# PlanGrid Quick Guide

TN TDOT Department of Transportation

**Engineering Production Support**

Website: https://www.tn.gov/tdot/engineering-division/engineering-production-support.html

Email: TDOT.EngineeringProductionSupport@tn.gov

# Table of Contents

# Section 1: Introduction

PlanGrid is construction productivity software that lets General Contractors, Subcontractors and owners benefit from real-time access to project plans, issues, photos, forms and more. This software can also be used in the preconstruction development of plans and documents. In technical terms PlanGrid is considered a software as a service system. Meaning each user needs their own account to access the projects that are stored in PlanGrid. A project that's set up in PlanGrid lives in the cloud, not on any one person's computer. This makes it so that everyone is looking at the same documents at once. In other words, a project manager only needs to push a set of planner visions to the cloud one time and then everyone that views that project will see those latest revisions.

### Creating and using a project template

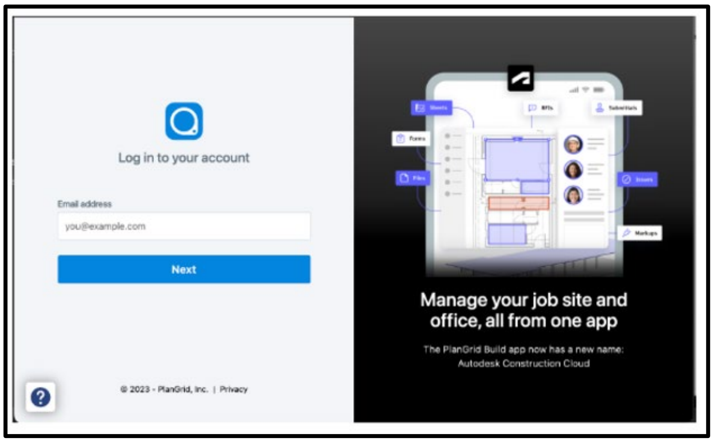
PlanGrid does not have a built-in project template feature. There is a need to have a standard project organization that users do not have to rebuild from scratch every time they create a new project. This is especially true in the context of a company having a lot of projects where the overhead of tailoring a PlanGrid project would use all the surveillance fees for the job. The way to simulate a project template is by **cloning** an existing project. Your template should be named the same way you want all your projects to be named. Use this opportunity to help ensure consistency in project naming. This becomes important when you have a lot of projects. This feature allows the user to select what to copy over. Our suggested workflow is to copy Team, Field Report Templates and Custom Stamps. See Cloning Instructions on Section 4: Creating a Project Duplicate (Cloning a Project).

# Section 2: Getting Started PlanGrid

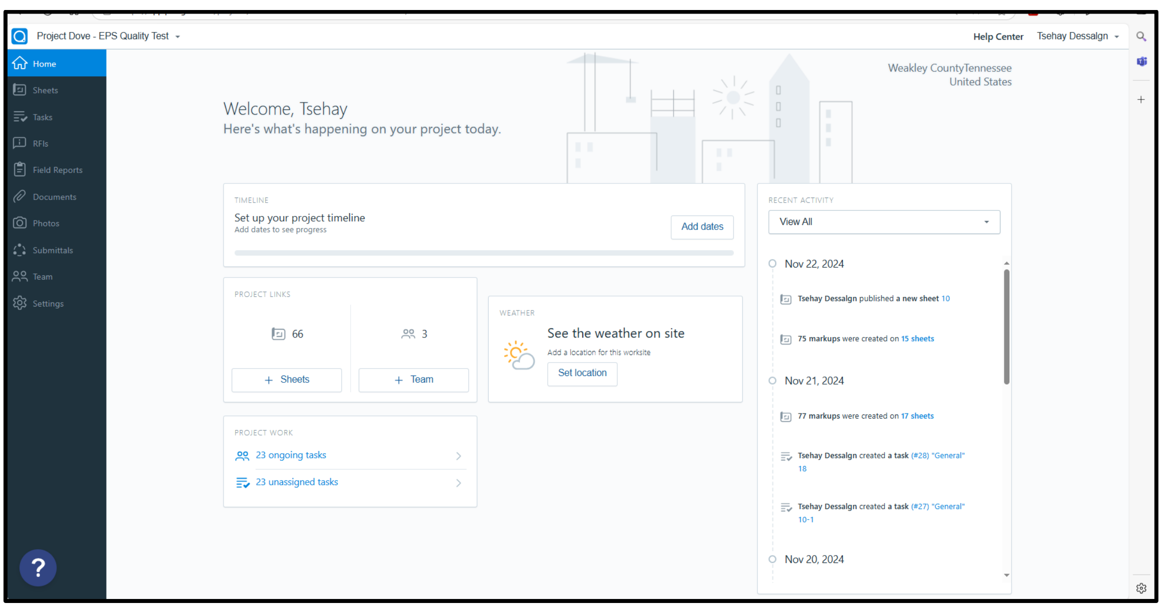
## Logging in on the website

To create your new project and to upload sheets, you will need to be logged into the PlanGrid website at [app.plangrid.com](app.plangrid.com)

Once you're created an account, you can log in and entering your email address and + password.




After you are logged-in you will be directed to the **Home Screen**. This page looks at different information about the project. It will help you make sure that your team is up to date.

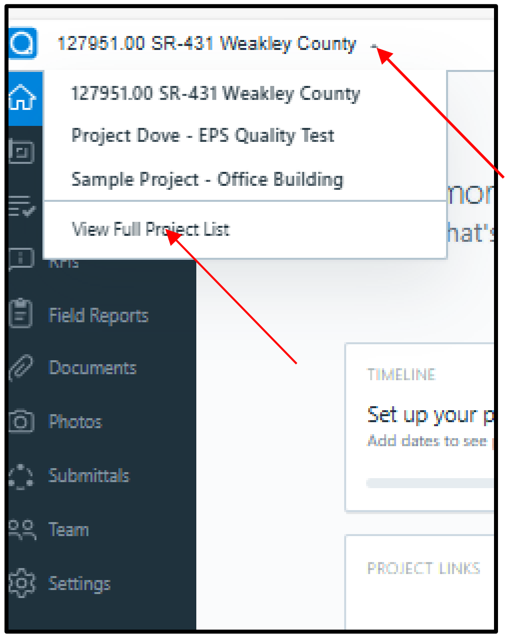


# Section 3: Creating a new project in PlanGrid

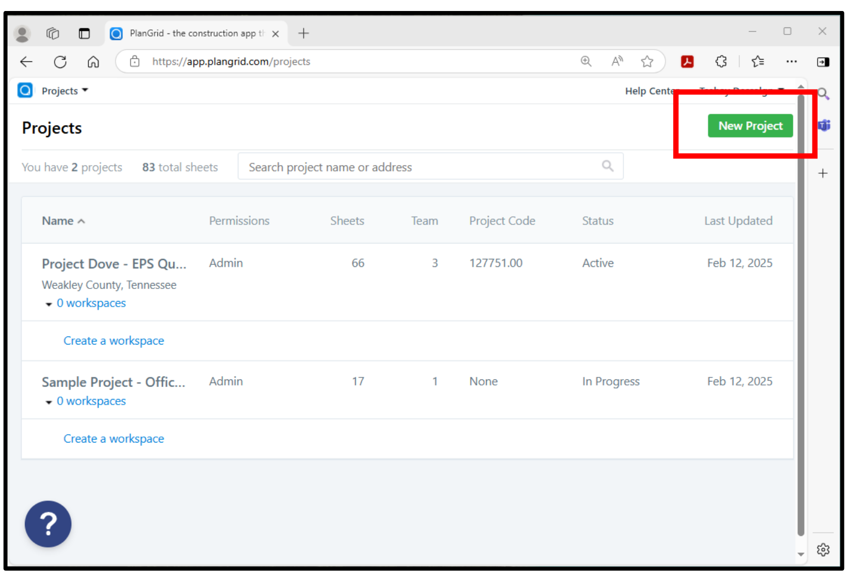
## 3.1 Create a new project

Complete the following steps to create a new project.

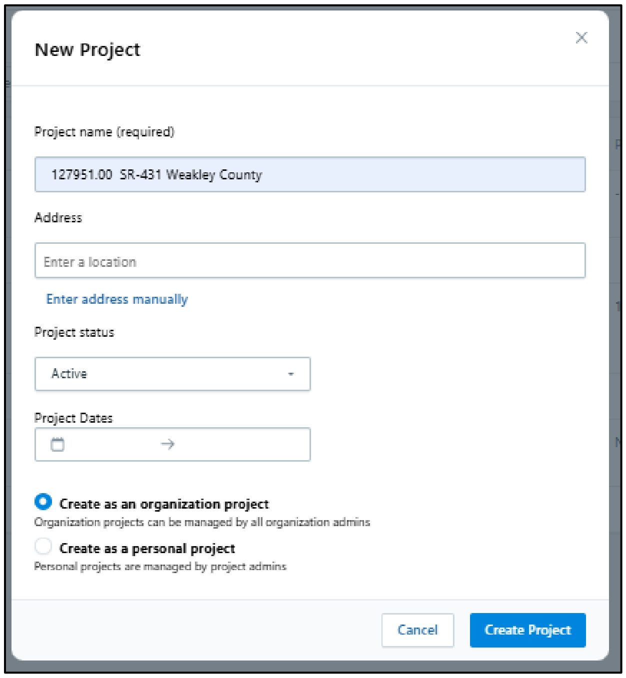
1. Log-in to PlanGrid (after you log-in you will be taken to the project Home page. From the list, select **View Full Project List,** then you will see all projects that you have either created or been invited to.



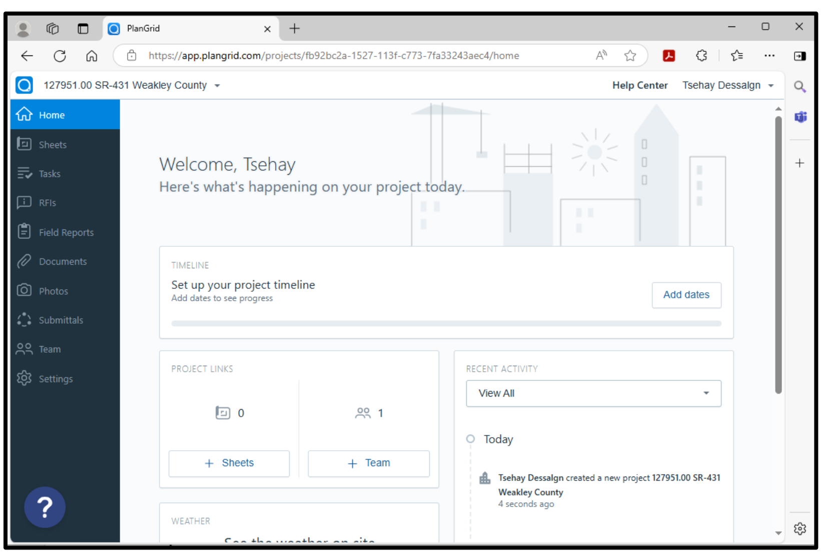

2. Click **New Project** located on the top right of the window



3. Enter the **Project Name** (see PlanGrid Start-up Request).
4. Select **appropriate status** under Project Status
5. Enter the **Project Dates** (see PlanGrid Start-up Request)
6. Select **Project Type**
   **Organization** – projects managed by all organization admins
   **Personal** – projects managed by project admins
7. Click **Create Project**

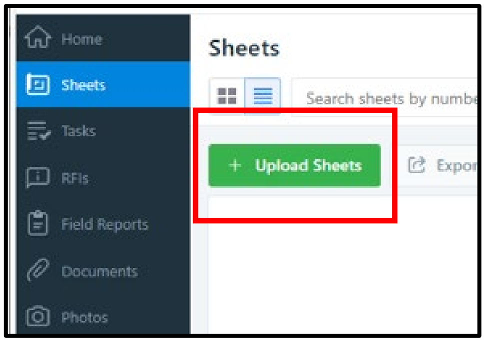


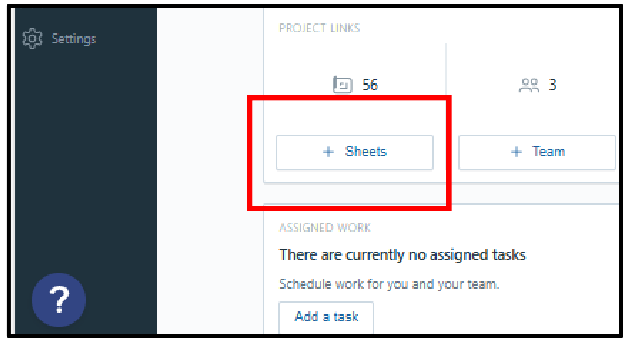

Once your project has been created, you'll be taken to the home page, where you can get started.



## 3.2 Uploading Plan Sheets

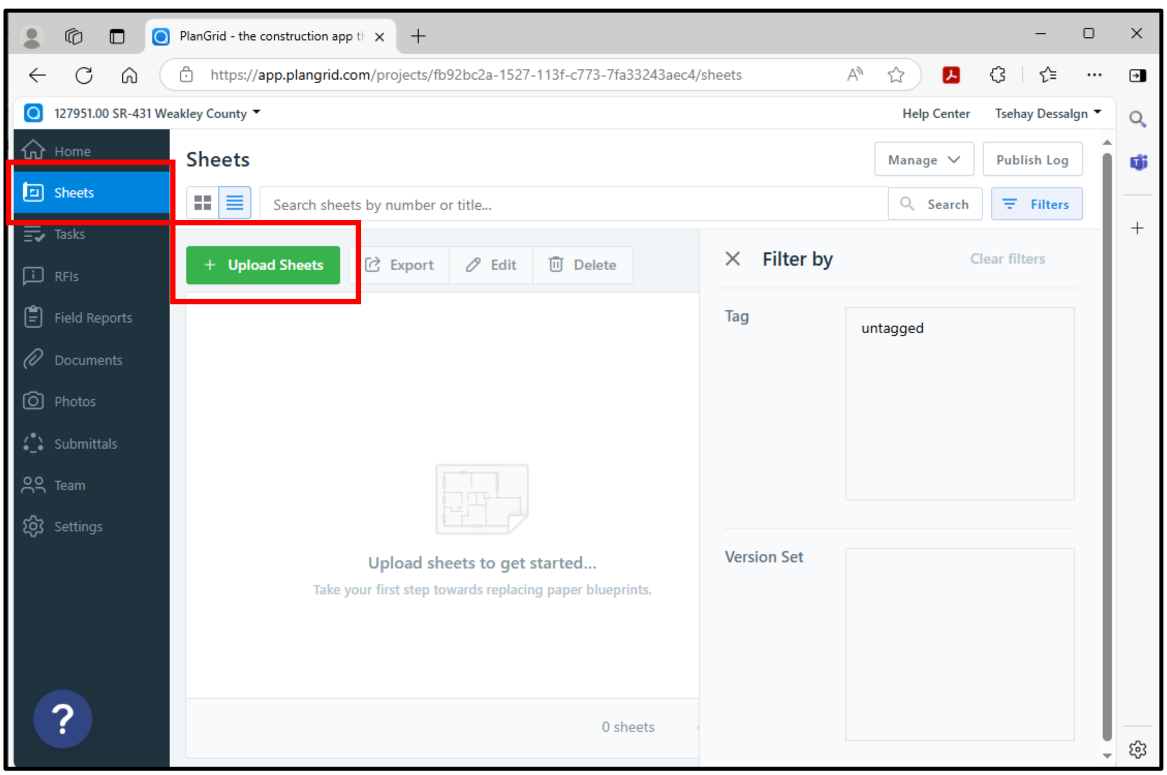
Navigate to the homepage of your project and click **Add sheets** by either navigating into the Sheets tab and clicking **Upload Sheets** or by using the quick **+ Sheets box** on the project home page.



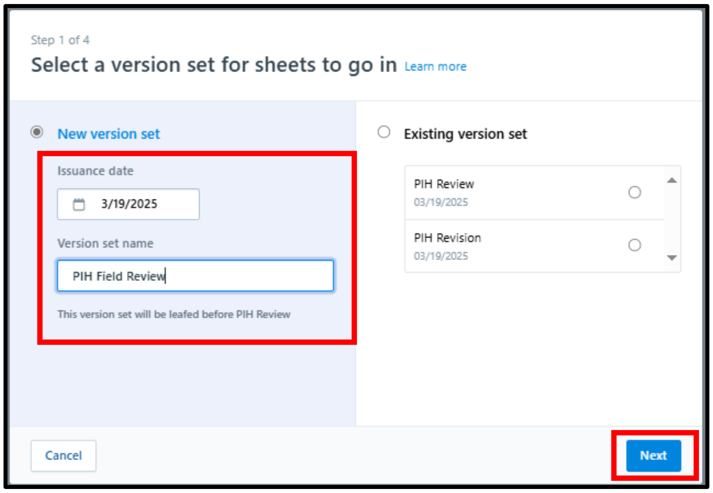




Complete the following steps to upload plan sheets in PlanGrid.

1. Click **Sheets**
2. Click **Upload Sheets**



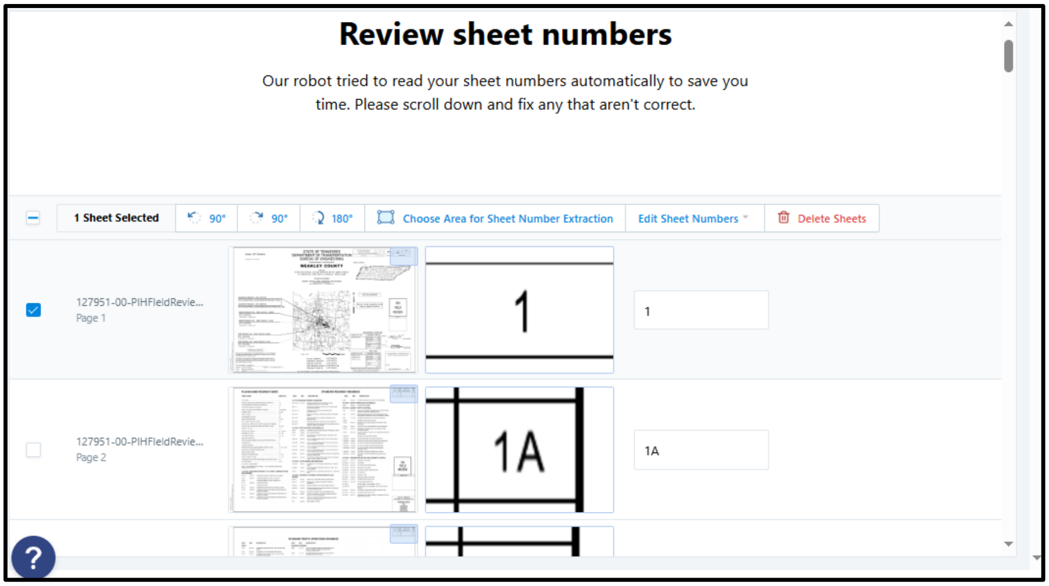

3. Enter **Issuance Date**
4. Enter **Version Set Name**
5. Click **Next**




6. Upload PDF files from your computer

**Note:** It can take a couple of minutes to process your sheets, but you'll receive an email once they're done.


7. Click **Next**




8. Make sure pages are properly named and titled.

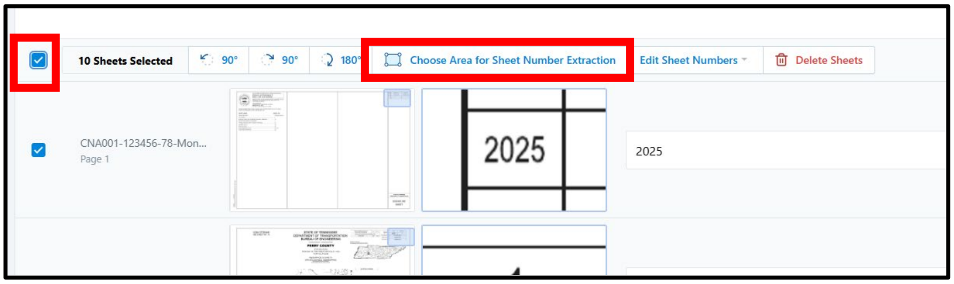
Review sheet numbers

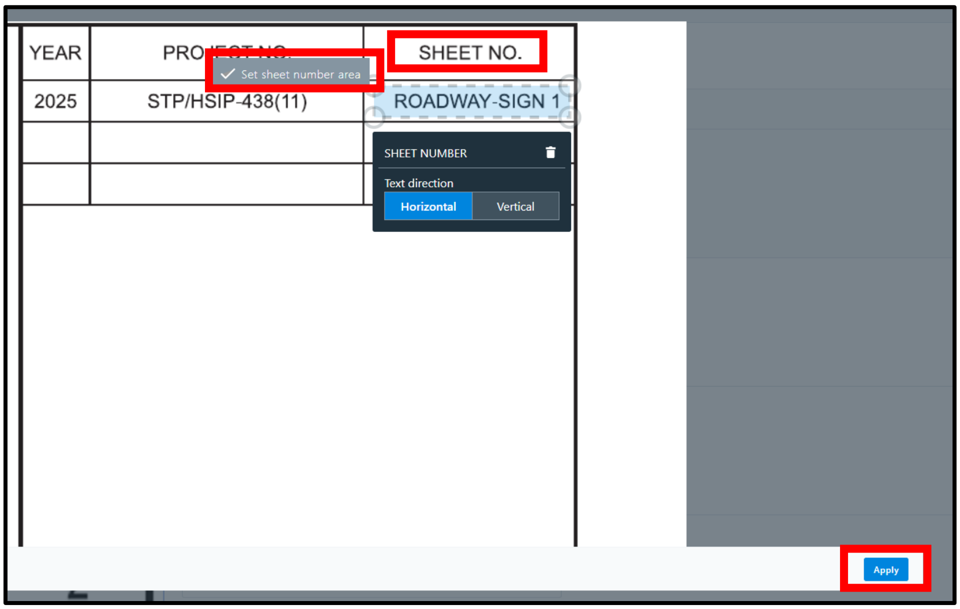
- PlanGrid automatically labels your sheets based on the numbering in your original documents. However, it's best to review the numbering to ensure that everything is accurate.
- PlanGrid will show a thumbnail image of the sheet, along with the sheet number scanned from your original PDF. Check that the numbering in the Sheet Number column matches the numbering on your original files.

9. If **ROADWAY SIGN 1** sheets included in the set, follow the next step

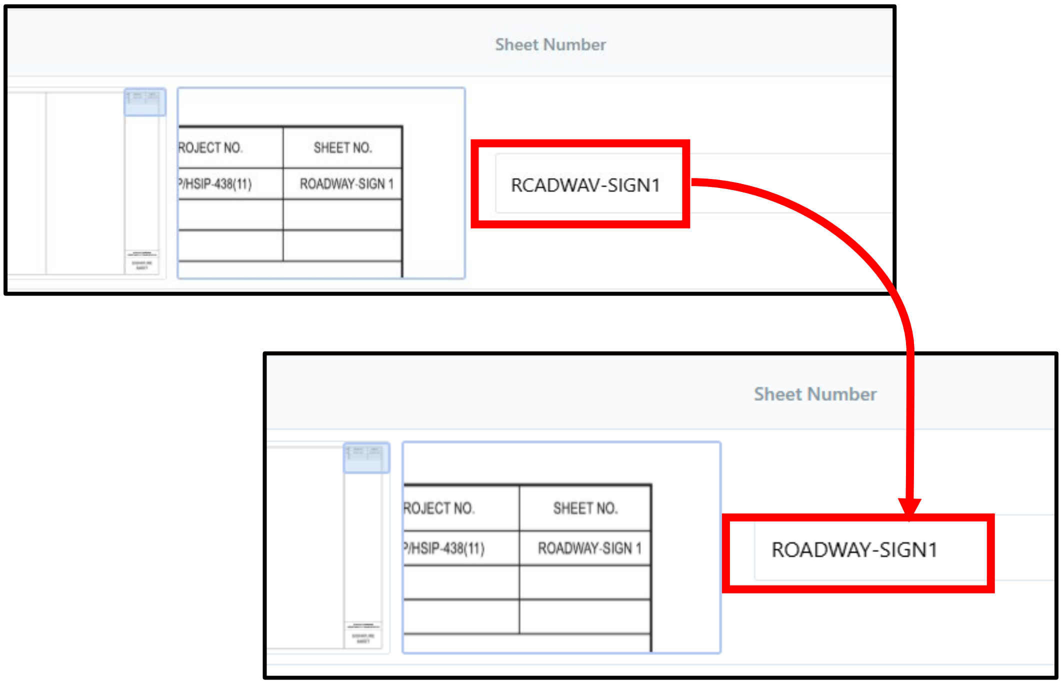
The next step is to number the sheets. PlanGrid will automatically attempt to read the contents of the sheet, locate the title block and extract this information for you. The sheet listing should be scrolled through to ensure it is reading the sheets and numbering them correctly. In any instance where the sheets are not automatically numbered correctly, you have the following options

(a) Choose to have the system re-read all the sheets but in a location that you specifically designate it to look. To do this, select the "all check" box in the top left, then select the *Choose Area for Sheet Number Extraction* button. A pop-up will appear for you to designate the area on the sheet the application to pull the sheet number from. Once selected, click the *Apply* button. PlanGrid will then re-attempt to name all the sheets in the same designated area for each sheet as indicated by the user



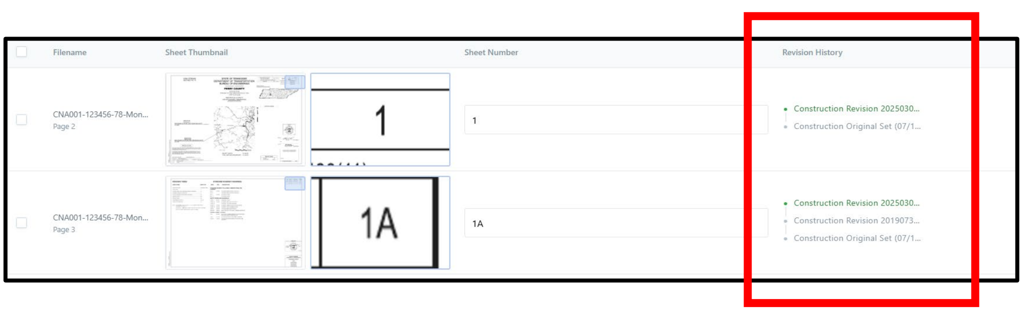




(b) Choose to have the system re-read a specific sheet(s) but in a location you designate it to look at. To do this, follow the same steps mentioned in the previous option but with only the desired sheets selected instead of all sheets.
(c) Manually name the sheets with errors. Users can do this by clicking in the *Sheet Number* field and numbering the sheet as appropriate.

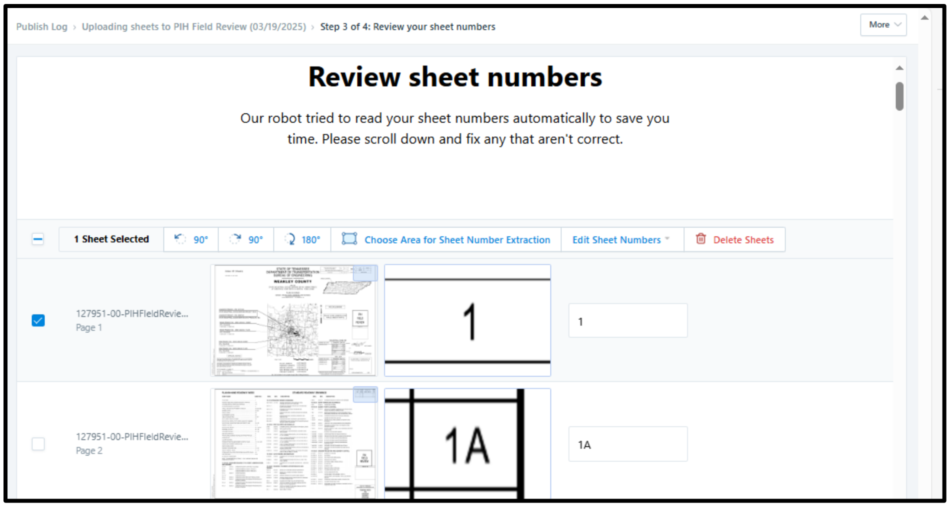


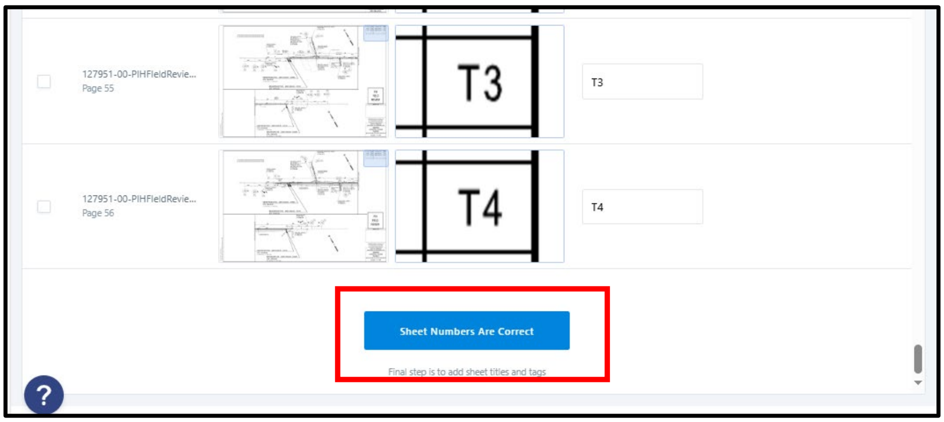

In each of these scenarios, the sheet numbers should be reviewed after corrections are performed by the user to ensure sheet numbering is correct.

If the plans being uploaded are a revised set of plans, once the sheet numbering is correct, a revision history will populate on the right-hand side of the screen. This can be used as an additional form of check to ensure the sheet name is correct (if it were a revised sheet, the user would know a revision history should appear).



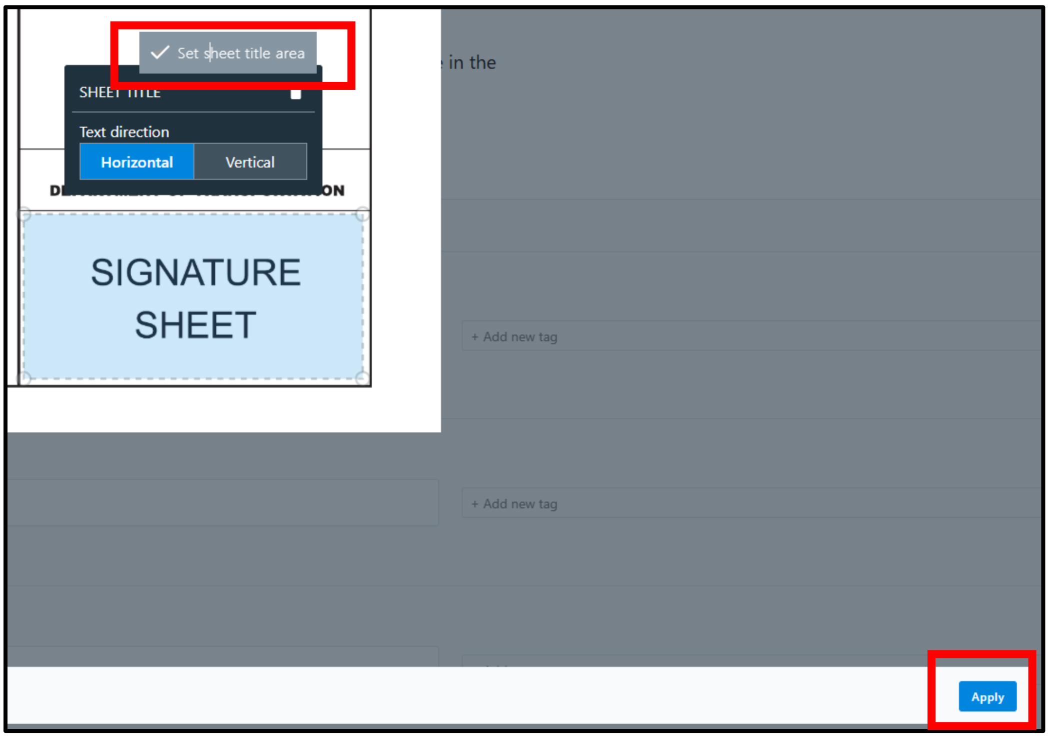

10. When sheet numbering is completed, scroll to the bottom of the sheet listing and click the **Sheet Numbers Are Correct** button to advance to the next step.




11. Add sheet Titles

To add the sheet titles for each page of the plan set. If the sheet is a revised sheet, it will automatically populate the sheet name with the name entered for that sheet when the previous version was uploaded. For all new sheets, select the sheets as applicable then select the Choose Area for Sheet Title Extraction button. A pop-up will appear for you to designate where on the sheet you which the application to pull the sheet title from. Once selected, click the Apply button. PlanGrid will then attempt to name all the sheets in the same designated are for each sheet as indicated by the user


The sheet listing should be scrolled through to ensure PlanGrid has read the sheets and named them correctly. In any instance where the sheets are not automatically named correctly, you have the following options….

(a) Choose to have the system re-read all the sheets again in a location that you specifically designate it to look. To do this, follow the above steps with all sheets selected.
(b) Choose to have the system re-read a specific sheet(s) but in a new location you designate it to look at. To do this, follow the same steps mentioned in the previous above but with only the desired sheets selected.

(c) Manually name the sheets with errors. Users can do this by clicking in the Sheet Name field and naming the sheet as appropriate.

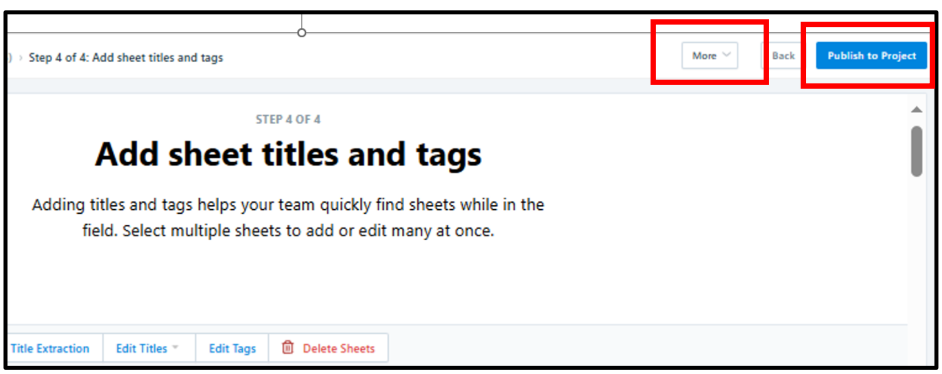
In each of these scenarios, the sheet names should be reviewed after corrections are performed by the user to ensure sheet naming is correct.

Also on this page is an option to add sheet tags. Tags are filters a user can use when looking at the full list of sheets on a given project, and can be used for various things such as denoting/grouping utility sheets, structures sheets, SWPPP sheets, cross section sheets, proposed layout sheets, existing layout sheets, etc. If this is used, a field user would be able to click in the filters section to select the appropriate tag, and PlanGrid would automatically filter down to those applicable sheets. **Users are NOT REQUIRED to add any sheet tags**, this is only if desired by the user to add them. There are no standard tags or tag naming convention to be used.

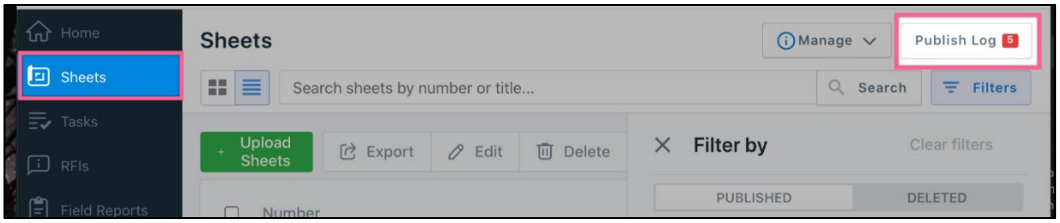
When all sheet names are correct, select the Publish to Project button in the top right corner of the screen.

12. Publish to projects

After making sure your sheets have been uploaded with the correct numbers, titles, and tags, you can click **Publish to Project** or click on the **More** button for the option to delete sheets or save and exit the project.



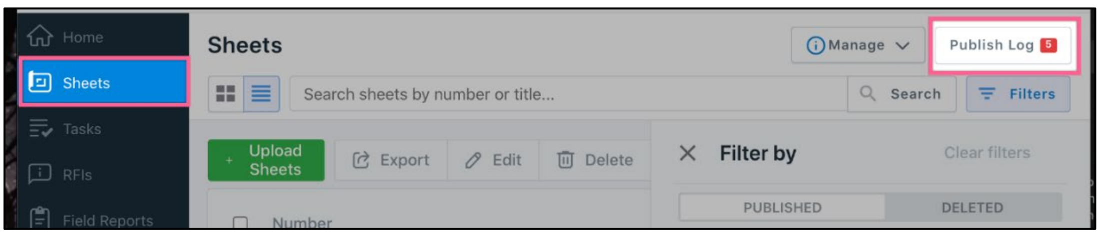

If you leave the Publish stage at any time, you can navigate back to the sheets to publish them by going to the sheets page and selecting **Publish Log** on the top right.



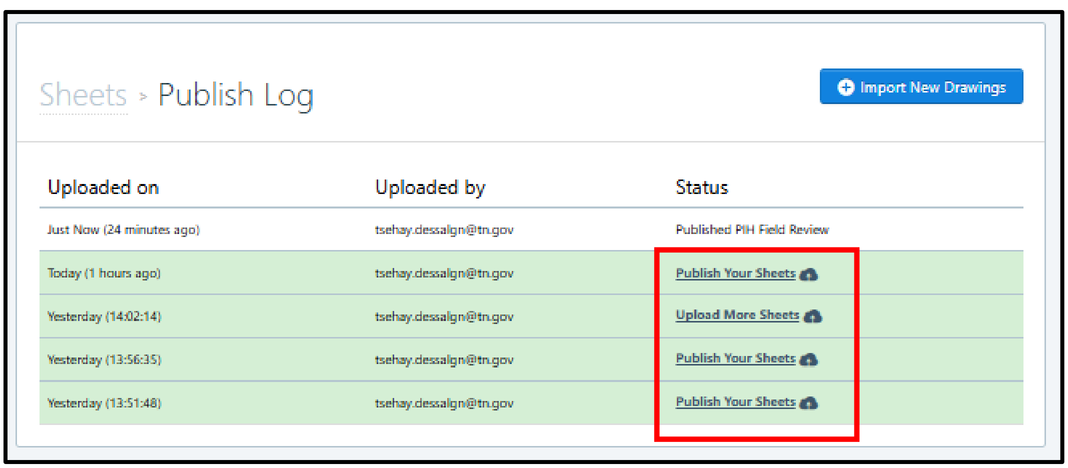

## 3.3 Removing Unpublished Uploads

If you've uploaded a set of sheets, and did not publish them, you may see a number indicated on your Publish Log at the top right of the Sheets tab. If you no longer need them, please follow the steps below on how to delete it.

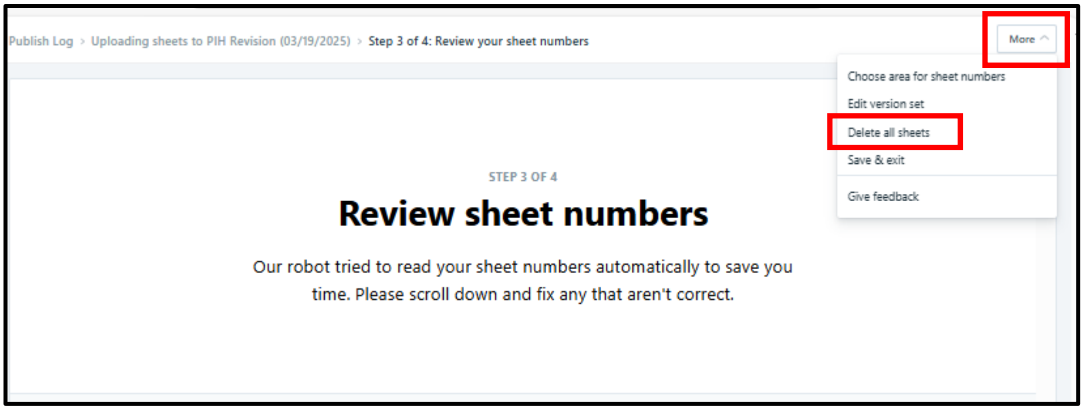
1. In the Sheets tab, click on the **publish log** on the upper right.



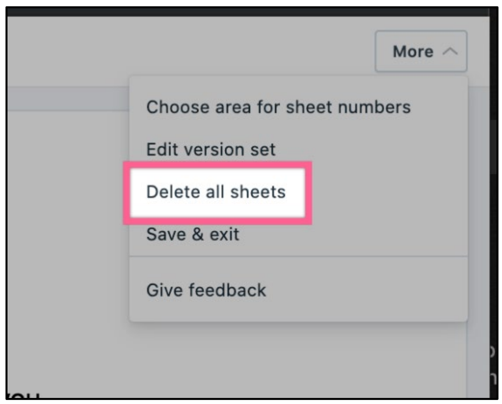

2. The row of the unpublished upload should be in green. Please click on the link that says **Publish Your Sheets** (this will just take you back to the publishing stages of that batch)

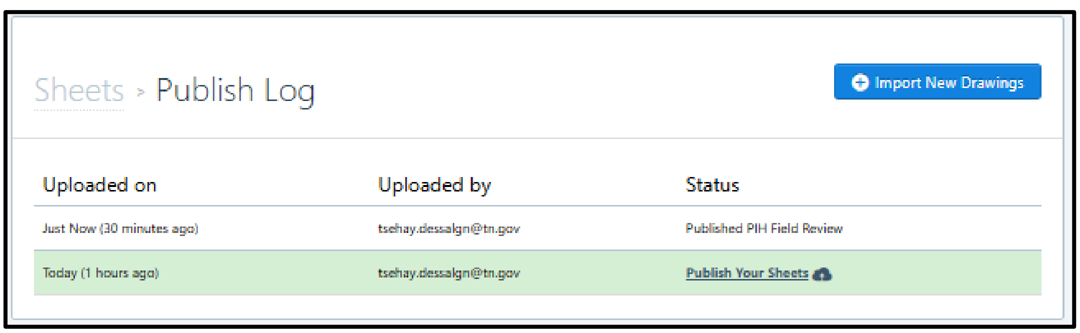


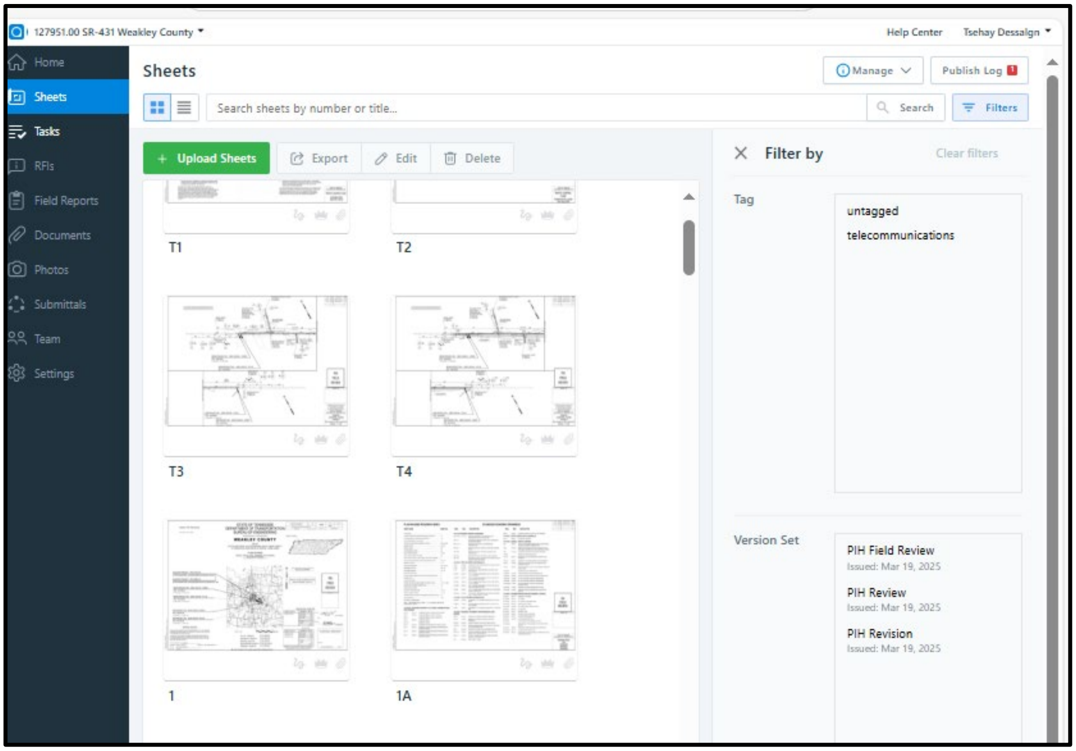

3. Click on **More** on the upper right.




4. Click on **Delete All Sheets.** This will only delete that specific upload batch; furthermore, the row of that upload will disappear from the publish log.






## 3.4 Reordering Sheets after Publishing

Once your sheets have been uploaded to the project, you can manage their sort order. PlanGrid will automatically define a prefix order based on the order of the sheets uploaded. Sheet ordering relies on discipline prefixes in your sheet numbers. Disciplines represent the **first alphabetical characters of a sheet number (or the number zero)**. **Admins can add/remove/edit disciplines in the "Manage > Sheet Order" section of the Sheets tab**.

On upload of new sheets to a ***new* project,** PlanGrid will automatically define a prefix order based on the *order of the sheets uploaded*. Project admins can then navigate to the management page to refine or adjust the ordering before choosing to save and apply.

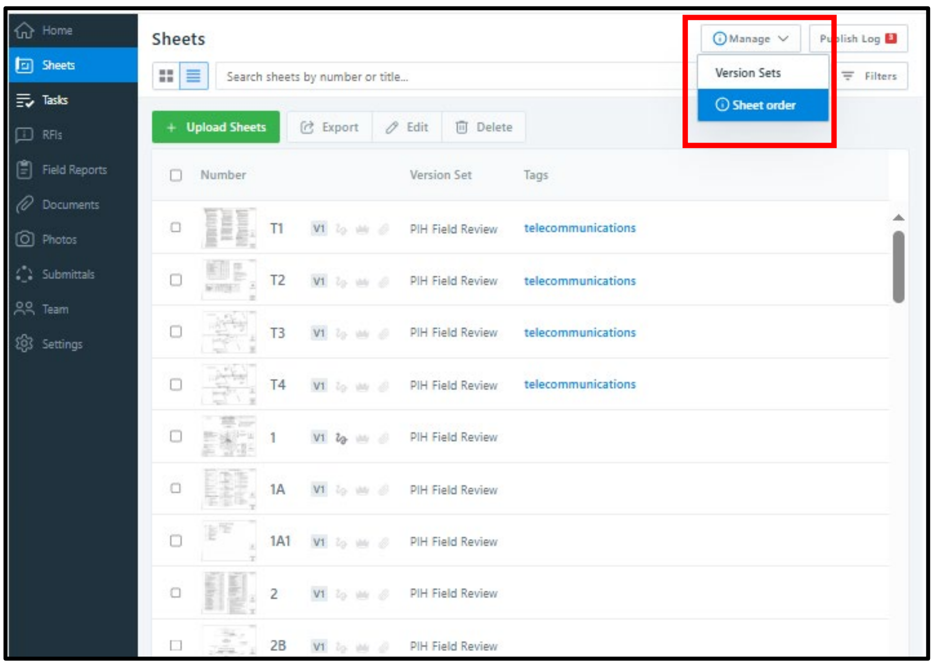
PlanGrid sheet ordering relies on discipline prefixes in your sheet numbers. Disciplines represent the first alphabetical characters of a sheet number (or the number zero, which is currently the only numerical character that can be defined as a discipline). Project admins will create their preferred discipline prefixes (based on their sheet numbers) and define the ordering of these disciplines in the sheet order management page on web.

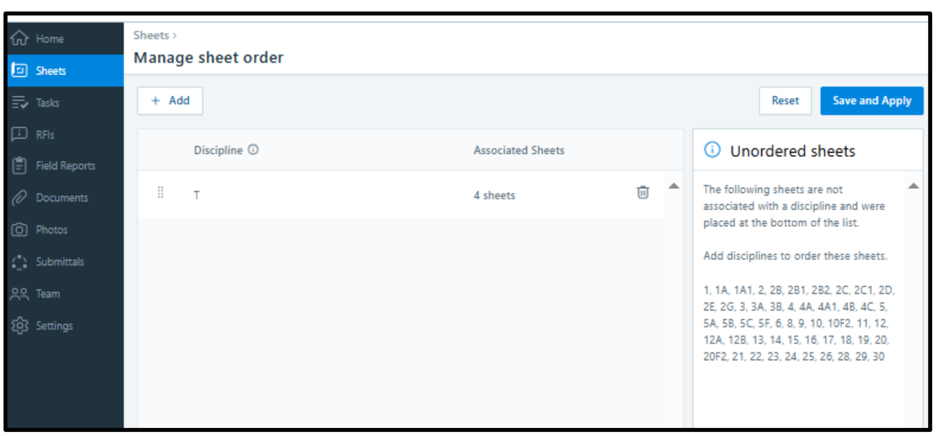
Project administrators will see a **Manage** dropdown list, where they can choose to either navigate to the **version sets** management page, or the **sheet order** management page.

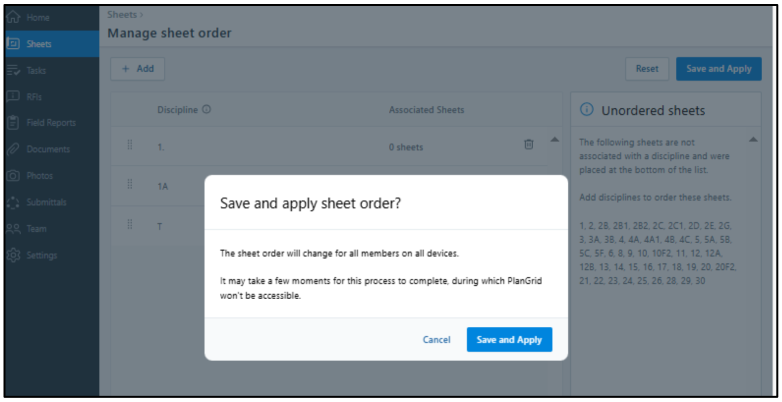
On upload of new sheets to a new project, PlanGrid will automatically define a prefix order based on the order of the sheets uploaded. Project admins can then navigate to the **management page** to refine or adjust the ordering before choosing to save and apply.

For existing projects, the admin can go into the **Mange > Sheet order** to see the suggested order then save and apply that or rearrange/add/remove disciplines before choosing to save and apply to re-order the sheets.

Any sheets that do not have a prefix will move to the bottom of the sorted list, and be defaulted back to an alpha-numeric sort order. When you are in the “manage > sheet order” section, there will be an indication showing that sheets are not part of an existing discipline. Sheets that do not start with a letter prefix or the number zero cannot be ordered.

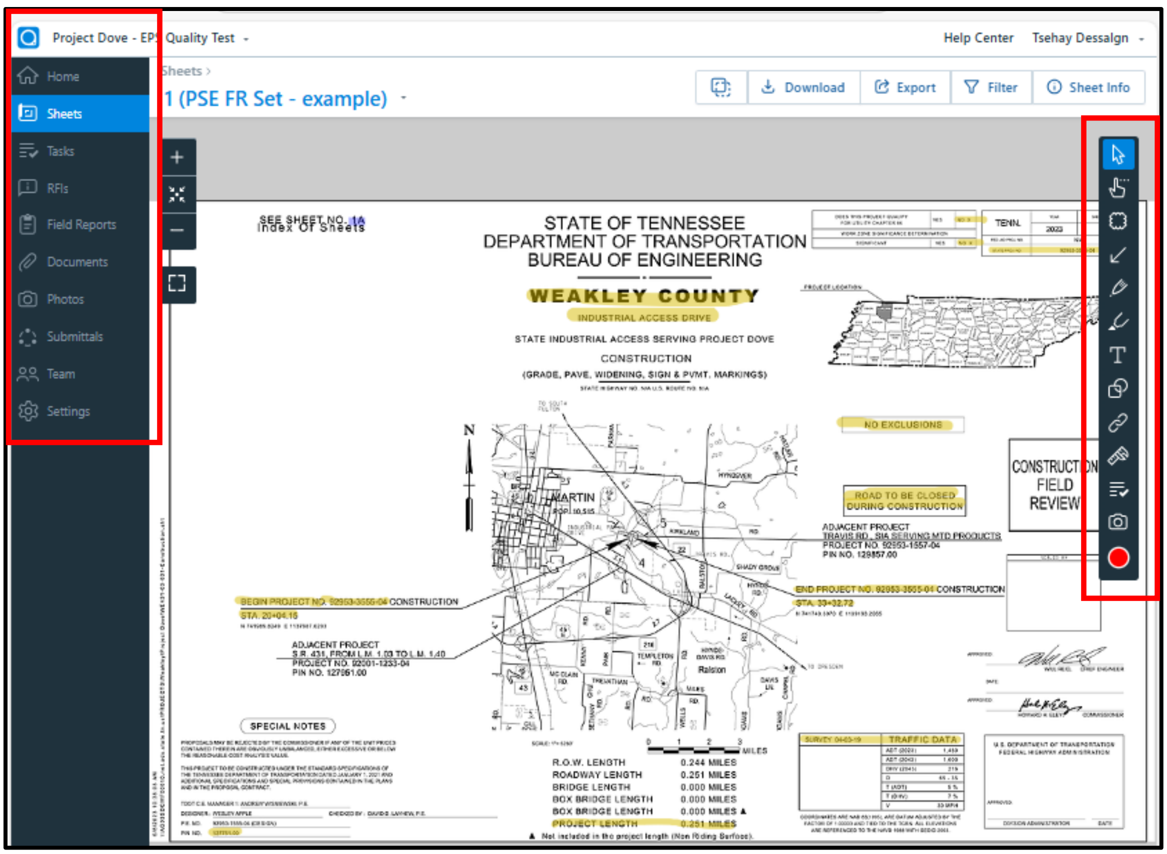





## 3.5 The Navigation Toolbar

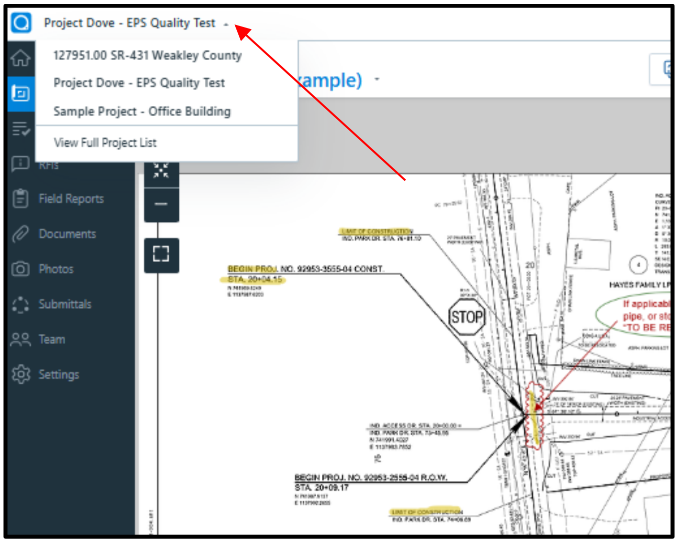
Once you access a project, use the icons to navigate around the website and access all your project information. You can hover over each icon to see the title.



## 3.6 Switching Between Projects

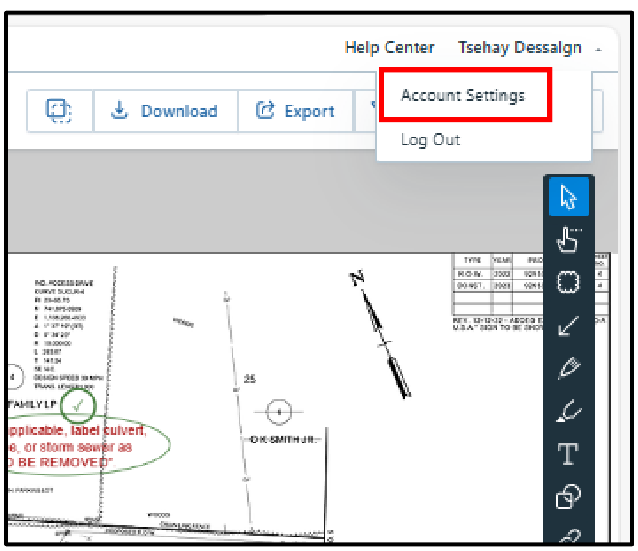
1. If you are already viewing a project and would like to switch to another project, tap on the project name in the upper lefthand corner.

2. Then select the project you would like to view.




## 3.7 Accessing Your Account Settings Page

To get into your account page, click on your name in the upper right corner and then select ‘Account Settings’.




From the account setting page, you can:

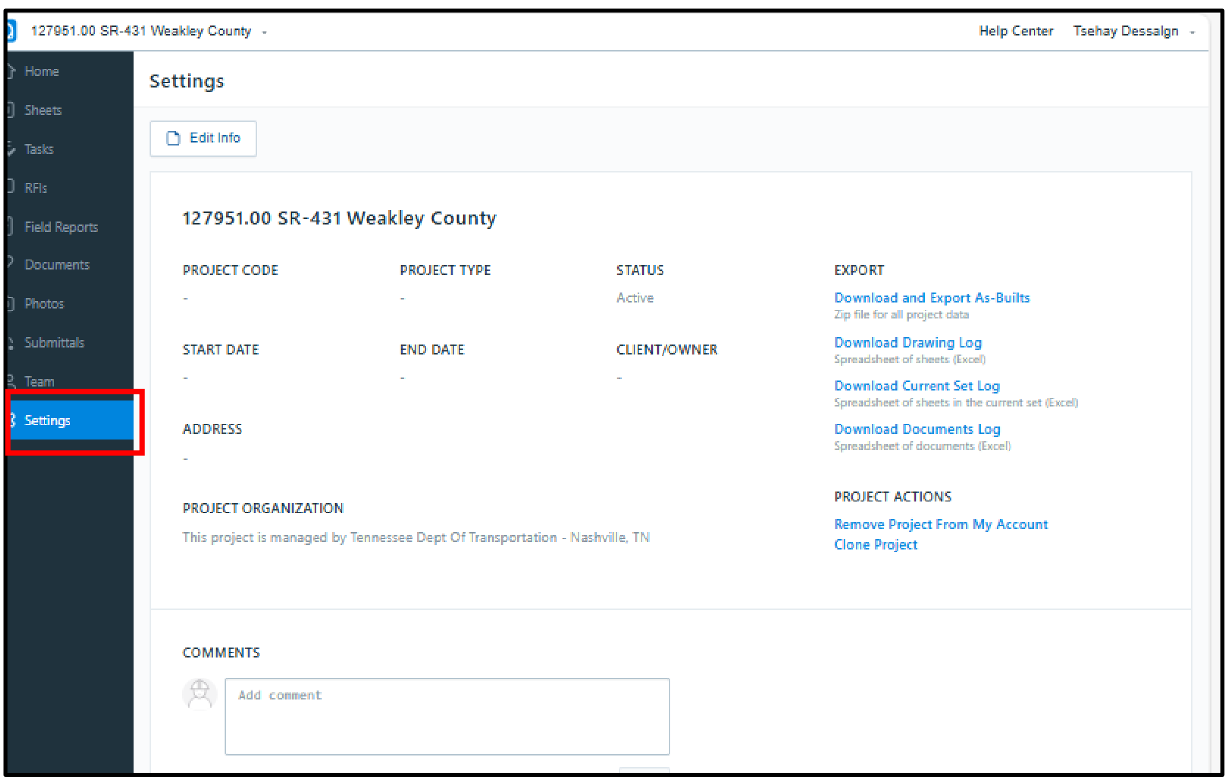
- Change your name as it appears in PlanGrid
- Change the email address you use to log in and receive notifications, and how often you get them.
- Upgrade your account or cancel your web subscription
- Change your associated company name, which shows on your card under the Team icon
- Change your contact phone number
- Change your password
- Delete your account

## 3.8 Project Settings

Inside the project settings you can add comments, change a project name, delete or remove a project, clone a project, and generate and download as-builts, drawing and documents log.

### 3.8.1 To Get to the Project Settings:

1. Click on the **project.**
2. Click on the **settings tab** on the navigation menu.



### 3.8.2 Project Profile

Under the project profile, you can add or edit:

- The **Project Name**
- Add a Project **Code**
- Select the **Project Type** from a dropdown list of options.
- Add the **project Status**
- Enter the **Client/Owner information**
- Enter the **project Start Date**
- Enter the **End Date** if the project is done
- Add the **address**, which you can type and select from the map addresses that appear, or to manually type the address.

Any team member can access the Project Profile, but **only Admins** can Edit the information. To do so, click on the **Edit info** button.

### 3.8.3 Comments

To add comments, click into the field to begin editing, and click ‘Post’ to post the comment for the whole team to view

### 3.8.4 Project Actions

You can remove a project from your account or delete a project permanently for all users under project actions. **Only administrators** in a project will see the option to permanently delete. Projects that are linked to an organization can only be permanently deleted by an organization administrator; the option will not appear for project administrators who are not also organization level administrators.

**Please Note:** The **‘Permanently Delete’** option deletes this project for all users on the project team, and you will have no way to restore this project.

### 3.8.5 Export

**As-builts, Drawing and Current Set Log,** and **Documents log** all give you a way to export project information to your computer.


**As-builts:** feature allows you to export your drawings, documents, and photos from PlanGrid to your computer or cloud storage.

**Drawing and Current Set and Documents Log:** will export as a CSV file for use in any spreadsheet program and will include essential information about the project documents.

# Section 4: Creating a Project Duplicate (Cloning a Project)

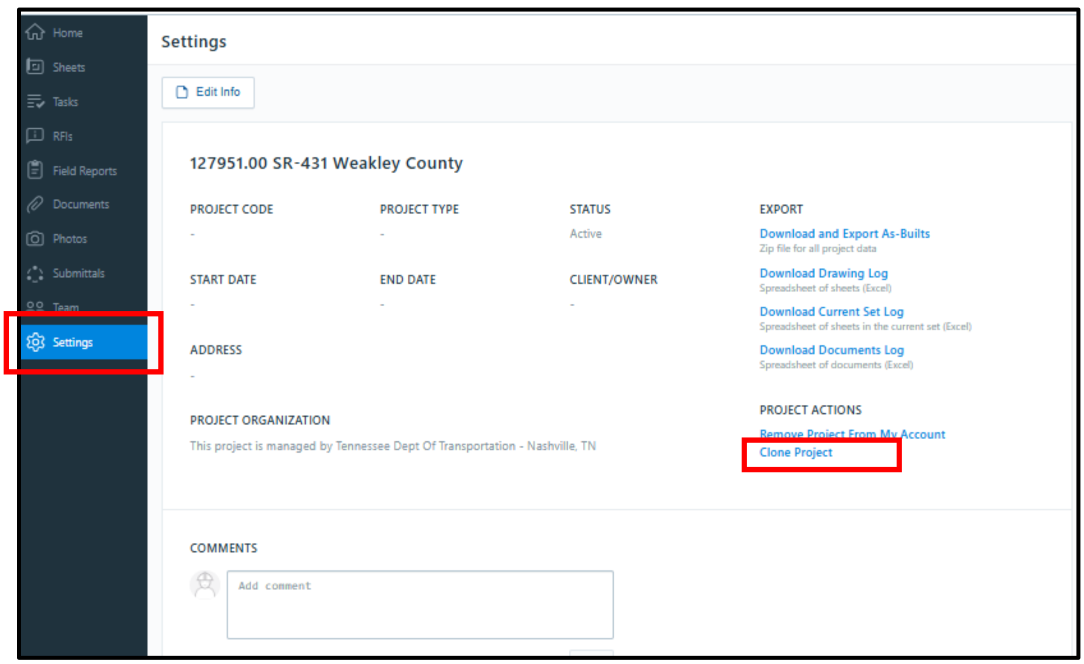
PlanGrid offers the ability to duplicate, or clone, your project. That provides you the ability to make a copy of the current project for your own personal use, or to use a current project as a template for future projects. You can duplicate your sheets (including versions, tags, and automatic hyperlinks), documents, field report types (templates), project team, task lists and any customized issue stamps or RFI statuses.

Projects can only be cloned **at plangrid.com**, and only by **project administrators.**

Please be aware that once a copy is complete, it is fully independent of the original project, meaning that when one is updated the other will not reflect those changes.

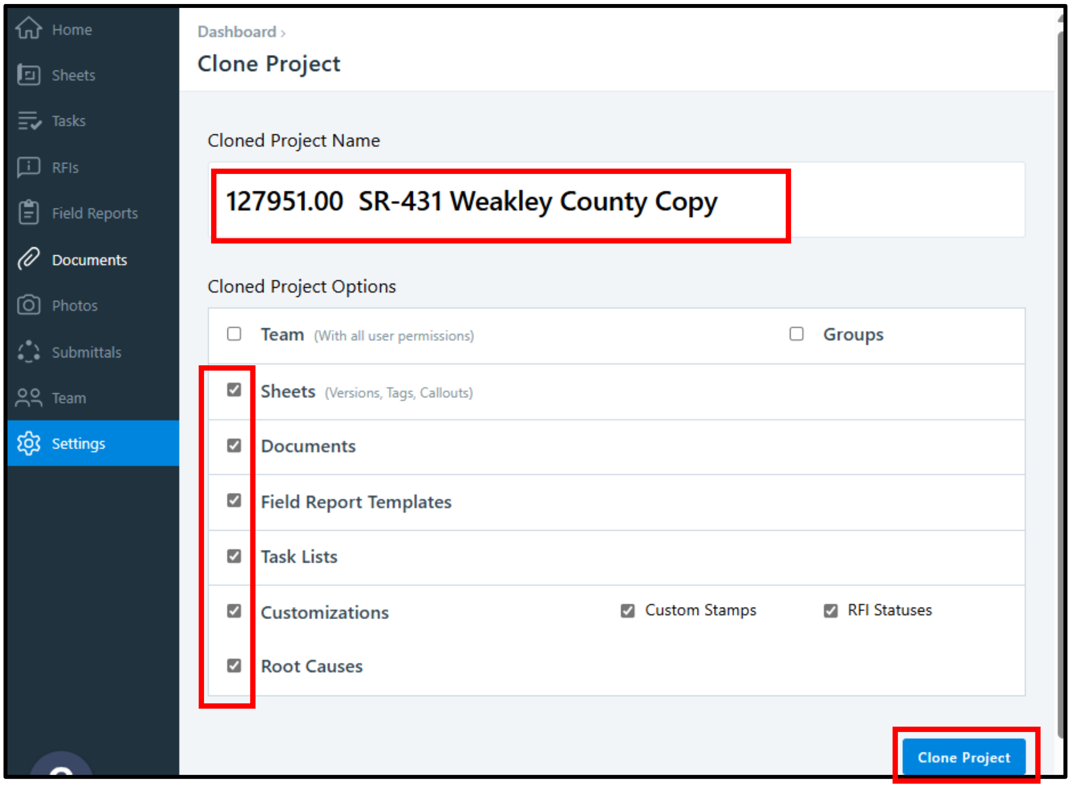
## 4.1 To create a project duplicate or clone:

1. Open your project at plangrid.com and click into the project **Settings**.
2. Under Project Actions choose **Clone Project.**



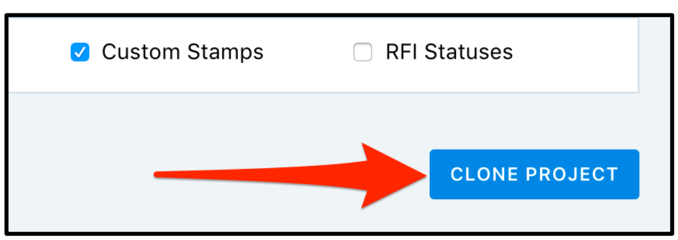

3. Next, select the information you would like to include in your copy, and edit the project's title if necessary.

**Note**: Recommend check every box to be copied **EXCEPT** for the Team and Groups because the project only needs the project specific staff.




When including customizations, check the box next to **Customizations** first, and then **un-check** anything you do not want to include.


4. When your selections have been made, select **Clone Project** button.




5. PlanGrid will notify the user **via email** and the project will be available in their project listing when the cloning process is completed. You can navigate to your full project list by selecting the project name in the top left corner, and in that dropdown selecting *View Full Project List*.

# Section 5: Managing Your Project Team

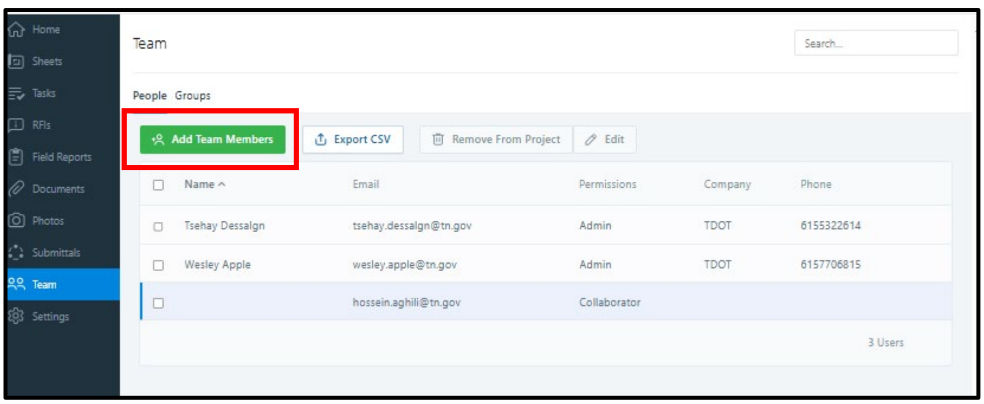
## 5.1 Sharing my project with other users

To share your project with other PlanGrid users, you'll need to add them to your project team. Team members can only be invited by a project Admin and can be assigned different permission levels. See more of permission levels on [5.4 Understanding PlanGrid's Permission Levels](#).

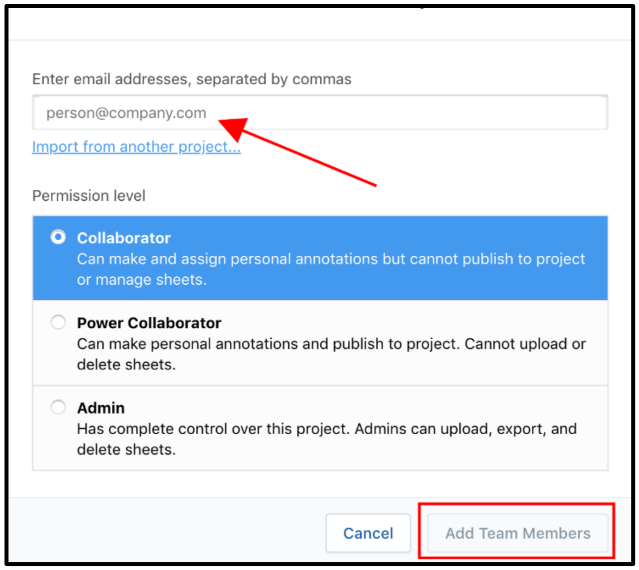
With PlanGrid, all changes to the published project—published markups, RFI postings, Documents, and Sheet revisions—will automatically sync to all team members on that project.

## 5.2 Adding team members on the website

1. Login at [app.plangrid.com](app.plangrid.com) and open the project you want to share.
2. Click on the **Team** icon
3. Click on the **Add Team Members** button




4. Enter the email address of the user you want to add and select their permission level
5. Click **Add Team Members**



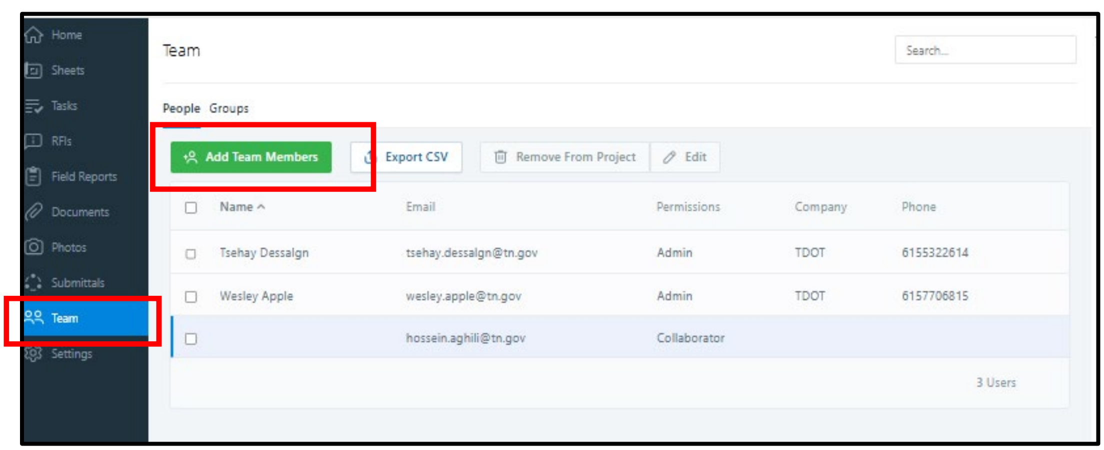

When you invite a team member on Windows, they'll be added as a collaborator by default. For instructions on how to change permission levels, See more of permission levels on 5.4 Understanding PlanGrid's Permission Levels.

## 5.3 Importing Team Members from Other Projects

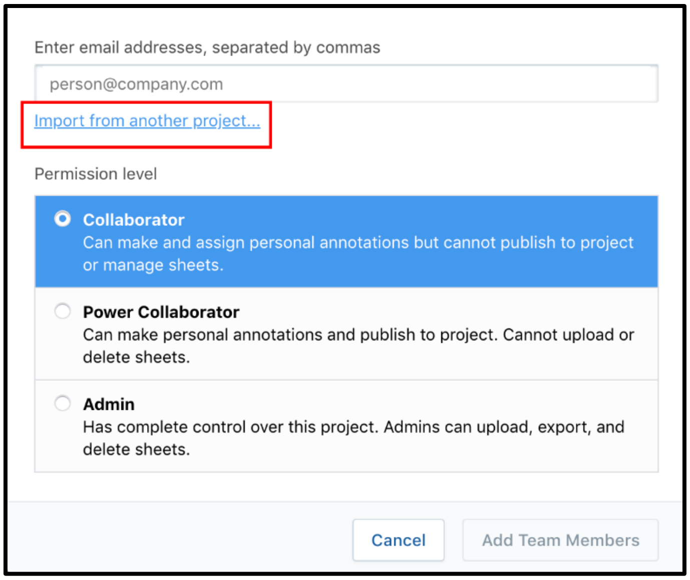
**Note**: use this if needed, the project only needs the project specific staff.

You can add several team members to a new project at once by importing them from another project. To begin, make sure that all the team members have been added to a different project, which will allow you to bulk import them to a new one.

1. Open the project that you'd like to share with users
2. Click on the **Team** icon and click **Add Team Members**




3. Select **Import from another project...**




4. Select the project from which you'd like to import

5. Select the members to import and click **Import,** or click **Select All**

## 5.4 Understanding PlanGrid's Permission Levels

PlanGrid has three user permission levels: **Admin**, **Power Collaborator**, and **Collaborator**. Every user has a permission level.

All team members can view and download sheets in a project, view published markups, create personal markups, and access and view all PlanGrid RFIs. In addition, all team members have access to Progress Photos and Issues by logging into the project on the website.

Permission levels are specific to each project and need to be changed within each project, even if the same user is in multiple projects.

**Admin**: Has full rights and powers within the project, can **upload** and **delete** sheets and documents, and can manage the project team, can edit any **Task,** even if the user is designated as a Watcher.

**Power Collaborator**: Can **share notes** with the team but *cannot* upload or delete drawings, project documents, or team members, can edit any **Task**, even if the user is designated as a Watcher.

**Collaborators**: ***Read-only***. Can view all sheets, documents, and published markups. Can change an issue's status when the issue is assigned to them. *Cannot* share notes with the team, add or delete sheets or documents, or edit the project team. This is the only permission level where a user cannot edit a **Task**.

**Table 1 - Permission Levels**

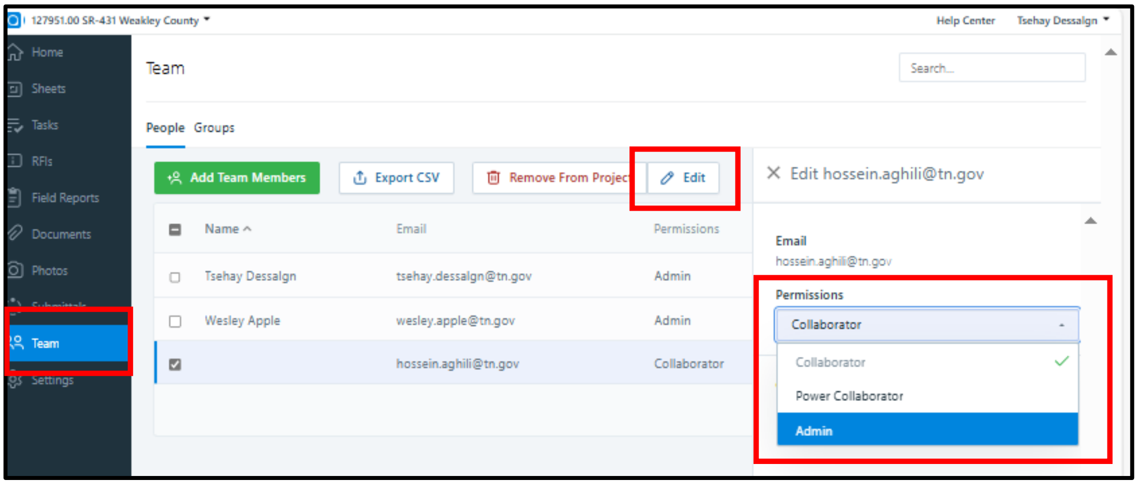
| | Tasks | Admins | Power Collaborators | Collaborators |
|---|---|---|---|---|
| 1 | Uploading Drawings | ✓ | | |
| 2 | Delete sheets | ✓ | | |
| 3 | Rename or delete projects | ✓ | Can remove themselves from projects | Can remove themselves from projects |
| 4 | Assign issues | ✓ | ✓ | ONLY issues they created |
| 5 | Change issue's status | ✓ | ✓ | -To "pending" or "In-Review" only<br>-Can only closed self-assigned punches |
| 6 | Can close assigned issues | ✓ | ✓ | |
| 7 | Create, edit, or remove custom stamps for projects-wide use | ✓ | ✓ | |
| 8 | Can archive and permanently delete published punch items | ✓ | ✓ | Only personal |
| 9 | Can create, publish, edit, and remove annotations (published or personal) | ✓ | ✓ | Only personal annotations (cannot alter or create mastered annotations) |
| 10 | Can edit sheet name, descriptions, and versions | ✓ | | |
| 11 | Add, edit, or remove project documents | ✓ | | |
| 12 | Can share published annotation layers | ✓ | | |
| 13 | Can lock and unlock RFI's | ✓ | | |
| 14 | Delete snapshots | ✓ | | |
| 15 | Delete progress photos (from sheets) | ✓ | ✓ | |

If a project is organization-linked, the project admin will only be able to delete the project if they are an organization admin as well.

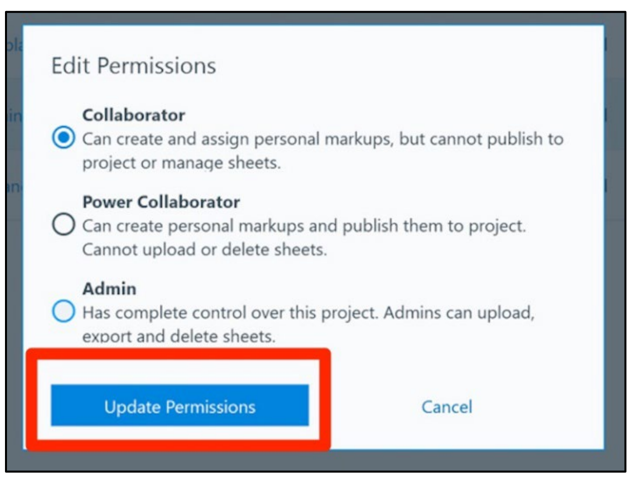
## 5.5 Managing user permission levels

A project Admin can manage permission levels and remove users from a project. To begin, open the project.

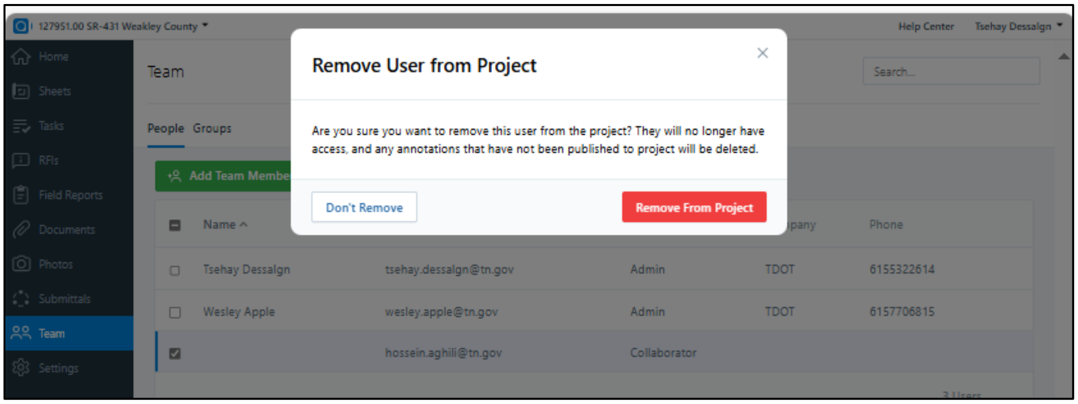
1. Check the box next to the team member you'd like to manage and click **Edit Permissions.** You can also select multiple team members and edit their permission levels at the same time.




2. Select the new permission level and click on **Update permissions.**



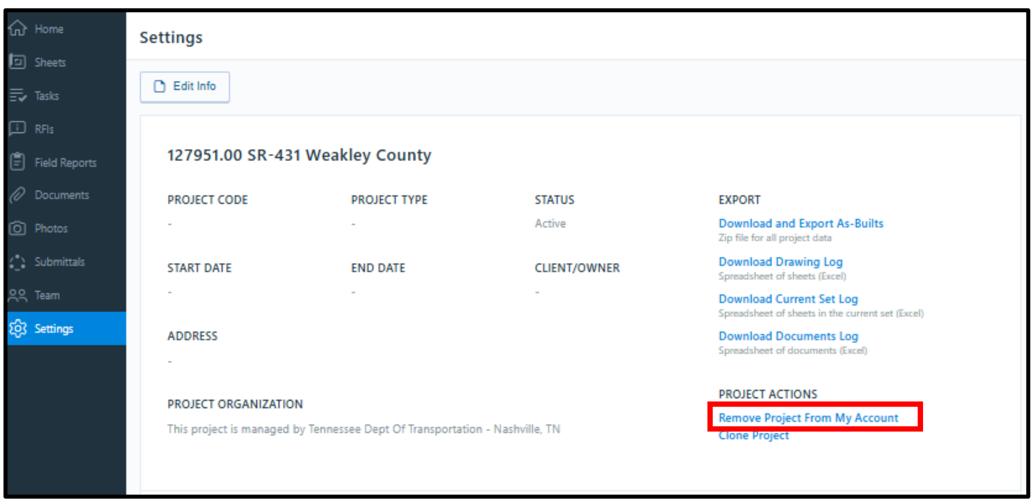

3. To remove a team member from the project, select that user from the **Team** tab and click on **Remove from Project**.




## 5.6 Remove Yourself from a Project

To free up sheet space, you can remove yourself from projects that you aren't working on or have been completed.

Open the project, then click the **Settings** icon and under **Project Actions** select **Remove Project From My Account**. Verify that you'd like to leave the project by typing **leave** in the confirmation box and then clicking **Leave.**

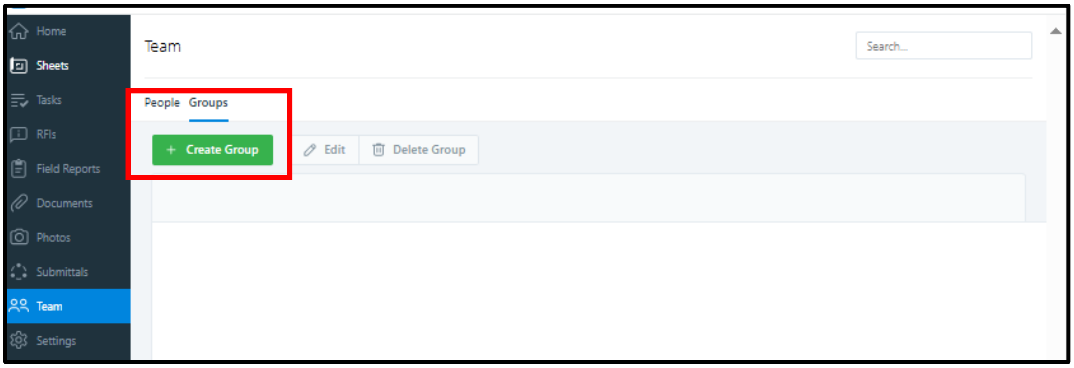



## 5.7 Creating Groups

To use Groups for Tasks or Submittals, you first need to create one or more groups from the Team page using PlanGrid for the web. Only people who are members of a project team within PlanGrid can be assigned to a group in that project.

1. Navigate to the **Team page**
2. Select **Groups**
3. Select **Create Group**

4. Enter a name for the group and click **Next**
5. Select the people you'd like to add to the group and click **Create**

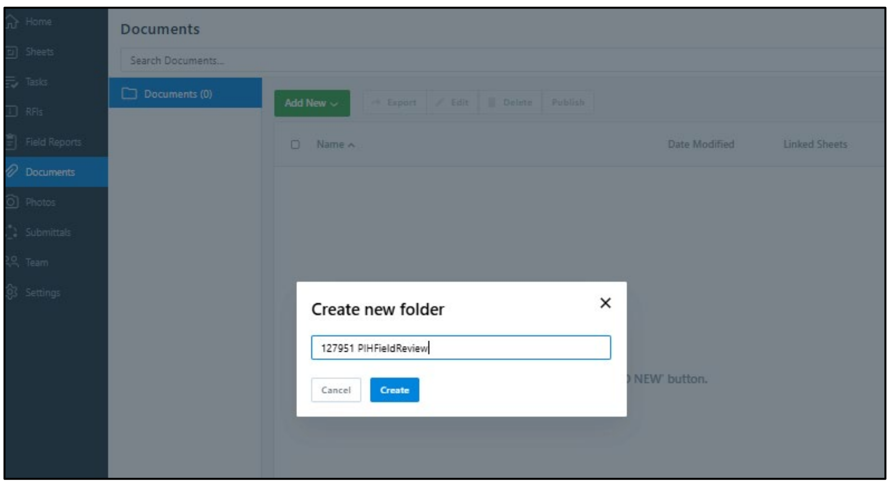


# Section 6: Creating or deleting subfolders

Keep documents organized using folders. All folders will live in the root folder "Documents," and you can add subfolders to any folder.

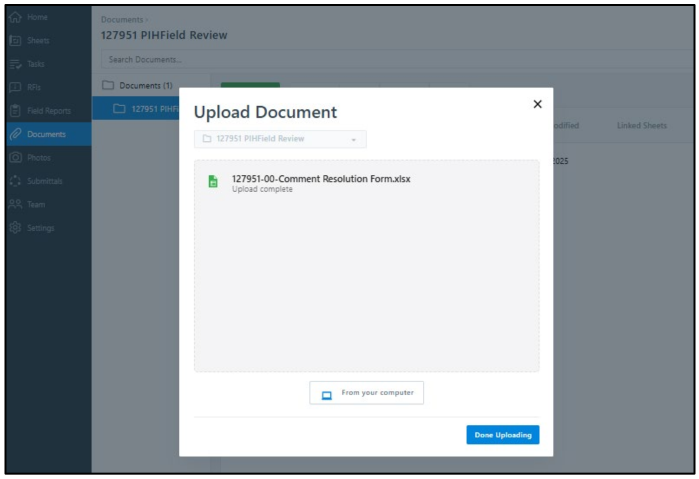
## 6.1 Creating new folder

1. Select the folder you'd like to create a subfolder for
2. Click **Add New**
3. Select **Create a new folder**
4. In the pop-up box, type the subfolder name and select **Create**



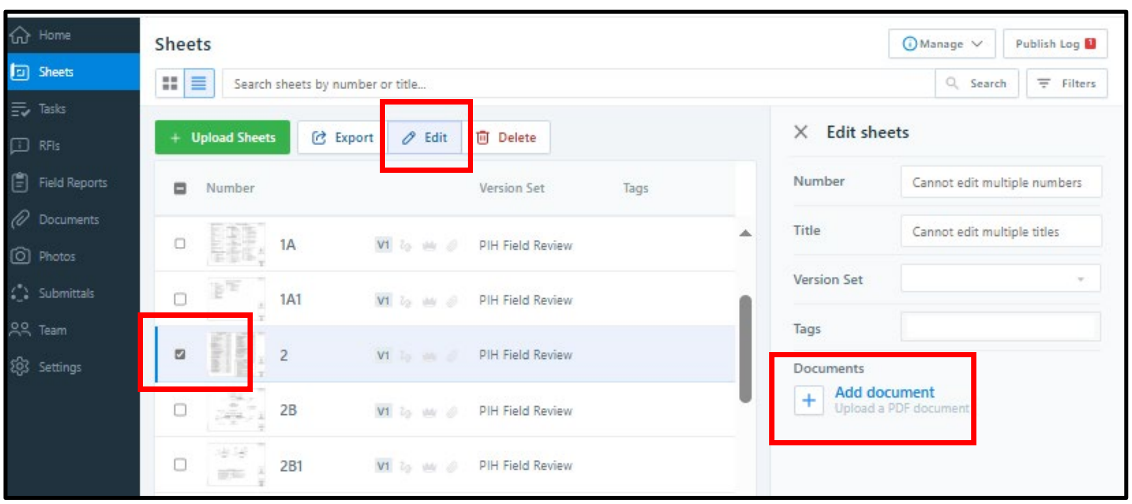

## 6.2 Uploading documents on the PlanGrid

1. Select the project that you'd like to upload documents to
2. Click on the **Documents**
3. Click **Add New**
4. Select **Upload files** from the dropdown menu
5. Choose the folder you'd like to add documents to
6. Drag your files or choose to upload from your computer




## 6.3 Upload multiple documents from the Sheets page.

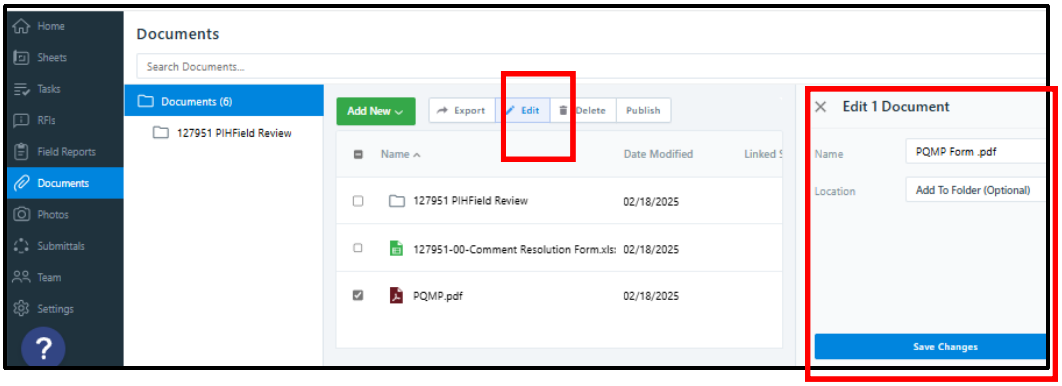
1. Select the sheets to which you'd like to add documents
2. Click **Edit** and then **Add document**
3. Choose the folder you'd like to add the file to (optional)
4. Drag your files into the box or upload them from your computer
5. Click **Done uploading**
6. Verify the file and click **Save changes**




## 6.4 Viewing, editing, and renaming documents

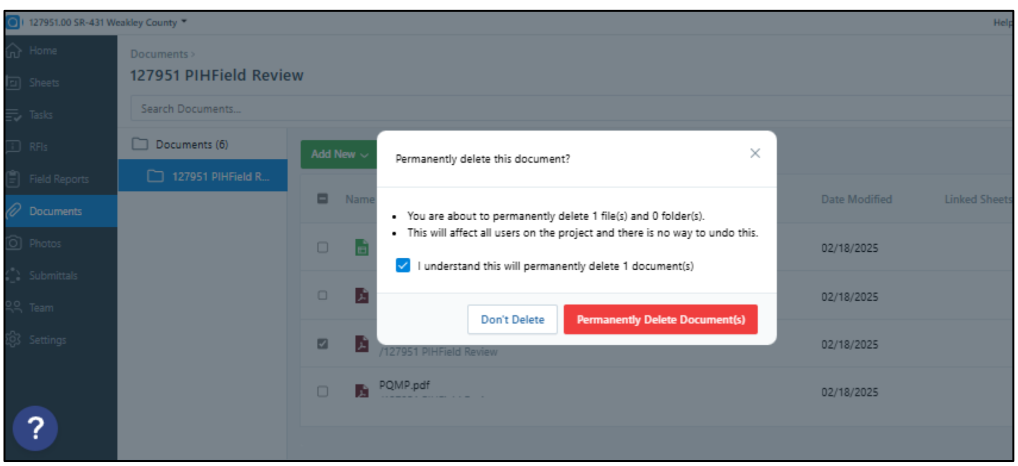
Once your documents have been uploaded, you can view, edit, or rename them from the "Documents" page.

Navigate to the folder that contains your document and select it using the checkbox next to the document name. Then click **Edit**. A side panel will appear, where you can edit the name and location of the document. To save your changes, click **Save Changes**.




## 6.5 Deleting subfolders

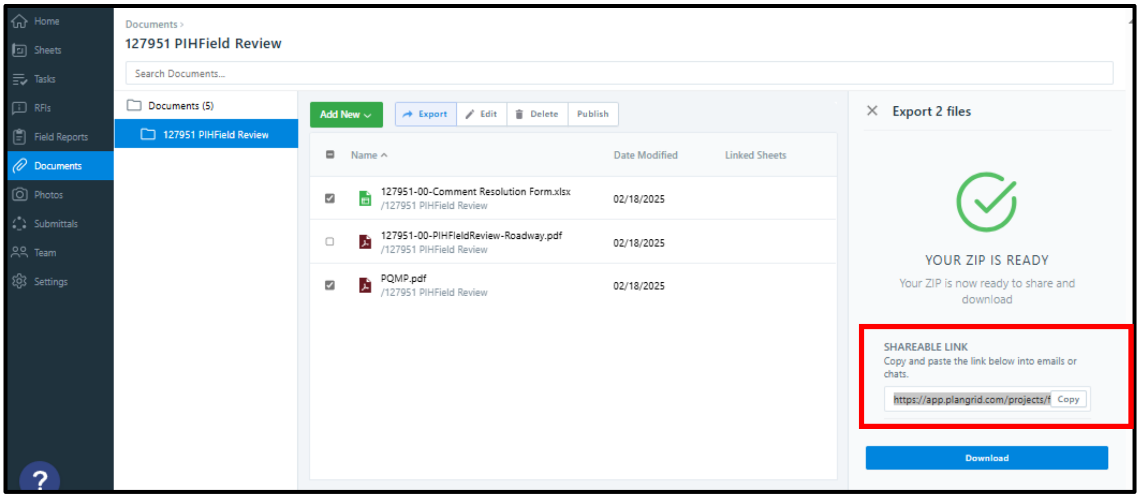
1. Select the **parent folder**
2. Click the **checkmark** next to the folder you'd like to delete to select it
3. Click **Delete**
4. Confirm that you'd like to delete the folder and press




## 6.6 Sharing your project documents

If you're an Admin or Power Collaborator on a project, you can also select multiple documents and export a link to download them.

Select the documents you want to share and then click on the **Share** button.

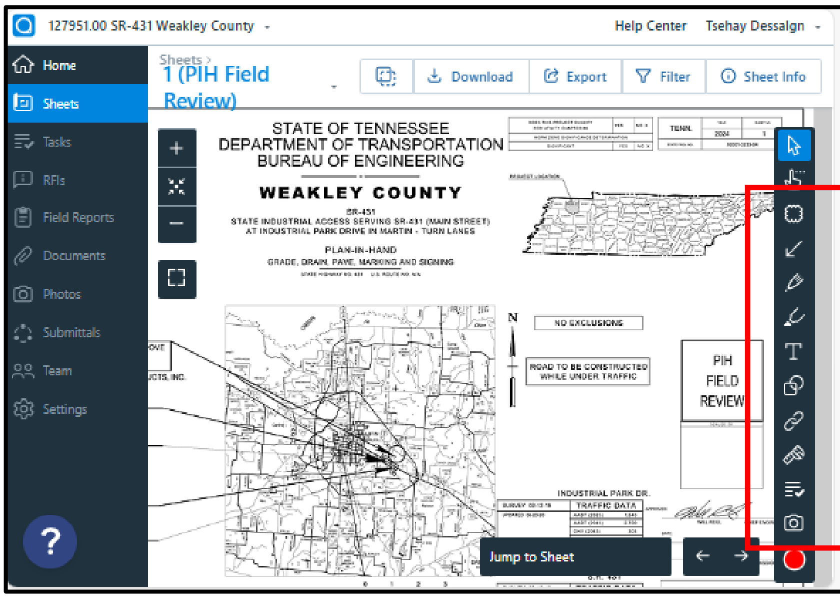

Home
Sheets
Tasks
RFIs
Field Reports
Documents
Photos
Submittals
Team
Settings
Documents ›
127951 PIHField Review
Search Documents...
Documents (5)
127951 PIHField Review
Add New
Export
Edit
Delete
Publish
Name
Date Modified
Linked Sheets
127951-00-Comment Resolution Form.xlsx
/127951 PIHField Review
02/18/2025
127951-00-PIHFieldReview-Roadway.pdf
/127951 PIHField Review
02/18/2025
PQMP.pdf
/127951 PIHField Review
02/18/2025
Export 2 files
YOUR ZIP IS READY
Your ZIP is now ready to share and download
SHAREABLE LINK
Copy and paste the link below into emails or chats.
https://app.plangrid.com/projects/
Copy
Download

# Section 7: Creating, Editing, and Sharing Markups

## 7.1 Get to Know the Markup Tools

To create markups, first open the sheet that you want to markup. When viewing a sheet, you will see your markup tool bar along the right side of the screen.

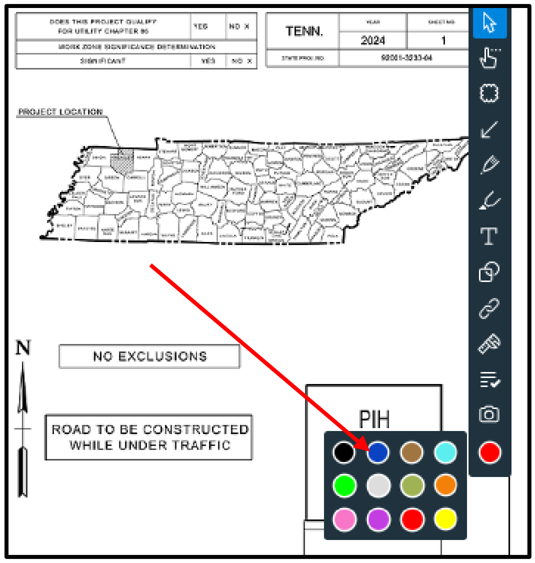
To begin creating markups on your PlanGrid for Windows, simply select the tool and place on the sheet.




- Clouds
- Arrows
- Pen Markups
- Highlighter Markups
- Text Markups
- Shapes
- Task stamps
- Manual Hyperlinks
- Measurements
- Photo Markups

## 7.2 Adding Mark Ups to Your Sheets

1. Click the sheet you want to markup from your sheets.
2. From this view, you can use any of the markup tools. Select the preferred color, and then select the markup you want to place.

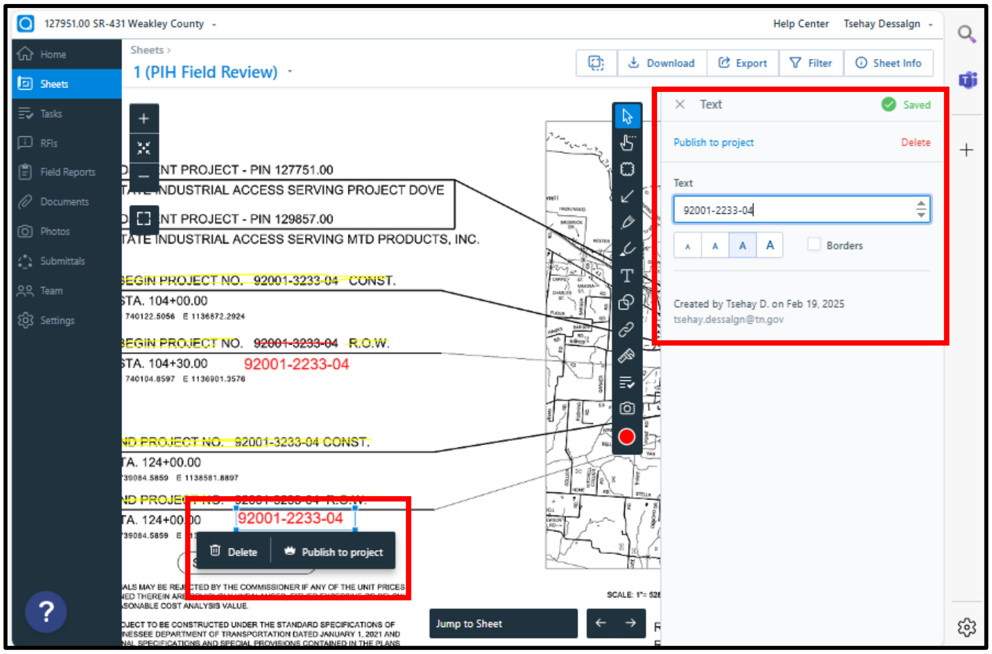



3. Next, simply click or tap and drag to create it.

## 7.3 Creating and Editing Text Markups

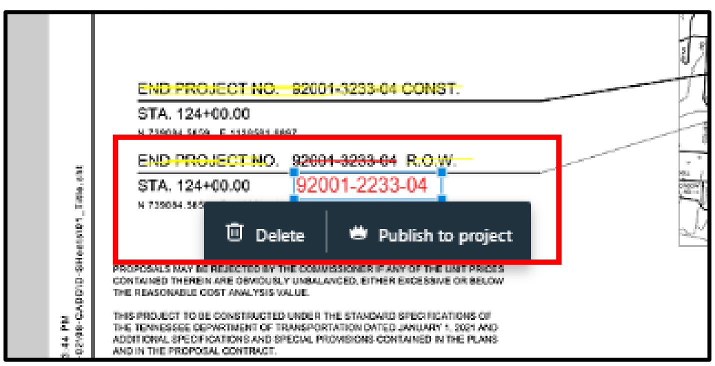
**Text:**

1. Select the **Text tool** from the toolbar.
2. Drag and drop the text box in the required location on the sheet.
3. The side bar will appear and will allow you to edit the Text and provide different Text Box Attributes.
4. Here you can edit the text itself, the text size, and add or remove a border:
5. To edit an existing text box, click the text markup to open the Action Bar. The "Edit" button will select automatically and open the markup's detail panel on the right-hand side. Edit the text markup as required.



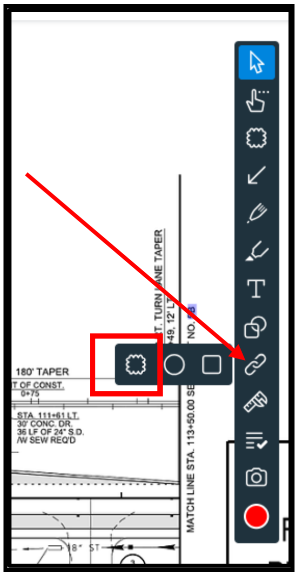

## 7.4 To Edit and Delete Markups

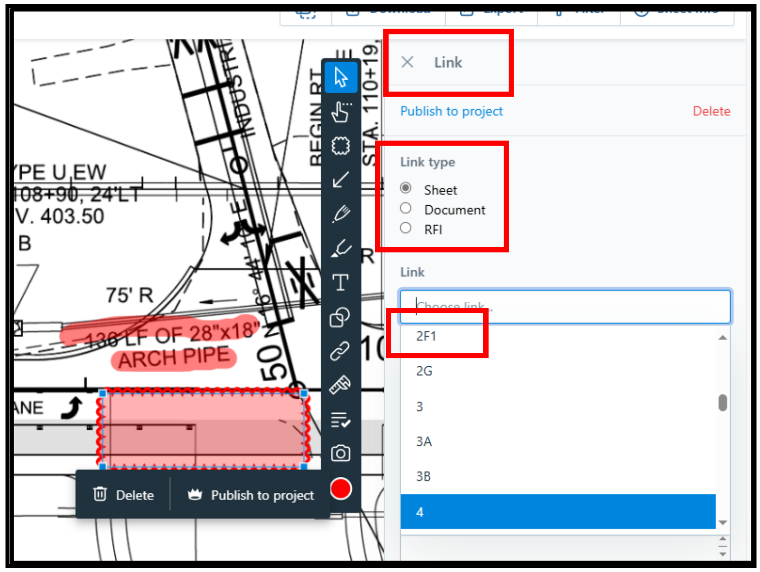
Click on the markups with your mouse, the options to delete and modify the markup will appear. You will also see a pop-out on the right with those options.

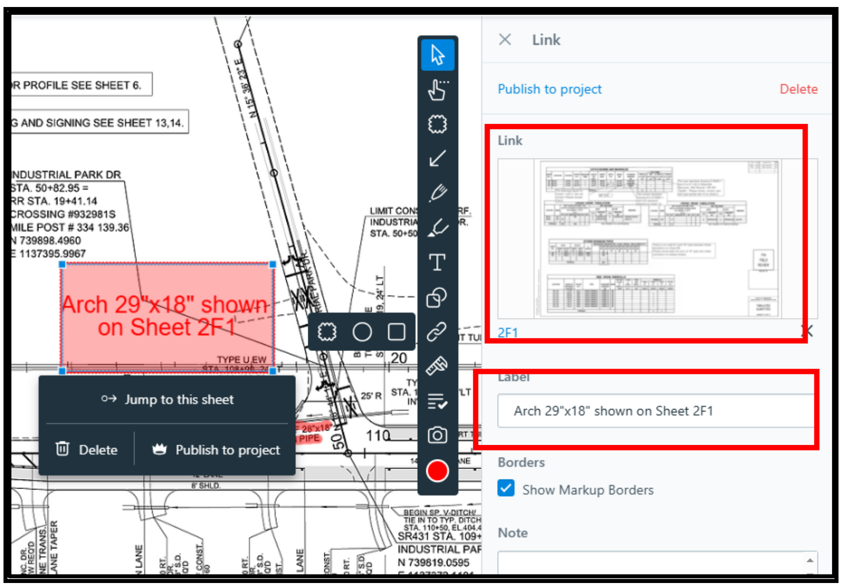



## 7.5 Creating Hyperlinks

In PlanGrid, you can access and/or create information linked a sheet, document or an RFI. For example, click **open link menu**, select **shape**, select **sheet** from the link type, Link 2F1 from the listed sheets and add **Label**.





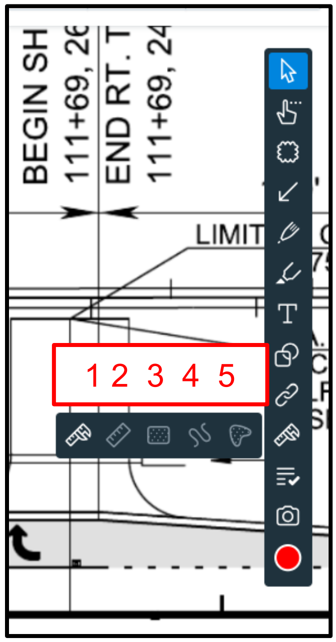




## 7.6 Measurement Tool

You will need to first calibrate the tool before any measurements can be made. To calibrate the measurement tool, click on the ruler icon on the toolbar, then click on the calipers and take a known measurement.

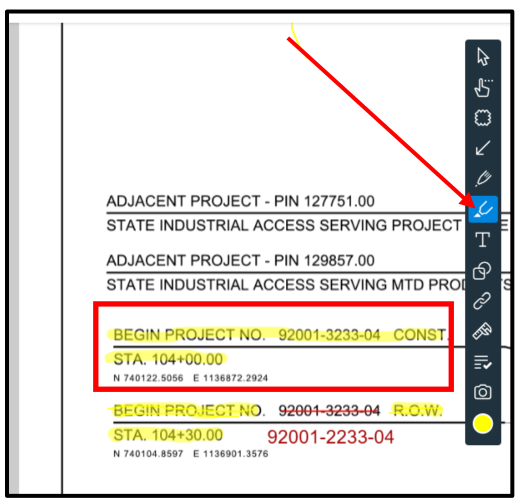
1. **Calibration:** Add a Calibration ruler
2. **Ruler:** Use this to set down a straight line
3. **Rectangular area:** Use this like the box or shape tool, to measure a rectangular area.
4. **Free-from ruler:** Use this like the pen or highlighter tool to measure a curved or irregular line segment.

5. **Free-form area:** Use this to draw an irregular shape on the sheet




## 7.7 Highlight tool

**Yellow Highlight** can be used to draw attention to a specific area on the document.



## 7.8 Selecting and Editing Markups

Once selected, you can move the markup to another location on the sheet or edit its size. To move the markup, click anywhere inside the dashed border to drag the markup to a new location. To edit the size, click and drag on the shape handles to expand or contract the markup.

## 7.9 Sharing my project with other users

To share your project with other PlanGrid users, you'll need to add them to your project team. Team members can only be invited by a project Admin and can be assigned different permission levels.

With PlanGrid, all changes to the published project—published markups, Sheet revisions, Documents, and RFI postings —will automatically sync to all team members on that project.

You can use published markups to share your markups from mobile device to mobile device between team members, or to flag an RFI to the whole team. You can share your markups both from the website as well as the mobile app.

**Please Note:** Only project admins and power collaborators can publish markups to the rest of the team. Collaborators can view all published markups, but they cannot publish their markups to the project.

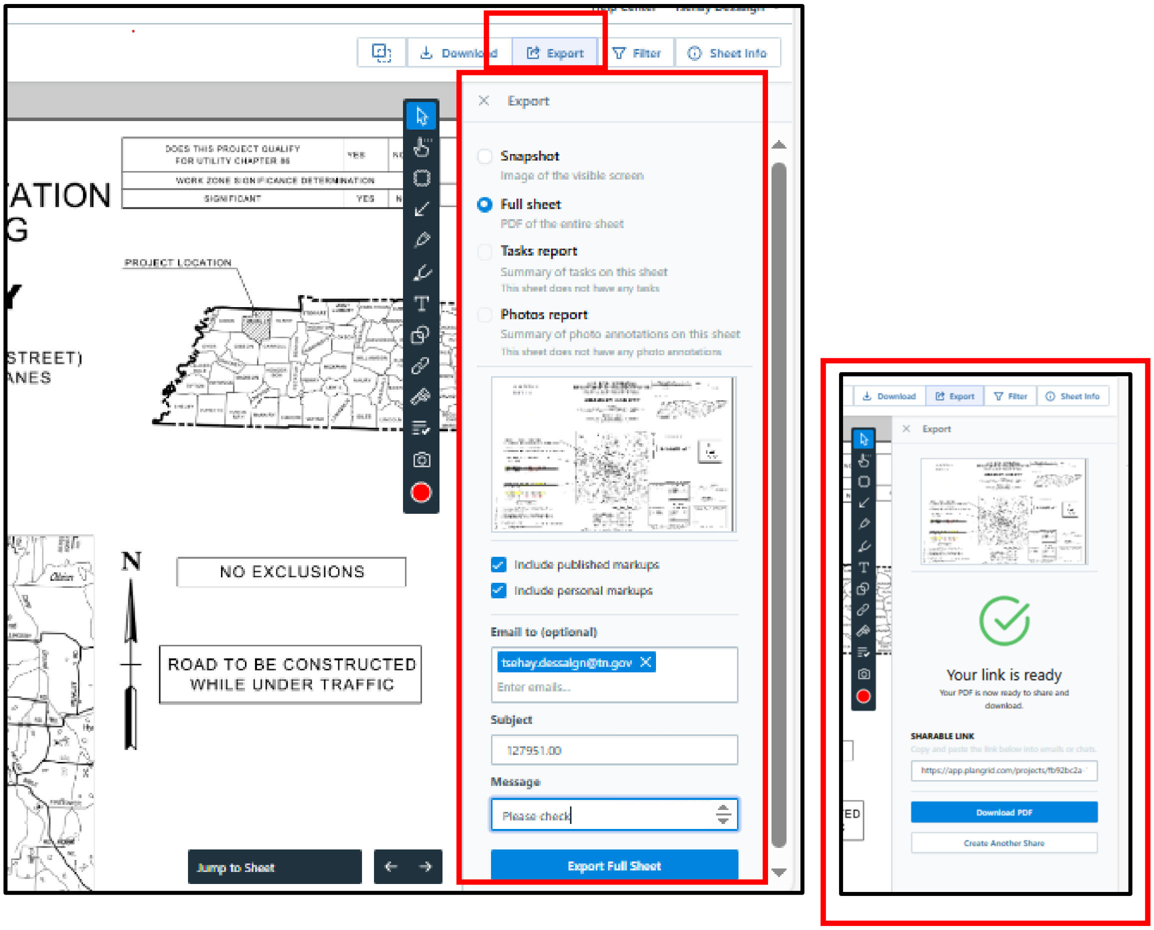
**To Publish a Single Markup to the Project:**

To share a markup with the entire project team, you can simply click or tap on the markup and choose "Publish to Project". Published markups will darken in color to indicate that they have been shared with the project team. This method can be used on the website as well as the mobile app.

## 7.10 Exporting Mark-ups

You can quickly and easily export your individual sheets and mark ups from the website, even if the recipient doesn't use PlanGrid.

There are four different options for exporting your sheet from the sheet view (shown below). To access those options, click on the "Export" button in the upper right corner of your sheet and click the option you prefer to select.




Then PlanGrid will send you an email to view the sheet and download it.