Ascent 2018 Product Roadmap Sneak Peek: Report Builder

During the first day of Ascent 2018's, one of the first sessions we opened with previewed the upcoming changes to Orion's Report Builder app. We know that you're going to love the all-out customization offered in our future enhancements, so let's dive into some of the major highlights and updates you can expect to see later this year.

Page Formatting Enhancements

You'll have even more options to customize your page layouts and style your reports exactly how you'd like to present them to clients.

Any sub-report can be added as a full page, half page, or third-page option, meaning you can present two or three pie charts side-by-side, or emphasize a portfolio allocation sub-report by stretching it across the full width of the page. It's all up to you!

We're also including a new advanced layout feature that allows you to report on dynamically created report groups. For example, in a large household you can combine all retirement accounts, 529 accounts and taxable accounts into separate reporting groups, so you can ensure each portfolio group gets a visual representation on your reports.

Visual Enhancements

Throughout Report Builder, we're updating the look and adding news tyles for your daily use sub-reports.

At the top of the list will be multi-level pie charts that can stack information in a

single chart. As one example, you'll be able to display Asset Category on the inner circle and Asset Class on the outside of the chart.

You'll also see other new elements, like the ability to create a bar chart showing monthly household performance that's fully customizable by allowing users to choose the X-Axis and Y-Axis of the bar chart.

In our day one session at Ascent 2018, one of our clients and Sawtooth Solution's Director of Operations, Sam Nelson, shared his excitement about his firm's ability to customize the bar chart with ad hoc data, without the need to ask for development to create charts that clients want.

Table Creation

You'll soon be able to interact with report data through static tables or grouping tables. An example of a static table is any sub-report that does not group information, such as "Accounts Included in This Report."

A grouping table allows you to group data by various criteria, such as asset category and asset class; the "Portfolio Appraisal" is an example of this type of table.

Within each of these tables, you can now right-click to insert, delete or move columns. When creating or editing tables you will also be able to set report parameters through on-screen prompts. This allows you to add two performance columns while independently annualizing one while unannualizing the second.

Other New Report Builder Features

There are so many new elements coming soon and we couldn't cover all of them while at Ascent 2018, so here are a few other noteworthy features we want you to be aware of:

- **Standard and Personal Sub-Report Library:** Create a sub-report once, and use it over and over again.
- **Demo Data Preview:** Get a realistic view of how reports will look before you run them.
- **Household Aggregation:** Style reporting for a book of business where multiple households can be rolled up together for comprehensive analysis.

- **Benchmarking and Risk Measurement Flexibility:** Change comparative market index client-by-client instead of setting a single default for your entire database.
- **New Cover Page Builder:** Input the parameters of envelope address windows so you can know for sure that your address labels are in the right place, before you print.

We'll continue updating you with more details as the release of Report Builder 3.0 approaches, but for now we want you to get excited about the tremendous amount of customization coming your way in the next generation.

Don't work with Orion yet? Make sure you're at Ascent 2019. Click here to speak with our sales team to see how Orion's portfolio accounting solutions can support your firm.