Devices and Meters

Trackplan Device / Meters

Trackplan provides a feature that adds your devices and meters and record readings against these.

To do this you may need to request your superuser to provide permission.

Settings – Users – User Role Manager – Devices

Devices / Meters can be found in the left sidebar, in the Assets submenu.

To create a Device / Meter:

On the device list page, select the +Create Device button (top right corner of the screen)

On the Create Device page

Main Information:

- Name – (mandatory field)
- Code – (mandatory field)
- Device Type – (These can be created in Settings – Device Types)
- Reading format
- Description
- Associated to – Devices can be associated to Site – Asset or Stand Alone

Thresholds and Triggers:

- Threshold Type – can be set by cumulative or single-entry data point.
- Initial Threshold Value – set the initial device Value.

- Trigger Events: reading over threshold, reading below threshold, reading not received for X days.
- Start Date – set start date.
- End Date – set end date.

Email Notifications on Trigger:

- Select whether trigger event emails are sent to Teams or Individual Users

Create Jobs on Trigger:

- Select if you want a job to be created from a trigger event.

Status:

- A Device Status can be selected from the dropdown menu.

Additional Sources:

- Here you can link a form to a Device / Meter – useful to carry out and input readings against a device (see below)

On completing these fields select the Save button (top right corner of the screen) to create your device.

Across the top of the screen, you will have Tabs available.

- Details – details of the device / meter with options to edit the device.
- Reading Entries – Here entries can be inputted manually or taken from a linked form where the integer of decimal question has been used.
- Documents – attach documents to this device.
- Chart – will create a chart based on the provided meter readings, there is also a Chart Controls button with options to modify the chart.