

# Morningstar Office<sup>SM</sup> Cloud

## Release Notes January 29, 2019

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This document describes the new features and enhancements in Morningstar Office<sup>SM</sup> Cloud, as follows:

- ▶ [What does the Historical Drawdown component show me? \(page 1\)](#)
- ▶ [How can I use the Historical Drawdown component? \(page 2\)](#)
- ▶ [How can I identify Canadian Asset Allocations? \(page 5\)](#)
- ▶ [How can I delete reports from my workspace? \(page 5\)](#)
- ▶ [How can I organize my reports in folders? \(page 5\)](#)
- ▶ [How can I archive a report? \(page 6\)](#)
- ▶ [How can I opt in or out of CWP emails? \(page 6\)](#)
- ▶ [How can I adjust management fees? \(page 6\)](#)

### Overview

In an Investment Analysis workbook, the new Historical Drawdown component can help you analyze downside risk. By examining the drawdown line, you can understand the following occurrences over a selected time period:

- ▶ the number of drawdowns
- ▶ the duration of each drawdown, and
- ▶ the depth of each drawdown.

When working with the Historical Drawdown component, keep the following in mind:

- ▶ At this time, it can be used only for stocks and funds with historical return data. It does not apply to portfolio objects.
- ▶ The default start date is ten years ago and the default end date is the last month end, and
- ▶ A value of 0 indicates no losses during that time.

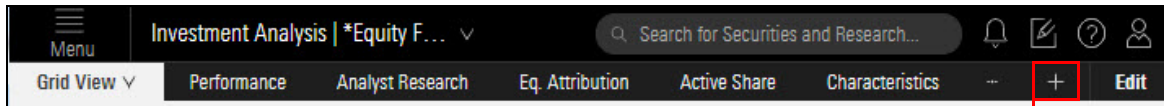
### What does the Historical Drawdown component show me?

The Historical Drawdown component does not appear by default on any existing worksheet in any workbook.

### How can I use the Historical Drawdown component?

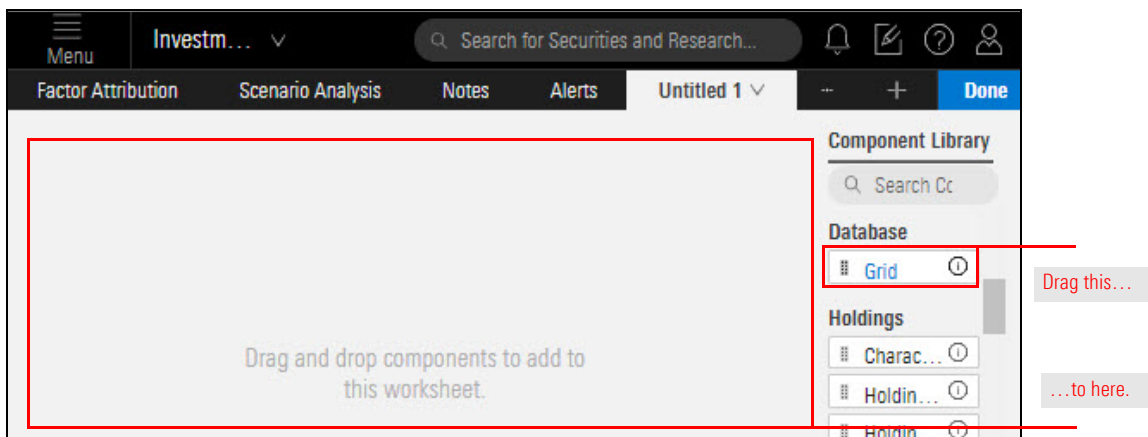
To use the Historical Drawdown component, do the following:

1. In an Investment Analysis workbook, create a new **worksheet**. An untitled worksheet opens and the Component Library opens.

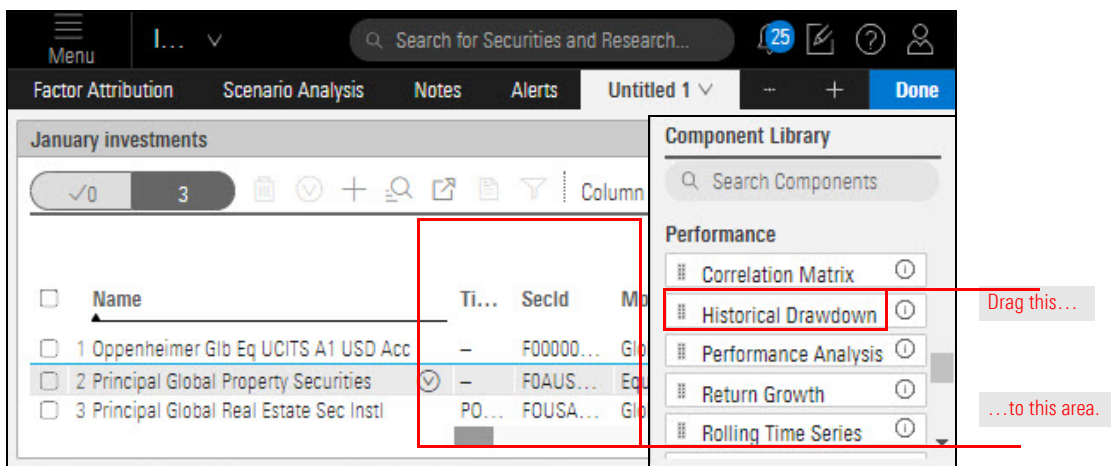


Click here to create a worksheet.

2. From the Component Library, **drag** the **Grid component** into the worksheet.

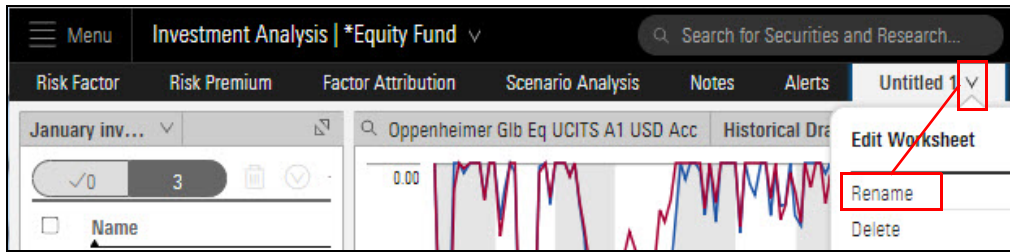


3. In the Component Library, **scroll down** to the **Risk Model** section. **Drag** the **Historical Drawdown component** into the worksheet to the right of the Grid.



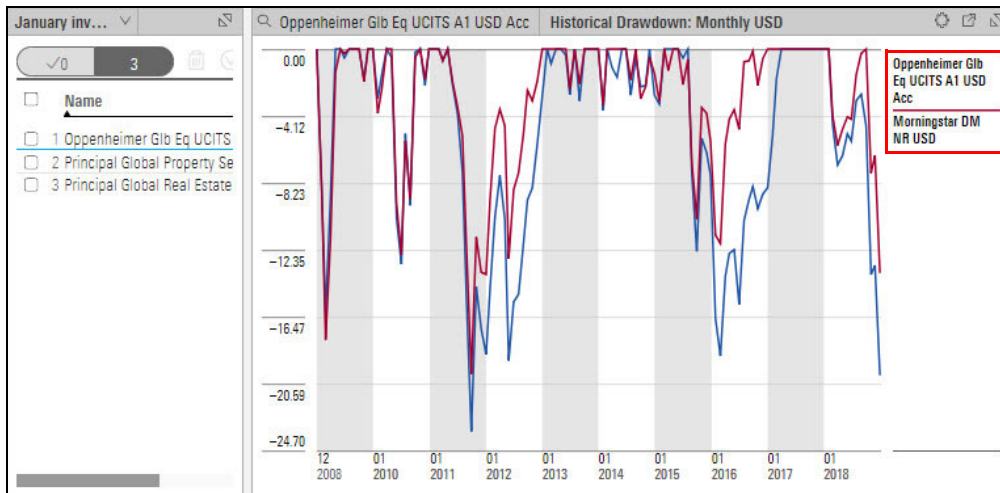
4. At the top of the Component Library, click **Done**.

- On the **Untitled 1** tab, click the **down arrow** and from the Edit Worksheet menu, select **Rename**.



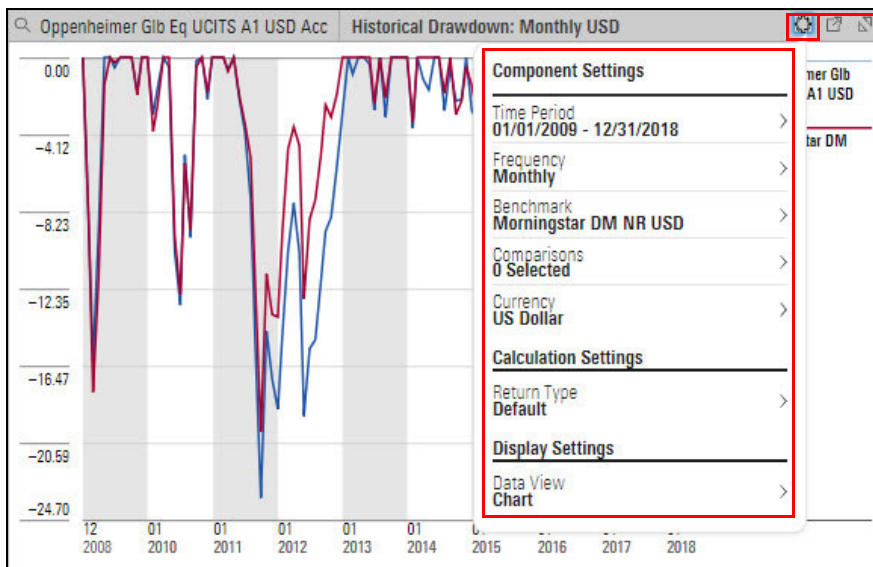
Note the highlighted selections.

- Name** the worksheet and click **Save**.
- Select an **investment** with historical return values.



Initially, the component displays data for the selected investment and its benchmark.

- Click the **Component Settings** icon. The Component Settings menu opens.

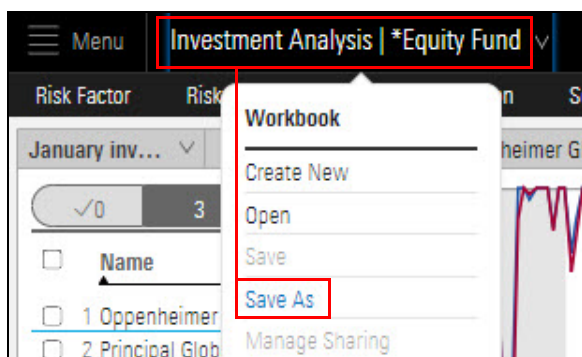


Note the highlighted selections.

The selections on the Component Settings menu are described in the following table:

Selection	Default	Submenu Options
Time Period	10 years ago to last month end	Start Date and End Date (These selections are reflected in the x-axis.)
Frequency	Monthly	Daily Monthly
Benchmark	By Relevancy > Best Fit	By Relevancy > Best Fit, Morningstar Category Average, and so on User Created > Custom Benchmarks, Model Portfolios, and Policy No Benchmark
Comparisons	0 Selected	Search securities (You can select up to 8 comparisons (9, if no benchmark is selected.))
Currency	US Dollar	All Morningstar-supported currencies (This selection is reflected in the y-axis.)
Return Type	Default	Default  ☞ Note: Some investment types map to specific return types (Default). For example, open-end funds use total returns; stocks, closed-end funds, and ETFs use market returns; and separate accounts use net returns.  Total Market Gross
Data View	Chart	Chart Table

9. After making your selections, **click away** from the Component Settings menu to close it.
10. To save the workbook with the worksheet you created, at the top of the window, click the **workbook name** and from the Workbook menu, select **Save As**.

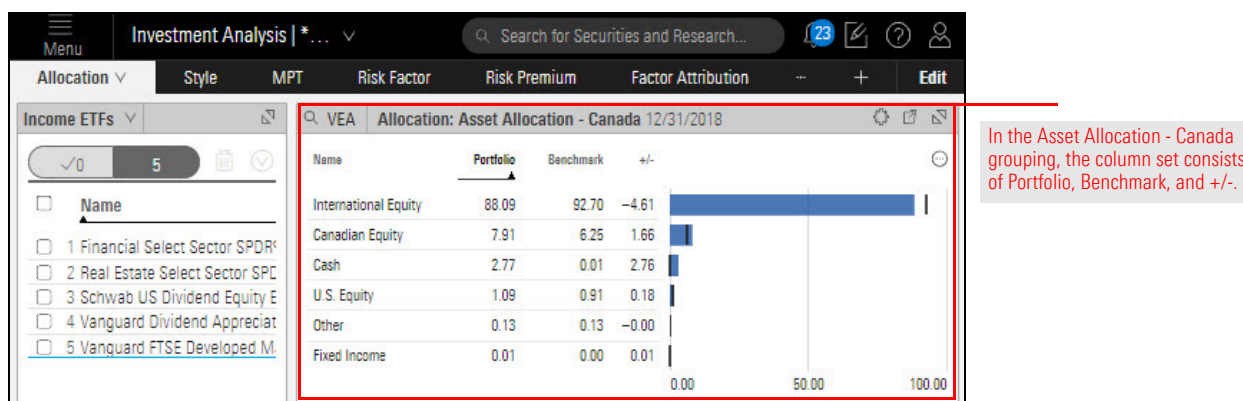
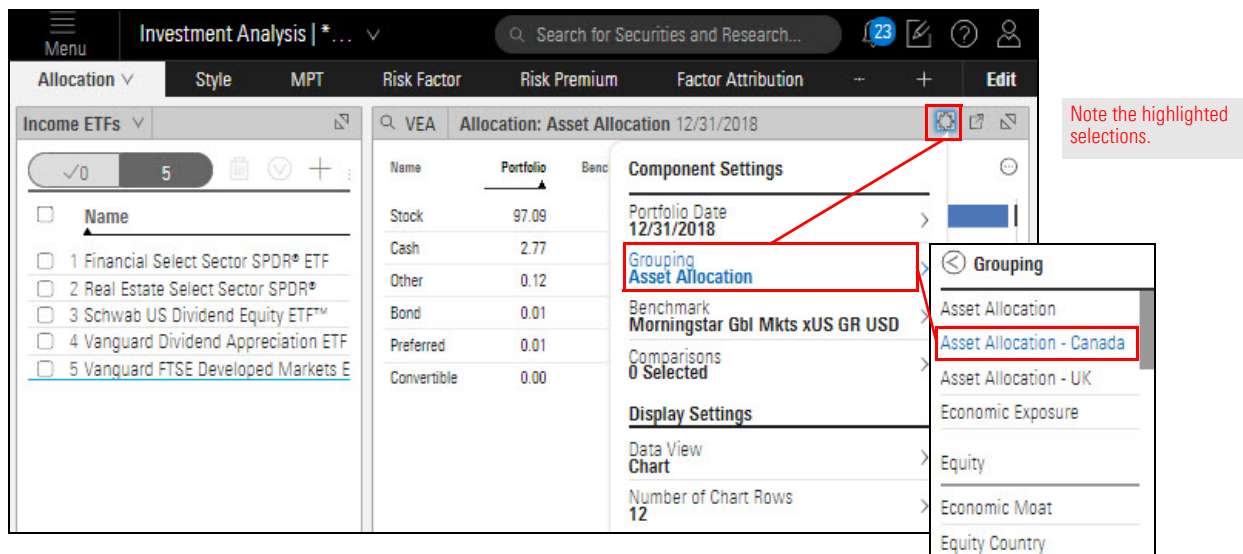


Note the highlighted selections.

11. **Name** the workbook and click **Save**.

In the Allocation and Historical Allocation components, you can now change the grouping to Asset Allocation - Canada. This option is available for funds only.

### How can I identify Canadian Asset Allocations?



You can delete unneeded reports from your workspace, so you can focus on the reports you want to keep and share with your clients.

### How can I delete reports from my workspace?

To learn how to delete reports, please read [Working with Clients and Accounts](#).

In the Reports area, you can create folders and subfolders, making it easier to access your reports.

### How can I organize my reports in folders?

Note: In this release, only Advisor logins have the ability to create folders. Administrator logins cannot create folders; however, they can view the folders created by Advisor logins. Administrator logins will be able to create folders in an upcoming release.

To learn how create folders and subfolders, please read [Working with Clients and Accounts](#).

Due to the new folder capability, you must now select a report before the archive option appears.

To learn how to archive a report, please read [Working with Clients and Accounts](#).

**How can I archive a report?**

A new setting allows you, as an advisor, to opt in or out of being copied on Client Web Portal (CWP) notification emails.

To learn how to opt in or out, please read [Using the Client Web Portal](#).

**How can I opt in or out of CWP emails?**

You can apply either a discount or a charge to a client's past management fees. Perhaps a client sent in a check for too much money, or you neglected to charge for a certain service you performed. You can use an adjustment to the account for such scenarios.

To learn more about adjustments, please read [Creating and Managing Client Bills](#).

**How can I adjust management fees?**