Morningstar® Office Tip Sheet: Creating Report Template Options

Overview

Now that you've settled on a layout and added the components you want to use in your template, the next step is to add your Report Template settings. Similar to the Report Options dialog box you find with most standard Morningstar reports, Report Template settings allow you to choose the following settings:

- reporting time periods
- benchmarks
- calculation options, such as return methodology and fee type, and
- display options.

What do I need to know about creating my Report Template options?

When running your template in a batch, your reporting time periods and benchmarks will be pulled directly from your batch template and Settings Assignments. (The Settings Assignments are accessed from the menu bar in the main Morningstar Office window by selecting **Tools**…**Settings**…**Settings Assignment**.

Calculation options and display options are retained in your reports when running your template in a batch.

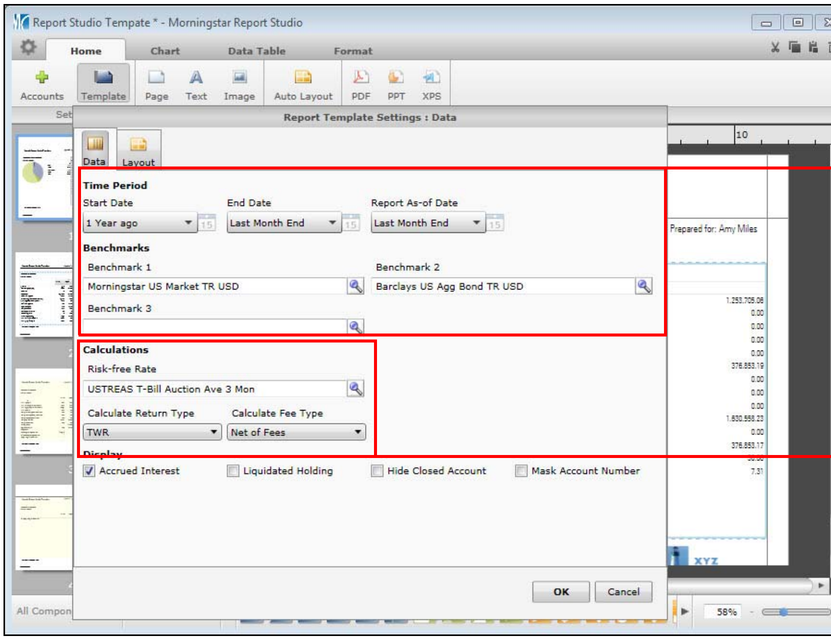
If desired, you can also change your layout settings at the template level. Changing settings at the template level will override any changes you made to the Global Application Settings.

> ☞ Note: Remember, page orientation and display color and markers cannot be changed at the individual template level.

How do I change my template settings?

To access your template settings, do the following:

1. Be sure you are on the **Home** tab.
2. From the toolbar at the top of the Report Studio window, click the **Template** icon.



The settings here are used only in your display template in Report Studio; when run as part of a batch report, the time period and benchmark settings are pulled from your Settings Assignments

These settings are retained when you include a template as part of a batch report

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