

Simple Steps for sharing a PlanShare

Step 1

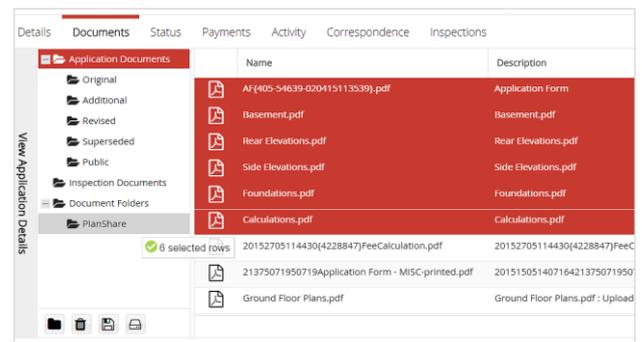
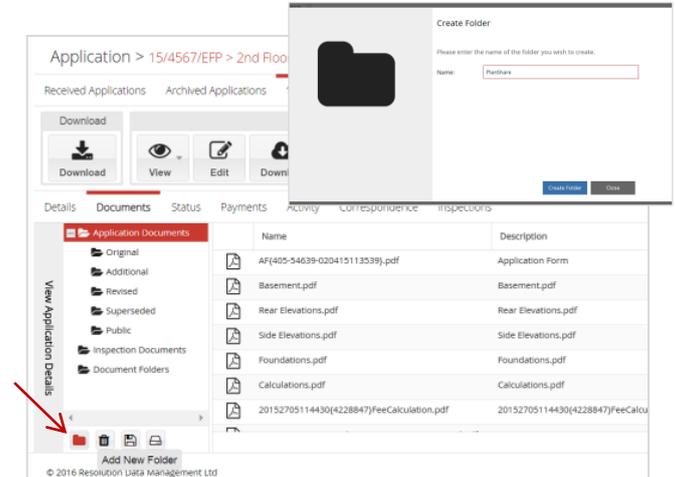
Open an application and select the application's 'Documents' tab.

Create a new folder using the 'Create Folder' button and give it any name you like.

You can now click on a document in the list and drag and drop it into your new folder, which will deposit a copy.

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 until they are highlight in red.

You can then let go of the shift button and drag and drop your documents into the folder. Make sure your screen is not zoomed in.

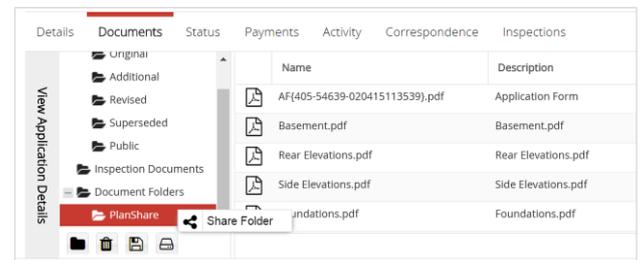


Step 2

Right-click on your new folder and select 'Share'.

When prompted add an individual or multiple email addresses and select your share settings for each.

Once added click 'Close' to complete the share and the recipient will be sent an email with a link directing to the PlanShare online where they can view its documents and post comments.

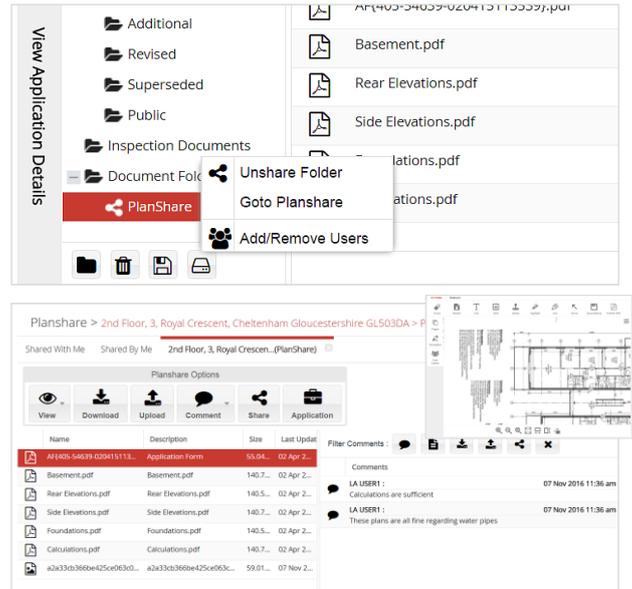


Step 3

To view the PlanShare consultation you've created, right-click on your new folder and select **'Go to PlanShare'**.

Here you can monitor the activity and comments of your invited consultees as well as post comments of your own.

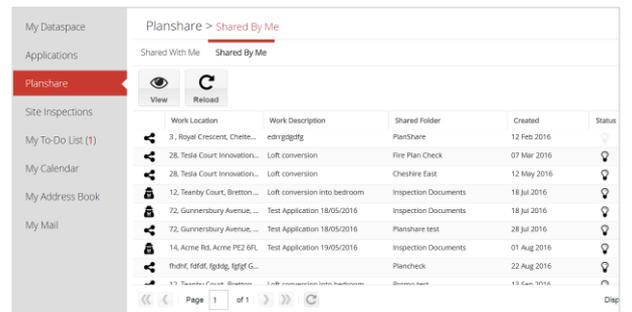
You can also right-click and **'Add/Remove'** recipients or completely **'Unshare'** your folder disabling access to the PlanShare if you wish.



Step 4

View a list of PlanShares you have shared or that have been shared with you under the PlanShare tab.

Double-click on a PlanShare in the list to view it.



CONTACT US

If you need assistance during any of the above steps we're here to help!

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RESOLUTION

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