Morningstar® Office Tip Sheet: Creating a Batch Template

Overview

Now that you've chosen the different report options you want to include in your package of Reports, the next step is to think about how you want to generate your reports.While you can generate each report individually for each client, a more efficient approach is to create a Batch, especially during quarter-end reporting.

Batch reports allow you to create multiple reports for multiple clients at once, speeding up the client reporting process.

The batch reporting process consists of two steps:

- creating a Batch Template
- creating a Batch Schedule

> ☞ Note: This document describes how to create a batch template. Click here for instructions on how to create a batch schedule.

What are the steps to create a Batch Template?

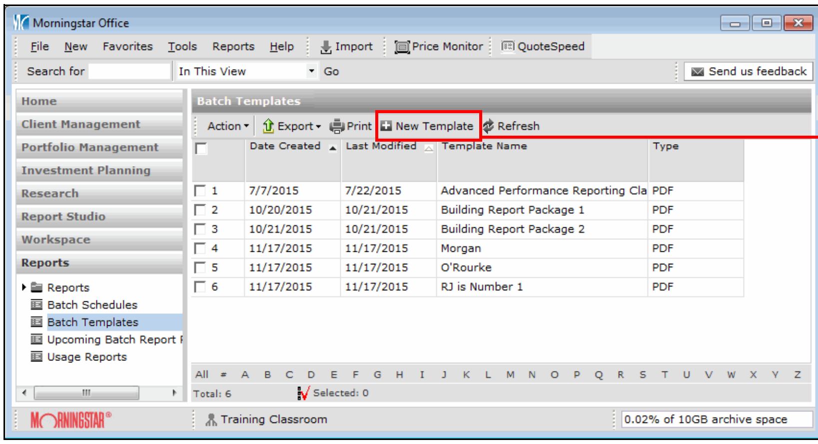
When creating a batch template, you are completing the following steps:

- Selecting the Standard reports or Report Studio templates you want to include in your Batch.
- Selecting the date range you want to report against.

How do I select the reports I want to include in my Batch Template?

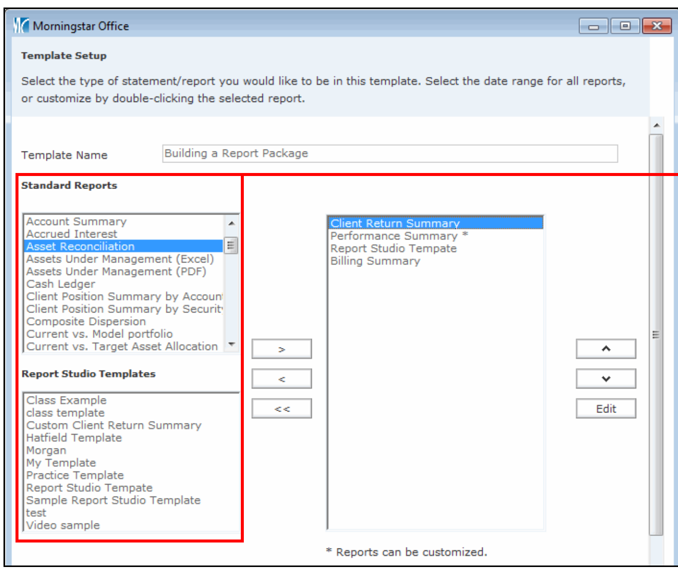
To create a Batch template, complete the following steps:

1. From the Report tab, click **Batch Template ... New Template**. The Template Setup box will open.



Click here to begin.

2. Type the **name** of your template in the Template name field.
3. Highlight the **Standard Reports** or **Report Studio Templates** you want to include in your batch.
4. Use the **arrow keys** to select each report.



You can combine both Standard reports and Report Studio Templates in a single Batch Template.

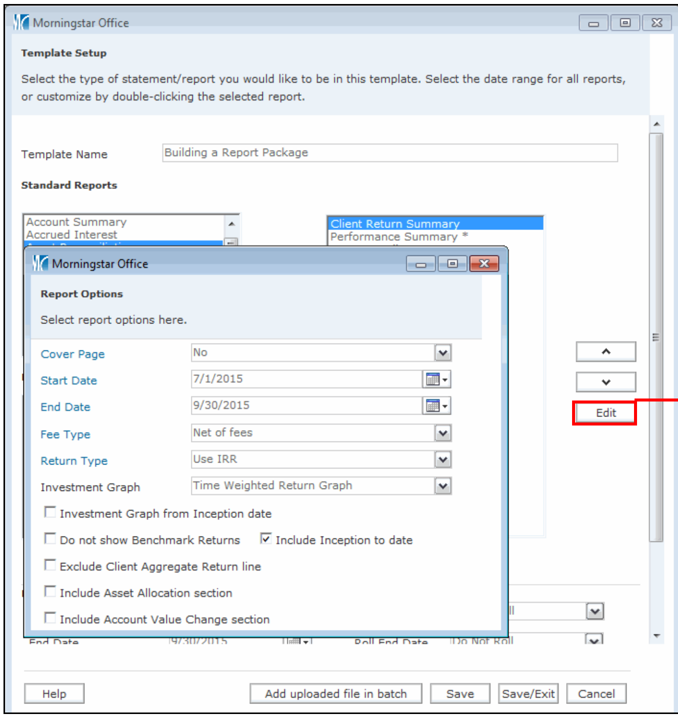
☞ You can select multiple reports at once by using CTRL + Click.

How do I select report options for the reports I've included in my batch?

To select report options for the reports you've included in your batch, complete the following steps.

1. From the Template Set-up box, highlight any report you want to select report options for and click **Edit**.

2. Select any of the **report options** available.



Click on this button to launch your Report Options Dialog Box.

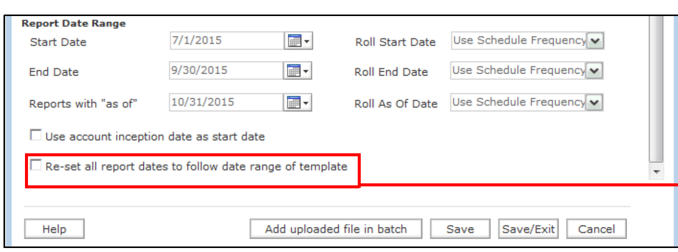
3. Repeat this step for all **reports** in your batch.

☞ Note: Benchmarks can not be changed for batch reports. All Benchmarks will be pulled from setting assignments. Click here for instructions on how to assign a benchmark to a client or account.

How do I select the dates I want to report against in my Batch Template?

To select the dates you want to report again, complete the following steps:

1. From the Template Setup box, scroll to the **Report Date Range** section.
2. Enter the **Start date** and **End date** you want to report against. These dates will appear at the top of your performance reports.
3. Enter the **Report with "as of date"** you want to report against. This will usually be the same as the **End date** you are reporting against and will appear at the top of your analytical reports.
4. If you want to run the same template each reporting period automatically, select **Use Schedule Frequency** from the Roll date drop down menus.
5. Select U**se account inception date as start date,** if desired.
6. Select **Re-set all report dates to follow the date range of template** to override any date change you may have made at the individual report level.



Choose this option to override any date changes you made within the Report Options Dialog box.

7. Click **Save/Exit.**