PlanShare

Local Authority Guide

Contents

Introduction

PlanShare is our brand new online information sharing solution enabling local authorities to share and comment on building control or planning applications with outside consultees and other authorities.

Using PlanShare a Plansharee can simply drag and drop application plans and documents into a folder and then share that folder with any consultee email address entered manually or from an address book of frequently used contacts. The consultee will receive an email notifying them that an application folder has been shared with them and a link will direct them to the PlanShare online in DataSpace Live, the system our local authorities subscribers use to receive, process and approve applications online. If the invited party already has a DataSpace Live account registered under the email address the application folder was shared with, the PlanShare will appear in their DSLive account under a brand new PlanShare section. If they do not already have an account, an account will be automatically created for them when the folder is shared.

Once logged in to DataSpace Live, the consultee can post comments and view, download and upload documents, while our DataSpace Live Document Viewer offers advanced measuring, markup and redlining tools for consultees to assess plans with. Consultees are able to view and respond to comments and documents added by the PlanSharee and other participating consultees, creating a dynamic, shared consultation environment.

PlanShare enables you to have complete control over your shared applications and data. Before sharing a folder the Plansharee can apply settings controlling what a consultee can view, download, upload and comment on, allowing you to protect any confidential information. In addition PlanShare allows you to pick and choose which documents in an application you would like to share and if needed you can unshare the folder, make changes or remove a document then reshare the folder with your consultees. A consultee can be added to or removed from a PlanShare at any time.

With PlanShare situated right alongside your Submit-a-Plan applications in DataSpace Live and with the ability to switch between viewing a PlanShare and its original application at the touch of a button, creating, viewing, managing and navigating a PlanShare is quick, easy and efficient.

PlanShare is simple and easy to use and this guide will teach you how to use all of its tools, but if however you experience any problems or simply have a question you can contact us at
helpdesk@resolutiondm.com 01242 260505

Section A. The 'PlanShare' Tab

To access PlanShare you will need to log in to your DataSpace Live account.
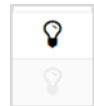
PlanShare has been developed so that it is easy to use and navigate. You will find a **'Planshare'** tab on the main left hand side menu in your account.

Planshare
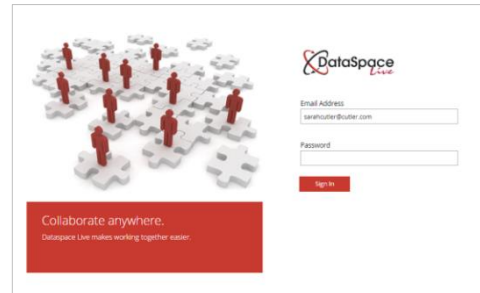
Here under the PlanShare tab you will find two smaller **'Shared with Me' / 'Shared by Me'** tabs under which will be listed all the PlanShares that have been shared with you, and vice versa, any PlanShares that you have shared with other people. You can switch between lists by clicking on the **'Shared with me'** tab title or the **'Shared by me'** tab title.

Shared consultations will have a **'PlanShare Open'** icon in their status column. If a greyed out **'PlanShare Close'** icon is present, either the consultation has ended or has been closed temporarily for the Plansharee to edit it before reopening it.

If after a while you end up with many pages of consultations under these tabs you can use the page navigation tools to move between them.

The double arrows take you to the first and last page respectively, and the single ones will move you a page at a time. You can also type the number of the page you want to go to into the box and press the **'Return/Enter'** key on your keyboard.

The **'Reload'** button will re-load the list of applications. This may need to be done if the list didn't load correctly, or is being updated with new PlanShares.

On the right side of your list of PlanShares you will also find a scroller to scroll up and down.

# Section B: Creating and Sharing a PlanShare

1. Introduction: Creating a PlanShare

To create a PlanShare you will need to have the relevant application open in your DataSpace Live account and the **'Documents'** tab selected.

A PlanShare is shared by creating a folder, dragging and dropping the documents of the application you wish to share into this folder and sharing the folder with any email addresses you desire. You can pick and choose which documents you would like to share so if there is a document in the application you do not wish consultees to see, simply do not drag it into the folder and it will not be visible when the consultee views the PlanShare.

Creating a Folder

To create a folder you will need to select the **'Documents'** tab and click on the **'Add Folder'** button option found beneath the document folders on the left hand side (see image below).
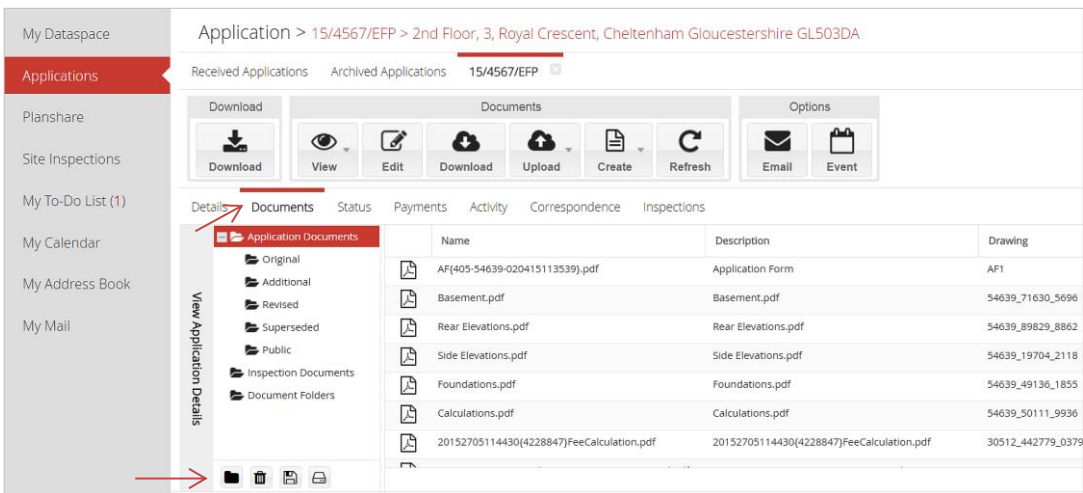
A new **'Create Folder'** window will open asking you to choose a name for your folder which can be anything you like, for eg. 'application documents' or the address of the application. When the consultee receives their PlanShare invite email both the details of the original application and the name of this folder will be included.
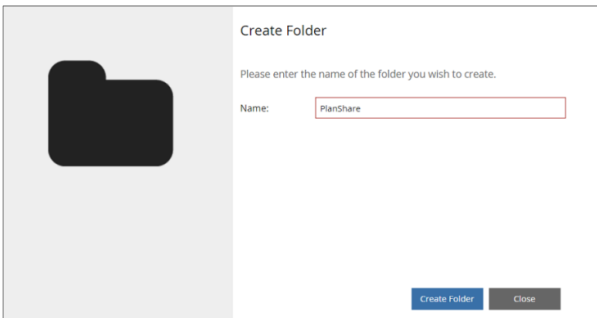
When you have entered a name and clicked the blue **'Create Folder'** button, the window will close and the new folder should appear at the bottom of the list of document folders.
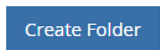
Create Folder

If you'd like to organise your documents into separate folders, simply repeat the process to create more folders.

Tip: if you intend to use the same format of folders you can create folder templates. The first time you add the folders you desire, click the **'Save folder structure as template'** *button.* 💾 *You can give your templates a name and the next time you go to add folders, simply click the* **'Load folder structure from template'** 🖨 *button for quick and easy adding.*
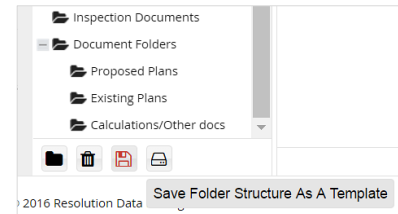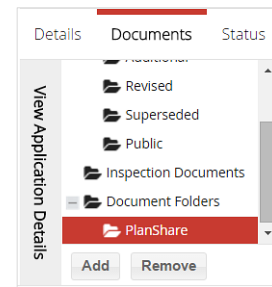
Adding documents to the folder

To add documents to the folder, you will need to select the **'Original'** documents folder so that a list of the application's documents becomes visible.

Your screen will also need to be zoomed out enough so that all the document folders become visible, making it easy to drag and drop documents into your newly added folder at the bottom of the list.

You will now be able to drag a document by clicking on it in the list and dragging it to your new folder. To drag more than one document at a time, keep your finger on the **'Shift'** button of your keyboard while clicking on all the documents you require. You can then let go of the shift button and drag your documents to the folder (see image below).
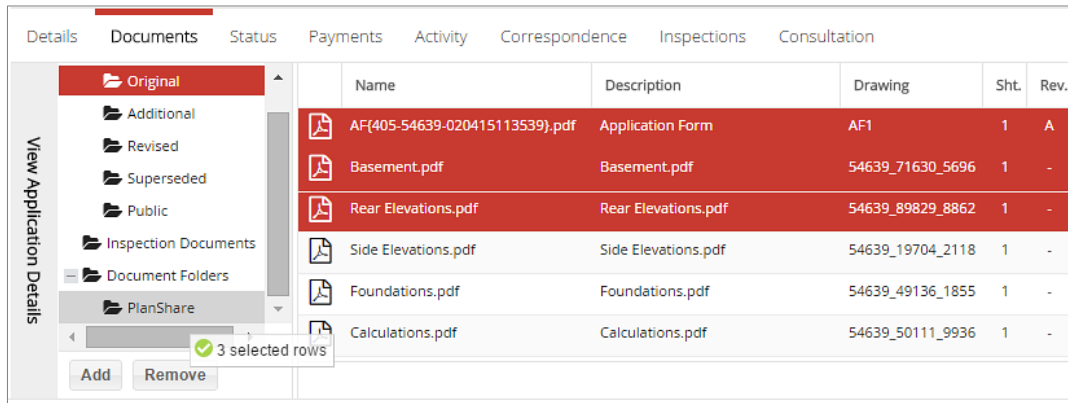
When dragging the document(s) the documents themselves will not appear to move. Instead a hovering notification box will appear telling you how many documents you are dragging. As your cursor approaches the folder you will know when to drop your documents as the red **'don't drop'** icon will change to a green **'ready to drop'** tick icon in the notification box. Simply hover over the folder with your cursor and take your finger off the mouse to deposit them.
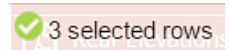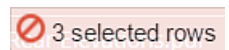
If you click on your folder to open it you will see that copies of the documents you dragged have now been added. The original documents remain in your **'Original'** documents folder. If you need to add documents from any other of your folders, repeat the process.
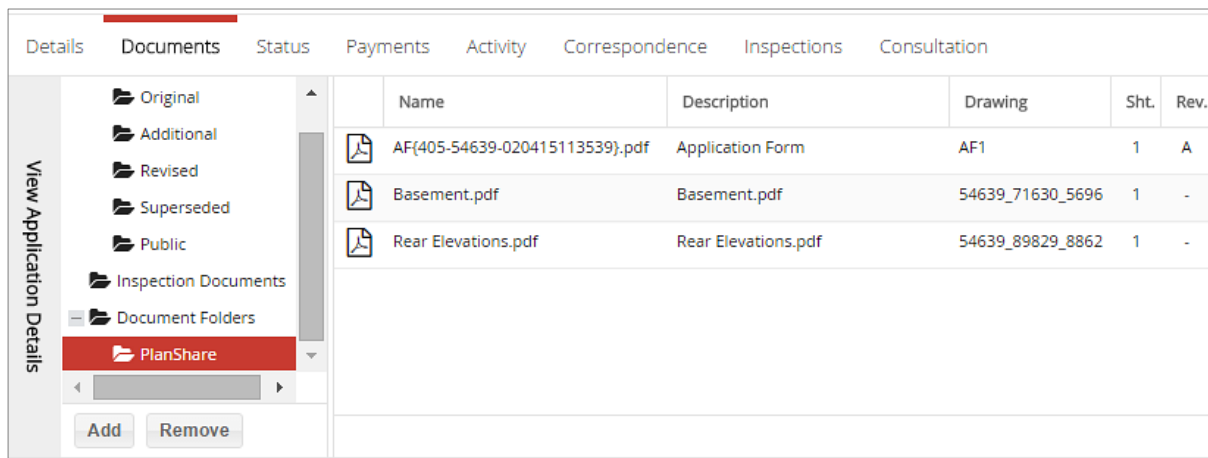
2. Sharing the Folder

Once have added all the documents you wish to share with your consultee, you are now ready to share the folder. To do this you will need to remain in the **'Documents'** tab.

Right click on your new folder and select **'Share Folder'** from the drop down list that appears.
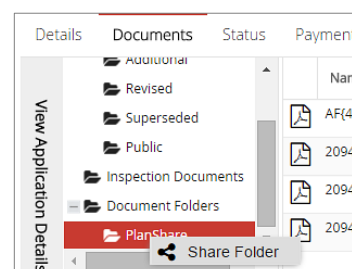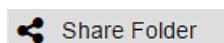
After clicking **'Share Folder'**, you will be given the option to set an expiry date for the consultation if you wish. Simply use the drop down calendar to select a date or if you do not wish to set an expiry date then leave the **'PlanShare never expires'** box.

Once you have saved your changes a new window will appear on your screen where you will add the email addresses of the consultees you wish to share the folder with.
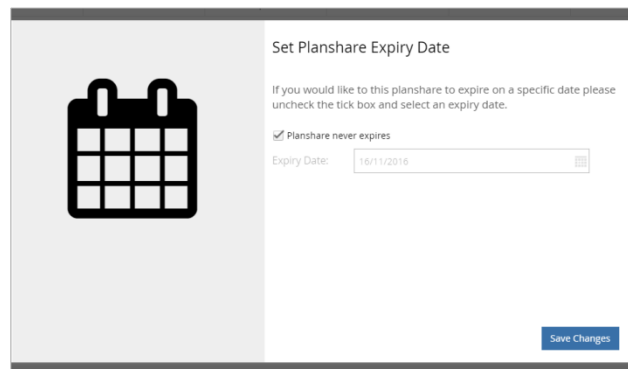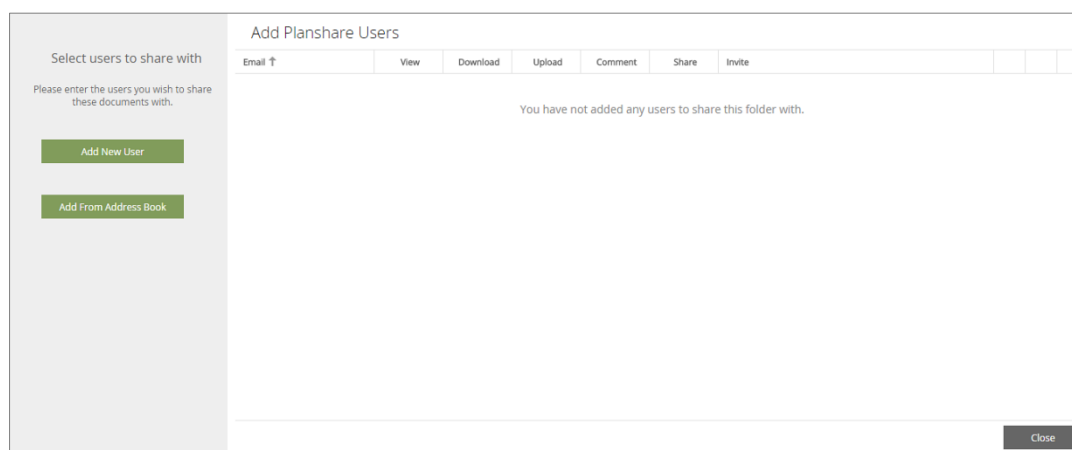
You are given the option of either adding an email address manually or from your address book.

Adding an email address manually

To add an email address manually click on the green **'Add User'** button.

The **'Add Planshare User'** window will open asking you to add the consultees name and email address and any message you would like to include in the email that will be sent to them. The email sent to them will already include a standard invitation message with details of the application so this box can be used to add any personal or specific details that you wish to send.

You will also be able to select settings regarding what the consultee will be able to see and do in the PlanShare, such as allowing viewing, commenting, sharing and the upload and download of documents.

Finally by selecting the **'Add User to Address Book'** box, the next time you wish to share a folder with this contact, you will be able to select them from your address book.

Once you have completed all the necessary details and selected the required settings, click the green **'Add Planshare User'** to share the folder with the consultee.

The consultee will now appear added. It will also display the invite message you added and the settings you applied before sharing. Simply click **'Close'** to confirm the share.

You change their details or the settings by clicking on the **'Edit'** icon.

You can remind the consultee about the PlanShare at any time by resending them the invite email by clicking on the **'Resend Email'** icon.

To remove the consultee click on the **'Trash'** icon.

To add more users repeat the process.

Click **'Close'** to exit the window.

Adding an email address from your address book

To add a contact from your address book, click on the **'Add from Address Book'** button.

Add From Address Book

The first time you attempt this you will be asked to add contacts by clicking on the red click **'here'** link.

A

B

C

D

E

You do not have any contacts yet, click here to create a new contact.

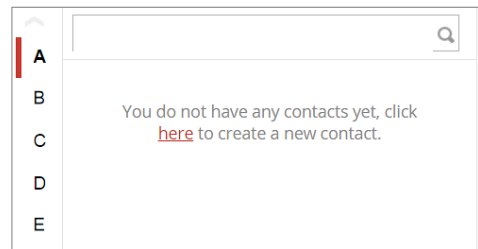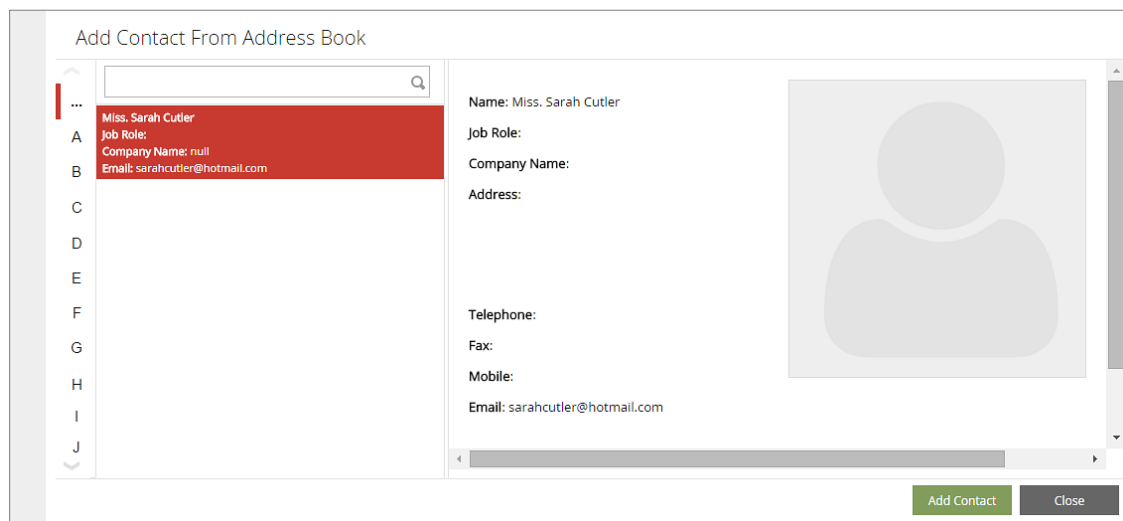Once you have contacts in your address book, you can search for them by using the letters running down the left hand side of the address book using the arrows to move up and down between letters or by typing the name in the search box at the top.

Click on the user in the list so that they are displayed in the space to the right of the box and click **'Add Contact'.** You will then be asked to select your settings before sharing the consultation with them.

Add Contact

Add Contact From Address Book

Miss. Sarah Cutler
Job Role:
Company Name: null
Email: sarahcutler@hotmail.com

A
B
C
D
E
F
G
H
I
J

Name: Miss. Sarah Cutler

Job Role:

Company Name:

Address:

Telephone:

Fax:

Mobile:

Email: sarahcutler@hotmail.com

Add Contact   Close

By closing the window and returning to the **'Documents'** tab, the folder will now have a **'Shared'** icon beside it to show that it has been shared.

Now if you right click on the folder, you will be presented with options to **'Add/Remove Users'** or view the consultation - **'Goto Planshare'**.

Superseded
Public
Inspection Documents
Document Folders
PlanShare

Name

AF{405-54(
Basement.

Unshare Folder
Goto Planshare
Add/Remove Users

Add   Rem

2016 Resolution D
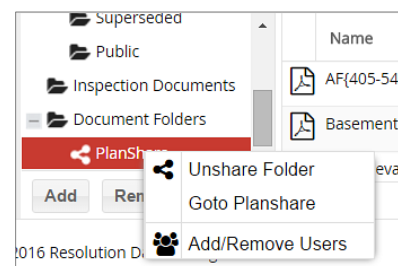
In addition, if you now go back to the **'PlanShare'** tab in your main account menu and select the **'Shared by Me'** tab, the PlanShare will now be listed, along with the name of the folder you shared and the date you shared it.

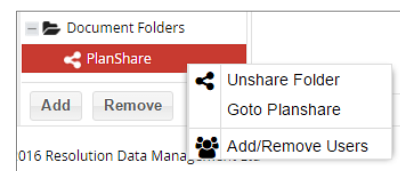The **'PlanShare Open'** icon will appear in the **'Status'** column to the far right.
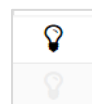

3. Unsharing the Folder

Once all your consultees have commented and the consultation has reached its conclusion, you may wish to close the PlanShare and terminate any access that the consultees have to it. It may be that during a consultation you have noticed a detail that needs changing or a document that shouldn't be present. By unsharing the folder you can make the changes you need and then reshare it with your consultees again, allowing them access once more. *For how to remove a document from the folder, see the* *'PlanShare Documents' section.*

You can unshare a folder simply by going to the **'Documents'** tab in the application and right-clicking on the folder that you shared. Select the **'Unshare Folder'** option in the drop down list.

Now if you look at the PlanShare listed in the **'Shared by Me'** tab under the main **'PlanShare'** tab, the **'PlanShare Open'** icon will now have changed to the greyed out **'PlanShare Closed'** icon.

To unshare the folder with a specific consultee, right-click on the folder and select the **'Add/Remove'** option which will open the **'Add User'** window shown earlier where you can remove the user.

Resharing the Folder

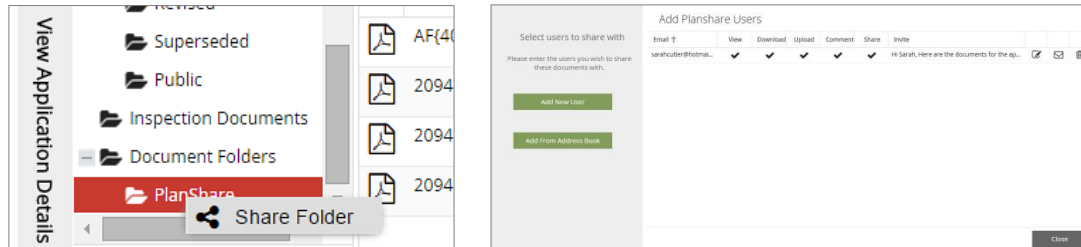To reshare the consultation once your changes have been made, right-click on the folder and select **'Share'.** The **'Add Users'** window will open with a list of the consultees that the folder was originally shared with. Simply click **'Close'** to complete the resharing of the folder.

Section C: Viewing a PlanShare

1. Viewing a PlanShare

Once the application documents have been deposited into a folder and shared, the documents are transformed into a consultation or 'PlanShare'. You can view the PlanShare in two ways.

You can open it from the main **'PlanShare'** tab by either double-clicking on the PlanShare in the list, by clicking on it once to select and highlight it and press the **'View'** button on the toolbar or you can right click on a PlanShare and select **'View'** from the drop down list that appears.

You can also view the PlanShare by going to the application's **'Document's** tab, right clicking on the folder that you shared and selecting **'Goto Planshare'** from the drop down list that appears.
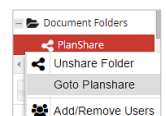
An open PlanShare will look like this:
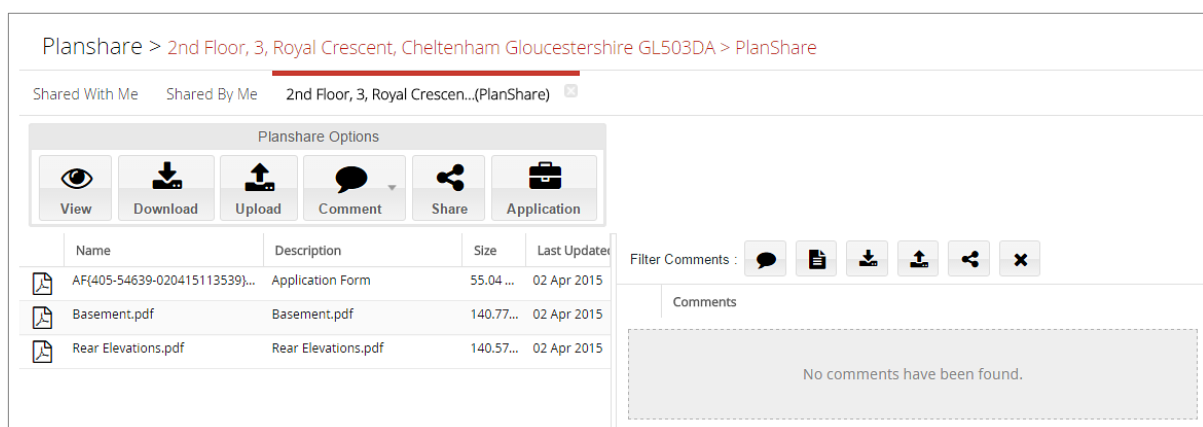
To the left of the screen will be the list of included documents while to the right will be the comments section. Above is a tool bar where the consultee can download or upload documents, add a comment or share the PlanShare. If any of these functions have been disabled in the settings before the folder was shared with the consultee, the corresponding buttons on the consultee's toolbar will also be disabled.

Note: Switching easily between PlanShare and Application

The local authority has one button that the consultee <u>will no</u>t have, the view **'Application'** button. Pressing this button will allow the authority user to open and view the original application in DSLive.

To switch from the application to viewing the PlanShare, go to the application's **'Document's** tab and right-click on the folder that you shared, selecting **'Goto Planshare'** from the drop down list.
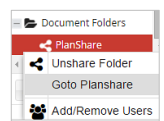
Section D: PlanShare Comments

1. The Comments Tab

Comments can be made as general PlanShare comments and as document comments. These comments are recorded under the comments section to the right of the screen, along with a log of activity taking place in the PlanShare such as the downloading or uploading of documents. When a new comment is posted, all email addresses that the folder was shared with are sent an email notification.

Whenever you open a PlanShare in DSLive to view it, a list of all comments and activity will appear in the comments section, however you can use the **'Comments Filter'** to choose specific types of comment to view.

 This button allows you to view all general comments added to the consultation.

 By selecting a document in the list and clicking this button, you will be able to view a list of document comments that have been added to that specific document.

 By selecting a document in the list and clicking this button, you will be able to view a list of download activity connected to that specific document.

 By selecting a document in the list and clicking this button, you will be able to view a list of upload activity connected to that specific document.

 By clicking on the view button, you can view a list of sharing activity.

 The clear filter button will allow you to view a list of all general comments, document comments and activity in the consultation.
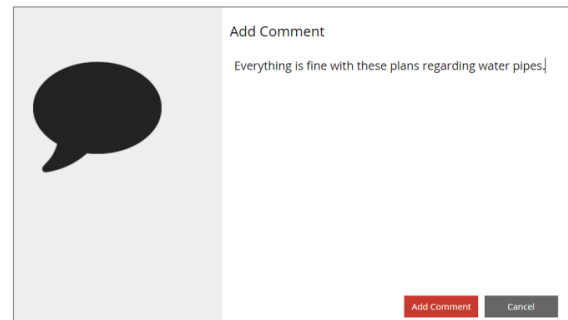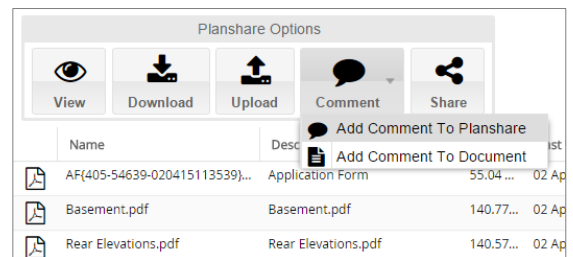
2. Adding a General Comment

To add a general comment, simply click on the **'Comment'** button on the toolbar and select **'Add Comment to Planshare'.**
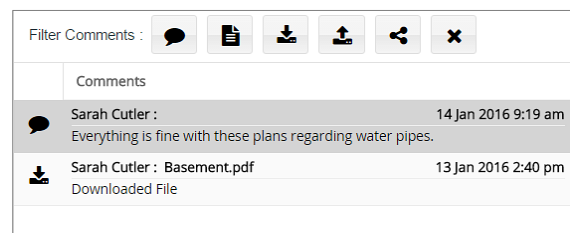

A new comment window will open. Simply click on the white box to start typing your comment.

When your message is ready click the red **'Add Comment'** button.
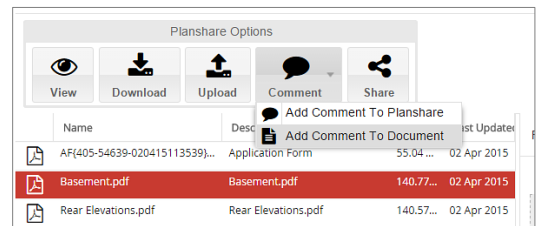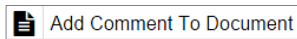

Your comment can now be viewed in the comments section with the date and time it was posted.

Both the Plansharee and all consultants are sent an email notification of the new comment.
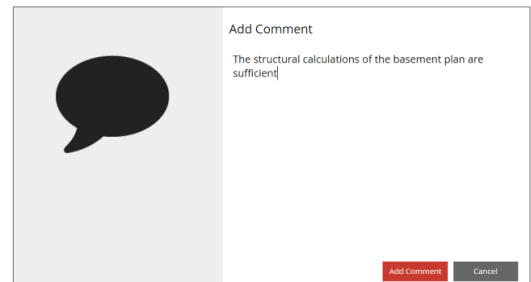
3. Adding a Comment to a Document

To add a comment to a document, click on the document in the list to select it and click on the **'Add Comment'** button on the tool bar.

 Add Comment To Document

The **'Add Comment'** window will open allowing you to type in your comment. Click the red **'Add Comment'** button to add it to the document.

Add Comment

The comment will now appear in the comments section. To view the comment simply click on the document in the list to select it and the comment that has been added to it will appear in the comments section to the right with the name of the person who added it and the date and time it was added.

The comment will also be visible when you choose to view a list of all comment types and consultation activity together. To do this simply press the **'Clear Filter'** button.
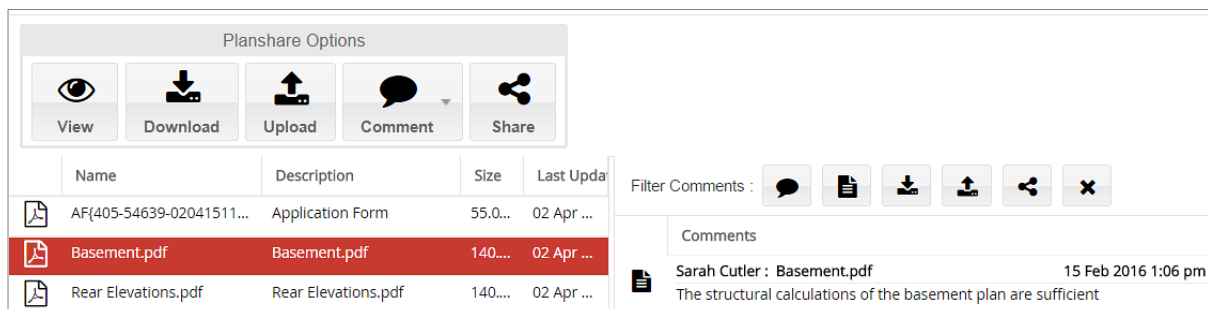

Section E: PlanShare Documents

1. Viewing, Downloading and Uploading Documents

Viewing Documents

To view a document you can either double-click on the document in the list or click on it once to select it and press the **'View'** button on the tool bar.

The document will open in our DataSpace Live Document Viewer. The DataSpace Live Viewer comes with a range of tools for measuring, marking and redlining which we look at in the *'Document Tools'* section further on in this guide.
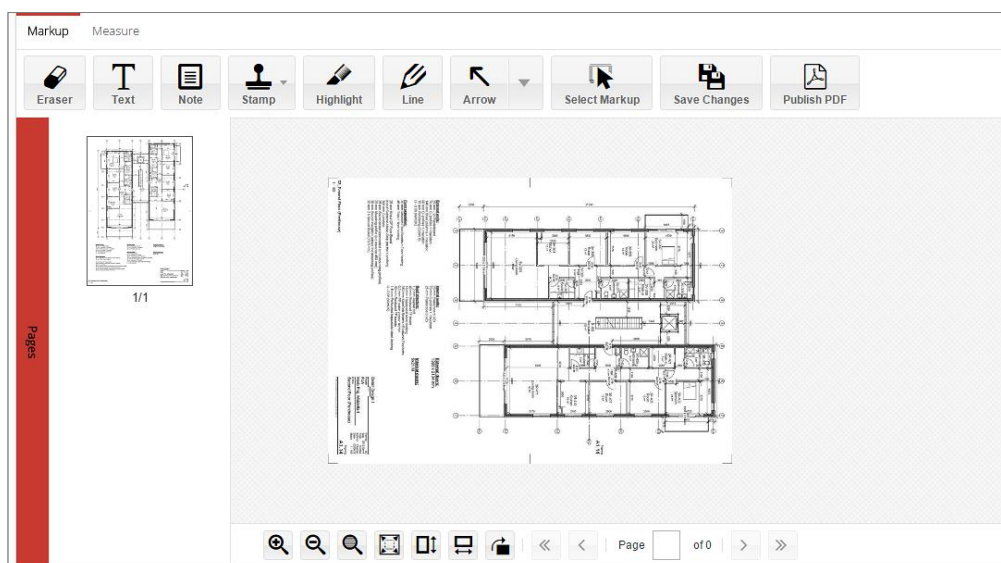
Note: *If your internet browser is blocking pop-ups you may be prevented from viewing a document in the viewer. You will need to unblock pop-ups for DataSpace Live:*

How do I do this?...
Watch a video tutorial: *http://www.screencast.com/t/mGqWVABqaN*
Download a guide sheet: *http://www.screencast.com/t/q2HG2d8ay*

Downloading Documents

To download a document listed in the consultation simply click on the document once in the list to select it and click on the **'Download'** icon on the tool bar.

A message will appear on your screen telling you that your document is ready to download. Click the **'Download File'** button to continue. The document will be downloaded to the **'Downloads'** folder on your computer.

The activity of downloading a document is logged in the comments section to the right. By clicking on the document in the list to select it and pressing the **'Filter by Downloaded'** button, the activity will be displayed.

Uploading Documents

To upload a document simply click the **'Upload'** icon on your tool bar.

The **'Add Additional Documents'** window will open (see image below). Pressing the red **'Select Files'** button to the left hand side of the screen will take you to your PC folders where you can select the document you wish to upload. Once you have selected the desired file it will be uploaded into this **'Additional Documents'** window.

To add multiple documents, hold the **'Ctrl'** key on your keyboard when selecting the documents from your PC folder.

To add the documents to the consultation, click the green **'Add Files to Application'** button.

You should now be able to view the added document in the list of consultation documents. The activity of uploading the document will be logged under the comments section. By clicking on the document in the list to select it and pressing the **'Filter by Uploaded'** button, the activity will be

displayed. Whenever a document is added to the consultation, the Plansharee and all consultees are sent an email notification of the new addition.

Removing a Document

If you wish to remove a document that you have added to a consultation, you will need to visit the application's **'Documents'** tab and select the shared folder so that a list of its documents becomes visible.

Right click on the document you wish to remove and select **'Remove from Folder'** on the drop down list that will appear. When you now view the consultation, the document will not appear under the list of documents it contains.
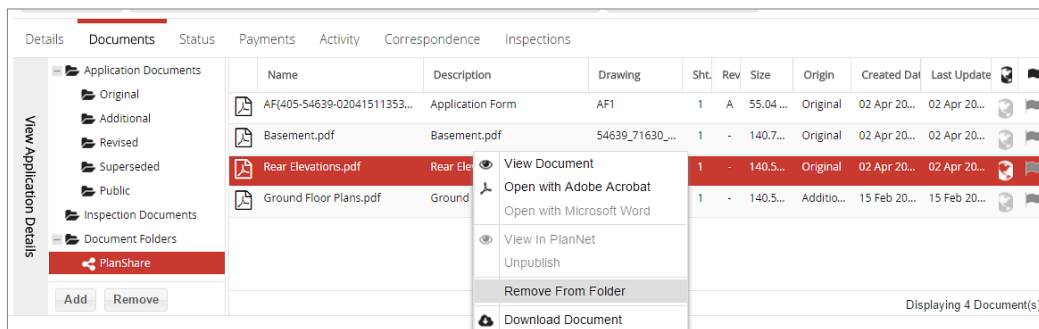
2. Document Viewer Tools

Introduction: The Document Viewer Tabs

When the viewer opens you will notice a number of tabs along the top, bottom and the left hand side.

The two tabs along the top are called the **'Markup'** and **'Measure'** tabs. Here you will find all your tools for marking-up, redlining, measuring and calibration. To switch between tabs simply click your cursor on the tab title.

At the bottom of the viewer you will see a fixed **'Viewing Bar'** tab with all your viewing options, such as zooming in and out, rotating and fitting the document to the size you wish to view it at.

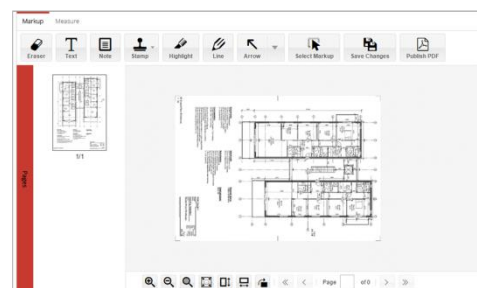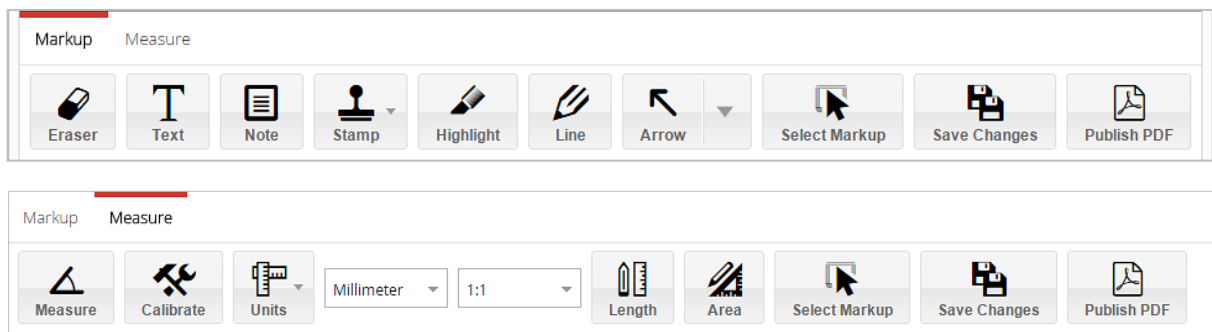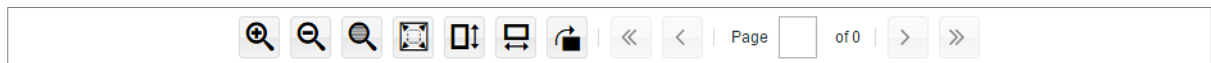If you have more than one page in a document, you can use the page navigation arrow bar on the bottom right to move between them. You can also view the pages by clicking on the **'Pages'** bar to the left hand side of the viewer.

On the left hand side of the viewer you will also have a **'Pages'** tab. When you click on the bar it will slide open to display a list of pages and included in that document and you will be able to switch between the pages simply by clicking on them.

Note: *If your internet browser is blocking pop-ups you may be prevented from viewing a document in the viewer. You will need to unblock pop-ups for DataSpace Live:*

> **How do I do this?...**
> Watch a video tutorial: *http://www.screencast.com/t/mGgWVABqaN*
> Download a guide sheet: *http://www.screencast.com/t/q2HG2d8ay*

The Viewing Bar

Zooming

On the viewing bar you have buttons for zooming in and out on the document and in addition, for zooming in on a specific area of a document.

To zoom in on a specific area of a document, select the **'Zoom Area'** button and you will be able to drag an area selection box over the area you wish to zoom in on. Once you have let go of the mouse the viewer will zoom in automatically.

To return to normal zoom, simply click on the **'Zoom Out'** button.
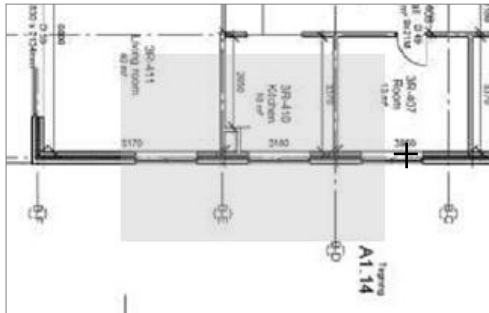
Area Selection Box

Document Fit

For more viewing options, you can choose to view the document by **'Fit Screen'**, **'Fit Height'** or **Fit Width'.** Simply click the relevant button to apply.

Fit by Screen
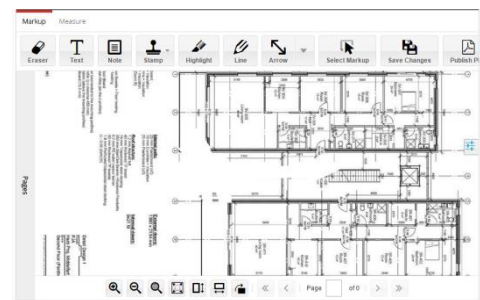
Fit by Width

Rotating a Document

To rotate a document in the viewer, simply keep pressing the **'Rotate'** button until you reach the desired view.

The Markup Tab

Adding Text or a Note

Under the markup tab you can add text or a note to a document. To do this simply click on the **'Text'** or **'Note'** button on the tool bar and then click on the document.

A new **'Add Text'** or **'Add Note'** box will open over the document.

Type your text into the text fields provided and click **'Ok'**.

Add Text Box

Add Note Box

The 'Text' will appear as written text on the document while the 'Note' will look like a Sticky Post It Note.

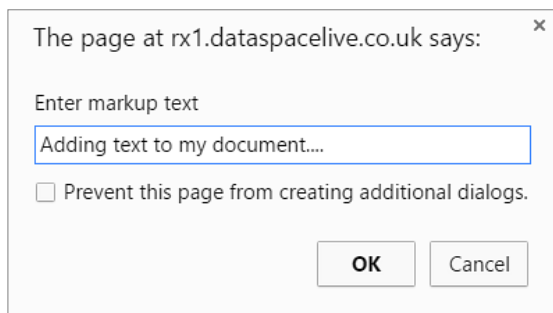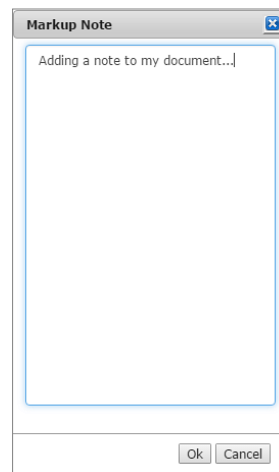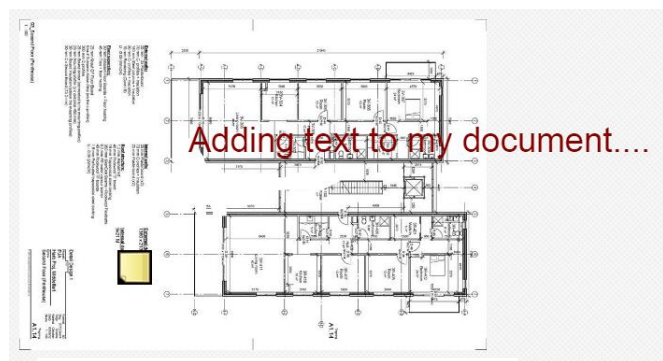You will now be able to move, edit or delete your new item.

Text and Note added to document

Moving and Editing a Text or Note

Once you have added a text or note to a document, click on the **'Select Markup'** button on the tool bar to move, edit or delete it. You will use this button to select any markups or measurements you add to a document.
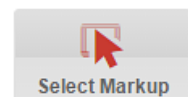
Once you have clicked on the **'Select Markup'** button and it has turned red, click on the middle of the 'Text' or 'Note' on the document and blue circles will appear around the item. When the blue circles appear the item is ready to be moved. Without letting go of the mouse you should now be able to drag the item around the document.
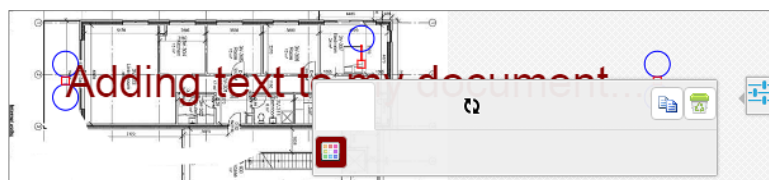
Text item with Edit Box

You will also notice that a small box appears near your item, this is your **'Markup Edit Box'** providing you with options for editing or deleting the item from your document. You can close this box by clicking on the **'Close Box'** button.

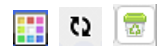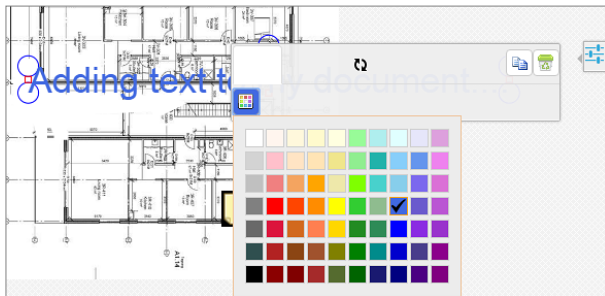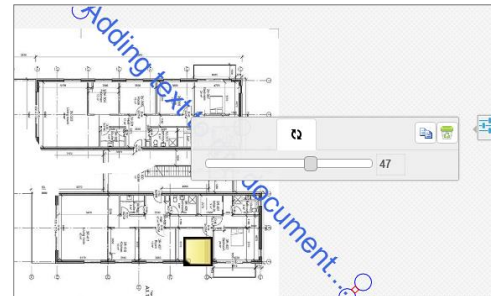For the **'Text'** item in the 'Edit Box' you can change the colour of your text by clicking on the **'Colour Chart'** button and to rotate the item by clicking on the **'Rotate'** button and sliding the slider tool to the left or right. Click the **'Trash'** icon to delete your item.

The 'Note' does not come with any edit options.

'Changing Text Colour'   *'Rotating Text'*

The Stamp Tool

The **'Stamp'** tool allows you to stamp a document with a status. To add a stamp simply click on the **'Stamp'** button on the mark-up tab tool bar and choose a status from the drop down list that will appear.

As we saw earlier with the **'Text'** tool, by selecting the stamp using the **'Select Markup'** button, you will be able to move the stamp around the document and in the 'Edit Box' change the colour of the stamp, resize it, rotate it or delete it

The stamp will added to the document with the name of the user who added it and the date it was added.
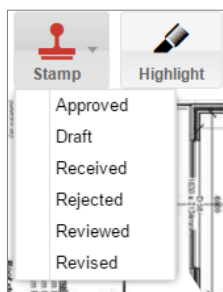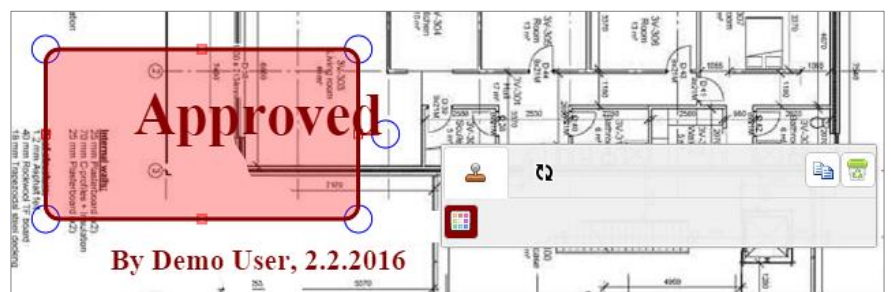
Status Stamps   *Approved Stamp*

The Highlight Tool

The **'Highlight'** tool allows you to highlight a particular section of a document. Simply click on the **'Highlight'** button on the mark up tab tool bar and you will be able to drag an area selection box over the area you wish to highlight. When you let go of the cursor the area will appear automatically highlighted.

By selecting the item using the **'Select Markup'** button on the toolbar you can rotate the area, change its size or even drag the item to a different position on the document. In the 'Edit Box' that appears, you can rotate the highlighted are or delete it.
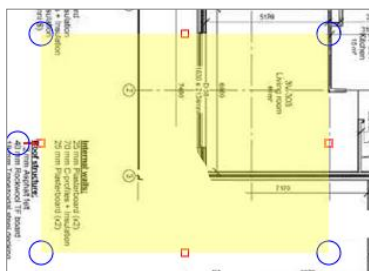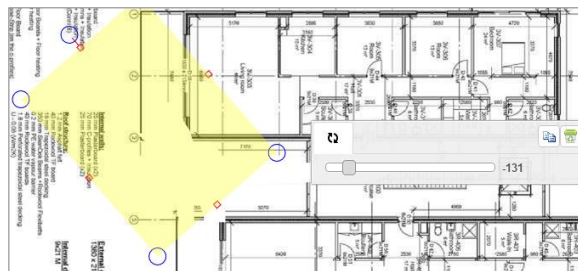

Highlighted Area   *Rotating Highlighted Area*

The Line Tool

You can add a line or multiple lines to a document using the **'Line'** tool. Simply click on the **'Line'** button on the mark up tab tool bar. Click on the document and without letting go of the mouse, drag your cursor along the document to draw a line.

By selecting the line using the **'Select Markup'** button, you can drag it to another position on the document or using the 'Edit Box', change the colour or thickness of the line or delete it.
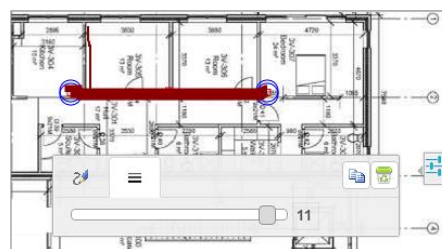

The Arrow Tool

Using the **'Arrow'** tool you can add a range of arrows to a document. Simply click on the **'Arrow'** button on the mark up tab tool bar and choose a type of arrow from the drop down list that will appear.

Click on the document and without letting go of the mouse, drag your cursor along the document to draw your arrow.

By selecting the arrow using the **'Select Markup'** button so that blue circles appear around the arrow, you change its direction, size, length and position. Using the 'Edit Box', you can also change its colour, thickness of the line, type of arrow or delete it.
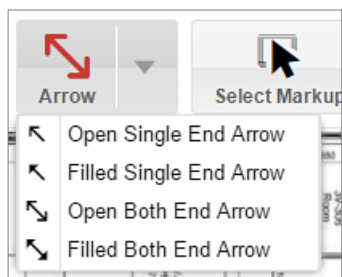
Arrow Types
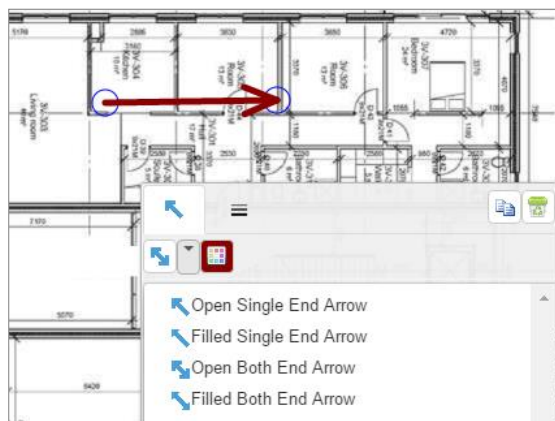
Changing arrow type

The Eraser Tool

You can erase any item added to a document using the **'Eraser'** tool. Simply click on the **'Eraser'** button the mark up tab tool bar and rub away at an item with your cursor.
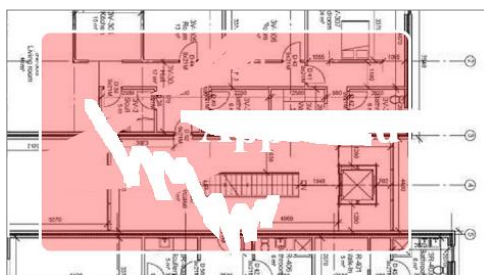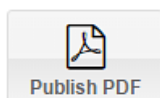

Erasing Item

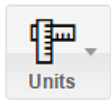### Saving and Publishing Changes

You can save any markups made to a document by clicking on the **'Save Changes'** button.

If you are a Local Authority Planning Department, you will also have a **'Publish PDF'** button.
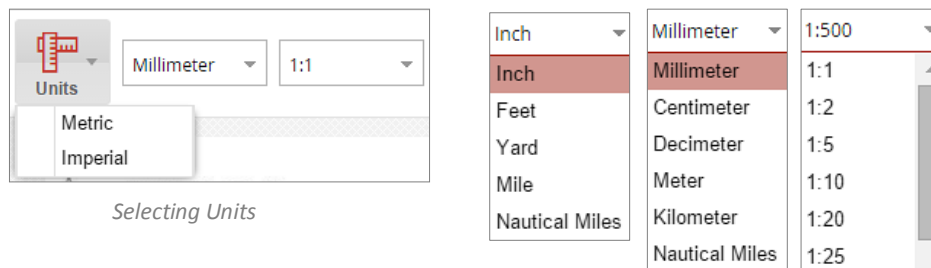
The Measure Tab

Measurement Units & Scale

Under the measure tab you can switch measurement units between metric and imperial. Simply click on the **'Units'** button and select the required unit from the drop down lists. The selected unit will be shown in the box to the right.

You can also adapt the measuring tool to the scale of the drawing by selecting the scale from the **'Scale'** field to the right of the **'Units'**
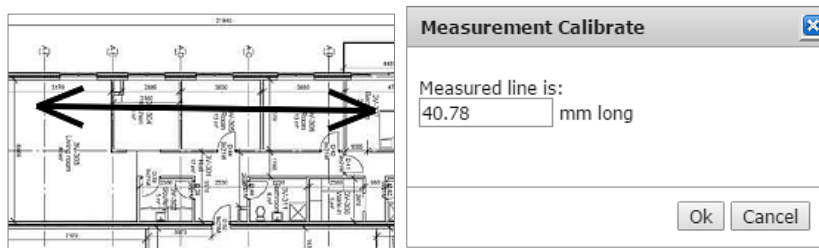

Selecting Units

Selecting Units and Scale

The Calibration Tool

To assess the calibration of a document, simply click on the **'Calibrate'** button on the measure tab tool bar.

Click on the document and drag the arrow from one point to another to assess the measurement calibration. When you let go of the cursor, the **'Measurement Calibration'** results box will open.

Selecting area to assess

*Calibrate Results Box*

The Free Measure Tool

Under the measure tab you will find specific tools for measuring lines and areas. You can also use the '**Free Measure**' tool to measure parts of a plan yourself.

Simply click on the **'Measure'** button on the measure tab tool bar.

As you click on the plan and drag the cursor a measuring line will appear. When you reach the end measuring point double-click on the mouse and the **'Measurement Results'** box will open displaying the measurement.

If you are measuring an area, only click once with the mouse when you reach the first point to fix it in place and then continue to drag the mouse in the required direction to create an area. Double click when you reach the last point to open the **'Measurement Results'** box.
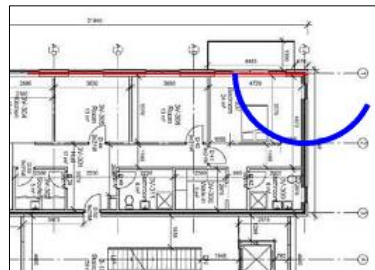
First line added   *Second line added creating area*   *Measurement results box*

The Length Measure Tool

To measure the length of a document detail, simply click on the **'Length'** button on the tool bar. Click on the document at your starting point and then drag the cursor to your required end point and let go of the mouse. A bar with the measurement will appear on your document.

By selecting the measurement with the **'Select Markup'** button on the tool bar, you can move the measurement bar around on your document to measure other lengths. In the 'Edit Box' you can change the colour, form and thickness of the bar or delete it.
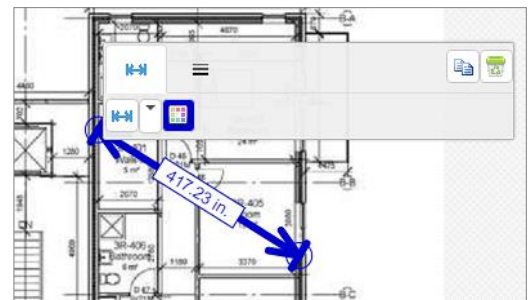
Measurement Bar   *Changing colour, thickness and position*

The Area Measure Tool


The **'Area'** measure tool allows you to measure and mark specific areas on a document. Simply click on the **'Area'** button and the drag your cursor along the document to mark your first line, clicking once with the mouse when you reach the first point. Continue to drag the mouse in the next required direction to create an area and double click when you reach the last point to fix the lines in place. The measurement is displayed in a bar on the document.
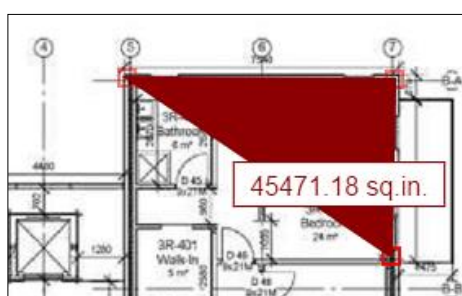
By selecting the item with the **'Select Markup'** button on the tool bar, you can drag the area to a different position on the document, or using the 'Edit Box', change the colour or thickness of its lines, fill the area with colour or pattern, or change the shape of the area by moving its points.
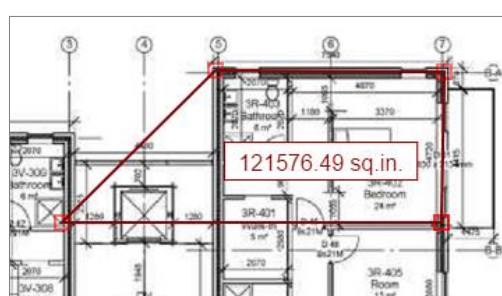

First line added
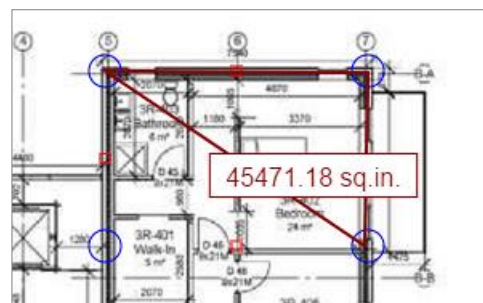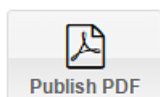

Second line added creating area

Area Fill

Moving area points

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The DataSpace Live Guide

DSLive Guide Sheets:
http://www.screencast.com/t/NGSxmK1gnyO

Help & Support: helpdesk@resolutiondm.com 01242 260505