

Morningstar® Office Tip Sheet: Customizing Component Data and Appearance

Once your components are in place, you can customize both the data they display as well as their appearance. This is in contrast to Morningstar Standard report elements, which allow for minimal, if any customizations.

Overview

Within Report Studio, you can customize your components using several different tools, including the following:

- ▶ Chart or Data Table toolbar
- ▶ Chart or Data Table Settings menu, and
- ▶ Right-click menu.

To customize a component, click inside the component you want to customize. A blue box appears, signaling that the component is active. From there, use a customization tool (from either the Chart tab toolbar, the right-click menu, or the Settings menu in the bottom-left corner of the Report Studio window) to make data or appearance changes to the component.

When you select a chart, the Chart tab automatically activates

Your right-click options will vary, depending on the chart or table selected

The options for the Settings menu also vary based on the component you chose

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