Report Builder Module

EPM Connect Guide

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Report Builder Module Guide

Enhance your decision-making with the power of data-driven analytics by creating customised reports to elevate your reporting procedures. With real-time insights, you can thoroughly examine the factors behind variances, trends, and anomalies that may warrant additional investigation.

Each module within EPM Connect includes a number of standard reports. However, we understand there may be time when you need a report that's a little more bespoke. The Report Builder module allows you to create customised reports and store these within the location of your choice for future use. It's also great for last minute data requests.

View List of Standard Reports

1. On the left-hand side of the EPM Connect window, select **Report Builder**. A list of further menu options is displayed.
2. Select **Reports**. The Reports page is displayed and a list of all current standard reports displayed.

Create Customised Reports

Report Builder allows you to create custom reports, to provide you with exactly the data you need.

1. On the left-hand side of the EPM Connect window, select **Report Builder**. A list of further menu options is displayed.
2. Click **Reports**. The Reports page is displayed and a list of all current standard reports displayed.
3. Click the **+ Add Report** button.

4. In the **Title** field, enter a title.
5. From the **File Prefix** drop-down menu, select an option.
6. From the **Format** drop-down menu, select **Excel**.
7. From the **Download Locations** drop-down menu, select an option.

   This will determine which area of the system the reports can be accessed.

8. From the **Type** drop-down menu, select an option.

   Type determines the module and related fields available. This will determine which area of the system the reports can be accessed.

Column

Click the column title followed by the relevant arrow to add, remove or change the order of the columns.

 Click the right arrow to select the field you wish to add to the report.

 Click the left arrow to remove the field.

 Click the up arrow to move the field up in order.

Click the down arrow to move the field down in order.

Employee Filters

Employee filters allow you to further filter the reports you create, for example limiting the data to only permanent staff, or employees within a certain department.

1. From the **Departments** drop-down menu, select an option.
2. From the **Genders** drop-down menu, select an option.
3. From the **Job Categories** drop-down menu, select an option.
4. From the **Role Identifiers** drop-down menu, select an option.
5. From the **Contract Agreement Types** drop-down menu, select an option.
6. From the **Reports To** drop-down menu, select an option.
7. Click **Save** to finish.
   Save

View, download and edit reports

1. On the left-hand side of the EPM Connect window, select Report Builder. A list of further menu options is displayed.
2. Click **Reports**. The Reports page is displayed and a list of all current standard reports displayed.
3. Find the report you wish to view.

   Click on the magnifying glass icon to search in the selected column.

   Click on a highlighted column heading to sort alphabetically or numerically. Click again to switch between ascending/descending order.

4. Select an icon on the right-hand side of the report.

   Click the pencil icon to edit the report.

   Click the red cross to delete the report.

   Click the download icon to download the report.

To download the report

1. Select the download icon next to the report you wish to download. A new page is displayed.
2. Scroll down and click the download button.
   Download

To delete the report

1. Select the cross icon next to the report you wish to delete. A new window is displayed.
2. Scroll down and click the delete button.
   Delete

To edit the report

1. In the **Title** field, edit the title.
2. From the **File Prefix** drop-down menu, select an option.
3. From the **Format** drop-down menu, select **Excel**.
4. From the **Download Locations** drop-down menu, select an option.

   This will determine which area of the system the reports can be accessed.

5. From the **Type** drop-down menu, select an option.

   Type determines the module and related fields available. This will determine which area of the system the reports can be accessed.

Column titles

Click the column title followed by the relevant arrow to add, remove or change the order of the columns.

 Click the right arrow to select the field you wish to add to the report.

 Click the left arrow to remove the field.

 Click the up arrow to move the field up in order.

 Click the down arrow to move the field down in order.

Employee Filters

Employee filters allow you to further filter the reports you create, for example limiting the data to only permanent staff, or employees within a certain department.

1. From the **Departments** drop-down menu, select an option.
2. From the **Genders** drop-down menu, select an option.
3. From the **Job Categories** drop-down menu, select an option.
4. From the **Role Identifiers** drop-down menu, select an option.
5. From the **Contract Agreement Types** drop-down menu, select an option.
6. From the **Reports To** drop-down menu, select an option.
7. Click **Save** to finish.

   

Templates

For support in using this area, please contact your Account Manager, who will be happy to talk you through the process in more detail.

Available Fields

For support in using this area, please contact your Account Manager, who will be happy to talk you through the process in more detail.

Trust Overview

The Reports area of the Trust Overview mirrors the **Report Builder** module. Therefore, select the **Trust Overview** module and **Reports** and follow the guide above.