Morningstar[®] Office Tip Sheet: Adding Custom Text to your Template

Adding custom text to your Report Studio template allow you to personalize your Client reports even further. Custom text allows you to add you own commentary, disclosure information, and colored borders to liven up any report.

You can add custom text to a report by creating text boxes within a report section, or on a full page.

To add custom text, do the following:

- 1. Click inside the **page** or **section of the page** for which you want to add custom text, in order to activate it.
- 2. From the toolbar on either the Home or Format tab, select Text...Custom Text.



3. **Double-click** inside the page (or section) and **type** or **paste** the content you would like to include.

🛱 Home	Chart	Data Table	Format				
Header Footer T	A 🔜 ext Image	Align Bullets No	Morningstar umbering	1	▼ B I U A I ▼ Columns	Auto Layout	
Insert			2 3	Style	4	Layout 7	
2		Sample Report Studio Template 7/1/2014 - 6/30/2015					for copying (<ctrl>+C) and pasting (<ctrl>+P) allow you to place content here</ctrl></ctrl>
	2 - - 4 - 5 - 7 - 7 - 7 - 7 - 7 - 7 - 7 - 7 - 7 - 7	After leading the ma stock prices to be far following a compreh performance by the l The S&P 500 is appro prepare for subpar m	rket higher in 2014, uti more volatile than lor ensive review of comp health-care sector has xximately flat since last harket returns over the	ities and real e g-run fundame etitive dynamic eft relatively fe quarter, leavin next five years	state are the worst-performing sector entals. .s in the global banking industry, we us w opportunities. .s stocks fully valued. We encourage i	s thus far in 20 apgraded our a nvestors to cou	

How do I add custom text

Overview

to a Report Studio template? 4. Once your content is added, you can format it to your liking using the font option icons available from the toolbar on the **Format** tab.



Text boxes can also be used to add colored borders to your report making your reports even more appealing and professional looking.

To add a colored border to a template, do the following:

- 1. Select the **Format** tab.
- 2. From the toolbar, click the **Auto Layout** icon, and divide a page into multiple sections.
- 3. Adjust the size of a section by clicking on the **line dividing two sections**, and adjusting it to the desired size.

What is another use for text boxes in a template?



- 4. Click inside the **section** for which you want to add color, in order to activate it.
- 5. From the toolbar, select **Text**...**Custom Text**.
- 6. Within the section, right-click, then select Background Color.
- 7. Select the **color** you want to include.



Once complete, your template will contain a colored border that will liven up any report or document.



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