

# APCM Lunch & Learn: Generating Reports

## Session Q&A:

### **Can you save reports as your favorites?**

The page(s) where a report is generated can be saved within the My Pages menu in APCM.

### **Can the report list the item codes in numerical order?**

There are options to export report data through the Dashboard where it can be sorted as needed.

### **Will the Tableau release include ALL of the existing web-based reports and the output formats currently available through the SiteManager web portal? (reference SiteManager - Report Server (Production))**

Tableau will not include all existing SiteManager web-based reports or output formats. Most contract/project-level reports (currently accessed via macro-enabled Excel files on the CISD Reports page) will move to the APCM interface. Some state or district-wide reports will be released as Tableau dashboards for cross-project analytics and summaries. Output formats may vary by report. Access paths will differ: APCM for contract/project level daily work; Tableau for broader analytics. The plan may adjust slightly as production features are finalized.

### **Are the over/under run reports available?**

Yes, it was referenced in the demonstration.

**If you don't set parameters, does the report run for the entire project duration?**

It will depend on the report being generated.

**Will the Tableau reports include only data through the previous day? For example, ERP Tableau reports don't include things that happen during the current day.**

The refresh rate for an existing report was used as the base requirement for the development of the new report. So, if an existing Tableau report is refreshed to include the previous day, the new report will do the same. If you have a specific requirement, please send an email to [CST\\_Training@txdot.gov](mailto:CST_Training@txdot.gov) with your request.

**Is there an item history report?**

The list of reports for APCM includes an Item History Report, Milestone Summary report and many others that are currently used.

**Is a version of the MMS item history report available?**

This report is currently under development and is expected to be available in the PRODUCTION environment during the District roll out.

**Will the expanded item history report still be available?**

The report is included in the APCM report list.

**Can you show us the material deficiency report?**

This report is under development. Updates will be provided to users once it is available.

**Is the Installed Item Report going to be available?**

Yes, this report is expected to be available in the PRODUCTION Environment.

Updates will be provided to users once it is available.

**Is there an option to refresh an exported report or do we have to run them every time?**

Exported reports will require a new generation to capture current data.

**Will there be a contractor report bundle option?**

Yes, this is expected to be available in the PRODUCTION Environment. Updates will be provided to users once it is available.

**Will all current reports (over 80) remain accessible?**

Yes, most reports will be available in some form. If you are looking for a particular report, the relevant data may be accessed by filtering a broader report or may now be available in Tableau, PDF or Power BI report instead of an Excel worksheet.

**Will we be able to build/filter a report and save it to our dashboard and just click refresh?**

At this time, I am not aware of this functionality being available. Any updates will be shared with users.

**Will you be providing an on-line APCM manual?**

An on-line APCM manual will be made available once the development of the system is complete.

**What about the MSL? Material Sourcing Letter? Where would you find it?**

This report is under development. Updates will be provided to users once it is available.

**For material deficiency report will you be able to drill down and see who has not entered testing?**

This report is still in production and will be reviewed once it is complete. This report will function similarly to the existing SiteManager report.

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Some questions were addressed during the recorded APCM Lunch and Learn Training session. This recording is available internally on Crossroads and externally on the APCM Resource page at [TxDOT.gov](https://www.txdot.gov). Questions submitted that could not be covered during the live session or immediately afterward have been addressed in this document. All responses were provided by the Construction Division's Training and Development team to ensure accuracy with current APCM status.

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