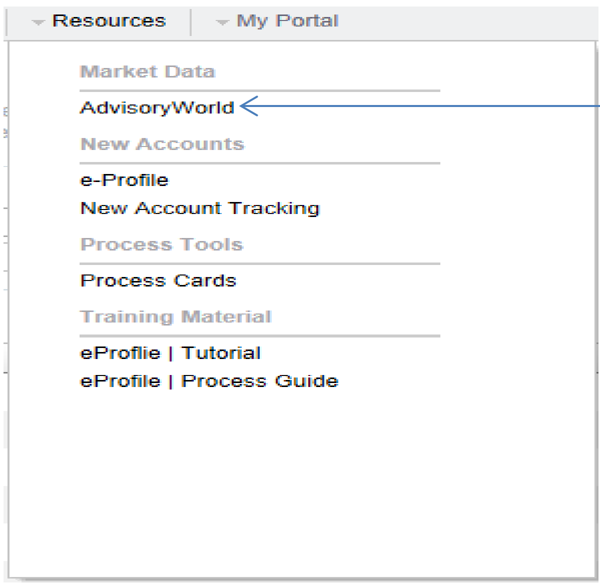
SCANalytics Training Series: Orion Reports

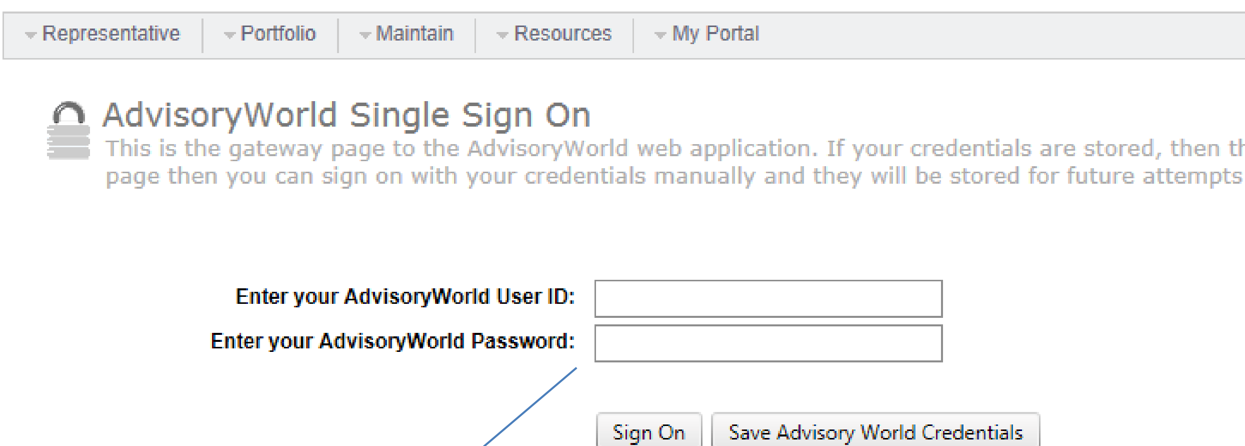
Table of Contents

Click here for a Complete User Manual

Hover over Resources which will show the dropdown menu.



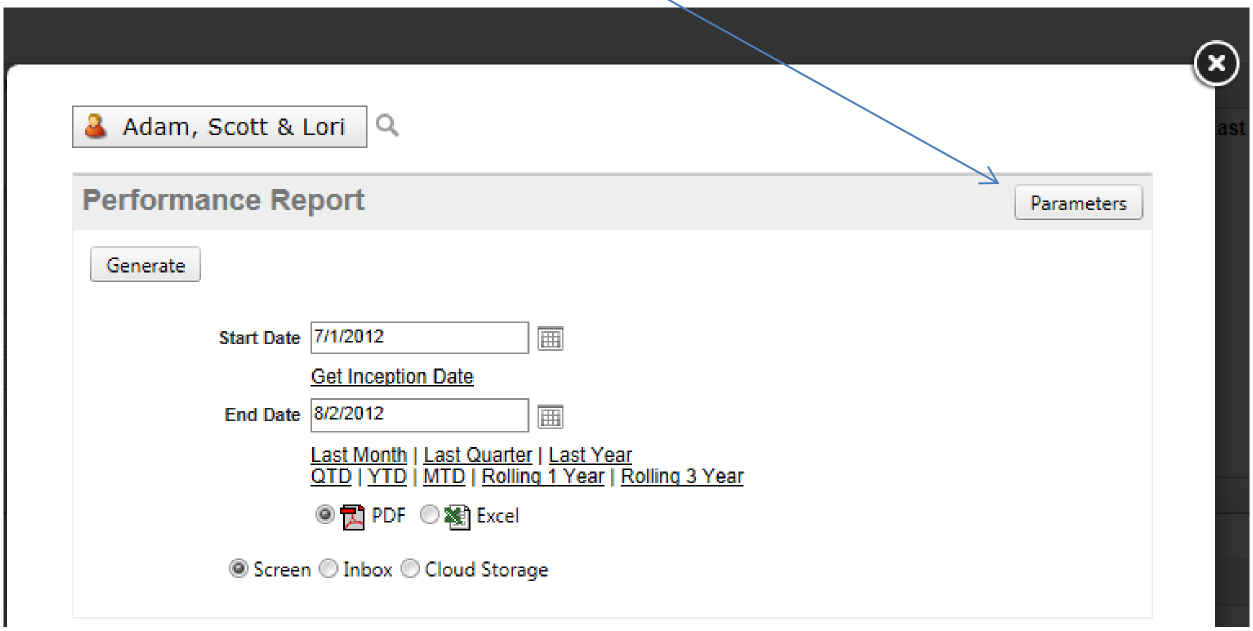
Click on the AdvisoryWorld link.

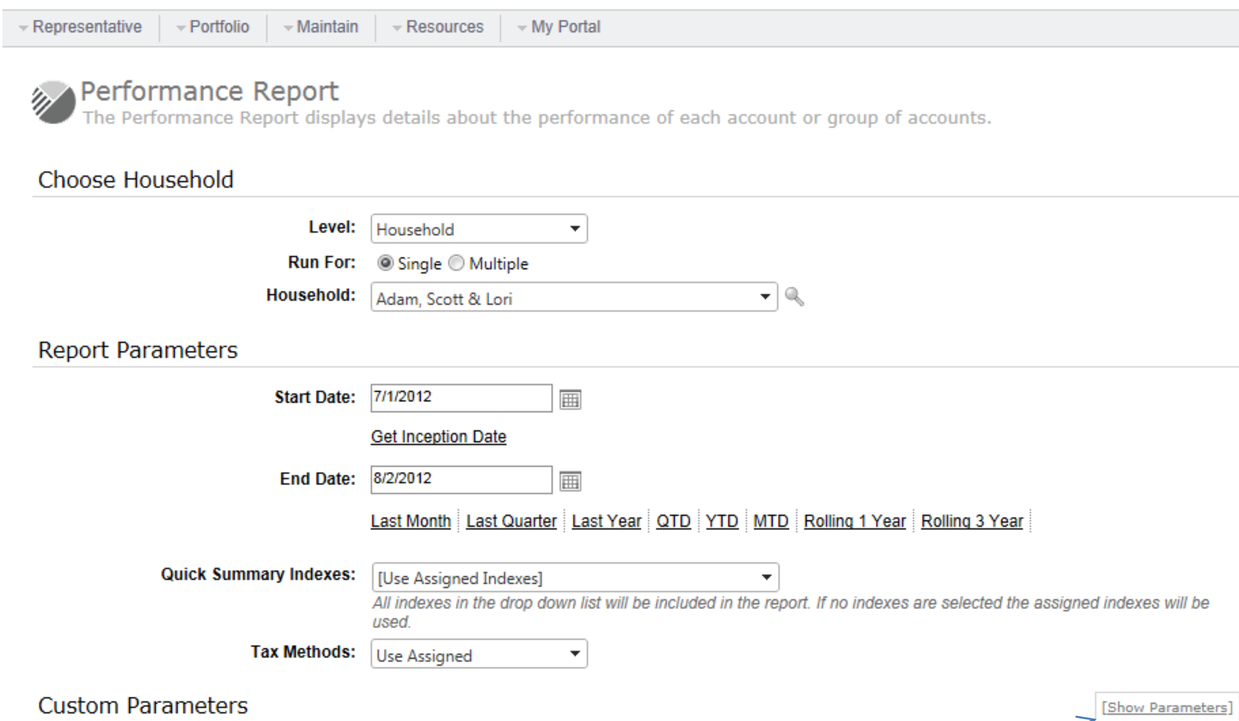


Enter the user ID and your Last Name here. This will only need to be entered once unless they would change.

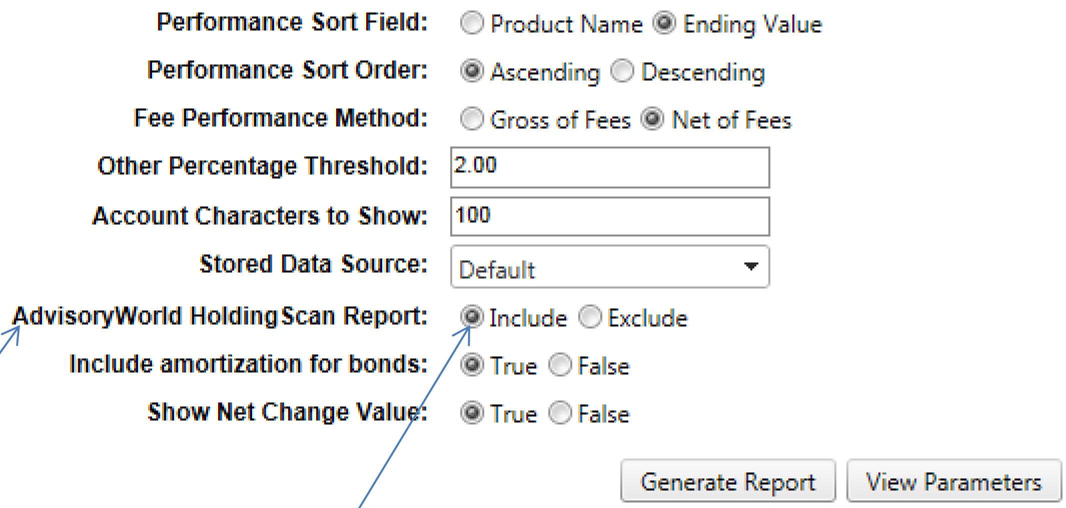
After the credentials have been entered click "Save AdvisoryWorld Credentials". This will store the credentials so that they will not need to be entered again unless they change.

Click on



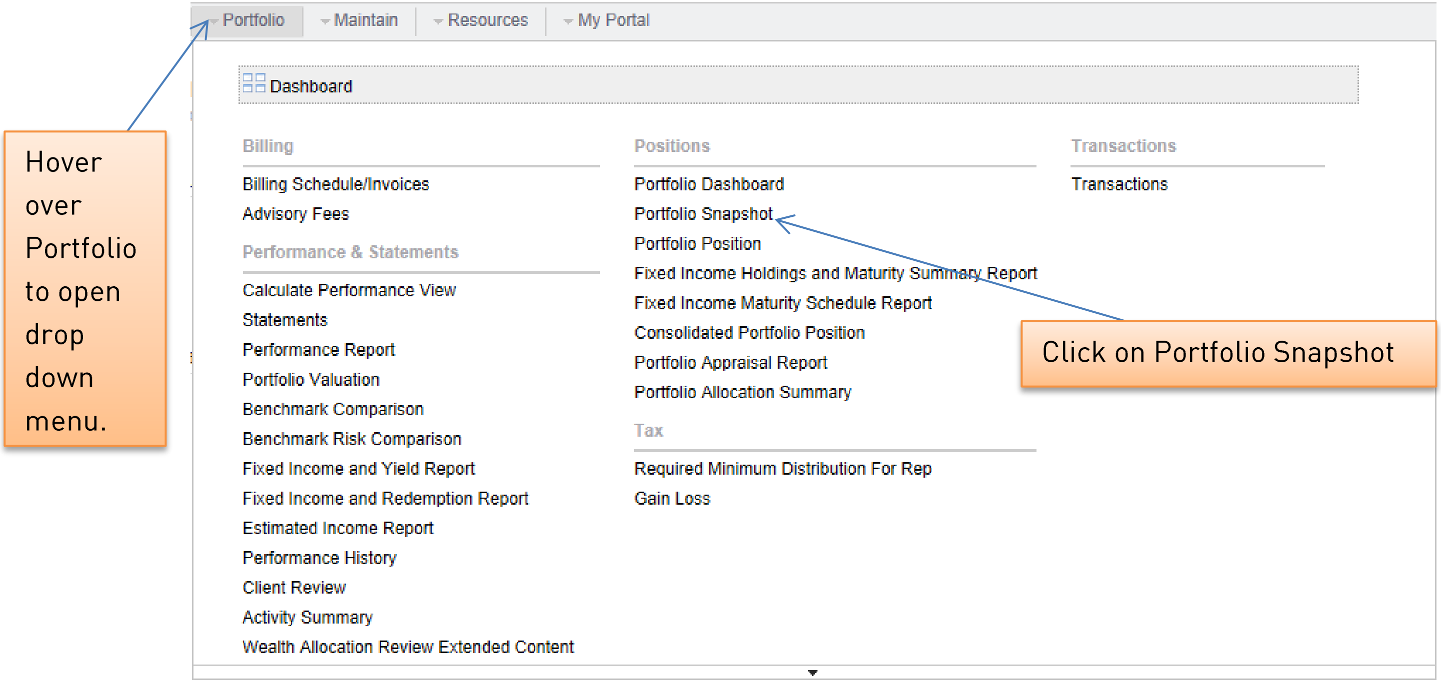


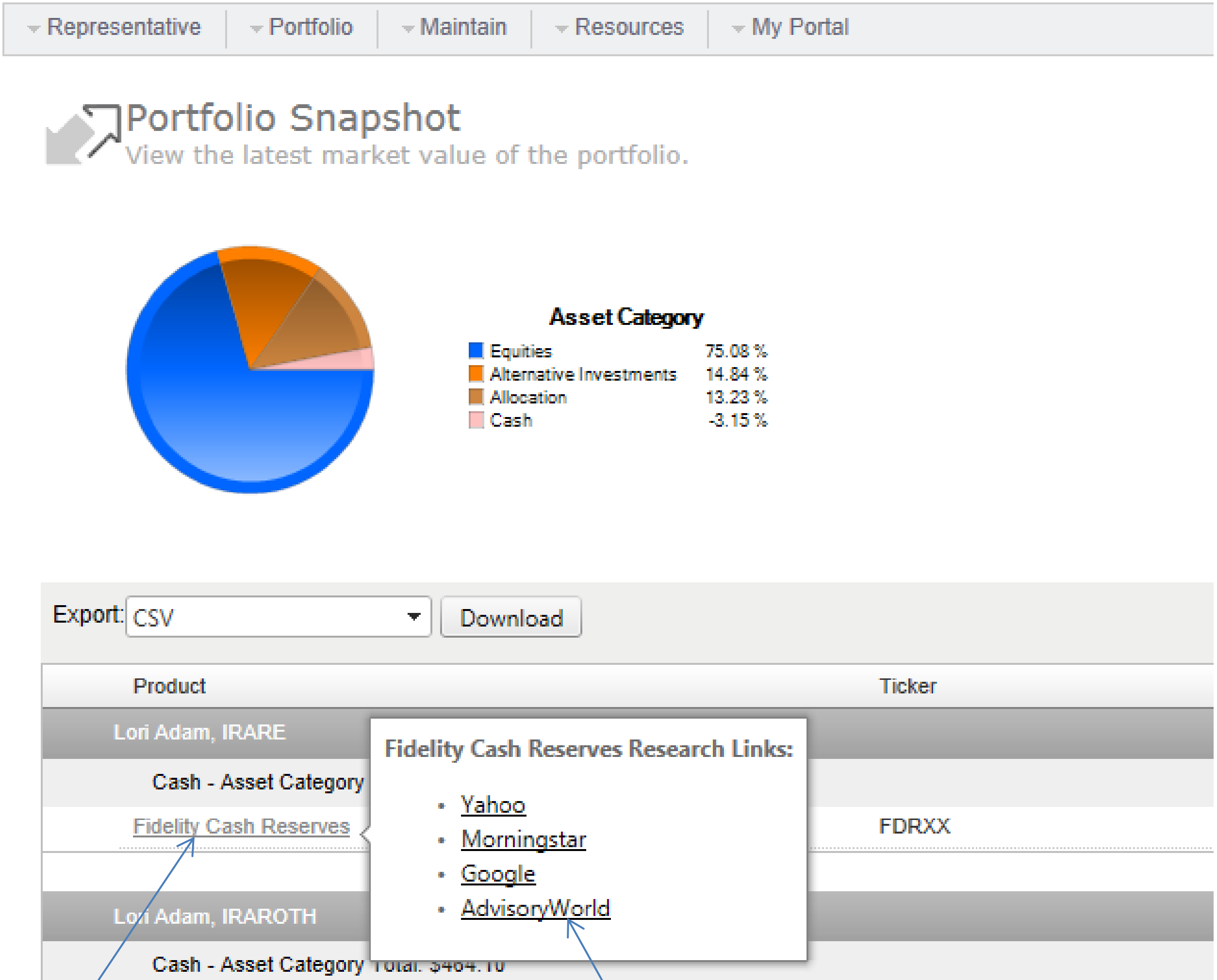
Click on Show



Find the Report Parameter titled "AdvisoryWorld HoldingScan Report" and select Include. Please note this report parameter may appear in different locations on each of these reports. This parameter must be set to "Include" for the AdvisoryWorld report to be returned. This integration is available on these standard Orion reports: Performance Report, Benchmark Risk Comparison Report, Portfolio Valuation Report, and Portfolio Position Report.

Please see below regarding access to the ticker reports "AdvisoryWorld Fact Sheets" for individual assets held within an Household/Account:





Hover the mouse over the asset

Click on the AdvisoryWorld link and this will open the AdvisoryWorld report for that asset in a separate window.