Configuring and Using the
Client Web Portal in Morningstar Office

This page intentionally left blank

Configuring and Using the
Client Web Portal in Morningstar Office

This document explains how to configure and use the Client Web Portal (CWP) in Morningstar Office. The CWP allows you to post reports and other files to a secure website, which you and your clients can access. If you leverage the batch reporting feature in Morningstar Office, this offers a quick and easy way to quickly put information into your clients' hands.

You also have the option of allowing your clients to post files to the CWP. These could be either items for you to see, or files for their own reference.

The following topics are covered in this manual:

► configuring/designing the CWP
► administering access and use of the CWP, and
► posting content to the CWP.

Overview

The connection to http://www.cwp.morningstar.com uses 128-bit encryption. The connection uses TLS 1.0, and is encrypted using RC4_128 with SHA1 for message authentication, and RSA as the key exchange mechanism. The connection is not compressed and the server does not support the TLS renegotiation extension.

The identity of the website has been verified by Thawte SSL CA.

What kind of security does the CWP offer?

Configuring/Designing the Client Web Portal

The first step in using the CWP is to determine what your clients will see when they log into it. The same window in Morningstar Office that allows you to design the appearance of the CWP and configure its component parts also allows you to perform certain administrative functions. Understanding these key functions is crucial to making the CWP experience an efficient and easy one for you and your clients.

You will learn the following:

▶ how to display your firm's logo on the CWP
▶ how to access the CWP configuration window
▶ how to configure the same CWP for all members in your firm
▶ how each option in the CWP Settings window affects what you and your clients see on the CWP, and
▶ how the settings can be used to share information between you and your clients.

Overview

In Morningstar Office, you can upload your company logo to your user preferences so it appears on any report generated for your clients. As an added bonus, this uploaded logo also appears on your clients' web portals.
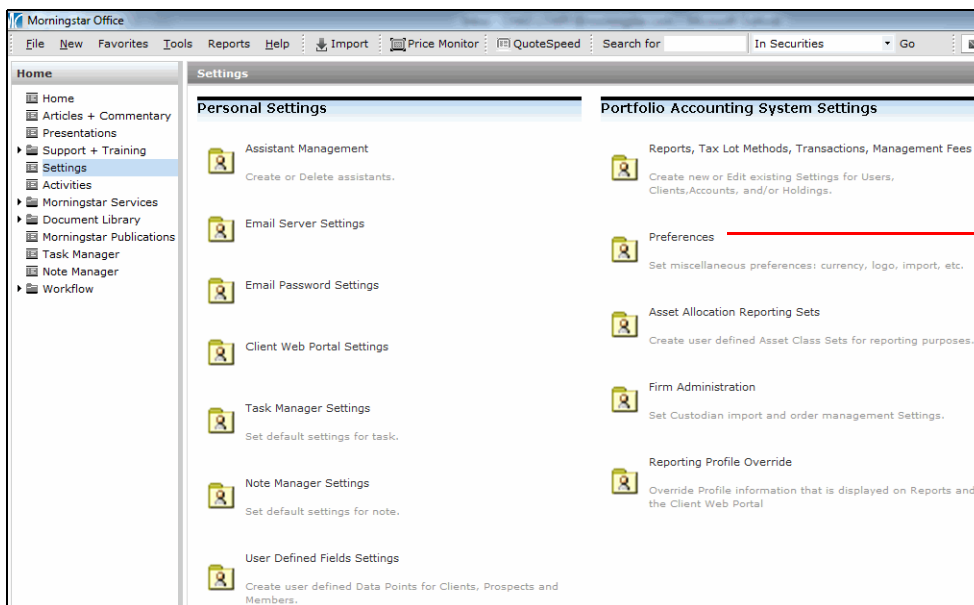
How do I display my firm's logo on the CWP?

Note the following important points about your logo:

► your company logo must be in JPEG or GIF file format
► it cannot exceed 265.5 pixels by 100 pixels (logos larger than these dimensions will be resized down), and
► the company logo file should be saved to a location on your computer.

To display your company's logo on cover pages and the CWP, do the following:

1. On the **Home** tab, select the **Settings** page.
2. From the Settings page, click once on **Preferences**. The Account Setting dialog box opens.

3. In the Account Setting dialog box, click the **magnifying glass** next to the Add Logo to Cover Page field. The Open dialog box opens.

Click here to select your logo
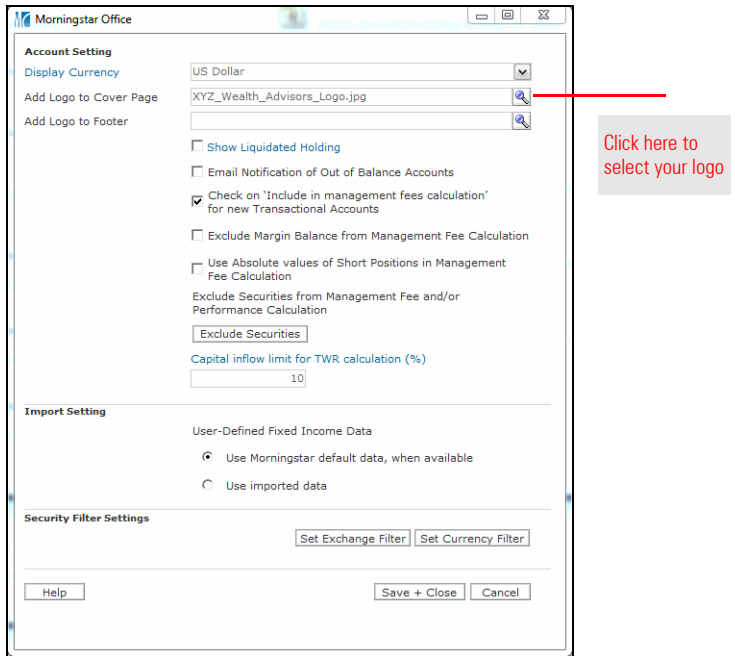
4. Locate the **company logo file** on your computer, then click **Open**.
5. After your logo uploads, click **Save and Close** on the Account Setting dialog box. Your company's logo will now appear in the upper-right corner of your clients' web portals.

Note the inclusion of the logo here
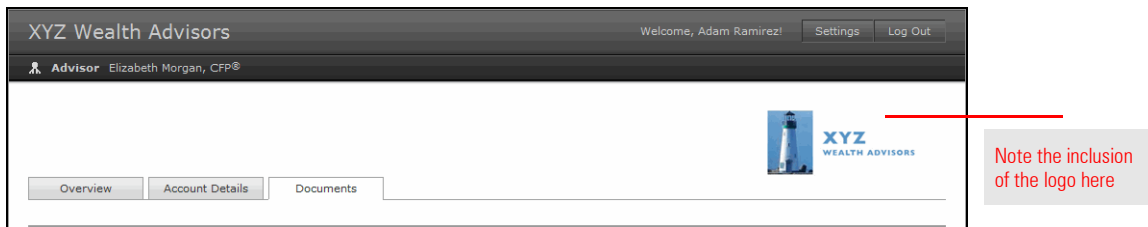
To configure the appearance of the CWP for your clients, do the following:

1. From the **Home** tab, go to the **Settings** page.
2. From the Settings page, click once on **Client Web Portal Settings**. The CWP window opens.

Opening the CWP settings window


Click once on this option from the Settings page
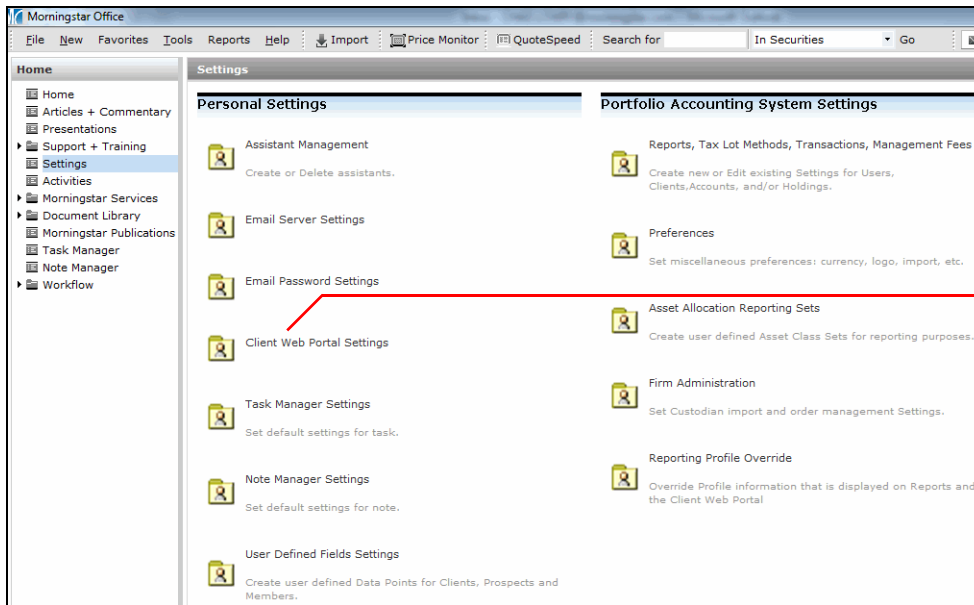
Firm-level settings are used to ensure that every member of your firm has an identical CWP. This can be set by checking the **Use Firm Level Settings** box at the top of the Overview tab, but be forewarned: if this box is checked, any firm member can change the appearance of the CWP for all firm users by subsequently making a change in the CWP Settings window.

How do I establish firm-level settings for the CWP configuration?

To use the same settings for all firm members, check this box
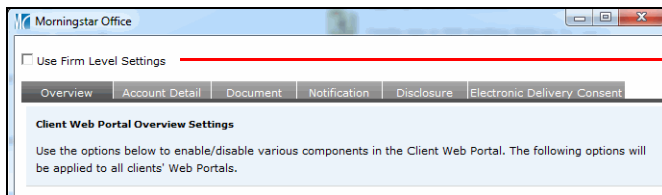
The Overview tab in the CWP shows all of a client's accounts aggregated together. If you want this tab to show on the CWP, check the box labeled **Enable Aggregate Component section on Web Portal**.

Understanding the Overview tab
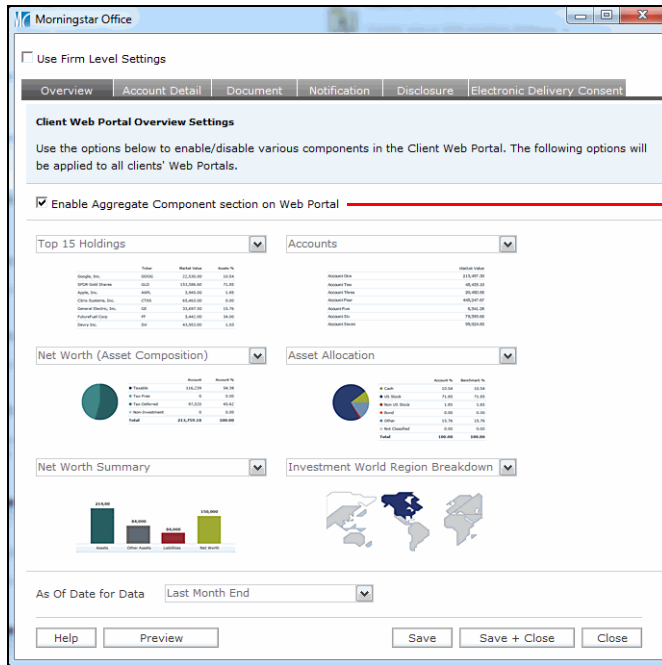
Click here to enable the Overview tab for your clients

The Overview tab allows you to include up to six different sections. You can include which ones you want to show, and set the order in which they appear by selecting the **name** of a section from each drop-down field.

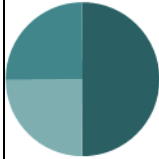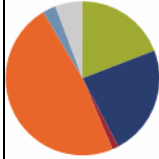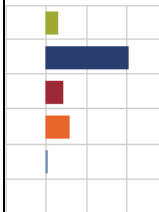☞ Note: To omit a section on the Overview tab, select **Empty** from the drop-down field for an area.

To determine the date for the information shown on the CWP, select one of the following options from the **As of Date for Data** drop-down field at the bottom of the Overview tab:
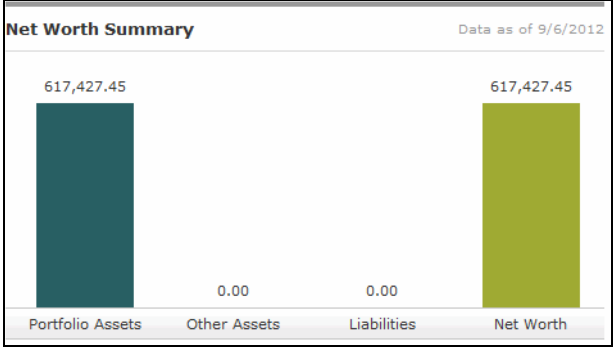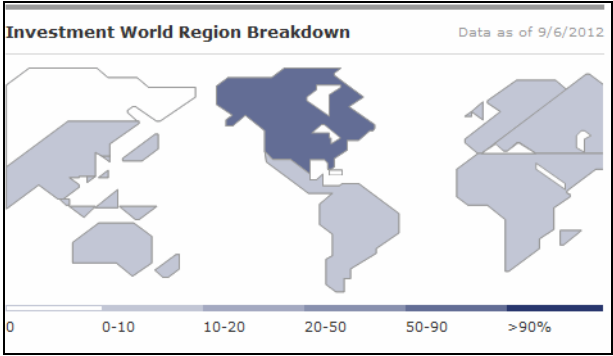
► Last Modified Date
► Last Market Close
► Last Month End
► Last Quarter End, or
► Last Year End.

☞ Note: This selection affects the information on both the Overview and Account Details tabs on the CWP.

The following table provides details on each section available on the Overview tab.

Section	Description
Top 15 Holdings	This area shows the top 15 holdings (based on assets) across all client accounts. The following data points are shown: ▶ Name ▶ Ticker ▶ Market Value ▶ Assets % (the percentage of assets a holding represents among all client holdings) You cannot change which columns are shown here, or the order in which they appear.
Accounts	Shows all of a client's accounts, and the market value of each one.

Section	Description
Net Worth (Asset Composition)	This area presents a breakdown of a client's holdings among the following asset types: ▶ Taxable ▶ Tax-Free ▶ Tax-Deferred, and ▶ Non-Investment. This information is taken directly from the client record; you cannot manually change this information here.
Asset Allocation	This section shows the breakdown of client assets among the following asset classes: ▶ Cash ▶ US Stock ▶ Non US Stock ▶ Bond ▶ Other, and ▶ Not Classified. You can also see the Total assets for a client. If any of the asset classes has a net negative (short) position, a bar chart is shown in lieu of a pie chart.

Section	Description
Net Worth Summary	This area shows the distribution of a client's assets among the following groupings: ▸ Portfolio Assets ▸ Other Assets ▸ Liabilities, and ▸ Net Worth. As with the Net Worth (Asset Composition) section, this information is taken directly from the client record; it cannot be changed manually.
Investment World Region Breakdown	The map shown in this area is shaded to show the weighting of a client's assets around the globe. The darker the area, the heavier the investment in that area. In the CWP, you (or your clients) can mouse over an area of the map to see the percent of a client's assets in that region.

The Account Details tab in the CWP allows you to see information for one account at a time for a client. If you want this tab to show on the CWP, check the box labeled **Enable Account Details Tab**.

Understanding the Account Detail tab

The Account Detail tab allows you to include up to five different sections. You can include which ones you want to show, and set the order in which they appear by selecting the **name** of a section from each drop-down field.

☞ Note: To omit a section on the Account Detail tab, select **Empty** from the drop-down field for an area.

To determine the date for the data shown on the CWP, select one of the following options from the **As of Date for Data** drop-down field at the bottom of the Account Detail tab:
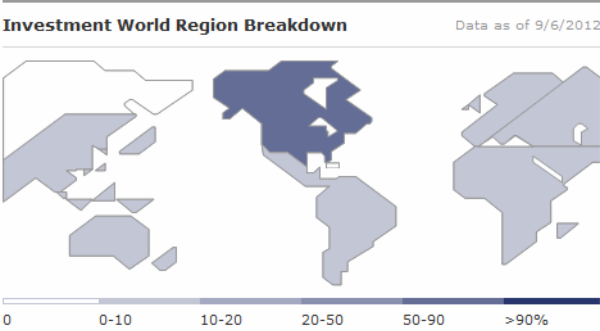
► Last Modified Date
► Last Market Close
► Last Month End
► Last Quarter End, or
► Last Year End.

☞ Note: This selection affects the data on both the Overview and Account Details tabs.

The following table provides details on each section for this tab.

Section	Description
Holdings	This section, if you elect to show it, must appear at the top of the Account Details tab and shows the holdings for an account. Certain data points are shown by default, but you can configure these (among the options available) by clicking the **Select Columns** link on the Account Detail tab in the CWP Settings window. Note the following about selecting columns: ► you can include up to 50 columns, and ► while you cannot set the sequence in which the columns will appear on the CWP in the Select Columns dialog box, your clients can set the columns' arrangement simply by **dragging-and-dropping** the columns in the order they would like them to appear.

Section	Description
Investment Activity Graph	This chart shows the return of an account over the past 10 years. The dark blue horizontal line represents the client's investment in the account. The light blue area represents the change in the account's value over time. If a certain security did not exist at some point in the prior 10 years, it is removed from the return calculation, and the other securities in the account are weighted proportionately.
Asset Allocation	This section shows the breakdown of the client's assets among the following asset classes: ▶ Cash ▶ US Stock ▶ Non US Stock ▶ Bond ▶ Other, and ▶ Not Classified. You can also see the Total assets for a client. If any of the asset classes has a net negative (short) position, a bar chart is shown in lieu of a pie chart.

Section	Description
Investment World Region Breakdown	The map shown in this area is shaded to show the weighting of a client's assets around the globe. The darker the area, the heavier the investment in that area. In the CWP, you (or your clients) can mouse over an area of the map to see the percent of a client's assets in that region.
Transactions	This area shows the transactions for an account. The following information is shown: ► the month the transaction took place ► the Type of transaction ► the number of Units exchanged, and ► the Value per unit.

The Document tab allows you to do the following for the CWP:

► decide whether clients can upload files to the CWP
► decide whether client files should be automatically posted to the CWP when they are uploaded
► determine which types of files clients can upload to the CWP
► select a folder for client files to be stored in when they are uploaded to the CWP (you must have already created this folder on the Reports tab in Morningstar Office), and
► decide whether the report folders you create in Morningstar Office (for housing the reports you generate) should be displayed on the CWP.

First, decide whether you want to allow clients to post their own files to the CWP. This allows them to both share files with you, and use the CWP as a single place of reference for investment-related items. To allow clients to post documents to the CWP, check the box labeled **Allow Clients to upload documents via the Web Portal**.

☞ Note: When a client submits a new file to the CWP, you will receive an email alerting you to this update.

<div style="text-align: right; font-weight: bold;">Understanding the Document tab</div>
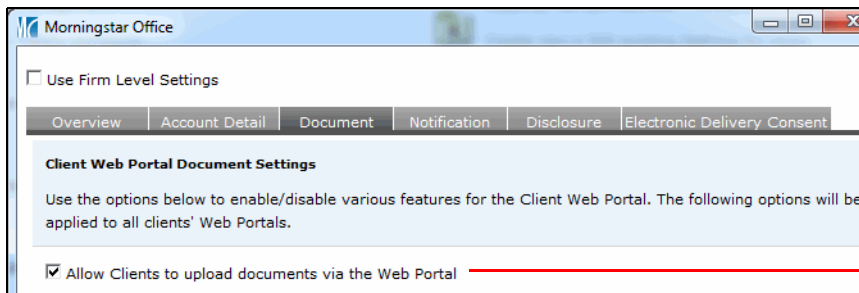
Check this box to allow clients to upload files for the CWP

Rather than have every client file posted immediately, you have the option of reviewing this material. This rule must apply to all users, and can also be used to prevent sensitive material from inadvertently being posted by a client. To allow client files to be automatically posted to the CWP, check the box labeled **Auto post uploaded documents to the Client's Web Portal for viewing by the Client after upload**. If you do not want files to be automatically posted, leave this box unchecked.
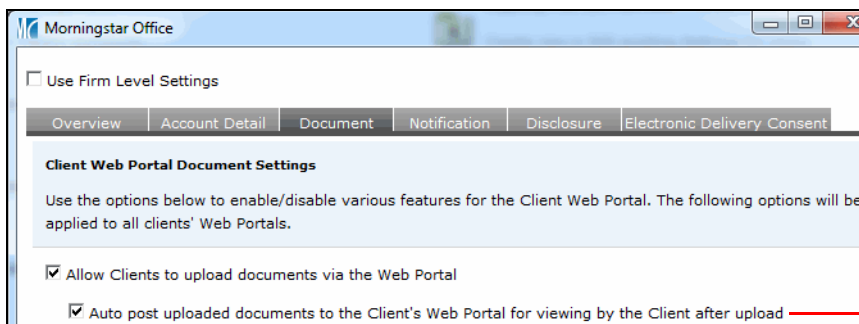
Click here only if you want the files your clients upload to immediately be posted to the CWP

Next, you must decide which types of files to allow clients to upload. Note that a distinction is made between .xls and .xlsx, and .doc and .docx files. This is because more recent versions of Microsoft Excel and Word save files with an .xlsx and .docx extension, respectively.

When a client uploads a file to the CWP, a record is created in Morningstar Office. You can see those records on the Reports tab, on the Usage Reports page. Further, you can create a sub-folder on the Reports page to house all of the files your clients upload to the CWP.

If you have already created such a folder, you can select it on the Document tab from the **Select folder where uploaded documents will be saved:** drop-down field.

If you have not already created this folder, do the following:

1. From the **Reports** tab, select the **Reports** folder.
2. Right-click the Reports folder and select **New Folder**. The New Folder dialog box opens.
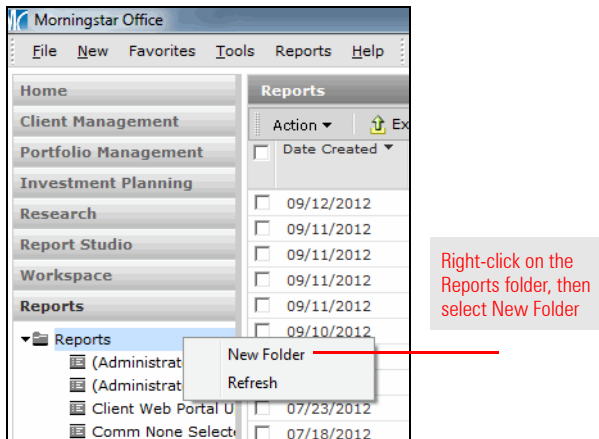
3. In the New Folder dialog box, type a **Name** for the folder to which your clients' uploaded documents will go.
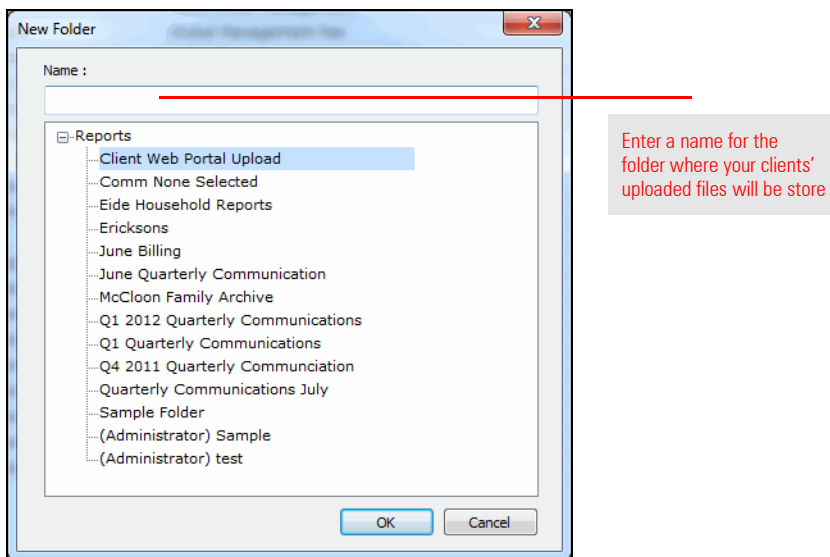
4. Click **OK**.

☞ Note: Be sure to select this folder from the Document tab in the Client Web Portal Settings window.

Finally, not only can you designate a folder to which client submissions will be posted, you can also choose to have the folders you've created be posted to the CWP. For instance, if you create a separate folder for each set of quarterly reports you create, you can display those folders on your clients' CWP, to make it easier for them to find the files you post.

To display these folders, simply check the box at the bottom of the Document tab labeled **Display report folders on Web Portal**.

The Notification tab allows you to enter a default message in the email your clients receive whenever you post a file to their CWP.

Understanding the Notification tab

Note the following important points about this tab:

► Your message can be up to 600 characters. Your name and your firm's name will be included by default, so you don't need to include those in the message you write. However, it is recommended that you include a link to the CWP (https://cwp.morningstar.com/) in the message.

► You can use a default signature as well. Click the icon to the right of the **Use default email signature for automatic notification e-mails** to configure your signature.

► You can disable notification emails for when you post reports, as well as the email your clients receive when you first enable the CWP for them. You can also disable the notification you receive when a client uploads a file to the CWP. Of course, if you disable this setting, you will need to be diligent about monitoring the Reports page on the Reports tab to see when these files are uploaded.

The Disclosure tab is optional, but it allows you to create a message (of up to 4,000 characters) in the footer area on the CWP. You can also decide whether to show the Morningstar logo in the footer as well.

The following are examples of what you could type in the footer area of the CWP:

► This is a secure site.
► Files are uploaded on a quarterly basis.
► For questions regarding the content of these reports, please call aaa-ppp-xxxx (your firm's phone number).

Understanding the Disclosure tab

The Electronic Delivery Consent tab is also optional. It allows you to force clients to accept a consent agreement before viewing the CWP, even if they have previously logged into it.

If used, this tab will present an message to clients the first time they login to the CWP after you have either enabled this option, or posted a new version of the consent.

Note the following important points about writing a consent script:

► You can create multiple scripts, but only the latest version will show.
► You cannot edit or delete a previous version of the script.

To create a new version of the Electronic Disclosure Consent page, do the following:

1. On the Electronic Delivery Consent tab, click **Add New Version**.
2. In the text area to the right, type your **message**.

   ☞ Note: If you realize you do not need this content, click the **Discard New Version** button.

Understanding the Electronic Delivery Consent tab
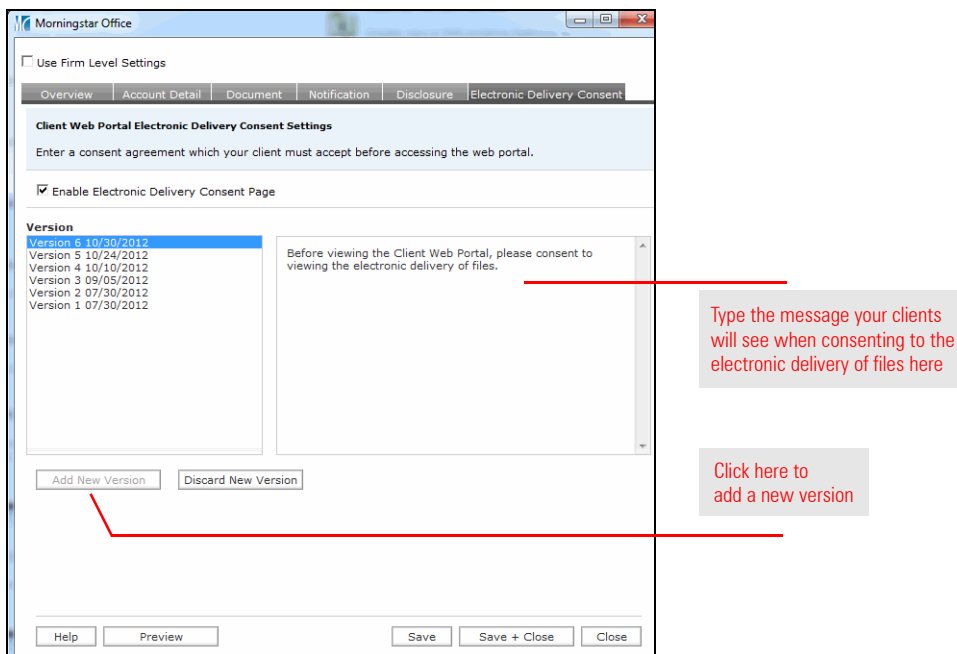
3. Click **Save**.

Administering the Client Web Portal

After you have configured the features and appearance of the CWP, you can address the administrative functions of the tool, such as granting access to the CWP for each client. You must grant access to the CWP for each client individually; it is not enabled by default. Before granting access to the CWP for a client, you should consider the following questions:

▶ What email address should I use for a client to log into the CWP?
▶ What password will the client use to log into the CWP?
▶ What do I do if I accidentally enter the wrong email address for a client?

This section explains the following:

▶ how to choose an email address for clients when they log into the CWP
▶ how to set other email addresses to receive a notification when content is posted to the CWP
▶ how to designate someone to receive an email when I post content for a group to the CWP
▶ how to disable the automatic email a client receives after they are set up with access to the CWP
▶ how to change the email address for clients after they are registered for the CWP
▶ how to set a client's password for the CWP
▶ what information your clients' email notification will contain if you require them to set their own password?
▶ what information your clients' email notification will contain if you use the Morningstar default password
▶ what information your clients' email notification will contain if you set their password
▶ how to grant access to the Client Web Portal
▶ how to reset a client's password, and
▶ how to disable access to the Client Web Portal.

Overview

When setting up a client for access to the CWP, you will enter an email address for the client to use to log in to the CWP. In addition to being the login for the CWP, this email address will also automatically receive notifications when you post items to the CWP.

☞ Note: if the client has a different email address in the Client Profile->General area, that email address, and not the CWP email login, will receive the CWP notifications.

What email address should I use for clients when they log into the CWP?

You can also enter additional email addresses for clients or related parties to receive a notification when a new item is posted to the CWP; be sure to separate these addresses with either a comma or a semicolon.

☞ Note: these email addresses are only CC'd on the notifications; they cannot be used to log in to the CWP.

Can other email addresses receive a notification when I post content to the CWP?

If you have a group record, you can designate a Reporting Client to be the recipient of the email that is sent when reports are posted for that group to the CWP. This designated client will then see the reports for the group on the CWP, in addition to other content you have posted for that client. This is a handy trick to use when you want to ensure someone who is not the owner of an account can still see reports for that account.

For example, you might have separate client records for a husband and wife who jointly own a trust. If the account for the trust is under the husband's client record, you can add the account to a group, then designate the wife as the Reporting Client for the group. This way, the husband will be able to see reports for the account because it is associated with him, and the wife will be able to see reports for the account, because she is the designated Reporting Client for the group. Keep in mind, though, you must generate and post reports for the account at both the client (husband) and again at the group (wife) level in order for both of them to see the file. You will also have to post it twice to the Client Web Portal.

To establish a Reporting Client for a group, do the following:

1. From the **Portfolio Management** tab, select the **Groups** page.

Click once to select the Groups page
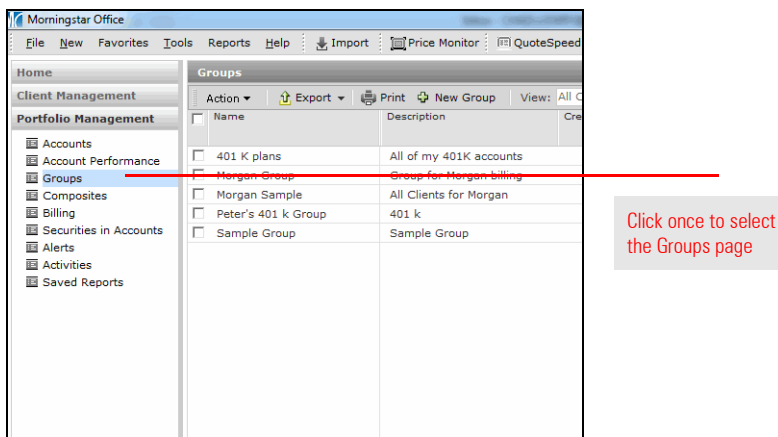
2. **Double-click** the **group** you want to work with. The Groups window opens.
3. Select the **Profile** page.

How do I designate someone to receive an email when I post content for a group?

4. In the Reporting Client field towards the bottom of the Profile area, type the **name** of the client you want to designate for this group.
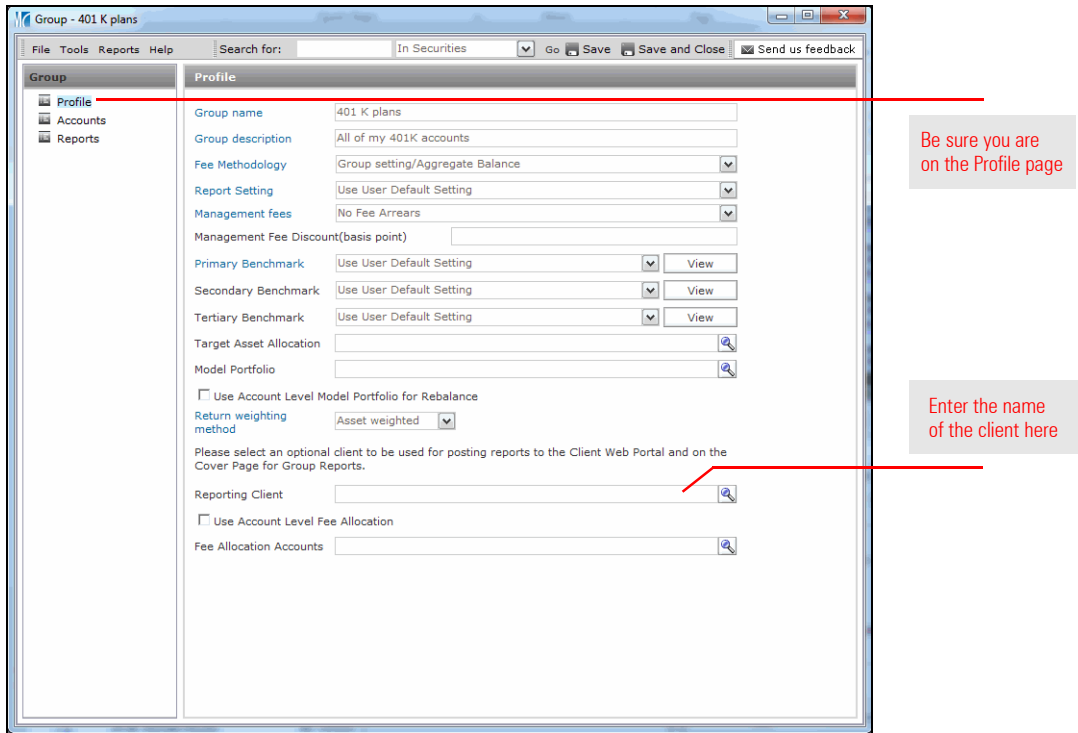
5. At the top of the window, click **Save and Close**.

When clients are set up with access to the CWP, they receive an email notifying them of this; the email includes a link to the CWP, and instructions on how to login. If you prefer to send your own message, you can disable this automatic email.

To disable the automatic email that is sent to clients alerting them that their web portal has been setup, do the following:
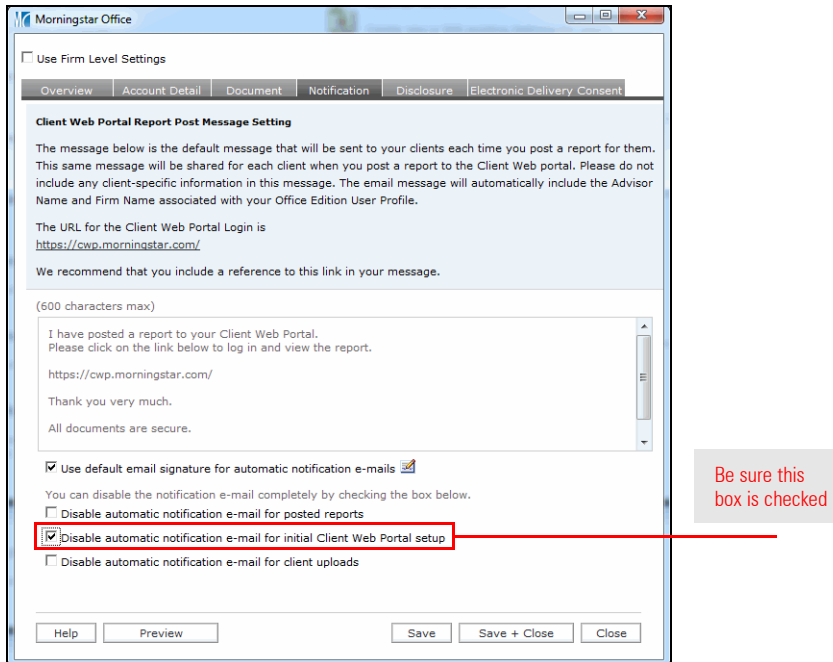
1. From the **Home** tab, select the **Settings** page.
2. On the Settings page, select the **Client Web Portal Settings**. The Client Web Portal window opens.

How do I disable the automatic email a client receives after they are set up with access to the CWP?

Click once to select this option
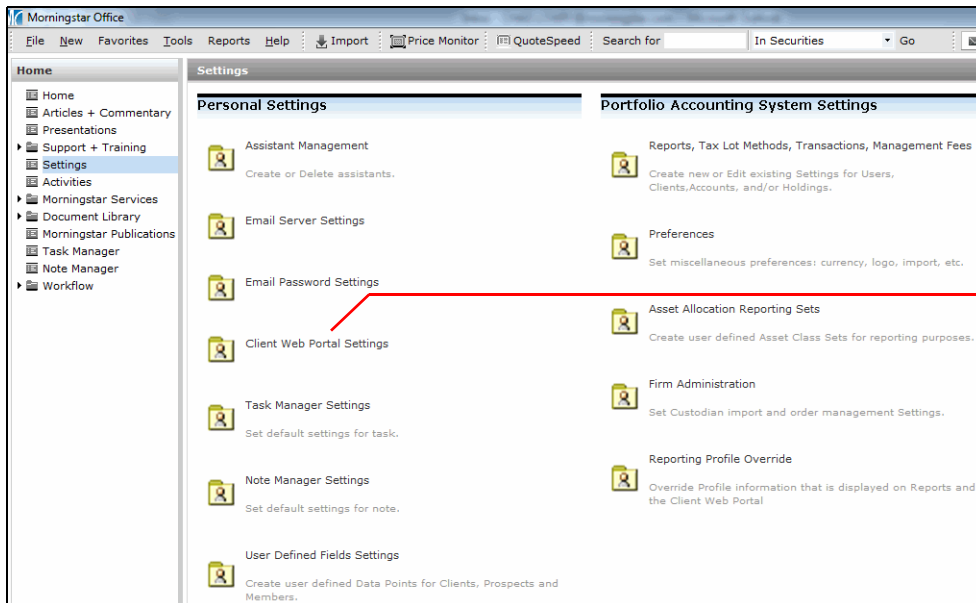
3. Select the **Notification** tab.

4. Check the box labeled **Disable automatic notification e-mail for initial Client Web Portal setup**.

Be sure this box is checked

5. Click **Save + Close**.

After you submit the CWP setup for a client in Morningstar Office, you cannot change the email address a client uses to login to the CWP. If a client wants to change the email address used to log into the CWP, the client needs to login into the CWP and use the **Settings** button.

When the client changes the email address entered there, it automatically pulls through to Morningstar Office, and you will see it reflected on the Client Web Portal set up page on the Client window.

Can I change the email address for clients after I register them for the CWP?

When you grant a client access to the CWP, you need to decide how to set the password for the client's access to the website.

Note the following options for this feature:

► you can require the client to set his/her own password
► you can enter a custom password for the client.

    ☞ Note: If you opt for either the first or third option, note that the CWP password is case sensitive and must meet the following criteria:

       ► it must be 8 to 16 characters long
       ► it must contain numbers
       ► it is allowed to contain the following symbols: !@#$%^*?_~
       ► it must contain lower and uppercase letters
       ► it cannot contain sequential character strings like "abcd"
       ► it cannot contain part of you login e-mail address, and
       ► it cannot contain the word "Morningstar."

How do I set a client's password for the CWP?

If you choose to have clients set their own password, they will receive an email notifying them the CWP has been set up for their use. Unless you have requested an email mask, this email will come from your @mstar.com email address. If they do not already have a Morningstar login (via Morningstar.com), they will also receive a second email with a link that will allow them to create an account with a universal password they can use with the CWP. See page 23 for more details on these emails.

If you choose to create a custom password for clients, clients will receive a single email, letting them know their CWP has been set up and they can use the Morningstar default password (or the custom password you created). You should also strongly encourage them to change their password after they login for the first time. They can do this via the Settings button on the CWP. See page 24 for more information on these password options.

After being set up with the CPWP, the email notification(s) your client receives will differ, depending on the password option you choose for the client.

☞ Note: For a description of the different password options available to you, see **How do I set a client's password for the CWP?** on page 22.

When you choose to require clients to choose their own password, your clients will simultaneously receive two emails. The first email directs each client to do the following:

► If your client already subscribes to a Morningstar product (such as Morningstar.com), they will be directed to click on the link embedded in the email. Your client should log into their CWP using their existing email address and password on record with Morningstar. Your client can disregard the second email.
► If your client has never subscribed to a Morningstar product, your client is informed that they will receive a second email instructing them how to create a password.

The second email directs your clients to click on the embedded link in the email, to create a new Morningstar password.

What information will the emails to my clients contain if I require clients to set their own password?

This is a sample of the first email your clients receive if they have to set their own password
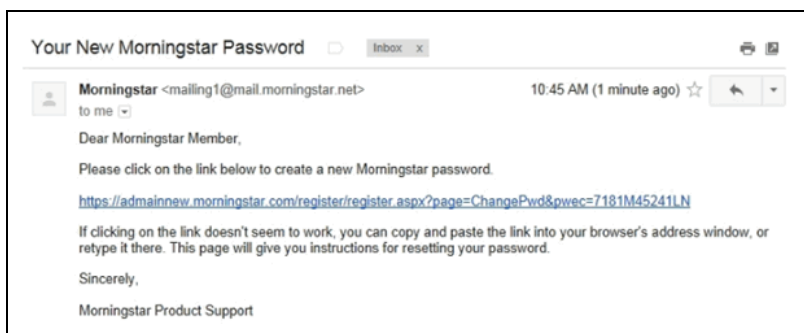
This is a sample of the second email your clients receive if they have to set their own password

Your clients are directed to the following web page, where they can enter and confirm a new password.

After clicking Continue, clients are prompted to enter the CWP. From there, they will be directed to the CWP Login screen.

If you choose to create a custom password for your clients, they will receive one email. The email reveals the password you chose for your client, and directs them to click on the link embedded in the email, to access the Client Web Portal Log in screen.

What information will the email to my clients contain if I set their password?
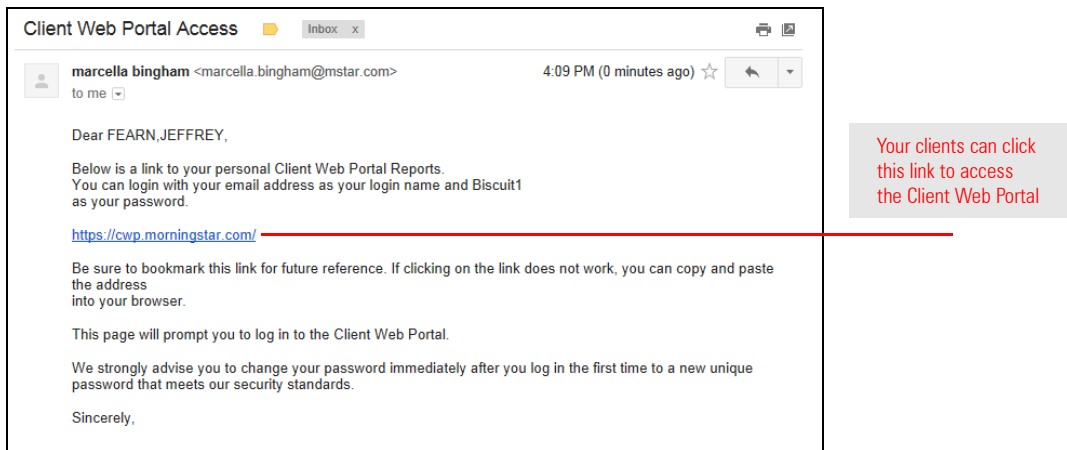
Your client will log into the CWP using the password provided in the email.

Access to the CWP can be granted for only one client at a time. To give a client access to the CWP, do the following:

1. In Morningstar Office's left navigation pane, click the **Client Management** tab, then be sure you are on the **Clients** page.
2. Double-click on the **client** you want to grant CWP access to. The Client window opens and you will be on the Accounts page.
3. In the Client window, click the **Client Web Portal Setup** page.
4. Select the **Enabled** option button.

Make sure this option button is selected

5. In the Client E-mail Address field, enter the client's **email address**.
6. In the Confirm Client E-mail Address field, re-type the client's **email address**.

☞ Note: Be sure this is the correct email address for the client before you click Submit. You will not be able to change this email address once you submit it. If you mistakenly submit the wrong email address, disable that email address and contact Customer Support to reset the login.Select an option under the **Set Client Password** area. Note the following options for this feature:

► you can require the client to set his/her own password, or
► you can enter a custom password for the client.

☞ Note: If you opt for either the first or third option, note that the CWP password is case sensitive and must meet the following criteria:

► it must be 8 to 16 characters long
► it must contain numbers
► it is allowed to contain the following symbols: !@#$%^*?_~
► it must contain lower and uppercase letters
► it cannot contain sequential character strings like "abcd"
► it cannot contain part of you login e-mail address, and
► it cannot contain the word "Morningstar."

7. Optionally, in the Client CC: List area, enter and confirm **additional email addresses** for related parties to also be able to receive a notification when content is posted to this client's CWP.

You will have to retype the client's email address here

After confirming all details, click this button

8. Click **Apply Changes**. The client (and any additional email addresses you entered) will be sent a link to the CWP.

To reset your client's password to the CWP, do the following:

How do I reset a client's password?

1. In the left navigation pane, click **Client Management**, then be sure you are on the **Clients** page.
2. Double-click on the **client** you want to change the password for. The Client window opens and you will be on the Accounts page.
3. In the Client window, click **Client Web Portal Setup**.
4. From the Client Web Portal Setup page, click **Reset Password.**

Click here to reset the password for a client

5. A box stating that your client will receive an email notification will launch. Click **Yes**.
6. Your client will receive an email notification directing them to click on the embedded link to change their password.

Dear Morningstar Member,

Please click on the link below to create a new Morningstar password.

https://admainnew.morningstar.com/register/register.aspx?
page=ChangePwd&pwec=6LM6N05146L9

If clicking on the link doesn't seem to work, you can copy and paste the link into your browser's address window, or retype it there. This page will give you instructions for resetting your password.

Sincerely,

Morningstar Product Support

This is a sample of the email a client receives to change their password

7. Your client will be directed to the following Web page, where they can enter and confirm a new password.

Create New Password

E-mail Address

Sample@sample.com

New Password

Password Requirements ❓   Weak

Verify Password

Continue

See the note on page 22 for the parameters a password must meet

8. After your Client clicks **Continue**, they will be prompted to enter the Client Web Portal. From there, they will be directed to the Client Web Portal Login screen.

Once you establish an email address for a client, you can both disable and re-enable their access to the CWP, but if a client wants to change their CWP login (email or password), they need to do this by clicking the **Settings** button within the CWP.

☞ Note: You cannot change the email address for a client once it is submitted. If you mistakenly submit the wrong email address, you should immediately click the **Disable** button to disable access, remove any reports from the CWP for that client, and contact Customer Support (866-215-2503) to reset the login for that client.

To disable a client's access to the Client Web Portal, do the following:

1. In the left navigation pane, click the **Client Management** tab, then be sure you are on the **Clients** page.
2. Double-click on the **client** for whom you want to disable CWP access. The Client window opens and you will be on the Accounts page.
3. In the Client window, select the **Client Web Portal Setup** page.
4. Select the **Disabled** option button.

5. Click **Apply Changes**. A confirmation message appears, asking if you are sure want to disable the client's access.
6. Click **OK**. Be sure to contact Customer Support (866-215-2503) to have the login reset for the customer.

Posting Content to the Client Web Portal

Once you have configured the CWP, and granted clients access to it, you can undertake the process of posting content to the website.

Overview

> ☞ Note: In addition to reports from Morningstar Office, you can post other files to the CWP as well, such as a newsletter.

This section explains how to post content to the CWP from the following areas:

► Reports tab
► Client Management tab
► Portfolio Management tab, and
► the Tools menu.

You will also learn how to remove content from the CWP, and monitor your clients' usage of the CWP. You can see whether they have posted content to the CWP, as well as whether they have logged in and which tabs in the CWP they have visited.

You can post reports to the CWP for multiple clients at once. To post a report to the CWP from the Reports tab, do the following:

How do I post reports to the CWP from the Reports tab?

1. In the left navigation pane, click the **Reports** tab. The Reports area opens.
2. If necessary, navigate to the **folder** where the reports you want to post are saved.
3. Check the **box(es)** next to the report(s) you want to post.
4. From the **Action** menu, select **Post to Web Portal**.

After selecting the reports you want to post to the CWP, click this option
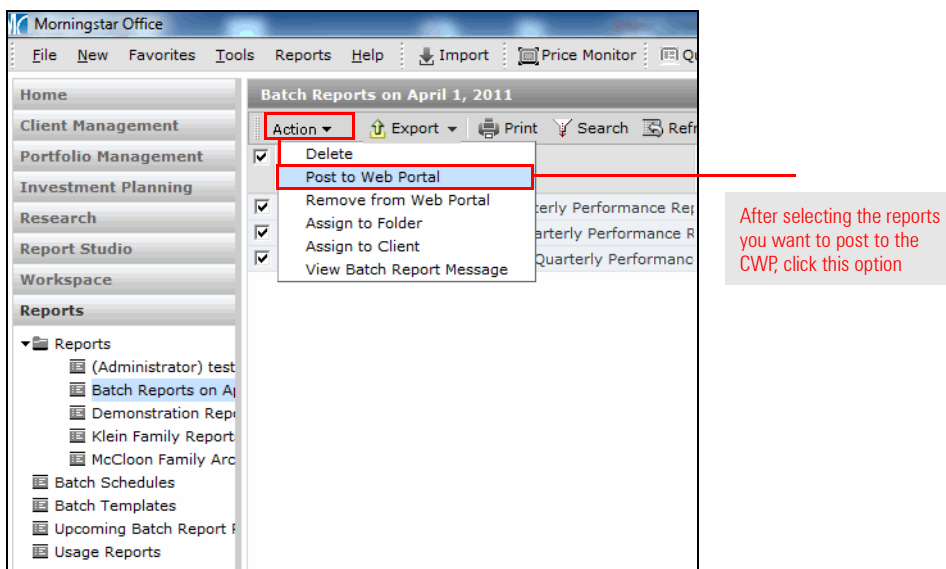
5. A confirmation message appears. Click **OK**.
6. Click **OK** when the second confirmation message appears.

To post a report to the CWP from the Client Management tab, do the following:

1. In the left navigation pane, click **Client Management** tab, then go to the **Saved Reports** page.
2. Check the **box(es)** next to the report(s) you want to post.
3. From the **Action** menu, select **Post to Web Portal**.

After selecting the reports you want to post to the CWP, click this option

4. A confirmation message appears. Click **OK**.
5. Click **OK** when the second confirmation message appears.

How do I post reports to the CWP from the Client Management tab?

To post a report to the CWP from the Portfolio Management tab, do the following:

1. In the left navigation pane, click the **Portfolio Management** tab, then go to the **Saved Reports** page.
2. Check the **box(es)** next to the report(s) you want to post.
3. From the **Action** menu, select **Post to Web Portal**.

After selecting the reports you want to post to the CWP, click this option

4. A confirmation message appears. Click **OK**.
5. Click **OK** when the second confirmation message appears.

How do I post reports to the CWP from the Portfolio Management tab?

You can post files (such as a newsletter in PDF format, or an Excel spreadsheet) from outside of Morningstar Office to the CWP as well. Posting these files consists of the following steps:

How do I post a file from outside of Morningstar Office to the CWP?

1. Upload the file to Morningstar Office.
2. Assign the file to a client (or clients).
3. Post the file to the CWP.

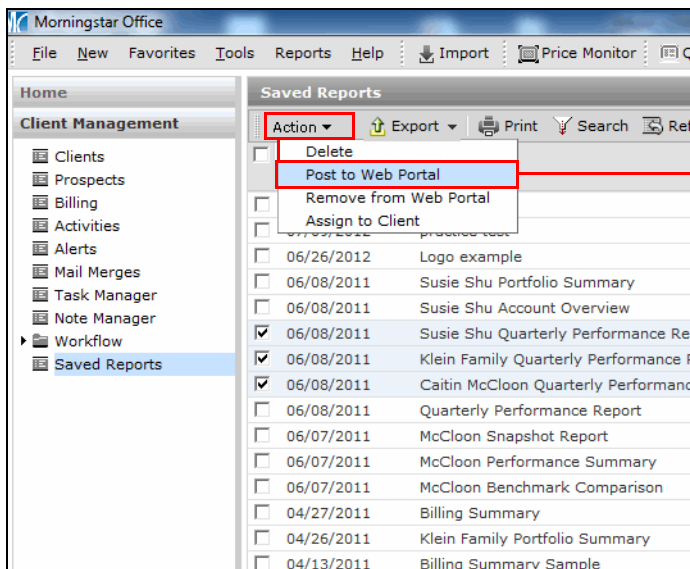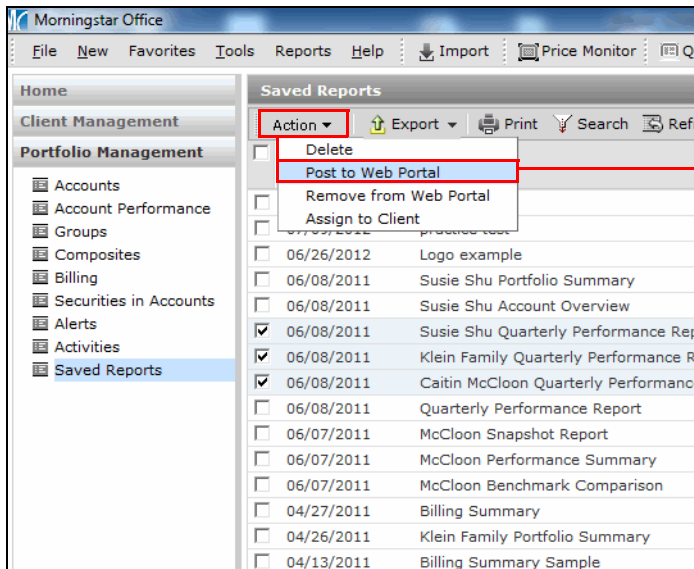☞ Note: Alternately, you can also elect to save the file to a folder before posting it to the CWP.

To post an external file to the CWP, do the following:

1. In the left navigation pane, click the **Reports** tab, and select the **Reports** page.

   ☞ Note: You can also do this procedure from the **Saved Reports** page of the Client Management, Portfolio Management, Investment Planning, Research or Workspace tabs. Uploading the document from the Reports tab, though, allows you to assign it to a folder you use for your CWP.

2. Click the **Upload Document** icon (above the spreadsheet area). The Open dialog box
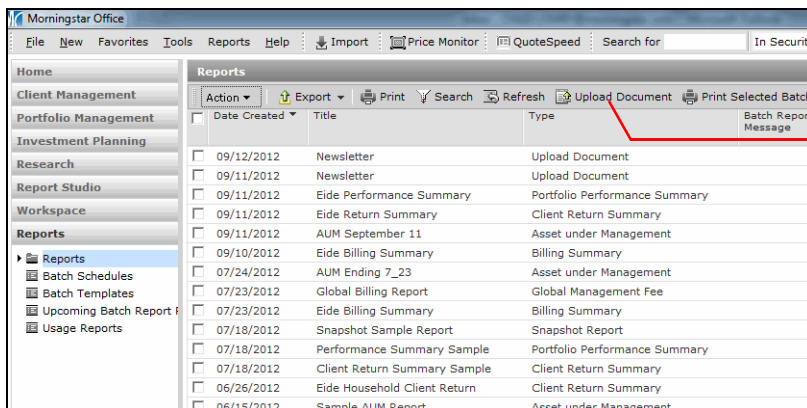
Click this icon to upload an external file

   opens.

3. Select the **file** you want to upload to the CWP, then click **Open**. The file now appears at the top of the Reports page.
4. Check the **box** to the left of the file to select it.
5. From the **Action** menu, select **Assign to Client**. The Find Clients dialog box opens.
6. Click **Go** to find the **client(s)** to which you want to assign the file.
7. After adding the client(s) to the Selected Records area, click **OK** to close the Find Clients dialog box.
8. From the **Action** menu, select **Post to Web Portal**.
9. A confirmation message appears. Click **OK**.
10. Click **OK** when the second confirmation message appears.

If you have a number of files outside of Morningstar Office that you'd like to upload at once, you can use the Batch Upload tool. The Batch Upload tool allows you to upload not only multiple outside files at once, but also to post them to multiple clients as well.

How do I post a batch of files to the CWP?

To upload a batch of documents to the CWP, do the following:

1. From the menu at the top of the Morningstar Office screen, select **Tools**…**Batch Document Upload**. A dialog box opens.

From the Tools menu, select this option
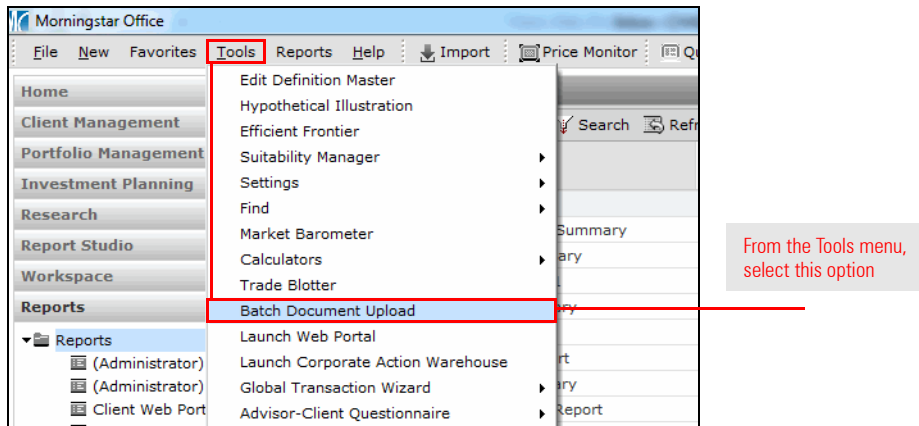
2. At the top of the dialog box, click the **Add Files** icon. The Choose Files to Upload dialog box opens.

Click this icon to add the files you want o post
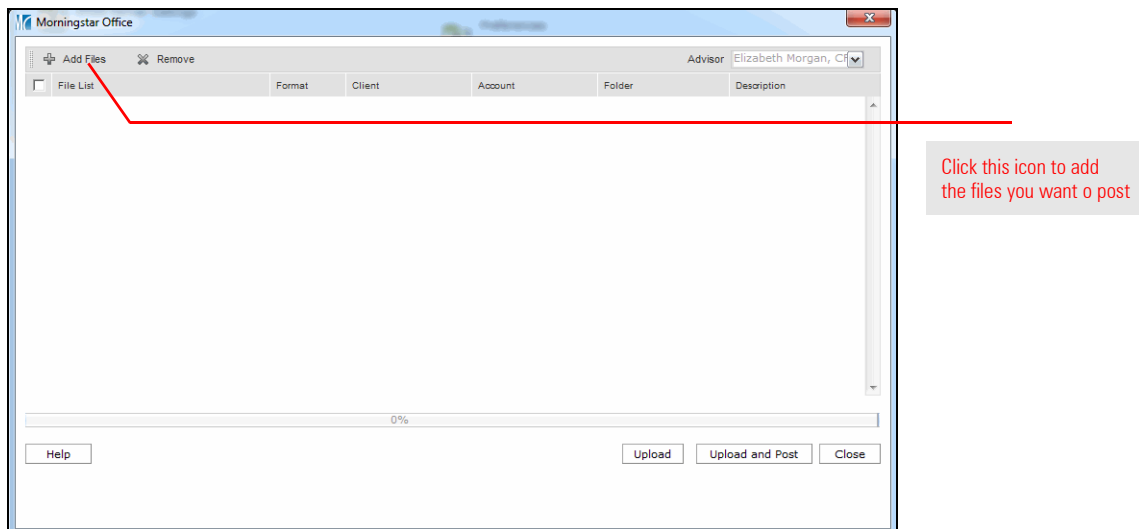
3. Select a **file** you want to upload.
4. Repeat steps 2-3 for each file you want to upload.
5. In the Client column, select the **client(s)** for whom you would like each file to appear on the CWP.
6. In the Account column, select the **account** you would like to associate with this file.

   ☞ Note: If you selected multiple clients in step 5, you cannot select an account to associate the file to.

7. In the Folder column, select the **folder** to which each file will be assigned.
8. When you have loaded all files and made all assignments, click **Upload and Post**.
9. Click **Close**.

Occasionally, you might need to remove content from the CWP. For instance, perhaps you want to remove reports older than 12 months. You can do this by selecting either individual records, or multiple records at once.

**How do I remove content from the CWP?**

To remove content from the CWP, do the following:

1. In the left navigation pane, click the **Reports** tab, and select the **Reports** page.

   ☞ Note: You can also do this procedure from the **Saved Reports** page of the Client Management, Portfolio Management, Investment Planning, Research or Workspace tabs.

2. If necessary, select the **folder** which houses the item(s) you want to remove.
3. Check the **box(es)** next to the report(s) you want to remove.
4. From the **Action** menu, select **Remove from Web Portal**. The item is removed from the CWP. The next time your client(s) logs in, the item(s) will no longer be seen.

Select this option from the Action menu
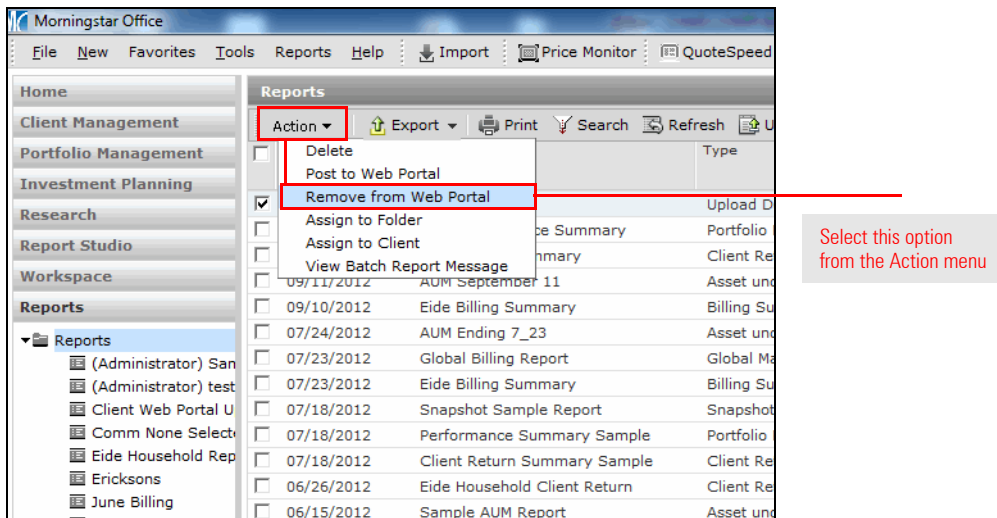
Now that you have configured the CWP, granted clients access to it and posted reports for them, you can monitor whether they have done the following:

► posted files for you to see
► logged into the CWP, and
► accessed certain tabs in the CWP.

To monitor your clients' usage of the CWP, do the following:

1. In the left navigation pane, click the **Reports** tab, then go to the **Usage Reports** page.

Double-click this option from the Usage Reports page
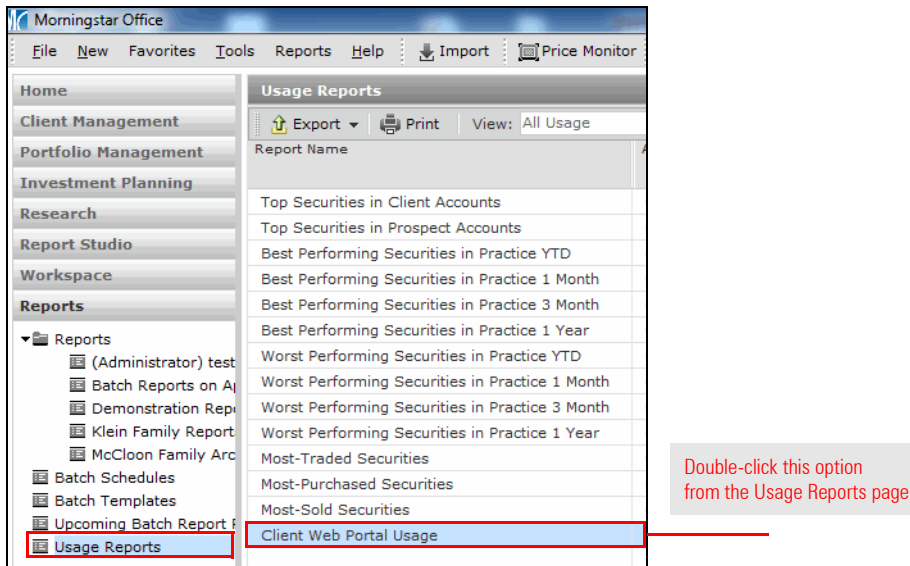
2. Double-click **Client Web Portal Usage**. The Client Web Portal Usage window opens. Any files your clients have uploaded will appear here. You can also use this window to monitor your clients' login frequency to the CWP, and which tabs they have visited.
3. If a client has uploaded a document, **double-click** the row. The Client window opens.
4. Select the **Reports** page from the Clients window.
5. **Double-click** the **file** you want to see. It opens in a new window.
6. To post the file to the CWP, select the **box** next to the row on the Reports page in the Clients window, then use the **Action** menu to select **Post to Web Portal**.
7. A confirmation message appears. Click **OK**.
8. Click **OK** when the second confirmation message appears.