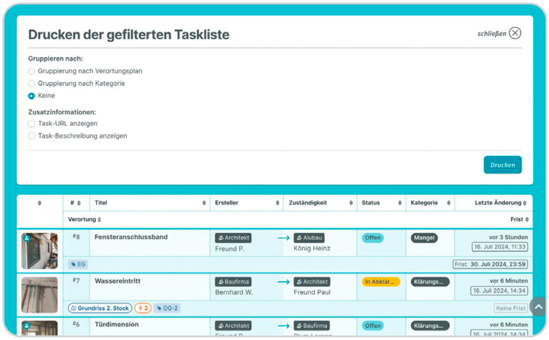
There are three types of tasks that can be found in different tabs: **My Drafts, All Open Tasks** and **Completed**

All tasks in a tab are clearly displayed in a list and can be sorted and filtered according to requirements.

The number of hits in the list view can be narrowed down by filtering according to different properties (Category, Assignee, etc.) and/or by entering search terms.

To remove all previously activated filters, click on the ***Show all*** button.

If tasks are open in the location plan, the list view can also be filtered here as required.



HINT
Quick filter in the smartphone app: My Tasks, Tasks from me and Clarification

2.) Grouping the task list

With ***Group by location plan*** (above the list), the tasks are grouped according to the associated plans. This makes it easy to see how many tasks are assigned to a floor, for example.

3.) Print task list

- Click on ***Print*** (on the right above the list in the browser version)
- Filter and/or sort the list
- Make settings for the print options ‘Group by’ and ‘Additional infos’
- Click on ***Print*** and either print on paper or save as PDF in your own system

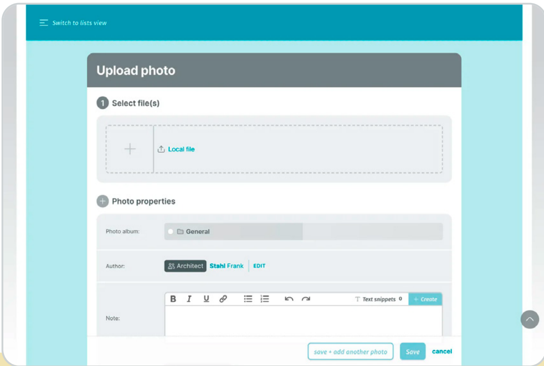
Basic Functions

PhotoLog

B18 **Upload photos**

PhotoLog tab

- Click on ***Upload photo***
- Select file(s) (jpg, png, ...) from ***Local file*** system or drag and drop them
- Select Photo album
- Optionally write a Note
- Optionally assign Tags (filters): Click on „*EDIT*", select or create tag (Enter in field "*New tag*" and click on **+**) and „*save*"
- Optionally add location: Select location plan, set "*+ New pin*" and confirm, select Location tags and "*save*"
- Click on ***Save x photos***

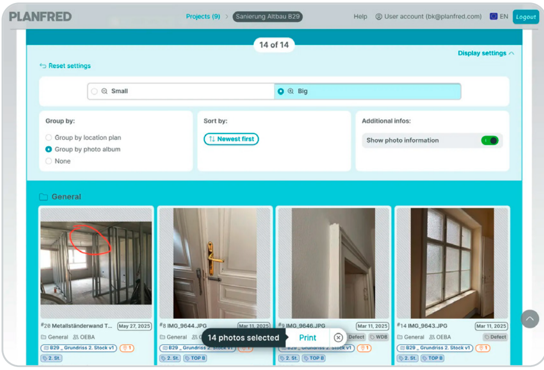


HINT
Edit several photos at once: Filter photos e.g. by Capture date, click on ***Edit*** (right above the photo display), select photos, click on ***Edit*** (bottom center), click on e.g. *„Tags"* in the selection menu, change Tags and click on ***Update x photos***.

Photos can also be taken **offline** in the **smartphone app**. As soon as an internet connection is re-established, the photos are automatically synchronized with the desktop version in the browser.

B19 **Print photos**

- Filter photos according to the required criteria (Photo albums, Tags, ...)
- Unfold the Display settings and select "Small" or "Big"
- Select grouping and sorting and display additional information if required
- Click on ***Print*** (on the right above the photo display)
- Click on ***Print*** (bottom center) and either print on paper or save as PDF in your own system



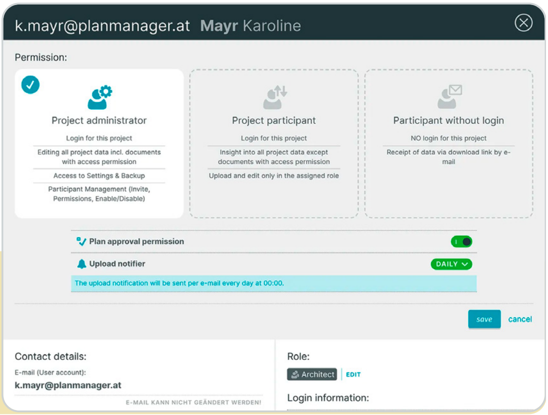
Special Functions

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" (under "Project") 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 review plans

As soon as there is at least one participant with permission to review 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 review 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.

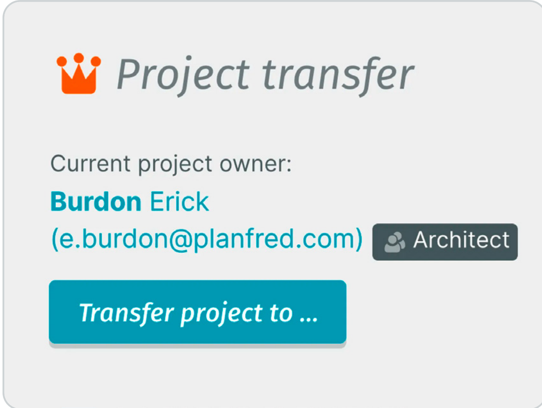
Delete participant or revoke access to the project

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

A project owner can transfer ownership of their project to a participant at any time. All project data will remain intact. Only the original owner will become a participant with administrator rights and can also be deleted if necessary.

A project can only be transferred to a participant if they have a plan selected within their user account. As soon as a user account is no longer a project owner, the payment obligation expires and the plan selection can be changed to “FREE.”



Change email address of designated project owner:

1. Invite the new owner address to each project to be transferred (regardless of whether they are an administrator or not).
2. Log in with the new owner address. Select the plan in your user account and enter the billing address. In the “Additional information on accounting” field, enter: “No new order - project owner is being changed.”

   → Logout
3. Log in to each of your own projects as the owner and transfer them: Under ***Project*** (top right), click on ***Settings & Backup*** (bottom left), then click on ***Project transfer*** and ***Transfer project to***, select a new owner, and ***Start transfer***

   → Logout
4. Log in with the new owner address and take over the projects—this completes the project transfers.

   → Logout
5. Finally, log in again with the original owner's address and change the plan selection in the user account to: ***FREE***

ATTENTION: When following the steps above, always make sure that you are logged in with the correct email address.

HINT: Even if two plans are ordered at short notice, only one plan will be charged.

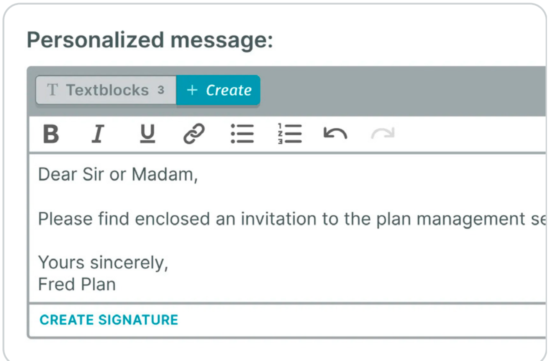
Transfer your own projects to the assigned office address to end the test phase:

Each PLANFRED user account can create its own projects, thereby starting the 30-day trial period. With project transfer, your own projects can be transferred to the commissioned office account, and the test phase then expires automatically.

1. Invite the assigned office address to each of your own projects and transfer it: Under ***Project*** (top right), click on ***Settings & Backup*** (bottom left), then click on ***Project transfer*** and ***Transfer project to***, select a new owner, and ***Start transfer***
2. Once the new owner has accepted the project transfer, the original owner becomes a project administrator.

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.

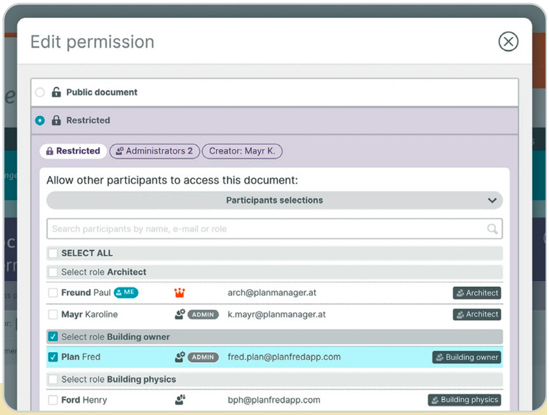
- when creating a new project, click on ***Apply project settings from another project***
- select the desired project from the list
- changes to the project settings can be made at any time at a later date

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

Special Functions
Plans & Documents

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***

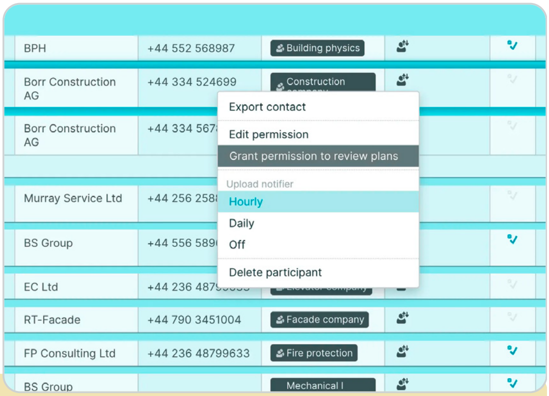
By right-clicking on a document and selecting ***Edit permission***, access can be subsequently restricted or edited.

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).



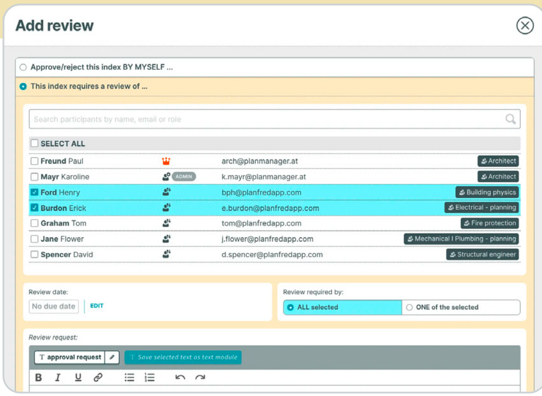
ATTENTION: A plan should only be approved and coloured green if all comments from the previous plan review have already been incorporated. It should also be recognisable from the index that the plan has been approved (no preliminary draft).

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

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

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

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



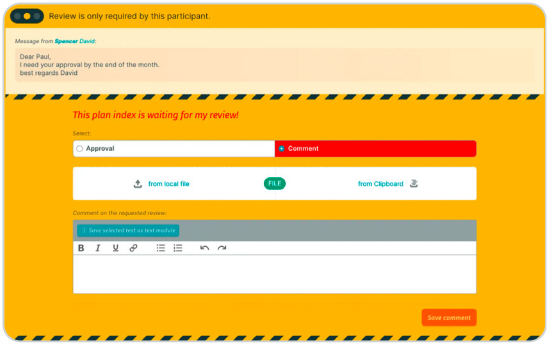
2.) Request review

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

- selection at the bottom ***Review required 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.

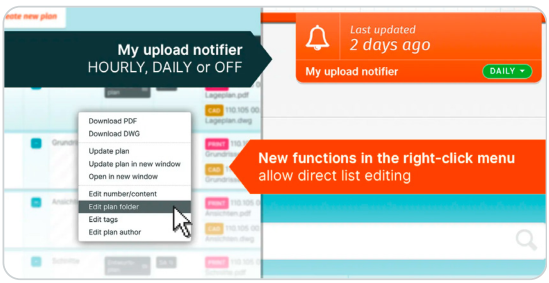
4.) The plan author incorporates the comments and updates the plan

- 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.

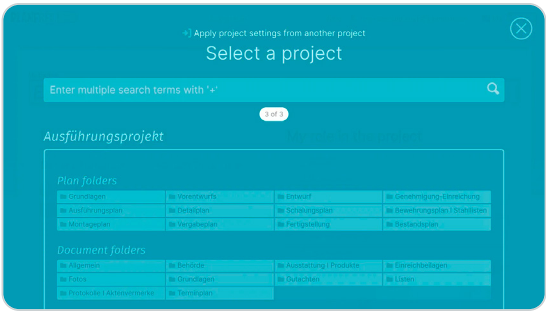


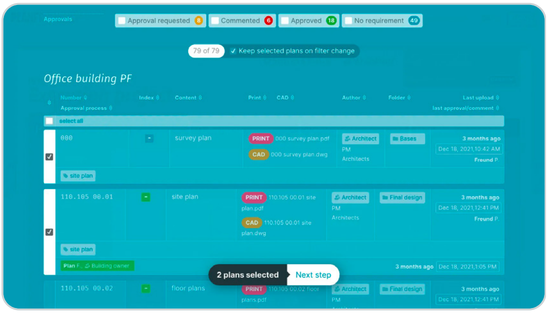
Procedure:

- 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, status 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*** (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.

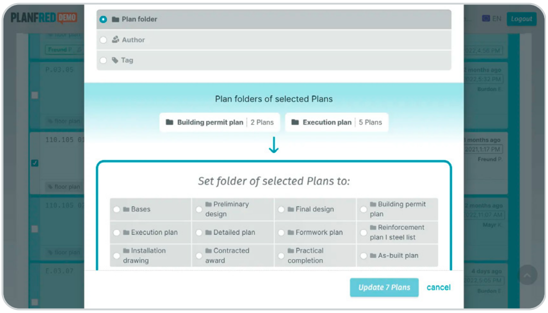
Procedure:

- 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

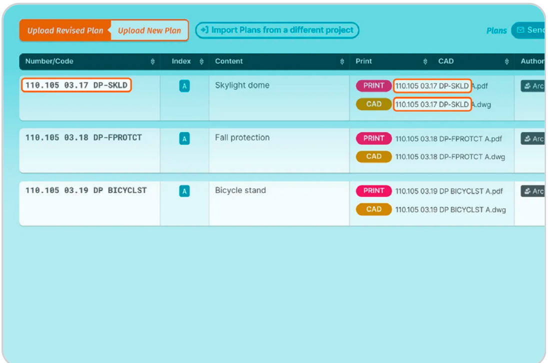
Several execution plans are to be moved to the installation drawings folder:

- 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 ***Automatic plan update***.

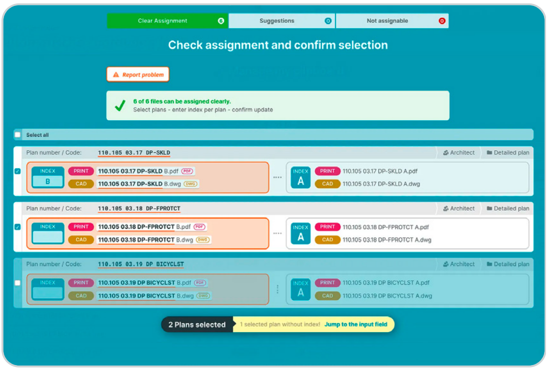
The assignment works optimally if the plan files are always labelled the same, namely **the fixed part at the front – the plan number/code** and the variable part at the end – the index (and, if applicable, status/date - max. 6 characters).



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

- **110.105 03.17 DP-SKLD** A.pdf *(file name)*
  110.105 03.17 DP-SKLD *(associated plan number)*
- **Arch_Lp5_GR_EG_**01.dwg *(file name)*
  Arch_Lp5_GR_EG_ *(associated plan number)*

For plans that have already been uploaded (see "Plans" tab), the "Number/Code" field must not contain index, status 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 for automatic plan update:

- Click on ***My clipboard*** (top center)
- Drag and drop plan files to the clipboard or click on ***Select files***
- Click on ***Automatic plan update ...***
- 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
- Add a note if necessary
- 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, status or date - the field must be edited: Right-click on plan, select ***Edit number/content***, delete index, status 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 ***Review required 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.

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