

Upload Centre

The *Upload Centre* is where you can upload new data and / or update data from a spreadsheet for Sites, Site Locations, Users, Resources, Assets, Jobs, Planned Maintenance Schedules, and Stock. The *Upload Centre* can be found in the *Settings* area, or within the drop-down selections from the sidebar.

For each area mentioned above you can:

- **Sites:** Upload all of your sites.
- **Site Locations:** For larger buildings with many locations and sub locations, you can upload this information from a spreadsheet for already existing sites.
- **Users:** Upload all of your main system users. You can also allocate a user to a user type with its own profile of settings and permissions.
- **Resources:** Upload your contractors and engineers; this can include login access to the online resource portal.
- **Assets:** Upload all your assets, which must belong to an already existing site. You can also attach up to 6 planned maintenance schedules already set up in the planned maintenance area.
- **Jobs:** The jobs upload feature is a good tool for uploading your job history for the last few years. Please contact a member of Trackplan Customer Support for this template
- **Planned Maintenance Schedules for Assets:** Use the assets upload to attach each asset to up to 3 planned maintenance schedules.
- **Stock:** Upload all of your stock, including stock levels and reorder levels.
- **Planned Schedules:** Upload all of your Planned Schedules
- **Advanced Job Routing** – Assign jobs to a specific user, team or resource based on the type of job, job priority, location and day and time

- **Price Catalogues:** *Template used for the upload of price catalogues*
 - **Price Catalogue Items:** *Template used for the upload of price catalogue items*
 - **Planned Items:** *Template used for the upload of planned items*
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Steps to follow for upload are as follows:

1. **Download Template:** Click *Download Template* on the main *Upload Centre* page, and choose the template you wish to use. Use this spreadsheet template to create your data. You can delete the dummy example data shown in the template, but ensure you keep the column headings as shown. Save your new spreadsheet.

2. You also have the option when downloading a template to 'Download Existing Data with Template'. For example, if you already have sites on the trackplan system this will populate the template with those sites. A great feature if you need to edit certain data on multiple sites.

3. **Upload Data:** Click *Upload* and choose the spreadsheet you have populated from the template.

4. **Check Information is Correct:** A list of the data rows you are uploading will be displayed on-screen. Check that this information is correct. If not, edit the spreadsheet and re-upload.

5. **Save:** Once you are happy with the list of data uploaded, click *Save* to save the information to the database.



Download Template List

Templates

Assets Template

Download Existing Data With Template

Help

1. Assets Template: *Template used for the upload of assets and any associated planned maintenance schedules.*
2. Resources Template: *Template used for the upload of resources.*
3. Sites Template: *Template used for the upload of sites and any associated planned maintenance schedules.*
4. Locations Template: *Template used for the upload of locations*
5. SubLocations Template: *Template used for the upload of sublocations*
6. Site Locations Template: *Template used for the upload of locations and sublocations to sites*
7. Stock Template: *Template used for the upload of stock.*
8. Users Template: *Template used for the upload of users.*
9. Planned Schedule Template: *Template used for the upload of planned schedules.*

Download Close

Tip: Dates need to be in the format of dd-mm-yyyy OR dd-mm-yy OR yyyy-mm-dd.

- For example: 15th of July could either be 15-07-2020 OR 15-07-20 OR 2020-07-15. Please ensure you apply a format to your excel spreadsheet to the date column in order to achieve this (right-click, *Format Cells -> Number -> Date*).