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

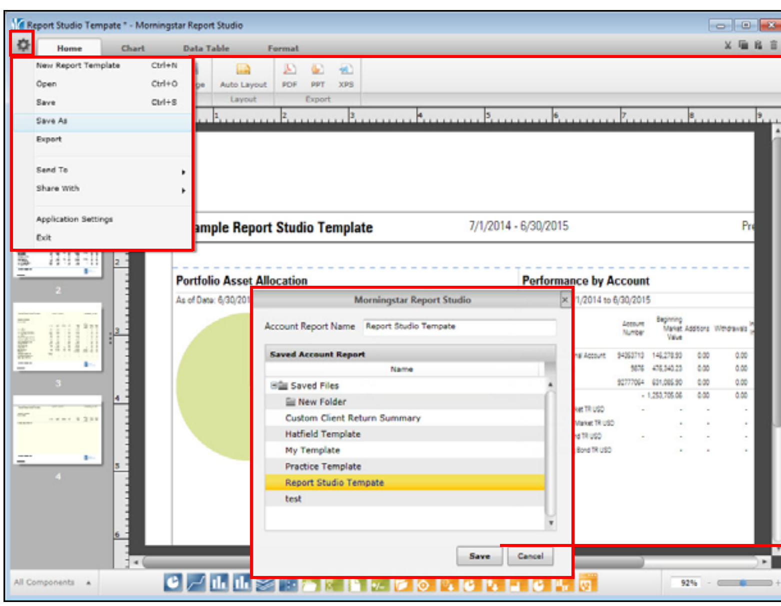
Overview

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.

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**.



Click this icon to save your template

After you name your template, click **Save**

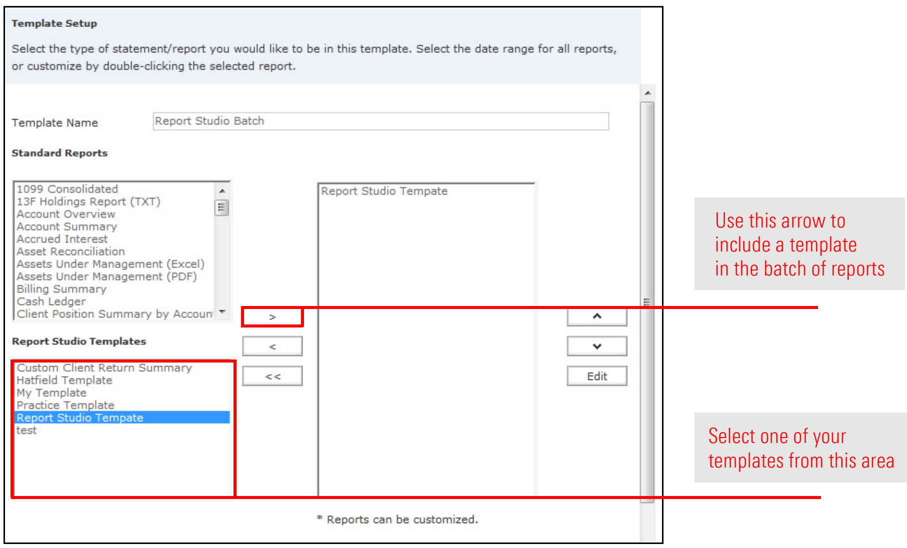
How do I add a saved report template to a batch?

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.

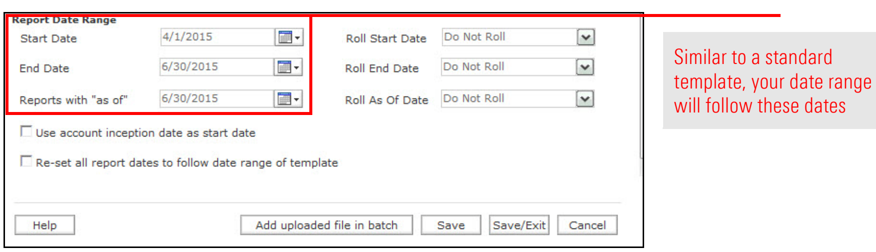
☞ Note: For step-by-step instructions on how to create a batch report, click here.

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

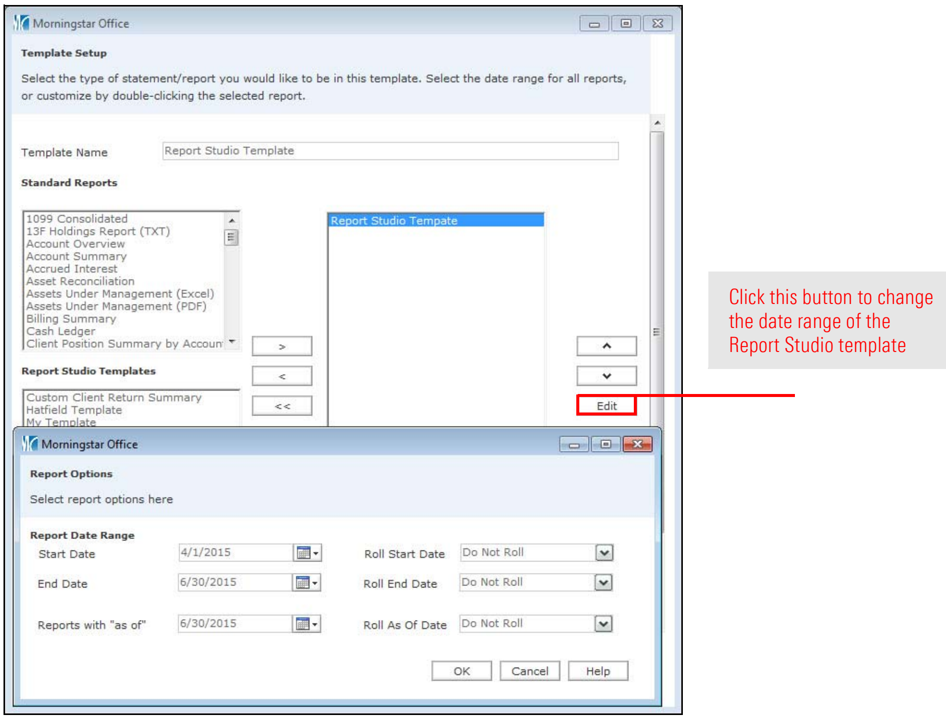
☞ Note: When running a Report Studio template as part of a batch report, your benchmarks will be pulled from the Setting Assignments page (available from the menu bar at the top of the Morningstar Office window under **Tools**…**Settings**…**Settings Assignments**). Your benchmark here may differ from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



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.



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.



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

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.