

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:

This 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?

Performance by Account
Time Period: 7/1/2014 to 6/30/2015

	Acc	Beginn	Ad	Withdr	I	Di	Ending	Mc
Individual Transactional Account	9498371						0.872.06	228.74
Joint Miles Account	987						-4,258.97	10.06
Miles Roth IRA	9277708						5,427.20	-0.90
Total Portfolio							0.558.23	30.06
Morningstar US Market TR USD							-	7.31
+/-Morningstar US Market TR USD							-	22.75
Bardays US Agg Bond TR USD							-	1.86
+/-Bardays US Agg Bond TR USD							-	28.20

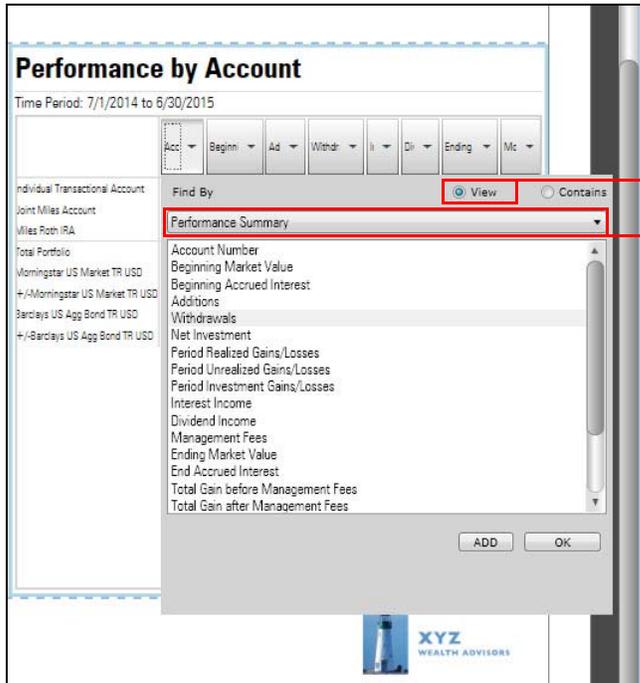
Context Menu Options:
Cut (Ctrl+X)
Copy (Ctrl+C)
Paste (Ctrl+V)
Delete (Del)
Select
Insert Column
Delete Column
Data Setting
Font Color
Background Color
Grid Color
Border Type
Border Style
Border Color

Callouts:
Select this option to add a column (points to Insert Column)
Select this option to remove a column (points to Delete Column)

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**.

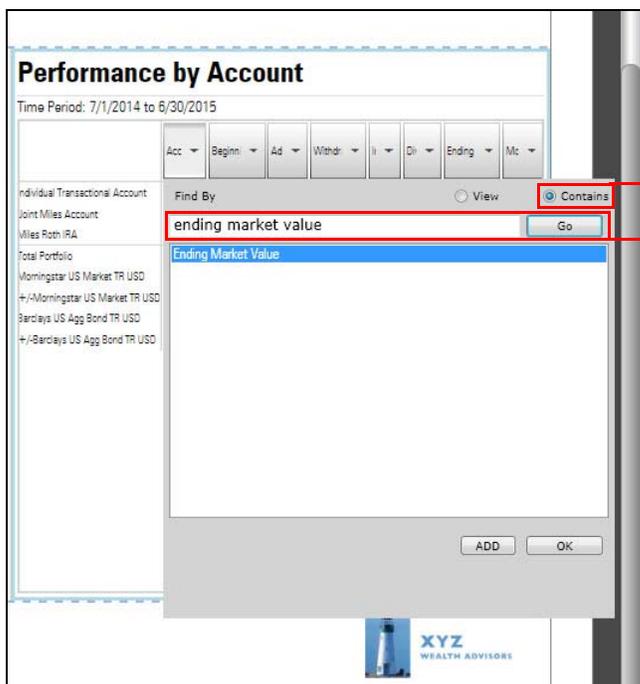
How do I change a data point in an orange or green data table?



Be sure this option is selected to search for data points by view

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**.



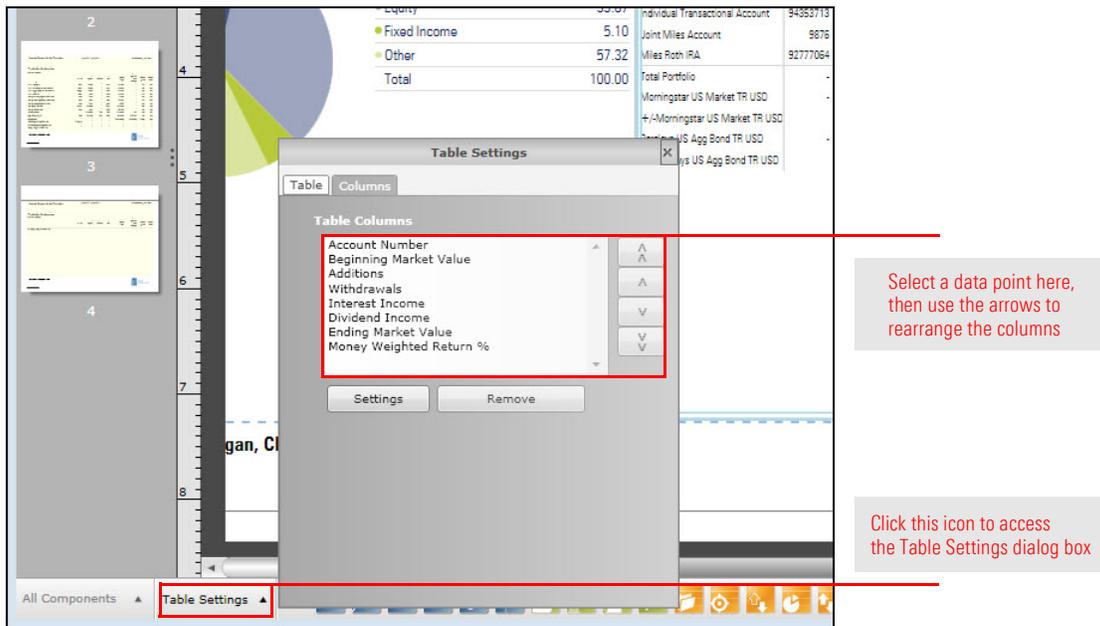
Select this option to search for a data point by keyword

Type directly into the text field, then click **Go** to find a data point

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.

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



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.