Using Presentation Studio

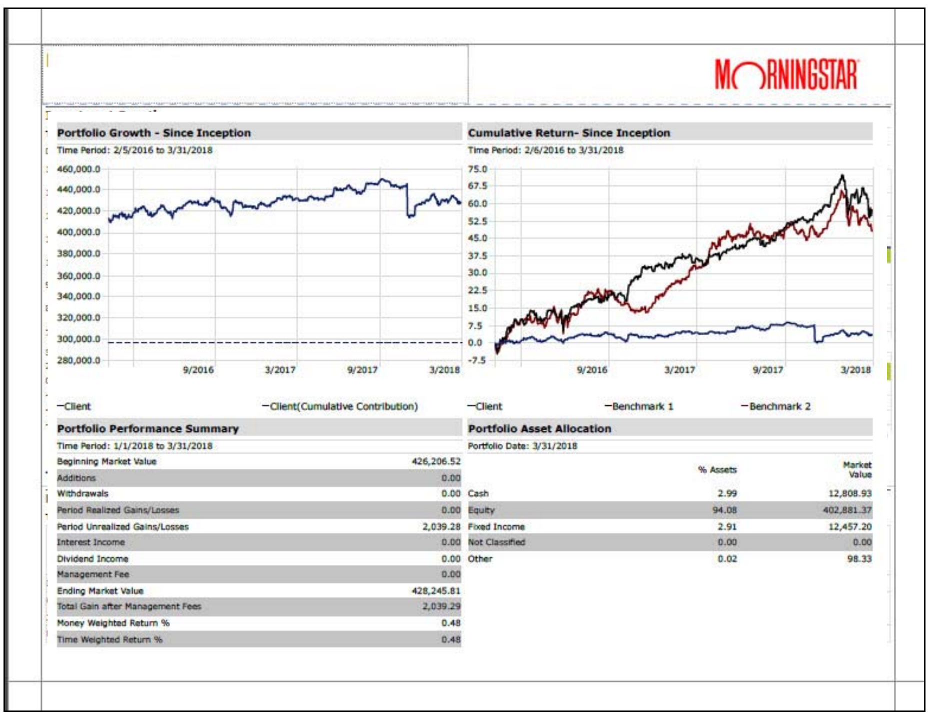
MORNINGSTAR Office

Contents

Introduction to Presentation Studio

Overview

Presentation Studio is the Morningstar tool for creating custom reports. With flexible charting and reporting capabilities, and access to Morningstar databases, Presentation Studio helps you mix and match components to create compelling client reports. You have control over both the content and format of your presentations, enabling you to use charts, tables, images, and text to tell your story.



Presentation Studio uses charts, tables, images, and text to communicate information about investments.

This guide describes the following topics:

Understanding Presentation Studio Terminology

Overview

In this section, you will learn some common terms used in Presentation Studio.

What Presentation Studio terminology do I need to know?

Some of the terms used in Presentation Studio and this guide might be new to you. They are defined in this table.

Term	Definition
Report	A report is a document reflecting information for a specific client Save as a report when you create your report for specific client and manage your report directly from Presentation Studio. You cannot publish a report to Morningstar Office Cloud.
Template	A template is a Presentation Studio document created to serve as the basis for a specific type of report. A template typically contains text, charts, tables, and images selected to present information in service of the template's purpose. When a template is used as the basis for a report, its content updates to reflect the portfolio(s) selected for inclusion in the report. For more information, see Creating a Template on page 13.
Component	A component is an element used to present a specific type of information about a portfolio or portfolios. Tables, charts, text, and images are components. Each of these is described in this guide.

Downloading and Installing Presentation Studio

Overview

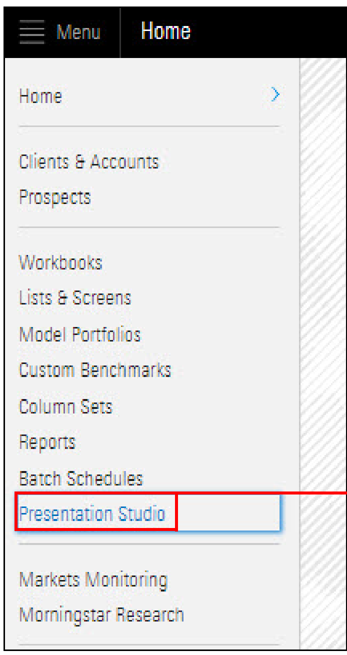
In this section, you will learn how to download and install Presentation Studio.

Exercise 1: Download and install Presentation Studio

Presentation Studio is a standalone tool, separate from other Morningstar products. In this exercise, you will learn how to download and install Presentation Studio.

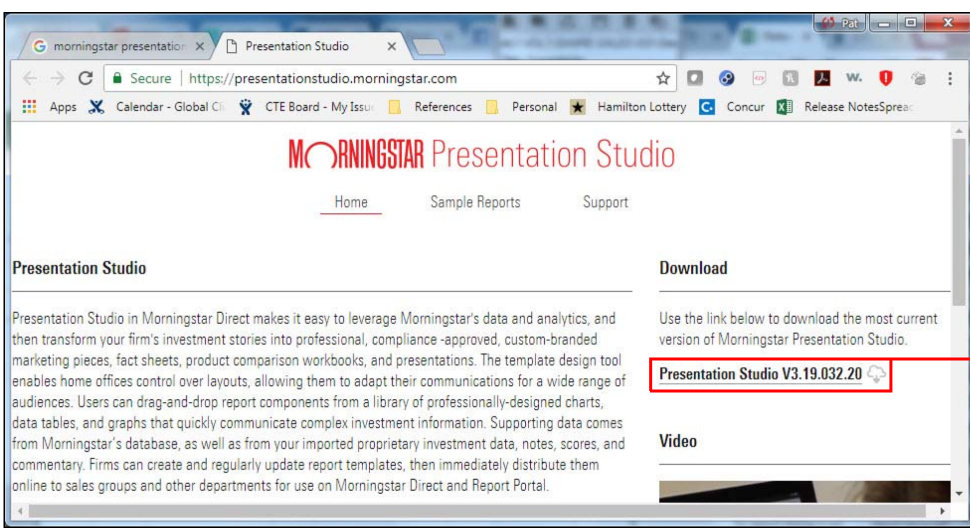
To download and install Presentation Studio, do the following:

1. In Morningstar Office Cloud, from the **Menu**, select **Presentation Studio**. The Morningstar Presentation Studio home page opens.



Click here.

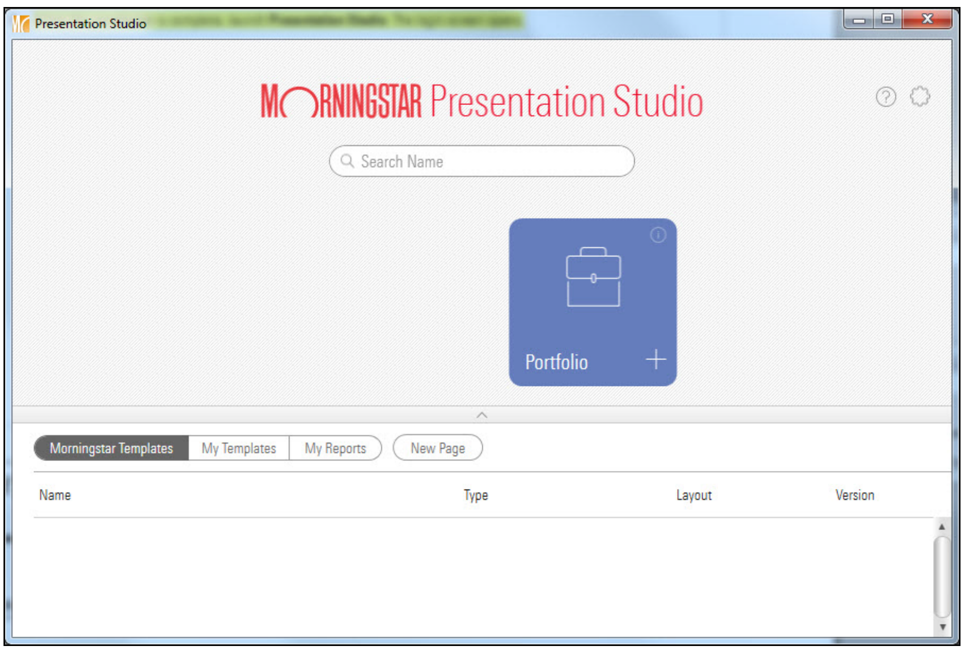
2. On the right side of the page, in the Download area, click the **download link**.



The latest version number is displayed in the download link.

3. You are prompted to save the morningstarpresentationstudiosetup.exe file. **Navigate** to a location on your system and click **Save**.
4. The action required in this step depends on your browser settings. Do one of the following:
   - If the file name is displayed in the download area at the bottom of the browser, click the **file name** and from the menu, select **Open**. The Install Wizard window opens.
   - If the file name is not displayed in the download area of the browser, **navigate** to the location where you saved the morningstarpresentationstudiosetup.exe file. **Double-click** the **file** to launch the Install Wizard.
5. Follow the on-screen **instructions** in the Install Wizard.
6. When the installation is complete, launch **Presentation Studio**. The login screen opens.
7. **Log in** with your usual credentials for Morningstar Office Cloud. The Presentation Studio Home page opens.

   ☞ Note: The Installation Wizard creates a shortcut to Presentation Studio on your desktop. You can launch Presentation Studio at any time by double-clicking the shortcut icon.



Understanding the Capabilities of Presentation Studio

Overview

Presentation Studio uses Morningstar data (as well as custom data, model portfolios, and custom benchmarks) to allow you to create reports. You can present information in a variety of charts, tables, and images, along with analysis and commentary from Morningstar Research.

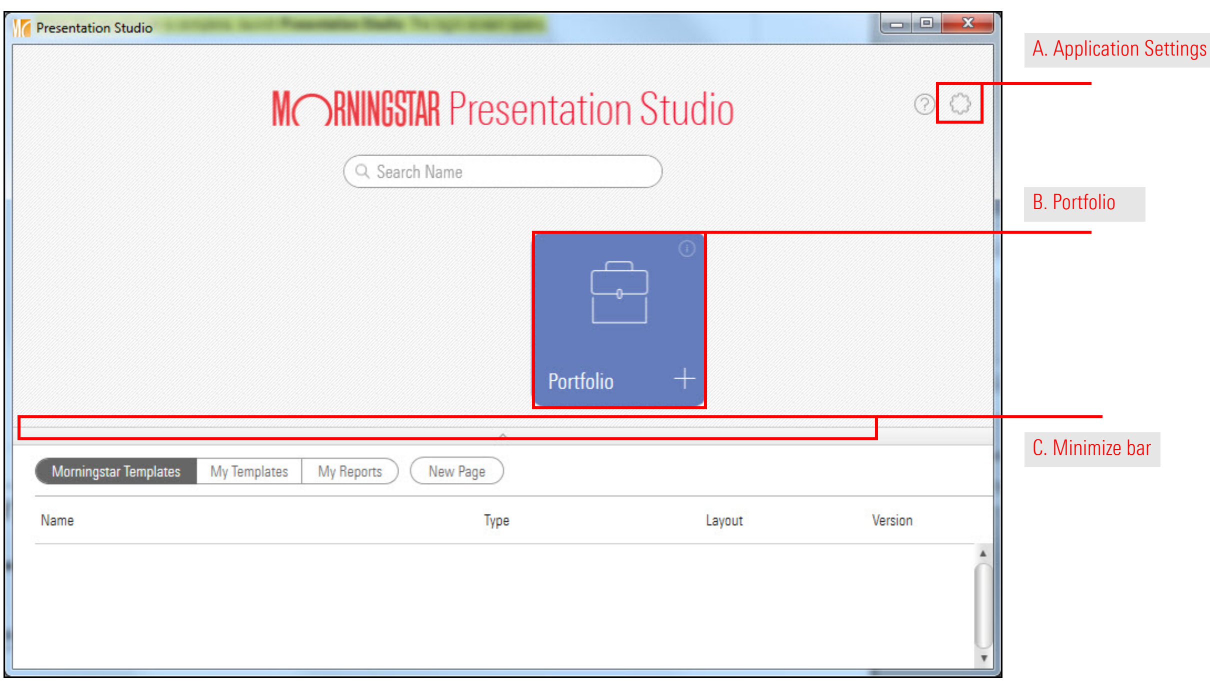
This section helps you understand the following:

- what you can do on the Presentation Studio Home page (page 8), and
- what you can create in Presentation Studio (page 10).

What can I do on the Presentation Studio Home page?

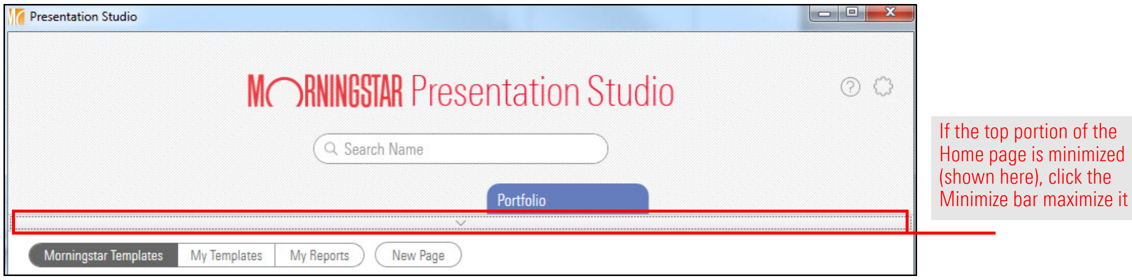
The Home page is the starting point for your work in Presentation Studio. From here, you can do the following:

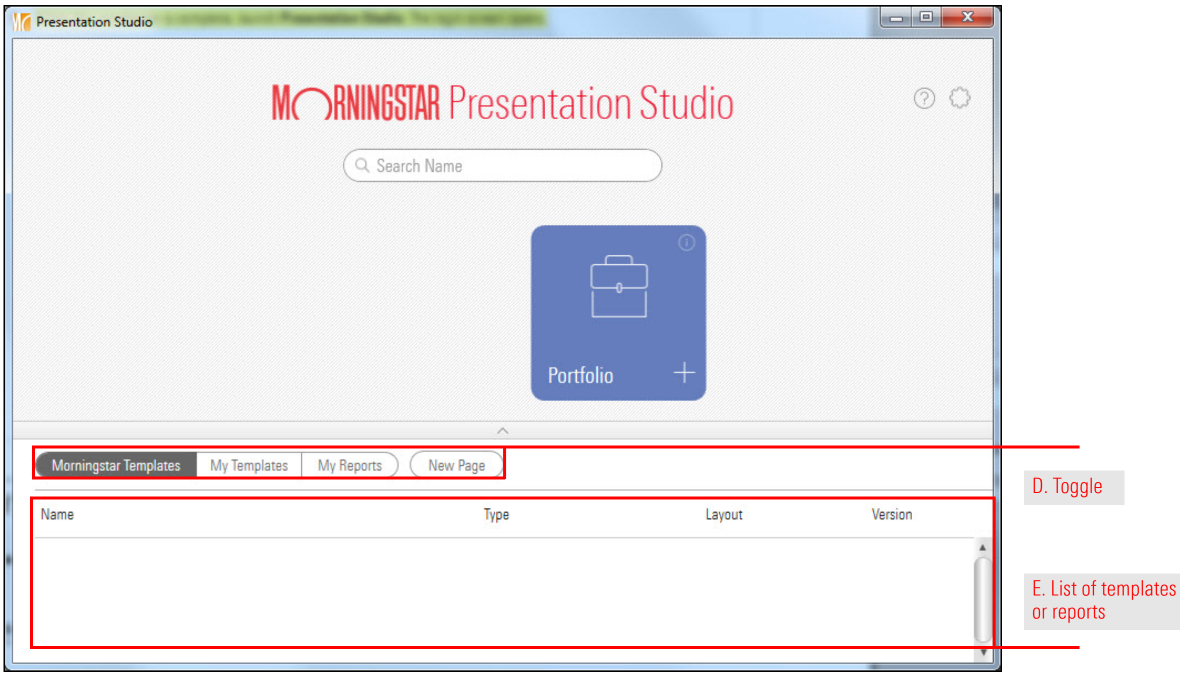
- open an existing template
- create a new template
- publish your template to Morningstar Office Cloud so you can use it when generating a report.



A. Click the **Application Settings** icon to open the Application Settings.
B. Click **Portfolio** to create a new portfolio report.

C. Click the **Minimize bar** to reduce the size of the top portion of the Home page.





D. On the toggle, click **Morningstar Templates** to display a list of Morningstar Templates.

☞ Note: Initially, your Home page shows no reports or templates. Those lists will populate as you create reports and templates.

E. The list reflects the selection on the toggle. From the list, you can do the following:

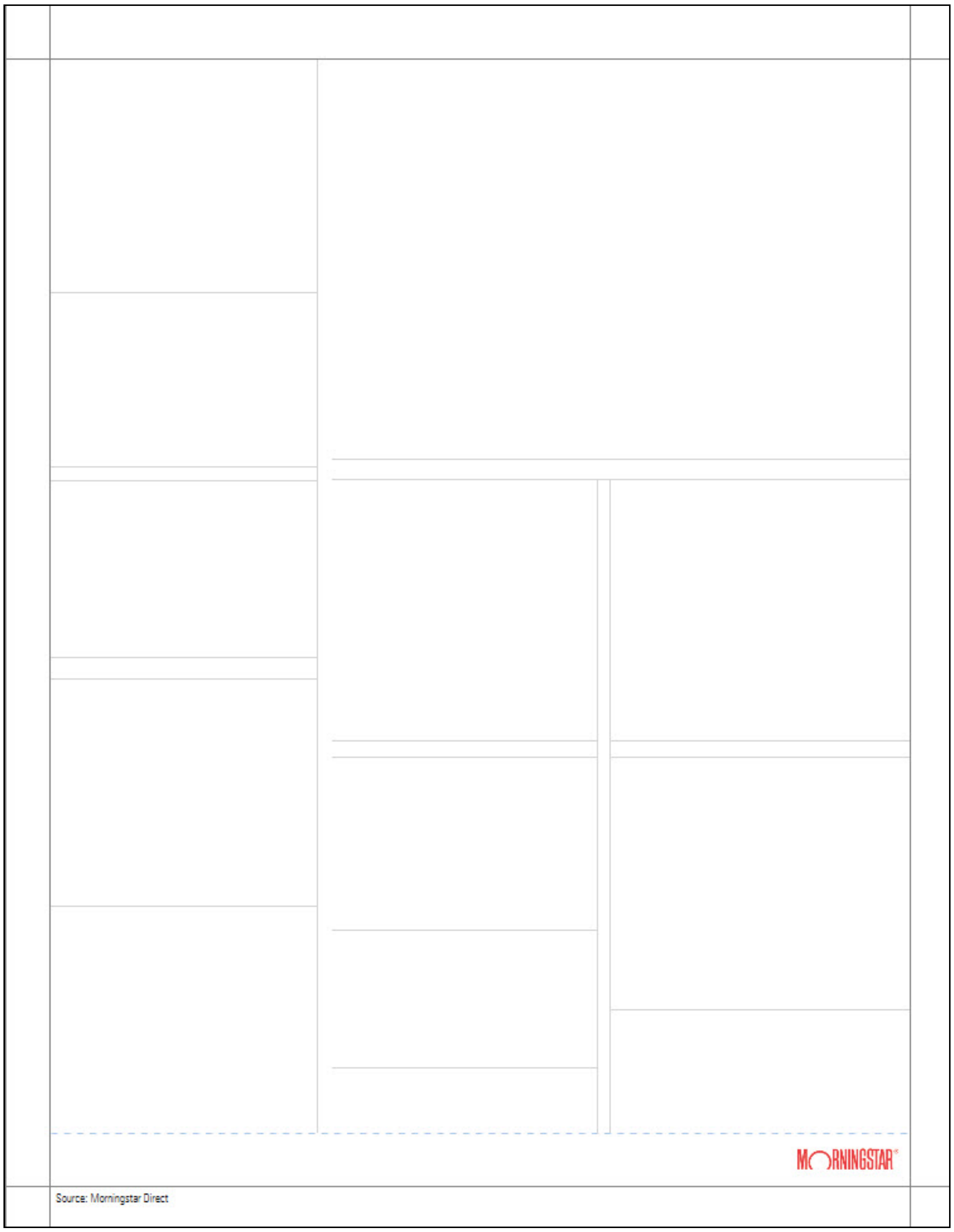
- **Double-click** an **entry** to open that template or report
- **Sort** on any column by clicking the column header (Name, Type, and so on), and
- **Scroll down** to see more list entries.

What can I create in Presentation Studio?

In Presentation Studio, you can create templates and then use your templates as the basis for your reports. The exciting part of Presentation Studio is that you can use Morningstar data and research in a graphic page layout.

> ☞ Note: If you have not worked with page layout before, don't worry. The processes presented in this guide do not require a background in design.

For instance, you can have a page divided into sections and laid out like this:



The cells are outlined in light blue

With a few clicks, you can populate it with data and Morningstar research content, so it looks like this:

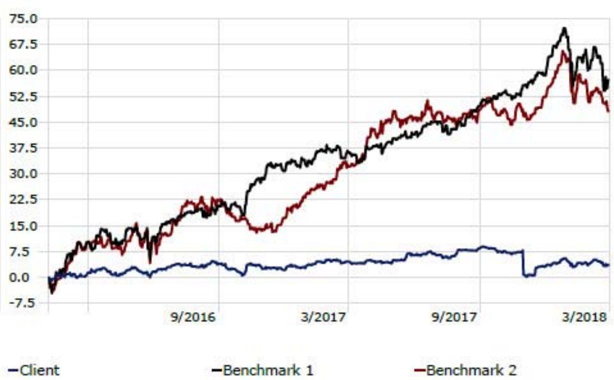
Each cell can conttain a chart, table, or text representing Morningstar data and analysis.

Portfolio Growth - Since Inception

Time Period: 2/5/2016 to 3/31/2018

Cumulative Return- Since Inception

Time Period: 2/6/2016 to 3/31/2018



Portfolio Performance Summary

Time Period: 1/1/2018 to 3/31/2018

Beginning Market Value	426,206.52
Additions	0.00
Withdrawals	0.00
Period Realized Gains/Losses	0.00
Period Unrealized Gains/Losses	2,039.28
Interest Income	0.00
Dividend Income	0.00
Management Fee	0.00
Ending Market Value	428,245.81
Total Gain after Management Fees	2,039.29
Money Weighted Return %	0.48
Time Weighted Return %	0.48

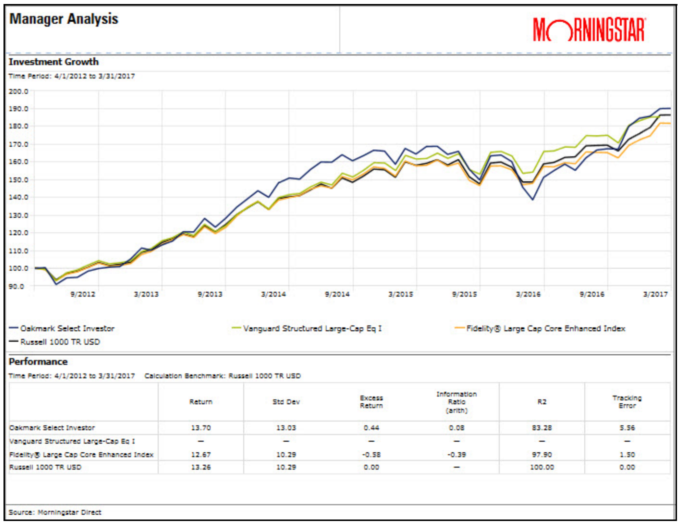
Portfolio Asset Allocation

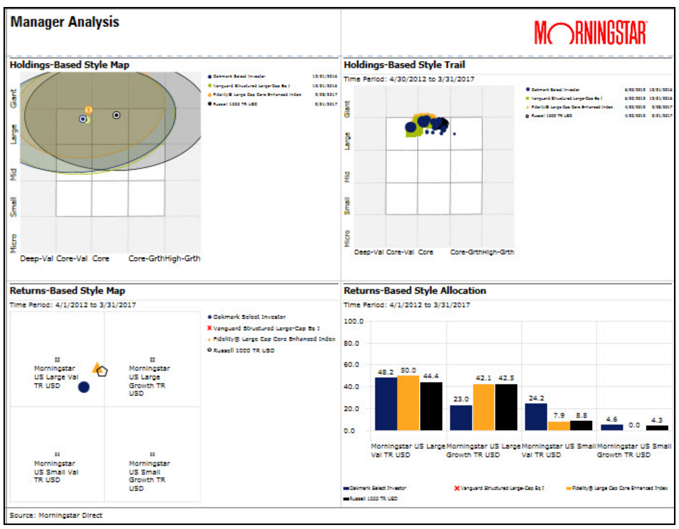
Portfolio Date: 3/31/2018

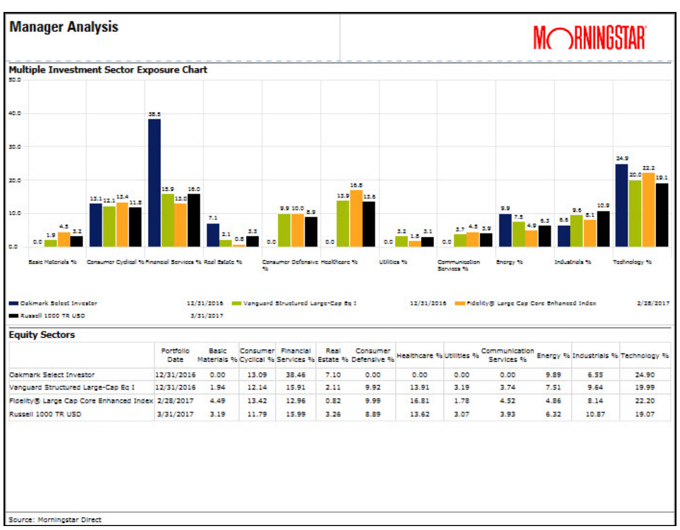
	% Assets	Market Value
Cash	2.99	12,808.93
Equity	94.08	402,881.37
Fixed Income	2.91	12,457.20
Not Classified	0.00	0.00
Other	0.02	98.33

company name

A report can contain many pages, and each page can have a different layout.







The three pages shown here are all from a single Presentation Studio workbook

Creating a Template

Overview

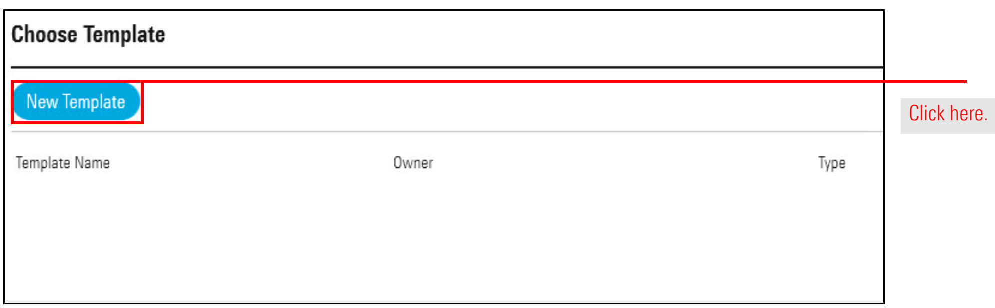
The section helps you understand how to create a template.

Exercise 2: Create a template

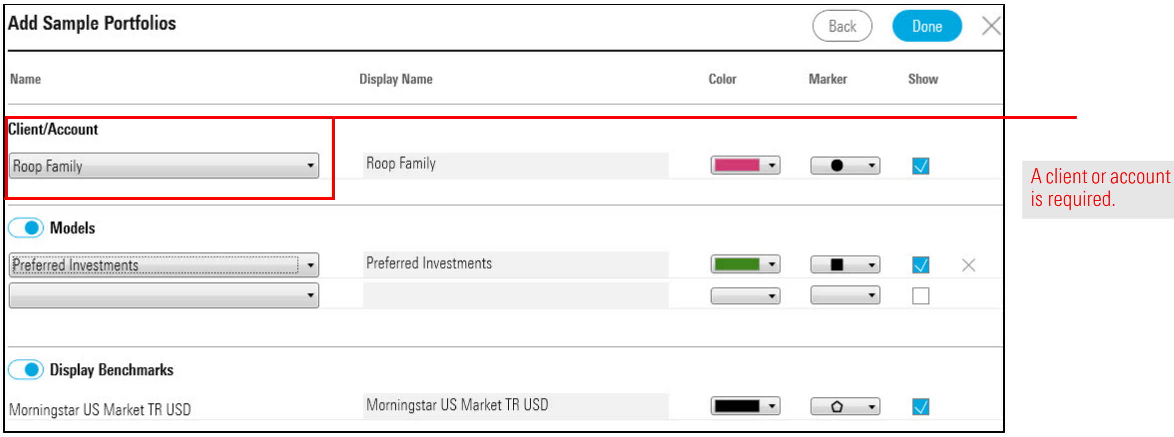
To create a template, do the following:

1. On the Presentation Studio Home page, click the **Portfolio** tile. The Choose Template dialog box opens.

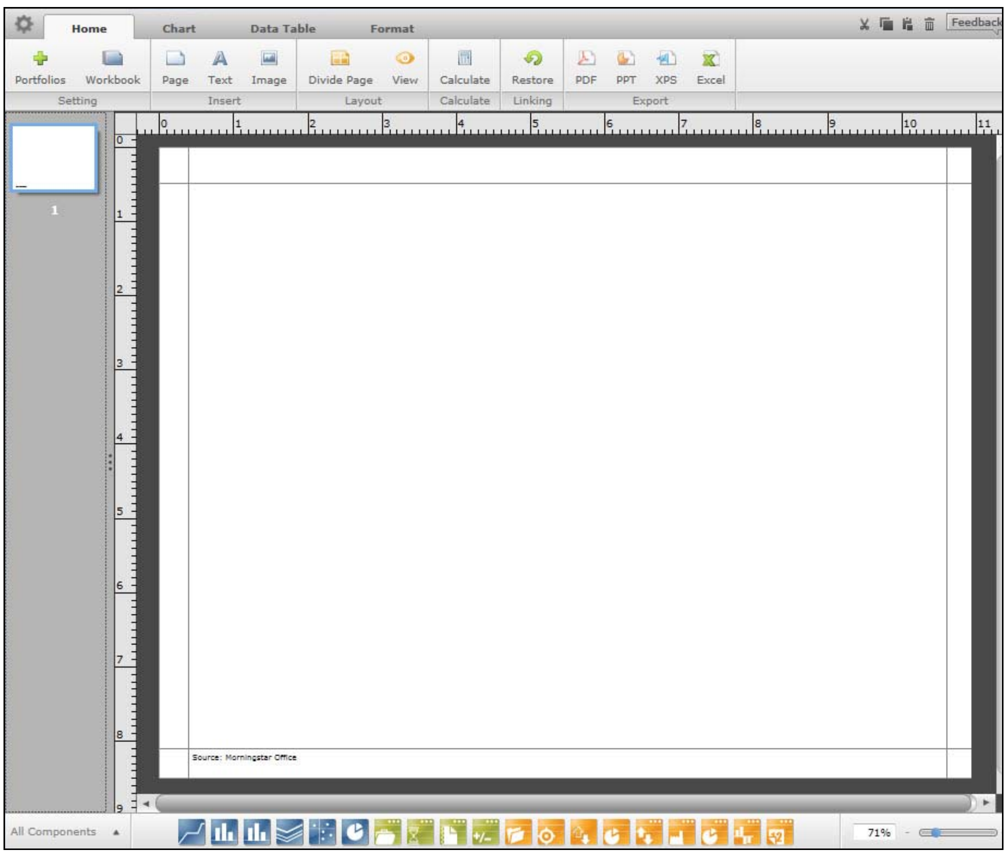
2. Because you haven't yet created a template, your only option is to click **New Template**. The Add Sample Portfolios dialog box opens.



3. From the **Client/Account** menu, select **one of your clients or accounts**.
4. If you want to compare a model portfolio to the client or account, make sure the **Models** toggle is in the **On** position, then from the **Models** menu, select at least **one model portfolio**.



5. Click **Done**. An untitled portfolio report opens.



A blank Presentation Studio file opens.

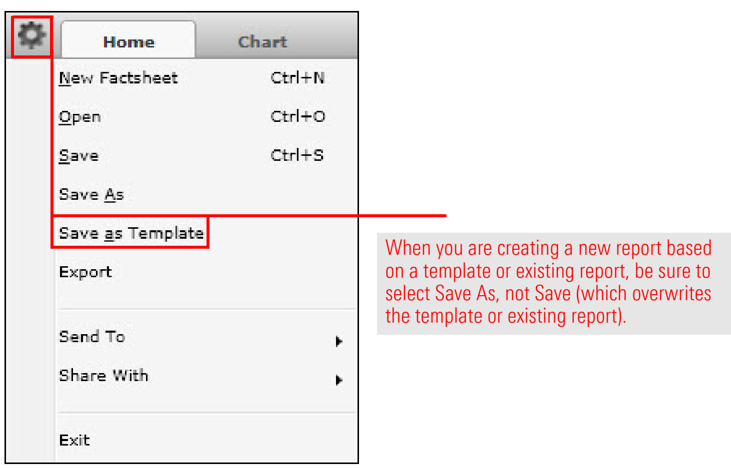
The charts available in this template are as follows:

- Multiple Investment Growth
- Calendar Returns Bar Chart
- Trailing Returns Bar Chart
- Rolling Window Chart
- X/Y Scatter Plot
- Pie Chart
- Morningstar Style Box, and
- Multiple Sector Exposure Chart.

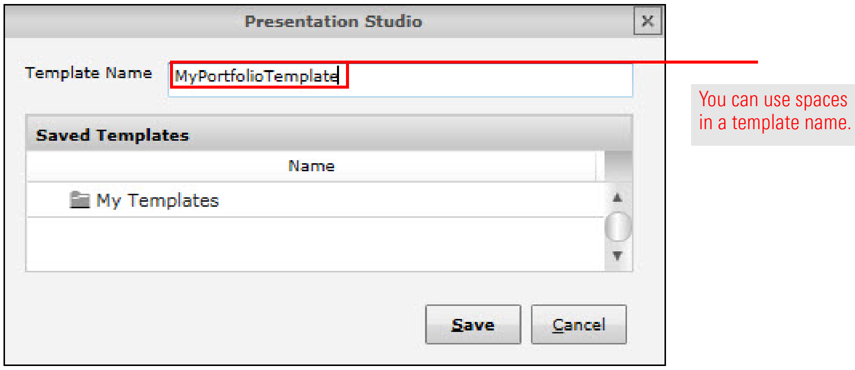
The tables available in this template are as follows:

- Portfolio Evaluation
- Portfolio Period Performance
- Transaction Ledger
- Realized Gain/Loss
- Performance by Account
- Portfolio Performance Summary
- Comparative Performance
- Asset Allocation
- Security Performance
- Security Equity Sector
- Security Asset Allocation
- Security Trailing Returns, and
- Security Calendar Return.

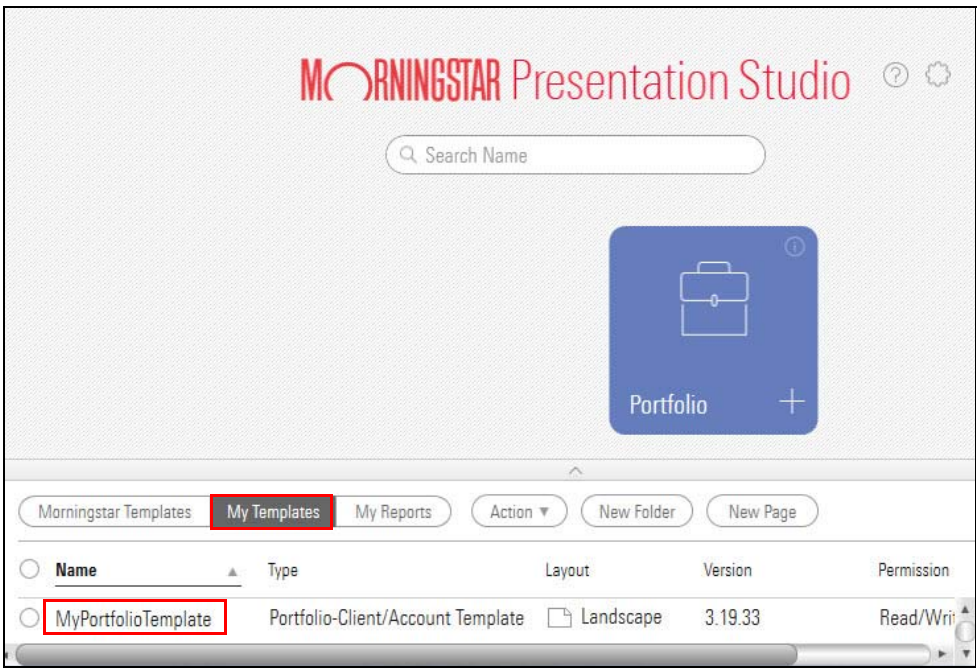
6. At the top-left corner of the window, click the **gear** icon and from the menu, select **Save As Template** to save your work as a template, which you can use as the basis for future portfolio reports. A dialog box opens.



7. In the **Template Name** field, type **MyPortfolioTemplate**, then click **Save**.



The template is stored in the My Templates folder and listed on the Presentation Studio Home Page when My Templates is selected.



Creating a Page Layout

Overview

This section guides you as you do the following:

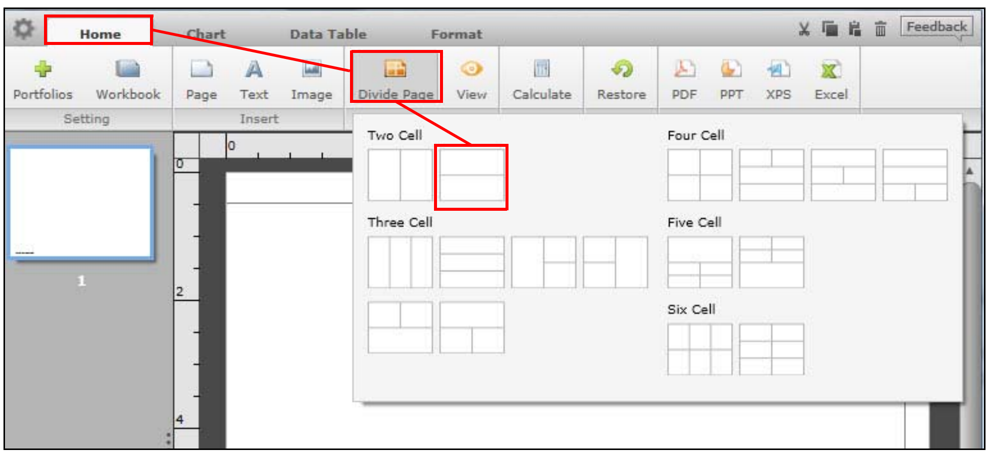
- create a page layout (page 17)
- insert a component into a cell (page 21), and
- add a page to a report (page 20).

Exercise 3: Create a page layout

The only page in your template currently consists of one large cell, which is fine if you want to use a large component or a table component requiring a full page. But in most cases, you want the page to contain multiple cells.

Do the following:

1. Select the **Home** tab, click the **Divide Page** icon, and select the right **Two Cell** option.



The Two Cell options divide the page into two cells of equal width.

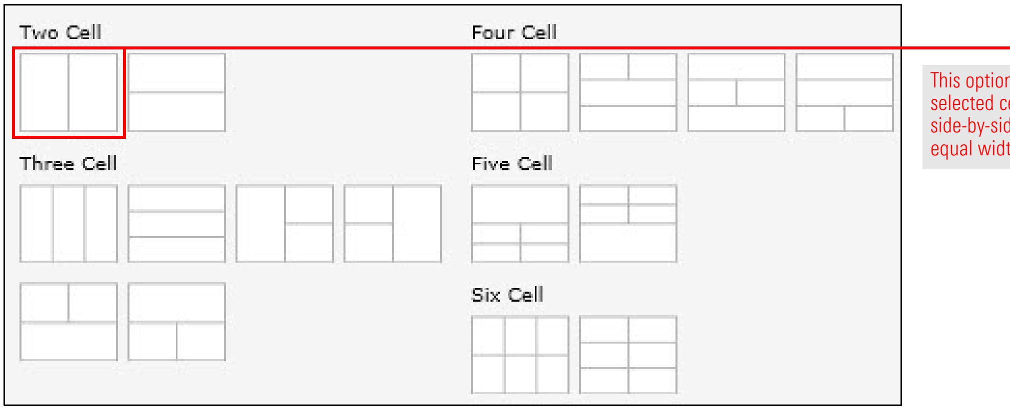
The page is now divided into two cells.

Note that the top cell is selected.

2. Click the **Bottom cell** to select it.

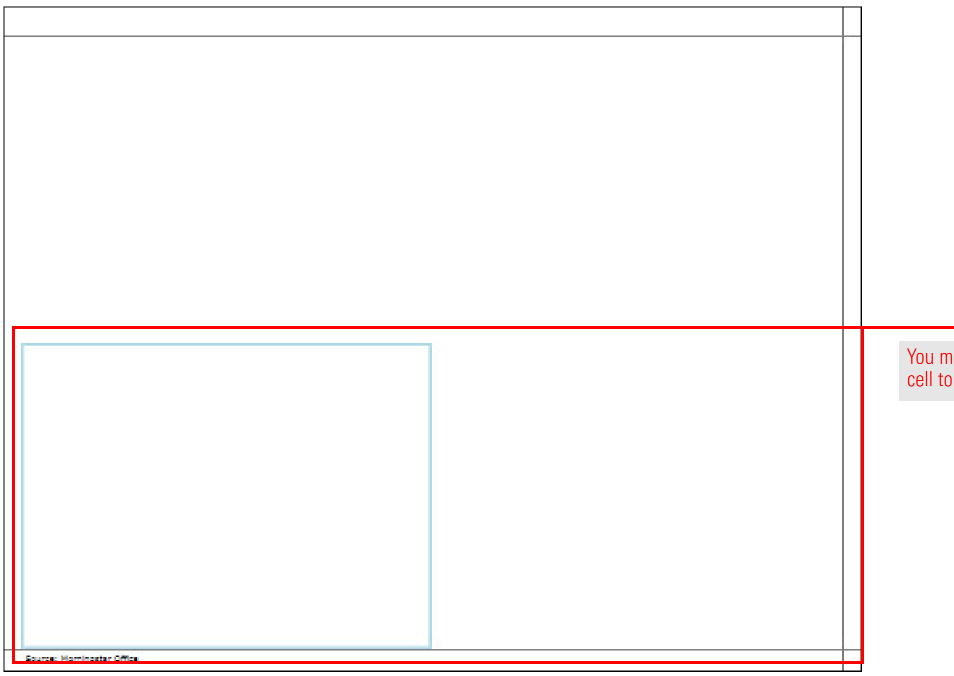
A selected cell displays a blue border.

3. On the **Home** tab, click the **Divide Page** icon and select the left **Two Cell** option.



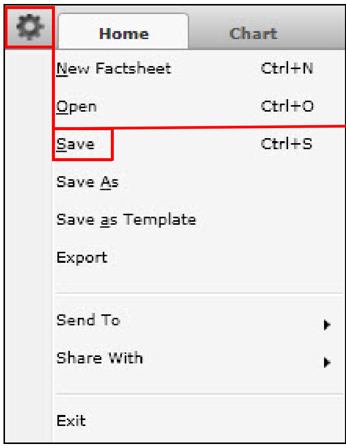
This option divides the selected cell into two side-by-side cells of equal width.

The bottom cell is now divided into two cells.



You might need to click each cell to see the two cells.

4. To save your work, click the **Application Settings** icon at the top-left corner of the window and select **Save**.



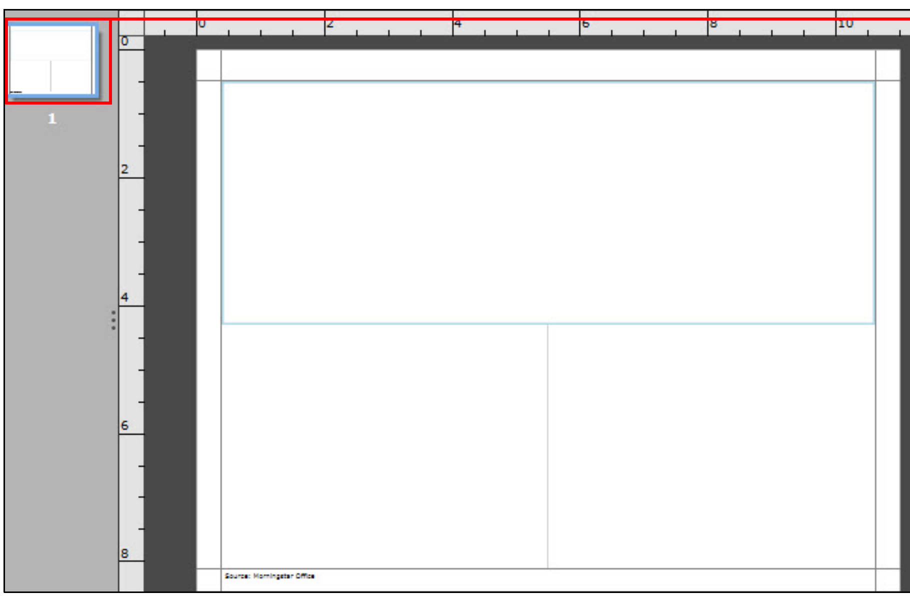
Be sure to save frequently.

Exercise 4: Create a new page

When you add a page to a report, you can choose to duplicate an existing page or create a blank page. The new page appears after the page selected in the Navigation pane.

To add a new blank page, do the following:

1. In the Navigation pane, click **an existing page** to select it.

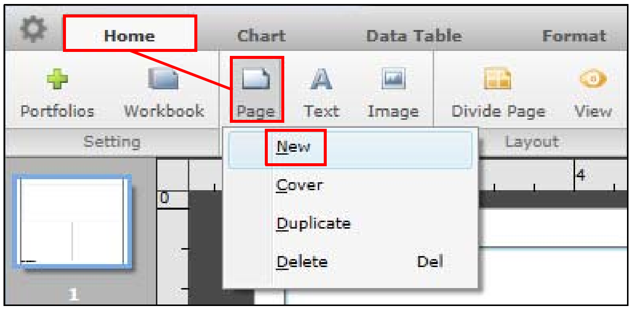


The selected page is outlined in blue.

2. On the Command bar, select the **Home** tab.

3. On the Home tab, click the **Page** icon and select **New**. A new blank page is created after the selected page.

   ☞ Note: If you select Duplicate, a copy of the selected page is created.



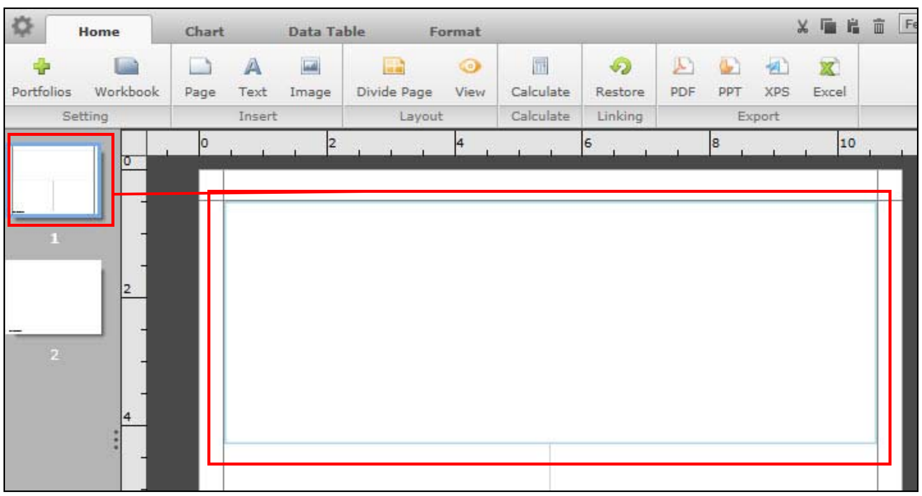
Note the highlighted selections.

Exercise 5: Insert a component into a cell

Inserting a component into a cell is a simple drag-and-drop action.

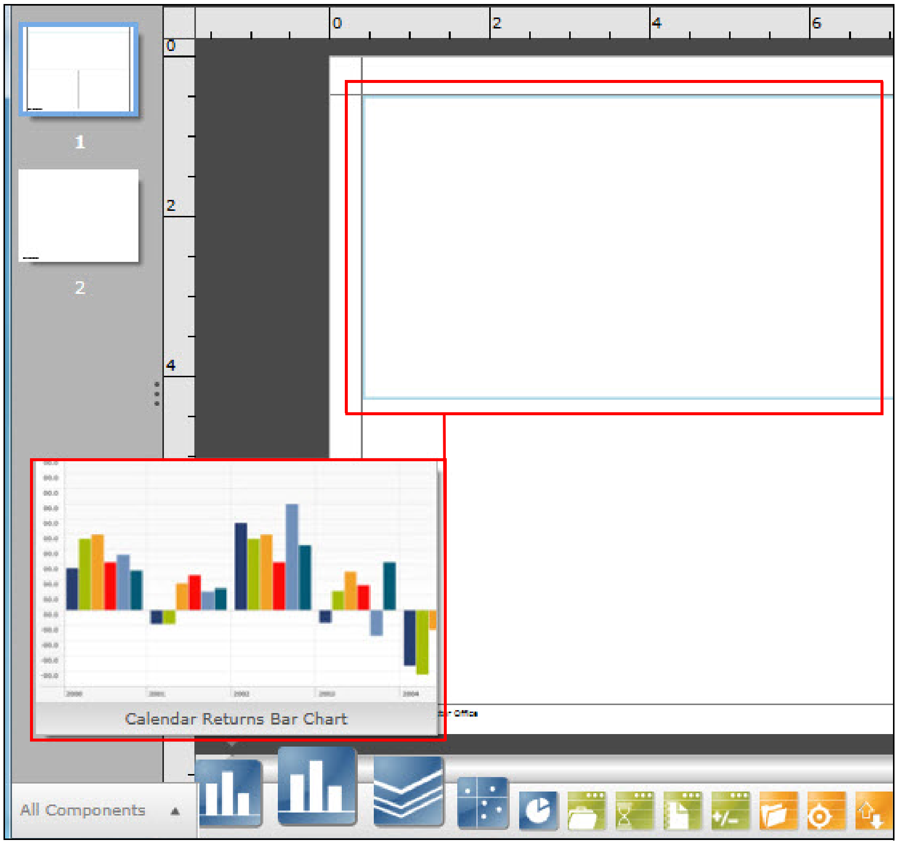
Do the following:

1. Select the **first page** of the template, then select the **top cell**.



Note the highlighted selections.

2. At the bottom of the window, on the Component Bar, drag a component into the empty cell.

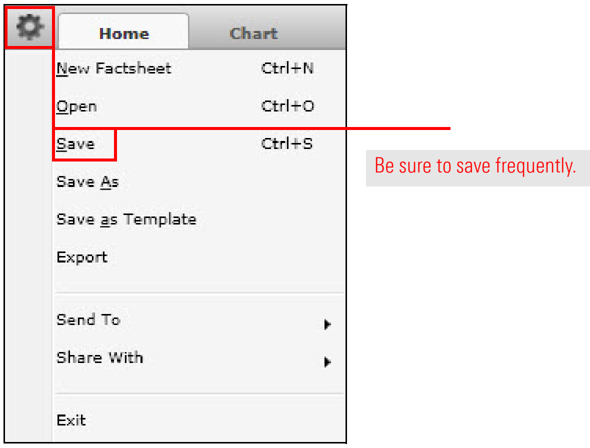


Drag the component to anywhere in the empty cell.

The page should now look something like this.

The component fills the cell.

3. Drag another component into the bottom-right cell.
4. **Save**.



Publishing a Presentation Studio Template

Overview

A Presentation Studio template can be used to generate reports in Morningstar Office Cloud.

Before you can use a template outside of Presentation Studio, the owner of the template (who might be you) must do the following:

- publish the template, and
- include yourself (or a group of which you are a member) among those the template is published to.

You need permission to publish a Presentation Studio template. If you cannot complete the steps in Exercise 6 on page 25, contact your Customer Success Manager.

This section describes how to publish a Presentation Studio template.

In this section, you will learn how to do the following:

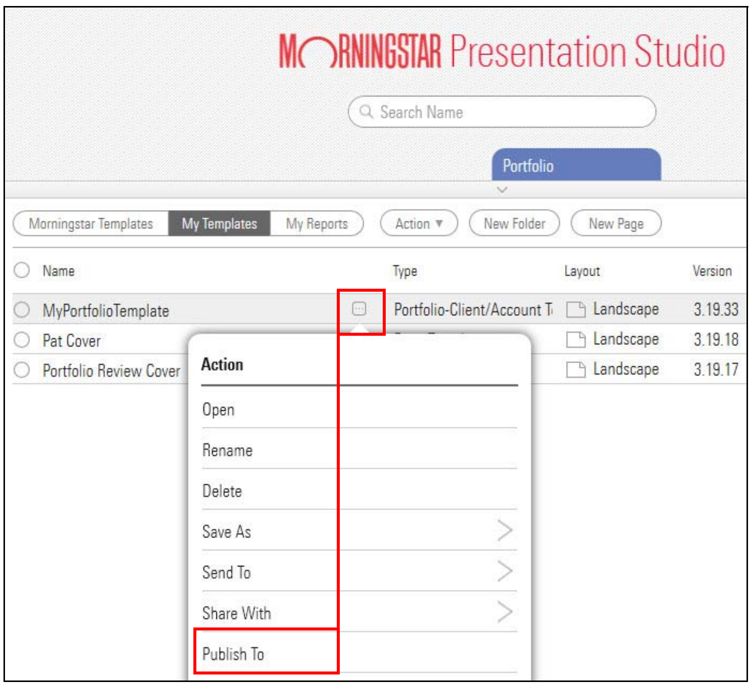
- publish a Presentation Studio template (page 25), and
- use a template to generate a report (page 27).

Exercise 6: Publish a Presentation Studio template

You can publish your templates to yourself, selected users, or all users at your firm. Do the following:

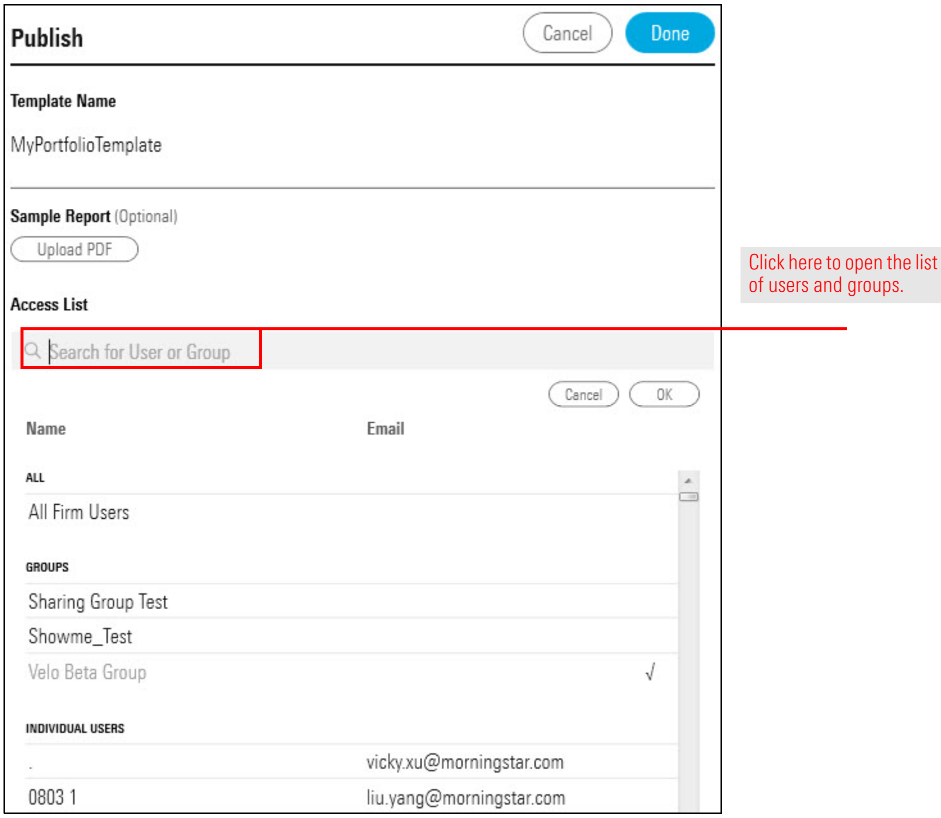
1. On the Morningstar Presentation Studio Home page, click **My Templates**.
2. **Hover the cursor** over the row displaying the name of the template you want to publish. The Action icon is displayed.
3. Click the **Action** icon and from the Action menu, select **Publish To**.

☞ Note: If Publish To is not an option on the Action menu, you do not have permission to publish templates. Contact your Customer Success Manager.



Note the highlighted selections.

4. Click in the **Search for User or Group** field. A list of your firm's Presentation Studio users is displayed.



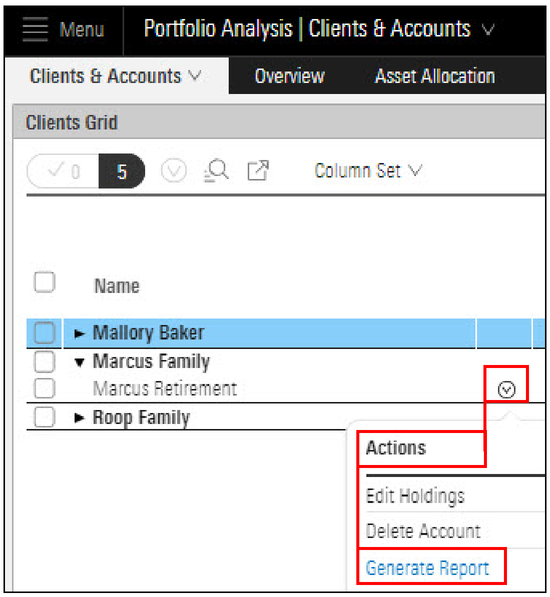
5. Select the **users** or **groups** who need access to the template. Be sure to include yourself.
6. At the top of the list, click **OK**, then at the top of the Publish window, click **Done**. An alert opens, informing you that the template has been published.
7. Click **OK**.

Exercise 7: Use a template to generate a portfolio report

In this exercise, you will use your template to generate a portfolio report in Morningstar Office Cloud.

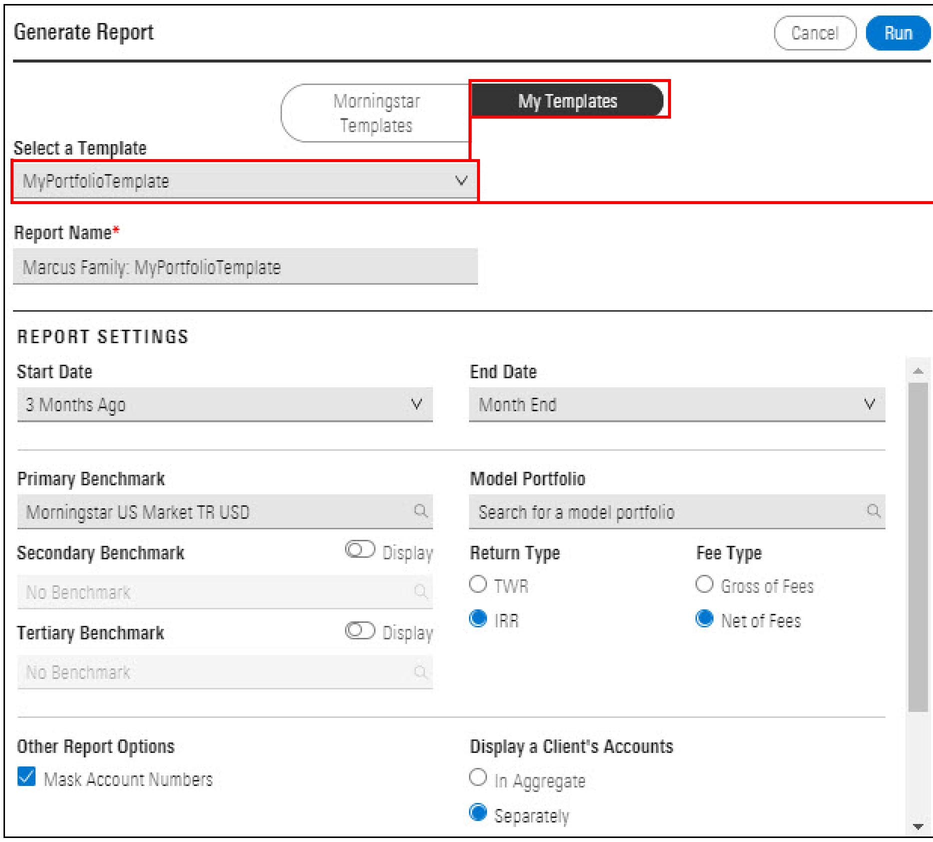
Do the following:

1. Launch **Morningstar Office Cloud**.
2. In the Clients & Accounts workbook, display the **Clients Grid**.
3. Select **an account**.
4. In the row of the client or account you want a report on, click the **Actions** icon. The Actions menu opens.
5. From the **Actions** menu, select **Generate Report**. The Generate Report window opens.



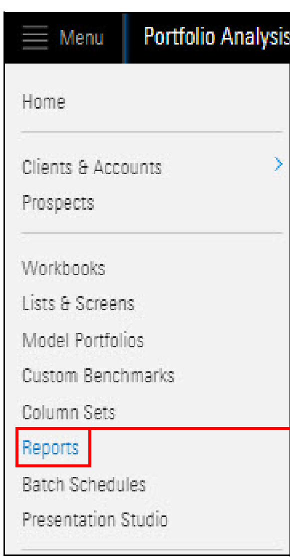
Note the highlighted selections.

6. Select **My Templates**.
7. From the **Select a Template** drop-down field, select a **template**.



Templates published to you are available from this drop-down field.

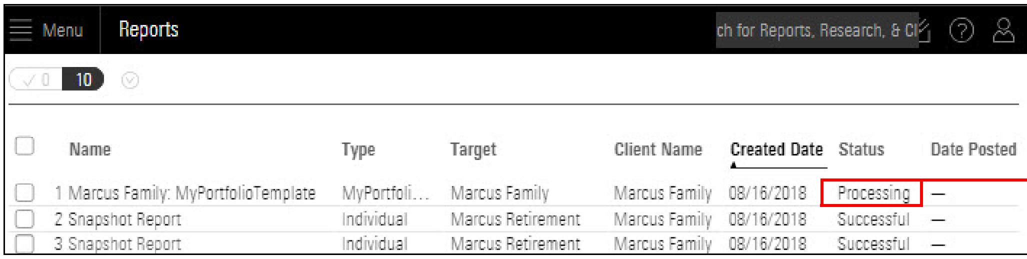
8. **Scroll down** and select **options** from the Report Settings area.
9. Click **Run**. The window closes and an alert opens, informing you that the reports are being generated.
10. From the **Menu**, select **Reports**. The Reports page opens.



Click here to view your reports.

11. Your most recent report is shown at the top of the list. Check your report's **status**. It may say Processing. Wait until it says Successful, then click the **name of the report**. The report opens in a new browser tab or window.

    ☞ Note: From the report's Action drop-down field, you can publish your report to the Client Web Portal.



	Name	Type	Target	Client Name	Created Date	Status	Date Posted
☐	1 Marcus Family: MyPortfolioTemplate	MyPortfoli…	Marcus Family	Marcus Family	08/16/2018	Processing	—
☐	2 Snapshot Report	Individual	Marcus Retirement	Marcus Family	08/16/2018	Successful	—
☐	3 Snapshot Report	Individual	Marcus Retirement	Marcus Family	08/16/2018	Successful	—

The Status options are Processing, Successful and Failed.

A page from a successful report is shown here.

Portfolio Performance Summary

Time Period: 1/1/2018 to 3/31/2018

Beginning Market Value	426,206.52
Additions	0.00
Withdrawals	0.00
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Period Unrealized Gains/Losses	2,039.28
Interest Income	0.00
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Time Weighted Return %	0.48

Portfolio Asset Allocation

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