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.

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

Sample Report Studio Te	mplate	7/1/2014 -	6/30/2015				Pi	repare	ed foi	r: Amy N	liles		
Portfolio Asset Alloca	Performance	e by I	Αссоι	int									
As of Date: 6/30/2015	• Cash • Equity • Fixed Income • Other Total	% 3.71 33.87 5.10 57.32 100.00	Time Period: 7/1/2014 to Individual Transactional Account Joint Miles Account Males Roles RA Total Terroficia Moningster US Merket TR USD H-/Ammingster US Merket TR USD H-/Ammingster US Merket TR USD H-/Ammingster US Merket TR USD H-/Bancleys US Agg Band TR USD	6/30/201 Account Number 94353713 9876 92777064	5 Beginning Merket & Value 146,278,390 476,340,23 631,085,90 1,253,705,06	0.00 0.00 0.00 - - -	0.00 0.00 0.00 - - - -	Interest [0.00 0.00 0.00 - - -	0.00 0.00 0.00 - - -	Ending Market Volue 480.872.06 524.258.972.00 1,630.558.23 - - - -	Money Weighted Return % 228.74 10.06 -0.90 30.06 7.31 22.75 1.86 28.20	Note the highligh content for the header and foote areas on this pag	ıtec r e
Elizabeth Morgan, CFA								Î.	WEAT	Z	RS		

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?

Home Home Home Home Home Home Home Home	Chart Data Table	Format		These two header options are identical, except the bottom one includes a border beneath the header
	Page Header		4	
Enter Text	Enter Text	Enter Text		
Enter Text	Enter Text	Enter Text		
Enter Text	Enter Text	Enter Text	7/10/2015	
Enter Text		Enter Text	Currency: USD	
Insert Image		Enter Text		
Enter Text		Insert Image		These two header options are mirror
Enter Text		Insert Image		one including an image on the left side of
Enter Text		Insert Image		the header, and the bottom option inclu-
		Enter Text		an image on the right side of the neader
Enter Text	Report Date	Account Name		
Client Report Name	Report Currency	Account Number		
Enter Text	Report Date	Client Report Name		
Calculate Fee Type	Benchmark	Account Name		
Enter Text		Client Report Name/ Account Name		
Report Date	Calculate Fee Type	Report Currency		Use this ention to add a blank
Enter Text Re	port Date Client Rep Name	ort Account Name		space you can design from scratch
	Custom Header			

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.

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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.

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		2							rage X of Y Page X of Y Date Report Date Range Rage Name As of Date Insert Image Client Report Name Account Name Account Name Calcular Fee Type Calcular Fee Type	ar y	These data points dynamically updat 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:

- 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**.

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

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	Files of type: Image files(*.ipg,*.png,*.bmp,*.	.gif.*.ico) ▼	Cancel		your logo will be visible
					within the template.
				•	

Version 2.0

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 l 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.



- ► Click here to view the companion video for this document.
- ► Click here to access help topics related to Report Studio.