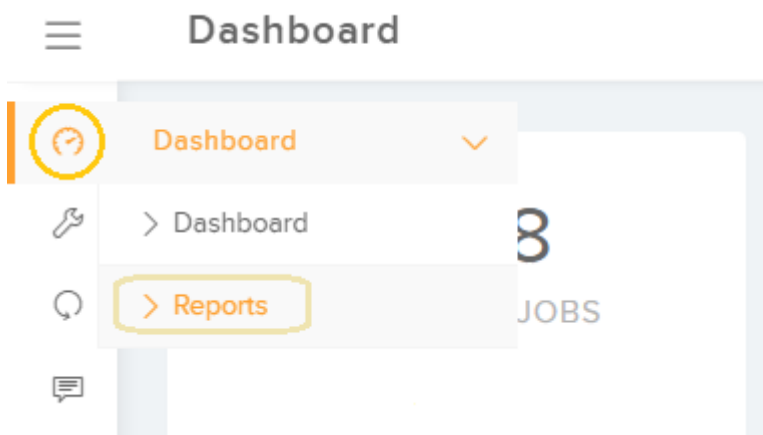


Report Manager

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:

Report Name	Description	Type	User Access	Base Report	
Assets Report - All Columns	Shows all the assets with all columns	Assets	Users With Full Access	Base Report	▶ RUN
Job Cost report Itemised	Shows all completed jobs in this financial year. Costs Itemised.	Job Costs	Users With Full Access	Base Report	▶ RUN
Job Costs Report - All Columns	Job Costs Report - All Columns	Job Costs	Users With Full Access	Base Report	▶ RUN
Job summary with costs and number of resources	Shows Jobs with costs and number of resources created in last 6 months	Jobs	Users With Full Access	Base Report	▶ RUN
Job summary with costs, assets end notes	Jobs completed in this calendar year	Jobs	Users With Full Access	Base Report	▶ RUN
Job Tasks Showing Job Information	Job Tasks - all instructed jobs from last 30 days.	Job Tasks	Users With Full Access	Base Report	▶ RUN
Jobs by Contract - Monthly	Get Jobs By Contract on a Monthly Basis	Jobs	Users With Full Access	Base Report	▶ RUN
Jobs by Contract - Weekly	Get Jobs By Contract on a Weekly Basis	Jobs	Users With Full Access	Base Report	▶ RUN
Jobs Grouped By Site Type	Open Jobs Grouped By Site Type	Jobs	Users With Full Access	Base Report	▶ RUN
Jobs Grouped By Site Type and Open/Closed	Open Jobs Grouped By Site Type and Open/Closed	Jobs	Users With Full Access	Base Report	▶ RUN

Click *Run* next to any report you wish to view. This will run

the report and bring you to the below view.

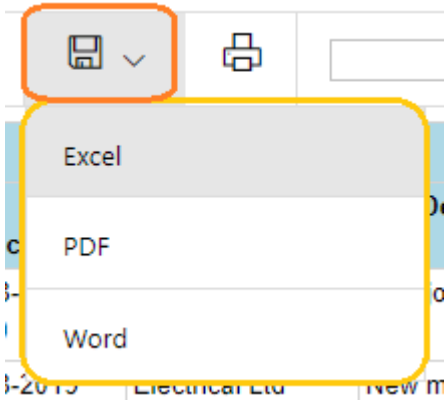
Asset	Class	Sub Class	Status	Contract	Site	Location	SubLocation	Site Type	Region	Asset Number	Serial Number	Model Number	Manufacturer	Capacity / Rating	Service / Category	Depth	Height
09-46	Boilers		Reliable		15-38 Ashbourne	-	-	Distribution Centre	Cardiff	efessfefv							
09-47 test	Other		Out of Service		Aincrad	-	-	Building	Cardiff	abc							
0AA Test	AC Units				Building Chiltern 3	-	-	Client A	Chilterns	A11							

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:



Print



We'll create a printer-friendly PDF version of your report.

Page size:

A4 (210mm x 297mm) ▼

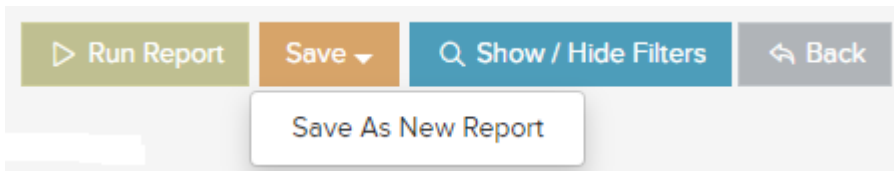
Page orientation:

Portrait ▼

Print

Cancel

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.

Save As New Report [X]

Report Name: Assets Report - All Columns - Apartment 21

Description: Shows all the assets with all columns

Type: Assets

UserAccess: Users With Full Accε

[Cancel] [Save]

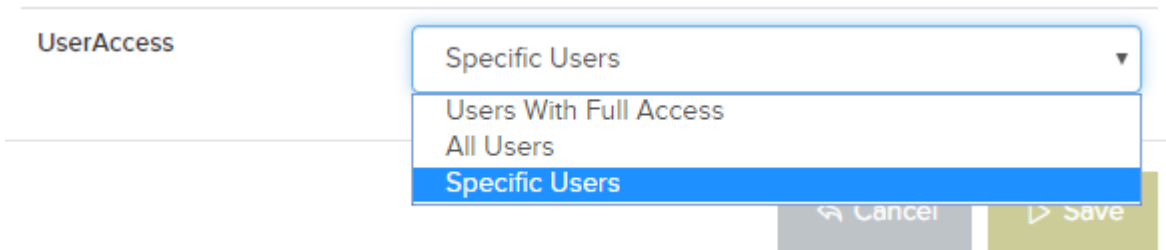
The *Type* drop-down menu will allow you to choose from these options:

Type: Job Tasks

- Job Costs
- Job Tasks
- Jobs
- Planned Maintenance
- Sites

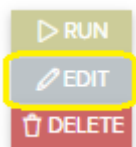
[Cancel] [Save]

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*:

A screenshot of a blue button with a circular arrow icon and the text 'Schedule Reports'.

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

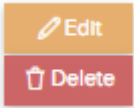
You can create a new schedule by selecting the *Create Schedule* button to the top-right:




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

A screenshot of a 'Create Schedule' pop-up window. The window has an orange header with the title 'Create Schedule' and a close button (X) in the top right corner. The form contains several fields: 'Schedule Name' (text input), 'Report Name' (dropdown menu with '(please select)' and a downward arrow), 'Frequency' (dropdown menu with '(please select)' and a downward arrow), 'Send From Email' (text input), 'Display Name For Email' (text input), 'Next Date Due' (text input), 'Include Excel' (checkbox), 'Include PDF' (checkbox), and 'Include Word' (checkbox). At the bottom right, there are two buttons: a grey 'Cancel' button with a left-pointing arrow and an olive green 'Save' button with a right-pointing arrow.

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 by selecting either of these buttons:



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

Report Schedules List										Back	Create Schedule	...
Schedule Name	Report Name	# Users	Next Date Due	Last Date Sent	Frequency	Excel	PDF	Word				
Darren Schedule Enabled	Jobs Report - All Columns	1 	10/11/2021 12:10	09/11/2021 12:30 Send Now	Daily	No	Yes	No			Edit	Delete

10 Items per page 1 - 1 of 1 Items