

Using the Metagon Reporting Portal

Note: Start any demo with the Portal, as it is the component used by the greatest number of users.

Items to be selected are shown in *italics*; screen labels are **bold**; text to be typed is in “quotes”.

Action	Comments
Introduction to the Metagon Reporting Portal	
Open the Portal application	This is the workhorse that will take care of 95% of report users’ needs.
Finding Reports	
Notice the catalogs across the top, that help to organize reports	Reports are easy to find. Reports I use regularly are listed, as Recent or Subscribed, regardless of which catalog I have opened.
Click on <i>HR</i> file category and the Employees report category	Reports associated with Employees appear on the left. You may also use the Search Reports input field to find the report you’re looking for.
Running Reports	
Click <i>Employee List by Department</i> from the list on the left.	This report shows the employees working in each department.
Click on <i>Last Name</i> column header	This will sort the list by last name within each department.
Click and drag <i>Title</i> to follow <i>Employee #</i>	If the employee’s job title is most important to me, I can move it very simply to a new position.
Click on one of the underlined Employee ID values.	This field has been defined as a “drill-down” field, so it launches another report that provides more detailed information on the selected employee.
Click Recent Reports tab	It’s easy to go back to my available reports. I need to see which branches are doing the best in collections today, so I’ll bring up a pie chart.
Click the Refresh Reports Tree icon at the top left on the toolbar	Any time I want to be sure I have the most current data, I can rerun the report and get the most up-to-date information automatically.
Scheduling Reports	
Note the icons at the top of the window. Click the Schedule icon	You can set up regular reports and have them sent through email, printed, or saved on a server for public

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Click the Select Schedule drop-down. Select the report you want to schedule from the Report drop-down. Click the Weekly radio button.	The scheduler works just like Outlook or other schedulers you've seen. You can choose an existing schedule, or create a new one. Note that you can choose what format the report will take, and whether it will be emailed or saved to a file server.
Saving Reports	
Click the Save As icon	I can save reports in a variety of formats, including HTML for publication in a web page.