



Group & Batch

Reporting Quick Reference Guide

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Part of the



Series of Documentation

From Panoramix™ Financial

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Introduction

This quick reference guide (QRG) is a supplement to the Panoramix™ Group and Batch Reporting Manual created for the convenience of active licensees, subject to the same terms and conditions of that master manual. In the case of any conflict between the two, the Group and Batch Reporting Manual is the definitive source. This QRG assumes that you have read the Group and Batch Reporting Manual and need something with less detail as a refresher.

Create report groups through the **Reports**, BATCH REPORTS screen and use them as the source for either delivering batch reports to multiple/all clients or to individual clients.

Creating Groups of Reports

Several prerequisites, covered in the full Groups and Batch Reporting Manual and now assumed complete, guide how you will use this kind of reporting. This section assumes that you know which reports you want, and what parameters you desire.

From the Panoramix interface, select the **Reports** tab, BATCH REPORTS ribbon selection, **Generate Reports** tab. See the figure below for an overview of the ensuing screen. You may add any number of report groups and each report group may contain any combination of reports.

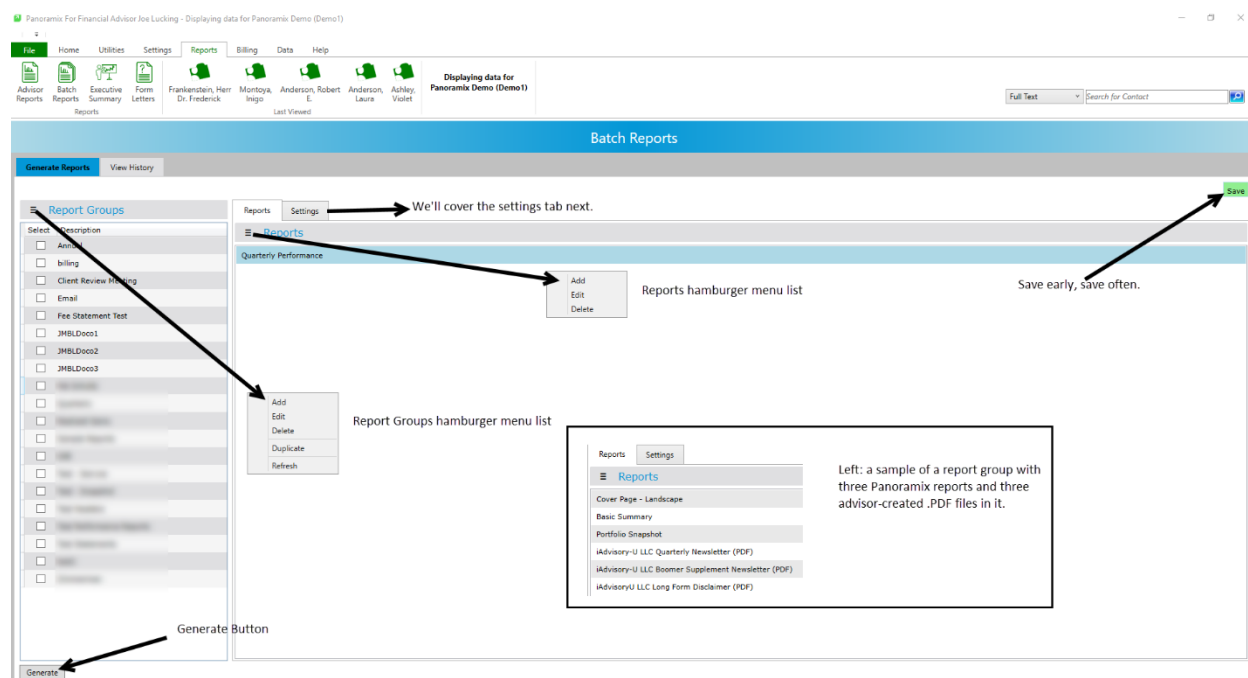


Figure 1: Batch Reports Creation and Generation main screen

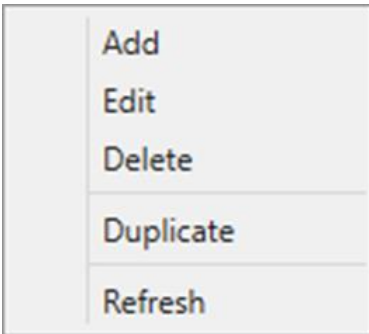


Figure 2: Reports Group menu for working with assemblies of reports with **save** button

Functionality of the Reports Groups hamburger menu covered in “Creating a New Group.”

Save

Save early, save often

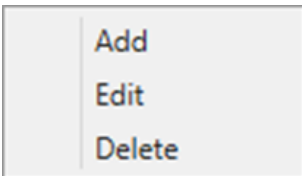


Figure 3: Reports menu for working with reports in the group

The functionality of the Reports hamburger menu selections covered in “Creating a New Group.”

See the “Generating Batch Reports” section for full description.

Generate

Figure 4: The **generate** button

Creating a New Group

From the Report Groups hamburger menus, select **add**. Give your report group a descriptive name in the ensuing dialogue box (see right) and click **save**.

Add Reports

Once you have a named Report Group, you may begin to add report content to that group. Report content can be any number of Panoramix reports in combination with any number of .PDF files which will all be run as a single batch and combined into a single output file.

Add a .PDF

Any .PDF file may be added to a reports group. See the figure below. This is a great method for including a quarterly newsletter, or subscription market watch journal for which you have distribution rights, as an addendum to other quarterly reports, for example. Recall the earlier example related to including different versions of a newsletter based on generation classification. This is where you add the various versions of your newsletter to your different report groups. The best method for doing this is to create your content as a .PDF file (MS® Office tools such as Word™ and Excel™ among many others allow you to easily save as .PDF) in a specific location with a relatively generic name that you can use over again and again. Then, in Panoramix perform the following steps. (This example is based on a quarterly newsletter created in house.)

1. Select (highlight) the Report Group to which you wish to add the .PDF (the reports included display in the Reports list).
2. From the Reports Banner, click the **add** button.
3. In the ensuing dialogue box, choose the *select PDF* radio button.
4. Type in a description that will show in the reports list.
5. Select the file you wish to include using the ... (browse) button functionality.
6. Click **save**.

Panoramix saves this report as part of your data in the cloud and all users in your firm will be able to run the report group without necessitating direct access to the file location whence it originated.

Part of your monthly/quarterly (however often you generate a batch with an attached .PDF file in it) work will be to maintain the contents of the group containing any .PDF file(s).

Figure 5: Adding a .PDF file to a group of reports—left, process; right, result in Reports list

Add Panoramix Reports

This is the fun part.

Once you know which reports you want to include in your group, you add them by selecting **add** from the reports hamburger menu. You then select the report and set its parameters in the dynamic dialogue box and **save** those settings. Once you have set the parameters for any given report, they are saved for future runs within that group. The same report in different groups may have different parameter settings.

Final list example

Figure 6: Example of targeted audience group of reports

Example: you could end up with a group that includes three Panoramix reports and three of your own .PDF files. Recall from the full Group and Batch Reporting Manual the concept of targeting groups of reports to specific client categories. The figure, left, is an example specifically targeted to clients tagged as member of the baby boom generation (Boomers).

Final List for this example

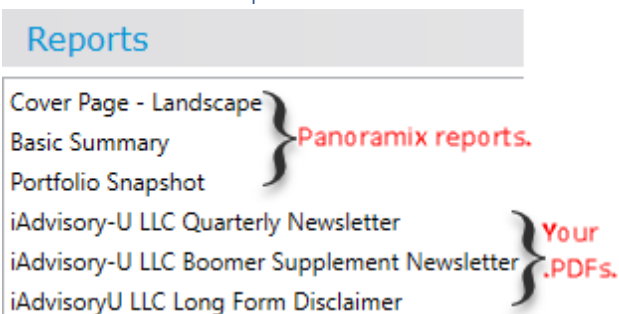


Figure 7: Example of targeted audience group of reports

For this example, you could end up with a group that includes three Panoramix reports and three of your own .PDF files. When you generate this group, you will want to ensure that it is distributed to your target audience—in this case clients you have tagged as members of the baby boom generation (Boomers).

Remove Reports

To remove a report from a group, highlight the report in the Reports list and select **delete** from the Reports hamburger meny. At the confirmation message box, select Yes.

Edit Report Parameters

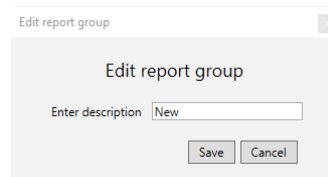
You may edit any report parameters by either double-clicking on the report name in the Reports list or by highlighting the report and selecting **edit** from the Reports hamburger menu.

Re-order Reports

You may add reports to the group in any order, keeping in mind that they will combine into the resulting .PDF file in the order in which they appear in the Reports list. To re-order the list, select the report that you want to move, click-and-drag it up or down the list to the place you desire, and drop it there.

Editing an Existing Group Name

The Reports Groups **edit** hamburger menu selection (see figure 3) allows you to edit the name of the highlighted (not selected with the check box, highlighted) report group (see dialogue box, right). To edit the contents of the reports in the group, use the menu selections from the Reports section hamburger menu See Creating a New Group for specifics related to button functionality.



Deleting a Report Group

To delete a Report Group you no longer need, highlight the report (don't use the multi-select check boxes) and select **delete** from the Report Groups hamburger menu. Confirm your deletion in the ensuing message box.

Creating a new Report Group based on the Content of an Existing Group

You may easily duplicate all the contents, report settings and distribution settings for a report group as the basis for a new group by highlighting the group you wish to duplicate and selecting **duplicate** from the the Report Groups hamburger menu. Give the group a new name and then easily make changes to report content, report settings, or distribution settings.

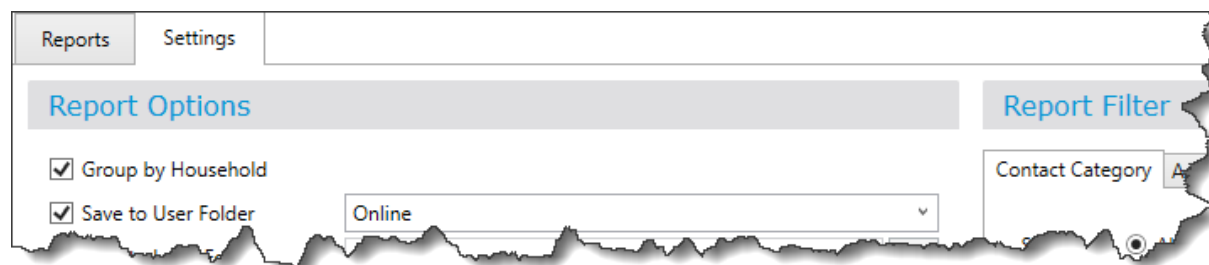
Refresh Report Groups List

The **refresh** menu selection refreshes the present list of report groups and their associated reports and distribution settings from your local computer's memory and re-sets those values from data stored on

the Panoramix database server. It also ensures that all links to such things as .PDF files in the Reports list are current and pick up any new content upon report generation.

The Settings Tab

Each report group has its own settings, saved for all future executions of the batch without need to change the settings at generate time.



The options and settings work exactly as described in detail in the *Batch Reporting Manual*, Generating Batch Reports, so please refer to that material. At generation time you may elect to change of the settings provided here and when you execute the generate task, the settings at run-time will replace the settings you established here.

Generating Batch Reports

Begin by selecting one or more groups of reports to generate together (see image, right, for example). Once you have selected one or more, click the **generate** button, found in the **Generate** lower left panel of the Generate Reports screen.

Each selected group of reports has its own Generate tab. The Report Options settings apply to all groups for which you are generating reports. The settings you elect on each tab's File Name and Report Filter sections affect only that group of reports, so each group can have its own parameters regardless of how many groups you generate simultaneously in your batch.

Select	Description
☐	
☐	
☐	
☐	
☐	
☐	
☐	
☒	JMBLDoco1
☒	JMBLDoco2
☒	JMBLDoco3

Figure 8: Main Generate Batch Reports Screen showing three tabs, one for each of the 3 groups selected at **generate**

For details on all the above options and settings, refer to the full *Batch Reporting Manual*. For the purpose of this Quick Reference Guide, we shall assume you are ready to generate a batch.

Generate Batch Reports Buttons

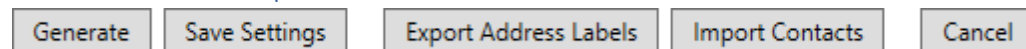


Figure 9: The row of buttons in the Generate Batch Reports Dialogue Box

Generate

Executes the generation of reports per all the settings selected in this dialogue box.

At the conclusion of all processing, you are given the opportunity to both view and save the master PDF of all the reports produced. We at Panoramix recommend viewing and carefully reviewing output, especially during the testing of any new groups or batches, and always saving the file to your compliance folder. The dialogue box showing the view, save, and close options follows, left. At right is a sample of the number of report pages created as shown inside a .PDF viewer.

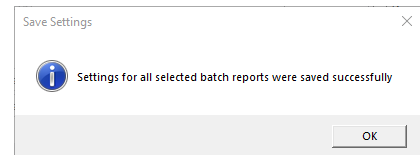


Every act of generating a batch or batches of reports saves the settings across all tabs of this dialogue box.

Save Settings

As noted above, each act of generating a batch or batches of reports automatically saves the present settings across all tabs of this dialogue box. The **save** button offers you the opportunity to perform intermediate saves to your settings should you desire it.

Upon successful save, the message box shown to the right informs you of the status.



Export Address Labels and Import Contacts

The **export address labels** and **import contacts** buttons are for advisors who process United States Postal Service (USPS) mail through Pitney Bowes®. The process involves exporting the file from Panoramix, processing it through Pitney Bowes, and re-importing that output into Panoramix so that Panoramix will produce the reports in the order that matches the optimal USPS sorting for maximizing your mailing discounts. All these steps must be completed prior to clicking **generate** if you are using this process.

Since this is a relatively rare practice, please contact the Panoramix support center (**Help**, SUPPORT REQUEST) if you need assistance with the Panoramix functionality offered.

Cancel

Allows you to cancel and return to the Generate Reports screen without generating any reports or saving your current settings.

Appendix A

Document Change Control

Date	Version	Requester	Author(s)	Approver(s)	Notes
11/28/2018	1.0	Advisors	Joe Lucking	Chris Hastings	Initial publication
3/21/2019	1.1	Sean Brzozowski	Joe Lucking	Chris Hastings	Style guide updates
4/18/2019	1.2	Sean Brzozowski	Joe Lucking	Chris Hastings	Updates through release 1.1.0.72
8/29/2019	1.3	Sean Brzozowski	Joe Lucking	Chris Hastings	Updates through release 1.1.0.86
4/22/2021	1.4	Various	Joe Lucking	Chris Hastings	Updates through release 2.0.0.19