Morningstar[®] Office Tip Sheet: Setting Time Ranges for Bar Charts

When working with bar charts in a template, Report Studio offers several options to customize the time period setup, offering you a variety of options not available in Morningstar Office's standard reports.

Overview

To access the time period options, do the following:

- 1. Click inside the **bar chart** in order to activate it
- 2. From the bottom of the Report Studio window, click the **Chart Settings** button. The Chart Settings dialog box opens.
- 3. Click **Setup** (next to the Time Period field). The Time Period Setup dialog box opens.



How do I access the time period options for a bar chart?

The time period you select for a bar chart depends on the type of data you want to display. Before you select your time period, consider the type of returns you want to include. The following table describes the options available to you from the Time Periods area on the Time Period Setup dialog box.

What Time Period options are available?

Setting	Time Period Description
Single Period	Illustrate one bar (or window) based on your Start date and End date.
Trailing Period	Illustrates multiple bars (or windows) based on your Start date and End date trailing. Your moving step will determine the frequency in which the bar (or window) will overlap within the period you selected. Here your start date for each period will move while your End date will remain static.
Forward Extending Period	Illustrates multiple bars (or windows) based on your Start date and End date from the beginning. Your moving step will determine the frequency in which the bar (or window) will move forward within the period you selected.
Rolling Window	Illustrates multiple bars (or windows) based on your Start date and End date. In this case, the Start date and End date will both move together based on your bar (or window) size. Your moving step will still determine the frequency the bar (or window) will overlap within the period you selected.
Regular Period to Start	Illustrates multiple bars (or windows) based on your Start date and End date. This selection illustrates the beginning period to ending period. Here, you can select you bar (or window) size, and the number of columns you would like to generate for your chart, however, you cannot select a moving step, meaning you cannot overlap your period
Regular Period to End	Illustrates multiple bars (or windows) based on your Start date and End date. This selection illustrates the ending period to beginning period. Here, you can select you bar (or window) size, and the number of columns you would like to generate on your chart, however, you cannot select a moving step, meaning you cannot overlap your period.

Select the **Start** and **End** date you would like to use in your bar chart. Select the type of Time Period you would like to display.

How do I use the Time Period Setup dialog box?

d to add, edit, or remov	e time pe <mark>r</mark> iods.			
ear ago t Month End	 8/1/2014 7/31/2015 	15		See the table above for descriptions of each option here
ingle period Frailing periods Forward extending periods	Rolling windo Regular perio Regular perio	w ods from start ods from end		
ear Ionths Add column(s	•			The Window size field determin the length of your return period
Display Name (editable) 8/1/2010 - 10/31/2010 8/1/2010 - 1/31/2011	Label Rule Start Date to Enc 🔻 Start Date to Enc 🔻		^ ^ ^	The Moving step field controls t frequency in which your Window size moves (or overlaps within the designated time peri
8/1/2010 - 4/30/2011 8/1/2010 - 7/31/2011 8/1/2010 - 10/31/2011 8/1/2010 - 1/31/2012	Start Date to Enc		¥.	
	ear ago t Month End iingle period realing periods corward extending periods fonths Add column(s Display Name (editable) 8/1/2010 - 10/31/2011 8/1/2010 - 4/30/2011 8/1/2010 - 7/31/2011 8/1/2010 - 10/31/2011 8/1/2010 - 10/31/2011 8/1/2010 - 1/31/2011	ear ago F1/2014 t Month End T7/31/2015 ingle period Rolling windo rrailing periods Regular period corward extending periods Regular period corward extending periods Regular period ear T Add column(s) Display Name (editable) Label Rule 8/1/2010 - 10/31/2010 Start Date to Enc T 8/1/2010 - 1/31/2011 Start Date to Enc T 8/1/2010 - 1/31/2012 Start Date to Enc T	ear ago v 8/1/2014 15 t Month End 7/31/2015 15 Single period Regular periods from start orward extending periods Regular periods from end ear v fonths v Add column(s) Display Name (editable) Label Rule 8/1/2010 - 10/31/2010 Start Date to Enc v 8/1/2010 - 1/31/2011 Start Date to Enc v	ear ago \$71/2014 15 t Month End 7/31/2015 15 Single period Rolling window rrailing periods Regular periods from start orward extending periods Regular periods from end ear • ionths • Add column(s) Add column(s) B/1/2010 - 10/31/2010 Start Date to Ent • 8/1/2010 - 1/31/2011 Start Date to Ent •

If you want to change the number of columns within a bar chart, do the following from the Time Period Setup dialog box:

- 1. Under the Selected Time Period section, click the **Remove all** button.
- 2. In the Number of columns field, type the number of columns you want to display.
- 3. Click the Add column(s) button.
 - Note: When your Time Period option is Single Time Period or Rolling Period, the system automatically selects the number of columns for you. In these cases, the Number of Columns field is grayed out and unavailable. To add system-generated columns, click the **Add Column(s)** button to the right of the Number of columns field.

What do I need to know about adding columns to a bar chart?

	Time Period	Setup	
The time period tab	is used to add, edit, or remove	time pe <mark>r</mark> iods.	
Time Period			
Start date	1 Year ago	• 8/1/2014 [15]	
End date	Last Month End	- 7/31/2015 15	
Time Periods	Single period	Rolling window	
	Trailing periods	Regular periods from start	
	Forward extending periods	Regular periods from end	Enter the number of columns
Window size	1 Year	*	to add to the bar chart here,
Moving step	3 Months	•	
Number of columns			
Number of columns	d Add column(s)		
Number of columns	d Add column(s)		
Number of columns Selected Time Perio	d Add column(s)	abel Rule	
Number of columns Selected Time Perio Period	d Add column(s) d Display Name (editable)	abel Rule	
Number of columns Selected Time Perio Period	d Add column(s)	abel Rule	
Number of columns Selected Time Perio	d Add column(s)	abel Rule	
Number of columns Selected Time Perio Period	d Add column(s) d Display Name (editable) L	abel Rule	Use this button to remove
Number of columns Selected Time Perio	d Add column(s)	abel Rule	Use this button to remove all existing time periods
Number of columns Selected Time Perio Period	d Add column(s)	abel Rule	Use this button to remove all existing time periods
Number of columns Selected Time Perio Period Select	d Add column(s) d Display Name (editable) L All Reverse Order	abel Rule	Use this button to remove all existing time periods

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

M RNINGSTAR®