



Introduction to Plan Share for Plan Approvers

Plan Share allows organizations such as contractors and utility companies to plot and plan their planned road events and the traffic management plans (like lane closures, detailed scheduling information, and detours) then submit these plans to road agencies for review and approval. The full process is digital, with an audit trail for changes and messaging between users. Plan Share can be integrated into your organization's submittal/approval process, whether that is permitting or closure notification systems.

Functionality for Plan Share depends on whether you are a submitting organization (contractor, utility), or approving organization (approvers are normally road agencies or an organization working on behalf of a road agency). In general, the purpose of plan share is to provide a geospatial planning tool and approval process, where submitters and approvers can work more cohesively – to ultimately make the most efficient use of road space when a temporary road event (like a work zone) is underway.

How to access Plan Share

1. When you login you may be directly taken to the Plan Share module but if not click on the 'apps' icon in the top right-hand corner of the screen.
2. Select 'Plan Share' from the drop-down menu.
3. The page will load and take you to Plan Share.

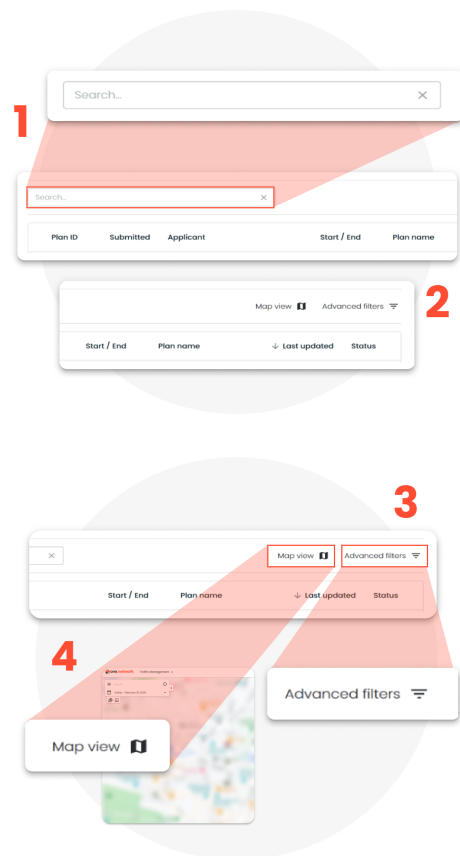




Plan Share Dashboard

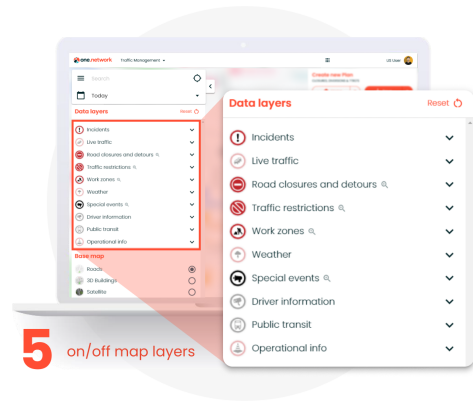
The Plan Share Dashboard has 2 main views: a list view and a map view. To switch between these views, click the 'List view' or 'Map view' button in the upper right corner.

1. **Search** – use the search box to help find a specific plan
2. **Sorting**
 - In List view, click the column headers to sort by that column
 - In Map view, use the Sorting drop down to choose how plans are sorted
3. **Advanced Filters** – use these to narrow down which plans are displayed. Any filters you set are saved across your session and are applied to both the List view and Map view
 - In Map view, an additional filter option is available to only show plans within the currently visible map area
4. Clicking on a plan will bring up information about that plan and will switch you to Map view to see the geographic plan information. Clicking the Home button will return you to your previous view (list view or map view)



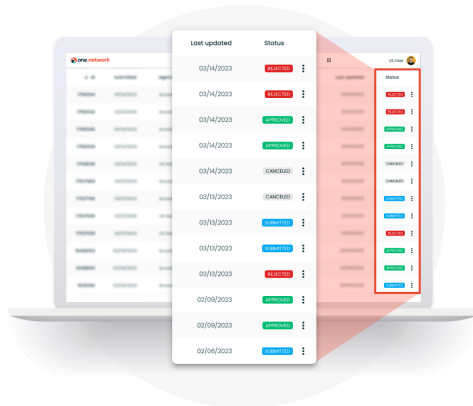


5. In the map view, the usual one.network map options are also available:
 - (LEFT IMAGE) Use the search/date filters to find the location your plan will take place
 - (RIGHT IMAGE) Turn on/off map layers to determine any potential clashes



Plan Statuses

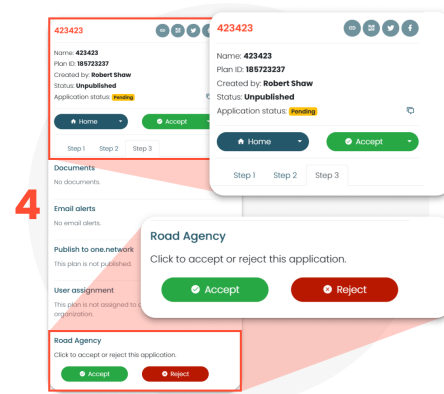
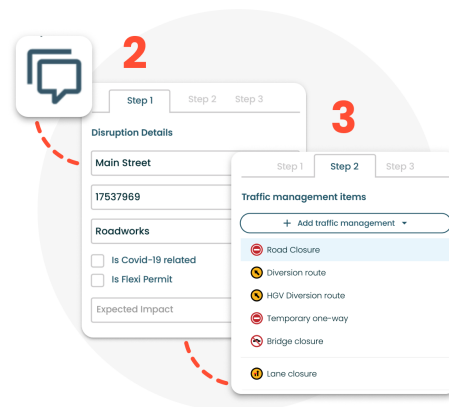
1. A plan can have the follow statuses depending on where it is in the Plan Share process:
 - **Submitted** – Plan has been sent to the road agency for review
 - **Accepted** – Plan has been reviewed and approved by the road agency
 - **Rejected** – Plan has been reviewed and rejected by the road agency
 - **Cancelled** – Plan was sent to road agency for review, then cancelled by the submitter





Reviewing a Plan

1. Select a plan to review from the 'Plans' list. If needed, the search and filter options can be used to help find a specific plan
2. Select the speech bubble to review comments provided by the submitter regarding the plan (if any), or to leave your own comments for the submitter or other reviewers.
3. Review the information in Steps 1 and 2 of the plan.
4. In Step 3, review the information, and then select either 'Accept' or 'Reject'. If rejected, the plan will be sent back to the submitter. If accepted, the plan will move to your organization and the submitter will no longer be able to edit it (unless the plan is shared back to them with edit capabilities).





Sharing a Plan

1. By sharing a plan with another organization, you are allowing them to view, manage, or edit that plan. This is especially important in cases where you would like the submitting organization to be able to edit an accepted plan
2. To share the plan with another organization, click the **'Sharing options'** button, choose the organization you would like to share the plan with, and what capabilities you would like that organization to have:
 - **View Only** – The organization can only view the plan
 - **Live Link Manageable** – The organization can activate or deactivate any Live Link enabled closures in the plan
 - **Full** – The organization can edit any part of the plan, as well as activate or deactivate any Live Link enabled closures.

