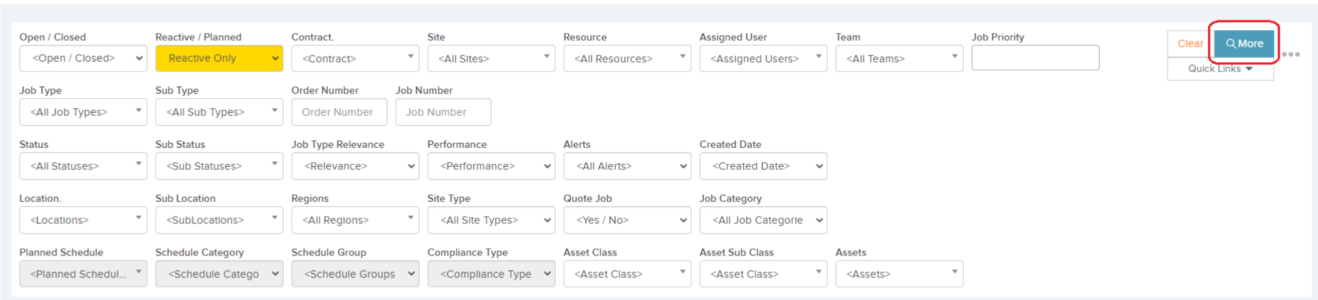
Can I Create My Own Customised Reports?

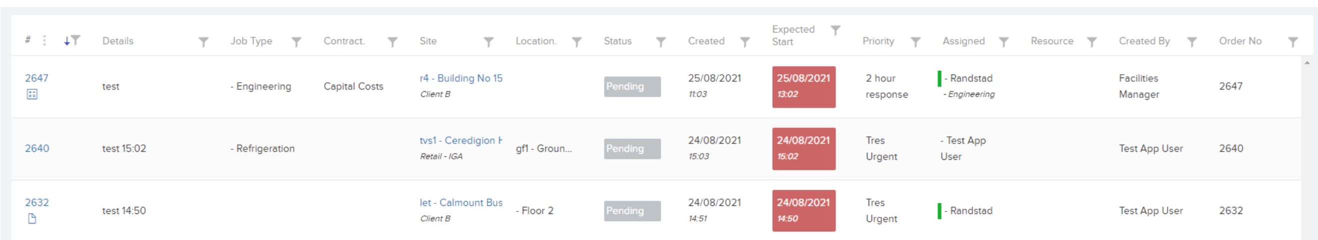
With Trackplan you can create your own customised reports using the various filters and grid customisation options available for each item list (for example reactive and planned jobs, planned schedules, time records, form results etc.).

Each item list, or grid, in the main Trackplan application will have a *Filters* option. For example, on the Reactive Jobs List page, the *Filters* button on the top-right of the page, when clicked, will reveal various filtering options:



Any of these filters can be adjusted through drop-down menu options and will be automatically applied to the list.

The list itself will be displayed on a grid:



Within this grid, any column heading can be selected to sort the list using that particular heading:

At the top-left of the grid, there will be three dots next to the “#” symbol. These three dots, when clicked, will reveal more options; the *Columns* option will allow you to choose which columns you would like to see displayed on the grid, *Save Columns* will save these options, and *Reset Columns* will reset the columns back to the default view:

As you can see there are many different ways to customise item lists in the Trackplan application. These customisation abilities allow you to export reports with the information you want, this includes lists that have been customised to only show specific information.

To do this, simply click on the three dots next to the *Filters* button as shown below:

This will show the option *Excel Export* which will allow you to export the list to an Excel document: