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QUICK TIPS TO UPLOADING EXISTING PLANS

One question we frequently receive from users is: "Can we upload our existing plans into CEMPlanner or do we have to build a new plan from scratch"?

CEMPlanner allows you to quickly and easily upload your existing plans into the system. It's a simple process that we review in this month's issue of Implements.

Start with strong bones and create a good plan skeleton!

The Chief Planner role has the ability to re-create any structure of any existing plan inside CEMPlanner. Once the structure of the plan is re-created, the original plan content can be easily uploaded by any authorized planning team member by simply cutting and pasting from the existing plan into CEMPlanner.

In the image below, you can see one of the best practices in re-creating <u>a</u> plan structure.





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<u>Step 1:</u> Select "edit the plan structure" of the appropriate plan and arrange your windows side by side so that your existing plan document window is next to the "edit the plan structure" window. (see image above on pg 1)

Step 2: Edit and modify your plan structure by using existing CEMPlanner sections or create a new structure based on your Table of Contents. To begin, simply uncheck any CEMPlanner section you do not want to use. To add new sections select "add new section". (*Note:* Don't forget - as you are adding sections to your plan structure; be sure to check off which sections are "headers only without content"!)

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<u>Step 3:</u> When you have finished editing your plan structure, select "Done".

Once you select "Done", the plan structure will be created and all authorized users can upload and edit plan content. (*Note:* any section selected as "header section only" will appear in a different color and will not have a "show content" link.)

To upload content:

Step 1: click "show content" of the appropriate section

Step 2: click "view plan."



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Step 3: Once the word document opens, simply cut and paste your existing content into the CEMPlanner word document and go through the saving procedure.

Again, when cutting and pasting content, it's easiest to keep the upload document and existing document side by side as shown below. (*Note: To limit the home screen from popping out in front of the upload screen every time you open a new section, drag the home screen window down to the bottom of your screen, or if using dual screens move it to the other screen.*)



