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1. Login and user setup

1.1. Creating login

1.1.1. User Details
Add your personal details of first and last name, your email address, your organisation name or a preferred user name and enter a secure password.
1.1.2. Subscription Details
Select your preferred licence, review the pricing page on the website for all the features that are available for each licence. Your payments can be charged by the month or by the year and you can add multiple users to your subscription. You are signing up for a free 15-day trial. Your account will not be charged until the Trial Period expires. Once the Trial Period expires you will be charged based on the selected subscription, license type and number of users. You can change or cancel your subscription details at any time using the Account Administration page.

1.1.3. Credit Card Verification
Add your credit card details to verify your account. All details from the card are processed through Braintree, which is a PayPal Company. Road Manager does not have access to your credit card details. Once you have logged into Road Manager you can update your billing details at any time. Refer to Account Administration for more details.

1.2. Account Administration
‘Account administrator’ can be accessed at any time by administrator users to review, update and change your information and users.
1.2.1. My account

Keep all your personal details and accounts department information up to date to ensure you have uninterrupted access to the Road Manager program.

Set your custom settings by selecting your measurement units, uploading your logo, adding your local licencing details, setting the time zone and adding any generic notes so it automatically populates your plans and maps as you create them. You can manually replace the logo, licencing details and notes in specific plans when you create them.
1.2.2. My license
Manage the preferred level of access for your licence/s and your subscription payment plan. You can make one change to ‘My Licence’ details per billing cycle, with unlimited ability to add additional users.

1.2.3. Billing
Update the billing details for your account to come straight from your PayPal account or enter your updated credit card details. The credit card details are managed by Braintree which is a PayPal company. Road Manager does not have access to your credit card details.

1.2.4. My users
The administrator has access to manage the number of licences they have purchased by adding and removing users. The administrator has access set the user levels to ensure they only have the relevant access to plans.

1.2.5. External users
Invite other users of Road Manager to be a part of your organisation and access all your plans. Set the level you want to give the user to ensure you have control over your data.

1.2.6. Cancel Subscription
Subscriptions can be cancelled at anytime through the Account Administration. In the My Account section, scroll to the bottom of the page and press the Cancel Subscriptions button. You will have the choice to move to a Road Manager free reviewer account or to fully delete your account. Note that the reviewer account will not give you access to your paid plans. Your data from your paid account will be saved for 3 months before they are deleted.

Tips
Add a relevant email address to the accounts department email address field on the ‘My Account’ tab to ensure invoices are distributed to the right area.
2. Setting up file structure

Road Manager’s file structure has been designed to allow plan sets to be grouped into multiple folder levels or created as a single Plan set file.

2.1. Folders and plan set structure (green screen)

2.1.1. Creating folders

Folders can be added from the + button in the top left corner. Folders can be created within folders to make it easy for you create a workable file structure.

2.1.2. Creating plan sets

Plan sets can be standalone outside of a folder or they can be created within folders.

Example: to separate yearly events - Folder Name: Marathon> Plan set names: Marathon 2016, Marathon 2017.

When creating a plan set the user can set the location/area on a map of the plans, the dates the plans will be used and update Task box information that you want to be the same across all plans. Task box information can also be manually updated at a later stage on each specific plan created.
2.1.3. Searching for folders and plan sets
Use the search bar to find your plan sets and folders in the list. If a user has shared a plan set or a folder with you it will be in the ‘Shared with me’ tab.

2.1.4. Accessing other organisation’s plans
If you have been added to another organisation’s group you will be able to view and access their plans, at the level they have shared them, by selecting the relevant organisation in the drop-down box next to the search bar on the green screen.

2.2. Plan structure (orange screen)

2.2.1. Creating a new plan

2.2.1.1. Basic Info
Add the name or title for the plan. This will display in your Task box.

Add a number for your plan, when creating multiple plans, it will automatically update to the next plan number.

Set a description of your plan - for example - Road closed southbound.

On the map search bar enter the location for your plan. Move the pin into location and zoom the map to the level you want to set the plan at, this will be your default setting (see ‘Setting print defaults’ for more information on screen display).
When you have set the map pin your Symbology Regions, which are the road sign packages available in that area, are automatically generated. You can delete the signs you do not require or keep all sign packages for using when drawing the plan.

2.2.1.2. Dates
Multiple execution dates can be added to your plan. Add the start and finish dates and times and select the ‘Add Execution Date’ button each time you want to add additional times. You do not have to add any dates to your plan. Delete any times from the list if required.

2.2.1.3. Task Box
Header and footer information will only be displayed when you print the plan in the header footer format. Any information added during the Plan set task box setup will automatically display in the plans task box. Use this display to update any information that is specific to the plan. All information in this box will overwrite any other entries.

2.2.2. Creating a new map
Map creation is formatted the same way as creating a plan.

2.2.3. Uploading documents to a plan set
Any documents can be loaded into the Plan set. Click on the ‘Choose Files’ button and select the document and upload. Double click on the document to download and access at any time.

2.2.4. Searching for plans
Search for plans by number or name in the search bar.

Tips
Add as much information to the Task box setup at Plan set level (green screen) so you don’t have to update each plan manually. Get your folder structure setup before adding plans.
3. Creating a plan or map

3.1. Creating a plan or map

3.1.1. Using the tools to draw on the Google map
Tools for drawing over the Google Map™ can be accessed through the side panel. They are categorised for ease of use. Signs are automatically loaded to the location you have created your plan on the map. Tools are all set at specific layer levels so the road layer objects should all sit behind any equipment or infrastructure added to the plan. All objects placed on the map can be copied by pressing Ctrl C and pasted with Ctrl V, the object will be automatically pasted beside the original object. Objects can be moved around the map using the select button to highlight the object/s and with a mouse, trackpad or keyboard arrows. Selecting multiple objects can be done with the multi select tool or by Command>select object for IOS and shift>Ctrl>select objects for other devices. All tools placed onto the map can have a comment added relevant to the object and this can be done through the properties element panel. This will display a red dot beside the object and the comment can be read by hovering over the red dot.

3.1.1.1. Road tools
The road tools have all you should need to replicate or draw a new road on the map. All tools can be adjusted to your specifications using the elements properties panel.
3.1.1.2. Sign tools
Signs are automatically generated from the plan map pin selection. Any signs with ## or <Add> will allow you to edit the text in the sign through the properties panel. Signs can be resized, grayed out and/or sign specific codes can be added to the bottom by selecting the relevant tick box in the properties panel. Rotation and resizing of the signs can all be done on the map by selecting the sign vertices and moving accordingly.

3.1.1.3. Barriers and Infrastructure tools
All single objects will behave the same as the sign tools. Delineator tools will all be placed along a line at the set spacing you set in the properties panel. They will be counted in your inventory per your settings.

3.1.1.4. Basic tools
Basic tools allow you to measure using a ruler or distance marker, add text and text boxes, insert a callout box to add additional information or images to a point, line tools with arrows and other basic and miscellaneous objects.

3.1.1.5. Importing tools
Importing caters for multiple file formats and places the imported file directly over the top of the map. You can set the opacity, resize and rotate as required. Imported images sit in the bottom layer meaning they will always sit on top of the map and behind all other objects so you can draw over the top of all your imported files. You should try and limit the size of files to less than 1Mb.

- .SVG Import allows you to import Scalable Vector Graphics which most other traffic drawing programs allow you to export. CAD files in .DWG and .DXF format can be imported and placed directly over the map.
- GeoJPG consists of 2 files. Both these files must be imported so that the image can be correctly located and scales over the map. You will need to select the .JGW and .JPEG files together when importing. Many of mapping programs allow you to define an area and export to GeoJPG.
- .PNG images can be imported directly over the map.
3.1.1.6. Setting defaults for tools and signs

Tool and sign element properties can be set at a default you choose. When changing any element property, the ‘Set Default’ button will appear. Once you have set a default every time you use a tool it will replicate your selections. Setting a default on a sign will set the default for all of your signs.

3.1.1.7. Application shortcuts

There are a number of shortcut keys that can be used in Road Manager and they include:

- Auto select the selection tool - when drawing on the map right click anywhere on the map off objects and the top toolbar will automatically select the selection tool.
- Multiple selection of object - hold down Cmd key (iOS) Ctrl key (PC) and select objects using the mouse and left click.
- Copy and paste any objects on the screen - Ctrl C to Copy & Ctrl V to paste
- Delete Vertex’s (the dots along lines that make up the object) on lines and polygons - right click on the vertex to delete

3.2. Setting the default views of plans

When setting the default view level for your plans there are a couple of different ways to set it up.

1. On the orange screen when you are creating your plans you need to ensure you zoom the map into the area you are planning on drawing your plans, this will set your default view. You can edit this anytime by selecting the plan edit button zooming in on the map and selecting update.

2. On the blue screen, zoom the map to the level you wish and select the menu bar in the bottom right and select the ‘Set Default View’ tick button.

Once you have your default view set you can select the target button in the bottom left of the map to return to the default view at any time.
3.3. Adding execution dates
There are two ways to set your execution dates for your plan. There is no limit on the number of execution dates you add to a plan. Execution dates do not have to be set for a plan.

1. On the orange screen when you are creating or editing a plan in the popup window there is a tab for adding dates. Enter the start date/time and end date/time into the fields and press the 'Add Execution date' button. Note that if the button is not pressed the date does not get added to the plan.
2. On the blue screen, open the task box in the menu bar in the bottom right of the map. Select the edit button on the task box and the popup window the same as point 1 will appear.

3.4. Updating task box or header/footer
There are two ways to set your task box and header/footer properties for your plan and maps. Any information you have added to your Plan Set task box setup will replicate across all plans in that set until you make a specific change on a plan.

1. On the orange screen when you are creating or editing a plan in the popup window there is a tab for task box. Enter all the information you wish to add and then press update. Your information will automatically be saved and applied to the plan.
2. On the blue screen, open the task box in the header bar. Select the edit button on the task box and the popup window the same as point 1 will appear.

3.5. Setting sign symbology
All road signs are loaded, on the plan edit screen, dependent on the location you have setup your plan in the setup window. For example, if you place the pin on the map in Colorado, on plan setup, you will get the USA and Colorado signs. If you are close to the border you may also get the Kansas signs. You can manually remove the auto detected signs you do not need. To get those signs back after deleting select the Auto Detect button and they will return. If there are any signs missing or you have additional signs to add contact Road Manager and we will add them to the system.

Tips

Use Ctrl C to copy and Ctrl V to paste objects on the map
On plan set up ensure you zoom the map into your plan to set the display defaults
4. Adding documents to a plan set

4.1. Adding a document to a plan set

Any document can be added to your plan set. Choose a file from your explorer or finder window and select upload. The file will be saved in the cloud for you to download and access at any time.

Note that these files will account for your storage limits in Road Manager so try and limit the number and size of documents uploaded or reduce the file size of documents before uploading.
5. Sharing plan sets

5.1. Sharing plans externally

Any folder and plan set can be shared with anybody with an email address. The user, if they do not have access to Road Manager, will receive an email to sign up for a free reviewer login before they can access the shared plan. Road Manager has a free Reviewer login to assist with the unimpeded sharing of plans. When you share a plan you have the option to set an expiry date or have unlimited sharing of the plan. You always have access to revoke the sharing option with each individual user.
6. Adding feedback and comments

6.1. Feedback & comments tool

6.1.1. Adding feedback & comments
Any user can add feedback to a plan. All feedback associated with the plan will be listed if it has not been deleted from view although all feedback is saved for retrieval at any time.

If in Live or Reviewer mode open your menu bar using or select in the feedback tool in the header bar. The feedback panel will open, press the + button, enter your feedback, select the pin next to the text you have entered and place it on the map in the location you wish on the map. The owner of the plan will receive an email notifying them that there is feedback to action. The feedback icon will change colour through the different stages of feedback review and closing out.

6.1.2. Action feedback & comments
Actioning feedback is as easy as adding the feedback. Open the feedback window or select the icon on the map and the feedback window will open. Feedback can also be read on hover over the relevant plan pin on the map and a hazard icon will be displayed on the pin.

6.1.3. Reviewing feedback & comments
Open the feedback tool. Double click on the feedback you want to action. Review the comment and if required add further detail to the feedback or delete their text and add your reply. Change the status to reviewing or closed and press the tick button to finalise changes. The pin on the map will change colour accordingly.

6.1.4. Adding comments on specific objects
All objects placed on the map can have specific comments added to them. This information can be added through the Elements Properties panel. The comments are displayed as a red dot next to the object and it can be opened when hovered over.
6.2. Creating a callout box
In the Basic Tools folder or the bottom right hand corner of the map there is callout box tool that allows you to add a pin on the map that will open up to display text and/or images of your choosing.

7. Export for Printing or creating PDFs

7.1. Creating a Print Region on your plan
Setting a print region makes it easier for you to pinpoint an area you wish to print.

1. Select the Print Region button at the top of the screen then press the Add Print Region button next to the Element Properties. This will automatically add the region onto your plan.

2. Once your Print Region is on the map you can change the settings in the Elements Properties panel to your preferred settings. The region on the map will change size as you change the properties as it has to take into account taskboxes or margins that are set on the templates. Once you have these settings set go ahead and resize the area on the map to your preferred size.
3. Locking and unlocking the print region can be done through the padlock in the right-hand corner of the print region. You can also hide the Print Region by selecting the Print Region button at the top of the screen.

NOTE: If you add a Print Region it will be your printing default unless you change it in the Print Preview window.

7.2. Setting print defaults with or without a Print Region

If you add a Print Region it will be your print default, you will get a warning that you have a print region already, see image below. If you change the defaults in the Print Preview window by pressing the Set As Plan Default button it will change the properties in your print region on the plan. Setting print defaults can also be done in any of the print or print setup screens. Once you have selected your preferences and zoomed in and out on the map to the preferred location, press the ‘set as plan default’ button and your plan defaults will be set until you make any adjustments and press the default button again. Setting the screen display default view does not set the printing default.
Exporting plans for printing or creating PDFs from the plan set page allows you to select the full package of your plan set, including your overview map (refer to section 7.4 to set overview map default settings) You can select between PDF or Image format and whether you want multiple files (single pages) or combined into one document. Note that images will always be produced as single files per plan. Printing may be slow at times due to the size of the plans being rendered into your selected formats. Note that if you have High quality printing selected the plan will take longer to print and will be a large file size.
7.4. Printing a plan

Exporting a single plan for printing from the plan page allows you to select between PDF or Image format. Printing may be slow at times due to the size of the plans being rendered into your selected formats. Note that if you have High quality printing selected the plan will take longer to print and will be a large file size.

7.5. Printing an overview map

The overview map can be printed, viewed and default settings managed by pressing the icon button displayed above. This can be accessed from the green or the orange screen from the right hand selection panel once you select a plan or plan set. The overview map can also be printed while printing a plan set from the green screen. Note that the default settings of the overview map will be applied when printing from this screen.
7.6. Using Printing Templates

There are four (4) printing templates to choose from.

- Map only - this creates only the map with the preferred map base selection
- Header/Footer - creates a box at the top and bottom of the map. Text can be added to the header and the footer through the task box selection
- Task Box - is positioned at the bottom of the map. All information you have added to the Task box fields on setup will be added. It will also automatically add your logo (or selected alternate logo) and a distance marker.
- Sidebar - Works the same as the Task box although it is positioned on the right-hand side of the map.

Tips

Always save a printable copy of your plans to access in case you do not have access the internet.

If you have additional feeds or selections, you would like to see in the templates send your feedback through to info@roadmanager.com and we will see what we can do.
8. Live Mode

8.1. Activating Live Mode

Live mode can also be activated from the orange and blue screens using the buttons below that are found in the top right of the tool bar.

8.2. Using Live Mode

View your plans live during road works or events. Resources in the field can change the status of the plan from out to in, or this can be done in the control room. Field resources can add live feedback.
8.2.1. Live plan overview

- Pins on the map with hazard signs have feedback attached. Hovering over the pin will display the feedback.
- Pins turn green when plans are implemented.
- Click on the pin to open the plan.

8.2.2. Viewing plans

- Leave feedback on the plan through the menu bar.
- Change the status of plan to in/out by selecting the switch.
- Open and close the task box through the menu bar.
9. Additional Support

9.1. User video tutorials
Please visit www.roadmanager.com/how-it-works and https://www.roadmanager.com/training-videos/ to view tutorials on how to setup and use Road Manager or use our live chat feature.

9.2. Contact Road Manager
For all your feedback, questions, assistance or requests for additional features please contact Road Manager staff at info@roadmanager.com or our live chat and one of our friendly staff will organize a time to call you back or action your requests. All feedback on additions to the program are welcomed.