

Jobs List

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

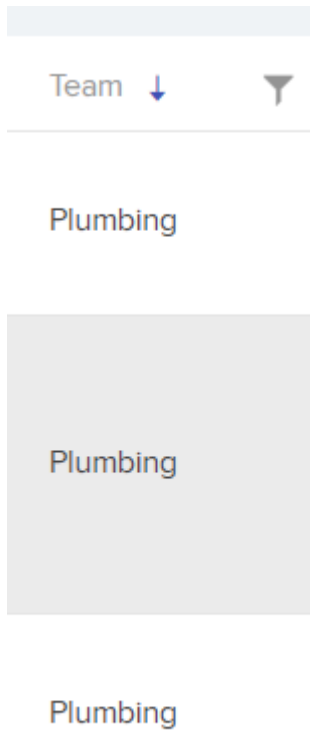
You can filter the jobs on any criteria, including a text box that allows you to search by job number. Click on *More* at the top right of the page to reveal the filtering options:

The screenshot shows a comprehensive filter panel for the Jobs List view. It includes dropdown menus for 'Open / Closed' (set to 'Open / Closed'), 'Reactive / Planned' (set to 'Reactive Only'), 'Contract', 'Site', 'Resource', 'Assigned User', 'Team', and 'Job Priority'. There are also text input fields for 'Order Number' and 'Job Number'. Other filters include 'Job Type', 'Sub Type', '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', and 'Assets'. A 'Clear' button, a 'Q More' button, and a 'Quick Links' dropdown are located on the right side of the panel.

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:

The screenshot shows a column selection menu. On the left, a red circle highlights a three-dot menu icon. Below it, a dropdown menu is open, showing options: 'Columns' (with a right arrow), 'Save Columns', and 'Reset Columns'. On the right, a list of columns is displayed with checkboxes: 'Sub Type', 'Category', 'Budget' (highlighted), 'Region', 'Site Type', and 'Site' (checked).

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

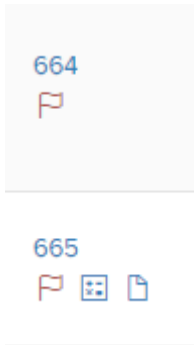


Overdue work is highlighted in red, and jobs can be colour coded by assigned user:

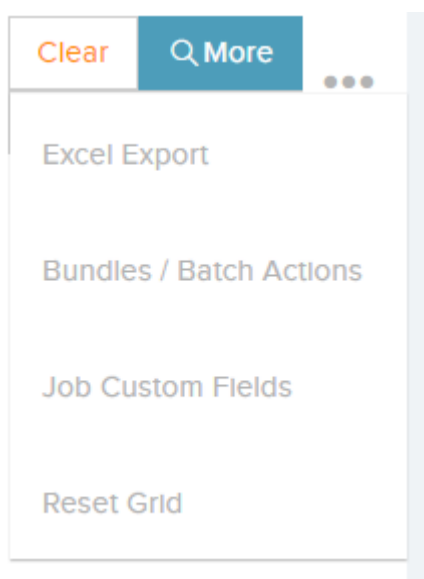
| Status | Created | Expected | Priority | Assigned |
|------------|---------------------|---------------------|----------|------------|
| Complete | 30/08/2018 14:15 | 08/11/2018 19:30 | | Facilities |
| Complete | 31/08/2018 16:02 | 31/08/2018 16:01 | | Team |
| Instructed | 03/09/2018 12:52 | 27/09/2018 12:51 | | Eric |
| Instructed | 03/09/2018 12:53 | 23/09/2018 19:52 | Low | Pauline |

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.