

First Batch Job Process Checklist

The checklist below lists the steps you should take to setup your first batch job in Presentation Studio.

- Select the Client Presentation you want to use

Presentation Studio contains four default presentations that you can run quickly and easily for your clients. Each presentation uses different layouts of data points, giving you more variation and options. Choose the presentation that best meets your needs; whether you use these reports in client meetings, as quarterly reports that are mailed to your clients, or collate them with existing PortfolioCenter reports. For a list of the available presentation, the specification of each presentation and full-size samples, visit the [Presentations Pages and Themes Gallery](#) section of our website.

- Edit the Client Presentation

The Presentation Studio is a tool that helps you create professional branded report presentations for your clients. With the Presentation studio, you can edit presentation and page settings, import images and text, modify preview settings and create batch process jobs. Update these settings to prepare branded reports that are customized to your specifications.

For more information on editing presentations, see [Getting Started with Presentation Studio](#).

- Create and Assign Benchmark Collections

Benchmark collections are a collection of targets and indices that can be assigned to a portfolio and/or group and will only be displayed on client presentation. Each benchmark within the benchmark collections should be assigned a color palette and color identifier or a static color from a color diagram. It is essential that you assign a color to your benchmark collections since the Performance vs. Benchmarks graph uses these colors. To learn more about benchmark collections, see [Creating and Assigning Benchmark Collections](#).

- Assign Category Colors

Within the Asset Class, Sector, and Subsector details you can choose to assign a color palette and color identifier to the category or you can select a static color from a color diagram. It is essential that you assign a color to your categories since the majority of pages within Client Presentations use these colors. To learn more about assigning category colors, see [Tips and Best Practices for Selecting Category Colors for Client Presentations](#).

- Update performance numbers

The data points you find on the Client Presentations may be displayed in a more visually appealing format, but the data still needs to be correct for you to have valuable reports. Accurate performance numbers depend on complete, accurate data and appropriate interval data. For a complete list of steps you need to take to ensure accurate performance, see [Performance Calculations Checklist](#).

- Create a Set

A set is a collection of portfolios and/or groups with a common characteristic other than family ties. A Batch Process Job require a set (static or smart) in order to run the presentations. Build a set of portfolios and/or groups that you want to run using the client presentations selected earlier. To learn more about sets and their uses, visit the [Working with Sets](#) section of our website

Create the Batch Process Job

Before you can run a batch job, you must set up the batch job in Presentation Studio. For systematic instructions on creating a new Batch Job, see [Working with Batch Jobs in Presentation Studio](#).