

# Calculating Performance Bond Requirements

First, if you have a Portfolio dialog box open, click **OK** to close it.

There are several ways to request that performance bond requirements be calculated for one or more portfolio(s):

- Click the **Calculate** button on the toolbar, or
- Press **Ctrl-K**, the keyboard shortcut for calculation, or
- Select **Calculate Portfolio(s)** on the **File** menu, or
- Point to a particular portfolio, right-click, then select **Calculate Portfolio(s)** from the menu that displays.

If you use either of the first two methods, if you haven't first selected a specific portfolio, the **Select Portfolios to Calculate** dialog box displays. You can then specify whether you want to calculate requirements for:

- all portfolios
- all portfolios for a particular point in time
- a specific set of portfolios for a particular point in time. In this case, you can use the standard Windows methods (click, shift-click, ctrl-click) to select from the set of available portfolios.

If you do calculate requirements for a specific portfolio, after the requirement is determined, the Portfolio dialog box for that portfolio will display with the "Performance Bond Requirements" tab selected, so that you can immediately view the overall requirement.