



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

Suze Orman



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*

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- 3 Check your responses against the solutions
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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

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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

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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

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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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