Recommended Initial Steps and Guide For Going Live

Setting up Sites and Locations

Each building can be set up as a site. Each site in turn can be divided into locations and sub-locations. Sites can be categorized into site types and regions – the site types and regions can be set up in the settings area. Each site, location and sub-location can be given their own codes.

Reactive jobs are created against sites and locations within a site.

Planned schedules can be set up against sites, locations within sites or against assets.

Sites can be loaded in from a spreadsheet using the upload centre. But we recommend creating the sites through the interface for a small number of sites.

Note that assets must belong to a site and optionally a location / sub location in a site.

How to accept requests

Job Requests are work orders raised by staff members or clients for work to be done. Users can create requests by logging into Trackplan and completing a simple wizard.

These requests can then be approved into reactive jobs for the helpdesk to manage.

In addition, users can email in requests to a designated email address which will create requests in Trackplan. The emailed requests can be correctly routed to the correct site and location if the staff member and their email address are set up as site contacts.

Requests can also be received by sending a unique URL to all staff members. This URL is generated in the Settings area – Job Requests.

We also have a Request App for logging requests for Users or non-login users.

Decide if and how you want to use them.

Setting up users

Each user can be given access to all sites, a single site, multiple sites or a collection of sites. This is managed from the settings -> users area.

Each user can be assigned a role give full or restricted access to the features.

User settings control when they receive emails and what they are able to do. See the user detail page for each user in the users area.

In addition, user types can be set up with a pre-determined set of rights – users can be assigned to a user type to make user management easy.

There is also an app available for users where they can view and manage jobs on a device such as Android or iPhone. Consider if and when you want to use this.

Loading resources (contractors and engineers)

Contractors and internal engineers can be manually entered through the Resources area.

Contractors can be given access to view, manage and complete their instructed jobs in the contractor portal. They can also create quotes, enter costs, upload documents, add job notes and take photos.

There is also a “resource app” app available for contractors and engineers where they can view and manage instructed jobs on a device such as Android or iPhone. Consider if and when you want to use this.

There is also an upload centre for creating your resources from a spreadsheet.

We also have a Contractors Portal. All Resources can be given access to this via an link attached to the Job instruct email.

Setting job priorities, job types, email templates and other settings

In the settings area, many of the dropdowns and email templates can be configured. Before creating jobs, we recommend at the least you look at setting up:

- Users and user types for user management
- Job requests
- Email templates
- Reactive and planned job types
- Job priorities
- Asset Classes
- Site regions and site types
- Resource trades and qualifications
- Location Types

Assets

Assets can be created in the assets area. Each asset must belong to an asset class.

Each asset must belong to a site and / or a location within that site.

Each asset must have a unique asset code / number.

Assets can be tagged with QR Codes

Jobs and planned schedules can be set up for assets.

Assets can be loaded in from a spreadsheet using the upload centre. But we recommend creating the assets through the interface for a small number of assets.

Planned Maintenance

Planned maintenance schedules can be set up in the planned maintenance -> planned schedules area. Each schedule must be set up for sites, locations or assets (specifying an asset class). Multiple sites, locations or assets can then be attached to the planned schedule.

You can also set up a maintenance schedule quickly against a specific site or asset from the planned schedules tab of the site or asset details page.

There are 3 schedule types – the most commonly used is "Regular". This creates one job at a time. A new job is created once the current due job is completed. You can also choose to delay the creation of a planned job to just before it is due to be delivered – this helps to avoid confusion for users and resources. Configure this on the planned schedule screen.

Inspections and electronic forms

In the forms area you can design forms to help with inspections, risk assessments, surveys, permits to work and meter readings. You can create multiple questions per form with several questions types including Yes/No, Text, Number, Photo, Signature, Pass/Fail, dropdowns and multi-select. There are over 12 question types.

You can break the form into sections and group questions into different sections.

You can issue forms with a job or planned schedule, or you can make them available for general use in the forms library.

Note that for forms requiring regular daily input such as meter readings or toolbox audits, you can set a section up as “repeatable”, so multiple entries can be made into one form.

Forms can be attached to reactive jobs and planned schedules for completion by the FM team or contractor. You can also complete forms on the fly against sites and assets

Budgets and Costs

Costs rows can be completed against jobs. In addition, in the finance area, multiple budgets can be set up, and jobs can then be attached to one of these budgets. Job types and sub types can be set to assign the job to a specific budget. Or this can be selected manually once the job is created.

Document Management

Documents and photos can be uploaded against sites, jobs, assets and resources. In addition, you can create document tags to help categorise and organise documents.

Apps

There are three apps:

- The “Resource App” for engineers and contractors. Set this up from the portal and app tab of the resource details page. On the app they can view the instructed jobs sent down to them. They can then complete the job, add photos, documents. And they can also complete electronic forms sent down to them such as for inspections. They can also create new jobs.

- The “Manager App” for other users such as maintenance managers, site managers or facilities managers. Set this up from the offline tab of the user details page in the settings area. In this app a user can see all the jobs they have access to. They can take photos, add notes and also add new jobs.
- The “Request App” for users or non-login users to raise requests on a certain site, location, sub-location or asset. Users can also view older requests.

Contractor Portal

Internal/External contractors, Sub-contractors can have access to the Contractor Portal. The simplest way of doing this is to add a link to the instruct email that will to sent to the contractor. Edit the email template via Settings–>Email Templates–> To Contractor on Instruct 1 or To Contractor on Instruct 2.

You can also give the resources access individually via the Portal & App Tab on the Resource Details Page.