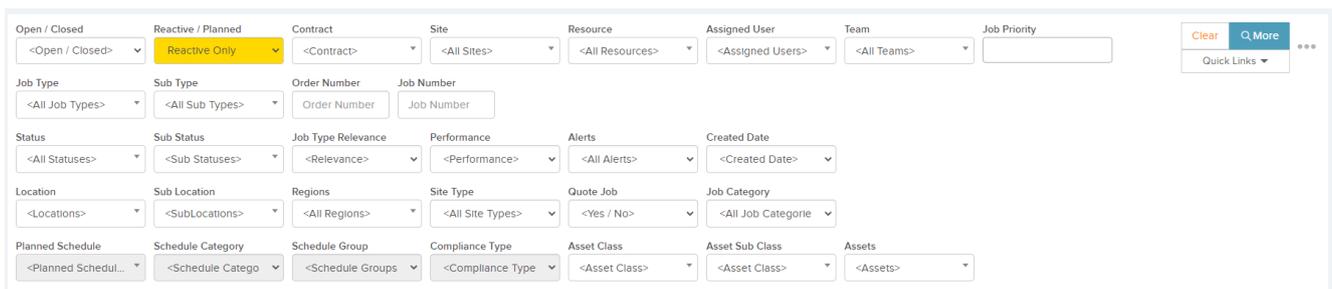


Jobs List

The *Jobs List* view helps you to observe key job information row by row in one clear list.

You can filter the jobs on any criteria, including a text box that allows you to search by job number. Click on *More* at the top right of the page to reveal the filtering options:



The screenshot shows a filter panel for the Jobs List view. It contains several sections of filters:

- Open / Closed:** A dropdown menu with options like '<Open / Closed>' and 'Reactive Only'.
- Reactive / Planned:** A dropdown menu with 'Reactive Only' selected.
- Contract:** A dropdown menu with '<Contract>' selected.
- Site:** A dropdown menu with '<All Sites>' selected.
- Resource:** A dropdown menu with '<All Resources>' selected.
- Assigned User:** A dropdown menu with '<Assigned Users>' selected.
- Team:** A dropdown menu with '<All Teams>' selected.
- Job Priority:** A text input field.
- Clear Q, More:** A button with 'Clear' and 'Q, More' text, and a three-dot menu icon.
- Quick Links:** A dropdown menu.
- Job Type:** A dropdown menu with '<All Job Types>' selected.
- Sub Type:** A dropdown menu with '<All Sub Types>' selected.
- Order Number:** A text input field with 'Order Number' placeholder.
- Job Number:** A text input field with 'Job Number' placeholder.
- Status:** A dropdown menu with '<All Statuses>' selected.
- Sub Status:** A dropdown menu with '<Sub Statuses>' selected.
- Job Type Relevance:** A dropdown menu with '<Relevance>' selected.
- Performance:** A dropdown menu with '<Performance>' selected.
- Alerts:** A dropdown menu with '<All Alerts>' selected.
- Created Date:** A dropdown menu with '<Created Date>' selected.
- Location:** A dropdown menu with '<Locations>' selected.
- Sub Location:** A dropdown menu with '<Sub Locations>' selected.
- Regions:** A dropdown menu with '<All Regions>' selected.
- Site Type:** A dropdown menu with '<All Site Types>' selected.
- Quote Job:** A dropdown menu with '<Yes / No>' selected.
- Job Category:** A dropdown menu with '<All Job Categories>' selected.
- Planned Schedule:** A dropdown menu with '<Planned Schedule>' selected.
- Schedule Category:** A dropdown menu with '<Schedule Category>' selected.
- Schedule Group:** A dropdown menu with '<Schedule Groups>' selected.
- Compliance Type:** A dropdown menu with '<Compliance Type>' selected.
- Asset Class:** A dropdown menu with '<Asset Class>' selected.
- Asset Sub Class:** A dropdown menu with '<Asset Class>' selected.
- Assets:** A dropdown menu with '<Assets>' selected.

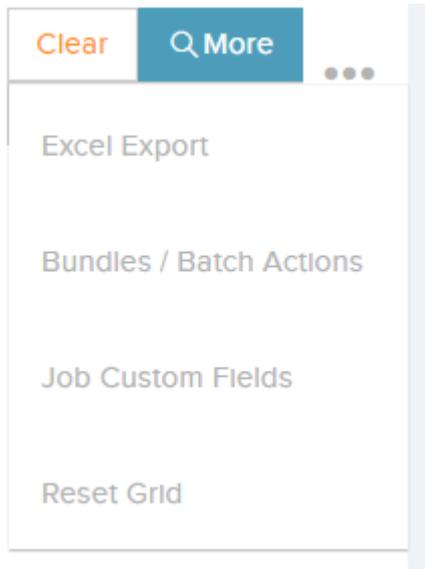
The grid can be sorted by clicking on any of the column headings. You can also add or remove columns from the grid to display the information you want to see. Simply click on the three dots next to the job number column heading.

For example, if you would like to filter jobs by the relevant teams, you can add the teams column.

Overdue work is highlighted in red, and jobs can be colour coded by assigned user.

Icons under the job number indicate if there is an alert, a document, assets, quotes etc. assigned to that job. Hovering over these icons will display pop-up telling you what each icon means.

The three dots next to the *More* button reveals these options:



- **Bundles / Batch Options** – This will bring you to the *Bundles / Batch Actions* view where you can group jobs together into a bundle. Grouping jobs allows you to perform actions across the entire group such as:
 - Assign multiple jobs to a resource / contractor
 - Instruct multiple jobs to a resource / contractor
 - Complete multiple jobs
 - Approve multiple jobs
 - Cancel multiple jobs
- **Excel Export** – This will allow you to export the jobs list to an Excel sheet.
- **Clear All Filters** – This will remove any filters you have applied to the list.
- **Reset Grid** – This will reset the Job List Grid to list all the original columns.

Your company job history can also be uploaded to Trackplan, a good tool for keeping track of your job history over the last few years. Please contact a member of Trackplan Customer Support for this template.