Jobs Calendar

Created by: Support Trackplan Modified on: Wed, 10 Jun, 2020 at 3:51 PM

The *Jobs Calendar* shows all upcoming planned and reactive jobs. The *Jobs Calendar* has numerous filters and viewing options to allow you view it in exactly the way you choose:

Calendar					Φ ⁰	+ New	Facilities1 ℓ ∨
Reactive / Planned	Open / Closed	Assigned User	Assigned User Team	Resource	Resource Team		O Moro Eiltoro
Reactive Jobs, Planned J	obs 🗸 🛛 <open closed=""></open>	✓ Assigned To (14) ✓	<all teams=""> 🗸</all>	Resources (23) 🗸	<all teams=""></all>	~	
Site Sites (108) -	Asset Class A <asset class=""></asset>	Assets <asset></asset>	Status Priorit Status (13) - Priorit	ty prity (8) →			
Planned Schedule <planned schedule?="" td="" v<=""><td>Schedule Category <pre>Schedule Category</pre></td><td>Schedule Group <linked group=""></linked></td><td>Compliance Type</td><td></td><td></td><td></td><td></td></planned>	Schedule Category <pre>Schedule Category</pre>	Schedule Group <linked group=""></linked>	Compliance Type				

The Jobs Calendar view can be sorted by Date, Assigned User group, or by Resource:

croup by resigned over croup by resource	Show By Date	Group By Assigned User	Group By Resource
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The Jobs Calendar can also be filtered by day, week, month, agenda week / agenda day:

Search	٩	DAY	WEEK	WORK WEEK	MONTH	TIMELINE	AGENDA	WEEK	AGEN	DA DAY
11:00		4	2.00		12:00		•	14.00		
2369 - blah blsh		1	2.00		13.00			14:00		
				Pest cont	trol and inspect	ion				
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Note that within the monthly view, the calendar will expand to display up to ten jobs. If there are more than ten jobs scheduled for a particular day, you will be able to view all of these jobs by selecting the button highlighted below:

	09
Weekly PPM Checks Site: Head Office	
Weekly PPM Checks	
Meter Readings	
Meter Readings	
Meter Readings Site: Haddenham & Thame	
Meter Readings	
Site: Randstad Education -	

This button will open the daily view which will display all jobs for that day:

	Sat 09/5												
all day													
08:00													
09:00	Weekly PPM Checks Site: Head Office Location: - Assigned: Facilities Mar Resource: Fred Smith Status: Not Created Priority:	. nager	Weekly PPM (Site: Cheadle Location: - Assigned: Faci Resource: Free Status: Not Cre Priority:	C hecks lities Manager I Smith _l ated	Week Site: H Parkwa Locatio Assign Resour Status	dy PPM Checks addenham & Thame ay on: - ed: Facilities Manager rce: Fred Smith : Not Created	Weeky PPM Checks . Site: Kydd Building Location; - Assigned: Facilities Ma Resource: Fred Smith Status: Not Created Priority:	. nager	Weekly PPM C Site: Randstad E Cambridge Location: - Assigned: Facili Resource: Fred Status: Not Crea	hecks Education - ties Manager Smith ated	Weekd Site: Lo Locatio Assigne Resourc Status: Priority:	y PPM Checks ndon Marylebone m:- ed: Facilities Manager ce: Fred Smith Not Created	
11:00	Meter Readings Site: Head Office Location: - Assigned: Robert Cox Resource: Fred Smith	Meter Site: De Locatio Assigne Resour	Readings enham n: - ed: Robert Cox ce: Fred Smith	Meter Reading Site: Haddenha Thame Parkwa Location: - Assigned: Robe	Priority JS am & y ert Cox	Meter Readings Site: Randstad Education - Cambridge Location: - Assigned: Robert Cox	Meter Readings Site: London Marylebone Location: - Assigned: Robert Cox	Meter Site: B Locatio Assign Resour	Priority r Readings uilding No 1 on: - ed: Robert Cox rce: Fred Smith				
13:00	Status: Not Created Priority:	Status: Priority:	Not Created	Resource: Fred Status: Not Cre Priority	Smith ated	Resource: Fred Smith Status: Not Created Priority:	Resource: Fred Smith Status: Not Created Priority:	Status: Priority	Not Created r.	AHU check Site: Ceredigior Hospital Location: -	1	ahu 2 Site: Building No 1 Location: - Asset: Drill	
14:00										Manager Resource: Elect	rical Ltd	Assigned: Facilities Manager Resource: Harold Lloyd Status: Not Created	
15:00													

You can also search the Job Calendar by job number or job details by using the search bar which can be found next to the Day / Week / Month selector:



The Jobs Calendar has a date picker to the top-left of the calendar. The arrows can be used to scroll through the days / weeks / months, or you can use the drop-down date picker to pick a specific date:

TODAY	۹	►	🛗 Ju	ne, 20	20					
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			7	8	9	10	11	12	13	
			14	15	16	17	18	19	20	
			21	22	23	24	25	26	27	15
			28	29	30	1	2	3	4	
			5	6	7	8	9	10	11	22

WEDNESDAY, JUNE 10, 2020

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A new view option for the Jobs Calendar is the Timeline view. The Timeline view will display the hours in the day across the x-axis. If grouping by Assigned User or Resource, the names will be displayed down the y-axis:

Calendar									Ļ	+ New	Facilities1 🛛 🕹 🗸 🗸
③ Drag Jobs Ont	o Calendar From Job List		Show By Date	Group By	Assigned User	Group B	y Resource		_		D PDF
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									tractor		Cito: Duilding N
FMTeam FM Team											
harry smith											
Joe Smith											
lenmac admin											

The selected calendar view can also be exported to a PDF:

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		Q More F	Filters
			PDF
TIMELINE	AGENDA WEEK	AGENDA	A DAY

While viewing the upcoming jobs for a particular month, the Trackplan calendar utilises a highly configurable drag and drop design that allows you to view and modify jobs at the click of a button (**Note**: This cannot be done with planned jobs):

Calendar							ΰo	+ New	Facilities1
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	From Job List		Show By Date	Group By Assigned User	Group By Resource				D PD
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(77	08 2422 - test job Site: Building Mr 2441 - June 202 Site: Cafel Lloor 2442 - Tollet not	09	10 2438 - New Job 2020 te: Ruilding No 1	2385 - eewnwerwer Site: Cerneless & Antinus 2869 - bieh bish Site: Certile View	11 2370 - bo Site: Carr	12 wniass 3 - Pat O'Connell		13
	14	15	Riciness Park 65 - 16	17		18	19		20
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On top of being able to drag and drop jobs across the calendar, you can also drag jobs onto the calendar from the jobs list:

① Drag Jobs Onto Calendar From Job List

This button will open the jobs list at the top of the page:

			Dra	ig jobs from t	he filterable j	ob list onto the	calendar	below using y	our n	nouse and cur	sor					C) Turn Off Dra	g Jobs
Reactive / Reactive	e Only	Expected Date	Site	All Sites>	Team < All Tear	ms> 🗸	·											
ld \downarrow	▼ Details	Т	Job Type	T	Site	T Locatio	n T	Status	Ŧ	Assigned	T Resou	irce 🔻	Priority	T	Expected	Ŧ	Created	T
2445	Toilet not flus	hing	Plumbing drains	E	Building No 1	Floor 1		Pending		Facilities Ma	nager		No priority				10/06/2020	
2442	Toilet not wo	rking		c	Calmount Busin	ess P		Pending		Joe Smith			Urgent		09/06/2020)	08/06/2020)
2441	June 2020			(Cefni Hospital	ground	floor	Instructed Quate Approved		Joe Smith	Multip	ıle (3)	No priority		09/06/2020	0	03/06/2020)
2439	New Job 202	20		E	Building No 1			Instructed			Fred	Smith					02/06/2020)
2438	New Job 202	20		E	Building No 1			Instructed		harry smith	Fred	Smith			24/06/2020)	02/06/2020)
н н	1 2 3 4	567	8 9 10		⊨ 5 ⊤	items per pag	e										1 - 5 of 497	items

From here you can click and drag any of these jobs onto the Calendar:

2441	June 2020	Cefni Hospital	ground floor	Instructed Quote Joe S Approved	Smith Multiple (3)	No priority	09/06/2020 0	3/06/2020
2439	New Job 2020	Building No 1	139 New Job 2020	tec	Fred Smith		0	2/06/2020
н	1 2 3 4 5 6 7 8	9 10 ▶ ⊮ 5 v items	per page					1 - 5 of 496 items
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		Show By Date Group By Assigned Us	er Group By Reso	ource				PDF
TODA	Y 4 • 01/06/2020 - 05/06/2020		Se	earch Q	DAY WEEK WORK WEEK	MONTH TIMEL	INE AGENDA WEEK	AGENDA DAY
	Mon 01/6	Tue 02/6	Wed 03/6		Thu 04/6	Fri	05/6	
all day								
08:00								
09:00								
10:00								
11:00								
1:00								

2441	June 2020	Cefni Hospital gr	ound floor	Instructed Quote Joe Smi Approved	th Multiple (3)	No priority	09/06/2020 03/06/2020
2439	New Job 2020	Building No 1		Instructed	Fred Smith		02/06/2020
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10:00			<u> </u>)			
11:00							

TODA	AY a	•	(⁺⁺ ■ 01/06/2020 - 05/06/2020			Search	Q D	AY WEEK	WORK WEEK	MONTH
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all day										
08:00										
09:00					2439 - New Jo Site: Building I	ob 2020 No 1				
10:00					Location: Assigned: Resource: Free	d Smith				
11:00					Priority:	lea				
12:00										
13:00										

When you are done, select Turn Off Drag Jobs at the top-right of the page:



Related Articles:

Jobs List (https://trackplanfm.freshdesk.com/support/solutions/articles/47000453969)

Reactive Jobs (https://trackplanfm.freshdesk.com/support/solutions/articles/47001040014)

Planned Jobs (https://trackplanfm.freshdesk.com/support/solutions/articles/47001040017)

Job Requests (https://trackplanfm.freshdesk.com/support/solutions/articles/47000454015)

S Support is the author of this solution article.