

Morningstar® Office Tip Sheet:

Choosing a Report Studio Template

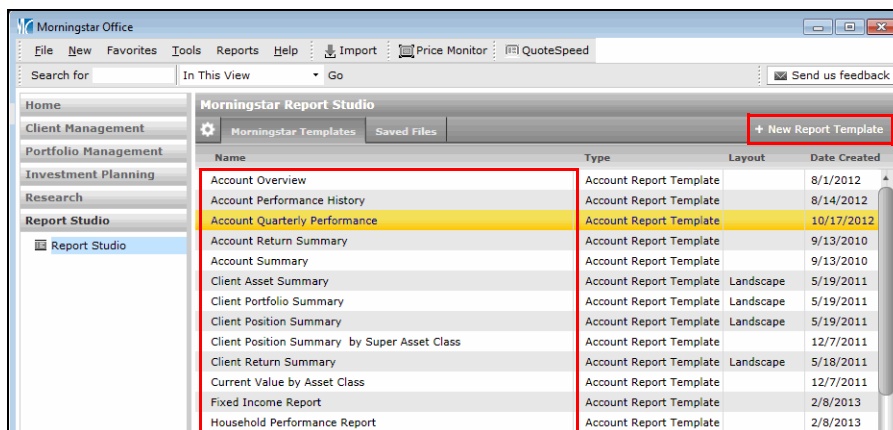
Once you set your global Application Settings for Report Studio, the next step is to decide how to build a report template. You can either select a pre-designed Morningstar template, or create brand-new report from a blank template. Choosing a pre-designed template allows you to build upon an existing template, while a blank template gives you the freedom to design a report from start to finish.

Overview

To use a pre-designed Morningstar template, be sure the **Morningstar Templates** tab is selected within the Report Studio page, then **double-click** the **template** you want to use.

How do I choose or create a template?

To create a blank template, click the **New Report Templates** icon in the upper-right corner of the Report Studio page. The Create New Report dialog box opens. Here, you can create a New Blank Report to design your own unique template, or use a Morningstar Template, or use a Saved Report Template.



Click here to create to design your own template from scratch

Double-click an item here to build a template based on an existing report template

If you want to make only small changes to an existing report – such as changing the font, font size, or colors used on the report – start with the appropriate Morningstar Template. If you are instead looking to make a report that differs significantly from anything that exists in Morningstar Office today, create a New Blank Report.

What do I need to know about choosing a template?

- ▶ Click [here](#) to view a companion video to this document.
- ▶ Click [here](#) to access help topics related to Report Studio.