

# ePM Quick Reference Guide #136

## ePMXpress Reports



### WHAT IS...

ePMXpress reports allow users to retrieve specific information on ePMXpress projects. There are two types of reports available in ePMXpress.

- Standard Reports have pre-selected fields that appear on every report.
  - Cuff Record Report displays the Latest Project Estimate, Funding Summary, and Obligation Details that are entered in ePMXpress
  - Project Summary is a fact sheet that displays basic project information including Project Details, Location, Status, Team, and Schedule
- My Reports is an ad-hoc reporting tool where the user can build reports based on Data Groups, Columns, and Filter selection sets.

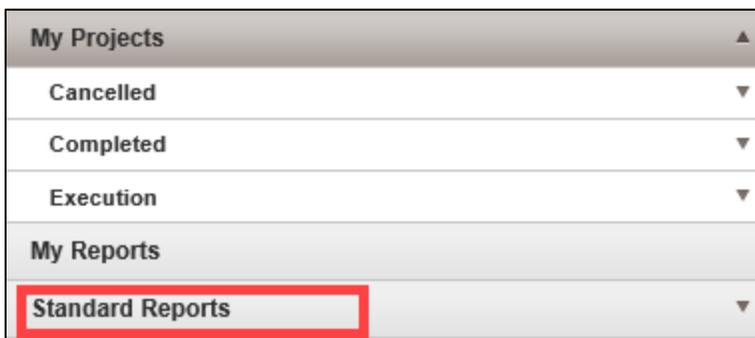
### WHO USES...

- Program Manager and Staff
- Project Manager and Staff

### HOW TO...

#### A. STANDARD REPORTS

1. Log in to ePMExpress.
2. In the left menu, click Standard Reports.



3. From the list of reports, choose the report that you would like to view.



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- For the Cuff Record and Project Summary reports, once the Select Project window opens, enter the project number or project name that you would like to view in the Search box.
  - Click 'Find'.



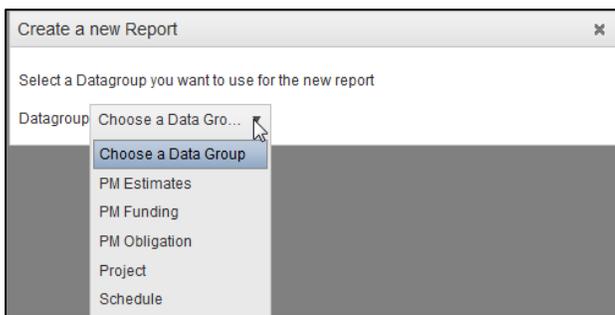
- Select the appropriate project from the list.
- The report will open in a new window.

## B. MY REPORTS

- In the left menu, click 'My Reports'.



- Click 'New' to open the "Create a New Report" window.
- Select a Datagroup you want to use for the report: PM Estimates, PM Funding, PM Obligation, Project, or Schedule.



- Enter a name for the report.

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5. Put a checkmark in the “Make this report public” box if you’d like to share it with other users.
6. Begin selecting columns for the report by clicking ‘New’.
7. Choose the Document, Field, Title (if necessary), and Sort Direction.
8. Re-arrange the order of the columns by highlighting a row and clicking the Up or Down buttons.

Document	Field	Title	Sort Direction
Project	Building Number	Building Number	A-Z/0-9

9. Delete unneeded columns by highlighting a row and clicking ‘Delete’.
10. In the Filters section, choose a Document, Field, Operator, and Value.

**NOTE:** To filter by region use 4 digits for the region number: (For Region 5, use Program Region = R0005)

Use the operator “Like” with the % symbol to filter by part of a term. For example, to filter by the Funds in Place milestone: (Schedule Activity/Milestone Task like %Funds%)

11. Click ‘Save & Run’.

### C. MY REPORTS (AD HOC) FILTERING METHODS

Since filters are the backbone of ad hoc reporting, it is important to the success of the output to understand how operators function in the filtering process. There are three different types of operators that are available: Logical Operators, Comparison Operators, and Advanced Comparison Operators. Each row added to the ‘Filter’ grid is referred to an ‘Expression’.

#### **Logical Operators**

Logical operators define the relationship between consecutive expressions (column filters) on the design board. When multiple expressions are used, you must identify the following expressions that refer to the previous statement. These consist of ‘AND’ and ‘OR’. If the relationship between the two expressions is inclusive then ‘AND’ is required. If the expressions are separate then OR is required. Grouping brackets are required between the AND/OR operators.

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Operator & Grouping Brackets	Definition
AND	Must meet all the criteria – inclusive, acts like a single expression
OR	Criteria can meet either expressions

Example: This example uses wildcards with the AND operator. The ad hoc report result will display all Projects containing the Program Description value of “Small” AND for projects within that program created equal to or greater than the Creation Date of “1/1/2013”.

Filter					
New		Delete			
AND/OR	(	Document	Field	Op	Value
		Program	ePM Program #	like	%Small%
AND		Project	Creation Date	>=	1/1/2013

### Comparison Operators

Comparison operators define the way in which record filters compare data to the value added to the expression. A filter is true for a project record if the column data relates to the expression’s value in the way the comparison operator specifies.

Operators	Definition
=	Equals
<>	Not equal to
>	Greater than – or – ‘After’ in a non-numeric series
<	Less than – or – ‘Before’ in a non-numeric series
<=	Less than or equals – or – ‘At or Before’ in a non-numeric series
>=	Greater than or equals – or – ‘At or After’ in a non-numeric series
Like	Pattern matching using wildcard values %value% - Represents any number of characters, including zero characters (i.e. %small% to see anything with the value “small” in the selected field)

EXAMPLE: This example uses wildcards and comparison expressions with the ‘AND’ operator groupings.

The report returns all projects in capital programs and with a Contracting Officer’s name containing the letters ‘Sm’.

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Filter					
New		Delete			
AND/OR	(	Document	Field	Op	Value
		Program	ePM Program #	like	%capital%
AND		Project	Contracting Officer	like	%sm%

**Note:** Use ‘%’ at the beginning and end of the value to filter for a condition containing any of those combined characters. The last expression in the above example does not include a wildcard at the end of the value. This means the Project Manager value must contain ‘Sm’.

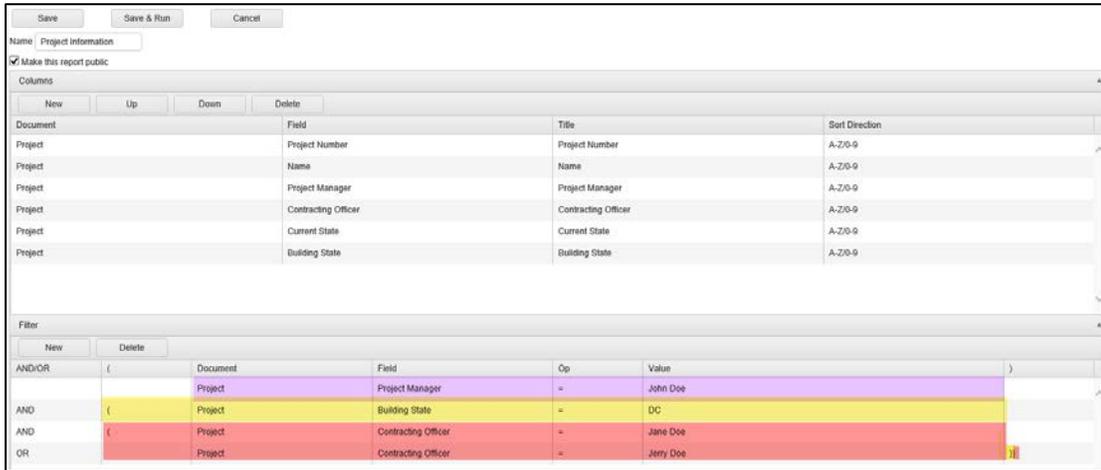
ePM Program #	Name	Contracting Officer
R0004Capital	GA-ATLANTA-ELBERT P. TUTTLE US-COA Emergency Generator Connection	Leslie Smalls
R0004Capital	GA-ATLANTA-M. L. KING JR. FB-HHS - OMHA	Leslie Smalls
R0011Capital	DC-Washington-1800 F Street FB-R&A	Chrischanda Smith
R0011Capital	DC-Washington-FDIC-HVAC Retrofit	Chrischanda Smith
R0011Capital	DC-Washington-Harry S Truman Modernization Phases Phases 1A, 1B, 2 (Financials)	Chrischanda Smith
R0011Capital	DC-Washington-Sidney Yates-USDA Forest Service Consolidation	Chrischanda Smith
R0011Capital	DC-Washington-Stuart Lee Udall FB (DOI Main)-Modernization	Chrischanda Smith

### Nested Expressions

Use Grouping Brackets “(“.... *inserted rows of expression with operators*..... “)” to open and end multiple expressions with various or multiple operators. Grouping Brackets are necessary ONLY if wanting to query a “grouped” set of data for a very specific condition.

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Color	Explanation
Purple	This highlighted row is a standalone expression querying data for Project Manager Adebola Adejobi
Yellow	This highlighted row includes an AND operator and begins a grouping bracket for the proceeding nested expression. So far, the filter is looking for conditions of both Project Manager 'Adebola Adejobi' AND has a Building State of 'OH' AND a "(" starting the grouped bracket for the proceeding nested expression.
Pink	This highlight furthermore includes the "Nested" expression filter within the initial expressions in purple and yellow highlights. In addition to Project Manager = 'Adebola Adejobi' and Building State = 'OH', the nested expression furthermore is filtering a condition with the OR operator of either Johanna Nieves OR Roger Schulte as the Contracting Officer.  At the end of the last row in the grid, two closing brackets are necessary to close the yellow highlight expression in addition to the pink highlighted nested expression.

Project Number	Name	Project Manager	Contracting Officer	Current State	Building State
26489	OH-CINCINNATI-JOHN WELD PECK-SSA 2nd Floor Painting Project	Adebola Adejobi	Roger Schulte	Execution	OH
30742	OH-CINCINNATI-POTTER STEWART U.S.-Circuit Clerks Office Alterations	Adebola Adejobi	Roger Schulte	Completed	OH
33046	OH-COLUMBUS-BRICKER FEDERAL BLDG-SSA Data Cabling Columbus DTN	Adebola Adejobi	Johanna Nieves	Completed	OH
37809	OH-COLUMBUS-BRICKER FEDERAL BLDG-Replace Fire Alarm and Notification System	Adebola Adejobi	Roger Schulte	Execution	OH

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### D. MY REPORTS EXAMPLES

The example below shows how to generate a Project report filtered to only include small projects in Region 6 with the Project Number, Name, Current State, Project Manager, Address, and ASID/RWA number of all projects in Region 6.

Save Save & Run Cancel

Name

Make this report public

Columns

New Up Down Delete

Document	Field	Title	Sort Direction
Project	Project Number	Project Number	A-Z/0-9
Project	Name	Name	A-Z/0-9
Project	Current State	Current State	A-Z/0-9
Project	Project Manager	Project Manager	A-Z/0-9
Project	Building Address	Building Address	A-Z/0-9
Project	Building City	Building City	A-Z/0-9
Project	Building State	Building State	A-Z/0-9
Funding	ASID / RWA#	ASID / RWA#	A-Z/0-9

Filter

New Delete

AND/OR	(	Document	Field	Op	Value
		Program	Region	=	R0006

Excel Close Edit Print

Drag a column header and drop it here to group by that column

Project Number	Name	Current State	Project Manager	Building Address	Building City	Building State	ASID / RWA
17919	MO-St Louis-RAY FB-Seismic Renovation Project	Active	Matthew Meeks	1222 SPRUCE	ST LOUIS	MO	
20146	KS-KANSAS CITY- ROBERT J. DOLE US CT- DoleAirInfiltrationImp	Active	Joshua Trader	500 STATE AVENUE	KANSAS CITY	KS	
20146	KS-KANSAS CITY- ROBERT J. DOLE US CT- DoleAirInfiltrationImp	Active	Joshua Trader	500 STATE AVENUE	KANSAS CITY	KS	RKS00073
20146	KS-KANSAS CITY- ROBERT J. DOLE US CT- DoleAirInfiltrationImp	Active	Joshua Trader	500 STATE AVENUE	KANSAS CITY	KS	RKS00073
20146	KS-KANSAS CITY- ROBERT J. DOLE	Active	Joshua Trader	500 STATE AVENUE	KANSAS CITY	KS	RKS00073

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The example below shows how to generate a Project report with the project number, name, schedule milestone/task, baseline start date, and estimated start date for all small projects in Region 1.

Save
Save & Run
Cancel

Name

Make this report public

Columns

New
Up
Down
Delete

Document	Field	Title	Sort Direction
Project	Project Number	Project Number	A-Z/0-9
Project	Name	Name	A-Z/0-9
Schedule	Activity Milestone/Task	Activity Milestone/Task	A-Z/0-9
Schedule	Baseline Start Date	Baseline Start Date	A-Z/0-9
Schedule	Start Date	Estimated Start Date	A-Z/0-9

Filter

New
Delete

AND/OR	(	Document	Field	Op	Value
		Program	Region	=	r0001
AND		Program	Name	like	%small%

Excel
Close
Edit
[Print](#)

Drag a column header and drop it here to group by that column

Project Number	Name	Activity Milestone/Task	Baseline Start Date	Estimated Start Date
13269	CT-Hartford-Ribicoff FBCT-USDC - Audio Visual Upgrade	Prime Contract Award	01/14/2012	01/17/2012
13269	CT-Hartford-Ribicoff FBCT-USDC - Audio Visual Upgrade	Substantial Completion	06/17/2012	06/19/2012
13270	CT-Hartford-Ribicoff FBCT-USDC - Infrastructure Upgrade	Construction Start / Notice To Proceed	01/14/2013	01/16/2013
13270	CT-Hartford-Ribicoff FBCT-USDC - Infrastructure Upgrade	Customer Request	09/19/2011	09/19/2011
13270	CT-Hartford-Ribicoff FBCT-USDC - Infrastructure Upgrade	Funds in Place	09/27/2011	09/27/2011
13270	CT-Hartford-Ribicoff FBCT-USDC - Infrastructure Upgrade	PM Schedule	09/19/2011	09/19/2011
13270	CT-Hartford-Ribicoff FBCT-USDC - Infrastructure Upgrade	Substantial Completion	09/24/2013	09/26/2013
13271	CT-Hartford-Ribicoff FBCT-USDC - Library Data Room	[Rename Project Short Name] - Milestone Schedule	04/28/2011	02/28/2011

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The example below shows how to generate an RWA report for a single project that displays the project name, ASID / RWA#, Amount, Less GSA Overhead, Less GSA Regional Mgmt Fee, and Available Amount.

Save
Save & Run
Cancel

Name

Make this report public

Columns

New
Up
Down
Delete

Document	Field	Title	Sort Direction
Project	Name	Name	A-Z/0-9
Funding	ASID / RWA#	ASID / RWA#	A-Z/0-9
Funding	Amount	Amount	A-Z/0-9
Funding	Less GSA Overhead	Less GSA Overhead	A-Z/0-9
Funding	Less GSA Regional Mgmt Fee	Less GSA Regional Mgmt Fee	A-Z/0-9
Funding	Available Amount	Available Amount	A-Z/0-9

Filter

New
Delete

AND/OR	(	Document	Field	Op	Value
		Project	Project Number	=	38749

Drag a column header and drop it here to group by that column						
Name	ASID / RWA#	Amount	Less GSA Overhead	Less GSA Regional Mgmt Fee	Available Amount	
MD-BALTIMORE-G H FALLON FED BLDG-Multiple DOT Buildout	N1538940	1,320,928.53	24,357.86	49,868.10	1,246,702.57	
MD-BALTIMORE-G H FALLON FED BLDG-Multiple DOT Buildout		546,960.00			546,960.00	
MD-BALTIMORE-G H FALLON FED BLDG-Multiple DOT Buildout	N1562259	436,888.05	14,215.10	16,256.65	406,416.30	
MD-BALTIMORE-G H FALLON FED BLDG-Multiple DOT Buildout	N1563041	401,944.44	13,698.69	14,932.53	373,313.22	
MD-BALTIMORE-G H FALLON FED BLDG-Multiple DOT Buildout		114,720.00			114,720.00	
MD-BALTIMORE-G H FALLON FED BLDG-Multiple DOT Buildout		93,400.00			93,400.00	