Morningstar[®] Office Tip Sheet: Formatting Data Tables

When it comes to data tables, not only can you alter their appearance, you can also customize the data points displayed within the template. This allows for better organization; and the ability combine data points that would normally require the use of several different standard reports from Morningstar Office.

Overview

Two types of data tables are available, as detailed in the following table:

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This color table	color table Provides this option		
Orange	Information at the client or account level. These tables can be applied to just a section of a page.		
Green	Detailed holding information, but requires a full page to display the component.		

All of these components are data tables

Both orange and green data tables allow you to add and remove data points, as well as mix and match data points, and format component title, headers, and text. This document explains how to make these edits to data table components. To add or remove data points within an orange or green data table, do the following:

- 1. Click inside the **data table** you want to format, in order to activate it.
- 2. **Right-click** any column header.
- 3. To remove a column, select **Delete Column**; to add a column, select **Insert Column**.

How do I add or remove a column from an orange or green data table?

Time Period: 7/1/2014 to	5/30/201		
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ndividual Transactional Account Joint Miles Account Viles Roth IRA	9435371 987 9277706	Cut Ctrl+X 0.872.05 2 Copy Ctrl+C 4,258.97 4,258.97 Paste Ctrl+V 5,427.20 5,427.20	28.74 10.06 -0.90
otal Portfolio Aomingstar US Market TR USD +/-Morningstar US Market TR USD Jarciave US Ann Rond TR USD	8	Delete Del	2006 7.31 22275 Select this option to add a column
+/-Barclays US Agg Bond TR USD		Insert Column Delete Column	28.20
		Data Setting	Select this option to remove a colum
		Background Color + Grid Color + Border Type + Border Style +	

To change a data point (column) in an orange or green data tables, do the following:

- 1. Click inside the **data table** you want to format to activate.
- 2. Click on any column header. The Find By dialog box opens.
- 3. Select whether you want to search for a data point by **View** or **Contains**:
 - To search by View, use the drop-down menu to select the View you'd like to search from, then click once to highlight the data point and click ADD.

Time Period: 7/1/2014 to 6		Be sure this option is selected to search fo data points by view	
ndividual Transactional Account Joint Miles Account Villes Roth IRA	Find By O View O	Contains T	
Total Fordio Vomingstar US Market TR USD +/Morningstar US Market TR USD Sarolay US Agg Bond TR USD +/-Barclays US Agg Bond TR USD	Account Number Beginning Market Value Beginning Market Value Additions Withdravals Net Investment Period Inrealized Gains/Losses Period Investment Gains/Losses Period Investment Gains/Losses Interest Income Management Fees Ending Market Value End Accrued Interest Total Gain before Management Fees Total Gain after Management Fees ADD CC	×	Use the drop-down menu to select a view

To search for a data point by (name) Contains, type the search term into the text box, then click Go. Once the data point is located, highlight the data point and click Add.

Performance	by Account	
Time Period: 7/1/2014 to 6	/30/2015	Select this option to search for a data point by keyword
ndividual Transactional Account Joint Miles Account Viles Roth IRA	Find By View OC ending market value Go	intains
Total Portolio Momingstar US Market TR USD +/-Momingstar US Market TR USD arcleys US Agg Bond TR USD +/-Barcleys US Agg Bond TR USD	Ending Market Value	Type directly into the text field, then click Go to find a data point
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To rearrange data points in an orange or green data table, do the following:

- 1. Click inside the **data table** you want to format, in order to activate it.
- 2. In the bottom-left corner of the template window, click the **Table Settings** icon. The Table Settings dialog box opens.
- 3. Select the **Columns** tab.
- 4. Highlight the **data point(s)** you want to reposition.
- 5. Use the **arrow** icons to rearrange your data points.

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2		 Fixed Income 	5.10	Joint Miles Account	9876	
habadahat yaryar amyar		 Other 	57.32	Viles Roth IRA	92777064	
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		Table Columns				
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B	6 -	Withdrawals		Λ		Select a data point here,
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Note: You can also use the Columns tab to delete a data point. Highlight the data point, then click Remove.

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

How do I reposition the data points in an orange or green data table?