

The background is a dark green color with a complex pattern of lighter green lines. These lines form a series of parallel, slightly curved paths that create a sense of depth and movement. A prominent feature is a large, white, angular shape that resembles a stylized 'M' or a series of connected line segments, positioned centrally. This shape is filled with a lighter shade of green, matching the overall color scheme.

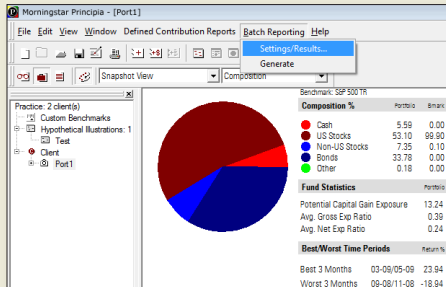
Morningstar® Principia®

Best Practices and Helpful Hints for 2012

Follow These Steps to Improve Your Workflow

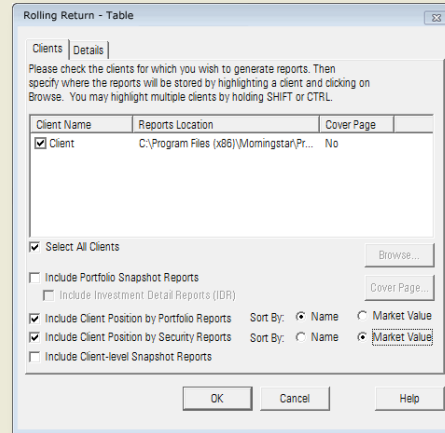
To create Client Position batch reports, do the following from Snapshot View in Portfolio Mode:

- From the menu bar, click **Batch Reporting... Settings/Results.**

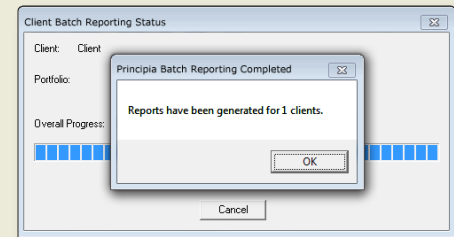


- In the Batch Reporting Configuration window, check the **box** next to the name(s) of the client(s) you want to include in a batch.

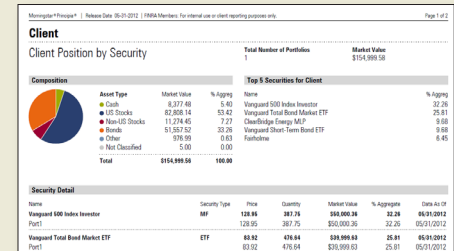
- Click the **box(es)** next to Include Client Position by Portfolio Reports and/or Include Client Position by Security Reports.



- For the Client Position report(s) you have selected, choose either **Name** or **Market Value**, then click the **OK** button.
- Click **Batch Reporting... Generate** to create the report.



- To retrieve the reports, go to the folder you determined when setting the parameters.



- If you have any questions or need help with other areas of Principia, please call our Product Support team at **312 424-4288** or visit our Customer Education and Training site (<http://principia.morningstar.com/Training/>).