

Portfolio Development

Administrator

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Inhaltsverzeichnis

Portfolio Development	3
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Portfolio Development

In the menu *Reporting > Standard > Portfolio Development* you get the following form:

The screenshot shows a web form for 'Portfolio Development'. At the top right, there is a 'show Information' link with a help icon. The form contains several sections:

- Export in background:** Radio buttons for 'Yes' (selected) and 'No'.
- eMail notification:** Radio buttons for 'Yes' and 'No' (selected).
- Select:** Two dropdown menus, both set to 'Dec' and '2013'.
- Type Of Period:** A dropdown menu set to '3'.
- Single Real Estate:** A table with a vertical scrollbar and a 'Filter' input field below it.
- Query-Management:** A section with the text 'Put together your personal query and save for later use.' It includes:
 - Load query:** A dropdown menu set to 'Demo' with a green arrow icon.
 - Save query:** An empty text input field with a blue document icon.
 - Description (optional):** An empty text input field.
- Einschränkungen:** A section with:
 - Filterauswahl:** A dropdown menu set to 'Liegenschaft/Straße' with a blue arrow icon and three small icons to its right.

At the bottom of the form, there are two buttons: a red 'query' button and a grey 'back' button.

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With the button: *query* you get a result in table style. It is advisable to choose the option: Export in the background when you have long reports, complex calculations or when your system uses a VPN or goes through a firewall.

With the button: *query* you start the report, during this you can see on the top right of your screen a message that the engine works on the report. Additionally you can choose the option: Notification with E-Mail (if not you just see on the top right a small popup), with the announcement of the generating report. In this case you have to configure in an E-Mail address. For security reasons the compiled tables will remain for by default one month in the system.

The query will be executed in the background.

In the dropdown field: Type of period choose 1, when the development shall be displayed within one year. Otherwise choose 3 for three month, 6 for a half year or 12 for yearly periods.

Yet you have another question leave it on this site for the metamagix-support-team.