

Portfolio Development

Administrator

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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. Additional 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.