Morningstar® Office Tip Sheet: Choosing your Display Client

Overview

Whether you use a Morningstar template, or create one of your own, when working in Report Studio you must select a display client. A display client is used to provide a data source to work with when building your report template. That is, a display client allows you to see actual information from a client and that client's accounts on the report template as you modify or build it.

Once your report template is complete, you can then create a PDF of the report using your display client, or run the report for multiple clients at once, using the batch reporting tool.

What do I need to know about selecting a display account/client?

When choosing a display client for a report template, note the following important points:

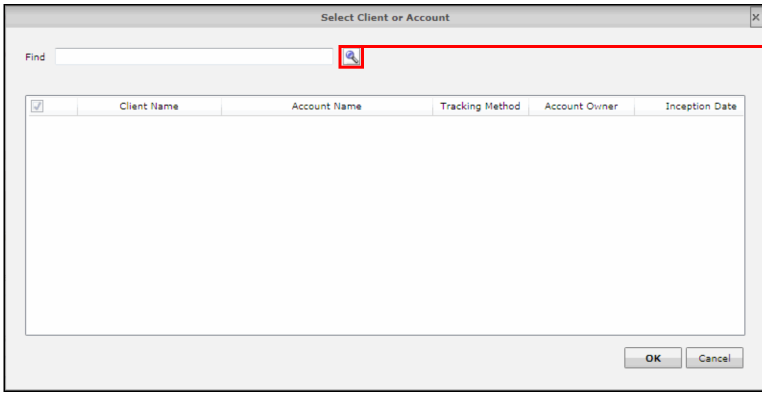
- Choose a small client with three or fewer accounts, to avoid a delay in loading the data on the report template.
- Choose a client with only transactional accounts; some report components will not work with quick accounts.
- Choose a client whose accounts contain no more than 25 holdings; this also increases the speed of the design process.

☞ Note: Once the report template is complete, you can (and may want to) change the display client to preview how the report template looks with different types of clients and accounts.

How do I select a display client or account?

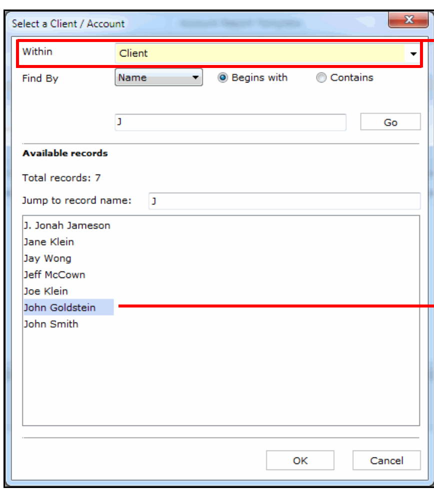
Once you select a report template type (Morningstar or custom), the Select Client or Account dialog box opens. From here, do the following:

1. Click the **magnifying glass** icon to the right of the Find field. The Find Clients dialog box opens.



Use this icon to select a transactional account or client

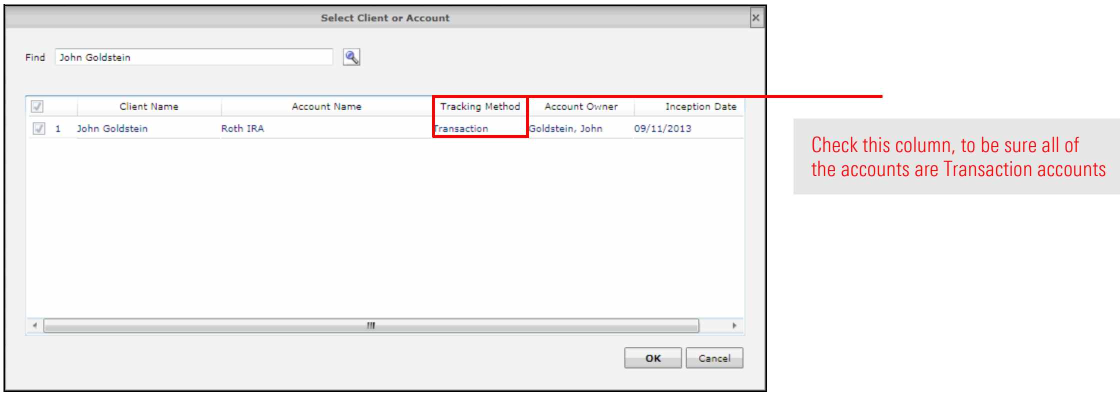
2. Change the **Within** drop-down field to **Clients**.
3. In the search field, type in a client's **name** (you can enter just part of the name, or leave the field blank to see all clients), then click **Go**.
4. **Double-click** the **name** of the client you want to use. The client's accounts now appear in the Select Client or Account dialog box.



Use this drop-down field to switch from looking for an account to looking for a client

Double-click the name of the client whose account data you want to see protrayed on your template

5. Check the Tracking Method column. If any Quick Accounts appear, repeat steps 1-4 to choose a different client.



6. Click **OK**.

What do I need to know about changing the display client?

Besides choosing a client with only transactional accounts, be sure the accounts have the right kind of data you want to model in the template. For example, if you are constructing a template to highlight the fixed-income holdings of an account, be sure this asset class is well represented in the account(s). You can always change the client or accounts from within the template by using the Accounts icon on the toolbar.

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