One Mortgage System

How to use the OMS reporting suite.

Introduction

- OMS understands that every business is going to have very different and very specific requirements when it comes to MI and so we built the OMS reporting suite.
- The OMS reporting suite allows us to be more agile in dealing with report requests. Instead of needing to fit reports around other developments, which can delay required releases, the OMS support team can build and deploy them on the fly.
- The reporting suite comes with a range of features, including:
  - Exporting reports e.g. to PDF, Excel, etc.
  - Report subscriptions that can be emailed at times needed.
  - Custom access levels so staff only see what you want them to
- Reports are real-time and pull from the same database as the OMS portal, so you be confident the information is accurate.
- The reporting suite comes included within the OMS subscription.

How to Access

- Like the OMS portal, the OMS reporting suite is wholly web-based so it requires an internet connection to access.
- The URL for the OMS reporting suite is http://reports.omsreports.co.uk/reports/browse/
- You will need a username and password to login once you follow the link above.
- If you haven't received login details, please contact the OMS support team.
- While the reporting suite is included in the OMS subscription fee, reporting suite access is not set-up unless requested.

- To request a new report, please email a detailed specification to support@omsystem.co.uk
- If possible, sending an example of what you require is helpful e.g. a spreadsheet with the info required or PDF with the report format.
- The team will then come back to with any questions and timescales for having this live.

User Access

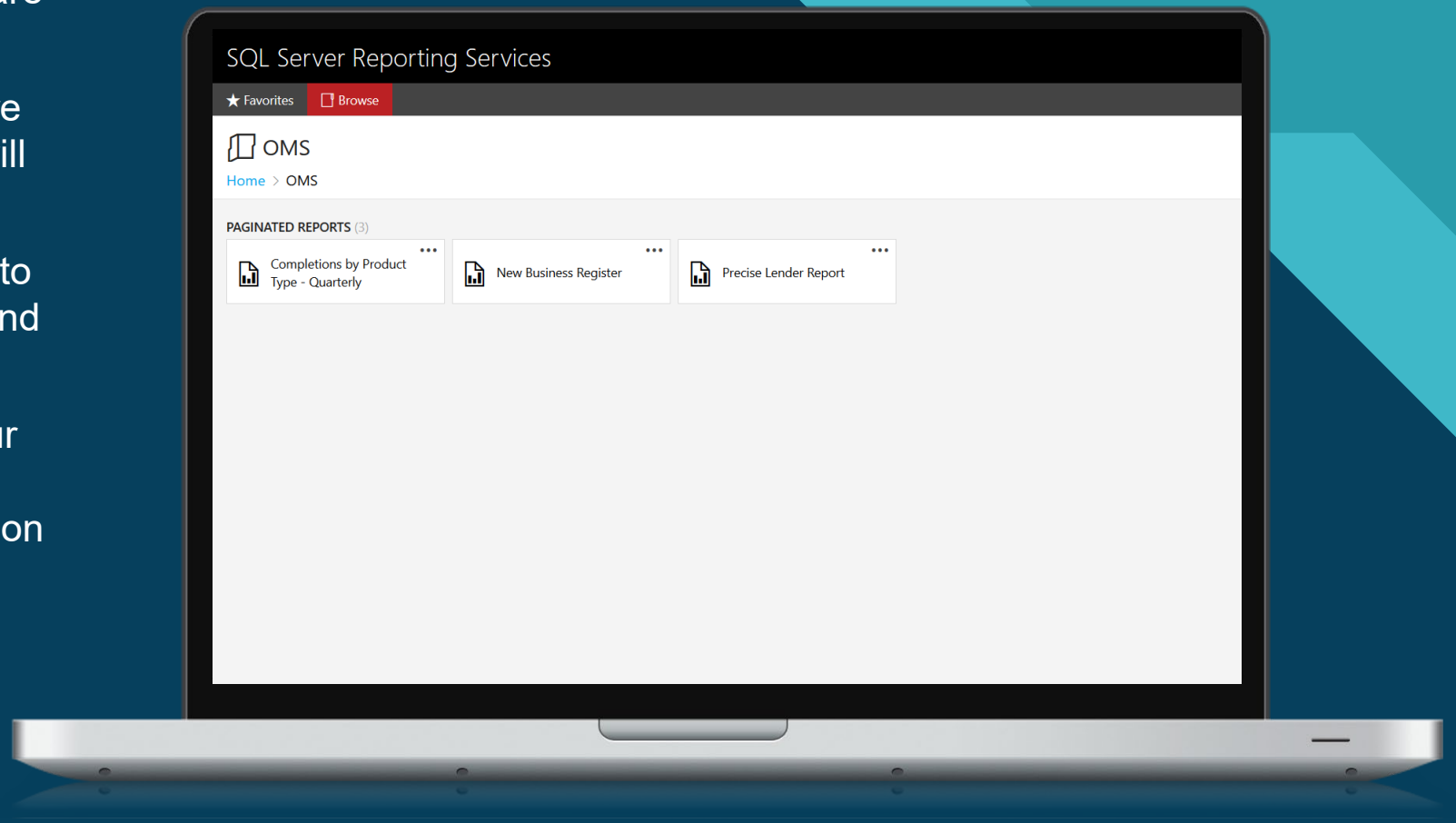
- You may want to provide members of staff access to the reporting suite, but not provide access to all reports available.
- The OMS reporting suite allows for each user to have report-specific access, so you can show them as many or as few reports as you like.
- If you wish to give someone access to the reporting suite, please email the OMS support team with their details.

Structure

- The reporting suite allows for reports to be organized into subfolders similar to your desktop file explorer.
- In addition to being able to provide report access per user as above, you can also provide folder specific access, making managing report permissions much simpler.

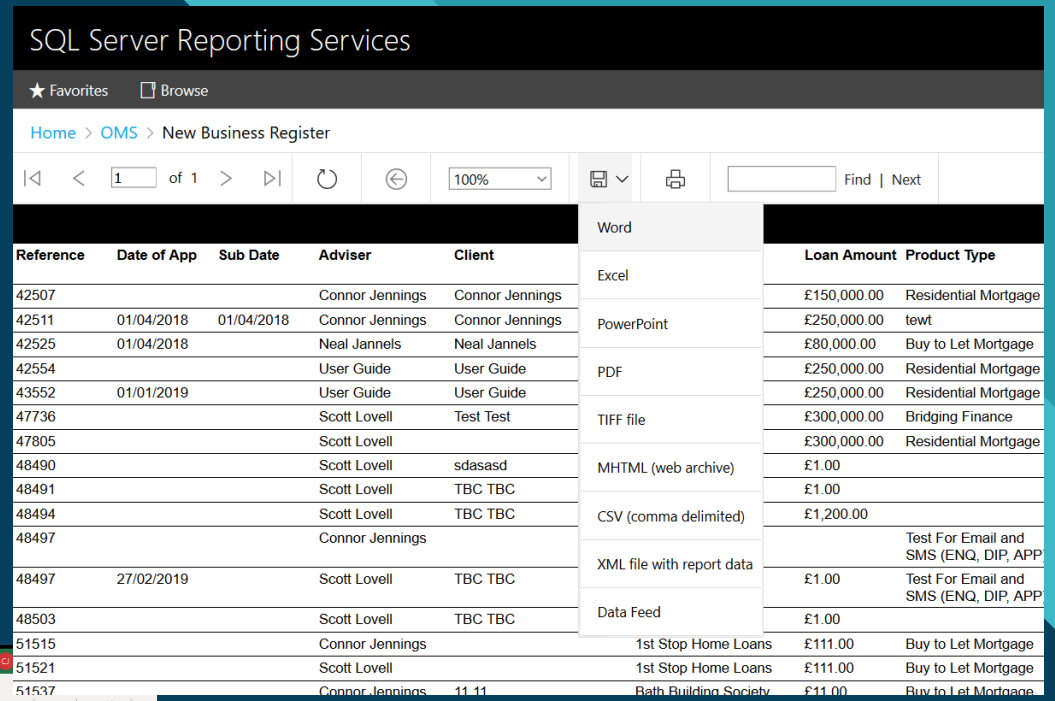
Running Reports

- Once you've logged in to the reporting suite, select the report you want from the reports shown. Depending on how your reports are organised it might be inside a folder.
- If the report has no parameters (these are explained later in this guide) the report will load automatically.
- If the report has parameters, you'll need to complete these first, then on the right-hand side click the view report button.
- Depending on the amount of data on your report it may load across multiple pages. You can navigate using the page arrows on the toolbar.

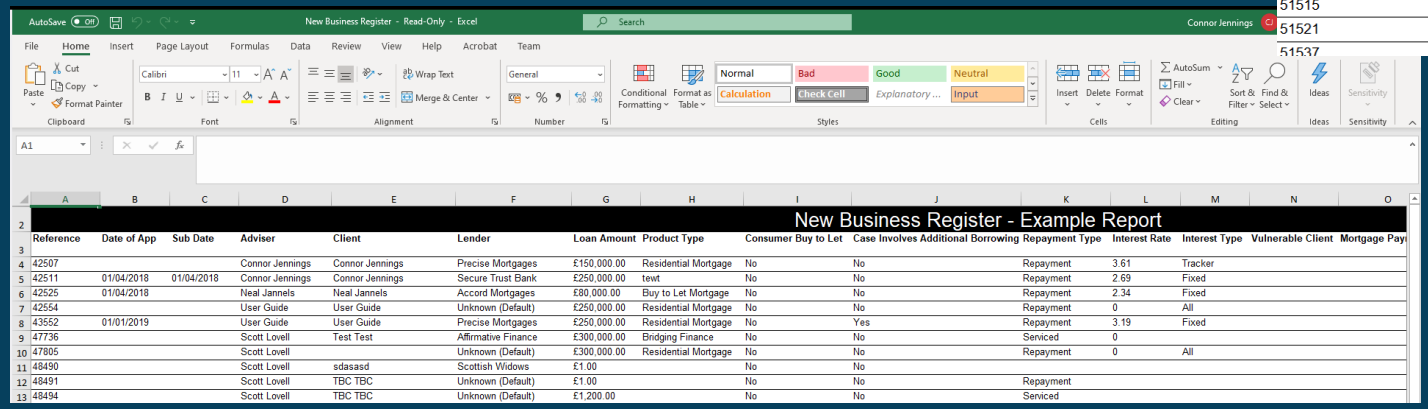


How to Export and Save Reports

- Once you have run your report in the reporting suite web page, you can then export this for saving for later or to play around with figures.
- Click the save icon on the taskbar as shown below.
- Then all you must do is select the export option that you want, and your browser will give you the option to open or save it.



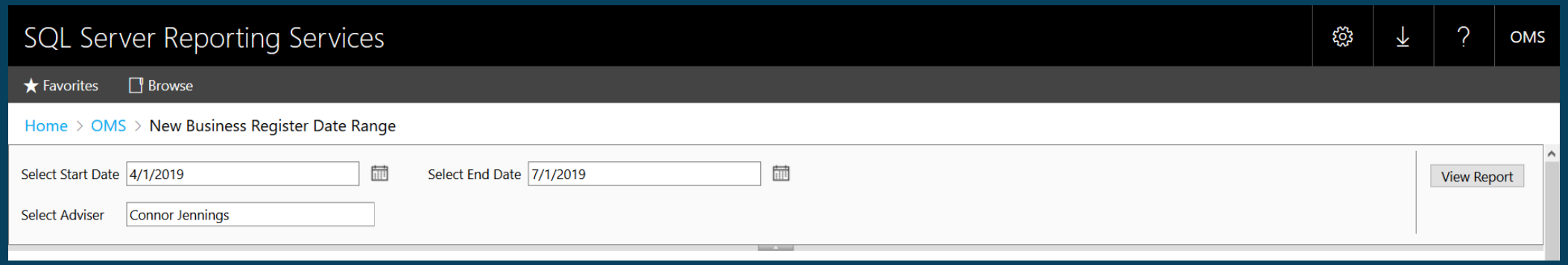
Reference	Date of App	Sub Date	Adviser	Client		Loan Amount	Product Type
42507			Connor Jennings	Connor Jennings		£150,000.00	Residential Mortgage
42511	01/04/2018	01/04/2018	Connor Jennings	Connor Jennings		£250,000.00	tewt
42525	01/04/2018		Neal Jannels	Neal Jannels		£80,000.00	Buy to Let Mortgage
42554			User Guide	User Guide		£250,000.00	Residential Mortgage
43552	01/01/2019		User Guide	User Guide		£250,000.00	Residential Mortgage
47736			Scott Lovell	Test Test		£300,000.00	Bridging Finance
47805			Scott Lovell			£300,000.00	Residential Mortgage
48490			Scott Lovell	sdasasd		£1.00	
48491			Scott Lovell	TBC TBC		£1.00	
48494			Scott Lovell	TBC TBC		£1,200.00	
48497			Connor Jennings				Test For Email and SMS (ENQ, DIP, APP
48497	27/02/2019		Scott Lovell	TBC TBC		£1.00	Test For Email and SMS (ENQ, DIP, APP
48503			Scott Lovell	TBC TBC		£1.00	
51515			Connor Jennings		1st Stop Home Loans	£111.00	Buy to Let Mortgage
51521			Scott Lovell		1st Stop Home Loans	£111.00	Buy to Let Mortgage
51537			Connor Jennings	11 11	Bath Building Society	£11.00	Buy to Let Mortgage



Reference	Date of App	Sub Date	Adviser	Client	Lender	Loan Amount	Product Type	Consumer Buy to Let	Case Involves Additional Borrowing	Repayment Type	Interest Rate	Interest Type	Vulnerable Client	Mortgage Pay
42507			Connor Jennings	Connor Jennings	Precise Mortgages	£150,000.00	Residential Mortgage	No	No	Repayment	3.61	Tracker		
42511	01/04/2018	01/04/2018	Connor Jennings	Connor Jennings	Secure Trust Bank	£250,000.00	tewt	No	No	Repayment	2.69	Fixed		
42525	01/04/2018		Neal Jannels	Neal Jannels	Accord Mortgages	£80,000.00	Buy to Let Mortgage	No	No	Repayment	2.34	Fixed		
42554			User Guide	User Guide	Unknown (Default)	£250,000.00	Residential Mortgage	No	No	Repayment	0	All		
43552	01/01/2019		User Guide	User Guide	Precise Mortgages	£250,000.00	Residential Mortgage	No	Yes	Repayment	3.19	Fixed		
47736			Scott Lovell	Test Test	Affirmative Finance	£300,000.00	Bridging Finance	No	No	Serviced	0			
47805			Scott Lovell		Unknown (Default)	£300,000.00	Residential Mortgage	No	No	Repayment	0	All		
48490			Scott Lovell	sdasasd	Scottish Widows	£1.00		No	No					
48491			Scott Lovell	TBC TBC	Unknown (Default)	£1.00		No	No	Repayment				
48494			Scott Lovell	TBC TBC	Unknown (Default)	£1,200.00		No	No	Serviced				

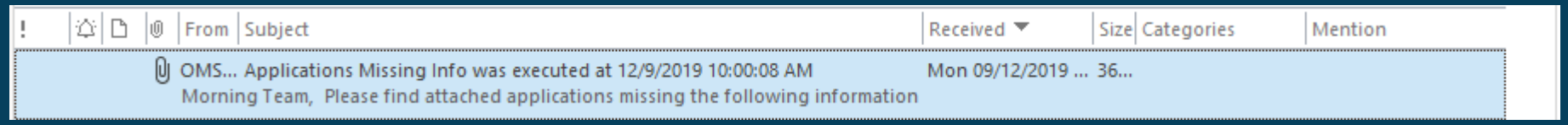
Report Parameters

- OMS reports can be enhanced using parameters. Parameters can be anything from date ranges, selecting specific users or loan types or even work as a form of search field.
- For example, if you want to run a pipeline report per adviser, we can add a parameter so you can select which adviser you want to generate the pipeline for, or if you want to find how many completions in certain date range we can add a start and end date parameter.
- Default parameter values can be used so that the report runs automatically, but if these aren't used the parameters will need to be added before running the report.



Subscriptions

- •As well as being able to run reports from the reporting web site, you can also have reports set up to automatically send to you, your staff or even individuals external to your organization.
- All reports are sent from the reports@omsystem.co.uk email address. If you have strong email filters, make sure to mark this email as trusted.
- Reports can have multiple subscriptions so different people can receive reports at different times, or if parameters are used a different subscription can be set up for different parameter values.
- Speak to the OMS support team if you want subscriptions set up on any/all your reports.



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https://onemortgagesystem.co.uk

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