



# *Planfred manual*

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Organise your project in just a few steps OW-EN v21-01

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## Registration/login

Your Planfred user account is created during registration. If your e-mail address already possesses a Planfred login by way of a project invitation, then registration is no longer necessary.

Register at: [app.planfred.com/registration](https://app.planfred.com/registration)

Click **Create password now** in the confirmation e-mail and enter your desired password in the next step.

You may now log in with your e-mail address and your password at any time at: [app.planfred.com](https://app.planfred.com)

Use your Planfred access data to access all **Projects** your own projects, as well as the ones that you have been invited to. In **Projects** (in top-centre), you may switch between the respective projects

**TIP:** The password may be reset again at any time when logging in. Change the password in the user account (top right).

### My projects

+ Create new project

## Create project/plan selection

Each Planfred user (no matter whether you register yourself or receive an invite) is entitled to add their own projects, which starts the test phase.

### Project list (above in projects)

- Click **Create your first project**
- Enter project title
- Select your own role in the project, or, if it's not available, enter it in the "New role" field and click +
- Click **Create project**

After 30 days, the user account of a project owner will become fee-based. Billing via e-mail does not take place automatically, however, but rather only after online ordering in the user account (package selection and billing address entry).

**RECOMMENDATION:** For the fee-based user account of the project owner, we recommend using an impersonal e-mail address. All projects should be created using this login. This provides one central account access to all company projects, and it is also the owner of all the data. The project managers are added in the respective project as administrators and therefore receive all permissions for project organisation.

**TIP:** The **Project transfer** function (in "Settings & backup") enables you to transfer your project to the ownership of a participant (provided they have selected a package). If you no longer possess a project of your own, then you are no longer in the test phase.

# Roles, Plan folders, and tags – individual project settings

When project participants upload plans or documents, they are automatically filed under their roles. Top categories (optional), plan folders and tags are selected when plans or documents are created and can be changed at any time afterwards. A participant can only update or edit data of his own role - on plans or documents of other roles he has read-only rights. The project owner and the project administrators have editing rights for all roles.

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

## Settings & Backup (top right)

### Customize Plan and Document folders

- **rename** and **save** folder
- Delete folder by clicking **x** (right)
- Add folder: Write name in “New plan folder” or “New document folder” field and click on **+**
- Change order: Click on list symbol (right) and move to the desired position

### 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

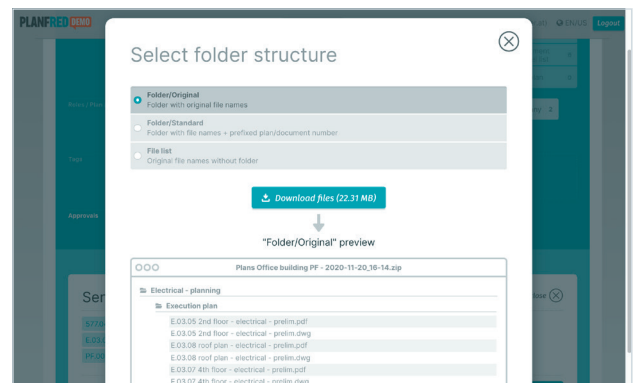
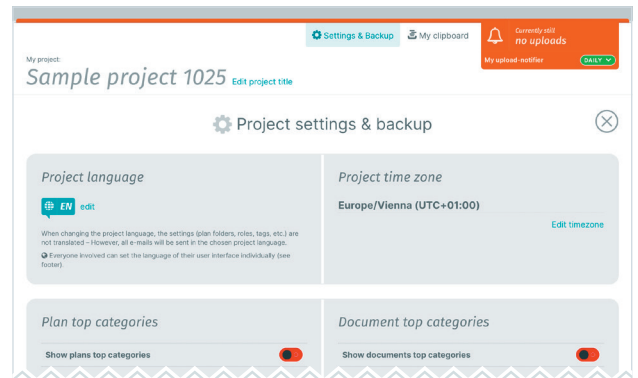
### Add plan and document top categories optionally

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 plans and documents that have already been created are automatically assigned to the “Standard” top category by Planfred and can be assigned to a different top category directly in the list view: Right-click on the relevant plan, select **Change top category** in the pop-up window, adjust settings and **save**.

**TIP:** All project settings can be transferred to other projects: Simply **Create new project** and **Apply project settings from another project**.



## Roles and Plan folders - folder structure for downloading

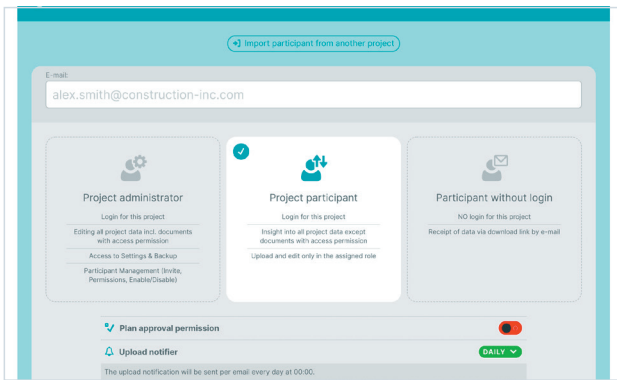
When downloading all plans, roles form the top folders and plan folders form the subfolders. If the top categories are activated, they are displayed as the top folder category of the project. Thus, when creating plan folders, it is important to consider which plans are to be stored in a folder when downloading. The same applies to document folders.

## Tags - additional filters

By adding tags, you can group plans or documents according to individual criteria and thus filter them: For example, the plan “Ground plan 2-fl” is provided with the tags “Ground plan” and “2-fl”. If, for example, you need the ground plans of the architect’s execution plans, first activate the filter of the role “Architect”, then the filter “Execution plans” and finally the tag “Ground plan” (or enter in the search field: “architect + execution + ground”). It is advisable to define tags in advance so that the participants can select them when creating the plan.

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

Create new participant



## Invite participants to project / permissions

Participants do not need to register and may use Planfred free of charge! Planfred sends invitation e-mails when participants are added. Participants also receives a link to the instructions: [www.planfred.com/hilfe](http://www.planfred.com/hilfe)

### Participants tab

- Click **Create new participant**
- Enter e-mail address
- Select permission: **Project participant**, **Project administrator** or **Participant without login**
- Optional plan approval permission
- Upload notifier recommendation **daily** (each participant can switch off their upload notifiers themselves)
- Select the role or enter into the "New role" field and click +
- Enter last name, company, and telephone number (optional)
- Optional personal message
- **Invite + add another one**

**TIP:** Participants that are already added can be imported to additional projects (**Add new participants** and **Import participant from another project**)

**TIP:** By right clicking on a participant in the list, the following functions are available: **Delete participant**, **Grant or revoke plan approval permission**, Upload notifier (**hourly**, **daily**, **OFF**), **Export contact**.

**TIP:** In the participants detail view (click on participants) in **Edit permission** (top-right), a project participant may be made the project administrator retroactively or removed from project access, etc.

## Project participant

Project participants can only use their Planfred access data to log into projects that they have been invited to. The project login enables participants to download all project data and upload their plans and documents, and these are stored automatically under the assigned role. Each participant may only update or edit their own role. Plans and documents of other roles are only available to a participant with reading permission. In case of a team of multiple structural engineers, it is important that they are assigned the same role during project invitation.

## Project administrator

Project administrators generally have the same permissions in the project as the project owners (nevertheless, they cannot delete the project or revoke project access from the owner). An administrator is entitled to invite other participants, to delete them, and to change participants. Furthermore, an administrator has access to "Settings & backup" and to all documents in the document vault. An administrator is allowed to edit or update all plans and documents of other roles and may also update data for other roles representatively by changing the author (this enables the plans and documents to be stored under the role of the author instead of their own role).

## Participant without login

Participants without a login do not have access to the project and are only available as a recipient for manual delivery of plans and document via the download link via e-mail. In the participants detailed view, receipt can be checked (click on participants – see under activities, e.g. "Download"). Project invitation e-mails and upload alerts cannot be sent to participants without a login. Participant without a login can, however, be managed as authors, e.g. a surveyor's plan under the "Surveyor" role.

**RECOMMENDATION:** We recommend sending bid request packages to participants without a login (Zip files) in a separate project (award package)! (Advantages: Recipients and technical planners cannot see bidders and sensitive data like offer evaluations, agreements, etc. can be managed without access permission). Plotting orders are processed by manually sending plans to participants without a login, in which case the order data are entered via text message.

## Plan approval permission

As soon as at least one participant with plan approval permission is available in the project, the approval system for plans is activated. Next, when uploading a plan, select whether approval is required for this plan. If this plan should be approved, those who can approve it may be selected from a list of all participants with plan approval permission.

A participant will be informed automatically by e-mail, if a plan is waiting for their approval. The participants may now be approve or correct. Correction via text and/or attachment. The plan author is informed automatically via e-mail about corrections/approvals.

The approval system is always active for documents, and an approval may always be requested by any participant.

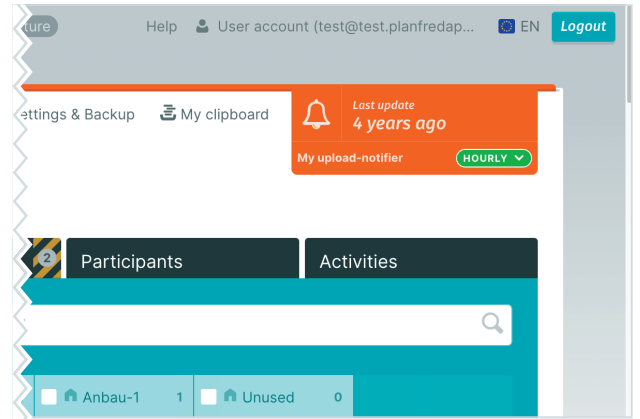
## Delete participants or revoke access to the project

If a participant is deleted or project access is revoked from a participant (in the participants detailed view **Edit permission to Participant without login**), then all download links in the e-mails are deactivated. Deleted participants and participants without login no longer have access to the project. Deleted participants are moved into the recycle bin (activities are still accessible in the recycle bin. They can be restored at any time).

## Upload notifier

In case new plans and documents are uploaded, Planfred automatically sends messages, provided upload notifier is activated for the project.

A project participant can turn their upload alerts on or off themselves in the respective project (orange field in top-right). If **daily** is selected, Planfred will send a group e-mail at midnight including all new uploads over the last 24 hours.



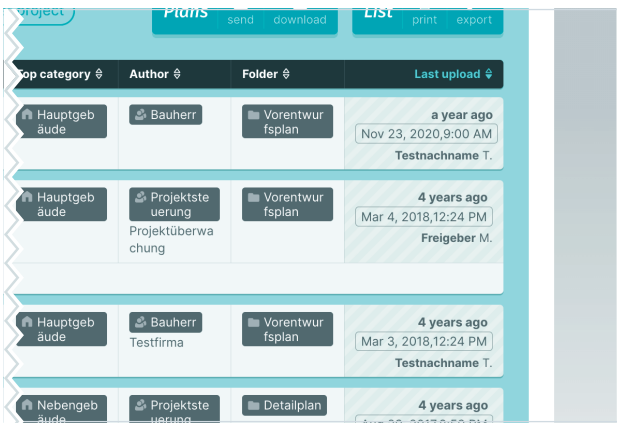
## Sort plans or documents according to most recent upload

Sorting the list view according to the most recent upload provides the best overview of new uploads in the project.

### Plans or documents tabs

- Activate filter **Display all** (top-left)
- Click **Last upload** (on right in the list header)
- Filter according to "Role/author" and "Plan or document folder"
- Preview by right clicking on a plan or document and select **Open PDF**
- Download multiple plans by clicking **Download plans** or **Download documents** (blue button to the right above the list)

**TIP:** The list may be sorted according to all criteria in the black list header bar.



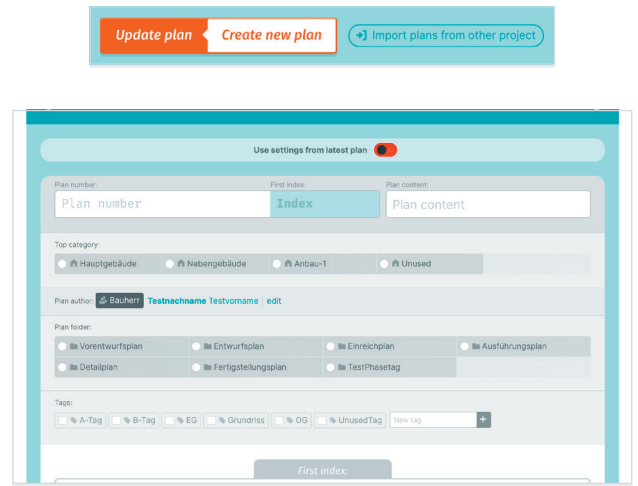
## Create a new plan – upload plan for first time

**ATTENTION:** Each plan is only added once and is then updated. Plans may not be added multiple times, which means the most recent version remains clear! Reworked indexes can be accessed in the plans detailed view (click the plan).

### Plans tab

- Click **Create new plan**
- Select a print file (pdf, etc.) from the file system or clipboard
- Select a CAD file (dwg, etc.) from the file system or clipboard
- The file name is added automatically to the plan number field
- Edit plan number: Remove the index and date and enter this into the “Index” field (the number remains unchanged in case of updates)
- Enter the description into the “Plan content” field (searching utilises terms)
- Select a plan folder
- Select optional tags or create tag (enter into “New tag” field and click +)
- Write optional comment
- Request optional approval
- Click **Save + add another one**

**TIP:** All file formats may be uploaded, including Zip packages (e.g. As-built plans). Planfred does not specify plan encoding. Each participant can add plans with their own encoding system.



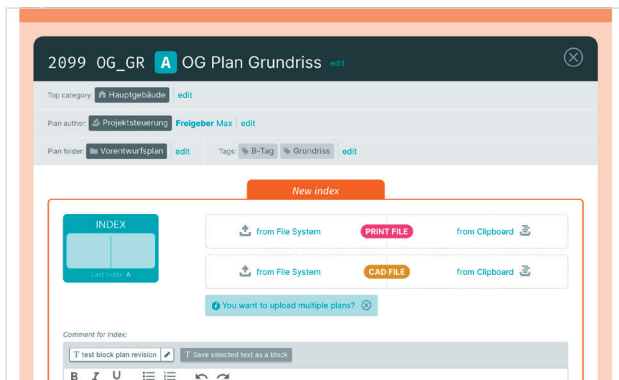
## Update plan – the plan was already created

**ATTENTION:** A previously uploaded plan needs to be updated! Reworked indexes can be accessed in the plans detailed view (click the respective plan).

### Plans tab

- Click **Update plan**
- Select the plan to be updated
- Select a print file (pdf, etc.) from the file system or clipboard
- Select a CAD file (dwg, ...) from the file system or clipboard
- Enter index
- Write optional comment
- Request optional approval
- Click **Save index and return to list**
- Select the next document to be updated ...

**TIP:** right click with the mouse to open and update a plan in a new window (tab). You can open any number of windows (tabs) parallel to each other.



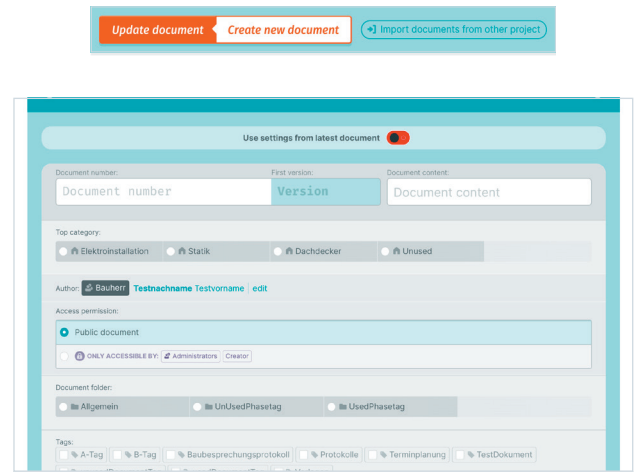
## Create a new document – upload a document for the first time

**ATTENTION:** Each document is only added once and is then updated. Documents may not be added multiple times, which means the most recent version remains clear! Reworked versions can be accessed in the documents detailed view (click the document).

### Documents tab

- Click **Create new document**
- Select a file from the file system or clipboard
- The file name is added automatically to the document number field
- Edit document number: Remove the version and enter this into the "Version" field (the number remains unchanged in case of updates)
- Enter the description into the "Document content" field (searching utilises terms)
- Limit optional access **ONLY ACCESSIBLE BY**
- Select document folder
- Select optional tags or create tag (enter into "New tag" field and click +)
- Write optional comment
- Request optional approval
- Click **Save + add another one**

**TIP:** All file formats may be uploaded, including Zip packages (e.g. photos). Planfred does not specify document encoding. Each participant can add documents with their own encoding system.



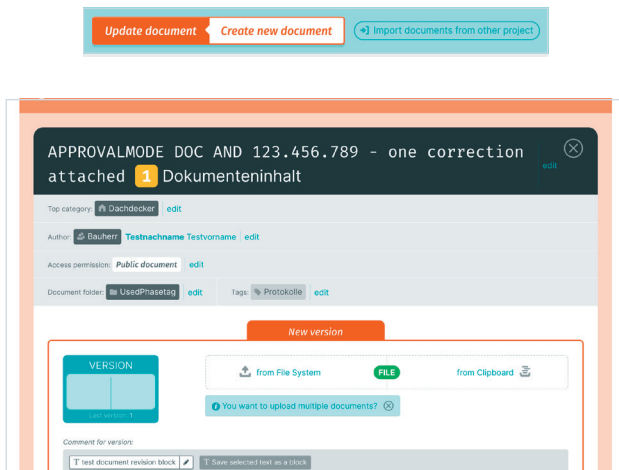
## Update document – the document was already created

**ATTENTION:** A previously uploaded document needs to be updated! Reworked versions can be accessed in the documents detailed view (click the respective document).

### Documents tab

- Click **Update document**
- Select the document to be updated
- Select a file from the file system or clipboard
- Enter the version (or date e.g. "200930")
- Write optional comment
- Request optional approval
- Click **Save version and return to list**
- select the next document to be updated ...

**TIP:** right click with the mouse to open and update a document in a new window (tab). You can open any number of windows (tabs) parallel to each other.





## Create multiple plans or documents - using the clipboard and settings from the latest plan

Planfred offers two features that greatly facilitate the creation (initial upload) of multiple plans. The use of the clipboard ensures that no plans are overlooked and the ability to copy settings from the last plan saves time. Also, when updating plans and uploading documents, it 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 right)
- load all CAD and/or print files of the new plans 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 cross in the upper right corner), the files will be uploaded in the background

### After that, the first plan is created and fed with the corresponding files from the clipboard:

- click on **Create 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.; write comment and/or request approval if necessary
- click on **save + add another one**

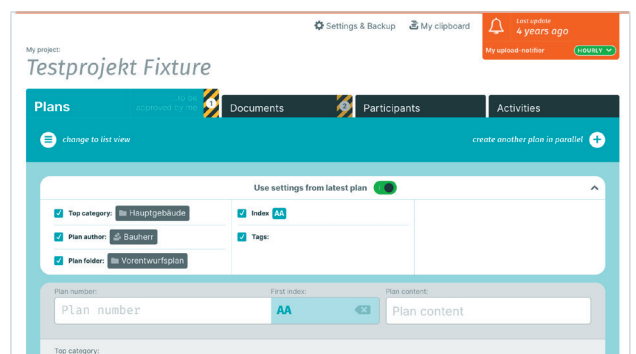
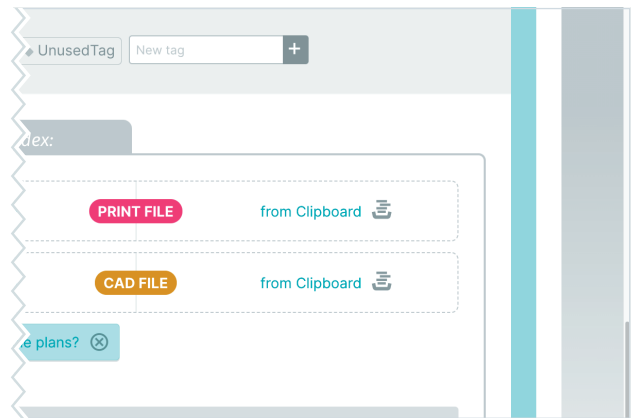
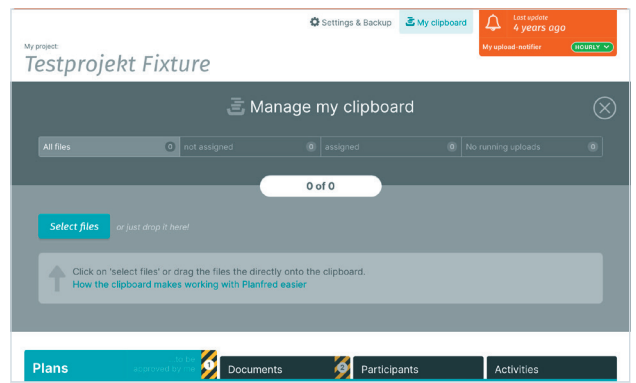
### When creating further plans, the settings of the respective last plan can be taken over:

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

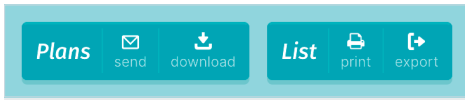
This process is repeated until there are no more plans to choose from in the clipboard pop-up window – so the list is cleared. Clicking on **My clipboard** (to the right of "Settings & Backup") shows that all files in the clipboard have the status "assigned".

**PLEASE NOTE:** 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!

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





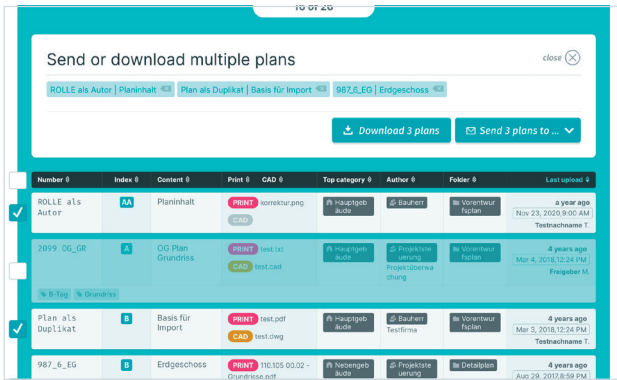


## Download multiple plans or documents

### Plans or documents tab

- Click **Download plans** or **Download documents** (blue button on right above list)
- Filter by role/author, plan or document folder, tags (or entry into the search field)
- Select the plans or documents using the check box (select all using the top check box)
- Click **Download plans** or **Download documents**
- Select folder structure (recommendation: **Folder/Original**)
- Click **Download files**

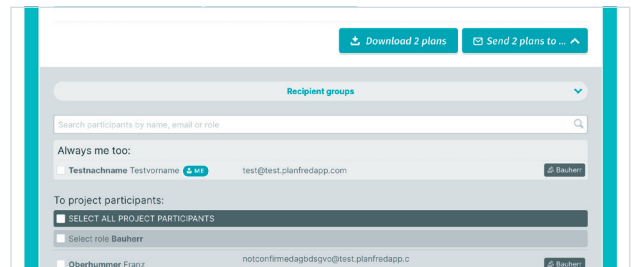
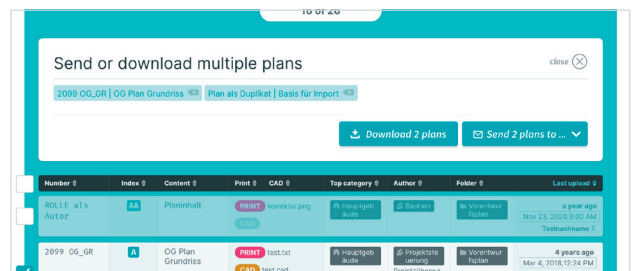
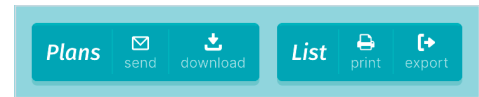
**TIP:** Plans and documents may be sorted according to all criteria in the black list header bar.



## Send multiple plans or documents

### Plans or documents tabs

- Click **Send plans** or **Send documents** (blue button to the right above the list)
- Filter by role/author, plan or document folder, tags (or entry into the search field)
- Select the plans or documents using the check box (select all using the top check box)
- Click **Send plans to** or **Send documents to**
- Select the recipient
- Add optional additional recipients (enter e-mail address and click +)
- Save optional recipient selection as a group (enter name and click +)
- Write message
- Create optional signature template
- Optional for plans "Send print files only"
- Click **send**



If you have any questions, I am personally available to you.



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