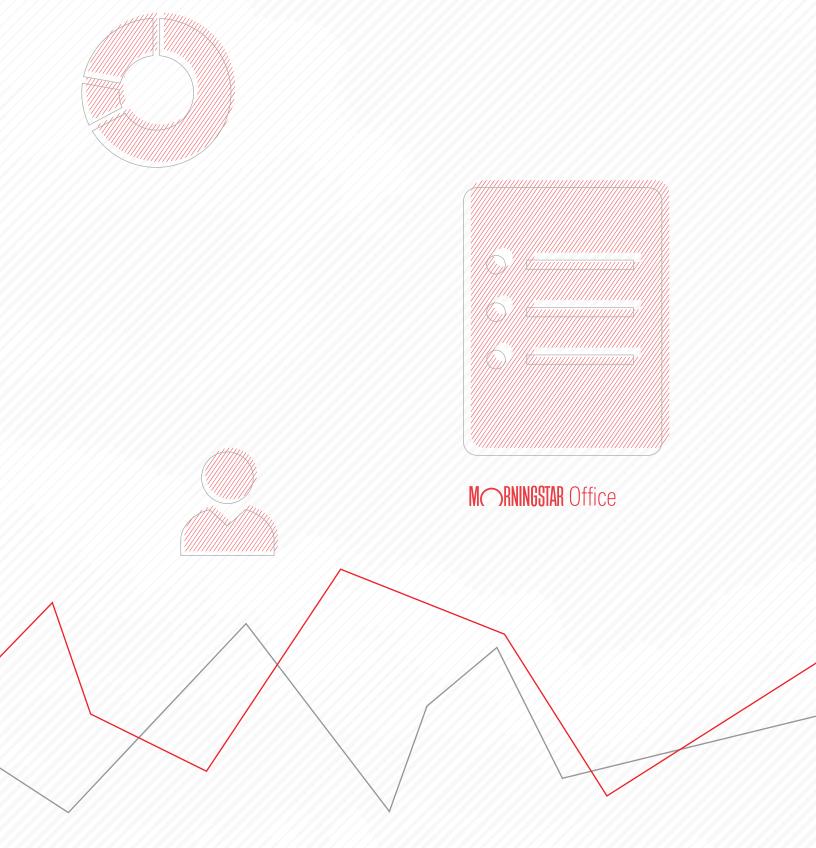
Using Presentation Studio



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Introduction to Presentation Studio

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.

Overview

MORNINGSTAR Portfolio Growth - Since In Time Period: 2/5/2016 to 3/31/2018 Time Period: 2/6/2016 to 3/31/2018 460,000.0 75.0 67.5 440,000.0 60.0 420,000.0 52.5 400,000.0 45.0 380,000.0 37.5 30.0 360,000.0 22.5 340,000.0 15.0 320,000.0 7.5 300,000.0 280.000.0 -7. 9/2016 3/2018 9/2016 3/2017 9/2017 3/2018 3/2017 Client -Client -Benchmark 2 Portfolio Performance Sur Portfolio As Time Period: 1/1/2018 to 3/31/2018 Portfolio Date: 3/31/2018 ing Market Value 426,206.52 Market Value 0.00 2.95 12,808.93 Period Realized Gains/Losses 0.00 Equity 94.08 402,881.37 2.91 12,457.20 0.00 Not Class Othe 0.02 98.33 and Inc 0.00 fanagement Fee 0.00 428,245.81 in after Mana 2,039.29 ahted Ret m % 0.48 nd Return 0.45

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

This guide describes the following topics:

- Understanding Presentation Studio Terminology (page 5)
- Downloading and Installing Presentation Studio (page 6)
- ► Understanding the Capabilities of Presentation Studio (page 8)
- Creating a Template (page 13)
- Creating a Page Layout (page 17)
- Publishing a Presentation Studio Template (page 24)

Understanding Presentation Studio Terminology

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

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

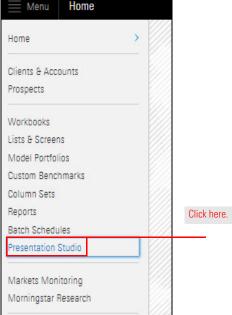
| Term | Definition |
|-----------|---|
| Report | A report is a document reflecting information for a specific client Save as a report when you create your report for specific client and manage your report directly from Presentation Studio. You cannot publish a report to Morningstar Office Cloud. |
| 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. |

Overview

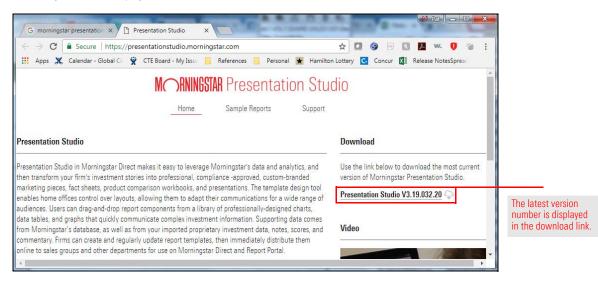
What Presentation Studio terminology do I need to know?

Downloading and Installing Presentation Studio

| In this section, you will learn how to download and install Presentation Studio. | Overview |
|---|--|
| Presentation Studio is a standalone tool, separate from other Morningstar products. In this exercise, you will learn how to download and install Presentation Studio. | Exercise 1: 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. | |
| | |



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

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|------------------------------|------------------------------------|-------------|---------|---|
| | MCORNINGSTAR Presentat | tion Studio | 00 | |
| | | | | F |
| | Porti | iolio + | | |
| Morningstar Templates My Tel | mplates My Reports New Page | | | |
| Name | Түре | Layout | Version | |
| | | | Q | |

Understanding the Capabilities of Presentation Studio

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).

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

What can I do on the Presentation Studio Home page?

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

| M | Presentation Studio | M RNINGSTAR Prese | entation Studio | | ■ × | A. Application Settings |
|---|----------------------|-------------------------------------|-----------------|--------|-----|-------------------------|
| | | Q Search Name | | | | B. Portfolio |
| | | | Portfolio + | | | |
| | | | | | | C. Minimize bar |
| | Morningstar Template | es My Templates My Reports New Page | | | | o. Withinize bai |
| | Name | Туре | Layout | Versio | n | |
| | | | | | | |

- 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.

| Presentation Studio | | |
|--|----|--|
| M RNINGSTAR Presentation Studio | 00 | |
| Q Search Name | | If the top portion of the Home page is minimized (shown here), click the |
| Portfolio | | Minimize bar maximize it |
| Morningstar Templates My Templates My Reports New Page | | |

| Presentation Studio | × |
|---|------------------------------------|
| Constant Presentation Studio Constant Studio Constant State Constate Constant State Constate Constant State Const | > |
| Portfolio + | |
| Morningstar Templates My Templates My Reports New Page | |
| Name Type Layout Version | D. Toggle |
| | E. List of templates or reports |
| | |

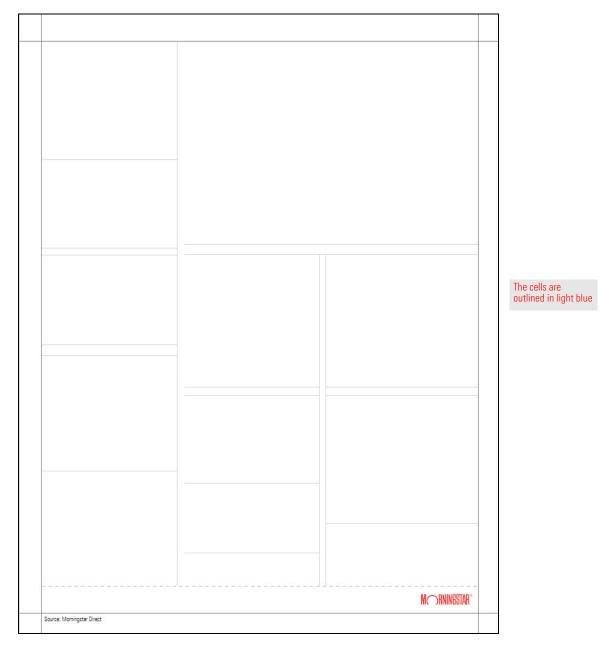
- D. On the toggle, click Morningstar Templates to display a list of Morningstar Templates.
 - Note: Initially, your Home page shows no reports or templates. Those lists will populate as you create reports and templates.
- E. The list reflects the selection on the toggle. From the list, you can do the 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.

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.

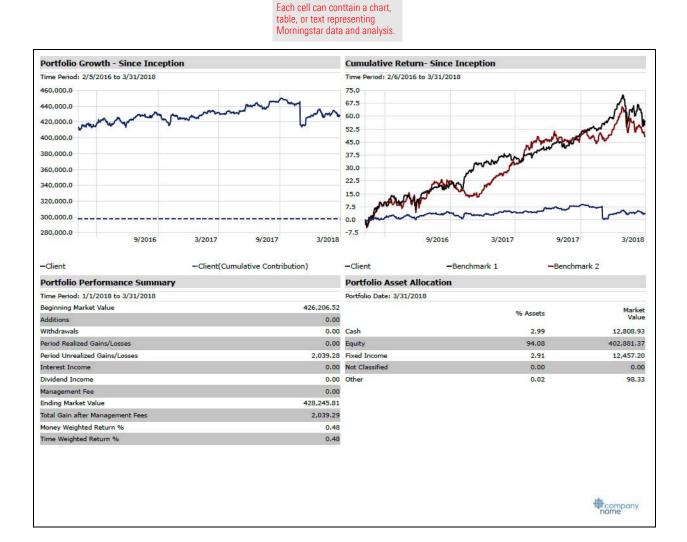
What can I create in Presentation Studio?

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.

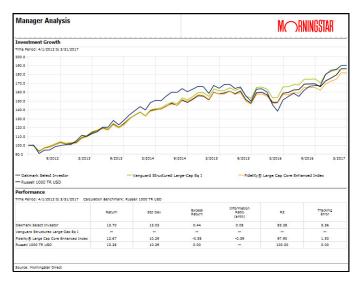
For instance, you can have a page divided into sections and laid out like this:

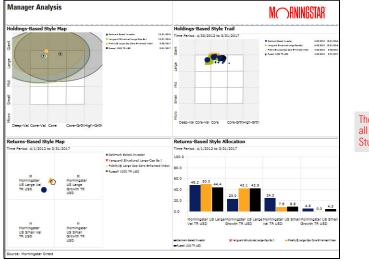


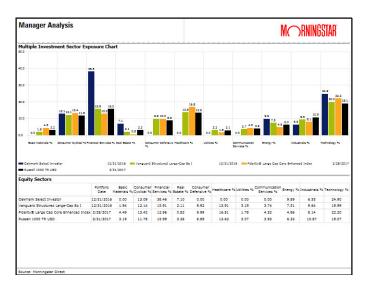
With a few clicks, you can populate it with data and Morningstar research content, so it looks like this:



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 The section helps you understand how to 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.

| RNINGSTAR Pres | sentation Studio | 0 0 |
|-----------------------|------------------|----------|
| Q Search Name | | |
| | | Click he |
| | Portfolio + | |

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

| Choose Template | | | |
|-----------------|-------|------|-------------|
| New Template | | | Click here. |
| Template Name | Owner | Түре | |
| | | | |
| | | | |

Exercise 2: Create

a template

Overview

13

- 3. From the Client/Account menu, select one of your clients or accounts.
- 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.

| Add Sample Portfolios | | | Back | Done X | |
|---|------------------------------|-------|--------|--------|----------------------------------|
| Name | Display Name | Color | Marker | Show | |
| Client/Account Roop Family | Roop Family | • | | V | A client or account is required. |
| Models Preferred Investments | Preferred Investments | • | • | ✓ × | io required. |
| Display Benchmarks Morningstar US Market TR USD | Morningstar US Market TR USD | | • | ✓ | |

5. Click Done. An untitled portfolio report opens.

| Home | 2 | Chart | | Data Ta | able | Format | | | | | | | | | X 🖬 ii | Î | Feedback |
|----------------|--------|-------|--------------|----------------|-------------|--------|-----------|---------|-----|-----|--------------|-------|-------|------|--------|---|----------|
| ÷ | | | A | | | 0 | | \$ | Ð | | | X | | | | | |
| | rkbook | Page | Text | Image | Divide Page | | Calculate | Restore | PDF | PPT | XPS | Excel | | | | | |
| Setting | | 1 | Insert | (| Layo | | Calculate | Linking | | | port | | | | | | |
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| | 4 | | | | | | | | | | | | | | | | |
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| | 5 - | | | | | | | | | | | | | | | | |
| | 11111 | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| | 6 - | | | | | | | | | | | | | | | | |
| | 11111 | | | | | | | | | | | | | | | | |
| | - | | | | | | | | | | | | | | | | |
| | 7 - | | | | | | | | | | | | | | | | |
| | 11111 | | | | | | | | | | | | | | | | |
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| | 8 - | | | | | | | | | | | | | | | | |
| | | 5 | iource: Morr | ningstar Offic | • | | | | | | | | | | | | |
| | - | | | | | | | | | | | | | | | | |
| | 9 - 4 | | | | | | | _ | | | | | | | | |)+ |
| All Components | | - | / III | 1h 😹 | - · · · C | | +/- | 0 | 4 | 6 1 | | C | 4, 52 | | 71% | | |

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.
- 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.

| Home | Chart | |
|--------------------------|--------|---|
| New Factsheet | Ctrl+N | |
| <u>O</u> pen | Ctrl+O | |
| <u>S</u> ave | Ctrl+S | |
| Save <u>A</u> s | | |
| Save <u>a</u> s Template | | When you are creating a new |
| Export | | on a template or existing repo select Save As, not Save (which the template or existing repor |
| Send To | • | the template of existing repor |
| Share With | • | |
| Exit | | |

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

| Presentation Studio | × |
|-----------------------------------|--|
| Template Name MyPortfolioTemplate | |
| Saved Templates | You can use spaces in a template name. |
| Name | |
| 🚔 My Templates 🔺 | |
| | |
| | |
| Save Cancel | |
| | |

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

| | | Search Name | | |
|---------------------|-------------------------|-----------------------|-------------------|--|
| | | Poi | tfolio + | |
| | | ^ | | |
| | | | | |
| Morningstar Templat | es My Templates My Repo | rts Action 🔻 New Fold | der) (New Page) | |

Creating a Page Layout

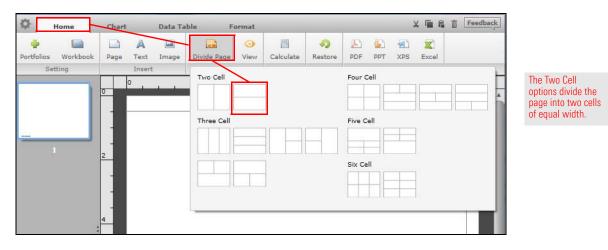
This section guides you as you do the following:

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

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.

Exercise 3: Create a page layout

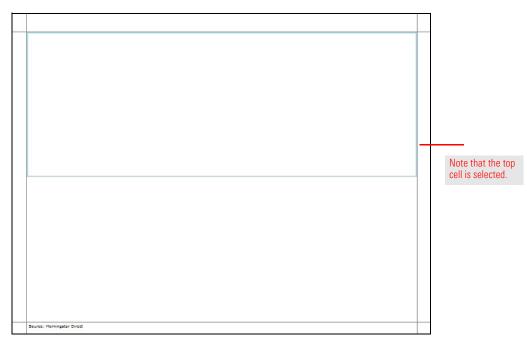
Do the following:



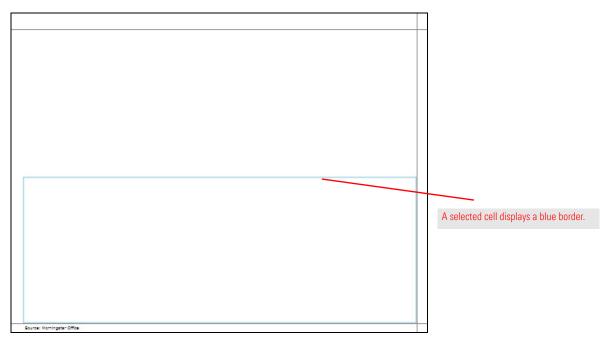
1. Select the **Home** tab, click the **Divide Page** icon, and select the right **Two Cell** option.

Overview

The page is now divided into two cells.



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



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

| Two Cell | Four Cell | |
|------------|-----------|--|
| | | This option divides the selected cell into two side-by-side cells of equal width. |
| Three Cell | Five Cell | |
| | | |
| | Six Cell | |
| | | |
| | | |

The bottom cell is now divided into two cells.

| |] |
|--------------------------|---|
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | You might pood to plick cook |
| | You might need to click each cell to see the two cells. |
| | |
| | |
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| | |
| | |
| | |
| Secret Memioreter Office | - |

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

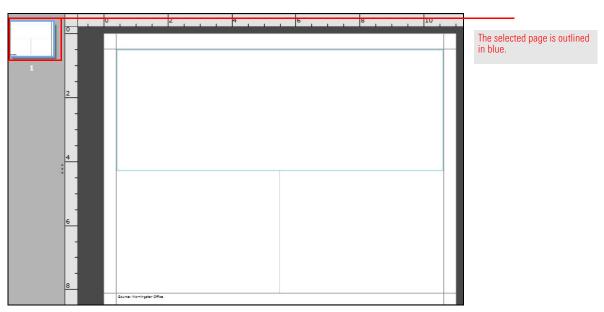


When you add a page to a report, you can choose to duplicate an existing page or create a blank page. The new page appears after the page selected in the Navigation pane.

Exercise 4: Create a new page

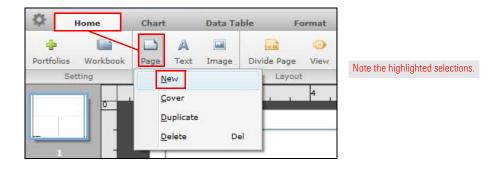
To add a new blank page, do the following:

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



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.
 - Pote: If you select Duplicate, a copy of the selected page is created.



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

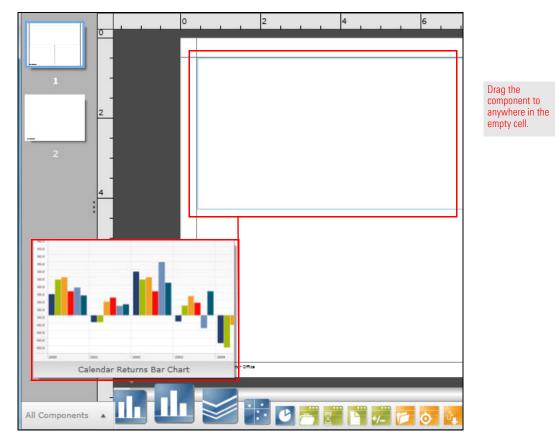
Do the following:

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

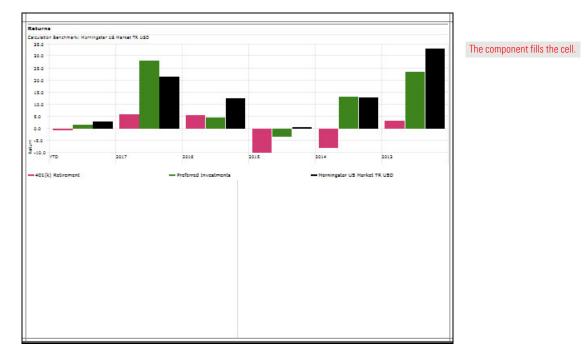
Exercise 5: Insert a component into a cell

\$ x 🖬 🛍 🛍 Home Chart Data Table Format + 1 A 0 5 D 6 lad. X Portfolios Workbook Page Text Image Divide Page View Calculate Restore PDF PPT XPS Excel Export Calculate Linking Setting Insert Layout 10 2 4 8 6 Note the highlighted selections.

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



The page should now look something like this.



3. Drag another component into the bottom-right cell.

4. Save.

| Home | Chart | |
|--------------------------|--------|----------------------------|
| <u>N</u> ew Factsheet | Ctrl+N | |
| <u>O</u> pen | Ctrl+O | |
| <u>S</u> ave | Ctrl+S | |
| Save <u>A</u> s | | Be sure to save frequently |
| Save <u>a</u> s Template | | |
| Export | | |
| Send To | | |
| Share With | • | |
| Exit | | |

Publishing a Presentation Studio Template

A Presentation Studio template can be used to generate reports in Morningstar **Overview** 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).

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.

Exercise 6: Publish a Presentation Studio template

| | | Q Search Name | | | |
|--------------------------|---------------------|--------------------------|-----------------|---------|--------------------------------|
| | | Portfo | lio | | |
| Morningstar Templates N | Ny Templates My Rep | | er New Page | | |
| O Name | | Туре | Layout | Version | |
| O MyPortfolioTemplate | | Portfolio-Client/Account | t T 🕒 Landscape | 3.19.33 | Note the highlighted selection |
| O Pat Cover | | | 🕒 Landscape | 3.19.18 | |
| O Portfolio Review Cover | Action | | Landscape | 3.19.17 | |
| | Open | | | | |
| | Rename | | | | |
| | Delete | | | | |
| | Save As | > | | | |
| | Send To | > | | | |
| | Share With | > | | | |
| | Publish To | | | | |

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

| Publish | | Cancel Done | |
|----------------------------|--------------|---------------|--|
| Template Name | | | |
| MyPortfolioTemplate | | | |
| Sample Report (Optional) | | | |
| Upload PDF | | | Click here to open the lis of users and groups. |
| Access List | | | or users and groups. |
| Q Search for User or Group | | | |
| | | Cancel OK | |
| Name | Email | | |
| ALL | | | |
| All Firm Users | | | |
| GROUPS | | | |
| Sharing Group Test | | | |
| Showme_Test | | | |
| Velo Beta Group | | √ | |
| INDIVIDUAL USERS | | | |
| | vicky.xu@mor | ningstar.com | |
| 0803 1 | liu.yang@moi | rningstar.com | |

- 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**.

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.

| <u></u> Menu | Portfolio An | alysis Clien | ts & Accounts | V |
|-------------------------|------------------------------|----------------|----------------|---------|
| Clients & Ac | counts ∨ | Overview | Asset Allocati | ion |
| Clients Grid | | | | |
| ✓ 0 5 | P 💿 | Colur | nn Set \vee | |
| | | | | |
| Nam | le | | | |
| | ory Baker | | | |
| | cus Family cus Retirement | | | \odot |
| □ ► Roop | o Family | | Actions | - (h) |
| | | | Edit Holdings | - |
| | | | Delete Accoun | t |
| | | | Generate Repo | irt |

Exercise 7: Use a template to generate a portfolio report

6. Select My Templates.

7. From the Select a Template drop-down field, select a template.

| Generate Report | | | Cance | | Run | |
|------------------------------------|--------------------------|------------------------|-----------------|--------|-------|--|
| Select a Template | Morningstar Templates | My Templates | | | | Templates published t you are available from this drop-down field. |
| | | • | | | | |
| Report Name* | | | | | | |
| Marcus Family: MyPortfolioTemplate | | | | | | |
| REPORT SETTINGS | | | | | 100 | |
| Start Date | | End Date | | | | |
| 3 Months Ago | V | Month End | | \vee | | |
| Primary Benchmark | | Model Portfolio | | | | |
| Morningstar US Market TR USD | Q | Search for a model p | ortfolio | Q | | |
| Secondary Benchmark | 🔘 Display | Return Type | Fee Туре | | | |
| No Benchmark | | O TWR | O Gross of Fees | | | |
| Tertiary Benchmark | 🔘 Display | IRR | Net of Fees | | | |
| No Benchmark | | | | | | |
| Other Report Options | | Display a Client's Act | counts | | | |
| Mask Account Numbers | | O In Aggregate | | | | |
| | | Separately | | | 22.00 | |

- 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.

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

| 🗮 Menu Reports Ch for Reports, Research, & Cl 🖞 ⑦ 🔗 📪 | | | | | | | | |
|---|--------------------------------------|------------|-------------------|---------------|--------------|------------|--------------|--|
| | 1 10 🛇 | | | | | | | The Status options are Processing, |
| | Name | Туре | Target | Client Name | Created Date | Status | Date Posted | Successful and Failed. |
| | 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 | 2 — 2 | |
| | 3 Snapshot Report | Individual | Marcus Retirement | Marcus Family | 08/16/2018 | Successful | | |



