

# Morningstar® Office Tip Sheet:

## Delivering your Reporting Package to Clients

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Once you've created your batch of reports for your clients, the next step is to deliver your reporting package to your clients. With Morningstar Office you can deliver your clients reports in one of two ways:

- ▶ Uploading via the Client Web Portal
- ▶ Printing and delivering through traditional mail

Uploading via the Client Web Portal is the most efficient way to deliver Reporting Packages to your client. Not only will your client receive immediate access to their reporting package, but you will also save time and money on postage, paper and envelopes.

Once your batch schedule has completed its run, you're reports will be available to you under the Reports page within the Reports tab. From here, you can post all reports to your clients Web Portals at once.

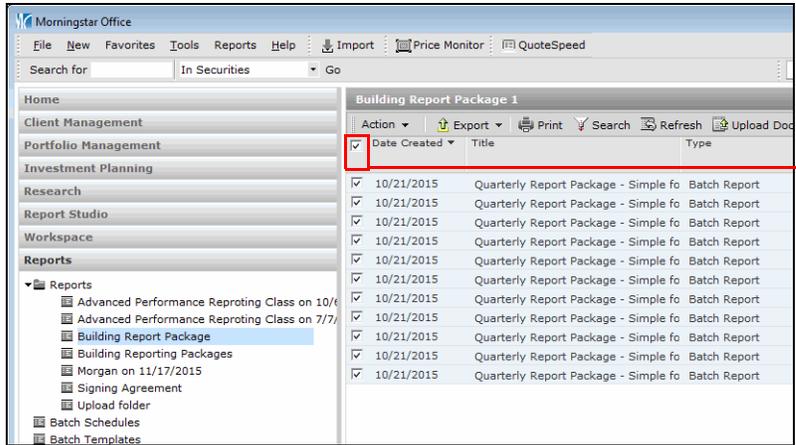
 Note: In order for your client to retrieve their Reporting package from the Client Web Portal, you must enable them to use the Client Web Portal. [Click here](#) for instructions on how to enable the client web portal for your clients.

### Overview

### How do I upload my reporting package to the Client Web Portal?

To post your package of reports to your clients' web portal, complete the following steps:

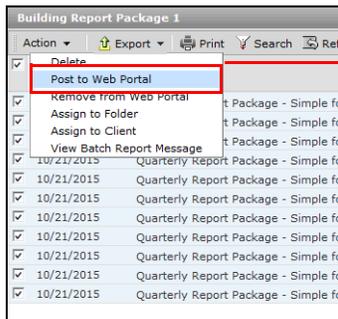
1. From the **Reports** tab, click on the **Report** page and locate your **batch report folder**.
2. Use the **Select all** button to select all reports in your folder.



Click **here** to select up to 100 reports at once.

Note: The system will only allow you to select 100 items at once.

3. Click **Actions ... Post to Web Portal**.



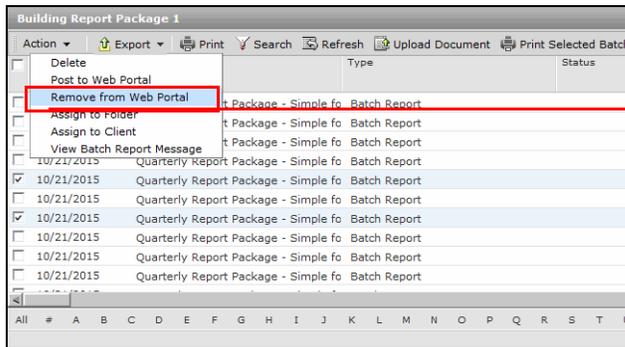
Once posted, you clients will automatically be able to view their reporting package.

Note: Even if you have not enabled the Web Portal for a specific client within this list, the report will still post to the web portal. Later, if you choose to enable the Web Portal for your client, reports you've previously posted will become available to your clients.

To remove your reporting package from one or all of your client's web portals, complete the following steps:

1. From the **Reports** page, select the **report or reports** you would like to remove.

### How do I remove my reporting package from the Client Web Portal?



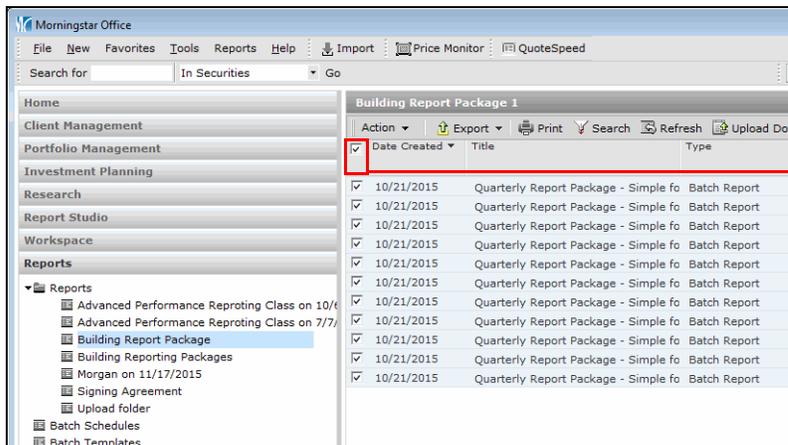
Clicking here will remove the report from your client's portal.

To print and deliver your package of reports through traditional mail, complete the following steps:

1. From the Reports tab, click on the Report page and locate your **batch report folder**.
2. Use the **Select all** button to select all reports in your folder.

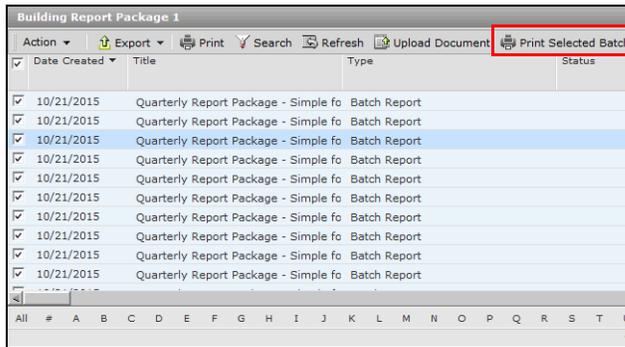
### How do I print my package of reports to deliver through traditional mail?

Note: The system will only allow you to select 100 items at once.



Click here to select up to 100 reports at once.

- From the Grid view tool bar, click **Print Selected Batch**.



Clicking here will print all of the batch reports you have selected.

- Click **OK** on the message alerting you that your reports will be printed to your default printer. From here, each report you selected will be printed.

Note: If you would like to create a mail merge to use in your mailing, click [here](#) for instructions.