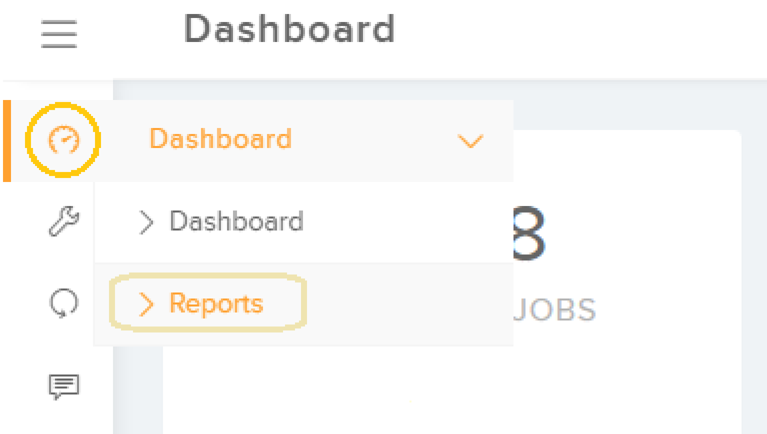
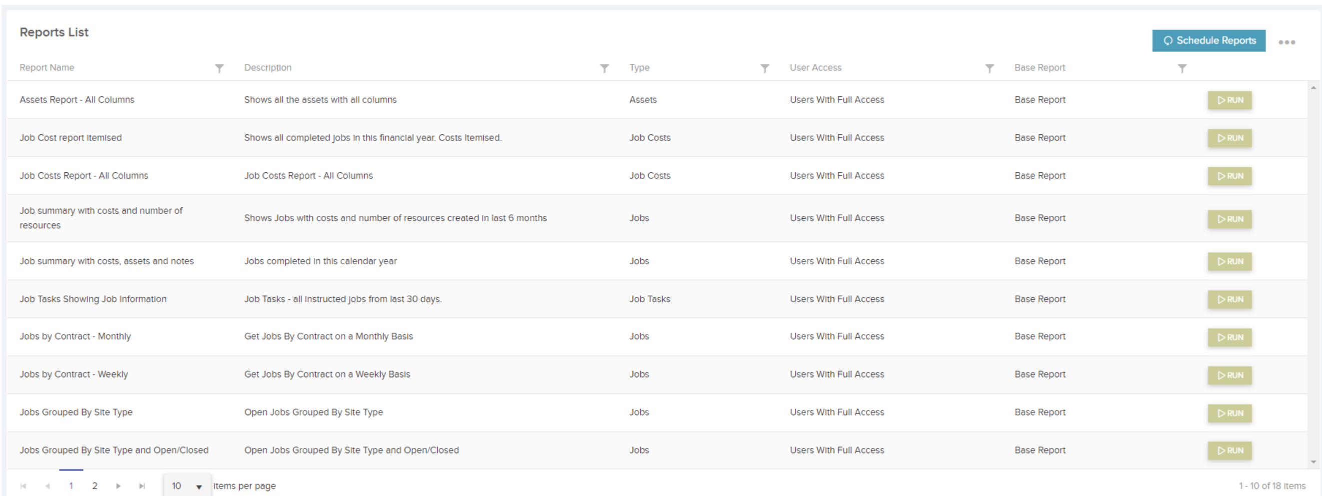
Report Manager

Trackplan has a Report Manager that allows you to view and manage reports. Each report can be extended with a variety of filters, and you can control which users have access to certain reports. You can also schedule reports to be sent out to users on a set frequency.

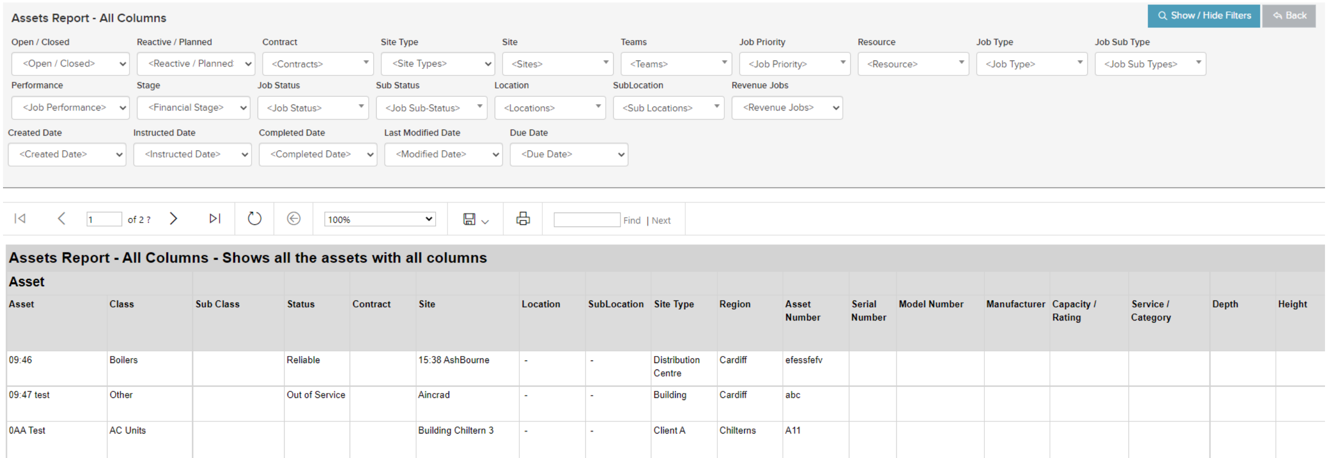
The *Reports List* area can be found here in the side-bar:



There are 20 base reports in the *Reports* area by default, which can be used or edited to create a new report. The *Reports* grid can be sorted by selecting any of the column headings:



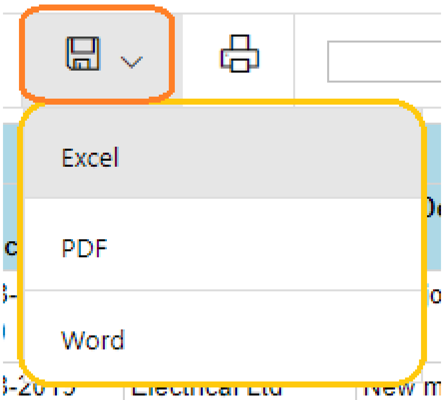
Click *Run* next to any report you wish to view. This will run the report and bring you to the below view.



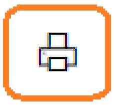
From here you can filter the report / change active filters such as:

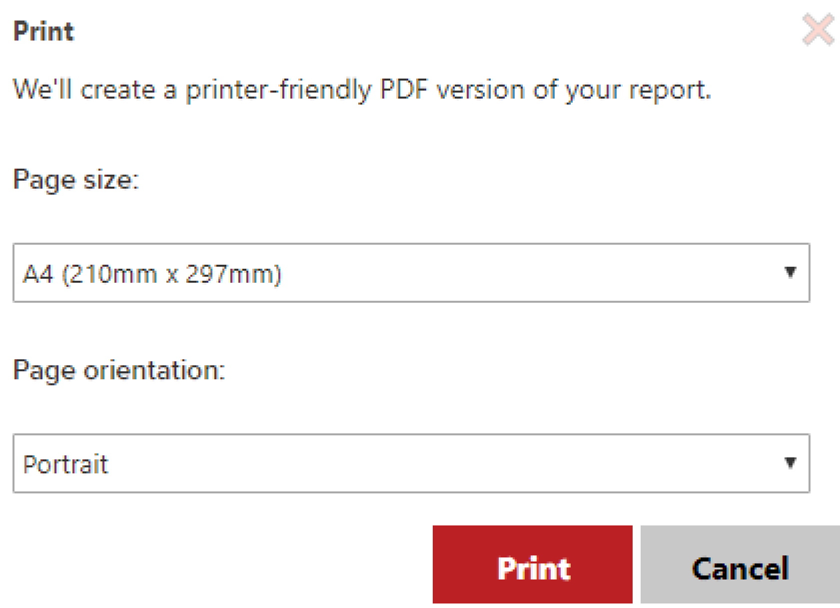
- Open or closed jobs
- On time or over due
- Date created
- Instructed date
- Completed date
- Date last modified
- Reactive or planned jobs
- Sites
- Location
- Sub location
- Site types
- Resource
- Job Status
- Sub Status
- Revenue Jobs
- Job Type
- Job Sub Type

Under the filters area are a number of options that allow you to move to the next page, search for specific words / terms, refresh the page. Included in this bar are options to download the report as either an Excel sheet, a PDF, or a Word document:

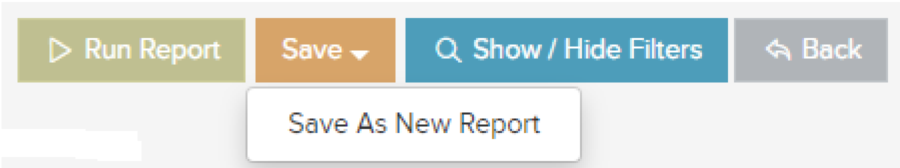


Trackplan also provides the option to download a "printer friendly" PDF, simple click on the printer icon (beside the save icon) as shown below:



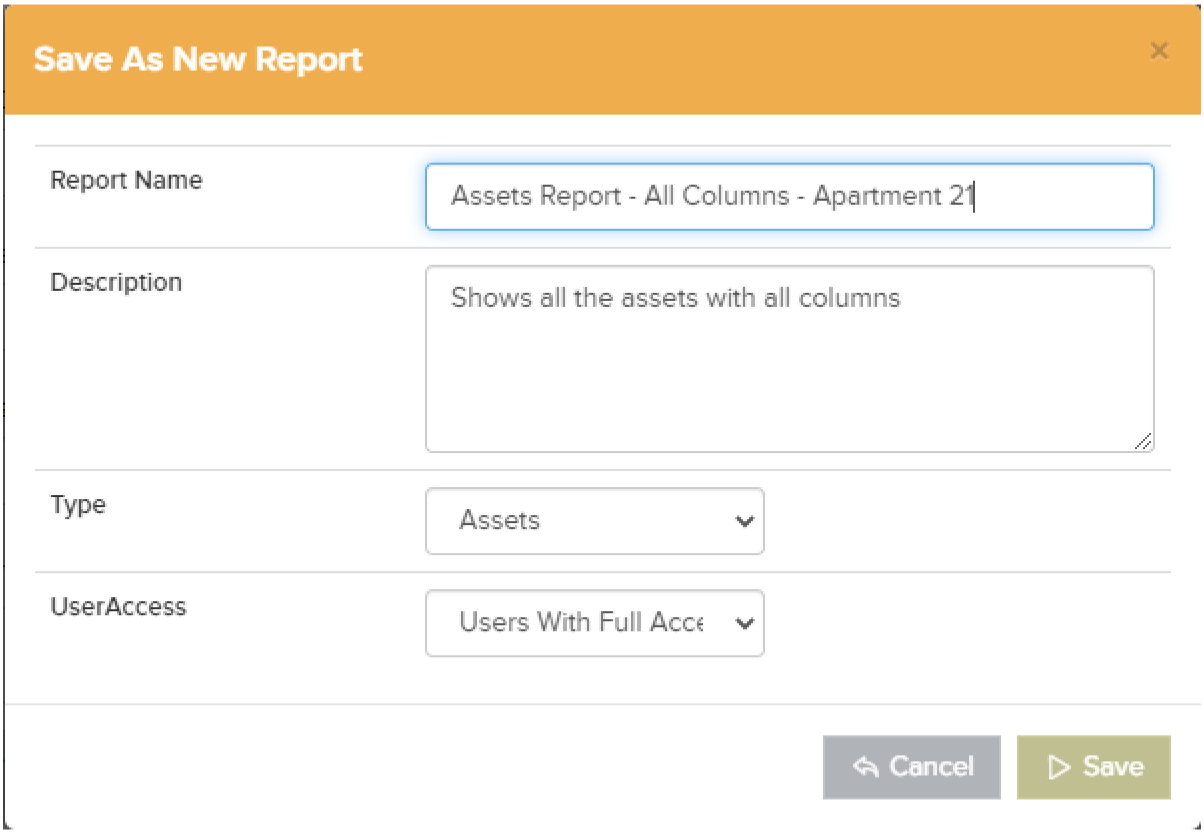


When you have selected your desired filters, two new buttons will appear at the top-right:

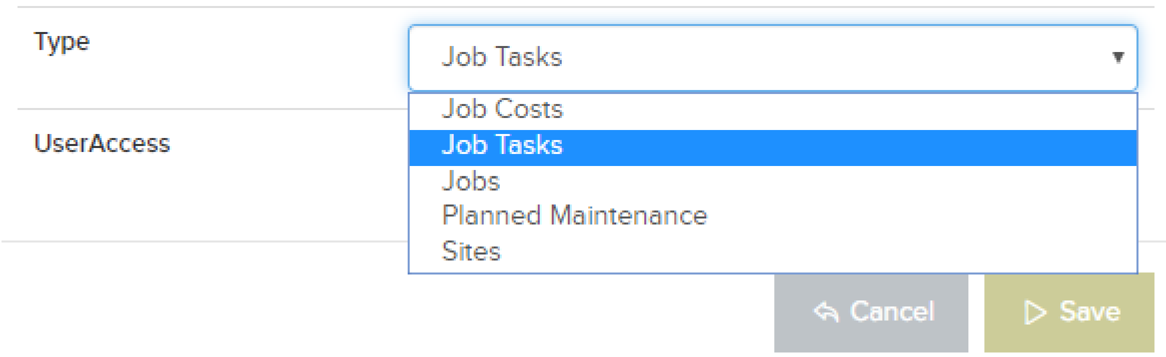


Run Report will run the report with your new filters.

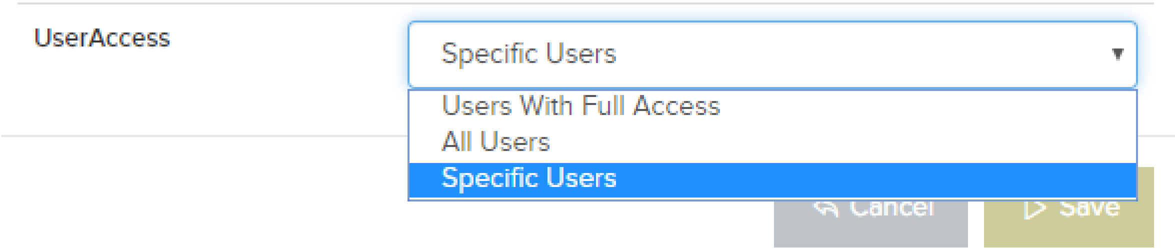
Save as New Report will allow you to save these filters as a new report for easy access.



The *Type* drop-down menu will allow you to choose from these options:



The *User Access* drop-down will show these options:



- **Users with full access** will allow users of this type to access this report.
- **All users** will allow all users set up to access this report
- **Specific users** will allow you to select specific users from the users list and give them access to this report after you save the new report.

From the main *Reports* list you can also edit information on other reports by selecting the *Edit* button:

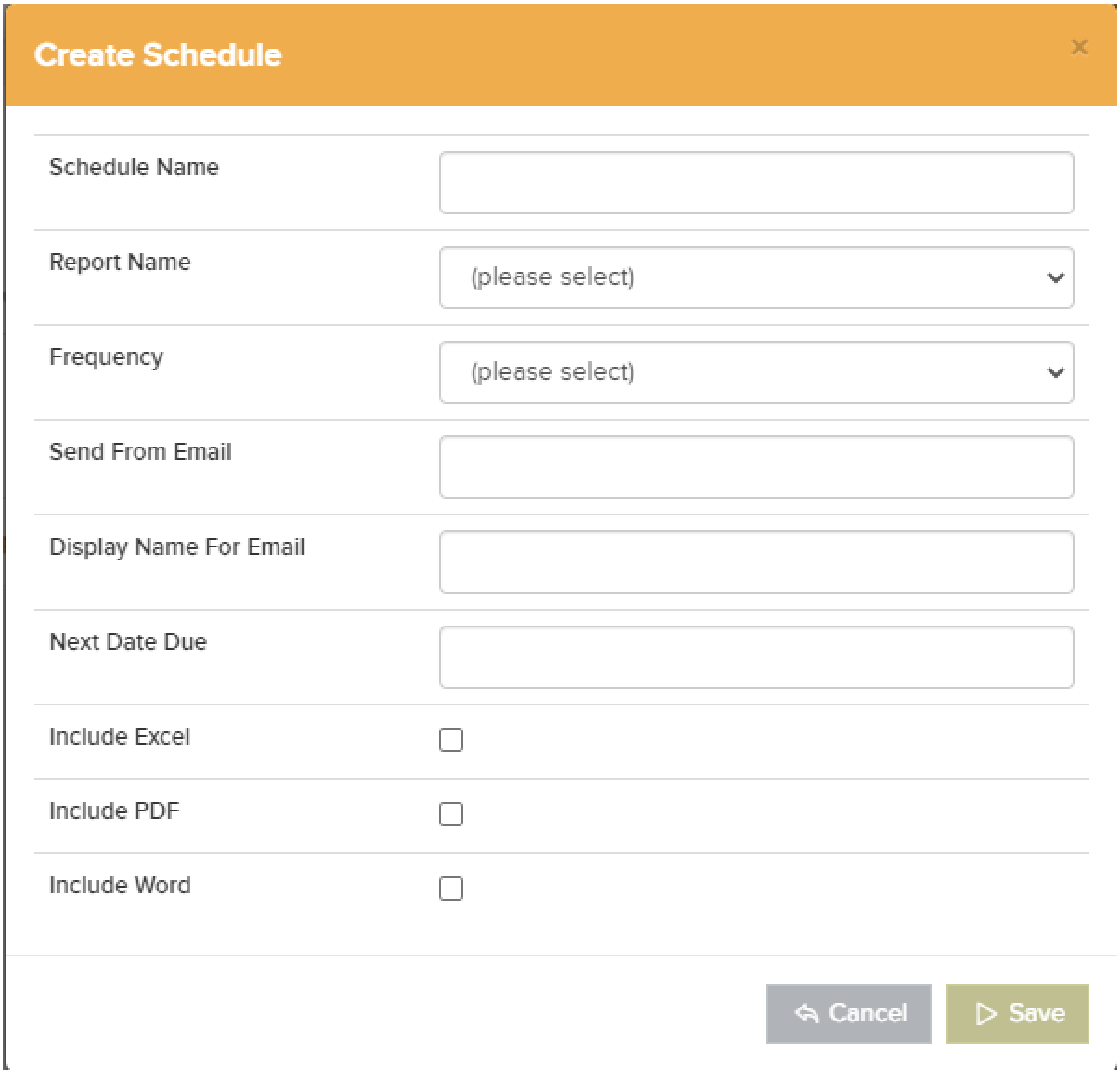
This will prompt the *Edit Report* pop-up window where you can edit the report name, description, type, and user access:

From the main *Reports* list you have the option to *Schedule Reports*:

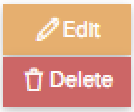
This button will take you to the *Report Schedules* view which will show any report schedules that have already been created.

You can create a new schedule by selecting the *Create Schedule* button to the top-right:

This will prompt the *Create Schedule* pop-up for you to populate with the new schedule information:



Once you click *Save* your new schedule will be created and added to the *Reports Schedules List*. Any schedules in this list can be edited or deleted be selecting either of these buttons:



Add Users who you want to get the Report by clicking the pencil icon in the Users column.