# May 2019 Software Update Highlights

On May 18th, the Orion portfolio accounting platform will receive its second software update of the year.

Get yourself ready, because we're going to cover a lot of ground! In this preview, we'll give you a sneak peek into what you can expect in the upcoming weeks, like...

- Tons of feedback-driven improvements to Report Builder to make even better reports
- New enhancements to our dashboard tiles in our client meetings dashboard, Insight
- A brand-new Batch Performance app, allowing advisors to run performance across their entire database on their own

Keep your eyes out for another Orion blog when we'll review the full Release Notes and everything not covered in this post!

Reporting
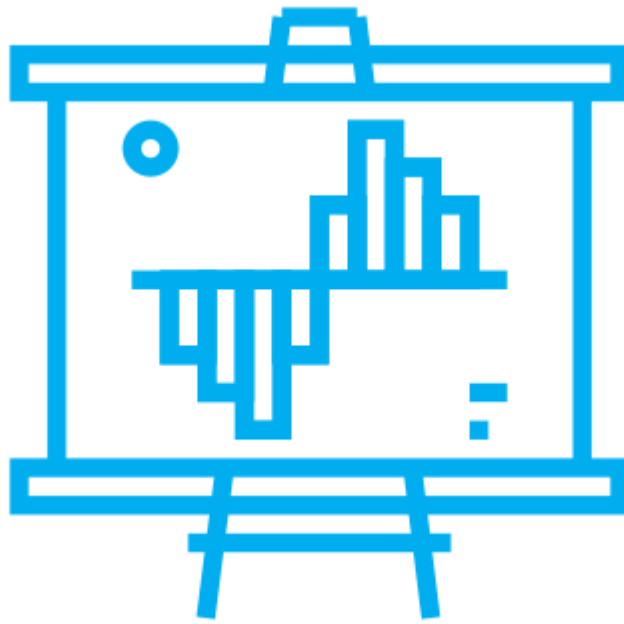
Take Advantage of New Report Builder Features to Build More Flexible, Personalized Reports

What We Built

When we released our brand-new Report Builder back in December, we told you to expect continual improvements focused on increased flexibility, efficiency, and personalization. And here we are! You'll have to check out the full release notes to see all of the reporting updates, but here are a few of our favorite ones:

- Reports generated from Report Builder will now be included in the Archive tool of our compliance suite. Now, it's easier than ever to locate previous reports should you ever be audited.
- We added the ability to group by time on tables. Once selected, the frequency can be set to select the interval for time. Enhanced grouping capabilities allow you to personalize reports for clients that prefer to view data in a specific format.
- We added the ability to filter data on tables and charts. Single or multiple filters can be added to narrow the scope of the data returned on a report. Say goodbye to information overload, and only share the data that matters.
- You'll now be able to select alternate line shading on specific elements.

When using a Static or Grouping table, the line shading can be enabled or disabled within the setting tab. Design and visuals matter, so here's to more ways to beautify reports for your clients!

Why It Matters

As one of the core components to any advisory firm, reporting can either be a giant headache or delightful experience—and we prefer the latter. We realize that you're spending considerable amounts of time building highly personalized reports. It's our responsibility to arm you with the advanced features to save you time and empower you to share the compelling data-driven stories that your clients expect.

How to Learn More

If you missed the launch of Report Builder 3.0 in December, here's a quick overview video.

And if you ever have any questions about our reporting tools, we're here to help at reporting@orionadvisor.com.

Client Experience

Make Client Meetings More Dynamic with Interactive Dashboards

What We Built

Some use our Insight app as a means to locate client data, and others use it a reporting tool. But our own data doesn't lie; advisors leveraging Insight as their client presentation dashboard are getting the most out of the robust tool.

So now, we're improving some of your favorite dashboard tiles to make your client meetings more engaging:

- You can now display household and account level target allocations at the same time in the Target Allocation tile, providing more flexibility in the way you review data with your clients.
- We've enhanced our Gain/Loss tiles to show more tax-driven information for both unrealized and realized data—because tax factors and implications matter.
- The Performance Detail, Holdings Detail, and Holdings Summary tiles can now be grouped by Product, allowing for a more aggregated view.

Why It Matters
Paper reports certainly have their place, but there's so much opportunity to make client meetings more dynamic. Take advantage of Insight—and all of its new updates—to collaboratively review portfolio details on their computer or television screen with detailed dashboard tiles.

How to Learn More
To learn more about Insight, don't hesitate to reach out at reporting@orionadvisor.com.

P.S. Don't forget that you can permission Insight tiles for your clients to see in the Client Portal!

Performance
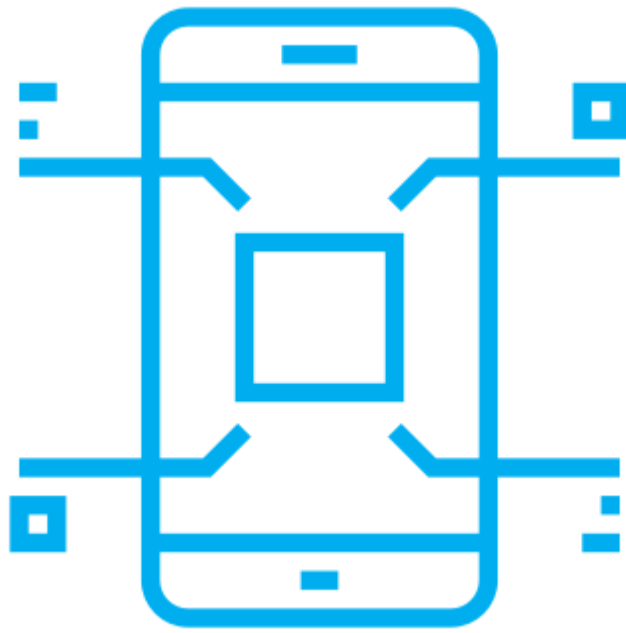
Run Your Own Performance Batches for Real-Time Takeaways

What We Built

It's no secret that we're always looking for ways to empower our advisors with more actionable and readily available data. This time around, we created a brand-new Batch Performance app, allowing you to run performance across your database for the groupings and time frames of your choosing.

With an intuitive wizard, you can run performance batches in just a couple of steps:

1. Determine the time interval for the batch report
2. Identify the list to run the batch for households, registrations, accounts
3. Select to group the batch by any number of criteria, including asset category, asset class, product, management style, etc.
4. Choose the rate of return and other performance options to generate the batch
5. Create the batch

And you're off! You can create multiple batches to satisfy your curiosity and delete old batches should they no longer be relevant.

Why It Matters

Batch performance can be critically important to measure the success of your firm's products, management styles, etc. Previously, running reports of this scope was only possible with the assistance of Orion's SME Performance team. But now, we're turning the power over to you—so you can get the information you need, when you need it.

How to Learn More
To learn more about our new Batch Performance app, performance@orionadvisor.com has your back. All of the highlights covered in today's article—plus many more enhancements and upgrades—will be coming to you soon!

Click here to sign up for our product release webinar on **May 29, 2019** to learn more about everything that's coming your way.