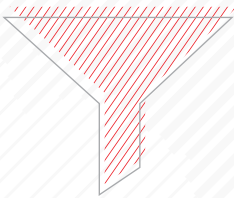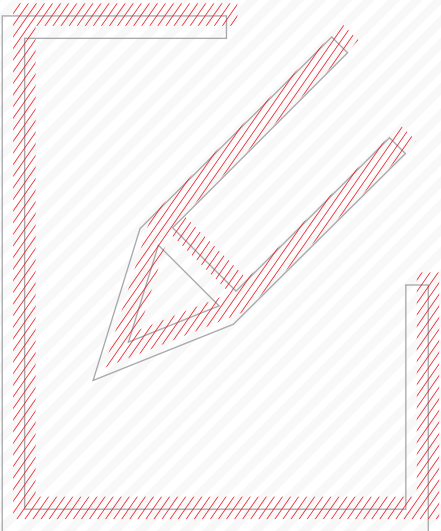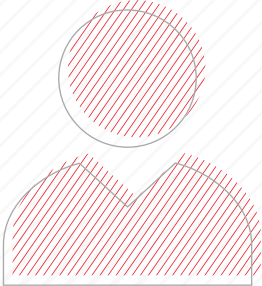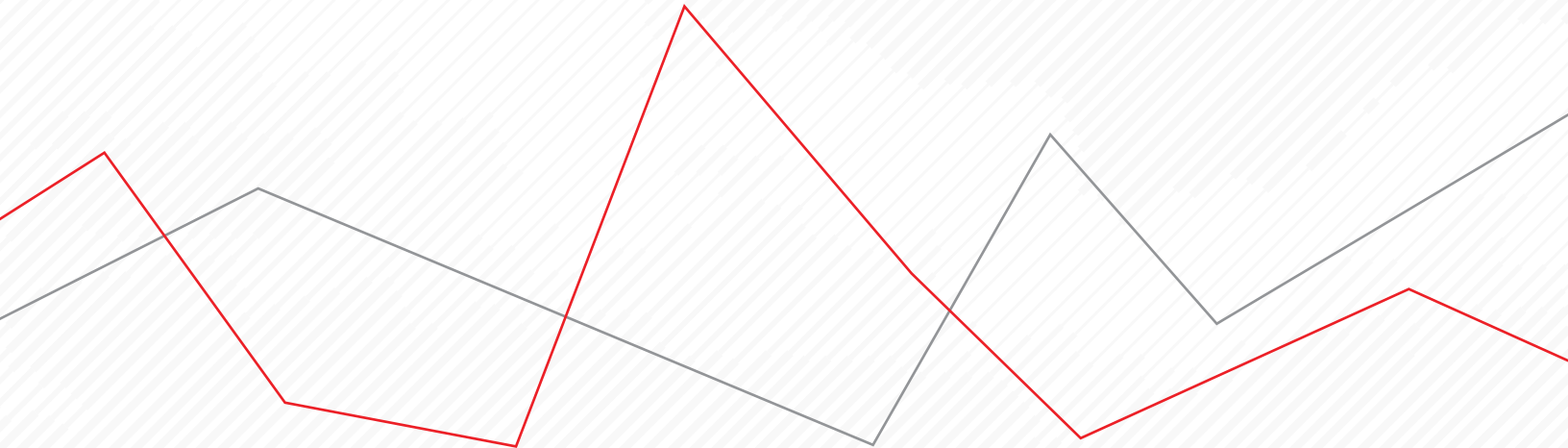**Morningstar Advisor Workstation Training Guide**

Working with Custom Views in
Morningstar Advisor Workstation^{SM}

MORNINGSTAR Advisor Workstation

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Working with Custom Views in Morningstar Advisor Workstation^{SM}

Overview

Morningstar Advisor Workstation^{SM} has hundreds of data points covering asset allocation, returns, risk, operations, and more, organized into standard views. These pre-built views are available in the grid view you see in the Research Module. However, you can assemble a custom data set into your own view using only those data points relevant to your analysis.

These data sets (called custom views) can be applied to search results and research lists. Once saved, they reside in the Custom Views page in the Research Module, and can be accessed from the Database View drop-down field within a grid view.

This guide shows you a number of ways to create custom views in Morningstar Advisor Workstation, as well as how to save those custom views, and how you can make one the default view you see when opening a data universe.

☞   Note: The following exercises use the lists created as part of the work completed in the Working with Research Lists in Morningstar Advisor Workstation guide. If you did not complete this work, you can use other lists as a substitute for those named below.

You can create a custom view by rearranging the existing columns in a view, removing the columns you do not want, and saving your new configuration. While you have the ability to create a custom view from scratch using any data point available in a given universe, you might simply be interested in quickly seeing a new arrangement of data points already offered in a pre-built view.

Exercise 1: Create a custom view by rearranging and removing columns.

For example, the Basics view shows by default for the US Mutual Fund universe. It has dozens of useful data points. You can create a custom view by dragging and dropping existing columns into an order of your choosing. Note your changes do not overwrite the pre-built view, but you can save them to a separate view.

To create a custom view by dragging and dropping columns, do the following:

1. In the left-hand navigation pane under the Research Module, select the **US Mutual Fund Universe**.
2. Move your mouse cursor over the header of the **Morningstar Category** column.
3. **Left-click** and drag the **Morningstar Category** column to the left until it is adjacent to the Ticker column.
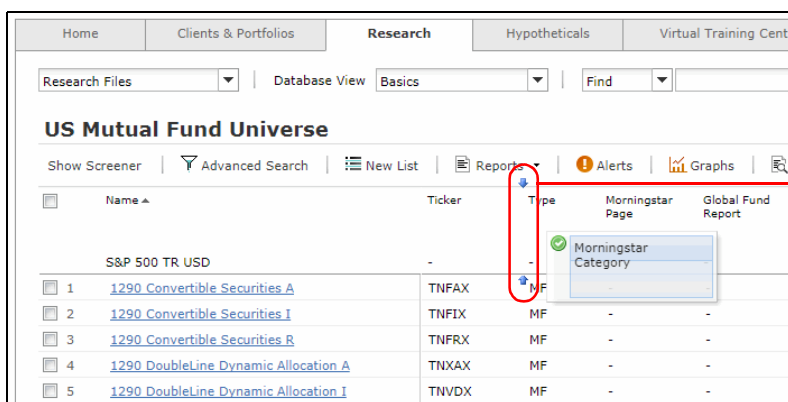
Note the icons pointing to the new location for the column as it is moved to the left

4. Release the left mouse button.
5. Move your mouse over header of the **Type** column. A down arrow appears.
6. Click the **down arrow**. A menu appears.
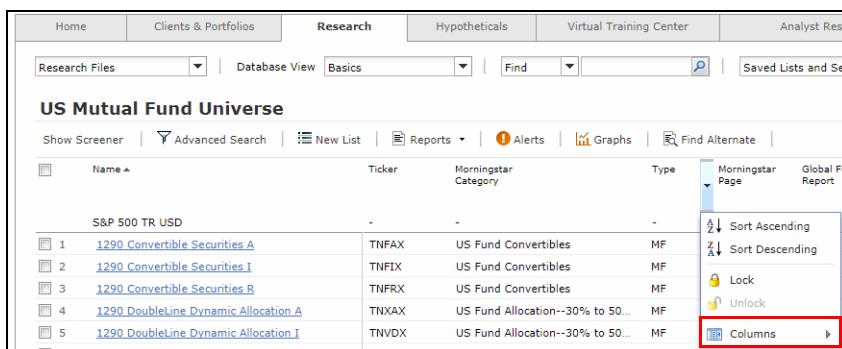
Select this option to remove columns from the current view

7. From the menu, move your mouse over the **Columns** option. A sub-menu appears, listing all the columns in the current view.

8. Un-check the following **boxes**:
    ► **Type**
    ► **Fund Objective**
    ► **Equity Style Box**, and
    ► **Fixed Income Style Box**.
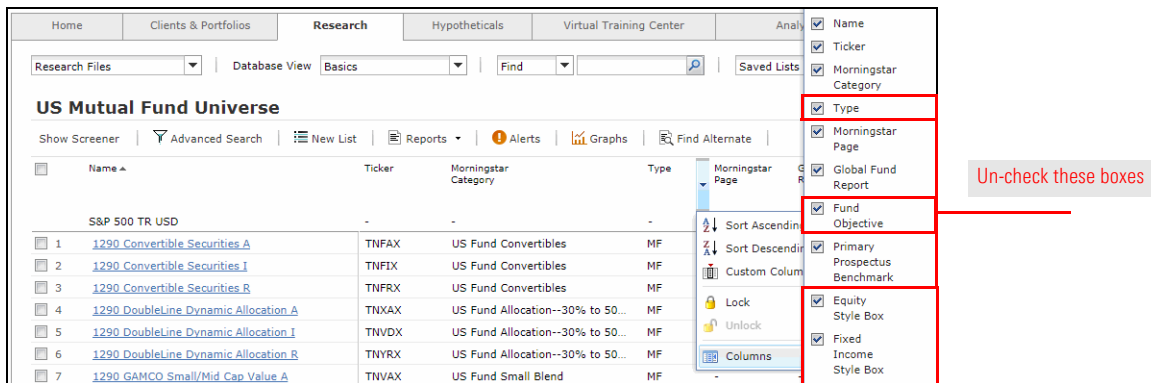
☞ Note: As you un-check the boxes, the columns are removed from the view.

9. Click away from the columns menu.
10. From the **View** menu at the top of the Advisor Workstation window, click S**ave As Custom View**. The Custom View window opens. The new position of the Morningstar Category column is noted in the Selected box on the right, and the columns you removed are not listed.
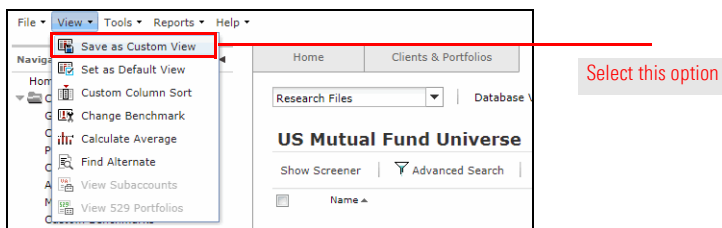
11. In the **Custom View Name** field, enter **My Basics**.
12. At the bottom of the dialog box, click the **Save** button.
13. In the upper-right corner, click the **X** icon to close the dialog box.

In this exercise, you will combine data points from two existing views to create your own custom view. To create a custom view, do the following:

Exercise 2: Create a custom view from the Custom View window

1. From the **File** menu, select **New...Custom View**. The Custom View window opens.

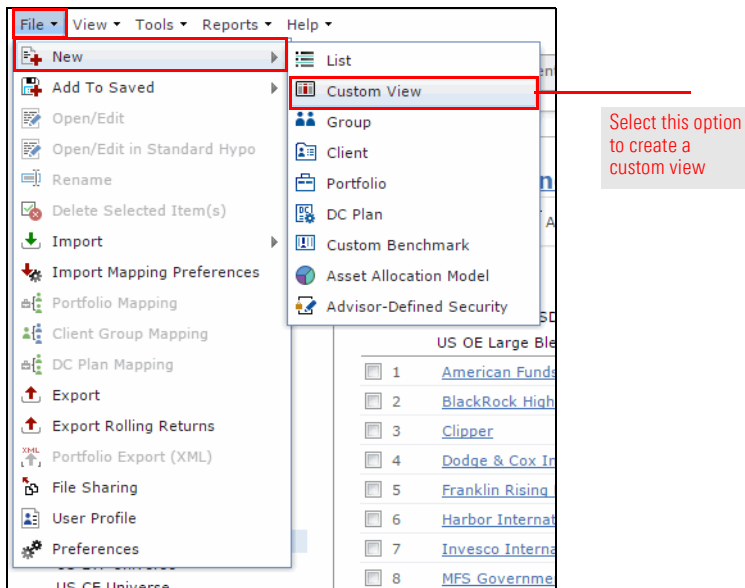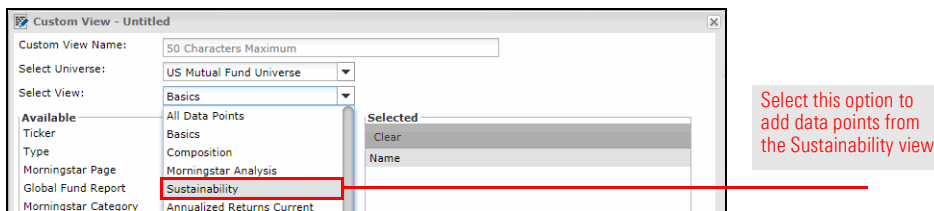Select this option to create a custom view

2. In the Custom View Name field, type **My Sustainability**.
3. Make sure the **Select Universe** field says **US Mutual Fund Universe**.
4. Click the **Select View** drop-down field and select **Sustainability**.

Select this option to add data points from the Sustainability view

5. From the **Available** box, **double-click** the following data points to add them to your custom view:
   ▶ Identifier
   ▶ Morningstar Sustainability Rating
   ▶ Portfolio Sustainability Score
   ▶ Sustainability Percent Rank in Category
   ▶ ESG Percent Rank in Category
   ▶ Sustainability Absolute Rank in Category
   ▶ ESG Absolute Rank in Category
6. Click the **Select View** drop-down field again and select **Basics**.
7. In the Available box, **double-click Morningstar Category** to add it to the view.
8. **Double-click Morningstar Rating** to add it to the view.

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9. In the Selected box, <SHIFT>+click **Morningstar Category** and **Morningstar Rating** and click the **up arrow** until they appear between Ticker and Morningstar Sustainability Rating.
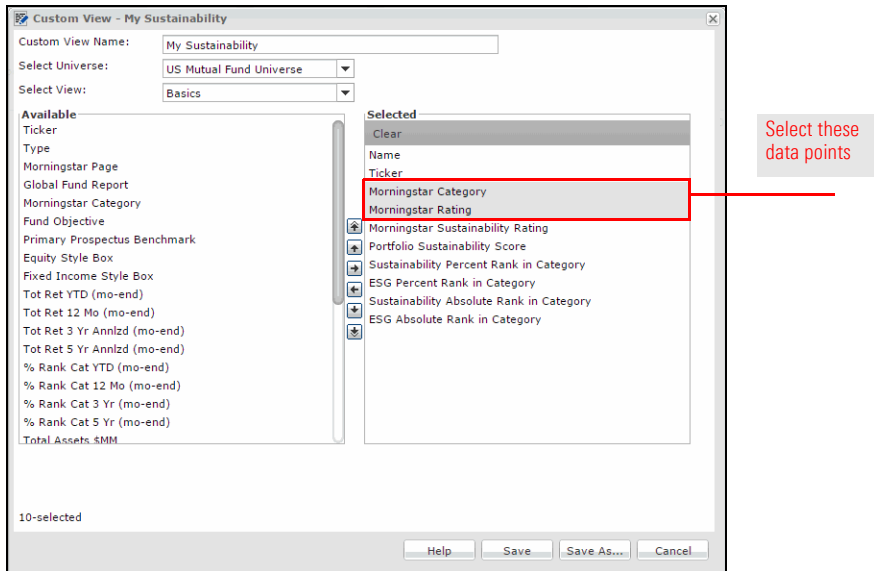
10. Click **Save**.
11. Click the **X** icon to exit the Custom View window.

To see what your custom view looks like in the mutual fund universe, do the following:

Exercise 3: Apply a custom view

1. In the left-hand navigation pane under Research, select the **US Mutual Fund Universe**.
2. Above the toolbar, select the **Database View** drop-down field.
3. Scroll past the pre-built views and select the **My Sustainability** view. The grid view updates to display your custom columns.
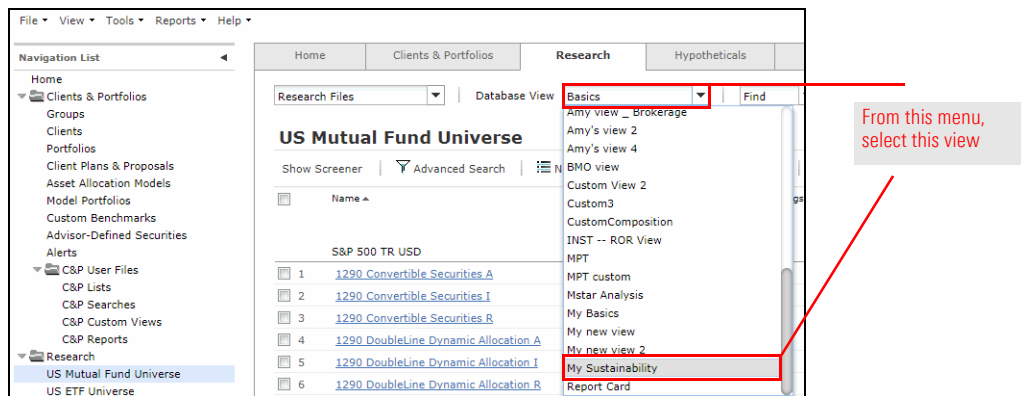
Advisor Workstation allows you to change the default view for any research universe. Instead of seeing the Basics view when you open a universe, you can choose to see a different pre-built view, or one of your custom views.

Exercise 4: Make your custom view the default view for a universe

To change the default view for the US Mutual Fund Universe, do the following:

1. In the left-hand navigation pane under Research, select the **US Mutual Fund Universe**.
2. From the **Database View** drop-down field above the toolbar, select the **view** you want to use as your default view. The grid view updates to display the new view.
3. From the **View** menu at the top of the Advisor Workstation window, select **Set As Default View**.

Select this option
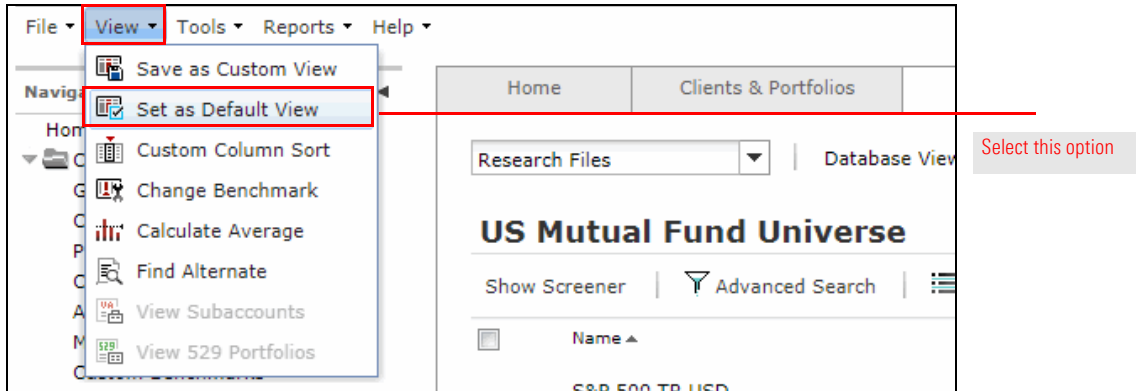
☞ Note: The next time you launch Advisor Workstation and open the US Mutual Fund Universe, you will see the new default view rather than the Basics view.

Occasionally, you may need to edit a custom view you have created. For example, you might have all of the columns you want, but not in the correct order. Or perhaps you want to add more columns or remove some of the columns you have. Rather than continually dragging-and-dropping the columns into the correct order, or creating new custom views, you can make these changes to your saved custom views by accessing the Research Custom Views page.
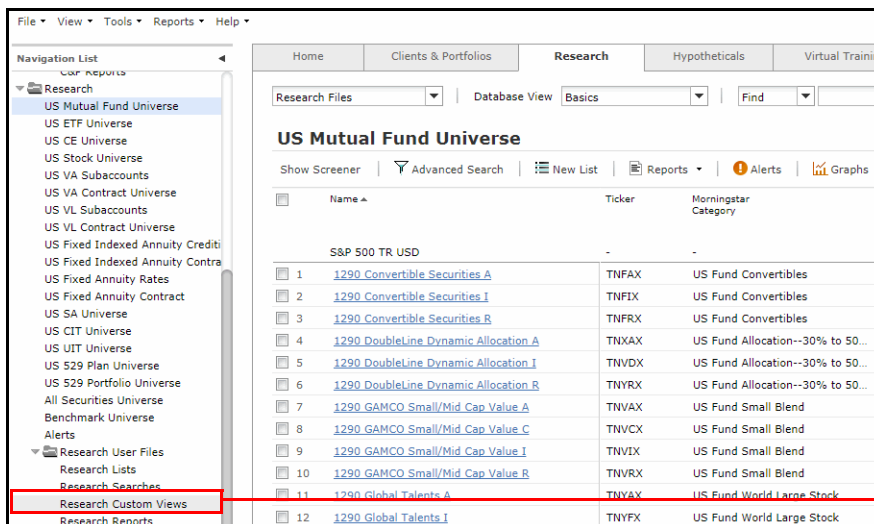
Exercise 5: Edit a custom view

In the following exercise, you will practice editing a custom data set by taking the following actions:

▶ remove a column
▶ change a column's position, and
▶ add a column.

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To edit a custom view, do the following:

1. In the left-hand navigation pane under Research User Files, select the **Research Custom Views** page.

This page shows you all of the custom views you

2. **Double-click** the **My Sustainability** custom view. The Custom View window opens.
3. From the **Selected** box, **double-click** the **Portfolio Sustainability Score** data point to remove it.
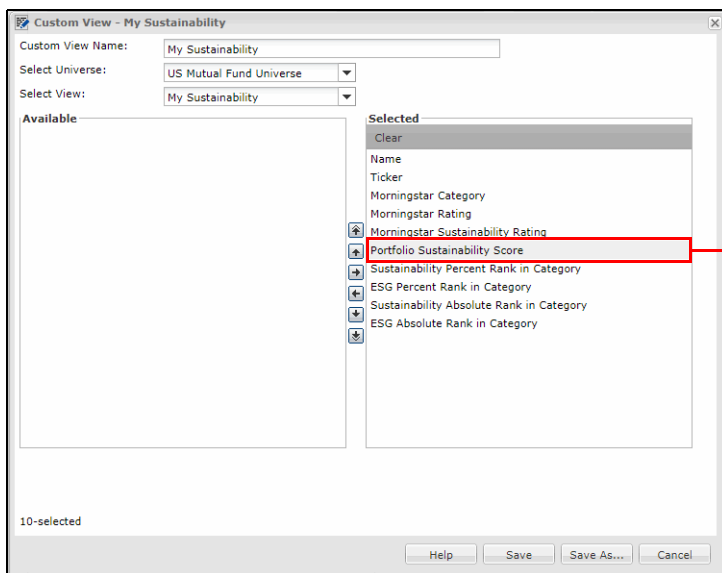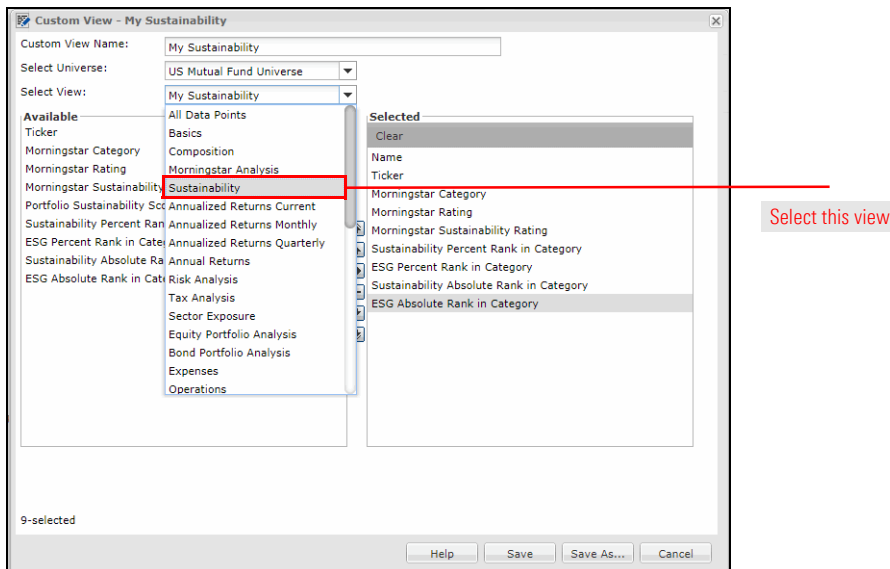

Double-click this data point

4. To change a column's position, click once on **Morningstar Rating**, then click the **up arrow** icon once to move it ahead of Morningstar Category. (This will place it to the left of Morningstar Category in the grid view).
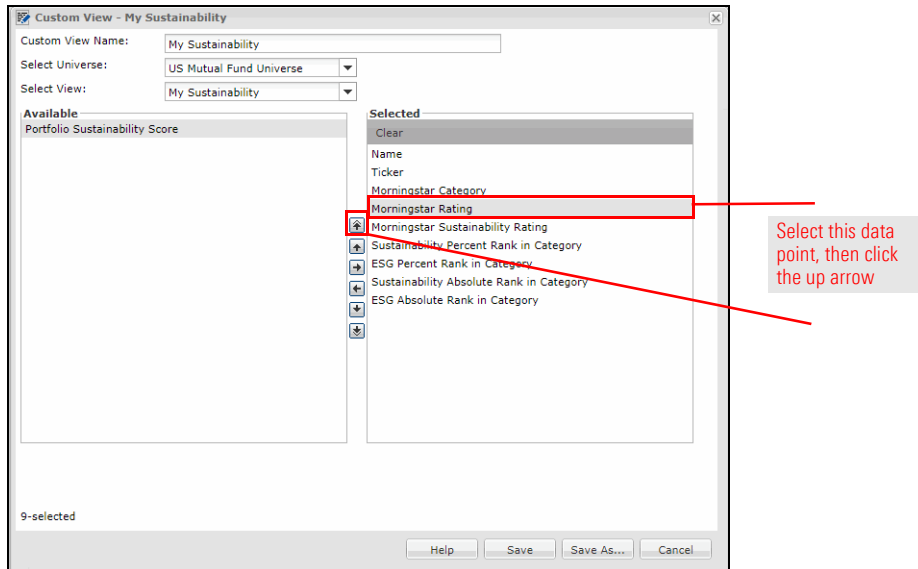
5. To add Percent of AUM Covered - ESG as a column, click the **Select View** drop-down field and scroll up to select **Sustainability**.

6. From the **Available** box on the left, **double-click** the **Percent of AUM Covered - ESG** data point to add it to the view.
7. At the bottom of the Custom View dialog box, click the **Save** button.
8. Click the **X** icon to close the Custom View dialog box.