

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:



Open / Closed

Reactive / Planned

Contract

Site

Resource

Assigned User

Team

Job Priority

Clear

Q More

Quick Links

Job Type

Sub Type

Order Number

Job Number

Status

Sub Status

Job Type Relevance

Performance

Alerts

Created Date

Location

Sub Location

Regions

Site Type

Quote Job

Job Category

Planned Schedule

Schedule Category

Schedule Group

Compliance Type

Asset Class

Asset Sub Class

Assets

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:

#	Details	Job Type	Contract	Site	Location	Status	Created	Expected Start	Priority	Assigned	Resource	Created By	Order No
2647	test	- Engineering	Capital Costs	r4 - Building No 15 Client B		Pending	25/08/2021 11:03	25/08/2021 13:02	2 hour response	- Randstad - Engineering		Facilities Manager	2647
2640	test 15:02	- Refrigeration		tvst - Ceredigion h Retail - IGA	gfl - Groun...	Pending	24/08/2021 15:03	24/08/2021 15:02	Tres Urgent	- Test App User		Test App User	2640
2632	test 14:50			let - Calmourt Bus Client B	- Floor 2	Pending	24/08/2021 14:51	24/08/2021 14:50	Tres Urgent	- Randstad		Test App User	2632

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:

