

Tamarac PortfolioCenter®

PortfolioCenter®

Presentation Studio User's Reference Guide

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Introducing Presentation Studio

As a business owner, you understand the importance of your brand and how that brand sets you apart from others in your field. With the PortfolioCenter Presentation Studio, you have the ability to incorporate that brand into client presentations and customize them to match your branding and color scheme.

In previous versions of PortfolioCenter – before Presentation Studio – the customization options were limited. The Presentation Studio, however, gives you more customization options to help you provide your clients with the appropriate level of information for them. Among some of the customization features in Presentation Studio, you’ll find the ability to:

- ◆ Create your own client report presentations either by selecting the pages yourself or copying and modifying an existing client report presentation.
- ◆ Add your company logo and/or a company photo to pages.
- ◆ Format text to create a customized, formatted letter to your clients that you can include in the client report presentation.
- ◆ Standardize themes that can help you incorporate other materials into your client presentations to give your clients more information.

This guide is a comprehensive look at the Presentation Studio and how to use it to build and customize client presentations. Before getting started with building presentations, however, it is best to understand the presentations, how they differ from PortfolioCenter reports, navigating in Presentation Studio and the parts of presentations to make the building process as seamless as possible.

How are Client Presentations Different from PortfolioCenter Reports?

Client Presentations might be new, but they offer some similarity and familiarity to the PortfolioCenter Reports you already use. Take a moment to compare the two options:

The traditional PortfolioCenter reports give you the option to select more data points and select the order they appear on the page, but you had to set up each report one by one and include them in a batch print job to print a presentation for the client.

Client presentations, by contrast, give you more color, image and text customization options and come in a combined presentation that you can print for a single portfolio, a group or a set of portfolios and groups. One limitation, however, is that some of the data points available on traditional PortfolioCenter Reports are not available on client presentation pages at the moment.

Traditional PortfolioCenter Report:

John Smith, CPP
4552 Main Street
Suite 1134
Raleigh, NC 27600

Portfolio Holdings
As of 09/30/2010

Description	Quantity	Current Value
US Equities		
Apple Computer Inc.	3,080.000	\$399,425.60
Intel Corporation	12,147.000	\$240,541.59
Lady Bird & Company	5,200.000	\$225,775.22
Lockheed Martin	1,965.000	\$161,152.00
United Parcel Service B	4,786.000	\$279,012.74
		\$1,305,947.15

Exchange Traded Funds
Shares Conv Jones US I
Foresight Dynamic I
SPOR:SGP Pharmaceuticals

International Equities
SP:PLC ADR
Toyota Motors ADR

Domestic Stock Funds
Bacon Asset Fund
Bacon Opportunity
BlackRock US Equity Inv
Jacob Internet
Janus Cities

Client Presentation:

WFWM
WILLIAMS FINANCIAL WEALTH MANAGEMENT

Portfolio Holdings
Just Andri BROKERAGE ASSET MANAGEMENT

Period Ending: 9/30/2010
Portfolio Holdings Date: 9/30/2010

Weight	Symbol	Description	Quantity	Price	Current Value
189.0%		Portfolio Total			\$4,249,644.20
34.3%		US Equities			\$1,305,947.15
13.6%	AAPL	Apple Computer Inc.	3,080.000	\$130.02	\$399,425.60
6.5%	INTC	Intel Corporation	12,147.000	\$19.77	\$240,541.59
6.2%	LADY	Lady Bird & Company	5,200.000	\$43.42	\$225,775.22
3.7%	LMT	Lockheed Martin	1,965.000	\$81.92	\$161,152.00
6.4%	UPS	United Parcel Service B	4,786.000	\$58.29	\$279,012.74
18.3%		Exchange Traded Funds			\$446,110.11
1.6%	ITV	iShares Total Stock (E) Domestic Stocks Index I	7,171.000	\$62.16	\$446,110.11
3.7%	FPI	Fidelity Divers Intl/Foreign Sector	6,967.000	\$17.77	\$123,774.60
3.0%	SPY	SPDR S&P 500 Performance ETF	3,980.000	\$31.07	\$123,559.89
4.3%		International Equities			\$187,684.62
3.2%	SPY	SPY:SP500	1,798.000	\$104.39	\$187,684.62
1.1%	SPY	SPY:SP500	1,102.000	\$170.14	\$187,684.62
38.6%		Domestic Stock Funds			\$1,822,772.98
6.4%	BACFX	Bacon Asset Fund	6,162.107	\$29.56	\$182,772.98
7.2%	BOPFX	Bacon Opportunity	28,271.170	\$6.48	\$182,772.98

This data is gathered from what is believed to be reliable sources. It is not a guarantee of accuracy. Please use your knowledge and discretion as an accurate reflection of your portfolio.

Introducing Presentation Studio

Equating Client Presentations to PortfolioCenter Analytical Reports

Client Presentations offer professional, visually appealing and branded report pages and can be a great communication tool to use with your clients. It might be a good time to think about how you present data to your clients and decide whether to use client presentations or analytical reports, or some combination of the two.

Consider the following questions when making that decision:

- ♦ What do your clients say they need from their reports? Are you asking your clients what they need? Have you asked them? What kinds of questions are they asking you? Can you produce that in a report or client presentation?
- ♦ What are you doing now? Take the time to evaluate what you are currently doing and match that with the requests your clients are making.
- ♦ How much flexibility do you need? While client presentations are increasingly flexible, analytical reports, while not as visually appealing, provide greater flexibility in the data points available. Take the time to review the pages of data available in Presentation Studio and match that with the ability to control the order of the data columns on the PortfolioCenter Reports.
- ♦ Evaluate the importance of displaying your brand on all aspects of the report – how important is it to have your brand or logo colors on each page?

Introducing Presentation Studio

Terminology

Term	Definition
Page	<p>The individual pages of data points contained within a package that you can add, move and remove from Client Presentations. Pages include the data points that can be displayed as rows of data, data tables and graphs, or any combination of them.</p> <p>See the What is a Page? section starting on page 14 for more information and visual examples of pages available in PortfolioCenter Client Report Presentations.</p>
Element	<p>Elements are parts of pages and presentations that work independently of the pages that control visual aspects of the pages. The fact that they are separated from the presentations and pages means that you can assign different image, text and theme colors for each presentation you create and use.</p> <p>Currently, there are three types of elements:</p> <ul style="list-style-type: none">♦ Image Elements – add images representing company logos or staff photos to give your presentations a professional look. For more information about image elements, see Working with Image Elements starting on page 37♦ Text Elements – Create customized text to create letters or updates to clients. For more information about text elements, see Working with Text Elements starting on page 31 for more information about working with text elements.♦ Theme Elements – select and edit the color schemes you have associated with the presentations by selecting the theme assigned to the presentation. For more information about theme elements, see Working with Theme Elements starting on page 22.
Client Presentations	<p>A presentation is the combination of pages, combined in the order you find appropriate, that you will print or save for your clients.</p> <p>PortfolioCenter comes pre-loaded with several Client Presentations to get you started, but you have the option to create, copy or modify any of those presentations to meet your needs. For more information about Client Presentations and how to build or modify them, see the Building Presentations section starting on page 41.</p>
Package	<p>A package contains all the pages, elements, and client presentations developed by Envestnet Tamarac that you can install into your database.</p> <p>Using Presentation Packages makes it easy for SPT to provide new pages, presentations, themes, text and image elements between major program releases.</p> <p>For more information about reviewing, downloading and installing packages, see Working with Presentation Packages starting on page 53.</p>

Introducing Presentation Studio

What is in this Guide?

It is most likely that you will not have to spend a lot of time in Presentation Studio. You'll spend time building or modifying presentations at first, and then only when new packages become available with new data points, pages, image, text and theme elements.

This guide is the best place to start when getting oriented to Presentation Studio to build or modify your first presentation. In this guide, you'll learn:

- ◆ How to navigate through Presentation Studio. It is a new tool to PortfolioCenter, and, even if you used it in PortfolioCenter 5.0, some changes were made to it starting in PortfolioCenter version 5.1. Be sure to review the Navigating Presentation Studio section starting on page 5 for more information about the studio and how to navigate through it.
- ◆ The construction of pages you can use to build presentations. Learn about the page names, data points and options for the pages in this section so you can better select the types of data you will use when you build your presentation. For more information about these pages, see the Working with Presentation Pages section starting on page 14.
- ◆ About presentation elements that you can use to customize and enhance your client presentations using image, text and theme color elements. Learn strategies for types of text and images to use, and tips and techniques for modifying the standardized themes to match the color schemes in your logo or other printed materials. See the Working with Presentation Elements section starting on page 21 for more information about these options.
- ◆ To build a presentation. Learn strategies and best practices for creating presentations for your clients. Do you plan to use the provided presentations or do you plan to build your own? Are the ones provided to you close to what you want after a few minor modifications? Learn about incorporating the various elements into the presentations, adding, deleting and moving pages, and when to select the elements that are right for you. See the Building Presentations section starting on page 41 for more information and step-by-step guidance on the process.
- ◆ To print presentations for your clients. Printing client presentations is easier than ever. Easily see a preview and print the presentation for an individual client or create a batch print job to print on paper or to a file that you can upload to a website or email to your client. See the Printing Presentations section starting on page 50 for more information about printing options.
- ◆ Updating presentations and pages by getting new packages from our website. Between major PortfolioCenter releases, we will provide you with updates, enhancements and improvements to existing client presentations and pages via a report package you can download and install from our website. See the Working with Presentation Packages section starting on page 53 for more information and tips for installing packages.

Navigating Presentation Studio

Most likely, you will use Presentation Studio to create your first client presentations and when you download and install new packages. However, because it is a new tool, take the time to learn how to open and use it properly to save you time and gain efficiencies. This chapter will help guide you through the parts of the Presentation Studio so you are better prepared for the new tool.

Opening Presentation Studio

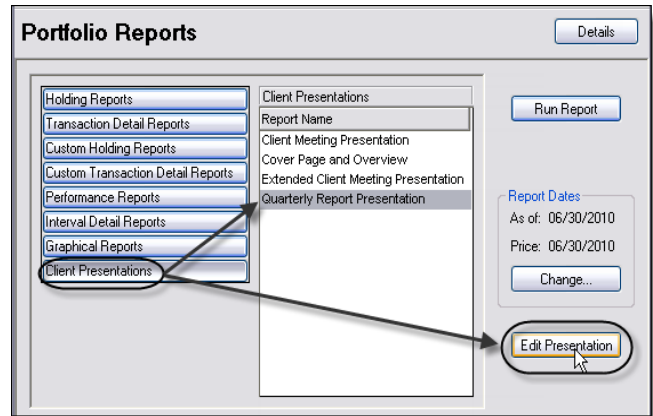
Presentation Studio is an application within the PortfolioCenter application and can easily be accessed through two methods. This section shows you the two ways to open the Presentation Studio:

From the Reports Menu

When in the Portfolio Reports screen, you will see a new button located below the list of report type buttons that is labeled Client Presentations.

Click this button to see the list of presentations in the center of the window, as you normally see for the other report types.

To edit a presentation, select any presentation from the list in the center, and then click the Edit Presentation button, located on the right side of the window under the Report As Of and Price File dates, as shown in the example on the right.

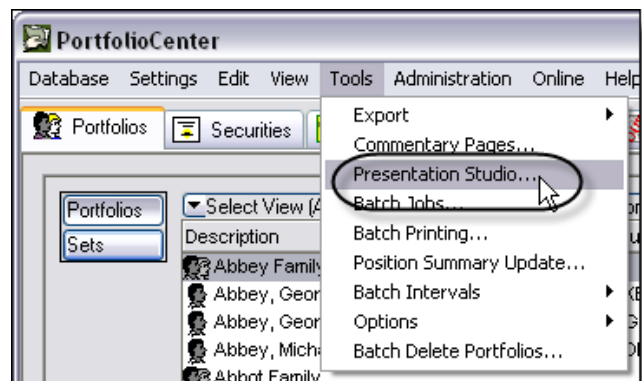


From the Main Portfolios page

If, however, you are not editing a specific presentation or if you want to see inactive presentations (covered in more depth in the Working with the Active/Inactive Presentations Feature section starting on page 12) go to the following path from the Main Portfolios tab menu bar:

Tools | Presentation Studio

Similar to the example on the right. Both of these menu paths will open the Presentation Studio in a separate window.



Navigating Presentation Studio

Parts of the Presentation Studio

Similar to other Studio or designer type applications, the PortfolioCenter Presentation Studio has three main parts, each serving a very specific function:

- ◆ Navigator Pane – located on the far left side of the window, this pane lists each of the presentations that, when expanded, lists each page located within the presentation. Below the list of presentations, you will also see a list of all the elements available to you. See the Navigator Pane section starting on page 7 for more information about this section and what you can do with it.
- ◆ Preview Pane – the center of the studio, the Preview pane shows you a preview of the open or selected presentation or element. See the Preview Pane section starting on page 8 for more information about this section and what you can do with it.
- ◆ Properties Pane – located on the far right side of the window, this pane displays additional information about the open or selected presentation, page or element and provides you with the edit options you can use to customize that item. See the Properties Pane section starting on page 10 for more information about this section and what you can do with it.



See the following sections for more detailed descriptions about each of these sections and how to make them work for you.

Navigating Presentation Studio

Navigator Pane

The Navigator pane, located on the left side of the Presentation Studio, provides you with lists of all the available items you have at your disposal that can help you build client report presentations.

Presentations Library

The Presentations Library, located at the top of the Navigator pane, displays all the presentations you have available. In the example to the right, we are seeing all the active presentations available from the standard package used during the installation of PortfolioCenter 5.1. We'll cover more about opening and activating presentations later in the Opening Presentations section starting on page 12.

Element Libraries

Currently, there are three element libraries available in Presentation Studio in versions of PortfolioCenter 5.1 and higher: the Image Element Library, the Text Element Library and the Theme Element Library.

Image Element Library

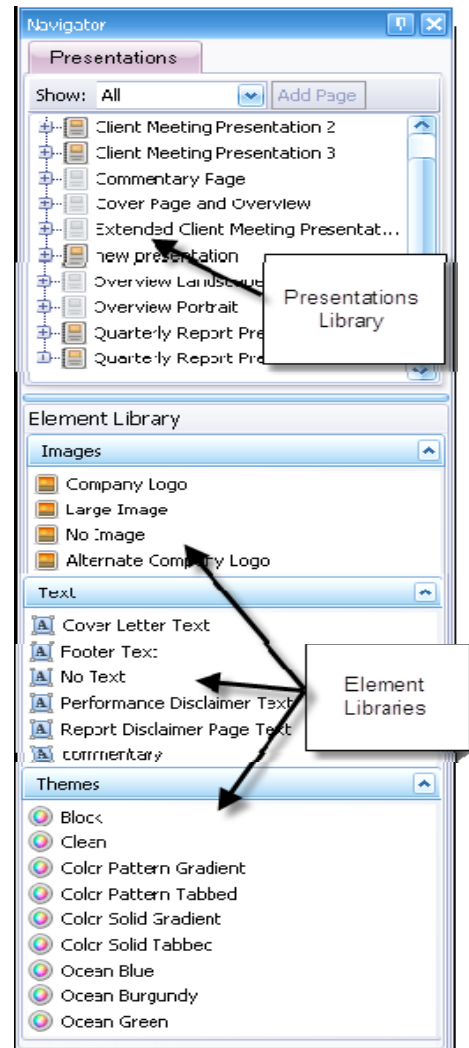
The Image Element Library lists all the currently available image elements in Presentation Studio. We'll learn more about adding, deleting and modifying image elements in the Working with Image Elements section starting on page 37.

Text Element Library

The Text Element Library, like the Image Library, is a list of all the text elements you have to choose from when adding them to certain pages available in the presentation building process. We'll learn more about adding, deleting and modifying text elements in the Working with Text Elements section starting on page 31.

Theme Element Library

Finally, the Themes Library lists all the themes you have available to use with any of the presentations. Currently, you cannot add themes, but you can modify the color schemes to fully meet your branding needs. We'll learn more about modifying the theme colors in the Working with Theme Elements section starting on page 22.



Navigating Presentation Studio

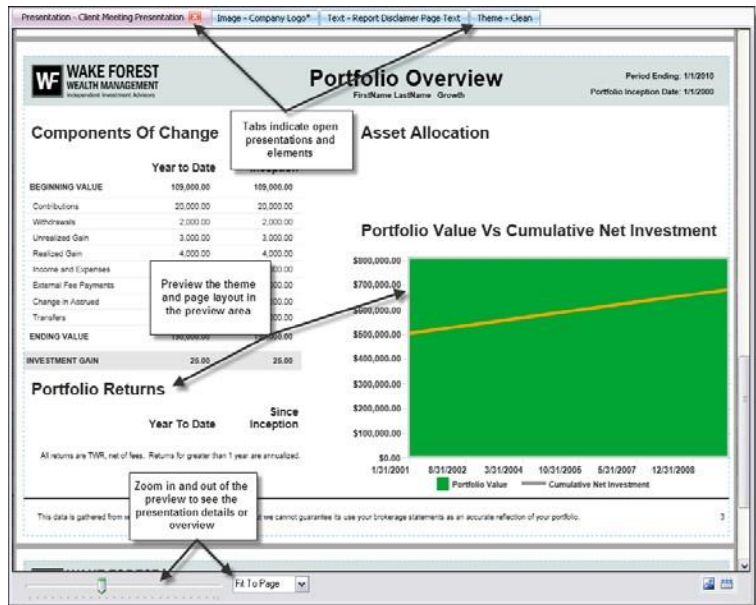
Preview Pane

The Preview pane, located in the middle portion of Presentation Studio, displays the open presentation, page, image element, text element or theme element.

Similar to tabbed internet browsing, you can have several items open at once and are able to go back and forth between them.

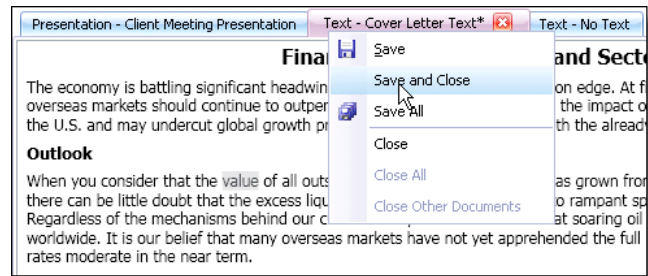
For example, you can make a change to an image element on the Image tab, save the change, and then check to see how it looks on the presentation by clicking the presentation tab.

Pink tabs indicate that what you are seeing in the preview area is the item you are currently working with. In our example to the right, we have the Client Meeting Presentation open.



Tabs with an asterisk (*) to the right of the tab name is an item that has been edited but not yet saved. In the example above, we have made an edit to the Image tab, but not yet saved it. The asterisk is a quick way to tell what changes have been saved and what still needs edits and saving.

The tabs also offer right-click menu options that give you flexibility while creating text and image elements. The menu options available from the right-click menu are:



- ◆ Save – saves only the changes on the current tab.
- ◆ Save and Close – saves only the changes on the current tab, and then closes the tab.
- ◆ Save All – saves all changes on all tabs at the same time.
- ◆ Close – closes the current tab only
- ◆ Close All – closes all tabs currently open in the Presentation Studio.
- ◆ Close Other Documents – closes all tabs other than the currently selected one.

These menu options can be a great time saver when setting up Client Presentations for the first time, especially if you are creating several text or image elements at once.

Navigating Presentation Studio

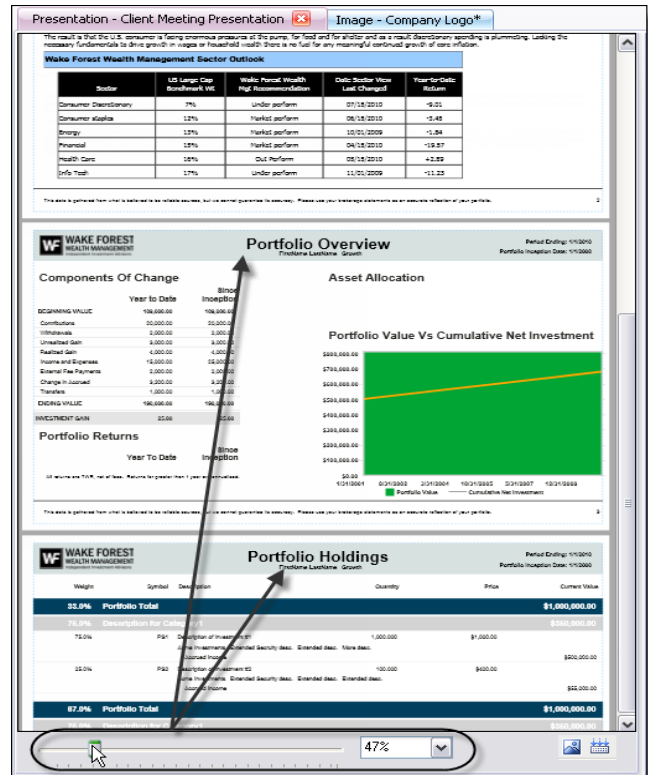
Use the zoom controls at the bottom of the window to zoom in and out of the presentation.

Zoom in to see details of the page and clearly identify any issues with fine print or small text. Although you will not be able to see the details of graphs until you run the presentation for a portfolio or group, you can get an idea about how text and graphs are laid out on the page and the order of the pages.

Zoom out to see the presentation pages as a whole – get a bird’s eye view of the pages and their order – to better visualize how it might look on a printed page.

There are two ways to zoom:

- ◆ The zoom slider. Located on the lower left side of the Preview Pane, the zoom slider gives you the ability to zoom in and out free-hand.
- ◆ Zoom Percentage selector. Click the arrow to the right of the zoom slider to select from a pre-defined list of zoom percentages (100%, 50%, etc) or the Fit to Page option that snaps the image you are seeing to the outer parameters of the preview pane.

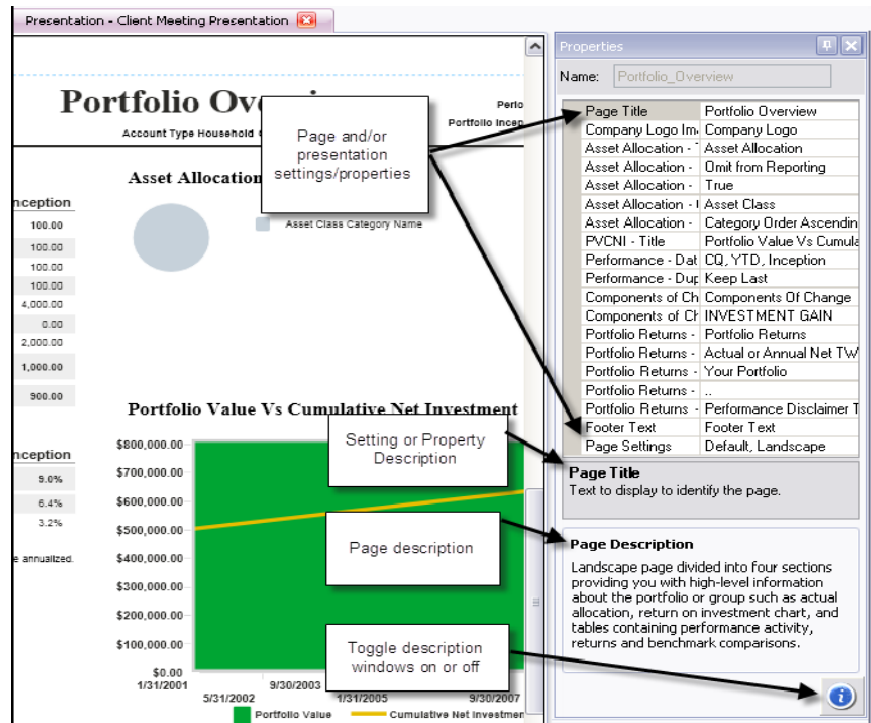


Navigating Presentation Studio

Properties Pane

Located to the right of the preview pane, the Properties Pane displays information about the selected page or presentation, as well as the settings options for that particular page or presentation.

At the top of the Properties page are the settings associated with the presentation or page, depending on what is selected in the navigator on the left. Settings affecting presentations are generally going to be presentation names, page orientation and assigned themes. Settings applied at the presentation level are visible throughout each page. For example, if you set the page orientation for the presentation to be Landscape, all pages in the presentation appear in Landscape.



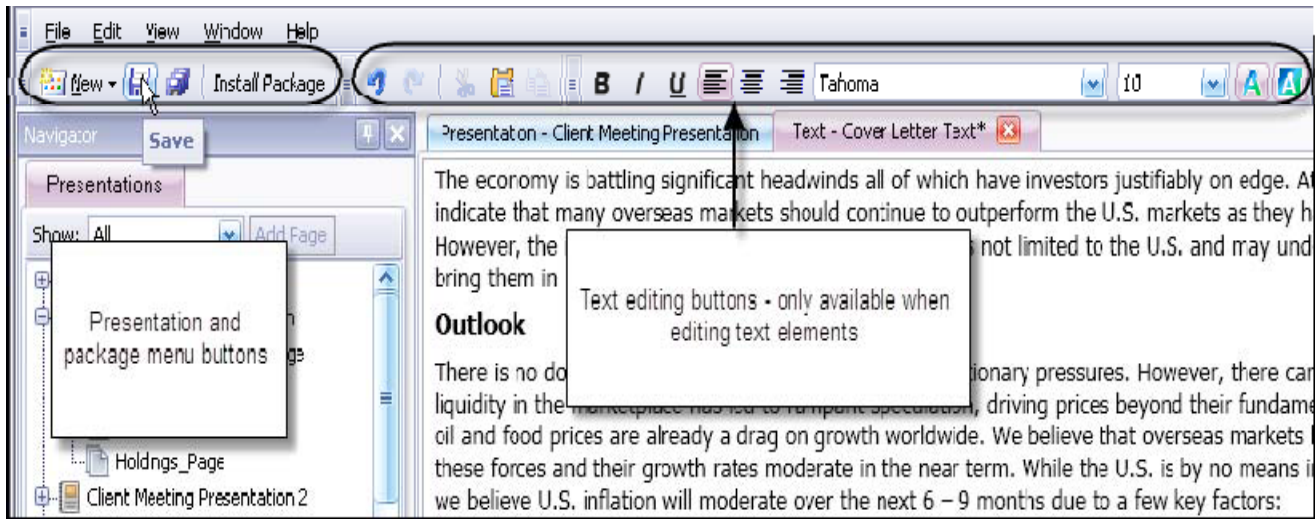
Settings associated with pages, on the other hand, affect only that page. At minimum, all pages will have a Page Title and Page Orientation setting. However, pages with multiple data points could have additional settings affecting those data points, such as titles or default settings for invalid data, similar to the Portfolio Overview example above.

Below the page settings, you should also see two informational panes to give you more detail about the page and setting you currently have selected. For example, want to know more about the PVCNI setting? Click on that field and see more information in the gray box located below the settings.

However, let's say you want more information about the page itself. The Page Description box should give you more information about the contents or use of this specific page while you are in preview mode. In the event you don't need or want to see that information, click the blue information button, located on the lower right below the page Description box, to remove that box from view. To see it again, click the button again to display it.

Navigating Presentation Studio

Menu Bar Buttons



On the menu bar, you should find several buttons that can help you quickly access menu options, similar to other applications that might be familiar to you. For the most part, these buttons work in tandem with the selected items in the Navigator or Preview panes.

Presentations and Package Buttons

On the far left side of the tool bar, located above the Navigator pane, the **New** button creates new presentations, image elements or text. Anything you create using the **New** button appears in the Navigator pane.

In the middle, there are two save buttons – the one with a single disk icon saves only the information on the selected tab in the Preview Pane. The button to the right, with an icon that appears to have several disks, saves all changes on all tabs. Finally, the Install Package button installs newly downloaded packages. See the Working with Presentation Packages section starting on page 53 for more information about installing packages.

Text Modification Menu Buttons

These buttons are only available when editing a Text Element and are very similar to rich-text editing tools found in applications like WordPad. They range from Undo/Redo editing tools, formatting tools and copy/paste tools. For more information about these tools and how to use them, see the Working with Text Elements section starting on page 31.

Navigating Presentation Studio

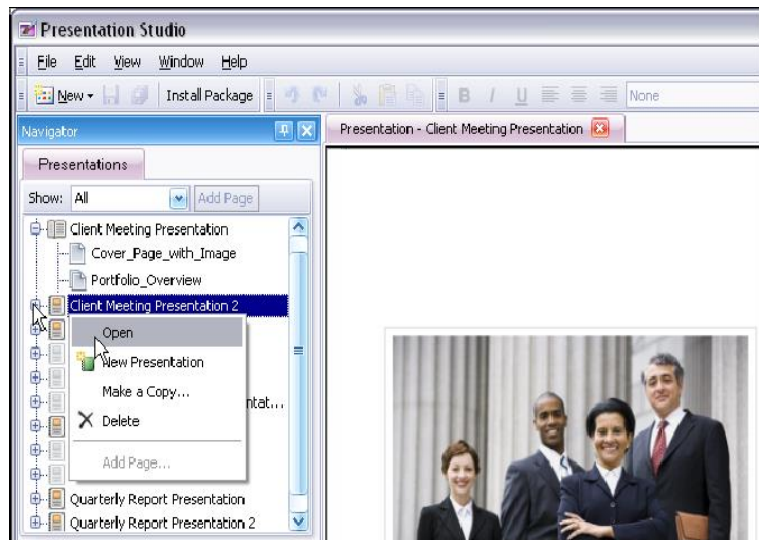
Opening Presentations

Now that you understand how to find things in Presentation Studio, let's take a look at opening presentations.

You will always open presentations from the Navigator pane on the left. From the list of presentations available, you can open them by either:

- Clicking the plus icon to the left of the name of the presentation to expand it
- Double-click the name of the presentation to open it

The open presentation will appear as a named tab in the Preview Pane, similar to the example on the right.

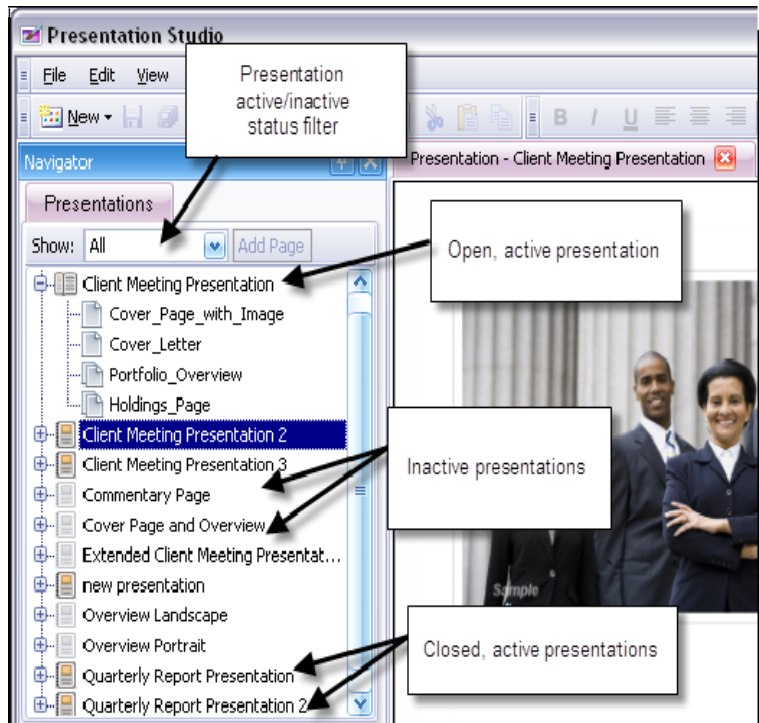


Working with the Active/Inactive Presentations Feature

You have the ability to make presentations active or inactive to have better control over presentations that you no longer use or want to retire. Also, each time you install a new package, all presentations will come in as inactive to help you manage the list of active presentations.

By default, the view of the Presentation Status filter is set to Active so you only see active, usable presentations. If you need to see the presentations that are inactive, click the down arrow to the right of the field and select either All or Inactive from the list.

Selecting All from the list displays the active and inactive presentations in the list. Inactive presentations appear as grey or “ghosted” icons, similar to the Cover Page and Overview presentation in the example above. Active presentations appear as green folder icons indicating they are ready to be used.



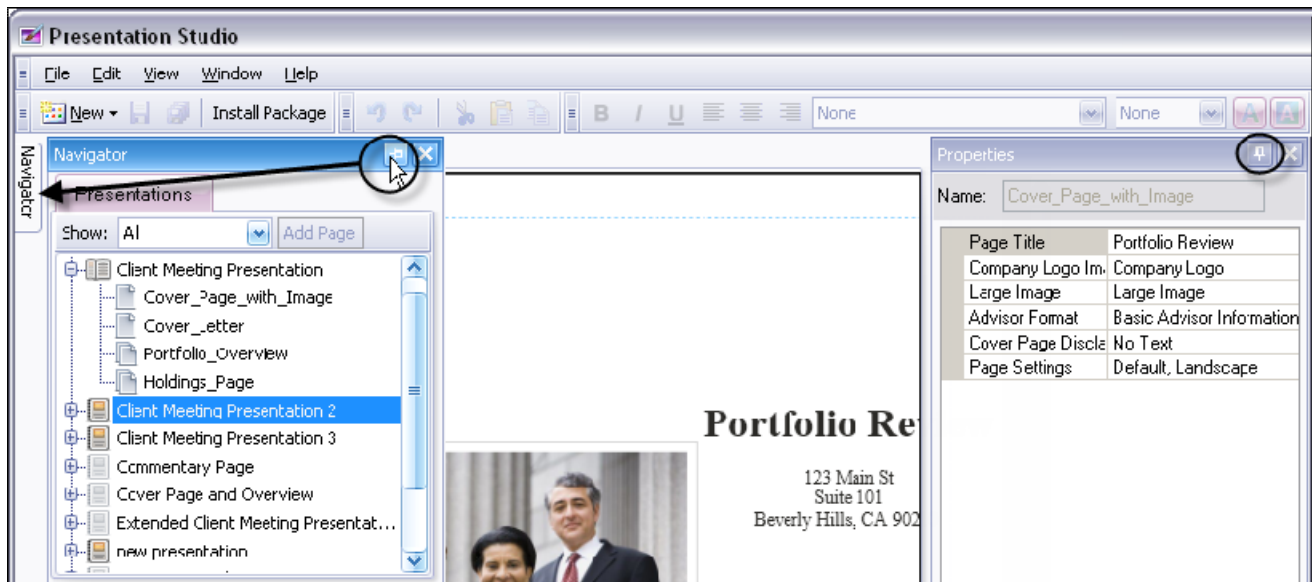
Navigating Presentation Studio

Using the Pins to Hide Navigator and Properties Panes

If you could use more space in the Preview pane, try using the Pins to hide the Navigator and Property panes so you can see more of the preview pane.

When the pin appears to be pointing down, as it does in the Properties pane on the right side of the image below, the pane will always take up that space in the Presentation Studio. If, however, you click the button so that the pin appears to be pointing to the left, as it appears in the Navigator pane on the left side of the image below, when you move your mouse away from the pane, it retracts to the side and becomes a tab. When you need to see that information again, click the tab to bring the pane back into view.

This setting can be toggled so that you can turn the feature on and off as needed.



Working with Presentation Pages

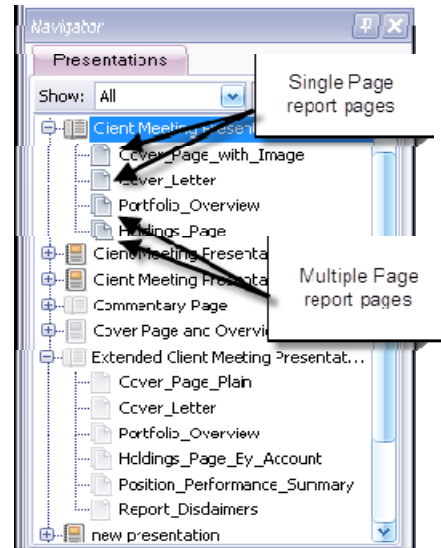
Pages are the cornerstone of Client Presentations. The pages you select for the presentation determine the level of detail and information your client sees and the order in which they are placed in the presentation is used to effectively communicate the health of the portfolio to the client. Understanding pages and how they work is vital to planning.

What is a Page?

The Pages are the parts of the presentations that contain the data points you will show to clients. There are two basic types of pages:

- ◆ Single Pages – these are pages that have data, images or text that span only one page. Common examples of a single page are cover pages, overview pages and pages supporting text elements like commentary and disclaimer pages.
- ◆ Multiple Pages – these are generally only data pages and can support spanning beyond a single page. Common examples of multiple pages are Holdings Pages and Position Performance pages.

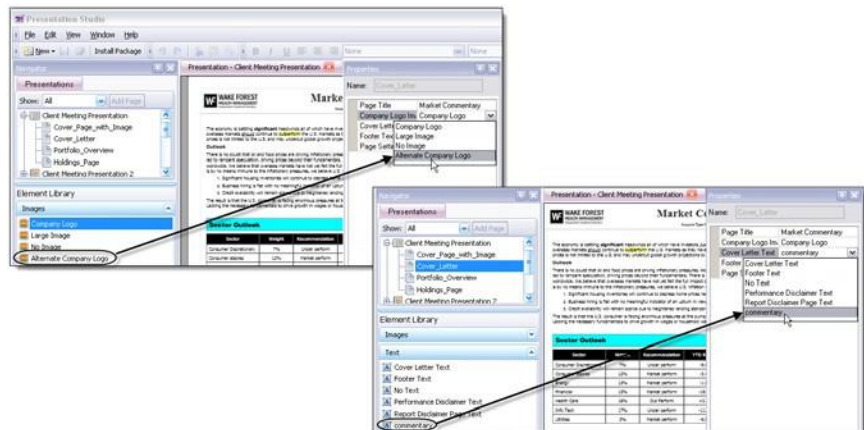
In the Navigator Pane, pages are listed within the presentation, as shown in the example on the right. All the single pages have an icon that appears as a single page while all the multiple pages appear as icons that have three pages to them.



Page Elements

There are two types of elements:

- ◆ Text Elements – saved blocks of text that you can add to either full-page text pages or sections of pages.
- ◆ Image Elements – saved images in the database that you can use as either a company logo or a cover page image.



For more information about adding, editing and using text and image elements, see the Working with Presentation Elements section starting on page 21.

Working with Presentation Pages

Pages Available in this Version

There are many pages available in this version of Presentation Studio using the most recent package. However, we are adding new pages all the time. For the most up-to-date list and examples of pages, be sure to visit our Presentations Gallery at: <https://tamaracpc.com/public/spt/client-news-and-resources/portfoliocenter-report-presentations/gallery-portfoliocenter-report-presentations>. On this page, you can get detailed specifications for all the presentations, pages, and themes currently available, as well as download the most recent package. The table below lists all the pages available as of the most recent release of PortfolioCenter.

Page Name	Description	Supports Image	Supports Text
Account Summary Landscape	Designed to be used with groups, this performance data page displays combined group performance as well as performance per portfolio. Each group member's return is measured against a target and up to four benchmarks from the assigned Benchmark Collection.	Company Logo Only	Footer and Performance disclaimer text
Allocation by Category Landscape	Page supporting a single allocation graph displaying the portfolio's allocation on the as of date and sorted by the category selected in the page settings. This larger graph is intended to display more detail than can be provided by the smaller graphs found on the Overview pages.	Company Logo Only	Footer Text Only
Cover Letter	Page supporting a text element. Use this page to write a letter to clients, describe market conditions or give explanations to portfolio returns.	No	Yes
Cover Page Landscape Image Top	Intended to be the cover of a presentation, this page supports one large image with the title of the presentation under the image.	Yes	No
Cover Page with Image	Intended to be the cover of a presentation, this page supports one large image with the title of the presentation above the image.	Yes	No
Cover Page Plain	Intended to be the cover of a presentation, this page does not have an image. Rather, the title of the presentation is positioned in the middle of the page.	Company Logo Only	No
Holdings Page	Summary of the account's positions and value on the as of date selected. This page displays position weight, position symbol, security description, quantity, price and current value on the as of date.	Company Logo Only	Footer Text Only

Working with Presentation Pages

Page Name	Description	Supports Image	Supports Text
Holdings Page 2	Similar to the Holdings Page, this page offers a snapshot of the Portfolio's position on the as of date, but includes additional data, such as Cash Invested, Cost Basis, Unrealized Gain/Loss, and IRR and offers options to display the data in up to three sorting levels.	Company Logo Only	Footer Text Only
Holdings Page by Account	Designed for use with Groups, this page provides a summary of the accounts' positions and value on the as of date selected, sorted by the member portfolios. This page displays position weight, position symbol, security description, quantity, cost basis, price and current value, and unrealized gain on the as of date.	Company Logo Only	Footer Text Only
Mailing Page	Page displaying the mailing address of the client and the return address of the assigned advisor and is formatted for window envelopes for presentations you mail to clients.	No	No
Model vs. Actual Allocation (landscape)	Two pie chart graphs displaying the current allocation on the As Of date compared with the ideal allocation set in the assigned model.	Company Logo Only	Footer Text Only
Overview Five Pane Landscape	Overview of account data broken into five parts, including the portfolio allocation, portfolio value vs. cumulative net investment and performance vs. benchmarks graphs, as well as components of change in portfolio value and portfolio vs. benchmarks data tables.	Company Logo Only	Footer and Performance disclaimer text
Overview Four Pane Landscape 2	Overview of account data broken into four parts, including the portfolio allocation and portfolio value vs. cumulative net investment graphs, as well as components of change in portfolio value and portfolio vs. benchmarks data tables.	Company Logo Only	Footer and Performance disclaimer text
Overview Three Pane Portrait 3	Overview of account data broken into three parts and designed to fit in a portrait page orientation. Data includes the portfolio allocation graph, as well as components of change in portfolio value and portfolio vs. benchmarks data tables.	Company Logo Only	Footer and Performance disclaimer text
Overview Three Pane Landscape 2	Overview of account data broken into three parts and designed to fit in a landscape page orientation. Data includes the portfolio allocation graph, as well as components of change in portfolio value and portfolio vs. benchmarks data tables.	Company Logo Only	Footer and Performance disclaimer text

Working with Presentation Pages

Page Name	Description	Supports Image	Supports Text
Overview Three Pane Landscape	Overview of account data broken into three parts and designed to fit in a landscape page orientation. Data includes the portfolio allocation graph, as well as components of change in portfolio value and portfolio vs. benchmarks data tables.	Company Logo Only	Footer and Performance disclaimer text
Overview Three Pane Portrait 2	Overview of account data broken into three parts and designed to fit in a portrait page orientation. Data includes the portfolio allocation graph, as well as components of change in portfolio value and portfolio vs. benchmarks data tables.	Company Logo Only	Footer and Performance disclaimer text
Performance Two Pane Landscape	This performance data page offers components of change in portfolio value as well as TWR, Target and up to four Benchmark returns from the benchmark collections for several periods.	Company Logo Only	Footer and Performance disclaimer text
Portfolio Overview	Overview of account data broken into four parts, including the portfolio allocation and portfolio value vs. cumulative net investment graphs, as well as components of change in portfolio value and portfolio vs. benchmarks data tables.	Company Logo Only	Footer and Performance disclaimer text
Portfolio Overview Portrait	Account data broken into three parts, including current asset allocation graph sorted by asset class, a review of returns for the Portfolio, Target and up to four benchmarks from the assigned Benchmarks Collection, as well as a summary of activity or a components of change in portfolio value for the same time periods as the returns sections.	Company Logo Only	Footer and Performance disclaimer text
Portfolio Value vs. Cumulative Net Investment Landscape	Page supporting a larger Portfolio Value vs. Cumulative Net Investment graph situated in landscape orientation to display more information.	Company Logo Only	Footer and Performance disclaimer text
Position Performance Summary	Page displaying position performance data. It is intended to be used for groups and is sorted by member portfolio. Data displayed on this page is: security description, beginning value, additions, withdrawals, realized gain/loss, unrealized gain/loss, income/expenses, end value and actual/annual net IRR calculations.	Company Logo Only	Footer and Performance disclaimer text
Report Disclaimers	Page supporting a text element. Use this page to write a letter to clients, describe market conditions or give explanations to portfolio returns.	Company Logo Only	Yes

Working with Presentation Pages

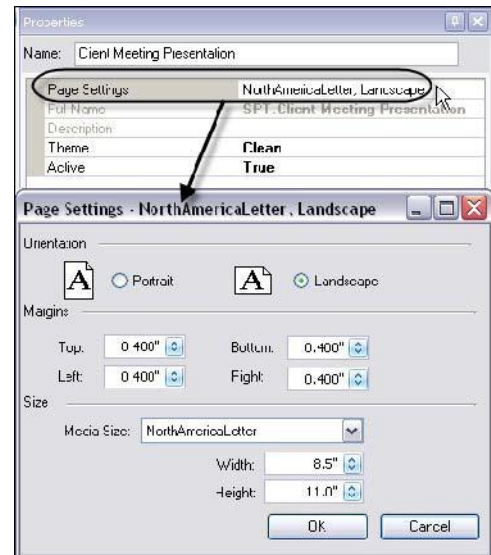
Editing Page Settings and Descriptions

Editing Page Orientation

Page orientation is an important part of the presentation layout. For the most part, unless otherwise set, page orientation comes from the presentation level.

In the presentation settings, the Page Settings option controls the page orientation, margin and paper size printer settings set as the default.

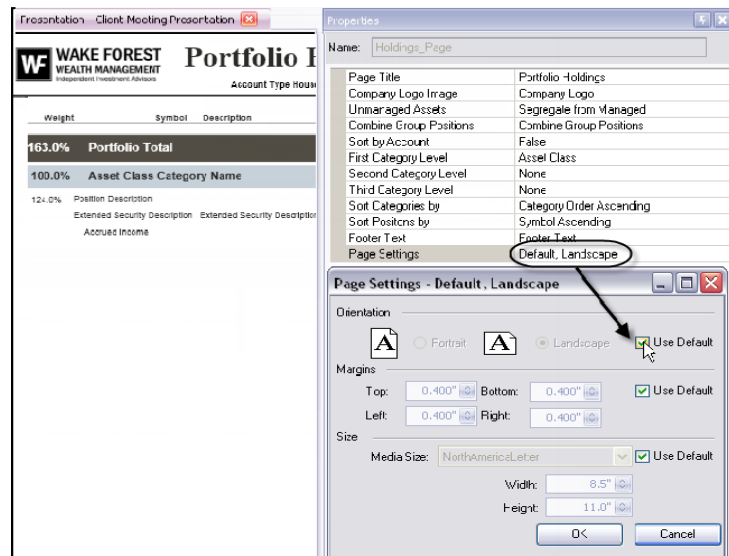
If you find you have to change the page orientation for the presentation as a whole, change the setting on the presentation level first to set it as the default for the entire presentation.



As for the individual pages, however, we've taken the guess work out of it for you by providing you with pages designed for either portrait (8 1/2" x 11") or landscape (11" x 8 1/2") orientation.

On the pages specifically formatted for portrait, the word "Portrait" should appear in the page name. Likewise with landscape – pages specifically created for landscape page orientation should be labeled "landscape" in the page name.

If you find, however that you need to modify page orientation settings for a specific page, select that page in the navigator on the left and then click the browse box in the page settings option.



The Page settings dialog box opens for that page. Initially, the **Use Default** box is checked and all the settings are grayed. To modify the settings, uncheck the **Use Default** boxes and make any settings changes you need for that page within the dialog. Click **OK** in the dialog box to change the settings.

The settings you select for this page apply only to the presentation you currently have open and are only applied once the changes to the presentation have been saved.



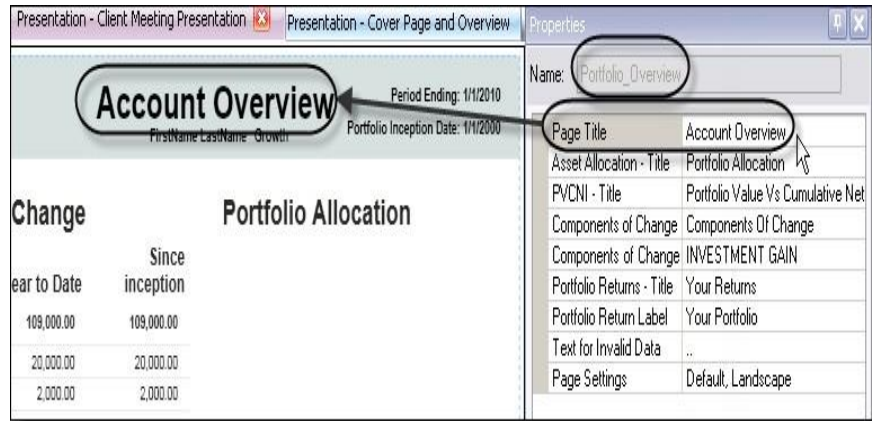
Note

If the Use Default box is gray for a specific page setting, you cannot edit the page orientation of that particular page due to content restrictions, even if the page orientation for the entire presentation is changed.

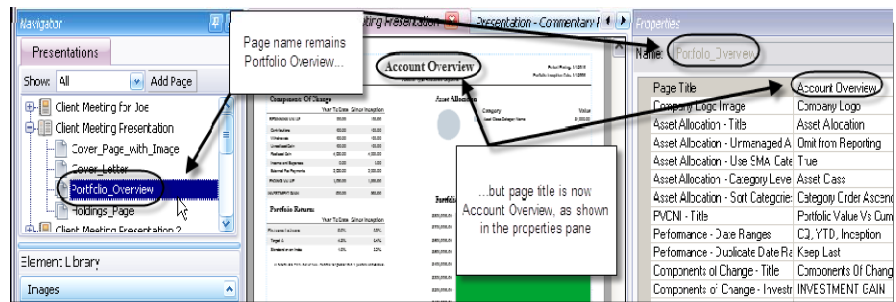
Working with Presentation Pages

Editing Page Titles

You can customize the title of the pages within a presentation. This way, you can have the title that is most meaningful to your clients display at the top of the page. For example, if you refer to the portfolios as Accounts to your client, you can change the title of the Portfolio Overview page to read “Account Overview” as shown in the example to the right.



As soon as you save the changes to the presentation, the title changes appear in the preview section in the middle pane. An important note, however, is that the page name itself does not change. The page name, as you’ll find when building or modifying presentations can not be edited.

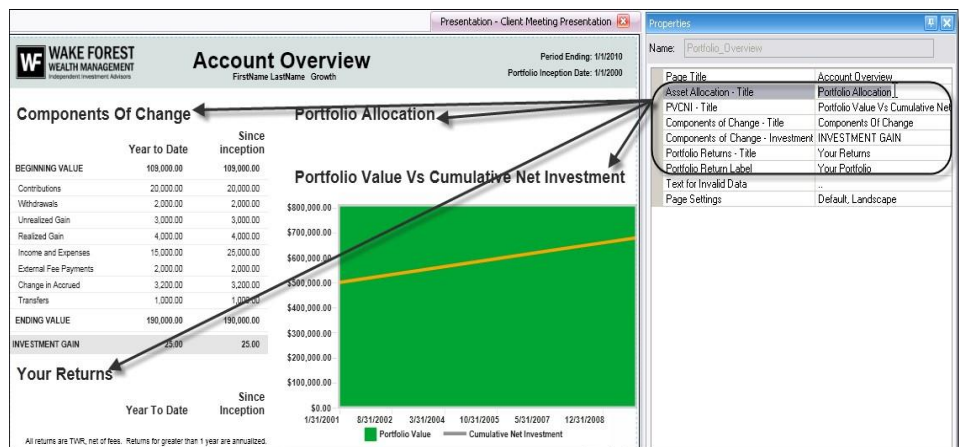


This way, you know you’ll always be able to start with the same beginning settings – or from “default” if you ever forget the changes or cannot make the settings you entered work for some reason.

Editing Section Titles

The settings you can edit depend on the page you are editing, but the principal of editing the page settings are the same.

To edit the page settings and descriptions, open the presentation and then click on the page you want to edit. In the example to the right, we have opened an Overview page to edit the titles for each section.

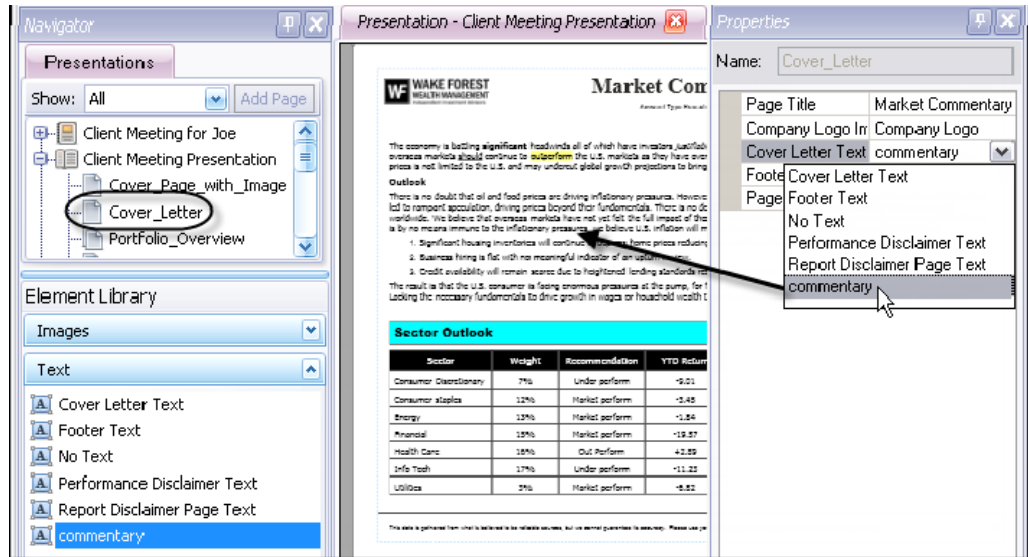


Using the example above, you can edit the titles of each of the four main sections: Asset Allocation, PVCNI Title, Components of Change title and the Portfolio Returns title. We have edited the Asset Allocation title to be Portfolio Allocation and the Portfolio Returns title to be Your Returns. In addition to the section titles, you can edit the label for the Investment Gain and Portfolio Return calculations.

Working with Presentation Pages

Editing Image and Text Element Selections

Certain pages support the addition of text or image elements. You have to create the text and image elements, and then, in the page settings, select the image or text element you want to appear on the page or in the selected section of the page.



For more information about creating text elements, see the Working with Text Elements section starting on page 31. For more information about creating image elements, see the Working with Image Elements section starting on page 37.

Working with Presentation Elements

Elements give you an additional layer of customization that allows you to give the presentation your brand. This chapter discusses each of the three types of elements, how to create or modify them, and where to use them on pages.

What are Presentation and Page Elements?

Presentation and page elements are saved pieces of data you can use to customize the Client Presentations, either with customized color, images or text. There are two types of elements: Presentation Elements and Page Elements.

What Are Presentation Elements?

These are elements that are applied only on the presentation level and affect all pages within the presentation. Currently the only presentation level element is the theme. Theme elements control several aspects of the overall appearance of the page, including:

- ◆ Page background color
- ◆ Category and Graph colors
- ◆ Font styles for headers and titles

Currently, you can only modify colors of existing themes. There are currently nine themes available. See the Working with Theme Elements section starting on page 22 for a list of themes and examples of each.

What Are Page Elements?

These are elements that are applied only on the page level and affect only the page with the assigned element. Currently, there are only two page elements: text and image elements. Only pages that are specifically designed to support image or text elements can use them. See the Pages Available in this Version section starting on page 15 for a list of pages that support text or image elements.

- ◆ Text Elements – these elements are blocks of text, tables or images you have added to pages supporting text elements. Use the built-in rich-text editor to customize and format the text you create, or copy and paste text, tables, or images from other word processing or rich-text editing applications. For more detailed information about working with Text Elements, see Working with Text Elements section starting on page 31.
- ◆ Image Elements – these elements are .JPG, .PNG or .BMP images you import into the database and add to pages supporting images. Currently, there are no editing tools for images in Presentation Studio. For more detailed information about working with Image Elements, see Working with Image Elements section starting on page 37.

This chapter shows you how to work with each of these three types of elements.

Working with Presentation Elements

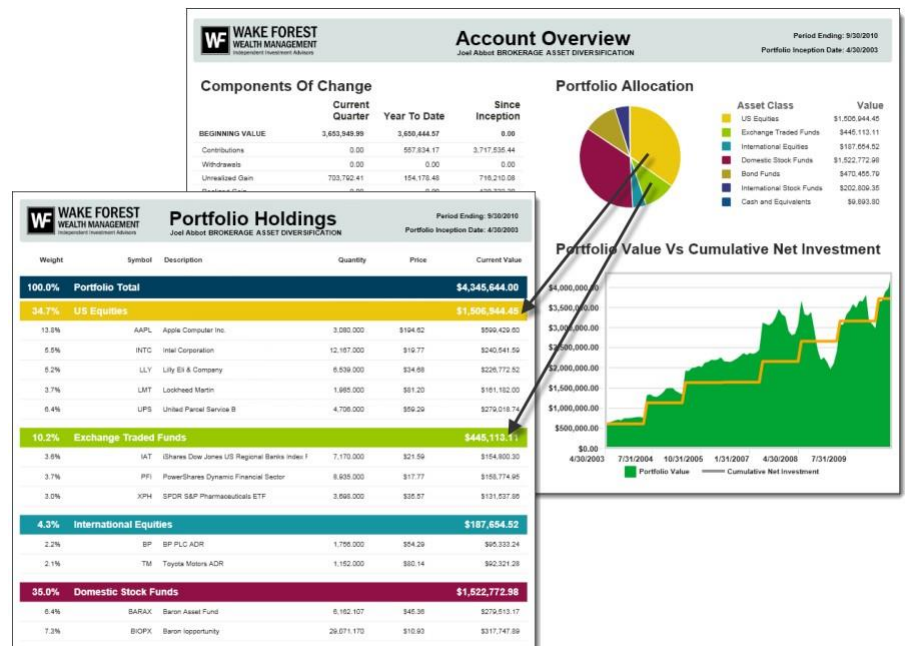
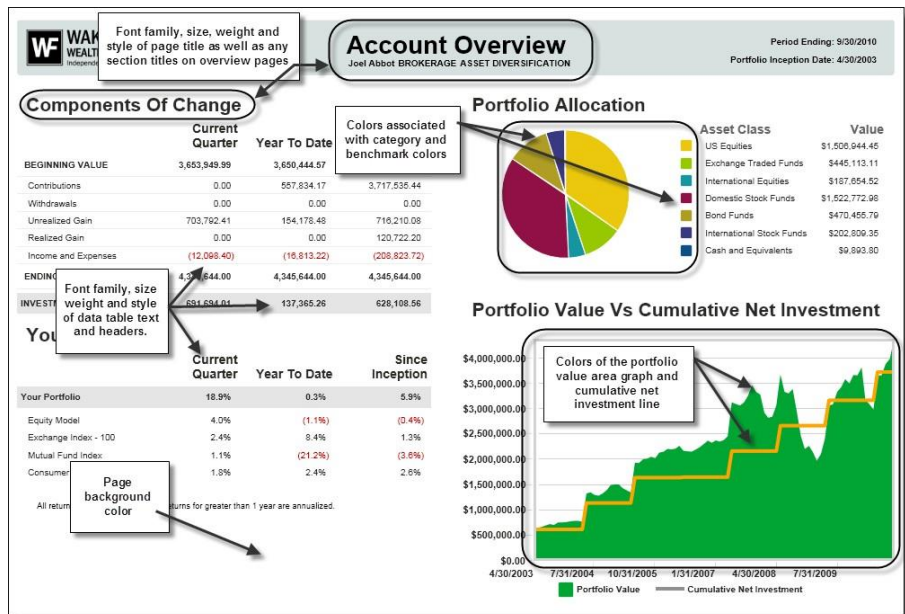
Working with Theme Elements

Theme elements can be customized to add your color scheme to the pages. This section describes what is controlled by the theme and shows you how to edit these items.

What is a Theme?

The Theme Element is set at the presentation level and is applied to all the pages within the presentation. The theme controls:

- ◆ Page background colors applied throughout the presentation pages. In most cases, the color is white, but there are three themes providing pages with a gradient background color.
- ◆ Page title bars – all but one theme provides you with title bar colors. Some themes provide a pattern or gradient, while others provide a solid background color.
- ◆ A color palette that can be applied to both category and benchmark colors, providing a cohesive color scheme throughout the presentation. This is especially helpful when you are using a Portfolio Allocation graph in conjunction with a Portfolio Holdings or Position Performance page that sorts the information by the same category.
- ◆ Font family, style, weight and size for all titles and data tables.
- ◆ The colors of the Portfolio Value vs. Cumulative Net Investment graph.



Working with Presentation Elements

Current Theme Options

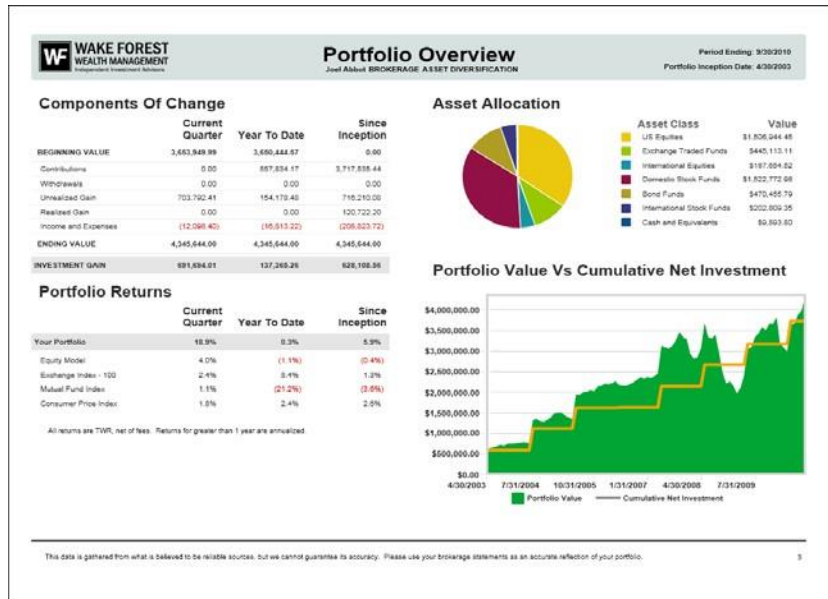
Currently, there are nine theme options, listed in the section below.

Block Theme

The block theme provides you with a white page background and a light-green block in the title bar.

The default color palette contains twenty bold, solid colors for the categories and benchmarks, while the Portfolio Value vs. Cumulative Net Investment graph is a bright green color with a contrasting yellow line, making it easy to see the distinction.

Finally, the font family assigned to this theme is the default Sans Serif font. For most users, this font is usually Verdana or something similar, like Arial.

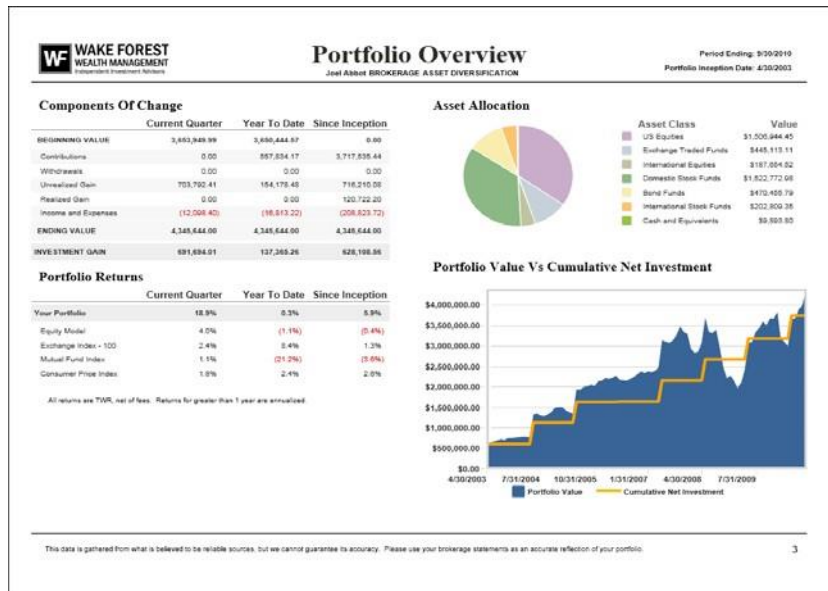


Clean Theme

The clean theme provides you with a solid white page background and title bar.

The default color palette contains twenty pastel, solid colors for the categories and benchmarks, while the Portfolio Value vs. Cumulative Net Investment graph is a blue color with a contrasting yellow line, making it easy to see the distinction.

Finally, the font family assigned to this theme is the default Serif font. For most users, this font is usually Times New Roman or something similar like MS Serif.



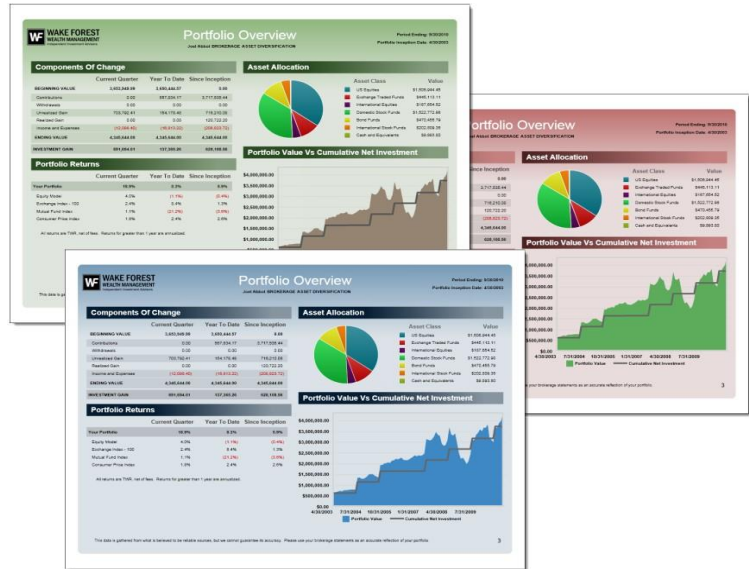
Working with Presentation Elements

Ocean Themes

The ocean themes provide you with a choice of three (blue, burgundy and green) gradient page background colors and section title bars on the overview pages.

The default color palette contains twenty vibrant, gradient colors for the categories and benchmarks, while the Portfolio Value vs. Cumulative Net Investment graphs range from blue, green or brown background with a gray line for the contributions.

Finally, the font family assigned to this theme is the default Sans Serif font, usually Verdana or something similar like Arial.



Color Themes

The Color themes provide you with a white page and a choice of four page frames (solid tab, solid tab with pattern, gradient bar, gradient bar with pattern).

The default color palette contains twenty bold, solid colors for the categories and benchmarks, while the Portfolio Value vs. Cumulative Net Investment graph is blue with a contrasting yellow line for the contributions.



Finally, the font family assigned to this theme is the default Sans Serif font, usually Verdana or something similar like Arial.

Working with Presentation Elements

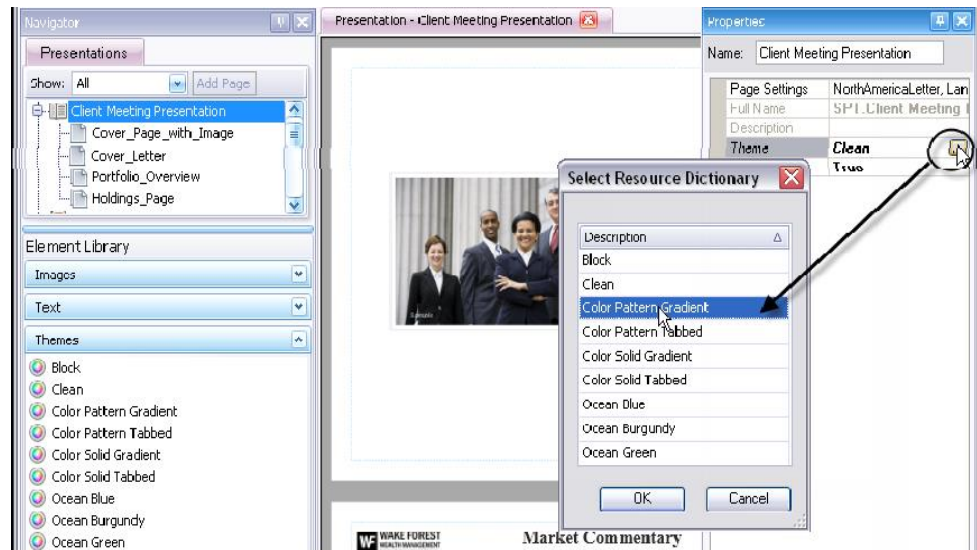
Assigning a Theme to a Presentation in Presentation Studio

The theme is selected on the presentation level. Follow the steps below to change the theme setting for the presentation. All the following steps assume you have Presentation Studio already open. If you do not have Studio open, see the Opening Presentation Studio section starting on page 5.

- 1 Open the presentation you want to edit.

To open the presentation, click on the presentation name, double-click the presentation name, or right-click it and select **Open** from the menu. A new tab should open in the preview pane.

- 2 With the name of the presentation selected, look in the Properties pane to the right of the presentation preview.



- 3 Click the browse button to the right of the **Theme** setting, similar to the example to the right.
- 4 The Select Resource Dictionary dialog box opens. Select the theme you want to use, and then click **OK**.
- 5 Right-click on the tab and select **Save** or click the **Save** or **Save All** button to save the changes.

Working with Presentation Elements

Modifying Themes in Presentation Studio

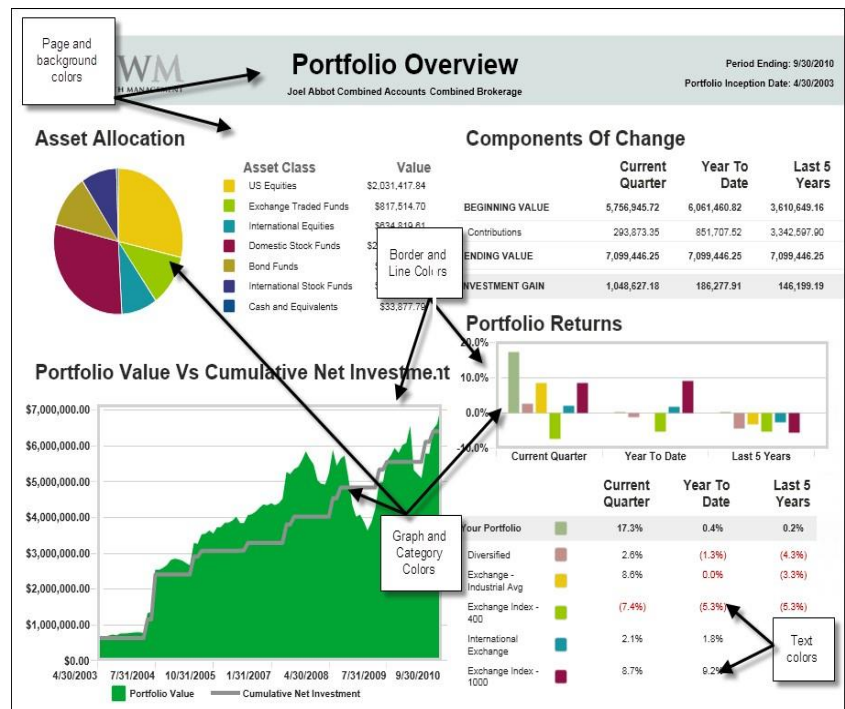
If you have a specific color palette you are trying to match, you have the ability to edit colors of certain parts of the pages that are controlled by the theme. Before you get started with editing themes, however, you should understand a few things that could impact more than one presentation:

- You cannot undo any modifications you make to a theme, so it is very important to carefully select the theme you are going to use as your basis and plan any changes you make to the presentation. If you haven't done so already, review the Current Theme Options section starting on page 23 or the presentation specifications at <https://tamaracpc.com/public/spt/client-news-and-resources/portfolio-center-report-presentations/gallery-portfolio-center-report-presentations> for details about each available theme.
- Become familiar with the styles in the theme you have selected and the pages affected by the style you want to modify. Not all pages are affected by all styles and not all themes have all styles exposed.
- Because you cannot undo any changes you make, it is a best practice to copy an existing theme, and then make edits to the copy of the theme. See the Copying an Existing Theme section starting on page 28 for steps to copy the selected theme.
- Finally, make the changes you need to the styles you have selected. See the Editing an Existing Theme Color Palette section starting on page 29.

Current Theme Style Options

The current theme style options can be broken down into four basic categories:

- Page and Background Colors – these styles affect the coloring you might see in backgrounds or on rows. For examples of these styles, see the Page and Background Styles section starting on page 27.
- Text Colors – these styles affect the color of text on certain areas of the page. The only exception is the color of any text element you might select on certain pages. For examples of these styles, see the Text Styles Colors section starting on page 27.
- Border and Line Colors – these styles affect the coloring you might see on borders around graphs or certain areas of overview pages. For examples of these styles, see the Border and Line Styles Colors section starting on page 27.
- Graph and Category Colors – these styles affect the coloring you might see on pie charts, bar charts and area graphs. For examples of these styles, see the Graph and Category Colors section starting on page 28.



Working with Presentation Elements



On the Web

This document only lists the theme styles that can be edited and how to change the color.



Important

Some pages have options that allow you to sort by one of the three category types or by security type. In category details, you can select the color palette number you want to use for the allocation graph and holding and position summary pages. However, you do not have these settings available in the security type details. The security type color assignments are fixed. To see the table of fixed assignments for the security types, see the Fixed Palette Assignments starting on page 28.

Page and Background Styles

The styles for Page and Background colors affect the page color, background colors for headers and background colors for certain pages. The following style colors can be edited:

- ◆ Cover Page Background
- ◆ Row Background
- ◆ Portfolio Total Background
- ◆ Element Header background
- ◆ Page Header Background
- ◆ Row Alternating Background
- ◆ Managed Assets Total Background
- ◆ Color Pallet Entry 1 – 50
- ◆ Page Footer Background
- ◆ Row Total Background
- ◆ Account Total Background

Text Styles Colors

The styles for Text Colors affect the color of the text available on all pages except for the areas where text elements are selected. The following style colors can be edited:



Note

The font family and style that is selected for the body of reports cannot be edited, only the color of that font. It is also important to note that colors you select for body and header text here do not affect the font family, style and color represented in the text elements. All those settings are set in the text element details. For more information about editing text elements, see the Working with Text Elements section starting on page 31.

- ◆ Cover Page Title
- ◆ Body Text
- ◆ Portfolio Total Text
- ◆ Overview Page Element Title
- ◆ Page Header text
- ◆ Negative Number
- ◆ Category Grouping Text
- ◆ Performance Period Column
- ◆ Client Name and Date
- ◆ Holdings Report Column Header
- ◆ Account Header Text

Border and Line Styles Colors

The border and line style colors affect borders and lines around certain areas, usually around graphs or images. The following style colors can be edited:

- ◆ Cover Page Image Border
- ◆ Overview page element underline
- ◆ Cover Page Image Outline
- ◆ Asset Allocation Chart Outline
- ◆ Row Separator Line
- ◆ Chart Border

Working with Presentation Elements

Graph and Category Colors

The graph and category colors affect the colors you see in graphs and on holdings and position performance pages. The following style colors can be edited:

- ◆ Other Category
- ◆ Cumulative Net Investment
- ◆ Portfolio Value Graph
- ◆ Color Palette Entry 1 – 50
- ◆ Portfolio Return
- ◆ Target Return

Fixed Palette Assignments

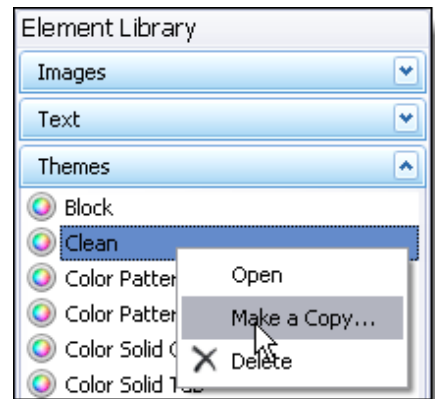
For some presentation pages, you have the option to display positions by security type. However, unlike asset class, sector and subsector codes, you do not have the ability to assign colors to security types. They are hard coded in the program. In the chart below, the number to the right of the security type indicates the color palette entry number assigned to each security type:

- ◆ Equity – 1
- ◆ Fixed Income – 2
- ◆ Mutual Funds – 3
- ◆ User Defined – 4
- ◆ CDs – 5
- ◆ Mortgage-backed – 6
- ◆ Unit Trust – 7
- ◆ Options – 8
- ◆ T-Bills – 9
- ◆ Commercial Paper – 10
- ◆ Cash – 11
- ◆ SMA - 12

Copying an Existing Theme

You can make copies of existing themes so you can preserve the original before editing the colors associated with it. Follow the steps below to make a copy of an existing theme. These steps assume you already have Presentation Studio open.

- 1 In the Element Library, located on the navigation pane, click the Themes bar to expand the list of themes.
- 2 Right-click on the theme you want to copy and select **Make a Copy...** from the menu, as shown in the example on the right.



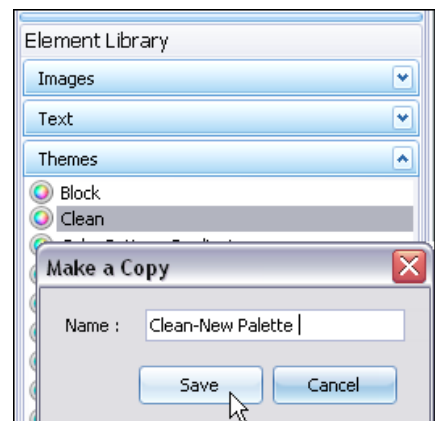
- 3 The Make a Copy dialog opens. Enter a name for the new theme in the **Name** field.

The best practice is to name the copy of a theme to include the name of the theme you are copying from so you can reference the original another time.

In this example, we are creating a copy of the Clean theme, so we have named the new theme Clean-New Palette.

- 4 Click the **Save** button to save the copy of the theme.

The new theme will now appear at the bottom of the list of themes in the Element Library.

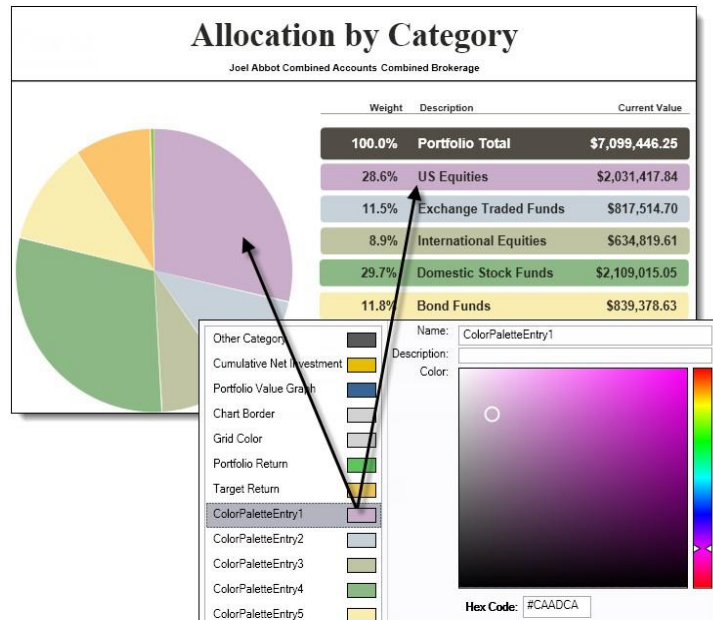


Working with Presentation Elements

Editing an Existing Theme Color Palette

There are many reasons why you might want to edit the color palette for an existing theme, but the most common reason will be to either add to or modify the colors for the Color Palette Entries. These styles control the colors for the pie pieces on the allocation graphs as well as the colors of the bars for the category sorting on Holdings Reports. Other common colors to edit are the:

- ◆ “other” category for allocation charts that are not large enough to show all categories
- ◆ area and line graphs on the Portfolio Value vs. Cumulative Net Investment graph
- ◆ portfolio and target returns that appear on the Performance vs. Benchmarks graph



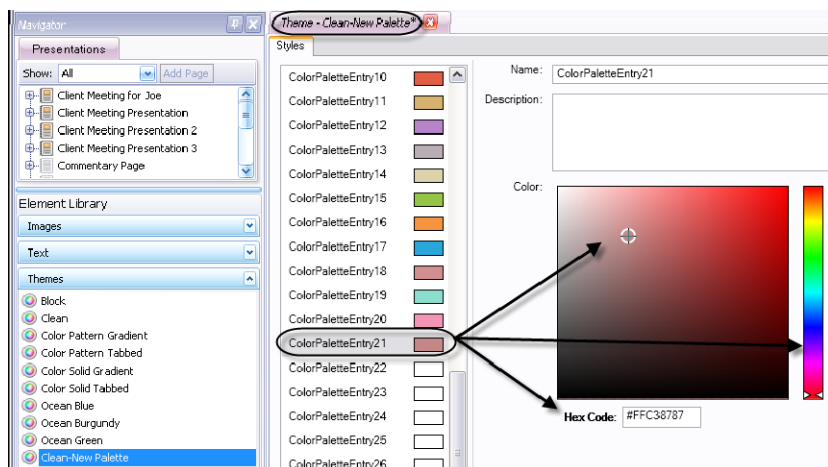
This section shows you the parts of the theme you can edit and how to change the colors.



Important Notes

- ◆ Changes cannot be undone nor can you revert back to default settings easily. It is strongly recommended that you make a copy of the themes before you made changes to them. Follow the steps in the Copying an Existing Theme section starting on page 28 for step-by-step instructions for creating a copy of a theme.
- ◆ You can only assign solid colors to items in the themes. Thus, if you are editing a color that begins as a gradient, such as is the case in the Ocean themes, you can only replace it with a solid and you cannot undo the change once you have changed it.
- ◆ The Name and Description of the style cannot be edited or changed.

- 1 From the Element Library, located on the bottom left of the Navigator pane, click the bar labeled Themes to see a list of the available themes.
- 2 Double-click the theme you want to edit to open it in the Preview Pane. Remember, it is best to edit a copy of a theme. If you have not already done so, make a copy of the theme you want to edit. For steps to create a copy of a theme, see the Copying an Existing Theme section starting on page 28.



- 3 In the Preview Pane, the Styles menu appears, similar to the example on the right. Select the style you want to edit from the list. In this example, we are going to edit the Color Palette Entry 21.

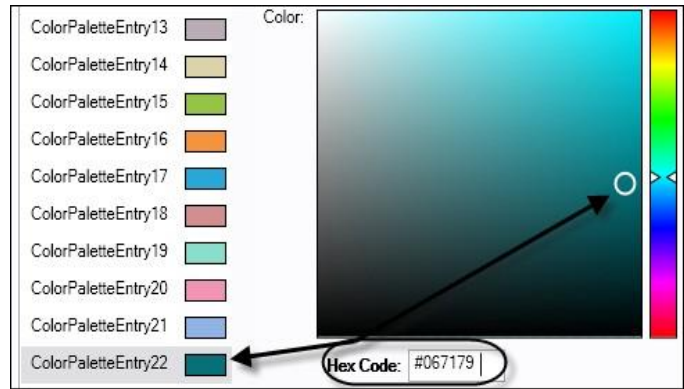
Working with Presentation Elements

- 4 Select the color you want to assign to the Style. There are two ways to select the color:

Enter Hex Code:

If you have a hex code from your graphic designer, enter it into the Hex Code field below the color selector, similar to the example to the right.

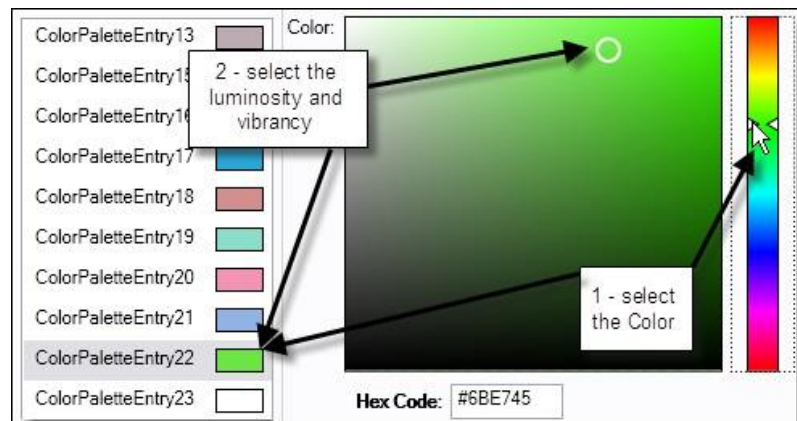
As you enter the code, you'll see that the color square displays the color represented by the Hex Code you entered.



Select color from the Color Picker:

The other option you have for selecting a color for the selected style is to use the color picker. Use the guidelines below to select a color using the color picker tool:

- ◆ Use the sliding bar on the right of the window, select the base color or hue. As you move the slider up and down, you should see the colors in the large square change.
- ◆ After finding the overall color you want, use your mouse to point to different areas inside the large square to select the vibrancy (saturation) and the brightness (luminosity) you want.



As you move the mouse around in the area, the color changes for the style you have selected and the Hex Code changes to indicate the Hex Code for the color you've selected, similar to the example above for Color Palette Entry 22.

- 5 Once you have selected all the colors for styles you want to change, click the Save button and assign the theme to the appropriate presentation to test the colors.

Working with Presentation Elements

Working with Text Elements

One of the more powerful features of Presentation Studio is the ability to add customized, formatted text to presentations. The Presentation Studio offers many rich-text editing tools to help you create, copy, and format this text to insert into pages supporting text elements. This section shows you the many text editing tools and options for creating and working with text elements on supported pages.

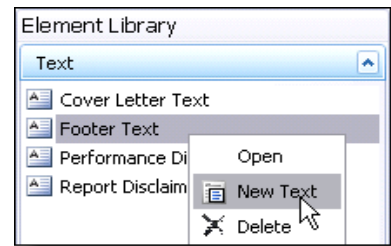
What are Text Elements?

Text elements are saved blocks of text you can insert into supported pages or sections of pages. You can create as many text elements as you need, and then assign them to supported pages as necessary.

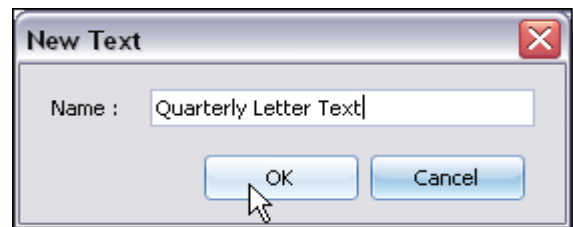
Creating New Text Elements

You can create as many new text elements as you need and store them for use on different presentations. The steps below assume you already have Presentation Studio open. If you do not, see the Opening Presentation Studio section starting on page 5.

- 1 Under the Navigator pane on the left side, locate the **Element Library** pane.
- 2 Click the bar labeled **Text** to display the existing text elements.
- 3 Create a new text element – you can either right-click inside the text element library, or you can click the New button above the Navigator Pane and select **Text** from the menu.



- 4 The New Text dialog box opens with “untitled text” as default text in the name field.
Enter the name of the text element you want to create, similar to the example to the right.
- 5 Click **OK** to save the changes.



Note

You cannot name the new text element with an existing text element name so always use a unique name for a new text element. Once a text element is named, you cannot go back and rename the text element. If you want to change the name of a text element, you must delete the existing text element and create a new text element using the desired name.

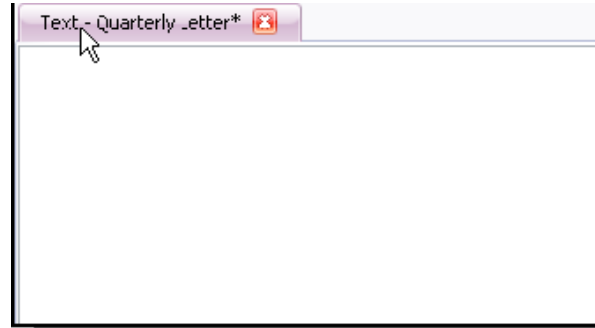
Working with Presentation Elements

- 6 The new text element opens in the preview pane in the center. You can either paste prepared text from another application, such as a Word Processing or another rich-text editor application.

Make any format changes you need to make to modify or customize the text.

- 7 Save the changes. You can either right-click the tab and select **Save** from the menu or click the **Save** or **Save All** buttons.

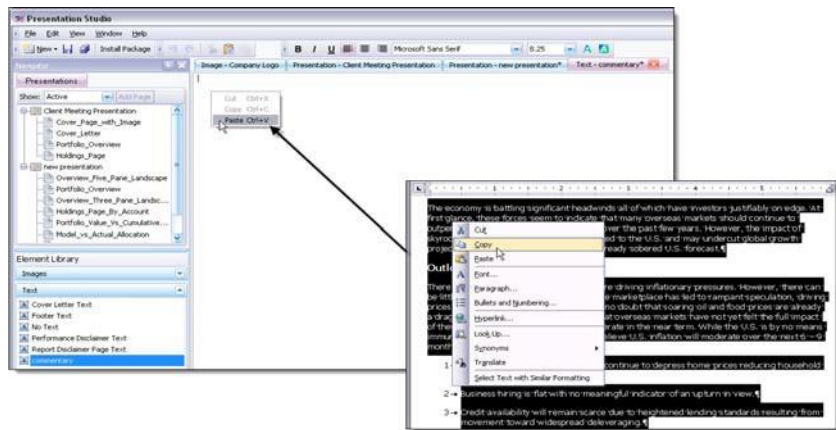
- 8 Insert the text element into an appropriate page in your presentation.



Copying Text from another Source to a Text Element

The most useful aspect of the Cut, Copy and Paste features is that you are able to copy formatted text from other sources, such as Microsoft Word, and then paste that information into the text editor.

The ability to copy from other sources gives you the option of having formatted tables, bulleted or enumerated lists and other images that can be incorporated into the presentations.



For example, let's say that you have a document you've created in Microsoft Word that contains a bulleted list and a table, similar to the example on the right. Copy the information from the Microsoft Word document, and then, in Presentation Studio, paste it into the blank Text Element.

As a best practice

1. Craft any text document containing tables or bulleted or enumerated lists in a Word Processing application – such as Microsoft Word
2. Paste the text, tables and lists created in the Word Processing application into another rich-text editing application – such as WordPad – to see how it will appear before pasting it into the text element in Presentation Studio.

Working with Presentation Elements

Using the Rich-Text Editing Tools for Text Elements

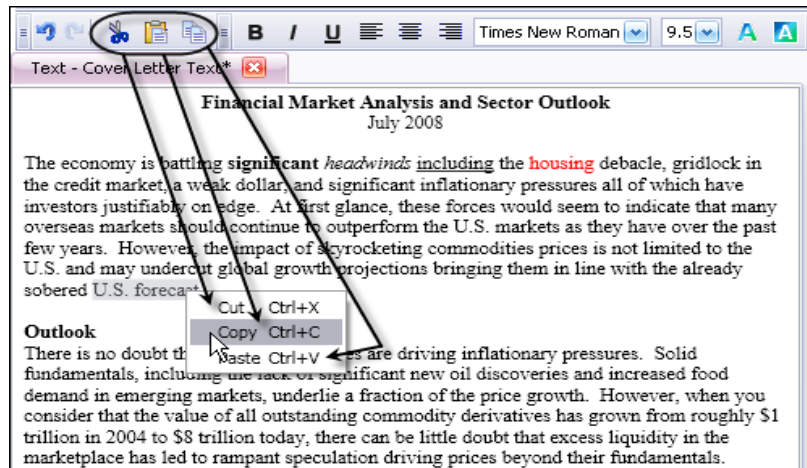
The rich-text editing tools for text elements help you customize and highlight important information for your client by using formatting techniques such as bold or underline or changing the size of font for a specific word or title. You can also use cut, copy and paste techniques to help you edit the text more quickly on the page. This section describes each of the text editing tools you have at your disposal in Presentation Studio.

Cut/Copy/Paste

Probably the most convenient and useful tool for the rich text editor, the Copy, Cut and Paste functionality allows you to quickly add and move text on the page.

There are three options for accessing the Copy, Cut and Paste functions:

- ◆ Right-click – select text or place the cursor in the location you want to paste the information and right click. You'll see a menu, similar to the one on the right, giving you the options available to you.
- ◆ Tool bar buttons – these icons, located above the tab name in Presentation Studio, look very similar to the same button functions you see in other rich text editors or even in Word. The buttons are visible when the functionality is available. For example, when you select text, the Cut and Copy buttons are available.
- ◆ Keyboard Shortcuts – Also similar to the keyboard shortcuts you are probably already using in another rich-text editor. They can save you time by allowing you to use two key strokes to quickly Cut, Copy and/or Paste the text.



Notes

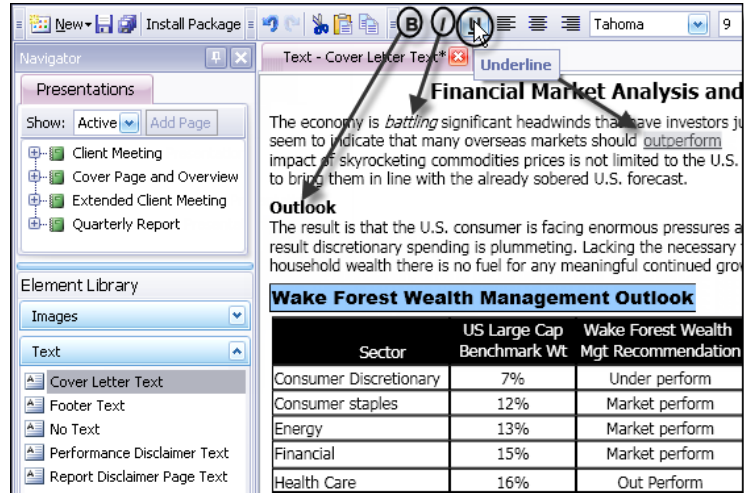
- ◆ At this time, the full page text elements – Commentary and Disclaimer – only allow for a single printed page at a time. Any data that goes beyond the one printed page will be truncated, but in version 5.1, you can copy the truncated text to a second text element and add it to an additional copy of a full text page to create paginated text pages. It is best to always have a Presentation open and look at the preview of the presentation to ensure you are able to fit the data in, or make adjustments to it accordingly.
- ◆ If you are copying text and formatting from a Word document, it is a best practice to copy the text into Wordpad first to test how it might appear in Presentation Studio. Some formatting may not come over exactly the same in a rich-text environment as it does in Word.

Working with Presentation Elements

Bold/Underline/Italic

From time to time, you might find it helpful to place additional emphasis on certain words in the document. Use the Bold, Italics or Underline features to accomplish this task.

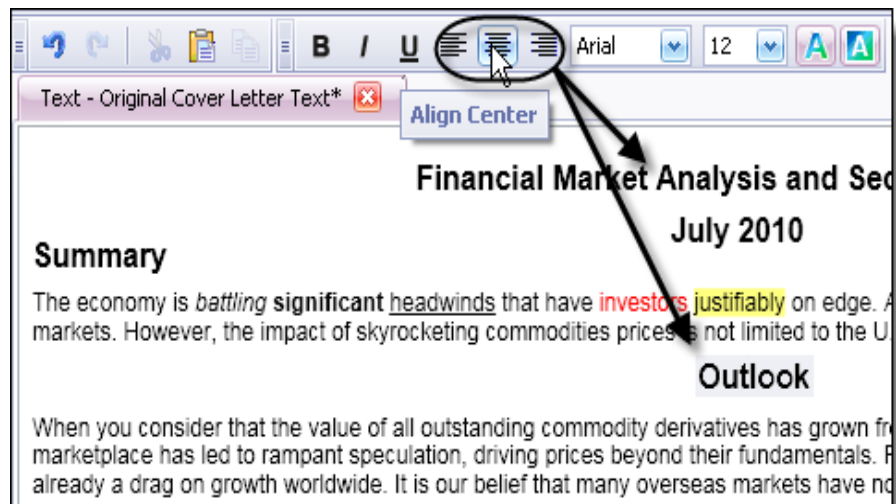
For example, let's say you wanted to emphasize the word "Outlook" in the text on the right. Select the text, and then click the Bold button in the menu above.



Text Justification or Alignment

Sometimes, the placement of the text can set apart various sections or give certain text more emphasis. Use the Text Align buttons to move a block of text to the location you want it to appear.

For example, let's say that you want all of the titles for sections on a page to appear in the center, but the rest of the text to start on the left side. You'd use the Center Align – similar to the image on the right – for the titles and the Left Align for all other text.

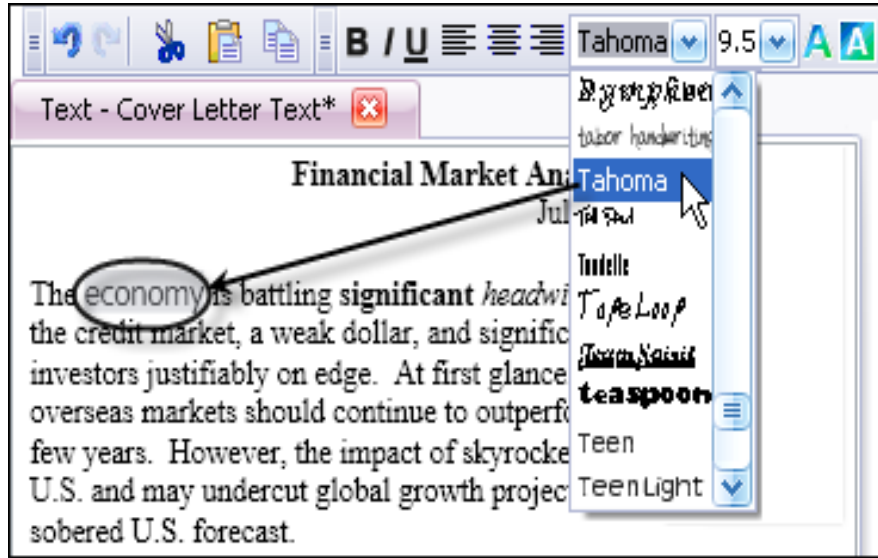


Working with Presentation Elements

Font Style

You have taken special care to develop a brand, and you want to extend that brand to your commentary pages. You have the font style selection tool at your disposal to add an additional layer of customization to your Presentations.

To change font style, select the text you want to change, and then click the down arrow to the right of the font style selector box. All fonts you have installed on your computer are listed in this box. This box is located to the right of the Text Alignment/Justification settings on the tool bar.



Tip

Font style changes apply only to the text element you are editing. Thus, if you select something dramatically different from the font associated with the theme, the body text on this one page will not match the heading, titles and body text of any other page in the presentation. If you change font for this page, be sure to select something that will coordinate with text on the other pages in the presentation.

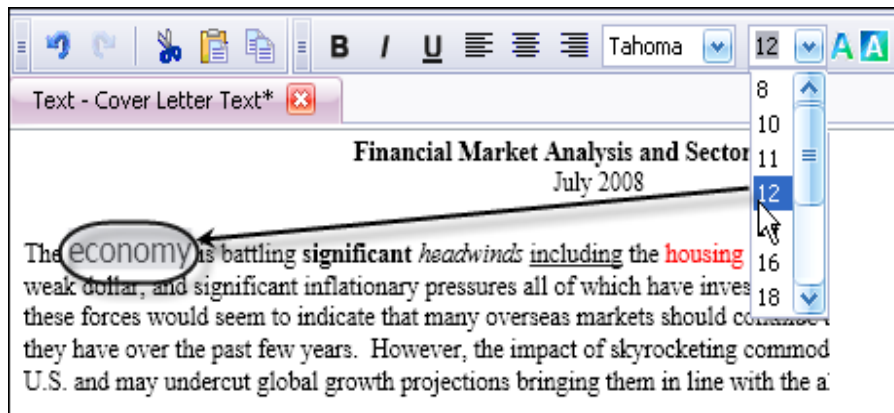
Also, font styles have various spacing options, and some are larger than others and the information could be truncated. Always be sure to check the preview to ensure all the information still appears on the single page after you modify the font style.

See the Current Theme Options section starting on page 23 for information about the type of fonts assigned to each theme.

Font Size

You might have clients that require a larger print or maybe you want to make the print smaller to fit more information onto a page.

You can change the font size by selecting the text you want to change, and then clicking the down arrow to the right of the font size selector. This setting is located to the right of the font style selector on the tool bar.



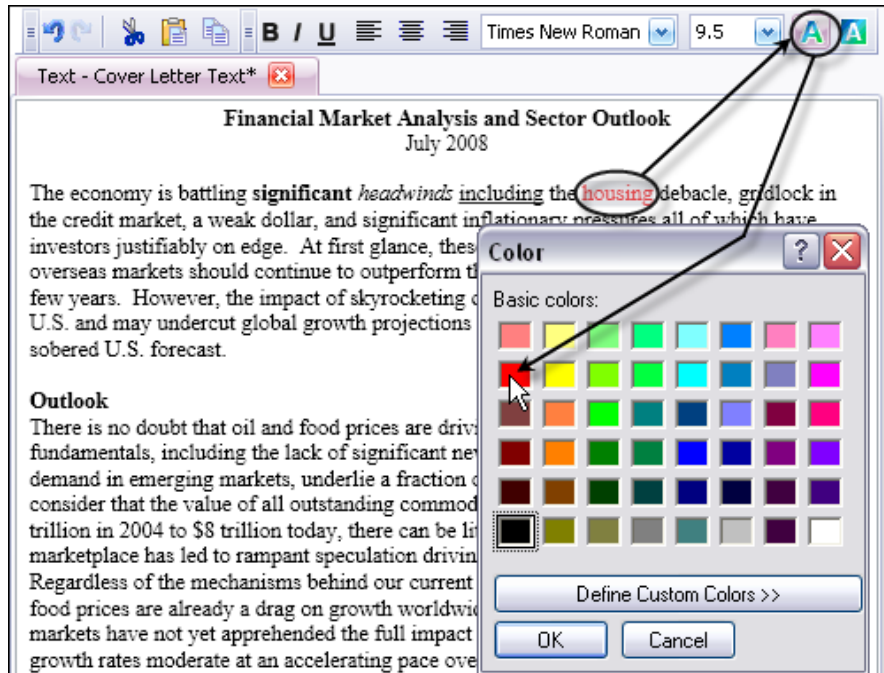
Working with Presentation Elements

Font Color

In addition to setting text apart with bold, underline or italics, you can also emphasize text with color.

To make a change in the color of the text, select the text you want to change, and then click the Change Color button, located to the right of the Font Size button.

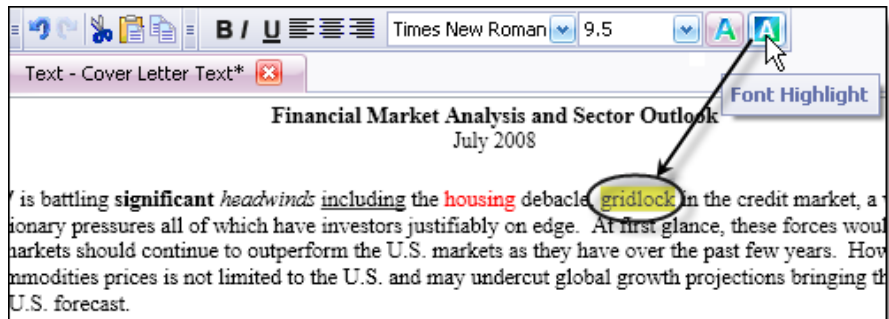
When the Color dialog opens, similar to the image on the right, you can either select from the palette of basic colors, or define a custom color by clicking the Define Custom Colors button.



Font Highlight

One last way to ensure clients can quickly identify or differentiate words or text is to highlight them. Highlighted area, similar to the example on the right, is the space immediately around the text.

To highlight text, select what you want to highlight and then click the Font Highlight button.



The Font Highlight button is located to the right of the Font Color button on the tool bar. When you click the Font Highlight button, a Select Color box, similar to the one you see in the Font Color section, opens prompting you to select the color of the highlight. Select the color and then click OK.

Working with Presentation Elements

Working with Image Elements

Image elements can help you enhance and customize client presentations by adding pre-defined images, such as a company photo or logo to client presentations. This section discusses adding and working with image files.

What are Image Elements?

Image elements are saved images you can use on a range of pages that support them. Presentation Studio supports three file types:

- ◆ .JPG
- ◆ .BMP
- ◆ .PNG



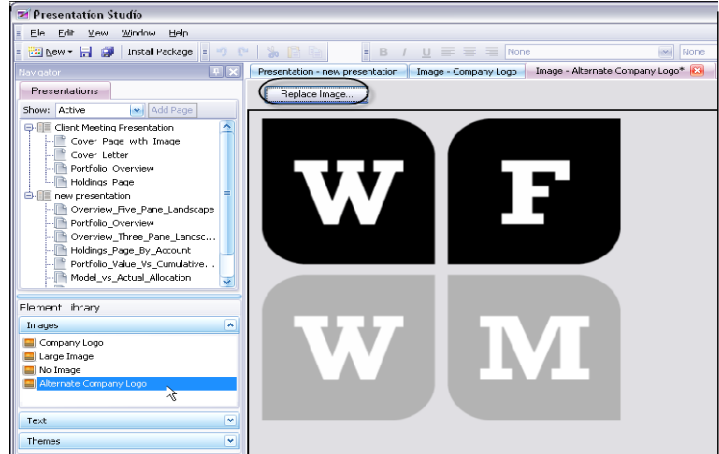
Create the image element in Presentation Studio, and then assign the image element to a page. Image elements are associated with pages independently within each presentation. The sections below show you how to replace existing image elements as well as create new image elements, and then assign them to pages.

Working with Presentation Elements

Replacing Image Elements

The best place to start is to work with the two image elements provided: company logo and large image. The steps below assume you already have Presentation Studio open.

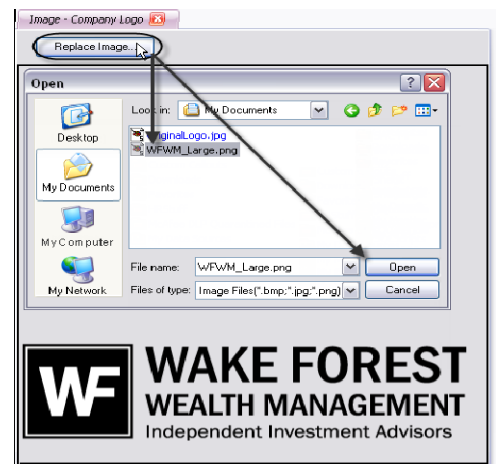
- 1 From the element library, double click to open the image element you want to replace. In this example, we are replacing the Company Logo image.
- 2 On the Image tab, you should see either the original image you are replacing or the test image if you have installed for the first time. Click the Replace Image button.



- 3 The Open dialog appears. Browse to the location of the new image file. You can import one of three image types:

- ◆ JPG
- ◆ PNG
- ◆ BMP

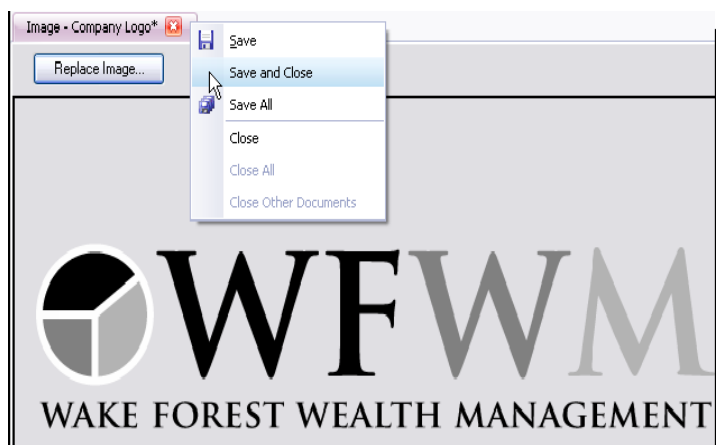
Click the Open button.



- 4 The new image should appear in the body of the tab, similar to the example to the right.

Save the new image. There are two ways to save the image:

- ◆ Click the Save button in the tool bar, and then click the x button on the right of the tab to close the tab.
- ◆ Right-click the Image tab name and select Save or Save and close from the menu, as shown to the right.



Working with Presentation Elements

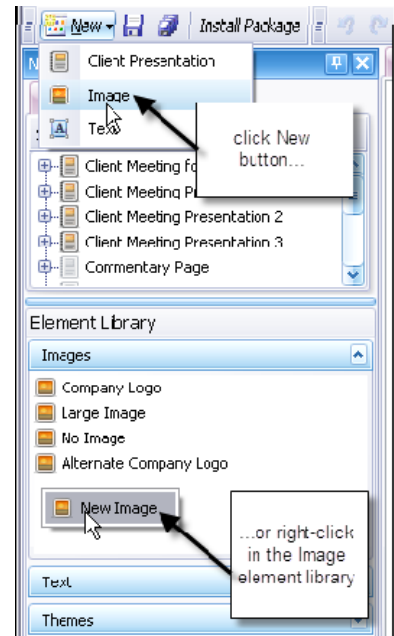
Adding a New Image Element

You can create as many image elements as you need. Follow the instructions below to create a new image element. These instructions assume you already have Presentation Studio open.

- 1 On the Navigator pane, click the Images bar under the Element Library section.
- 2 Create a New Image Element.

You can create a new image element one of two ways:

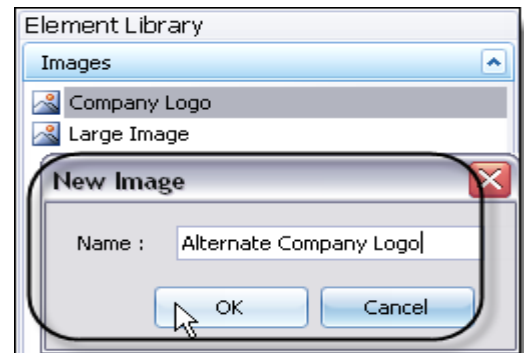
- ◆ From the menu bar, click the **New** button and then select the Image menu option.
- ◆ Right-click inside the Images area under the Element Library and select **New** from the right-click menu.



- 3 The New Image dialog opens. Enter the name of the new image, similar to the example on the right, and then click **OK**.

The name of the new image will now appear in the Element Library under the Images section.

- 4 In the preview section of Presentation Studio, you will now see a new Image tab with the name of the new image you entered into the New Image dialog box.



Working with Presentation Elements

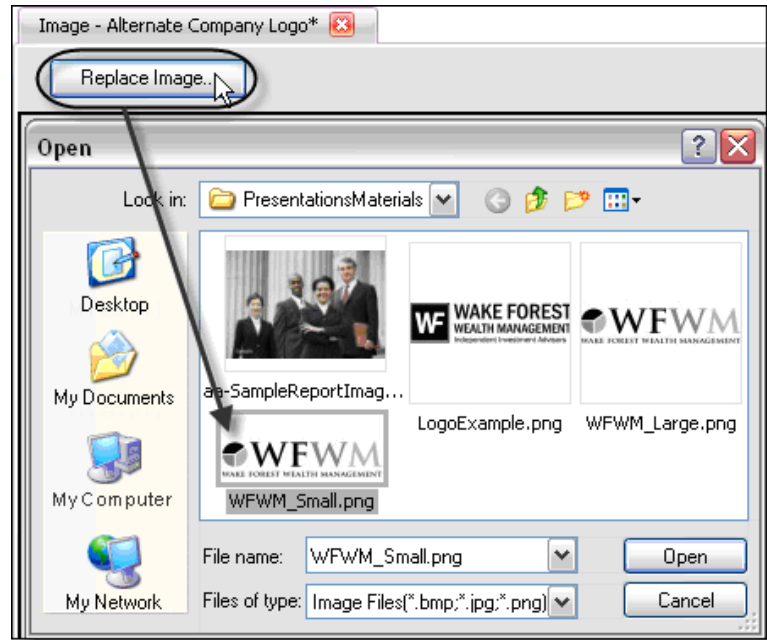
- 5 On the Image tab, you should see a blank gray screen in the preview area, indicating that no image has been selected for this element.

Click the Replace Image button to add a new image.

- 6 The Open dialog appears. Browse to the location of the new image file. You can import one of three image types:

- ◆ JPG
- ◆ PNG
- ◆ BMP

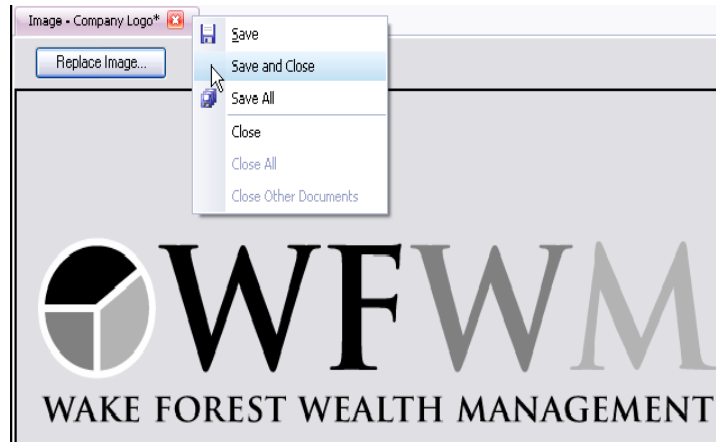
Click the Open button.



- 7 The new image should appear in the body of the tab, similar to the example to the right.

Save the new image. There are two ways to save the image:

- ◆ Click the Save button in the tool bar, and then click the x button on the right of the tab to close the tab.
- ◆ Right-click the Image tab name and select Save or Save and close from the menu, as shown to the right.



Building Presentations

Now that you know how to navigate and move around in Presentation Studio and understand the parts of a presentation, you are ready to put it all together in a presentation. To save time with building presentations, it is best to plan your total presentation strategy. Are you going to incorporate other items into the presentation, or use only the pages available in Presentation Studio? Are you collating with reports and resources from other applications? Review the Best Practices section below for tips that can help save you time and streamline the process.

Best Practices and Tips for Building Presentations

Flexible reporting options and customization is an important part of building your brand, but you have other things to focus on than building reports. For that reason we have provided you with several presentations you can use as starting points that can save some time. Follow these tips to build your presentations quickly:

- ◆ Consider modifying an existing presentation – we have created several presentations to get you started. Review the Currently Available Presentations section starting on page 42 for a list of the existing presentations and pages available to help you decide which one matches your ideal presentation.
- ◆ Select a Theme – Be sure to consider whether you are printing the presentation to paper or to a file. Once you have decided how you plan to present the files to your clients, review all the theme options in the Working with Theme Elements section starting on page 22 for a list of Theme elements available. If none of the provided themes gives you the color schemes you need, try copying one that is close and modifying it. See the Editing an Existing Theme Color Palette section starting on page 29 for more information about modifying the themes.
- ◆ If you plan to use them, add text elements, format them, and then assign them to the appropriate pages in Presentation Studio. For more information about working with Text Elements, see the Working with Text Elements section starting on page 31.
- ◆ If you plan to use them, add image elements and assign .JPG, .BMP or .PNG files to them in Presentation Studio. Assign the image elements to the correct pages. For more information about working with Image Elements, see the Working with Image Elements section starting on page 37.
- ◆ If you want to change the information provided or the order it is provided, add, remove, and rearrange pages as necessary. See the Modifying an Existing Presentation section starting on page 43 for more information and details about moving and arranging pages.
- ◆ Finally, print or save a test copy of the presentations to ensure it appears as you wanted it. If you are printing to paper, print a test copy to ensure that what you see on paper appears as you saw it on the screen and if you are saving it as a file for upload, save a sample/test copy first and try the upload to ensure it appears as it should. For more information about printing or saving the presentations, see the Printing Presentations section starting on page 50.

Building Presentations

Currently Available Presentations

Before getting started with modifying presentations, it is best to review what is available so you select the presentation that works best for your clients. Review the table below for a summary of the presentations that are included in this version of PortfolioCenter.



Notes

- ♦ The table below lists only the pages included in the default presentations. For a list of all default pages provided, see the Pages Available in this Version section starting on page 15. However, for the most up to date resources about available pages and presentations, see our presentations gallery at <https://tamaracpc.com/public/spt/client-news-and-resources/portfolio-center-report-presentations/gallery-portfolio-center-report-presentations>
- ♦ Remember, some presentations might be inactive and you might not see them right away. Remember to change the Show setting to **All** in the Navigator pane to see both active and inactive presentations. See the Working with the Active/Inactive Presentations Feature section starting on page 12 for more information about using this feature.

Presentation Name	List of Default Pages	Page Orientation
Client Meeting	Cover Page with Image, Cover Letter, Portfolio Overview, Holdings Page	Landscape
Client Meeting 2	Cover Page Plain, Portfolio Value vs. Cumulative Net Investment (graph), Performance Two Pane Landscape, Allocation by Category Landscape, Holdings Page by Account	Landscape
Client Meeting 3	Cover Page Plain, Cover Letter, Overview Three Pane Portrait 2, Holdings Page	Portrait
Commentary Page	Cover Letter	Landscape
Cover Page and Overview	Cover Page Plain, Portfolio Overview	Landscape
Extended Client Meeting	Cover Page Plain, Cover Letter, Portfolio Overview, Holdings Page by Account, Position Performance Summary, Report Disclaimers	Landscape
Overview Landscape	Portfolio Overview	Landscape
Overview Portrait	Portfolio Overview Portrait	Portrait
Quarterly Report	Mailing Page, Cover Letter, Portfolio Overview Portrait, Holdings Page	Portrait
Quarterly Report 2	Mailing Page, Cover Page Landscape Image, Overview Three Pane Landscape, Position Performance Summary, Report Disclaimer	Landscape

Building Presentations

Modifying an Existing Presentation

We have created several presentations for you to get you started. If you find that you want or need to customize the presentations to make them work for you, use these tips and steps below to get started.



Note

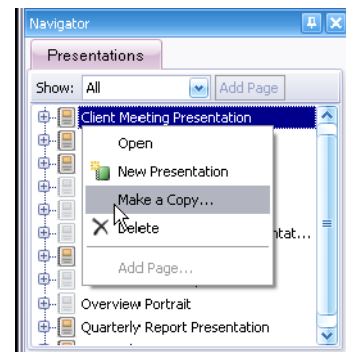
It is a good idea to run the presentation after each change to ensure you are making the correct changes and are staying on track. There are two methods for running presentations for an account. See the Running Presentations to See the Changes section starting on page 48 for information about each method.

Copying an Existing Presentation

We have provided you with several presentations to get you started. However, there is no undo option, nor is there a way to return things back to the default. For that reason, we highly recommend that you copy the presentation you want to modify and make your changes in the copy. If you make a mistake, it is easy to delete the presentation and start over. The steps below assume you already have Presentation Studio open.

- 1 Decide on the presentation you want to copy. The best way to make this decision is to expand or open the presentations available or review the Currently Available Presentations section starting on on page 42.
- 2 From the list of presentations in the Navigator Pane, right-click on the presentation you want to copy.

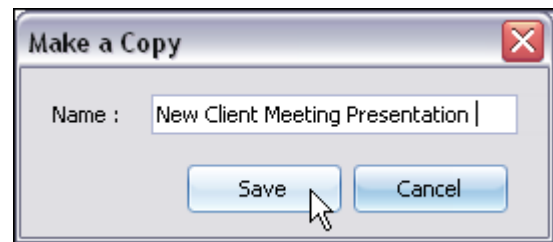
From the menu that appears, select Make a Copy... from the menu, similar to the example on the right.



- 3 The Make a Copy dialog opens, including the name of the presentation you are copying, with the text “copy” appended.

Enter a new, unique name, and then click Save.

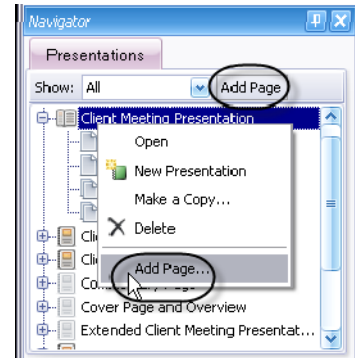
- 4 To make edits or modify the copied presentation, double-click or expand it from the Navigator pane to open it in Presentation Studio.



Building Presentations

Adding Pages to an Existing Presentation

- 1 Open the presentation you want to modify. You can either click the plus icon to expand it or double-click the name of the presentation in the Navigator pane.
- 2 There are two ways to add a page:
 - ◆ Right-click on the presentation name and select Add Page... from the menu
 - ◆ Select the name of the presentation and then click the Add Page menu option

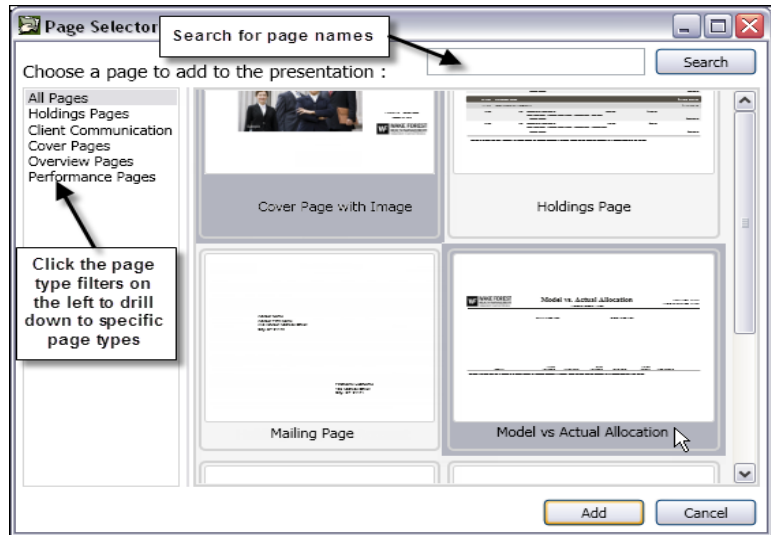


Note

The Add Page button is disabled if the presentation is closed. To add pages, you must open the presentation.

- 3 The Page Selector window opens. Find the pages you want to add to the presentation. There are a few ways to locate the page you want to add:

- ◆ Scroll through the available pages by clicking the scroll bar or using the scroll wheel of your mouse.
- ◆ Click the page type filters on the left to limit the page options to just a certain type.
- ◆ Enter the name of the page in the search box to search for a page name.



- 4 Once you find the page or pages you want to add, select them in the Page Selector window. You can select more than one page at a time by using the shift and control keys:
 - ◆ Press the CTRL key if you are adding non-consecutive pages. In the example above, if we were adding only the Cover Page with Image and Model vs. Actual Allocation pages, we'd press the CTRL key, select Cover Page with Image and, while keeping the CTRL key pressed, then select Model vs. Actual Allocation. Both will appear with a gray box around them to indicate they are both selected.
 - ◆ Press the SHIFT key if you are adding consecutive pages. In the example above, if we were adding all four pages, we'd select the Cover Page with Image page first, press the SHIFT key, and then select Model vs. Actual Allocation page. All four pages will appear with a gray box around each of them, indicating all four are selected.

Once you have all pages selected, click the **Add** button.

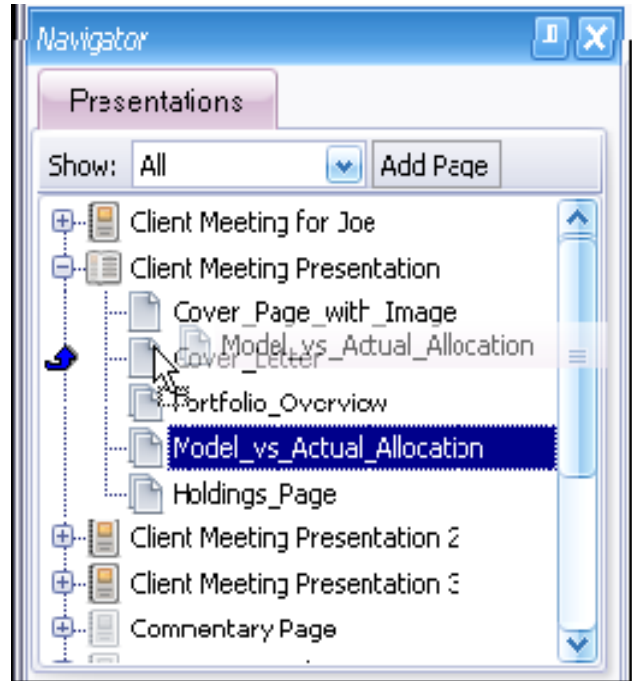
Building Presentations

Moving Pages within an Existing Presentation

Moving pages is as easy as dragging pages and dropping them in the correct location. From the list of pages, select the page you want to move and drag it to the location you want to place it. As you move the page, you will see the blue arrow indicating the location of the page. You will also see the name of the page you are moving with a lighter, ghosted appearance.

In the example to the right, we are moving the Allocation by Category Landscape page between the Portfolio Value vs. Cumulative Net Investment and Performance Two Pane Landscape pages.

Once you have located where you want to place the page, drop it into that location. Repeat moving pages until you have them in the order you want to keep, and then save the presentation changes.

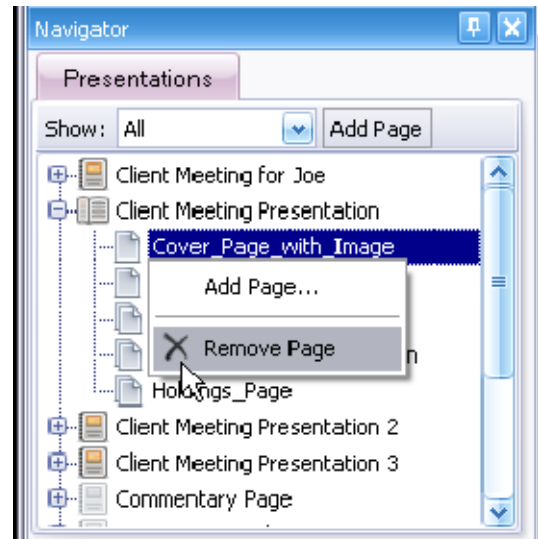


Removing pages from an Existing presentation

Removing pages is also very easy. From the list of pages, right-click the page you want to remove and select Remove Page from the menu, similar to the example on the right.

In the example to the right, we are removing the Allocation by Category Landscape page.

Repeat removing pages until you have only the pages you want to keep, and then save the presentation changes.



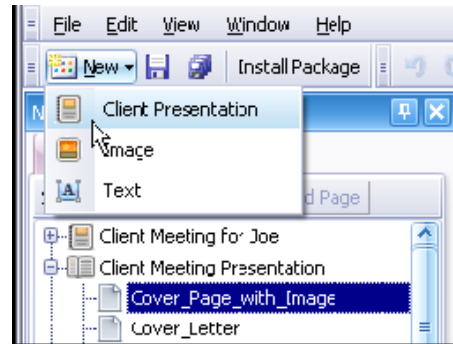
Building Presentations

Creating a New Presentation

If you would rather build a new presentation from the ground up, follow the tips and instructions from the sections below to create a new presentation. All instructions in each section assume Presentation Studio is already open.

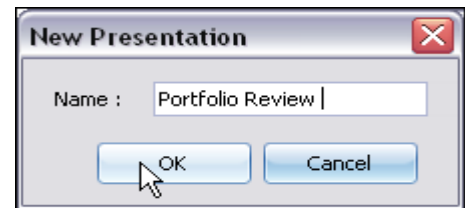
Adding and Naming the Presentation

- 1 From the Navigator pane, click the New button.
- 2 From the menu that appears, select Client Presentation from the list.



- 3 The New Presentation dialog opens. Enter a presentation name, and then click OK.
- 4 The presentation should open in the Preview Pane.

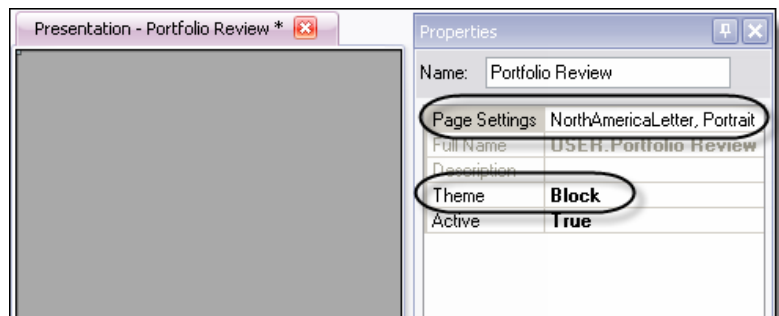
Make sure that the presentation name is on the Pink open tab in the preview pane, similar to the example below.



- 5 Set the Page Orientation and Theme.

In the Properties Section of the open presentation, ensure the Page Setting option is set to the appropriate page orientation.

In the Theme setting, select the theme most appropriate for this presentation.



Notes

- ♦ Unless otherwise noted, most of the presentation pages are designed for Landscape page orientation. Be sure to consider the pages you want to add before you decide on this setting. For a list of current pages and the designed page orientation for each, see the Pages Available in this Version section starting on page 15.
- ♦ For a review of the themes, see the Current Theme Options section, starting on page 23.

- 6 Save the presentation. You can either right-click the tab and select Save or Save All, or click the Save or Save All buttons on the button menu.

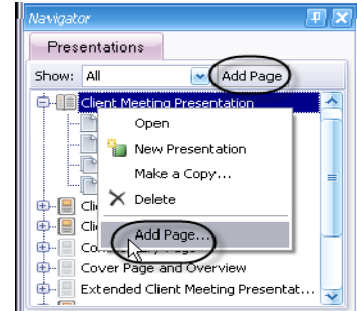
Building Presentations

Adding Pages

After creating the presentation shell, you need to add pages. The steps below assume you have created the presentation and have it open in Presentation Studio.

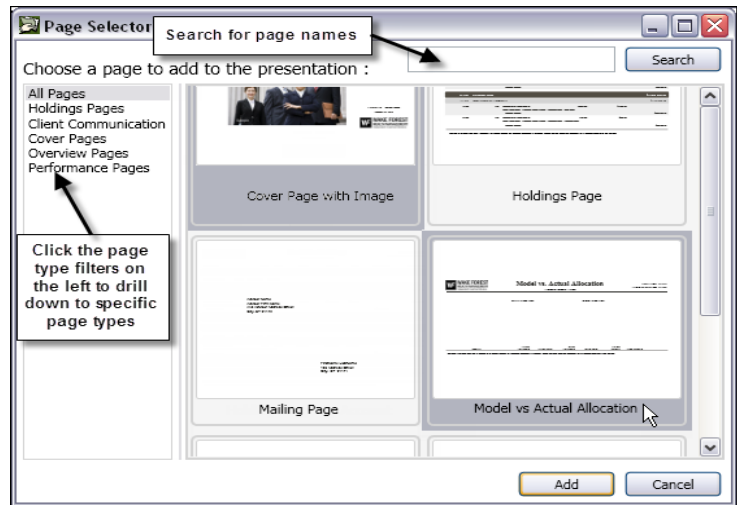
1 There are two ways to add a page:

- ◆ Right-click on the presentation name and select Add Page... from the menu
- ◆ Select the name of the presentation and then click the Add Page menu option



2 The Page Selector window opens. Find the page you want to add to the presentation. There are a few ways to locate the page you want to add:

- ◆ Scroll through the available pages by clicking the scroll bar or using the scroll wheel of your mouse.
- ◆ Click the page type filters on the left to limit the page options to just a certain type.
- ◆ Enter the name of the page in the search box to search for a page name.



3 Once you find the page or pages you want to add, select them in the Page Selector window. You can select more than one page at a time by using the shift and control keys:

- ◆ Press the CTRL key if you are adding non-consecutive pages. In the example above, if we were adding only the Cover Page with Image and Model vs. Actual Allocation pages, we'd press the CTRL key, select Cover Page with Image and, while keeping the CTRL key pressed, then select Model vs. Actual Allocation. Both will appear with a gray box around them to indicate they are both selected.
- ◆ Press the SHIFT key if you are adding consecutive pages. In the example above, if we were adding all four pages, we'd select the Cover Page with Image page first, press the SHIFT key, and then select Model vs. Actual Allocation page. All four pages will appear with a gray box around each of them, indicating all four are selected.

Once you have all pages selected, click the **Add** button.

- 4 Arrange the pages into the order you need. For more information about moving pages within an existing presentation, see the Moving Pages within an Existing Presentation section on page 45 for instructions.
- 5 Save the presentation. You can either right-click on the presentation tab and select Save or click the Save or Save All buttons.

Building Presentations

Running Presentations to See the Changes

The preview pane of Presentation Studio is a great way to see generalizations of how the page might look, but sometimes actual portfolio and account data can have a different impact. Also, graphs, such as the Portfolio Allocation and Portfolio Value vs. Cumulative Net Investment do not show you actual values in the preview pane so it is harder to tell what it will look like.

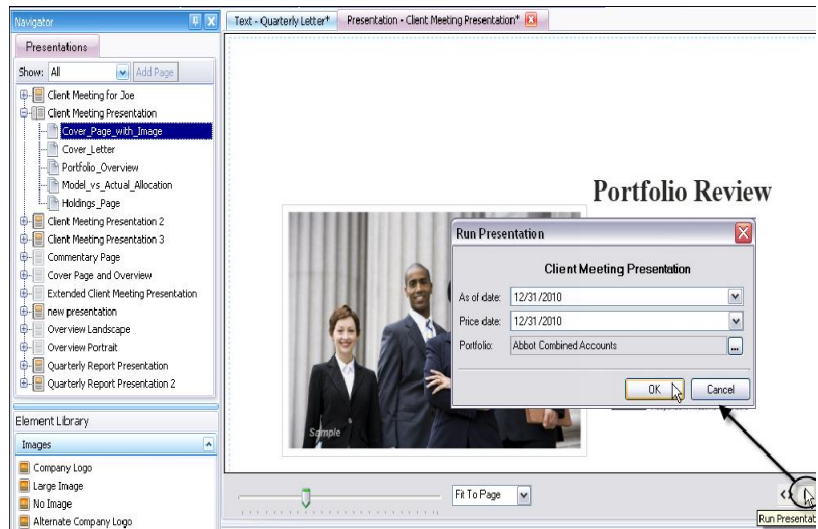
For that reason, it is always a good idea to run the presentation from time to time while you're editing it to see what pages look like with actual data. It is a best practice to select a couple of sample accounts, one of them a group, which are good representatives of the accounts you plan to include in the batch print process for the presentations.

There are two ways to run a presentation on an account to see the presentations: from inside Presentation Studio and from the Reports List.

Building Presentations

Running the Presentation from Inside Presentation Studio

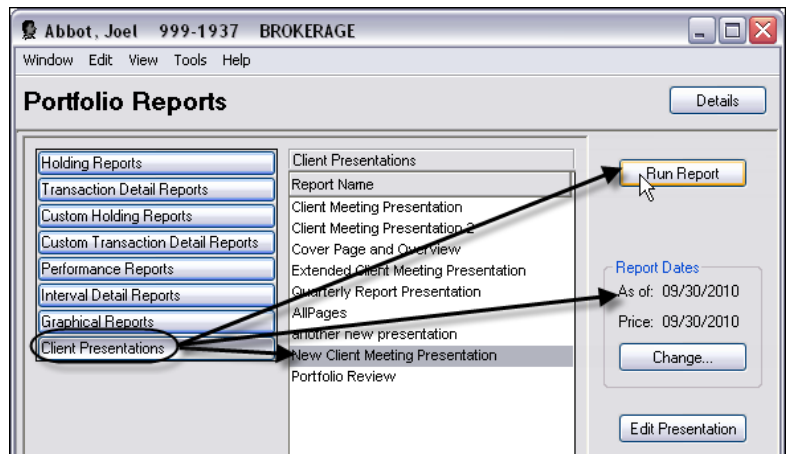
- 1 After making all your changes, save the presentation. You can either right-click the tab and select Save from the menu or click the Save button in the menu bar.
- 2 Click the Run Presentation button, located in the lower right side of the Preview Pane, as shown below.
- 3 The Run Presentation dialog opens, similar to the example to the right. Select the As Of and Price Dates, and then click the browse box to the right of the Portfolio setting to select the Account (portfolio or group).



- 4 Click OK to run the presentation. The presentation opens in a separate window.

Running the Presentation from the Reports Menu in Portfolio or Group Details

- 1 From the list of portfolios and groups, select the portfolio you want use to test the presentation.
- 2 Right-click on the portfolio or group and select Reports to open the Portfolio Reports window.
- 3 Click the Client Presentations button, located at the bottom of the window.
- 4 Set the Report As Of and Price dates, located to the right of the report list.
- 5 Select the presentation you want to test, and then click the Run Report button, as shown in the example above. The presentation opens in a separate window.



Printing Presentations

Once you have all the customizations set, you are ready to start using your new presentations. This section will show you how to print the presentations. There are two ways to print presentations: one-by-one from the Presentation Viewer preview of the presentation and by using Batch Processing.

Printing from the Presentation Viewer Preview



Note

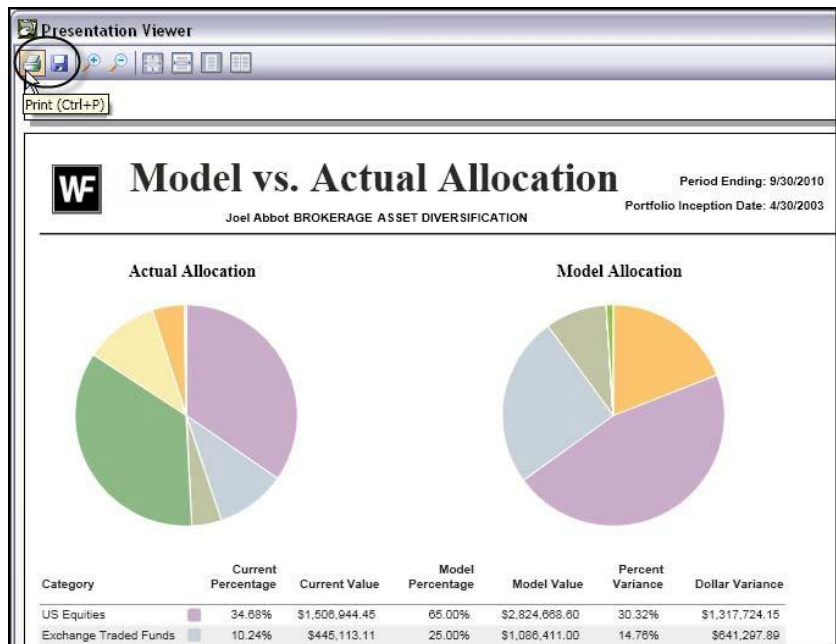
This section assumes you have already run the Presentation. For more information and steps to run the presentation, see the Running Presentations to See the Changes section starting on page 48.

Whether you are printing to paper or to a file, you can print from the preview of the presentation.

Each time you run the presentation it opens in a separate window called Presentation Viewer, similar to the example on the right.


At the top left of the Presentation Viewer, you will see two buttons:

- ◆ Print (🖨️) – use this button to send the presentation to a printer to be printed on paper.
- ◆ Save (💾) – use this button to save the presentation as either a PDF or XPS file that you can either upload to a website or email to your client.



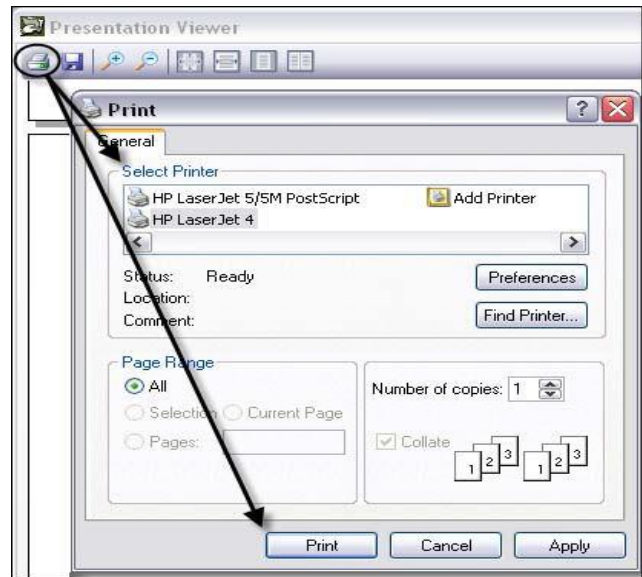
Printing Presentations

Printing to Paper


From the Presentation Viewer, click the Print  button to send the presentation to a printer.

When you click the Print button, the Print dialog, similar to the one you might see in other applications or when printing web pages, opens.

Select the printer you want to use, if applicable, and any other settings or preferences, and then click the Print button.



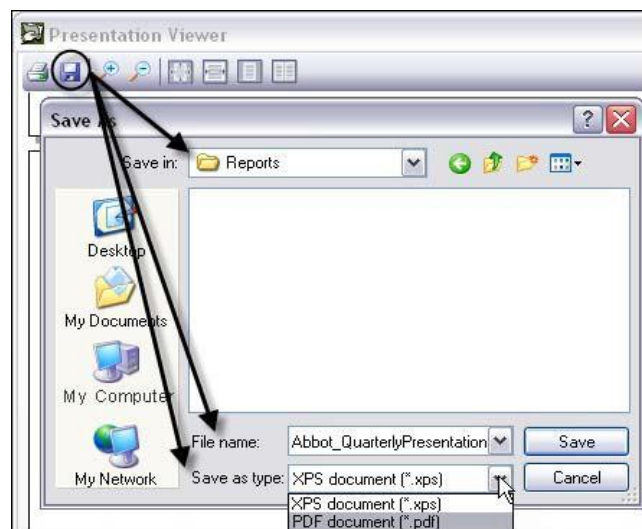
Saving to a File

From the Presentation Viewer, click the Save  button to save the presentation to your hard drive or a disk on the network.

When you click the Save button, the Save As dialog opens, similar to the example on the right.

In the Save In field, enter, select or browse to the location you want to save the file, and then in the File Name field enter the name you want to give to the file.

In the Save As type field, click the down arrow to select one of the two file types available:



- ◆ XPS – the Microsoft Portable File system, similar to PDF, which can be shared by uploading or emailing the data to your client. Most Microsoft machines should have an XPS viewer installed, but there may be cases where the recipient might need to install a reader application.
- ◆ PDF – the more common portable file system that can be opened on any computer that has Adobe Reader or similar PDF reader installed. You can upload or email the file, as you can with XPS file types.

Click Save to save the file in the selected location with the name and file type.

Printing Presentations

Batch Printing Presentations

Just like you can for PortfolioCenter Reports, you can batch print presentations for several portfolios and/or groups at once. While the principle is the same, the details are slightly different – and streamlined – from the PortfolioCenter batch print because you don't have to select each page or report separately. Instead of a complex wizard with several pages of settings, you have a single page with just a few settings that should be familiar to you. Also, the Batch Processes are separated from the PortfolioCenter batch print jobs to make it easier to segment the production of the reports.



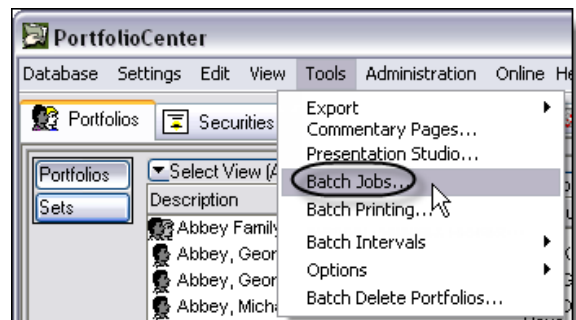
Note

You cannot include PortfolioCenter Reports with a Batch Process, nor can you include a Client Presentation in a PortfolioCenter Batch Print job. If you intend to use them together, you will have to manually collate the pages.

To open the Batch Jobs dialog, go back to the PortfolioCenter main screen – the Portfolios list.

From the menu bar, go to Tools | Batch Jobs...

The Batch Jobs dialog box, similar to the example below, opens in a new window. The Batch Jobs dialog box displays all the created Batch Jobs as a list on the left. Similar to the way Presentation Studio operates, though, you have to open the batch job to print or create the presentation files.

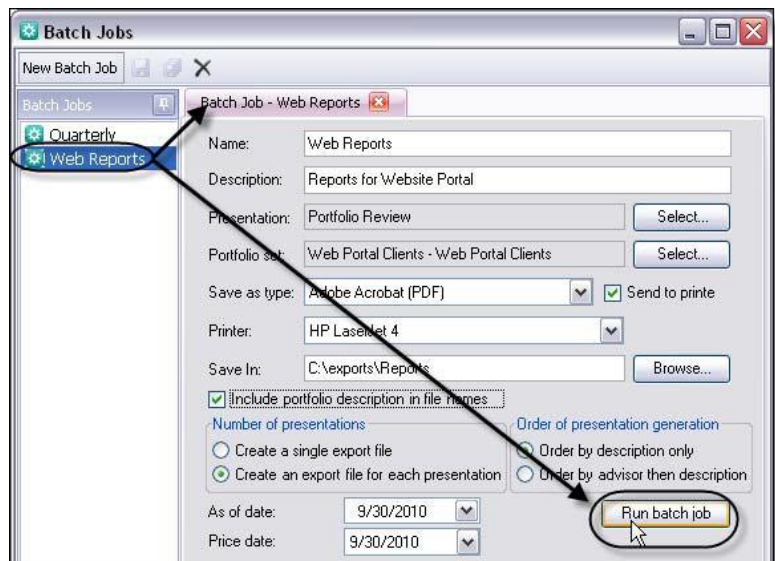


To create a new batch job, click the New Batch Job button, located on the upper left corner of the window.

To open an existing batch job, double click it. As in Presentation Studio, the open batch job is indicated by a pink tab with the name of the batch job.

As you make settings changes, you will need to save those changes, just as you did in Presentation Studio.

Once you have decided on your settings and saved them, click the Run Batch Job button to start printing or creating the files.



Working with Presentation Packages

Presentation Packages are files that contain all the pre-formatted presentations, pages and themes available. Packages give us the flexibility to provide you with more up-to-date presentations, pages and themes between versions of PortfolioCenter.

The Presentation Packages need to be installed to be added to the database. Starting with version 5.1, the installation of the packages becomes automated when the installation package is in the default presentation packages directory. This chapter describes how to download a package, when the files are automatically installed, and how to manually install it if necessary.

Downloading Presentation packages

On the Presentations Gallery portion of our website (<https://tamaracpc.com/public/spt/client-news-and-resources/portfoliocenter-report-presentations/gallery-portfoliocenter-report-presentations>) you can find a wealth of detailed information about the contents of all presentation packages, including specifications for each presentation, page and theme available.

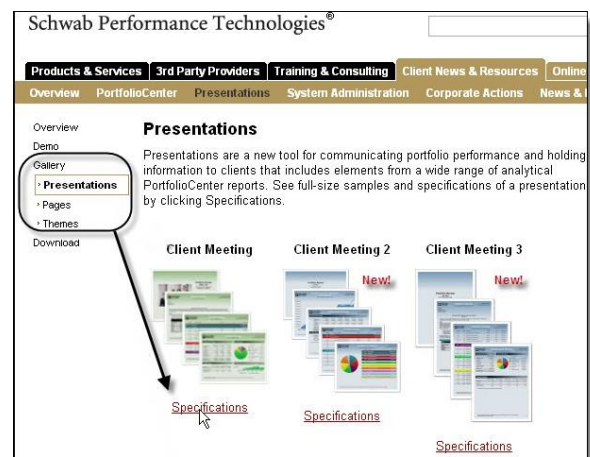
On this section, you can find detailed information about the data points provided and settings available, as well as find examples of each presentation, page or theme available.

We encourage you to review any new presentations, pages or themes before downloading the package to ensure you are aware of the new settings and features available for those pages or themes.

When you are ready to download the package, click the Download menu option on the left navigation bar.

As with PortfolioCenter upgrades, you are prompted to enter your Maintenance ID and Company name. You will then get a link to save the file, followed by additional instructions for saving the file.

Click the link to save the file in the dialog box, similar to the example on the right.



Working with Presentation Packages

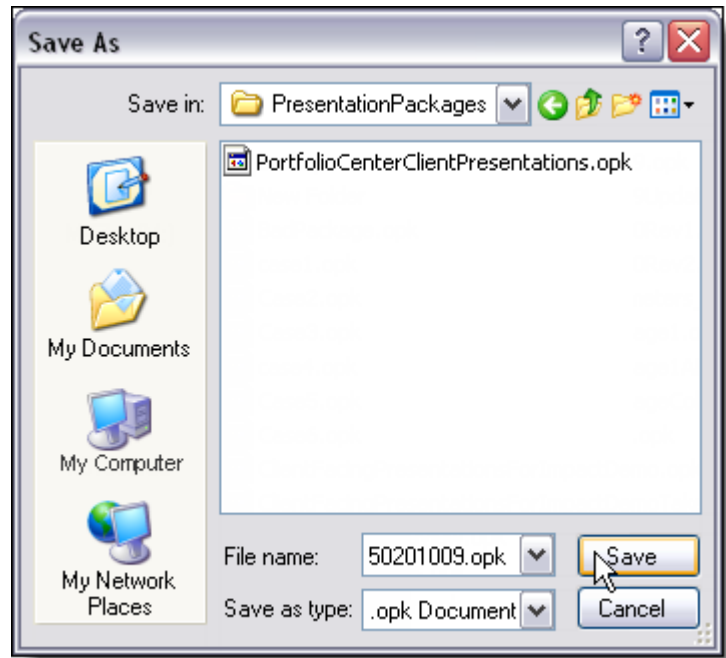
The Save As window opens.

You can save the file anywhere, but to take advantage of the automatic installation feature, the best practice is to save the file in the following location:

C:\Program Files\Schwab Performance Technologies\PortfolioCenter\Presentation Packages

This path should exist on all computers in the network and the installation populates the database, so it only needs to be done once.

Browse to the default location and save the file using the default file name. The file extension should always be .OPK, similar to the example on the right.



Installing Presentation Packages

All packages must be installed before you can gain access to the presentations, pages, themes, image and text elements.

Automatic Installation of Presentation Packages

As long as the package is in the default location, Presentation Studio will attempt to install the package when one of the three following scenarios takes place:

- ♦ First time you open Presentation Studio after downloading a package, installing PortfolioCenter 5.1 or higher, or upgrading to PortfolioCenter 5.1 or higher.
- ♦ Launching Batch Jobs for the first time after downloading a package, installing PortfolioCenter 5.1 or higher, or upgrading to PortfolioCenter 5.1 or higher
- ♦ Clicking the Client Presentations button in the Reports window of Portfolio or Group details for the first time after downloading a package, installing PortfolioCenter 5.1 or higher or upgrading to PortfolioCenter 5.1 or higher.

The automatic installation should not be apparent – it might seem like it takes a little longer to open than usual the first time, but otherwise, unnoticeable. To verify that the installation worked correctly, you should review the pages, themes and presentations included in the package specifications.

Working with Presentation Packages

Manually Installing a Presentation Package

However, if, after opening Presentation Studio you do not see the new pages or themes you expected or if you saved the .OPK file to a different location than the default directory listed above, you must manually install the package.

To manually install the package, open Presentation Studio and click the Install Package button. The Open dialog displays, similar to the example to the right. Browse to the location of the .OPK file you downloaded, select it, and then click Open.

The installation should be very quick and almost unnoticeable, similar to the automatic installation.

