

As performance for your Investments is computed by Solovis, you will not need to upload Investment performance data manually. You might do so though for assets such as your Total Return Index Entities or if you want to track performance of a prospective manager that you are considering making a future investment in. When necessary, this data can be uploaded from Data > Spreadsheet Imports > Performance.

UPLOADING PERFORMANCE

The simplest way to upload a return history is to use a formatted Excel spreadsheet for performance data upload under **Data > Spreadsheet Imports > Performance**. Before preparing to load performance to an Entity, ensure that you have created and setup the **Import Code** property for the asset under the **Data Management** tab of the Asset Info page for the Entity.

- From the gateway portal, navigate to **Data > Spreadsheet Imports > Performance**
- Either copy and paste the example **Spreadsheet Format** displayed in the **Upload Documentation** area into your Excel spreadsheet or use the **Create Performance Upload Template** link to open a ready-made performance upload template
- Enter in the data you are looking to upload. The **Import Code** property should be entered in the **Resource** column A, the date entered into the **Date** Column B and the return entered in the **MtdReturn** column C (note that the return must be formatted as a percent (or entered as 0.025, not 2.5, for example)
- Once your data is ready to import, save and close the file to your desired location and upload the file under **Data > Spreadsheet Imports > Performance** by either browsing to locate the file or dragging and dropping it into the **File Upload** area.

	A	B	C	D
1	Resource Property	DataImport.ImportCode		
2				
3	Resource	Date	MtdReturn	
4	Russell 2000	8/31/2017	1.50%	
5	Russell 2000	7/31/2017	1.80%	
6	Russell 2000	6/30/2017	2.36%	
7	Russell 2000	5/31/2017	-0.99%	
8	Russell 2000	4/30/2017	2.35%	
9	Russell 2000			
10	Russell 2000			
11	Russell 2000			

Example Format for Upload of Benchmark Entity Performance

* For Clients Using the Bloomberg Integration *

After setting up Benchmark Entities in Solovis, historical performance for the Entity can be uploaded using the above steps for uploading performance. If your firm has enabled an integration with Bloomberg, be sure that you have added the Bloomberg Ticker property to the benchmark Entity (from the Data Management tab of the Asset Info page) so that you can use the Bloomberg data feed to generate performance and pricing for the Entity going forward.