



PORTFOLIO MANAGER CUSTOM REPORTS QUICK REFERENCE GUIDE

This guide will show you how to get started with the Portfolio Manager Custom Reports tool, including basic instructions for generating a custom report, displaying report data, and controlling the data displayed in your report.

You may contact technical support at any time by clicking the [Contact Us](#) link located at the top of every Portfolio Manager page. The technical support team will respond to all questions within one business day.

ABOUT PORTFOLIO MANAGER REPORTS

Portfolio Manager Reports is an interactive tool that allows you to easily extract and display data, share system reports and templates, and graph information about your facilities and their performance. This tool will help you prioritize activities and measurements, establish more robust benchmarks, report to other groups, share custom reports, and conduct comparative analysis.

Data available for reporting:

- Data for facilities that you created
- Data for facilities that other users have shared with you

Note: Data used in Portfolio Manager Reports is updated nightly—therefore, it will not reflect any changes you make to your account until the next day.

Data requirements:

- At least one complete month of data is required for a facility to show up in a report.
- One complete year of data is required for some metrics that calculate based on annual measures.

KEY FEATURES

Report Templates

Portfolio Manager Report Templates provide you with a set of related data around specific aspects of your Portfolio (e.g., Energy Performance, Emissions Performance). You can also choose to create a custom report template, which allows you to select data that is specific to your buildings and purposes. Plus, once a custom report template is created, you can share the template with other users as a means of gathering information and data.

Create and Generate Reports

Portfolio Manager Report Templates have up to four filters, which are designed to help you select the right group of facilities for your report. The following filters are available:

- **Reporting Period** – You can generate reports for different reporting periods, including “single period” (one 12-month period), “comparative” (two 12-month periods), or “range” (all periods within date range). If no reporting period is selected, the default is set to “single period.”
- **Facilities and Groups** – You can generate reports for specific facilities or groups of facilities in your account.
- **Location** – You can generate reports based on where your facilities are located. This filtering can be done at the country, state, or city/zip code levels.
- **Facility Type** – You can generate reports for specific types of facilities in your account (e.g., offices, hotels).

The choices that are displayed for each filter are based on the facilities that are currently contained in your account (e.g., you will only be able to choose among those U.S. states in which you have facilities).

Share Report Template

Portfolio Manager allows you to share a copy of your Custom Report Template to other individuals who use Portfolio Manager. These copies are independent of your personal copy of the Custom Report Template, therefore changes can be made without affecting your copy.

Portfolio Manager Quick Reference Guide

Laura A. Zubulake



Portfolio Manager Quick Reference Guide:

MS-DOS: a Quick Program Reference Guide J. Schieb, 1988 **PMP (PMBOK4) Quick Reference** Claudia Baca, 2012-04-30 PMP Quick Reference Digital Short Cut Claudia M Baca Douglas J Gilas ISBN 10 0 7897 4487 2 ISBN 13 978 0 7897 4487 6 As a final exam preparation tool the PMP Quick Reference provides a concise review of all objectives on the PMP Exam This digital Short Cut provides you with detailed graphic based information highlighting only the key topics in cram style format With this document as your guide you will learn how to prepare for the exam get useful tips for completing and filing your paperwork and discover useful things you should do on test day This fact filled Quick Reference allows you to get important information at a glance helping you to focus your study on areas of weakness and to enhance memory retention of essential exam concepts *xREF: System x Reference* David Watts, Ilya Krutov, IBM Redbooks, 2015-05-18 Lenovo System x and BladeCenter servers and Lenovo Flex System™ compute nodes help to deliver a dynamic infrastructure that provides leadership quality and service that you can trust This document simply known as xREF is a quick reference guide to the specifications of the currently available models of each System x and BladeCenter server Each page can be used in a stand alone format and provides a dense and comprehensive summary of the features of that particular server model Links to the related Product Guide are also provided for more information An easy to remember link you can use to share this guide <http://lenovopress.com/xref> Also available is xREF for Products Withdrawn Prior to 2012 a document that contains xREF sheets of System x BladeCenter and xSeries servers and IntelliStation workstations that were withdrawn from marketing prior to 2012 Changes in the May 18 update Added the Flex System Carrier Grade Chassis See the Summary of changes in the document for a complete change history *Suze Orman's Financial Guidebook* Suze Orman, 2006-08-15 A One on One Financial Planning Session with Suze Orman With her New York Times bestseller *The 9 Steps to Financial Freedom* America's leading financial expert Suze Orman transformed the concept of money forever by teaching us to recognize the emotional aspects of our relationship with it Now this fully revised edition of *Suze Orman's Financial Guidebook* translates Suze's own brand of motivation and inspiration into a user friendly hands on workbook that will empower you to work through the nuts and bolts of personal finance with Suze as your trusted adviser Updated to keep you abreast of our quickly shifting economy you'll find insightful exercises quizzes and worksheets to help you understand how your parents' relationship with money affects yours and what money means to you Up to the minute information on tax codes IRA rules and regulations and long term care insurance Useful strategies for coping with the ever changing landscape of educational costs social security and the stock market An outline of key questions that every financial adviser should ask you upon your initial meeting An in depth analysis of all your monthly expenses providing a realistic picture of just how much money you have to work with and how you may not be respecting your money as much as you should Regardless of your age and income it is never too early or too late to take control of your money *Suze Orman's Financial Guidebook* is the perfect companion to *The 9 Steps to Financial Freedom*

the personal finance classic that changed the way millions of Americans viewed money Full of self tests thought provoking questions and Suze s easy to understand personal finance advice here is your empowering approach to achieving financial freedom forever with the best guide possible

LEED v4 AP O+M MOCK EXAM Gang Chen,2017-08-01 Pass the LEED AP O M Exam Get Your Building LEED Certified Fight Global Warming and Save Money The USGBC released LEED v4 in GreenBuild International Conference and Expo in November 2013 The GBCI started to include the new LEED v4 content for all LEED exams in June 2014 We have incorporated the new LEED v4 content in this book LEED Leadership in Energy and Environmental Design is one of the most important trends in development and is revolutionizing the construction industry It has gained tremendous momentum and has a profound impact on our environment From this book you will be able to

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- 3 Check your responses against the solutions
- 4 Understand the solutions for the difficult questions through the explanations
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[Investment Adviser's Legal and Compliance Guide](#) Terrance J. O'Malley,John H. Walsh,2013-01-01 Investment Adviser s Legal and Compliance Guide Second Edition is an invaluable guide written to assist attorneys and investment advisers in both drafting their compliance policies and procedures and reviewing them annually In addition the

book serves as a practical tool for experienced attorneys and compliance officers for fulfilling their changing responsibilities under new rules adopted under the Investment Advisers Act of 1940 as well as new staff interpretations and guidance For the Second Edition the original author Terrance J Oand Malley is joined by John H Walsh While both authors are seasoned practitioners and acknowledged experts in the area of investment adviser compliance matters Mr Walshand s years of experience including at the SEC are reflected in the enhanced practical discussion of relevant legal and compliance issues including increased numbers of compliance tips enforcement and regulatory alerts and compliance tools Investment Adviser s Legal and Compliance Guide Second Edition covers in detail such topics as Filings and amendments that an adviser must make to maintain its SEC registration Major rules and requirements dealing with marketing and attracting new clients Issues arising in connection with the management of private funds The SEC s examination process New clients and the management of client accounts The book also covers requirements relating to the adviser s obligation to its customers including preventing insider trading and other trading abuses as well as an adviser s recordkeeping which is a major factor in meeting the requirements of the Investment Advisers Act In addition Investment Adviser s Legal and Compliance Guide Second Edition provides registered investment advisers and their legal counsel with a comprehensive review of their compliance responsibilities that arise under the Investment Advisers Act

Energy Efficient Buildings Zhiqiang John Zhai,2022-10-04

Energy Efficient Buildings A complete and authoritative discussion of the fundamentals of designing and engineering energy efficient buildings In Energy Efficient Buildings Fundamentals of Building Science and Thermal Systems distinguished engineer and architect Dr John Zhai delivers a comprehensive exploration of the design and engineering fundamentals of energy efficient buildings The book introduces the fundamental knowledge calculations analyses and principles used by designers of energy efficient buildings and addresses all essential elements of the discipline An essential guide for students studying civil architectural mechanical and electrical engineering with a focus on energy building systems and building science the book provides practical in class materials examples and actual design practices as well as end of chapter questions with solutions and sample group projects Readers will find A thorough introduction to the cross disciplinary approach to the design of energy efficient buildings Comprehensive explorations of all critical elements of energy efficient building design including standards and codes psychometrics microclimate thermal comfort indoor air quality HVAC systems and more In depth discussions of the foundational knowledge calculations analysis and principles needed to design energy efficient buildings Practical in class examples and end of chapter questions with solutions for students and design guidance and sample group projects for use in course lectures and actual design practices Perfect for graduate and advanced undergraduate students studying building environmental systems building systems in construction and mechanical and electrical systems in construction Energy Efficient Buildings Fundamentals of Building Science and Thermal Systems will also earn a place in the libraries of practicing civil architectural and mechanical engineers

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The Project Manager's Guide to Health Information Technology Implementation Susan M. Houston, 2021-12-16

This book focuses on providing information on project management specific for software implementations within the healthcare industry It can be used as a guide for beginners as well as a reference for current project managers who might be new to software implementations Utilizing the Project Management Institute's PMI methodology process groups and knowledge areas are defined as they relate to implementing custom and commercial off the shelf COTS software The Software Development Life Cycle SDLC is a standard for developing custom software but can also be followed for implementing COTS applications as well How will the system be set up from an architecture and hardware standpoint What environments will be needed and why How are changes managed throughout the project and after These questions and more will be reviewed The differences between types of testing are defined as well as when each are utilized Planning for the activation and measuring the success of the project and how well the strategic need has been met are key activities that are often not given the time and effort as the other parts of the implementation project This new edition updates the current content to better align with the newest version of the PMI's Project Management Body of Knowledge PMBOK as well as the latest technology and concepts In addition this new edition includes additional chapters on agile management stakeholder management and choosing the right methodology

The Handbook of European Structured Financial Products Frank J. Fabozzi, Moorad Choudhry, 2004-02-19 The first comprehensive account of the European structured financial products

market This comprehensive survey of the securitization market in Europe covers all asset backed securities the major classes and some nonconventional asset classes that have been securitized residential and commercial mortgage backed securities collateralized debt obligations and more Frank J Fabozzi PhD CFA CPA New Hope PA is the Frederick Frank Adjunct Professor of Finance in the School of Management at Yale University Prior to joining the Yale faculty he was a Visiting Professor of Finance in the Sloan School at MIT Moorad Choudhry Surrey UK is a Vice President in Structured Finance Services with JPMorgan Chase Bank **New Jersey Register** ,2013 PC Mag ,1984-08-07 PCMag com is a leading authority on technology delivering Labs based independent reviews of the latest products and services Our expert industry analysis and practical solutions help you make better buying decisions and get more from technology **5500 Preparer's Manual for 2018 Plan Years (IL)** Fisher, Andersen,2019-03-20 The premier resource in the field of Form 5500 preparation 5500 Preparer s Manual will help you handle the required annual Form 5500 filings for both pension benefits and welfare benefit plans Written by experts in the field of Form 5500 preparation the 2018 Plan Years edition provides Up to date line by line explanations making it easy to prepare forms for filings At a glance charts and examples covering key requirements filing summaries due dates penalties and more Easy to understand Practice Pointers and Items to Note throughout Prevent filing rejections with all EFAST2 edit checks conveniently noted at each applicable line item Step by step instructions for electronic filing including electronic signatures transmission and accessing government software Our popular most current NAIC Codes Listing for accurate Schedule A completion DOL and IRS Internet links throughout for easy reference The 2018 Plan Years edition has been completely updated to include guidance on Changes to the 2017 Form 5500 series as well other forms including Form SS 4 and Form W 12 Overview of proposed Form 5500 modernization changes for 2019 or later plan years as they apply to each schedule Proposed requirement for 2019 or later Form 5500 reporting for both large and small health plans to file a proposed Schedule J Group Health Plan Information in addition to completing certain Form 5500 elements Late filings the DOL s Delinquent Filer Voluntary Compliance DFVC Program and the latest IRS rules that must be satisfied in order to qualify for full relief under DFVC How to qualify for relief from the audit requirements that apply to small pension plans DOL Fiduciary Rule updates and implementation effective dates Administrative guidelines to address situations where plan participants are due their benefit but cannot be located The latest model language issued for summary annual reports and annual funding notice disclosures required of certain plans And much more Previous Edition 5500 Preparer s Manual for 2017 Plan Years ISBN 9781454898832 The Complete Guide to Organizing Your Records for Estate Planning John N. Peragine, Jr.,2009 Planning your estate is a long complicated process that requires much time and effort The process of organizing your records for estate planning is equally time consuming and complex Hiring an attorney to assist you may cost more than you are willing to spend With the help of The Complete Guide to Organizing Your Records for Estate Planning you can not only take charge of your estate planning documentation but also save time money and effort In this new book you will

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How to Make Money in ISAs and SIPPs

Stephen Sutherland, 2014-04-28 How to Make Money in ISAs and SIPPs by investment expert Stephen Sutherland is the first book of its kind to focus on how to secure a richer retirement using the UK's two top tax shelters ISAs Individual Savings Account and SIPPs Self Invested Personal Pension It's the ultimate guide for affluent DIY investors approaching retirement or in retirement looking to achieve better returns Inside you will learn how ISAs and SIPPs can boost your returns create a tax free income for life and reduce the risk of running out of money during retirement The book has a foreword by Richard Koch author of The 80/20 Principle with over a million copies sold in 34 languages Readers will discover How to create a tax free lifetime income stream A fast easy way to find funds in the money flow When to buy and exit at the optimum time How to protect your wealth when downtrends are triggered Insider secrets for saving thousands in fees and charges and much more How to Make Money in ISAs and SIPPs is aimed at ISA and SIPP investors or those thinking of investing who are unhappy

with their investment performance and want to boost their returns It s perfect for business owners self employed professionals corporate executives wealthy retirees and financial professionals It s also essential reading for investors who have at least 250 000 actively invested *Investment Manager Analysis* Frank J. Travers,2011-08-31 Praise for Investment Manager Analysis This is a book that should have been written years ago It provides a practical thorough and completely objective method to analyze and select an investment manager It takes the mystery and the consultants out of the equation Without question this book belongs on every Plan Sponsor s desk Dave Davenport Assistant Treasurer Lord Corporation author of *The Equity Manager Search* An insightful compendium of the issues that challenge those responsible for hiring and firing investment managers Frank Travers does a good job of taking complicated analytical tools and methodologies and explaining them in a simple yet practical manner Anyone responsible for conducting investment manager due diligence should have a copy on their bookshelf Leon G Cooperman Chairman and CEO Omega Advisors Inc *Investment Manager Analysis* provides a good overview of the important areas that purchasers of institutional investment management services need to consider It is a good instructional guide from which search policies and procedures can be developed as well as a handy reference guide David Spaulding President The Spaulding Group Inc This book is the definitive work on the investment manager selection process It is comprehensive in scope and well organized for both the layman and the professional It should be required reading for any organization or individual seeking talent to manage their assets Scott Johnston Chairman and Chief Investment Officer Sterling Johnston Capital Management LP *Investment Manager Analysis* is a much needed comprehensive review of the manager selection process While the industry is riddled with information about selecting individual stocks comparatively little has been written on the important subject of manager selection for fund sponsors This is a particularly useful guide for the less experienced practitioner and offers considerable value to the veteran decisionmaker as well Dennis J Trittin CFA Portfolio Manager Russell Investment Group *New Innovations and Best Practices Under the Workforce Investment Act* United States. Congress. House. Committee on Education and Labor. Subcommittee on Higher Education, Lifelong Learning, and Competitiveness,2009 *The Complete Guide to Convertible Securities Worldwide* Laura A. Zubulake,1991-09-03 Begins with an analysis of a typical U S dollar denominated Euroconvertible Goes on to discuss international convertible securities and such related topics as currency fluctuation and foreign currency exposure The characteristics of domestic markets in U S Britain Japan France Australia and Canada and their unique features and evaluation methods are examined Finally it looks at convertible hedging breakeven analysis risk profile and rate of return

PC Mag ,1984-07-24 PCMag com is a leading authority on technology delivering Labs based independent reviews of the latest products and services Our expert industry analysis and practical solutions help you make better buying decisions and get more from technology *Baker's Health Care Finance: Basic Tools for Nonfinancial Managers* Thomas K. Ross,2022-07-18 Baker s Health Care Finance Basic Tools for Nonfinancial Managers Sixth Edition is the most practical and

applied text for those who need a basic and better understanding of health care financial management Using actual examples from hospitals long term care facilities and home health agencies this user friendly text includes practical information for the nonfinancial manager charged with budgeting With new chapters on using Excel and Lean Six Sigma as well as all new cases that test students mastery of concepts and tools the new Sixth Edition is designed to give students an understanding of how healthcare organizations operate provide them with the skills to analyze financial performance prepare and manage operating budgets prepare capital budgets and improve financial performance New chapter on Using Excel ensures students have understanding this useful financial tool New chapter shows how Lean Six Sigma can be used to improve financial performance New Part VIII offers new case studies breakeven analysis ratios and operating indicators budgeting etc that give students the opportunity to apply concepts learned End of chapter problems reinforce concepts learned Navigate eBook Access included with the printed text provides convenient online or offline access to the digital text from a computer tablet or mobile device Healthcare Finance courses in Health Administration Nursing and other health disciplines 2023 496 pages

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