

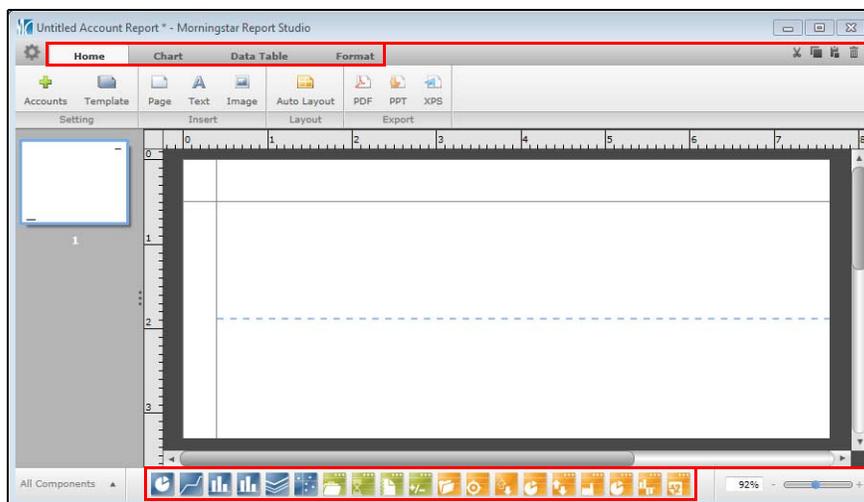
Morningstar[®] Office Tip Sheet: Designing your Template

Once you've chosen your display client, a design page opens. Before designing your template, review your customization options and how they affect your template.

Overview

Your design is created through the use of two different tools:

- ▶ **Tabs**, which control your **design**, or how the template will look, and
- ▶ **Components**, which control the **data**, or the type of information you want to display.

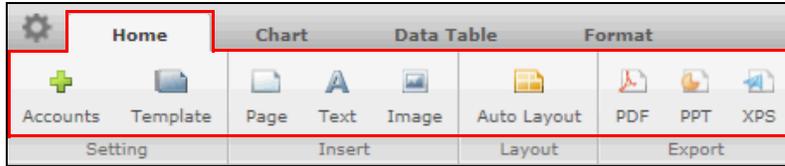


Use these tabs to adjust the report's visual design

Use the component icons to determine the type of data displayed

The following table describes what you can do using the different tabs at the top of the Report Studio design window:

What do I need to know about tabs and components?



Each tab has a number of icons to assist you in crafting the presentation of your report's content

Use this tab...	To add these design elements...
Home	<ul style="list-style-type: none"> ▶ Change the display client or account ▶ Specify template-level settings (if making specific changes from your global Application Settings) ▶ Add a page ▶ Insert an image (such as your logo)
Chart	<ul style="list-style-type: none"> ▶ Set a time range for specific chart components ▶ Change a chart component's font, size, style, and alignment ▶ Change the decimal count for chart components
Data table	<ul style="list-style-type: none"> ▶ Edit the grid lines in a data table ▶ Change a table component's font, size, style, and alignment ▶ Change the decimal count for table components
Format	<ul style="list-style-type: none"> ▶ Add headers and footers to a report ▶ Add text boxes ▶ Insert images ▶ Change text box font, size, style, and alignment ▶ Add text box bullet points or numbering

Note: Each tab also allows you to divide your page into different sections, and create a PDF or PowerPoint slide from all pages in a report.

The following table describes the differences between the three types of components (marked by different colors) available at the bottom of the Report Studio window:



Use this color component...	To add this type of data...
Blue	Charts and graphs
Green	Data tables that take up a full page. These tables provide detailed account and holding information.
Orange	Data tables that can applied to just a section of a page. These tables provide broad account and holding information.

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