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?

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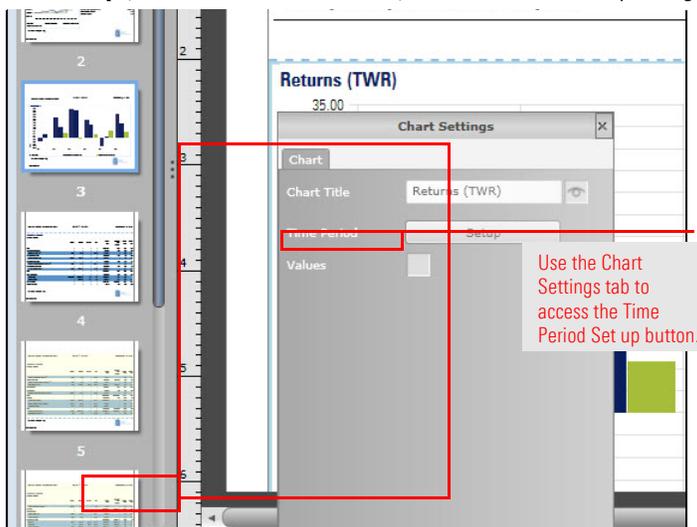
The time period you select for a bar chart depends on the type of data you want to display. Before you select your time period, consider the type of returns you want to include. The following table describes the options available to you from the Time Periods area on the Time Period Setup dialog box.

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?

See the table above for descriptions of each option here

The Window size field determines the length of your return period

The Moving step field controls the frequency in which your Window size moves (or overlaps) within the designated time period

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.
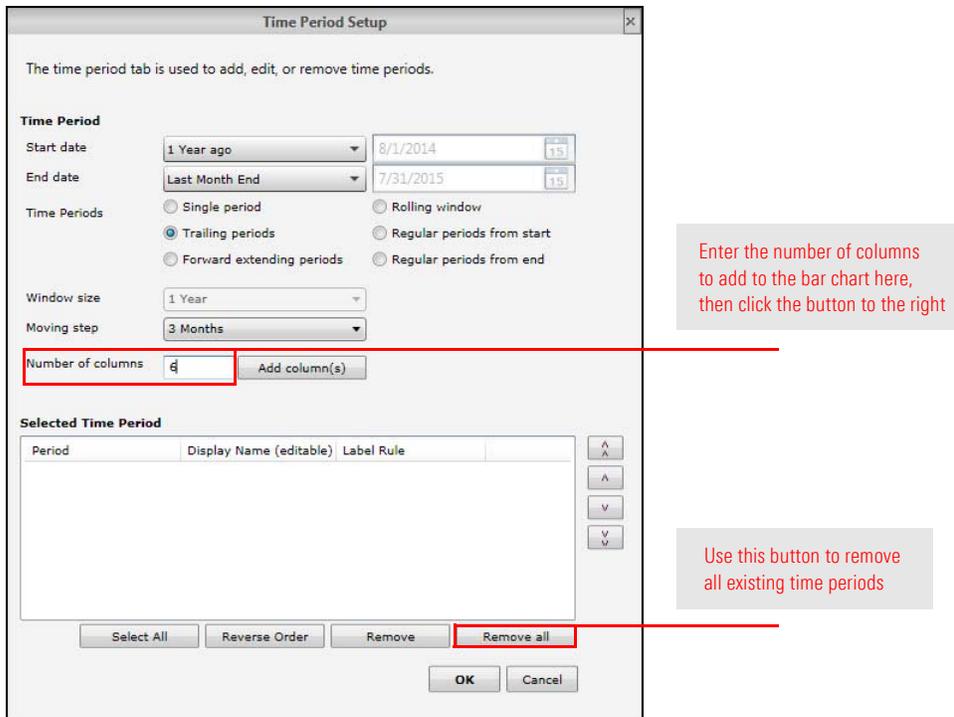
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