

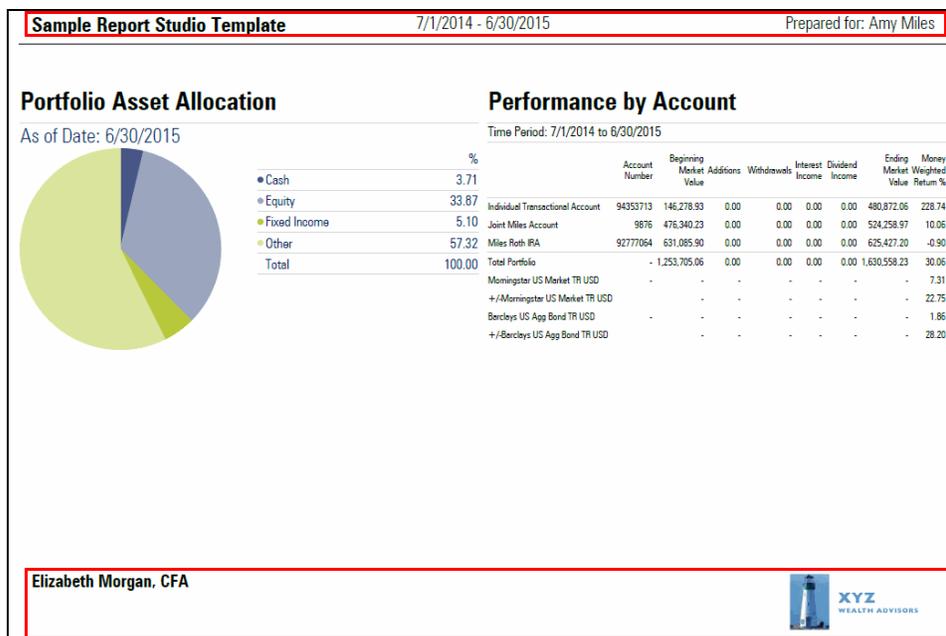
Morningstar® Office Tip Sheet: Including Headers and Footers on Your Reports

All of the Morningstar templates in Report Studio already include headers and footers. Before adding components to a custom report template, however, it's important you first create your own headers and footers for the report. Headers and footers can be customized to add dynamic data points, images, or text. They are a great way to personalize your templates, and maintain your firm's identity.

Overview

You can select from several different standard headers and footers, or you can create your own custom headers and footers.

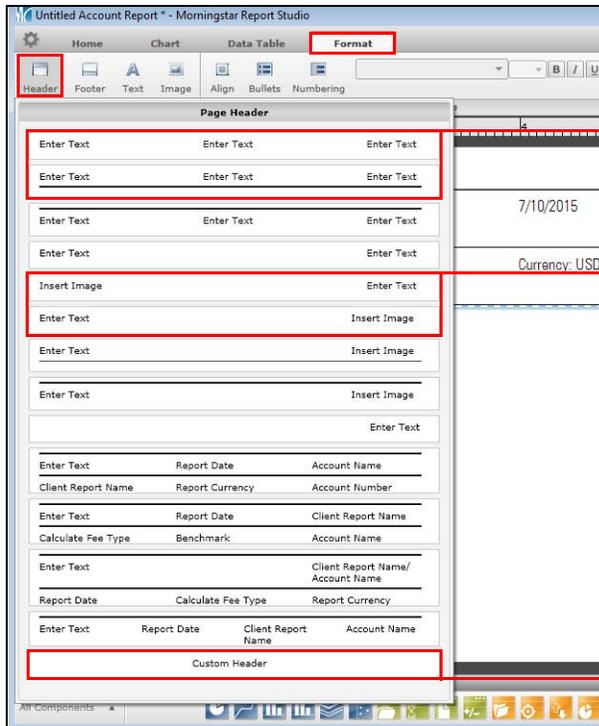
 Note: Creating custom headers and footers is covered in another tip sheet.



Note the highlighted content for the header and footer areas on this page

The icon for editing headers and footers is located under the **Format** tab. Options for headers include a number of combinations of either text fields (e.g., text in both corners of the header), text and image combinations (e.g., one on the left, the other on the right), and more. Click once on any **option** to select it for your report template.

How do I include headers and footers for a report template?

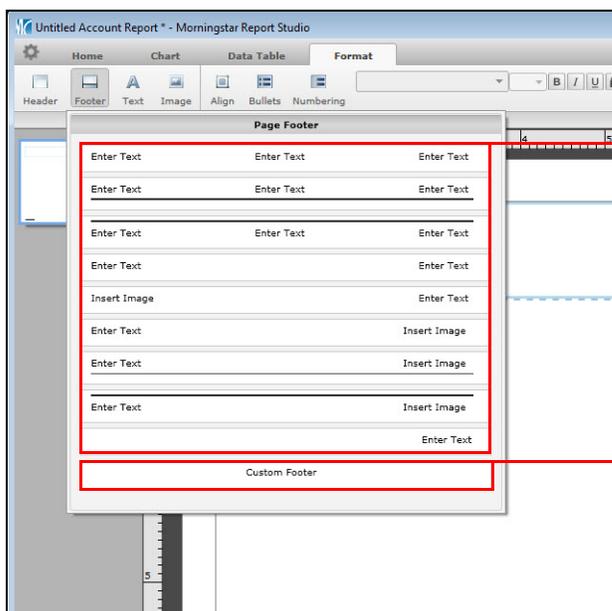


These two header options are identical, except the bottom one includes a border beneath the header

These two header options are mirror images of one another, with the top one including an image on the left side of the header, and the bottom option including an image on the right side of the header

Use this option to add a blank space you can design from scratch

Footers offer fewer options than you will find under the Headers icon, but many of these are the same options that you would have seen in the Headers menu. As with the header, simply click the **option** you want to include on the page.



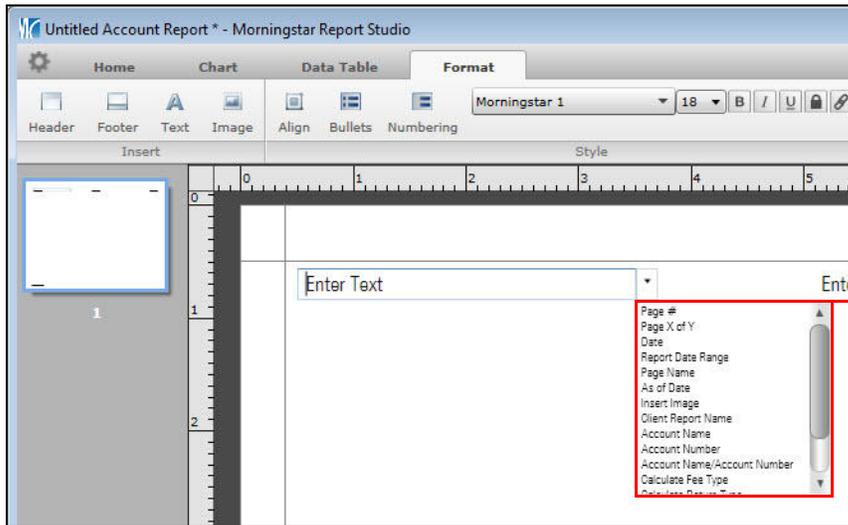
Select any of these standard footers to add data points, text, or images

Use this option to add a blank space you can design from scratch

Once you select a header or footer to use, you then need to add content to it. To add text, an image, or another data point to either a header or a footer, Do the following:

How do I add content to headers and footers?

1. **Double-click** on any header component, such as **Enter Text** or **Insert Image**.
2. If entering text, you can either type your own **text**, or use the **drop-down field** to select a pre-defined variable.
3. If inserting an image, such as your firm's logo, the Open dialog box opens. Navigate to the **image file** you want to use, then select it and click **Open**.

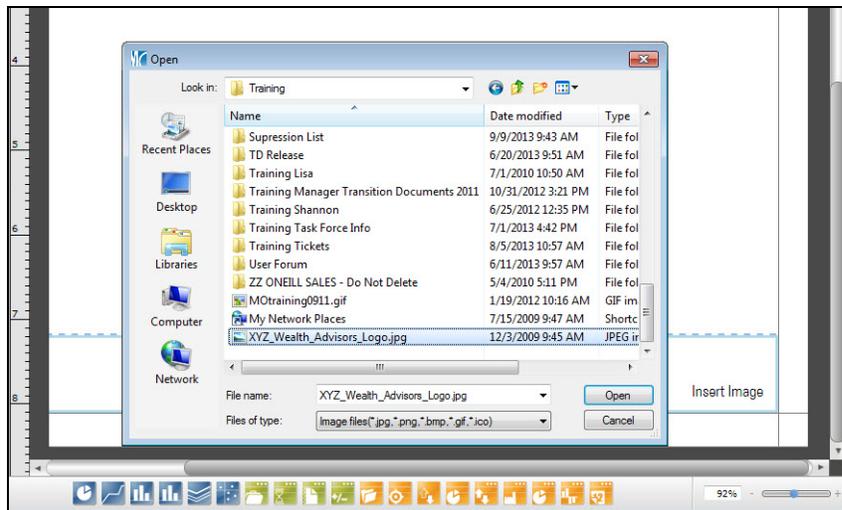


These data points dynamically update when you run this report in a batch, but text entries remain static

To add your logo to a header or and footer, do the following:

How do I add my logo to my headers and footers?

1. **Double-click** on any **Insert Image** field. The Open dialog box opens.
2. Use the Open dialog box to navigate to where the **logo** file is stored on your local drive.
3. Select the correct image file, then click **Open**.



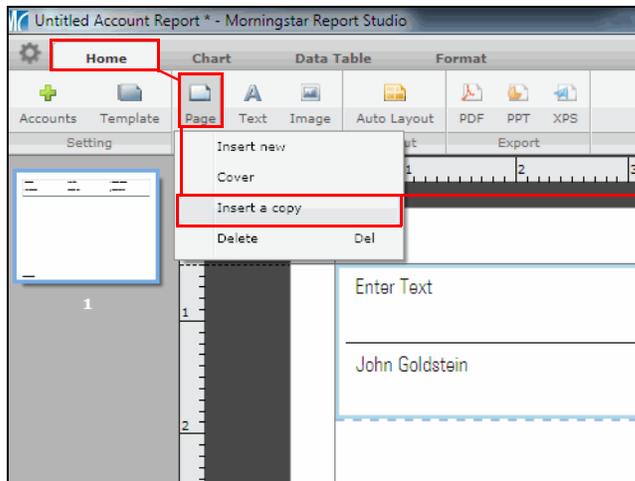
After you select your logo, click open, and your logo will be visible within the template.

As a final tip, if you intend to add more pages to a report template, once you create your headers and footers for the first page be sure to make a copy of the page. If you choose not to copy your first page, but instead create a new page for the report by inserting a new page, then you will then have to recreate your headers and footers for the new page.

What else do I need to know about headers and footers?

To make a copy of an existing page in your report template, do the following:

1. Select the **Home** tab.
2. Click the **Page** icon, then select **Insert a copy**. The new page appears automatically in the left-hand navigation pane.



Choose this option, rather than Insert New, to ensure your headers and footers carry over to subsequent pages you create

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