Save Time with the Batch Performance Tool

Have you ever wanted to run several performance reports at once? With the Batch Performance Tool, you can! In this week's Tech Tip, we'll show you how to save time by gathering all of your reports into one place. Let's dive in!

What?

You may want to run a performance report for all households, registrations and accounts, or a combination of the three. You may even want to create groupings associated with this information (i.e., Management Style, Asset Category, Asset Class, etc.). Instead of building a custom query, you can use the Batch Performance Tool and run all of your reports in one place – saving you time.

Why?

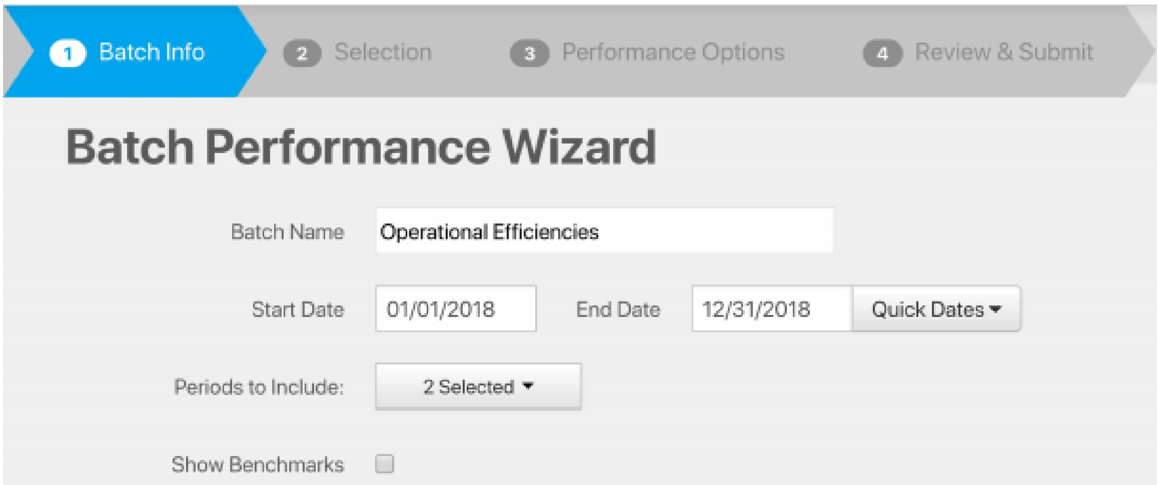
The Batch Performance Tool runs in the background – just like Report Batches. You can configure your settings, click "Run," and then come back to view your results when they are complete, rather than having to run a query and leave the browser up while it runs. The batch also automatically saves so you can go back and view your results at a convenient time.

How?

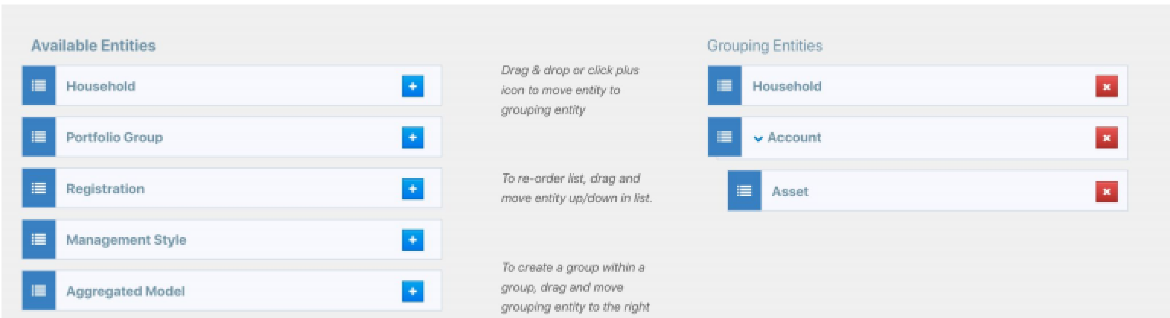
To start using the Batch Performance Tool:

1. Locate and launch the Batch Performance Tool app. 

2. If the app is not visible, you may need to have it enabled in Manage Users.
3. Within Manage Users, go to Role, select Records, and then choose Portfolio. Here you will define the Batch Performance rights, which the Admin at your firm can enable. Read, Edit, and Delete must be enabled to enable the Batch Performance app.
4. After opening the Batch Performance app, you will select the Actions Menu in the top right corner, then select "New Batch."
5. This will bring up the following screen where a Batch Name will be entered.
6. Select the Period, then select additional periods to include in the drop-down.



7. After clicking "Next," you will be brought to the "Selection" screen where you will determine if you want the batch to run at the Household, Registration, or Account level. After selecting the level, you will select the additional grouping options below:



8. After selecting groupings, click "Next" to go to the Performance Options screen.
9. This will default to the firms performance settings that have been set in the Firm Profile app. These can be adjusted as needed.
10. Click "Next" to proceed to the "Review" screen. If everything looks good,

select “Create Batch.” This will begin running the batch. You can go about your day until the batch has finished running.

Need additional help? The Performance Team is standing by! Feel free to contact us at performance@orionadvisor.com

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