Morningstar® Office Tip Sheet:
Inserting Dynamic Notes into a Template

Overview

Inserting dynamic notes is another way to personalize your Report Studio template for your clients. Dynamic notes allow you to create categories of notes from the Note Manager page in Morningstar Office, which are then inserted into a Report Studio template. When you subsequently run a Report Studio template in a batch, the note category content is changed for each client with a note created for that category.

Before you can insert dynamic text into a template, you must first create the Note Category Settings.

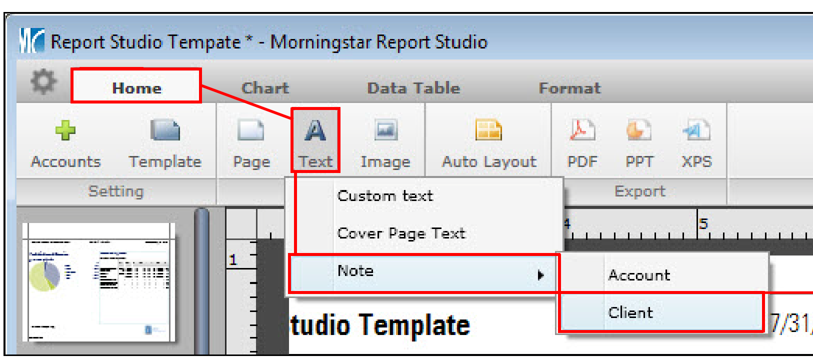
From there, you must create an individual note for each client for whom you intend to run the Report Studio Template.

How do I add dynamic Note content to my template?

Once your note categories and notes are created, you can insert dynamic note content into a template. To add dynamic notes, do the following:

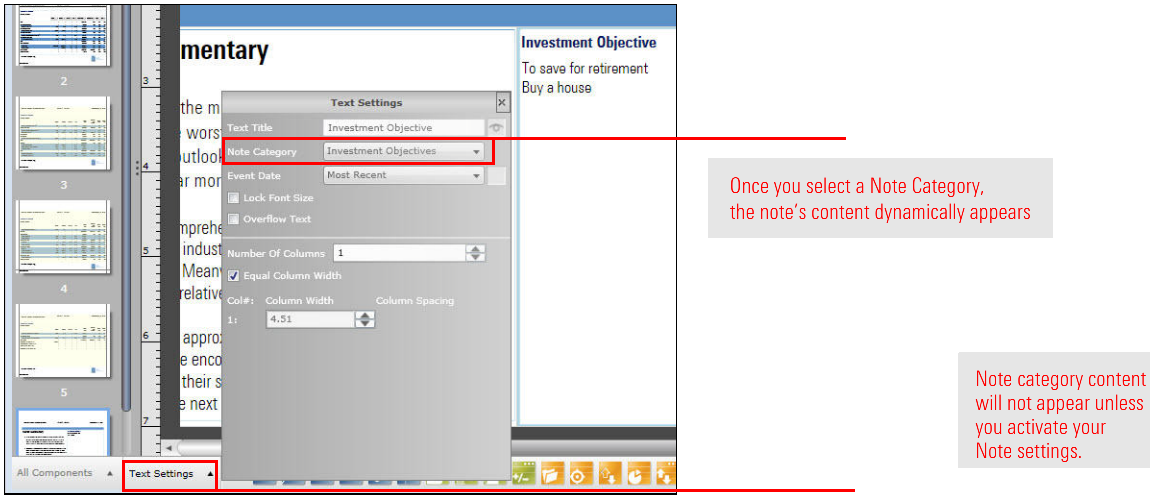
1. Click inside the **page** or **cell** for which you want to add dynamic text, in order to activate it.
2. Click **Home**…**Text**…**Note**…**Client**.

☞ Note: You can also take this action from the Format tab in the Report Studio window.



If you create notes at the individual account level, be sure to select Account here, rather than Client

3. Click on **Note Settings**, and select the **Note Category** you want to insert from the Note Category drop down menu. Once complete, the text from your note will dynamically appear within the section you activated.



When you add your Report Studio template to a batch report, every client with an Investment Objective template assigned to them will have their unique investment goals inserted into their client report.

► Click here to view the companion video to this document.
► Click here to access help topics related to Report Studio.