

SCANalytics Training Series: Orion Import



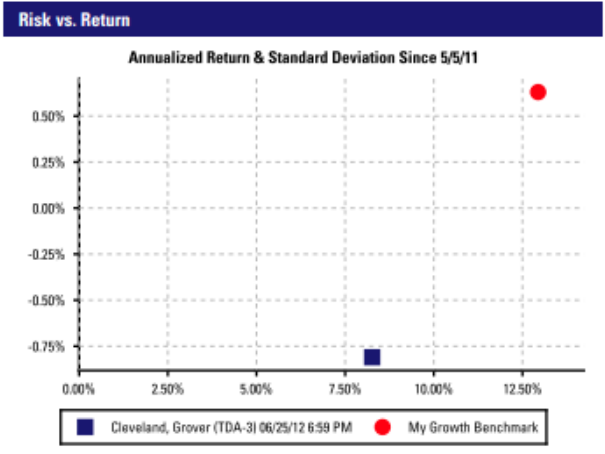
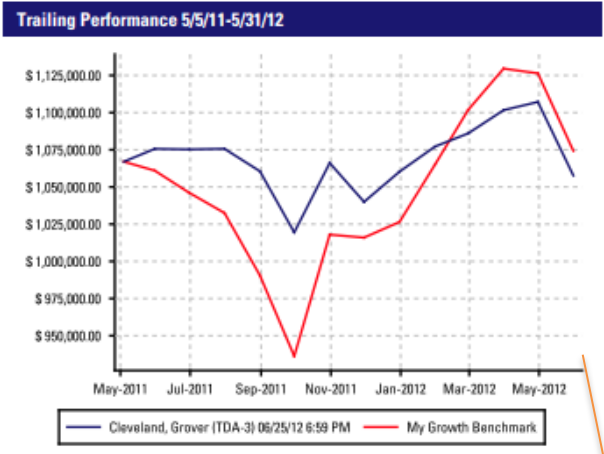
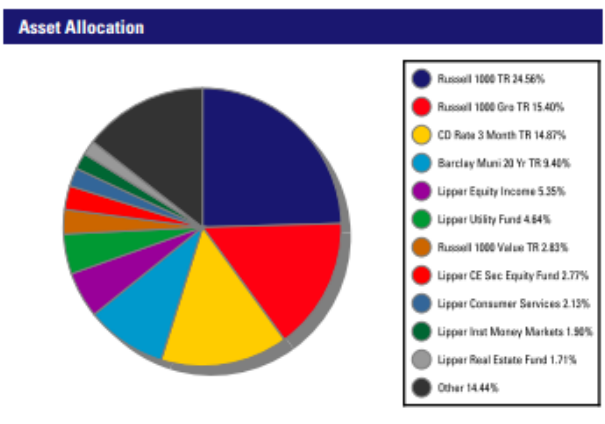
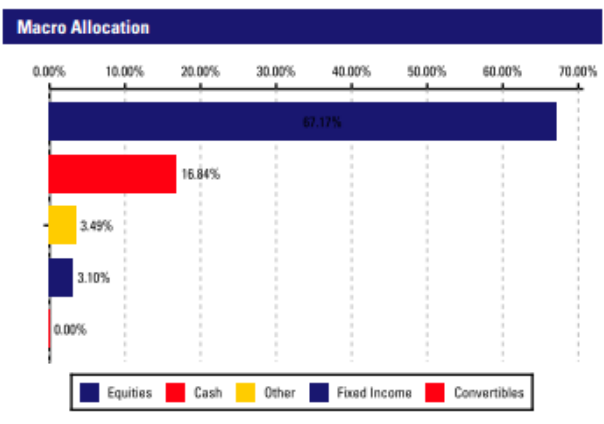
ADVISORYWORLD
FINANCIAL TECHNOLOGY

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	1 Year
Cumulative Return	-1.67%
Benchmark	1.25%
Annualized Return	-
Benchmark	-
Risk Adjusted	0.73%

Enhance your Portfolio Review and Presentation capabilities. Generate Portfolio Asset Allocation and Analytics for any Orion Account with a few clicks.

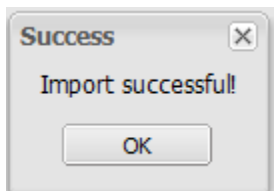
	5 Years	Since 5/5/2011
Cumulative Return	-	8.26%
Benchmark	-	12.94%
Annualized Return	-	-0.10
Benchmark	-	-1.19
Risk Adjusted	-	0.56
	-	0.78

Please select accounts to be imported from the following list. New accounts are highlighted by having their names printed in *italics*. If you select an existing account to be imported, a new Hypothetical will be created for this account.

Client Name	Account Name	Account Type	Account Number	Import
Cleveland, Grover	Cleveland, Grover (TDA-3)	Trust	10	<input checked="" type="checkbox"/>

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Select which Accounts that you'd like to import then press Import



Press OK

Illustration Name (Click to Edit)	Reports	Client Name	Date Crea...	Last Edited D...
Cleveland, Grover (TDA-3) 06/25/12 6:59 PM		Cleveland, Grover	06/25/2012	06/25/2012 Delete

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Once Imported, click on the Reports

Illustration Name (Click to Edit)	Reports	Client Name
Cleveland, Grover (TDA-3) 06/25/12 6:59 PM		Cleveland, Grover

Reports

Select Reports to be Included and Adjust Format

Hypothetical Performance	Parameters	<input type="checkbox"/>
HoldingScan	Parameters	<input checked="" type="checkbox"/>
BondScan		<input type="checkbox"/>
CompariScan	Parameters	<input type="checkbox"/>
Detailed Analytics	Parameters	<input type="checkbox"/>
Fact Sheets	Parameters	<input type="checkbox"/>
Allocation Analysis	Parameters	<input type="checkbox"/>
Company Fact Sheets		<input type="checkbox"/>
Cover Page	Parameters	<input type="checkbox"/>

Select and Report(s) then press Build Report



If you have any questions regarding this or any feature of SCANalytics, please contact AdvisoryWorld support@advisoryworld.com