UPLOADING YOUR ROADMAP INTO

AIRTABLE

What is Airtable?

An online platform for creating and sharing relational databases.

Sign up via: https://www.airtable.com

Register your email, create a password and respond to the verification email sent to your inbox (check spam folder).

Free sign up includes:

- Unlimited bases (spreadsheets)
- Up to 5 users
- 1,200 records per base
- 1 app per base
- 2GB of attachments per base
- Real-time collaboration and commenting
- Web, desktop, iOS, and android app

Airtable Pros

- Easily tracks project progress.
- Has an array of templates and layouts to choose from.
- Great view options, from grid, to calendar, kanban, and more.
- As a relational database, it doesn't just store data, it stores relationships *between* that data, making it easy to filter categories and organising large amounts of information.

Getting started - Terminology

Spreadsheet = Base
Each spreadsheet is organised into its own spreadsheet file. In Airtable, each spreadsheet will become its own base.

Tabs = Tables
Spreadsheets contain tabs for different data sets. Each type of data is organised into its own table.

Rows = Records
Spreadsheets contain rows of information. In Airtable, those are called records.

Columns = Fields
Spreadsheets contain columns of data. In Airtable, those are called fields. There are dozens of field types to add formatting to your data.

Airtable Cons

- High learning curve.
- Lack of communication solutions.
- Similar to other softwares, there are three pricing plans (free, plus, and pro). However, Airtable charges per user instead of per organisation making it more expensive than other similar online tools.
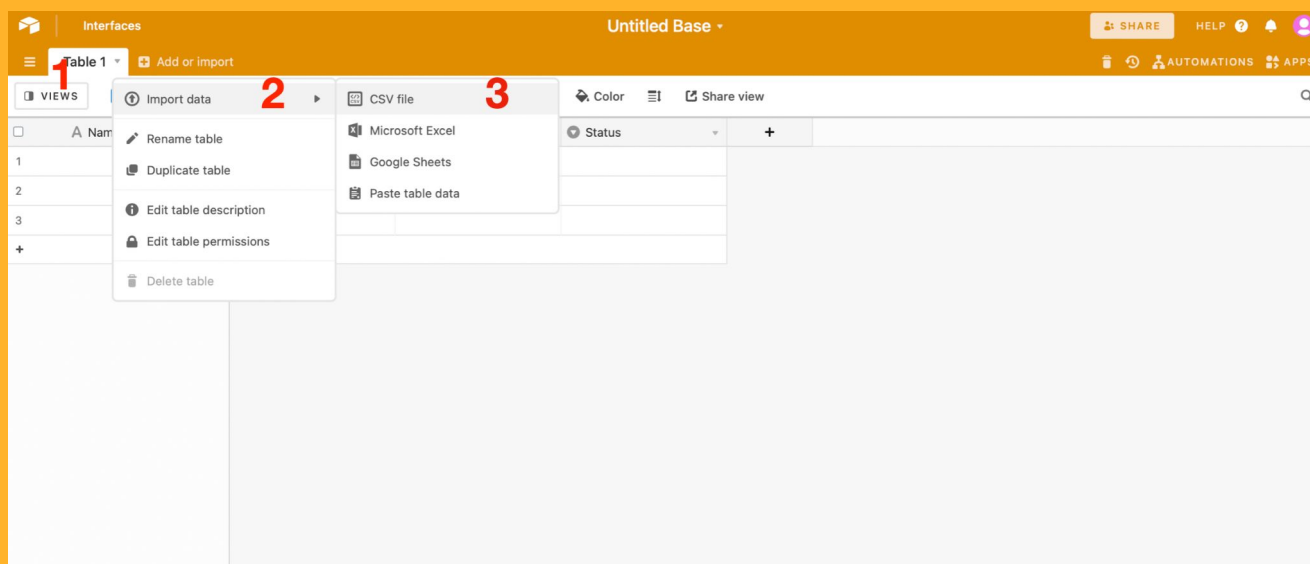
Downloading your FuturePlus Roadmap as a CSV file

On your FuturePlus Dashboard, simply scroll down to the bottom of your Roadmap and click 'Export To', then choose CSV file.

Uploading a CSV file into Airtable

After setting up an Airtable account, you will be able to create your workspace, either from scratch or with a template. This is an example of what it would look like from scratch on a new base:

To upload your CSV file

1. Click on the downward arrow next to **Table 1**
2. Hover over **import data**
3. Click **CSV file**
4. Select file(s) for upload

Need more help?

Contact the FuturePlus team: team@future-plus.co.uk

Or for additional information and guidance visit:
https://support.airtable.com/hc/en-us
https://www.youtube.com/c/AirtableApp/featured