▲ APPEX360

Plant Excellence Intelligence Platform

Executive Guide

How to generate, customise, and export executive reports from APPEX360. Covers Category Reports, custom report builder, and board-ready PDF exports.

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APPEX360 Knowledge Centre

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Executive Reports Guide

How to generate, customise, and export executive reports from APPEX360. Covers Category Reports, custom report builder, and board-ready PDF exports.

1. Overview

Purpose
Executive Reports give you the power to generate custom reports from your APPEX360 intelligence data. Use them to prepare board packs, share findings with stakeholders, and track strategic initiatives.

Who should use it
Executives, plant directors, and operations leaders who need custom reporting beyond the standard Boardroom view.

Expected outcome
After reading this guide you will be able to generate category-specific reports, use the report builder to customise content, export professional PDFs, and schedule recurring reports.

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2. Quick Start

☐ Navigate to Reports from the left navigation menu.
☐ Select a Category Report from the list.
☐ Apply filters to focus the report on specific time periods or business units.
☐ Choose your output format — PDF or interactive view.
☐ Click "Generate Report".
☐ Download or share the finished report.

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3. Detailed Walkthrough

Category Reports

Category Reports provide deep-dive analysis for a single assessment category. Each report includes:
Category score with trend history
Question-by-question breakdown

Strength and weakness identification
Benchmark comparison against industry peers
Recommended actions

To open a Category Report, navigate to Reports and select a category from the list. The report loads with the latest data.

Custom Report Builder

The Report Builder lets you create reports with specific content. Select which sections to include, choose the time period, and add context notes.

Available sections:
Executive Summary — headline metrics and key findings
Category Breakdowns — scores and trends for selected categories
KPI Performance — key performance indicators with charts
Benchmarking — industry comparison data
Recommendations — AI-generated action items
Appendices — supporting data and methodology

Apply filters before generating to narrow the scope. Filters include time period, business unit, and assessment type.

Export and Distribution

Click "Export PDF" to generate a professional, board-ready document. The PDF includes:
Cover page with report title and date
Table of contents
All selected sections with charts and tables
Page numbers and headers

Reports can also be shared via email directly from the platform. Enter recipients and add a message — the system attaches the PDF automatically.

Scheduled Reports

For recurring reporting needs, set up a schedule:
Weekly — Friday afternoon summary for leadership review
Monthly — End-of-month comprehensive report
Quarterly — Strategic review pack for board meetings

Each scheduled report is generated automatically and delivered by email to designated recipients.

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4. Best Practices

Start with Category Reports. They provide the most focused analysis for specific areas of interest.

Use the Report Builder for board packs. Combine multiple categories into a single comprehensive document.

Schedule regular reports. Weekly reports keep the leadership team informed without manual effort.

Add context notes. The Report Builder lets you include commentary alongside the data. This helps readers interpret the numbers.

Review benchmark data. Industry comparisons add valuable context to your internal scores.

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5. Common Mistakes

Generating reports without filters. Unfiltered reports include all data, which can be overwhelming. Apply filters to focus the content.

Not scheduling recurring reports. Manual generation is time-consuming. One-time setup of scheduled reports saves effort over time.

Ignoring benchmark comparisons. Your scores mean more when compared against industry peers. Always include benchmarking sections.

Exporting without reviewing. Preview the report before exporting. Check that all sections display correctly and filters are applied.

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6. Troubleshooting

Report shows no data: Verify that assessments are completed in the selected category and time period.

PDF export fails: Check your browser pop-up settings. Allow pop-ups for your APPEX360 domain.

Scheduled report not delivered: Verify recipient email addresses. Check spam folders for the delivery email.

Report Builder missing sections: Some sections require specific data. Complete assessments in the relevant categories first.

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7. Related Features

Boardroom Guide — visual reporting across all categories.
Executive Snapshot — one-page PDF summary for quick distribution.
APPEXi Guide — AI-powered diagnostic reports.
Assessment Guide — understanding the data behind your reports.
Administrator Guide — managing report templates for your organisation.

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8. Frequently Asked Questions

How often can I generate reports?
Unlimited. There is no limit on report generation.

Can I edit a report after export?
Reports are exported as static PDFs. To make changes, adjust your filters and regenerate.

Who receives scheduled reports?
You control the distribution list. Add or remove recipients from the schedule settings.

Are reports confidential?
Yes. Reports contain your organisation's data. Distribution is controlled by user permissions. Recipients must have valid login credentials to access the platform.

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