



Planfred manual

Quick instructions for participants PA-EN v22-01

Create password/login	2
Sort plans or documents according to most recent upload	2
Upload notifier	2
Create a new plan – upload plan for the first time	3
Update plan – the plan was already created	3
Create a new document – upload a document for the first time	4
Update document – the document was already created	4
Create multiple plans or documents - using the clipboard and settings from the latest plan	5
Send multiple plans or documents	6
Download multiple plans or documents	6

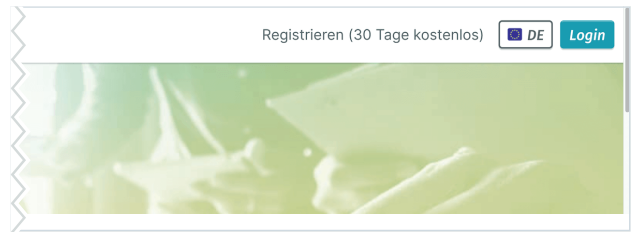
Create password/login

Your free Planfred user account was created with the first project invitation. You don't need to register again! Click **Create password now** in the invitation e-mail and enter your desired password in the next step.

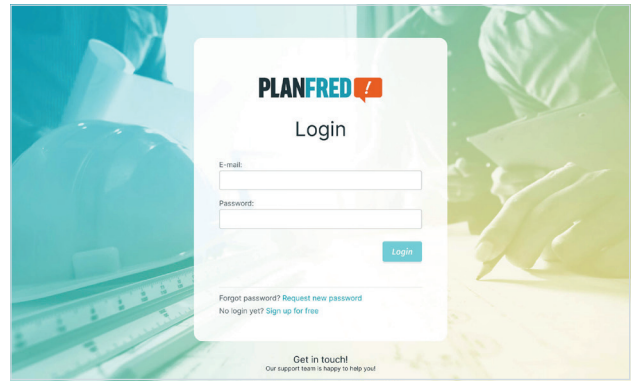
You may now log in with your e-mail address and your password at any time at: **app.planfred.com**

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

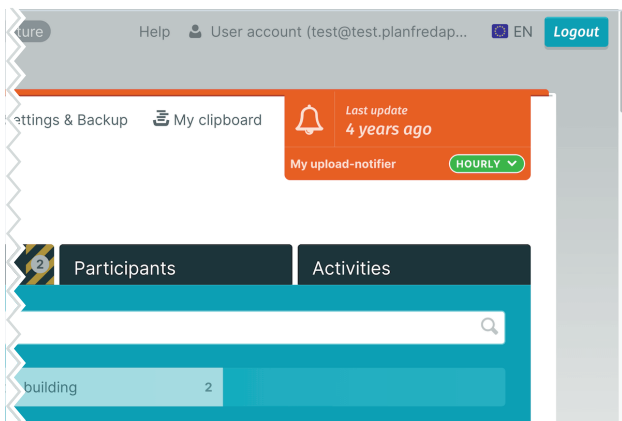
TIP: The password may be reset again at any time when logging in. Change the password in the user account (top right).



Login-Button auf www.planfred.com rechts oben



Login-Seite app.planfred.com



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.

Top category	Author	Folder	Last upload
Main building	Building owner	Preliminary design	a year ago Nov 23, 2020, 9:00 AM Testnachname T.
Main building	Construction supervisor Projektüberwachung	Preliminary design	4 years ago Mar 4, 2018, 12:24 PM Freigeber M.
Main building	Building owner Testfirma	Preliminary design	4 years ago Mar 3, 2018, 12:24 PM Testnachname T.
Side	Construction	Detail plan	4 years ago

Create a new plan – upload plan for the first time

**** 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").

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/code: 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**

NOTE: 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.



TIP: Plan numbers, plan authors, plan folders, etc. can be changed subsequently: Right-click on plan in list view, select the desired option in the pop-up window, make the change and **save**.

TIP: 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 very bottom, activate the plan property to be changed, select the desired plan folder and click on **Update x Plans**



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.

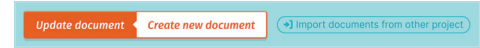
Create a new document – upload a document for the first time

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 on the document, then under "Version history").

Documents tab

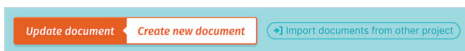
- Click **Create new document**
- Select a file from the file system or clipboard
- The file name is added automatically to the document number field
- Edit document number: Remove the version and enter this into the "Version" field (the number remains unchanged in case of updates)
- Enter the description 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**

NOTE: 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.



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

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



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**

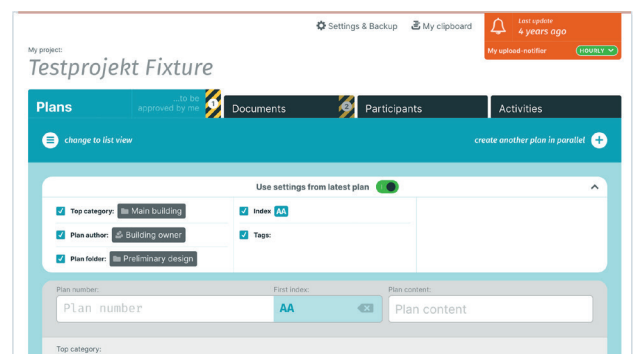
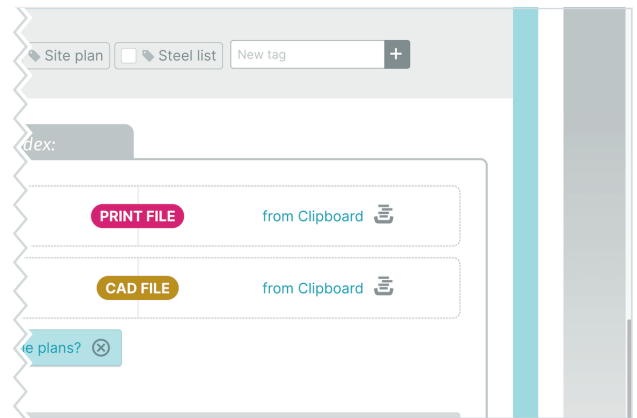
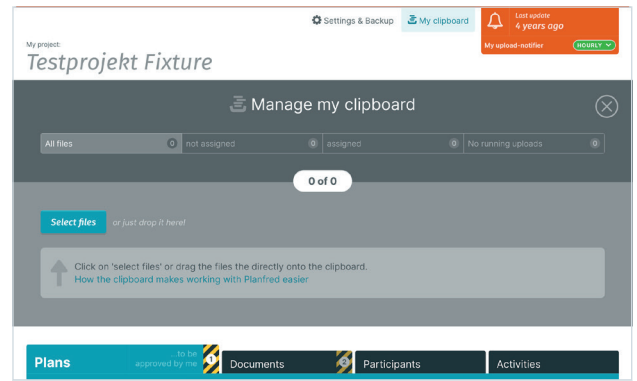
When creating further plans, the settings of the respective last plan can be taken over:

- 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** (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** (at the bottom)
- 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. Preview by right-clicking on a plan or document and selecting **Open PDF**

Please select plan(s):

Number	Index	Content	Print	CAD	Top category	Author	Folder	Last upload
ROLLE als Autor	AA	Planinhalt			Plan building	Building owner	Preparation design	Nov 23, 2020, 9:00 AM Testnachname T.
2099_OG_GR	A	OG Plan Grundriss			Plan building	Construction supervisor	Preparation design	Mar 4, 2018, 12:24 PM Freigebiet M.
Plan als Duplikat	B	Basis für Import			Plan building	Building owner	Preparation design	Mar 3, 2018, 12:24 PM Testnachname T.
987_6_EG	B	Erdgeschoss			Plan building	Construction supervisor	Detail plan	Aug 29, 2017, 8:58 PM Freigebiet M.
987_6_UG	A	Untergeschoss			Plan building	Construction supervisor	Detail plan	Aug 29, 2017, 8:58 PM Testnachname T.

3 Plans selected  Send  Download

Send multiple plans or documents

Plans or documents tabs

- Click **Send** (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 on button **Send** (at the bottom)
- Select the recipients
- Add optional additional recipients: Click on **+ Add recipient**, enter your details and click on **add**
- Write message
- Create optional signature template
- Optional for plans "SEND PRINT FILES ONLY"
- Click **send**

TIPP: Save optional recipient selection as a personal group: Click on **+ Create recipient group**, enter the name and click on **save**

TIPP: Save message as personal template: Select parts or all of the text, click on **Save selected text as a block**, enter the text block name and **Save**



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987_6_EG	B	Erdgeschoss			Plan building	Construction supervisor	Detail plan	Aug 29, 2017, 8:58 PM Freigebiet M.

Recipient groups

Search participants by name, email or role


Always me too:


☐ Testnachname Testvorname  test@test.planfredapp.com 

To project participants:

☐ SELECT ALL PROJECT PARTICIPANTS

☐ Select role Building owner

☐ Oberhammer Franz notconfirmedagbdsgvo@test.planfredapp.com 

☐ Participant Same Role As Creator Approver samerolescreator@test.planfredapp.com 

☐ Select role Building physics



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

DI Martina Schmid
Sales Manager, Support

Phone: +43 1 997 44 70-2
E-mail: support@planfred.com