

Advisor Workstation Training Manual: Using the Home Page

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Advisor Workstation Training Manual: Using the Home Page

This document explains how to use Advisor Workstation's Home Page. You are automatically brought to the Home Page each time you log in to Advisor Workstation.

Overview

 Note: Your Home Page could differ from what you see here, as each institution decides which features to display on the Home tab; this manual will cover all possible features.

You will learn about the following:

- ▶ What each widget does on the Home Page
- ▶ How to rearrange the widgets on the Home Page, and
- ▶ How to hide items on the Home Page.

This guide reflects a generic version of Advisor Workstation and is used for training purposes only. Your institution might not license all of the features and functions demonstrated in this manual.

Disclaimer

Using the Quick Start Widget

This section explains how to make best use of the Quick Start widget on the Home Page. The Quick Start widget allows you to immediately move to a different area of Advisor Workstation, without having to first select a module tab or an option from the left-hand navigation pane.

The table below describes the functions you can access from the Quick Start widget:

Option	Description
Portfolio Report Builder	This option brings up the Portfolio Report Builder. You can select either a client's portfolio(s) or a model portfolio and include up to 10 different reports for the portfolio and its holdings.
Group	This option brings up the Group File dialog box. From here, you can quickly combine clients or prospects into a group.
Client	This option brings up the Client File dialog box. You can immediately create a new client record from here.
Portfolio	This option brings up the Morningstar Quick Portfolio dialog box. You can either create a new portfolio, or open an existing one.
Custom Benchmark	This option brings up the Custom Benchmark dialog box. You can either create a new benchmark, or open an existing one.
Asset Allocation Model	This option brings up the Custom Asset Allocation dialog box.
Calculators	This option brings up the Calculators dialog box. You can elect to use either the College Calculator, Retirement Calculator or Savings Calculator.
Security Report Builder	This options brings up the Security Report Builder. You can select a variety of investments (or a list you've previously saved) and generate up to eight reports for those items.
Hypothetical	This option brings up the Morningstar Hypothetical Illustration dialog box. You can either create a new hypothetical illustration, or open an existing one.
Advanced Search	This option opens the Advanced Search dialog box. You can either create a new search, or open an existing one. Note that the universe defaults to US Mutual Funds.
List	This option opens the List dialog box. You can create a new list of investments, clients or hypothetical illustrations.
Graphs	This option opens the Graphs dialog box. You need to click the Find/Add Securities button on the right side of the dialog box to include items for a graph.
Clients & Portfolios Alerts	This option brings up the Alerts Settings dialog box for portfolio-level alerts. You can either create a new alert from here, or edit an existing one.
Research Alerts	This option brings up the Alerts Settings dialog box for security-level. You can either create a new alert from here, or edit an existing one.

Overview

What is available from the Quick Start widget?

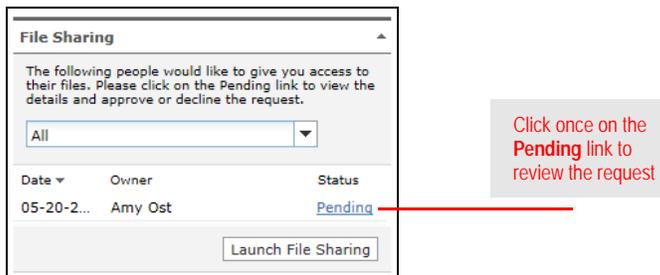
Using the File Sharing Widget

This section explains how the File Sharing widget works. This widget allows you to review and accept or decline requests from others who would like to share files with you.

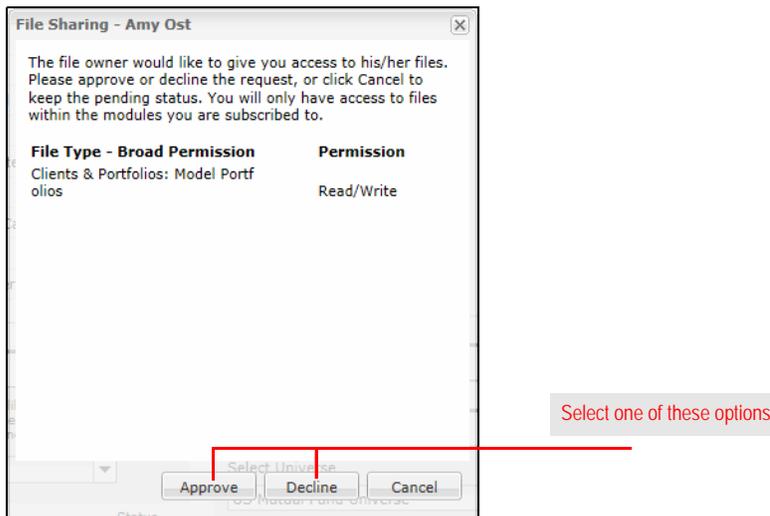
Note: You cannot share files with others by using this Home Page widget. For that, you must go to the **File** menu and select **File Sharing**.

To review, accept or decline a file-sharing request from the Home Page, do the following:

1. Use the **drop-down field** to search for requests from the past week, month or all time.
2. When you see an item listed in the File Sharing widget, click **Pending**. The File Sharing dialog box appears.



3. To accept the request, click **Approve**. To reject the request, click **Decline**. The dialog box will close, and the status on the Home Page will update to reflect your choice.



Overview

How to use the File Sharing widget

Using the Recently Modified Files Widget

This section explains how the Recently Modified Files widget works.

Overview

The Recently Modified Files widget shows the top 25 recently modified files from different parts of the Workstation. You can jump immediately to the area (client record, search by criteria, etc.) of Advisor Workstation by using the hyperlinks in this widget

 Note: Shortcuts available here will vary, depending on your institution's solution.

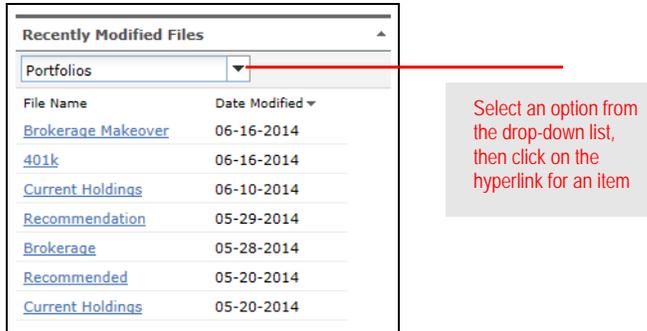
You can see the following file types from this widget:

- ▶ Groups
- ▶ Clients
- ▶ Portfolios
- ▶ Client Plans
- ▶ Asset Allocation Models
- ▶ Model Portfolios
- ▶ Custom Benchmarks
- ▶ C&P Lists
- ▶ C&P Searches
- ▶ C&P Custom Views
- ▶ Research Lists
- ▶ Research Searches
- ▶ Research Custom Views
- ▶ Hypotheticals
- ▶ Hypo Lists
- ▶ Hypo Searches, and
- ▶ Hypo Custom Views.

To use the Recently Modified Files widget, do the following:

1. Click the drop-down field and select a **file type**.
2. Click on the **hyperlink** for the record you want to open. The corresponding dialog box or area will open automatically.

How to use the Recently Modified Files widget



The screenshot shows a widget titled "Recently Modified Files" with a drop-down menu set to "Portfolios". Below the menu is a table with two columns: "File Name" and "Date Modified". The table contains several rows of data, each with a blue hyperlink for the file name. A red arrow points from a callout box to the drop-down menu.

File Name	Date Modified
Brokerage Makeover	06-16-2014
401k	06-16-2014
Current Holdings	06-10-2014
Recommendation	05-29-2014
Brokerage	05-28-2014
Recommended	05-20-2014
Current Holdings	05-20-2014

Select an option from the drop-down list, then click on the hyperlink for an item

Using the Security Finder Widget

This section explains how to use the Security Finder widget. This tool allows you to generate the Investment Detail Report or Morningstar Quicktake report for one security at a time. This saves time from having to go to the Research universe (or a client's portfolio), find the security and generate the report from there.

Remember that you can search for only one security at a time.

To use the Security Finder widget, do the following:

1. From the Select Universe drop-down field, choose the **type** of investment you are looking for.
2. Type the **name** or **ticker** in the find field. To find a security based on a portion of the name, type at least four characters, otherwise the system will use a "begins with" search.
3. Select the **name** of the item you want. If the item does not appear in the initial list that appears, click **View full results**.

The screenshot shows the Security Finder widget interface. It includes a title bar, a 'Select Universe' dropdown menu, a search input field, a 'Select Report' dropdown menu, and a 'Launch Report' button. A red callout box points to the search input field with the text: "Type the name of the item you want to find here".

4. Click either the **PDF** (for the Investment Detail Report) or **HTML** (for the Morningstar Quicktake report) button. The report appears in new window.

Overview

How to use the Security Finder widget

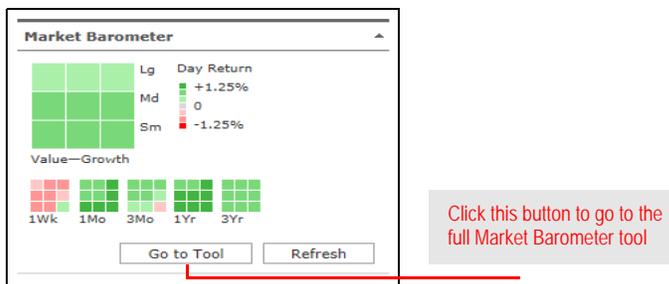
Using Morningstar's Market Barometer

This section explains what the Morningstar Market Barometer is, and how to best leverage it with clients. The Market Barometer tool shows you how different areas of the U.S. stock market performed over a given time period. This allows you to demonstrate to a client the necessity of diversification, how chasing the market can lead to big losses, and how a model portfolio you have prepared compares to one they have created.

As seen on the Home Page of Advisor Workstation, the Morningstar Market Barometer reflects the performance of the U.S. stock market, based on Morningstar's own indexes. Note that this does not reflect the Dow, S&P 500, NASDAQ, or any other proprietary index.

The Morningstar Market Barometer is updated every four minutes when the market is open. You can also see thumbnail images of the market's performance for the following trailing time periods:

- ▶ 1 week
- ▶ 1 month
- ▶ 3 months
- ▶ 1 year, and
- ▶ 3 years.

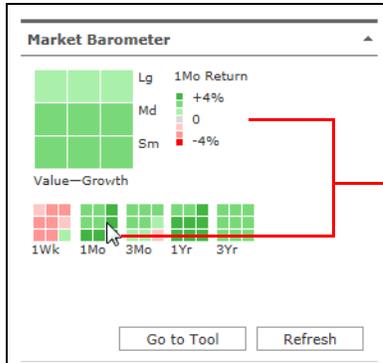


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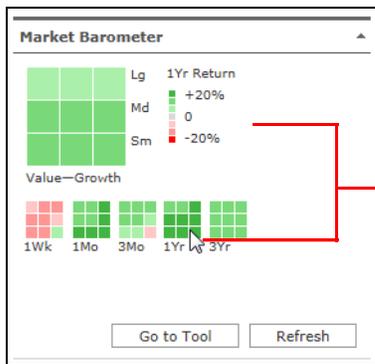
What is the Morningstar Market Barometer?

The Market Barometer widget has one piece of interactivity: if you move your mouse cursor over one of the trailing time-period thumbnail images, the Return scale to the right of the daily Market Barometer will update to show you the range of returns for that time period.

How do I use the Market Barometer widget?



Note the scale for the 1-month trailing return here...



...compared to the scale for the 1-year trailing return here

Using the Top Securities Widget

This section explains how to use the Top Securities widget. This widget will display one of two pieces of information:

- ▶ The top 25 investments for which you generated an Investment Detail Report in the previous month, or
- ▶ The top 25 securities owned in your practice, based on asset size.

 Note: each of these pages is updated on a separate schedule during month-end processing. The Investment Detail Reports will be updated on the fourth business day of the month. The Portfolio data is updated on the 12th business day of the month.

To use the Top Securities widget, do the following:

1. If you want to see portfolio data, select **Portfolios** from the drop-down field.
2. Scroll to the right to see additional data points. Remember that you can sort the columns here as you would in any other Advisor Workstation spreadsheet.

Top Securities		
Top Securities - Portfolios		
Rnk	Name	Tot R... YTD
1	Franklin Templeton Moderat...	3.30
2	MFS® Government Securitie...	2.57
3	Franklin Rising Dividends A	3.83
4	Invesco International Growt...	4.90
5	Hancock Horizon Burkenroad...	3.94
6	Aberdeen International Equit...	7.27
7	Principal High Yield A	5.06
8	Selected American Shares D	3.08
9	BlackRock High Yield Bond B...	5.37
10	Dodge & Cox Stock	5.07
11	Lord Abbett Small Cap Value...	0.84
12	Dodge & Cox Income	4.03
13	Dodge & Cox International S...	8.06

Use this drop-down field to switch to seeing the top securities in your portfolios

Overview

How do I use the Top Securities widget?

Modifying the Home Page

This section explains how to modify the widgets on the Home Page. You can do the following with the Home Page widgets:

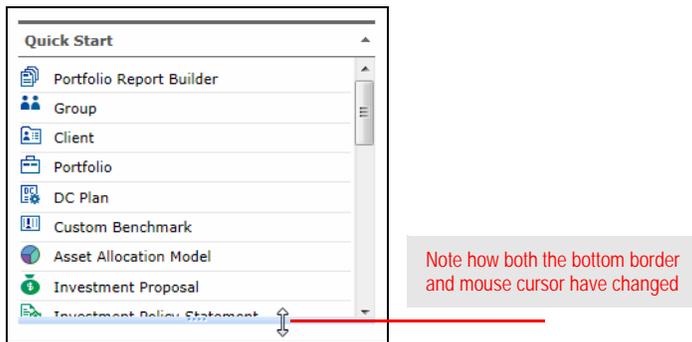
- ▶ Change their height
- ▶ Reposition them, or
- ▶ Collapse them.

You can change the height of a widget (i.e., how “tall” it appears), but not its width.

☞ The widgets will become slightly wider if you collapse the left-hand navigation pane.

To change the height of a widget, do the following:

1. Move your mouse cursor over the bottom border of a widget. The bottom border and cursor will change.



2. Left-click and drag the border down (or up) to change the height of the widget.
3. Release the left mouse button when finished. The new height will be saved until you change it.

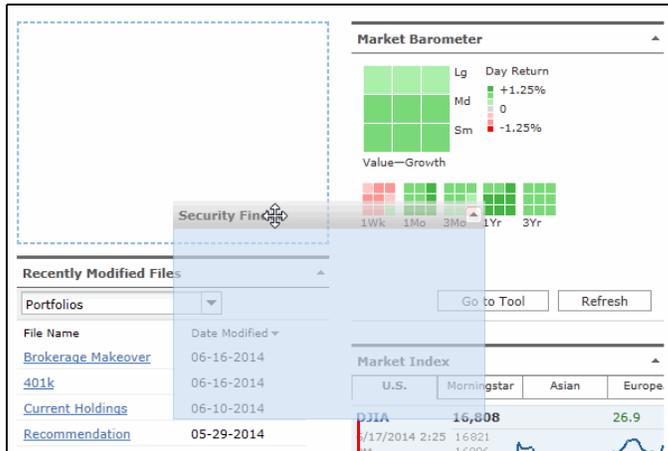
Overview

How do I change the height of a widget?

You can change where each widget appears on the Home Page. Note that this updated setting will be saved. To reposition the widgets on the Home Page, do the following:

How do I reposition the widgets on the Home Page?

1. Move your mouse cursor over the title bar for a widget. The cursor will change to a four-headed arrow.
2. Left-click and drag the widget. You will see an outline of the widget as you begin to move it to the new location.

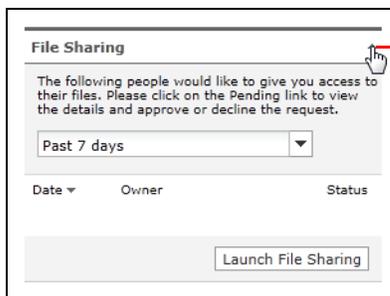


Note the silhouette of the widget as it is dragged to a new location

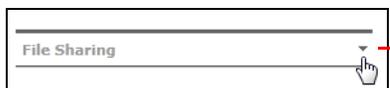
3. When you have the widget in the position you want, release the left mouse button.

While you cannot completely remove a widget from the Home Page, you can collapse it such that its content is not seen. To collapse a widget, click the arrow icon in the upper-right corner of the widget's title bar. You can expand the widget by clicking the same icon again.

How do I hide a widget?



Click this icon to collapse a widget



Click the same icon to expand a collapsed widget