



Introduction to Plan Share for Plan Submitters

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.

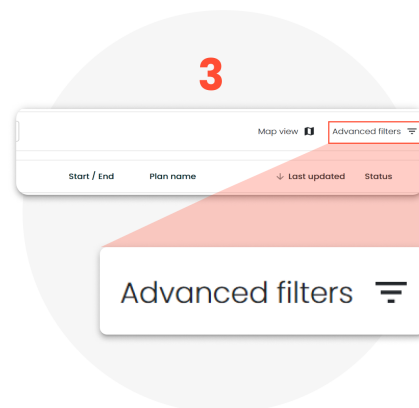
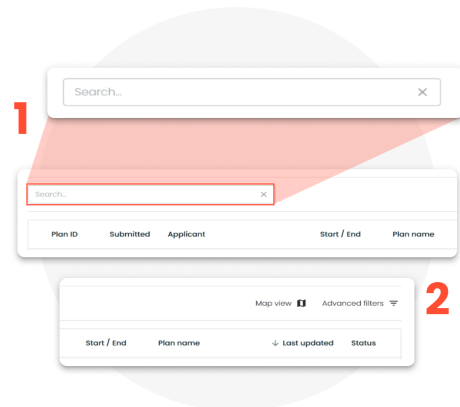




Plan Share Dashboard

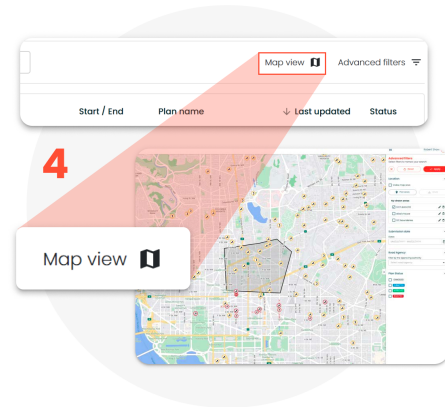
The Plan Share Dashboard has 2 main views: a list view and a map view. To switch between these views, click the 'List view' or 'Map view' button in the upper right corner.

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

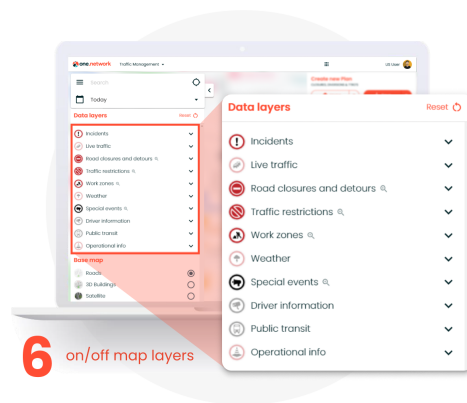




4. In Map view, an additional filter allows you to draw a polygon on the map and search for activity in that area. You can also save and name these polygons.
5. Clicking on a plan will bring up information about that plan and will switch you to Map view to see the geographic plan information. Clicking the Home button will return you to your previous view (list view or map view)



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

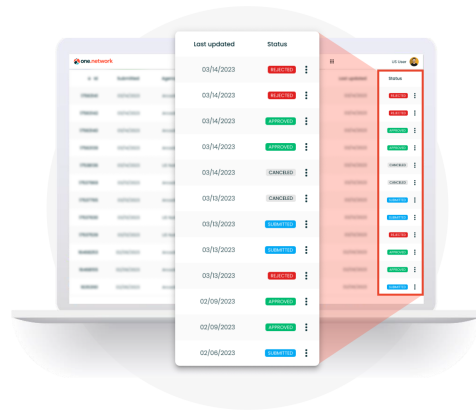




Plan Statuses

A plan can have the follow statuses depending on where it is in the Plan Share process:

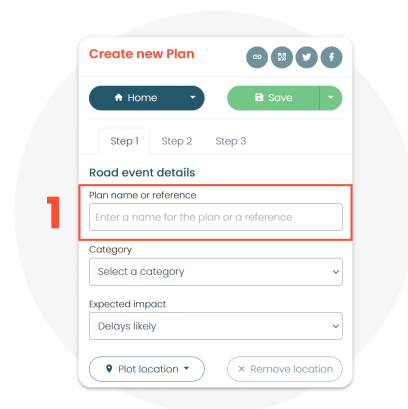
- **Submitted** – Plan has been sent to the road agency for review
- **Accepted** – Plan has been reviewed and approved by the road agency
- **Rejected** – Plan has been reviewed and rejected by the road agency
- **Cancelled** – Plan was sent to road agency for review, then cancelled by the submitter



Submitting a Plan Share application

Step 1 – Entering in a Road Event

1. In Step 1 of Plan Share, you are plotting and categorizing the overarching road event that will take place. You can either generate a new event, or link to an event that one.network has already pulled from a road agency system

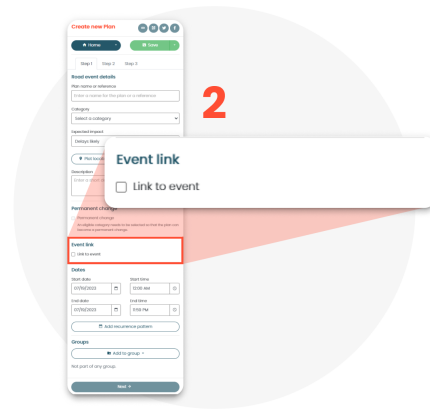


Quick Guide

Plan Share for Submitters



2. For instances when you want to link your plan to any existing information that has been imported from a road agency's systems, skip ahead to the 'Event Link' section in Step 1 to auto-populate much of the Step 1 information.



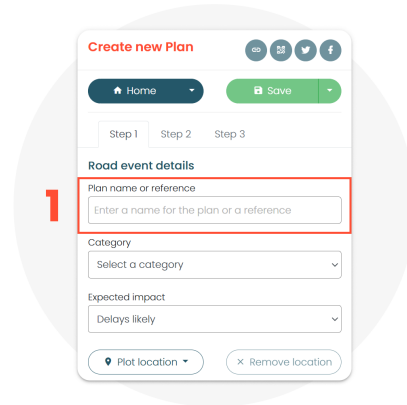
3. To link this plan to an existing road event, check the 'Link to Event' box. A drop-down box will appear and will list the imported event IDs that are currently in view on the map. Select the appropriate ID, and the Step 1 information that can be populated will be populated.



Entering Road Event Details Manually

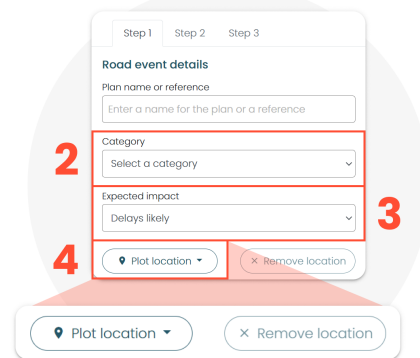
If there is no existing road event to link to, you will need to enter the road event details in Step 1 yourself.

1. Enter the 'Plan name or reference' – some road agencies have specific rules for how plans should be named, so please follow any guidance provided by the road agency you will be submitting this plan to.





2. Select the 'Category' from the drop-down list – this describes the overarching activity of the event, such as road work, special event, or incident.
3. Select 'Expected impact' from the drop-down list.
4. Select 'Plot Location'. In most cases, you should use a point to plot the location on the map. Plot your point in the middle of where you expect the event to take place. Don't worry if the event includes a road or lane closure – you will be able to plot those geometries in Step 2.
5. Select the road agency – this must be completed before moving on to Step 2. You will be presented only with the most relevant road agencies. In some cases, one.network may have enough information to determine the road agency automatically—so this field will be automatically filled. However, this should still be verified and changed if necessary.
6. (Optional) Enter the 'Description' of the plan – describing what type of activity is taking place and any information you want the public to know about this event. Keep it relatively short and to the point.



Step 1 Step 2 Step 3

Road event details

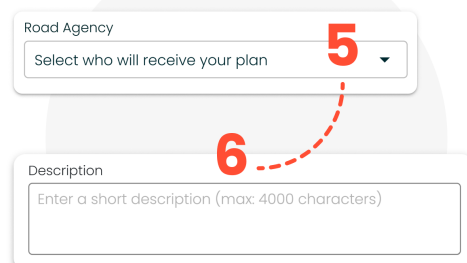
Plan name or reference
Enter a name for the plan or a reference

2 Category
Select a category

Expected impact
Delays likely **3**

4 Plot location Remove location

Plot location Remove location

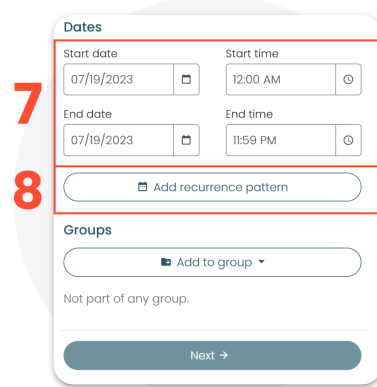


Road Agency
Select who will receive your plan **5**

6 Description
Enter a short description (max: 4000 characters)



7. Select the 'start date/end date' and the 'start time/end time' for your event.
8. (Optional) Add a recurrence pattern if the dates and times of all parts of this plan are only in force at certain times (e.g. Monday to Friday 9:00AM-5:00PM). You can add more than one recurrence pattern if necessary

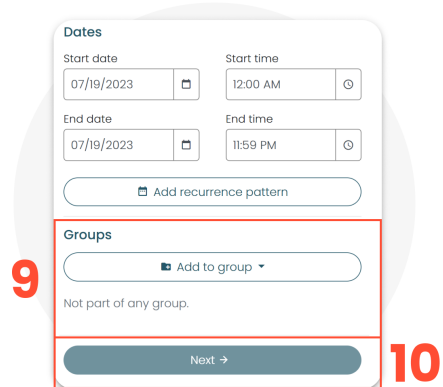


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9. (Optional) You can add your plan to a Group to keep track of certain categories of works - e.g. you might want to create a group to hold multiple plans for a large project, or a Special Events group or a 'Resurfacing Work' group to keep track of all those plans in one place. You can add the plan to an already existing group from the drop-down list.

(NOTE: If the group does not exist you can add a group from the Traffic Management app by clicking 'create new group' when you are in that app.)



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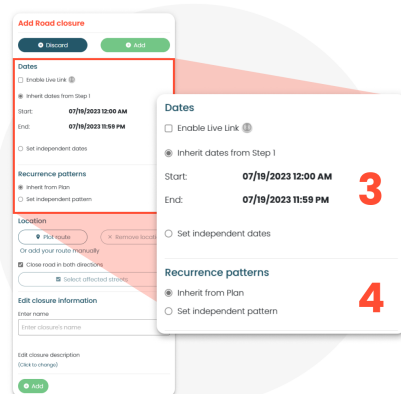
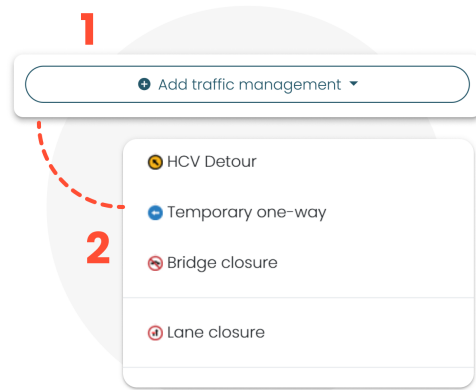
10. Click 'Next'



Step 2 - Adding Traffic Management Interventions

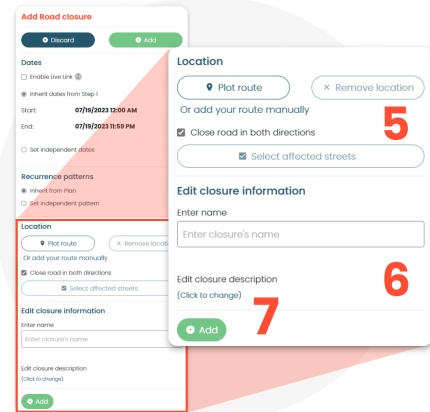
Step 2 of Plan Share focuses on enriching your road event details with information about all the traffic restrictions that might take place on the road network. This is where you can add your lane and road closure geometries, along with many other types of traffic management. The steps below can be repeated as necessary to fully describe all the interventions taking place as part of this plan.

1. Click the '+ Add traffic management' button.
2. Select the relevant Traffic Management item from the drop-down list (e.g. Lane closure or Road closure). There are over 30 options for you to choose from. You can add multiple interventions to a plan.
3. For lane and road closures, the option to 'Enable Live Link' may be available. If your organization is using Live Link to manage closures, check the 'Enable Live Link' box.
4. The dates field will automatically 'inherit dates from step 1' and it will also inherit the 'Recurrence Pattern' if one has been set - but you can customize these if you would like by selecting 'Set independent dates' and 'Set independent pattern', respectively.





5. **Location:** select 'Plot route'- where you will be plotting linear geometry strings (as opposed to points). Place the marker on the map at the start of the temporary traffic management location (A). Repeat for the end point (B). To edit the route - hover the mouse over the line, click, hold, and drag until the line follows the desired route.
6. **Enter name of your Traffic Management intervention:** This will automatically populate with a street name. You can manually change this to be more descriptive if you'd like. As in Step 1, please follow any specific naming rules provided by the road agency you are working with.
7. Click '**Add**' to add the item to your plan.



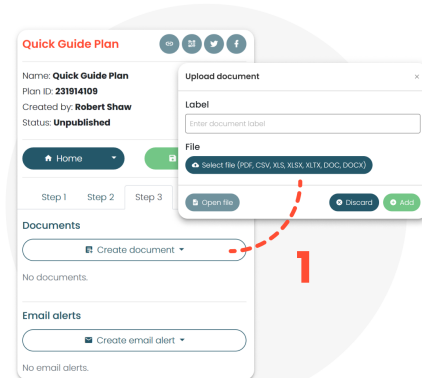
NOTE: Some traffic management interventions may have additional fields to fill in. Instructions for how to enter that information is provided in those fields.

To add more items, select '+ Add Traffic Management' and follow steps 1 through 7 again. You can also copy items you have already created and modify them. This can help you save time entering items if they are largely similar.



Step 3 – Submit your plan

1. (Optional) Create/Upload documents about the event: Click on 'Create document' and choose from the list below the type of document you would like to create:
 - Create a blank document from scratch and enter information about the works manually.
 - Use a template set up for your organization from the list (speak to your Customer Success Manager about how to set this up)
 - Upload a document (e.g., PDF) from your computer.



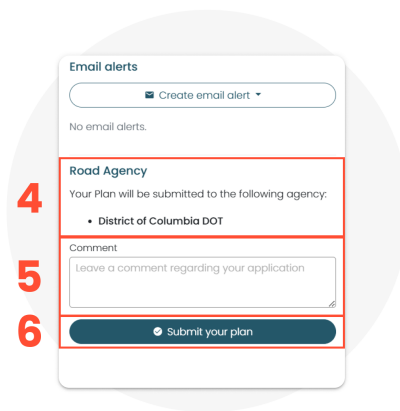
NOTE: Multiple documents can be created or uploaded to a plan.

2. (Optional) Email alerts: You can send emails containing information about the event you've just created to any party who you would like to notify. You can:
 - Create a blank email from scratch
 - Use a template set up for your organization from the list. **NOTE: Multiple emails can be created**





3. Save your plan.
4. Verify road agency. If this is incorrect, go back to Step 1, change the road agency, and click 'Save' before returning to Step 3.
5. Add comments regarding the plan. This is fed into the 'chat functionality' of Plan Share – where you can communicate back and forth about your plan to the approving road agency.
6. Click 'Submit'. The road agency will receive your plan and make a decision regarding approval.



NOTE: Once submitted, your plan will be in a “submitted” state. If you need to make changes, you can ‘cancel’ the plan application. All details you have previously entered will be saved, allowing you to make your changes and re-submit the plan.