Morningstar[®] Office Tip Sheet: Saving a Report Studio Report Template

Saving a template automatically archives it under the Saved Reports tab within the Report Studio landing page. From there, you can launch your template to preview a specific client, edit your layout or components, and build a new template based upon an existing template.

Overview

Saving a template also allows you to run the report for multiple clients at once, using the Batch reporting tool.

To save your Report Studio template, do the following:

- 1. Click the **gear** icon in the upper-left corner of the design template, then select **Save as**. The Morningstar Report Studio dialog box opens.
- 2. In the Account Report Name field, enter the name of your template, then click Save.



By saving a report template, it is automatically added to the batch reporting tool. From there, you can run a batch containing only Report Studio templates, or mix -and-match your Report Studio templates with standard report options.

How do I add a saved report template to a batch?

Note: For step-by-step instructions on how to create a batch report, click here.

Start by creating a batch template as you normally would. Select your Report Studio template, then click the right arrow in the center of the screen.

Note: When running a Report Studio template as part of a batch report, your benchmarks will be pulled from the Setting Assignments page (available from the menu bar at the top of the Morningstar Office window under **Tools**...**Settings**...**Settings Assignments**). Your benchmark here may differ from the benchmark you used when creating the template.

| Template Setup Select the type of state or customize by double | ment/report you w -clicking the select | vould like to ted report. | be in this template. Select the da | te range for all reports, | |
|---|---|------------------------------|------------------------------------|---------------------------|--|
| Template Name Standard Reports | Report Studio E | latch | | | |
| 1099 Consolidated 13F Holdings Report (T Account Overview Account Summary Accrued Interest Assets Under Managen Assets Under Managen Callent Position Summary Cellent Position Summa Report Studio Template Custom Client Return; Hatfield Template My Template | XT) | > | Report Studio Tempate | Edit | Use this arrow to include a template in the batch of reports |
| Report Studio Tempate test | | | | | Select one of your templates from this area |
| | | | * Reports can be customized. | | |

By default, the time range of your report template will default to the Report Date Range of your batch template. If you choose to roll your batch report forward for subsequent time periods, your Report Studio report template will also roll forward, based upon the Batch Schedule you set.

| Report Date Range | 1/1/0015 | (Page) | 640422-014 10000-010 | | | |
|-----------------------|----------------------|---------------|----------------------|--------------|------------|-------------------------|
| Start Date | 4/1/2015 | | Roll Start Date | Do Not Roll | ~ | Similar to a standard |
| End Date | 6/30/2015 | - | Roll End Date | Do Not Roll | ~ | Similar to a standard |
| Reports with "as of" | 6/30/2015 | - | Roll As Of Date | Do Not Roll | ~ | will follow these dates |
| Use account inception | on date as start da | te | | | | |
| Re-set all report dat | tes to follow date r | ange of templ | ate | | | |
| · | | | | | | |
| Help | [| Add uploade | ed file in batch | Save Save/Ex | xit Cancel | |

If desired, you can change the reporting dates for just your template by selecting the **template** (to ensure it is highlighted), then clicking the **Edit** button on the Template Setup dialog box. The Report Options dialog box opens. From here, you can change the template dates of your choosing.

| elect the type of statem r customize by double-c | ent/report you v licking the selec | vould like to be in ted report. | this template. Sele | t the date range | for all reports, | | |
|--|---------------------------------------|------------------------------------|----------------------------------|----------------------------|------------------|-------|---|
| emplate Name | Report Studio 1 | emplate | | | | * | |
| tandard Reports 1099 Consolidated 137 Holdings Report (TX Account Overview Account Summary Account Summary Account Summary Account Acc | T) | > < | sport Studio Tempat | 2 | × v Edit | (III) | Click this button to chang the date range of the Report Studio template |
| My Template Morningstar Office Report Options Select report options he | ere | | | | | | |
| Report Date Range Start Date End Date | 4/1/2015 6/30/2015 | · · | Roll Start Date Roll End Date | Do Not Roll Do Not Roll | ~ | | |
| Departs with "ne of" | 6/30/2015 | - | Roll As Of Date | Do Not Roll | ~ | | |

To learn more about using the Application Settings window, do the following:

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

How can I learn more about using these default settings in Report Studio?