UNDERSTANDING PRESENTATIONS, ELEMENTS, AND THEMES

Presentations are technically containers that consist of several elements combined together to produce eye-catching reports you give to your clients.

Specifically, most presentations contain pages, which contain data points, and resources such as images, and text.

In PortfolioCenter, you have the ability to change some of the text elements, assign the image resources that appear on presentations, modify the colors within the theme elements, and build pages using different layouts and elements.

This document shows you each of these elements separately and then how they all work together in a presentation.

Online
This document refers to parts of a presentation that you will find in the Presentation Studio tool. For more information about Presentation Studio and how to use it, see Working with Presentation Studio in PortfolioCenter.

ELEMENTS

There are four basic types of elements in the current version of PortfolioCenter: Text elements, Image elements Theme elements, and Page Elements. This section shows you how to find each element and gives you a little more information about them.

TEXT ELEMENTS

The text elements – or text resources – are saved sets of text that you can link to your presentations. For all text elements, you can make use of a rich-text editor to add stylistic detail to it such as color or style. You can also copy and paste formatted text from other sources to include in any of these text elements. There are five text elements in PortfolioCenter:

- Asset Class Performance Disclaimer Text – a small section of text that appears under the performance data found on the Asset Class Performance Summary pages and elements.
• Billing Disclaimer Text – A small section of text that appears at the end of the Billing Statement and Average Value Billing Fee Audit pages.

• Cover Letter Text – a full page of text included on the Cover Letter page. It can be used as market commentary letter or some other communication for your clients.

• Footer Text – a band of text that appears at the bottom of each page containing the footer element.

• No Text – if you do not wish to display text on a page, you can select this option.

• Performance Disclaimer Text – a small section of text that appears under the performance elements on a page.

• Report Disclaimer Text – also a full page of text, this element is only included in the Extended Client Meeting presentation. It can be used as market commentary, letter or some other communication for your clients, but is typically used to communicate some sort of extended disclaimer required for compliance purposes.

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Online

For more information about working with text and all the features of the text elements, see Working with Text in Presentation Studio.

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**IMAGE ELEMENTS**

Image elements, like text elements, are saved image resources that are linked to certain areas in the presentations.

Currently, there only three image elements in PortfolioCenter:

• Company Logo – a small image that appears on the cover page and the top of each page in all presentations.

• Large Image – a larger image that appears only on the cover page of the Client Meeting presentation. It is intended to be used as a staff photo.

• No Image – if you do not wish to display an image on a page, you can select this option.

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Online

For more information about working with images and features of the image elements, see Working with Images in Presentation Studio.
THEME ELEMENTS

Text and image elements are items you can fully customize. However, Themes are the part of the presentation that has limited customization, but is the largest visual impact of your presentations.

Themes consist of two parts:

- The color palette – this is the first thing you notice on the reports and it affects not only the page color, but can affect the color of the asset classes on the reports.
- Font Style – This is the style of font selected for titles as well as body text for pre-designed pages.

In the default package in the current version of PortfolioCenter, there are nine themes:

- Block Theme – contains bolder colors than the clean theme, as well as sans serif fonts for a more modern look, but still giving you the flexibility to incorporate other documents or reports with the presentation.
- Clean Theme – contains muted colors and serif fonts to create a classical look that can be easily integrated with reports, articles and other documents you want to collate with client presentations.
- Color Themes (Pattern Gradient, Pattern Tabbed, Solid Gradient and Solid Tabbed) – contains white pages with a colored border and bold color schemes, coupled with sans serif fonts give these themes a professional look that is perfect for onsite client meetings.
- Eco Theme – delivers that same valuable information using less paper by reducing the spaces between elements and rows of data for shorter, more succinct documents.
- Ocean Themes (Blue, Green and Burgundy) – full-page gradient color and vibrant color schemes, coupled with sans serif fonts give these themes a bold, eye catching look that is perfect for website distribution.

THEME COLOR PALETTE

The colors used on a page are determined by the theme styles defined within each theme. There are four basic types of theme styles you can customize in Presentation Studio: page and background colors, text colors, border and line colors, and graph and category colors.
**CATEGORY COLORS**

For the Portfolio Holdings, Position Performance Summary, Model vs. Actual Allocation, and Asset Allocation pie chart found on multiple pages, you will see color coded category data. There are two options for associating colors with categories:

- Assign the category to a color number in the theme palette – this is the recommended method, and will ensure that the colors on the reports always coordinate with the categories.

- Assign a specific color to each category – this method entails assigning a color to a category that persists regardless of the theme selected.

**THEME FONT STYLE**

Because themes also include font style, it is important to know how the font selected appears on the report presentations. Presentation Studio will use the closest font to the one assigned to ensure you have a presentation closest to what the designer envisioned.

For example, the font style assigned to the Clean theme is Times New Roman, a serif font. If, however, your computer does not have Times New Roman installed, Presentation Studio picks another font that is in the Serif family and looks similar to Times New Roman.

In the image to the right, you can see the difference between the Serif family font (the white page) and the San Serif family font (the blue page).
PAGE ELEMENTS

In addition to the array of pre-designed pages available in Presentation Studio, you can build custom pages with any variety of elements or layouts you want using the Page Customization tool.

A page consists of two parts:

- The page layout – this determines how many data elements can be added to the page as well whether the page will be in landscape or portrait.
- Data elements – This determines the client information that displays on the page.

In the current version of PortfolioCenter, there are sixteen data elements in six different categories:

- Graph and Chart Elements – contains the Asset Allocation Chart, Asset Allocation Chart and Table, Model vs. Actual Allocation Charts, Performance vs. Benchmarks Graph, and the Portfolio Value vs. Cumulative Net Investment Graph elements.
- Holdings Elements – contains the Asset Allocation Chart, Asset Allocation Chart and Table, Holdings Table, and the Model vs. Actual Allocation Charts elements.
- Performance Elements – contains the Account Performance Summary Table, Asset Class Performance Summary Consolidated Table, Asset Class Performance Summary Detailed Table, Components of Change Table, Performance vs. Benchmarks Graph, Performance vs. Benchmarks Table, Portfolio Value vs. Cumulative Net Investment Graph, and the Position Performance Summary Table element.

Online
For more information about custom pages, see the Creating a Customized Page in Presentation Studio video.
PUTTING EVERYTHING TOGETHER IN PRESENTATION STUDIO

ADDING AND EDITING TEXT

The text elements – or text resources – are saved sets of text that you can link to your presentations. For all text elements, you can make use of a rich-text editor to add stylistic detail to it such as color or style. You can also copy and paste formatted text from other sources to include in any of these text elements. There are five text elements in the current version of PortfolioCenter:

ADDING IMAGES

Image elements, like text elements, are saved image resources that are linked to certain areas in the presentations.

Currently, there are only three image elements in PortfolioCenter that use an image file: the Large Image, Company Logo, and No Image. Open each element and click the Replace Image button to select the image you want to use as the resource. Client Presentations support .JPG, .BMP and .PNG file types.

ADDING AND EDITING A PAGE

The page elements are customized pages that can be added to any presentation.

The current version of PortfolioCenter provides four sample custom pages: Holdings Page Sample, Portfolio Overview Portrait Sample, Portfolio Overview Sample, and the Position Performance Summary Sample.

Once a page has been added to a presentation, you can update the page settings to further customizing the appearance of the page.
SELECTING THE THEME

Finally, assign the stylistic theme you want to use with the presentation. To select a theme, open the presentation to see the available settings in the Properties section to the right.

The Theme setting is located under the properties section. Click the browse box to the right of the Theme setting to select the theme you want to use, similar to the image to the right. Once you save the settings, you should see the changes in the preview pane in Presentation Studio.

Online
For more information about assigning Text, Images and Themes in Presentation Studio, see:

- Working with Text in Presentation Studio
- Working with Images in Presentation Studio
- Creating a Customized Page in Presentation Studio (video)
- Working with Themes in Presentation Studio