My Focus

Report Portal 2 0 User Manual

Prepared by:	HR Focus
Date:	20 October 2026
Version:	2026.10.1.0

Table of Contents

1. Find an authorised report 1

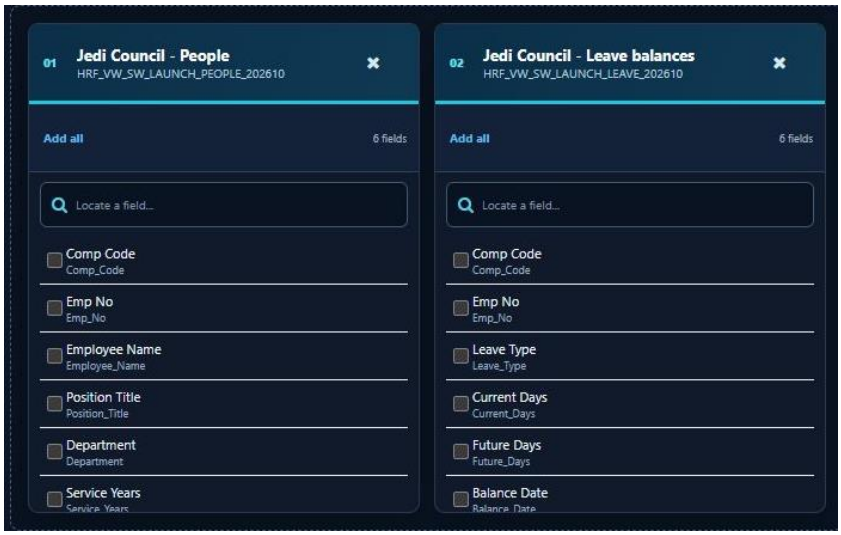
2. Run and inspect the result 2

3. Create and save a personal report 3

4. Use background results and export carefully 4

1. Find an authorised report

Report Portal brings the authorised catalogue, favourites, subscriptions, saved reports and background results together. Search for the question, select the right report and check criteria before interpreting results. This Coming Soon guide describes the refreshed portal and supported personal report workflow.

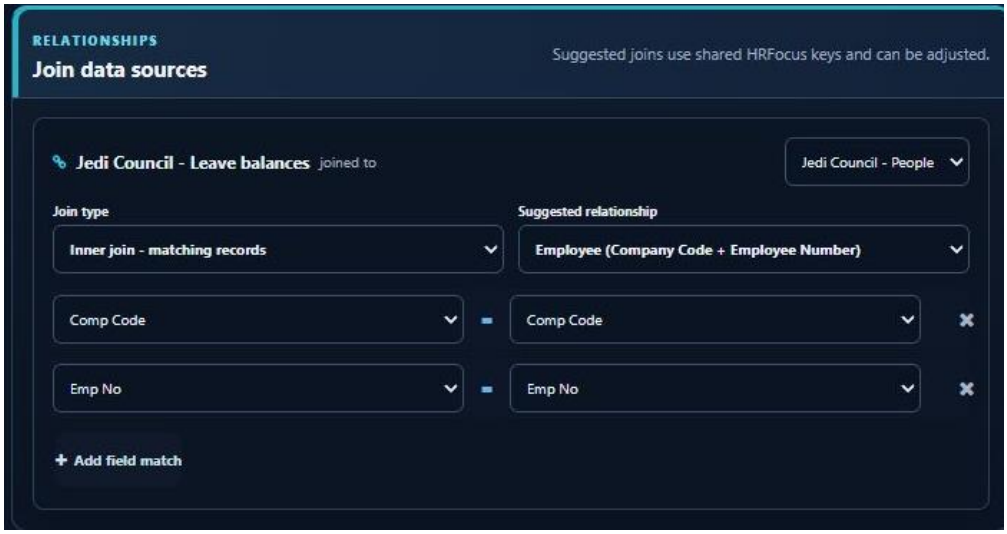


Secured source fields used for the fictional Jedi Council report.

Use All, Favourites, Subscribed, Saved and Background to change catalogue view. Module, type and sort narrow choices. A saved definition is different from a saved execution result. Report access still depends on secured sources and the signed-in user.

2. Run and inspect the result

1. Open the intended report and read title, description and criteria.
2. Set company, employee, period or other report-specific filters. Choose the native run or preview.
3. Check applied criteria and generation context before using the result.
4. Use section search, column menus, sorting or grouping where supported. These can change visible scope.
5. Review row count, totals, formats and missing values. Check that joined sources have not multiplied rows.
6. Explore charts, then return to supporting rows before drawing a conclusion.



Company and employee form the composite join in the fictional report.

A displayed chart is a view of configured measures. It does not prove every chart type or binary export passed validation.

3. Create and save a personal report

When New report is available, use the native designer with sources your account can access. Choose the primary source and add another only when required. Define intended join keys. In the fictional leave example, company and employee form the relationship; matching only employee can create an incorrect join.

1. Choose sources from the secured catalogue and inspect available fields.
2. Select and order fields; set number/date formats, labels and row/distinct options appropriate to the question.
3. Add criteria and check their operator and scope. Use totals and grouping only where meaningful.
4. Configure chart measures using actual fields and inspect the preview beside the rows.
5. Save with a clear name and description. Reopen from Saved and confirm sources, criteria and visibility.

Keep private sample text out of definitions. Saving does not grant source access to another user, publish a report or prove a large execution will complete.

4. Use background results and export carefully

When enabled for the report path, queue background execution with the intended criteria. Monitor its state in Background history. Open a ready result after checking report and criteria. IIS must stay available. The retained six-row example is neither a performance benchmark nor a 200-employee calculation test.

- Missing report/source: confirm catalogue and source permissions.
- Queued or failed run: inspect its state before retrying; avoid duplicate requests.
- Unexpected rows: revisit joins, date criteria, grouping and distinct.
- Expired result: check retention and rerun only the intended report.
- Export: select supported format and scope, then inspect the actual file before sharing.

Binary chart export remains uncleared for distribution because of recorded chart geometry limitations. Use reviewed browser results for this staged walkthrough. An export dialog is not successful export acceptance. Subscriptions depend on configured native scheduling and access; this guide schedules none.