

REPORT PORTAL ON-DEMAND GUIDE FOR ADMINISTRATORS



Welcome to Morningstar Direct Report Portal. Report Portal is designed to share customized investment reports across your organization. Templates built in Presentation Studio can be published to specific users within your firm for on-demand report generation capability.

There are two levels of access to Report Portal. "Administrators" are the owners that publish templates, control permissions, and provide access for the "Users" within your firm. "Users" have access to run and view reports.

[View 2 Minute Tutorial Video](#)

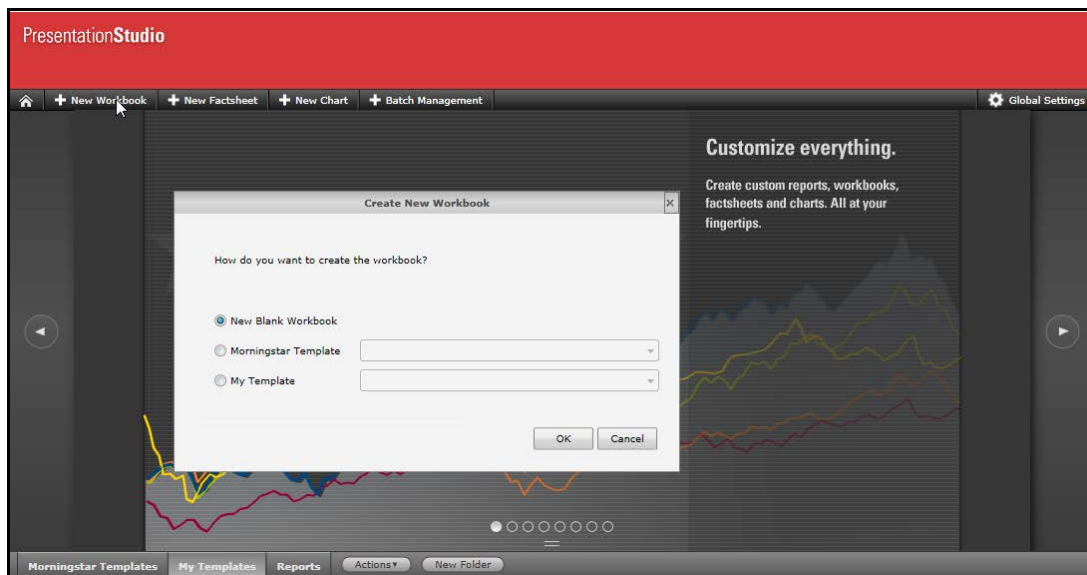
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Quick Setup

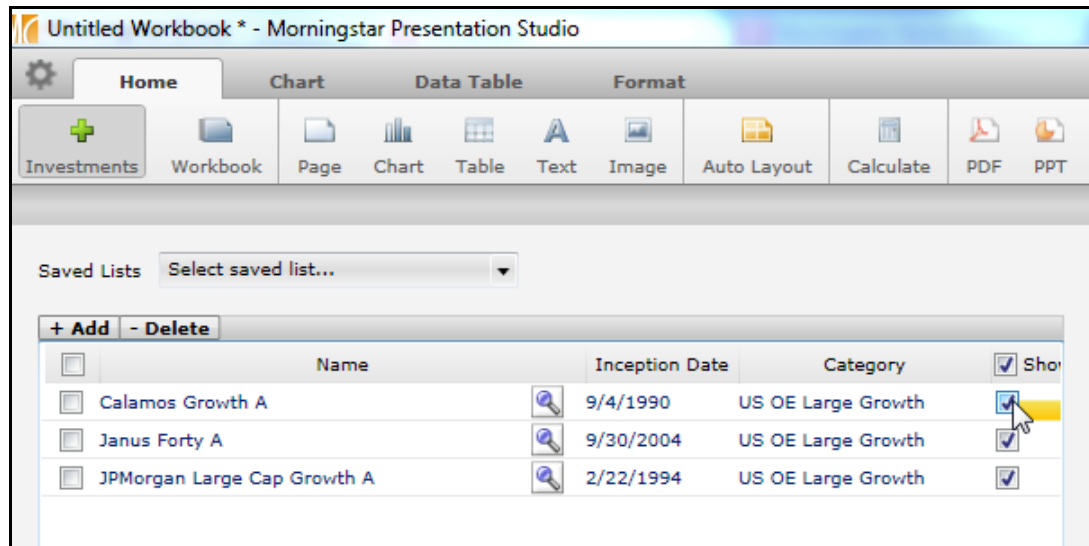
Publishing Templates

1. Open Morningstar Direct, and create custom templates in Presentation Studio. Choose Factsheet for single investment reports, or Workbook for multiple investment reports. (More detailed training on Presentation Studio is available within Morningstar Direct in the Home>Training section or through your Morningstar Direct consultant.)

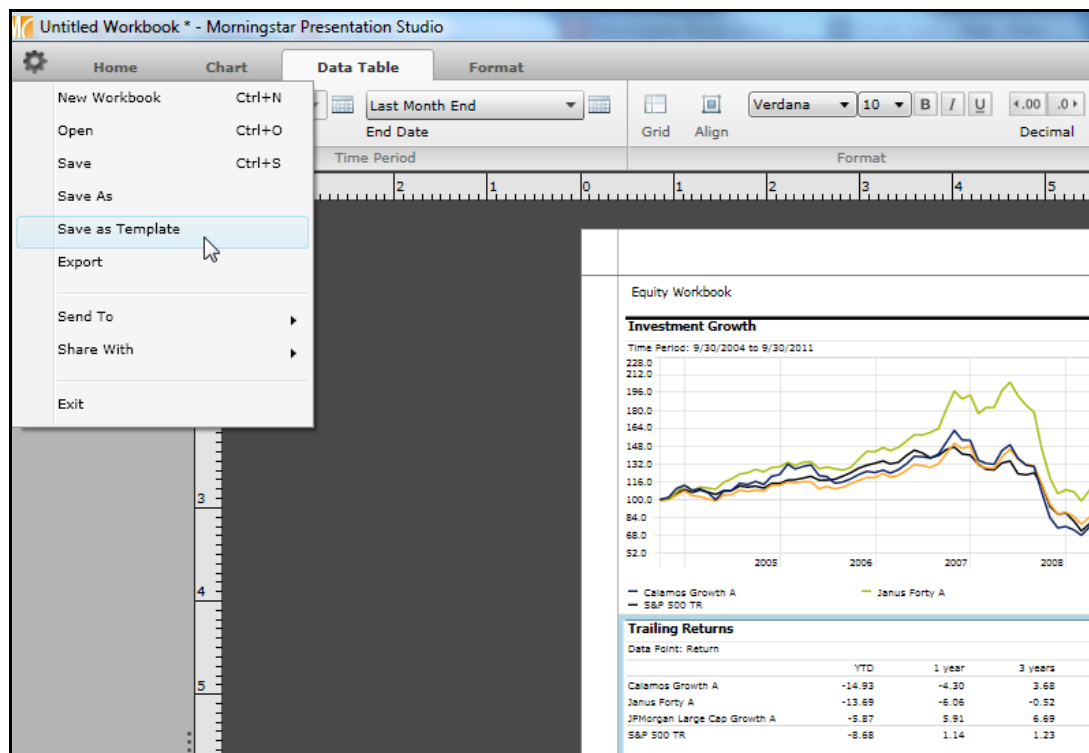


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- If publishing a multiple investment Workbook, ensure that the # of Investments selected to Show in the template is *at least* as many investments as Users will be allowed to select when running their On-Demand reports. This ensures that all of the investments selected by the Users of Report Portal will be included in the reports they generate.

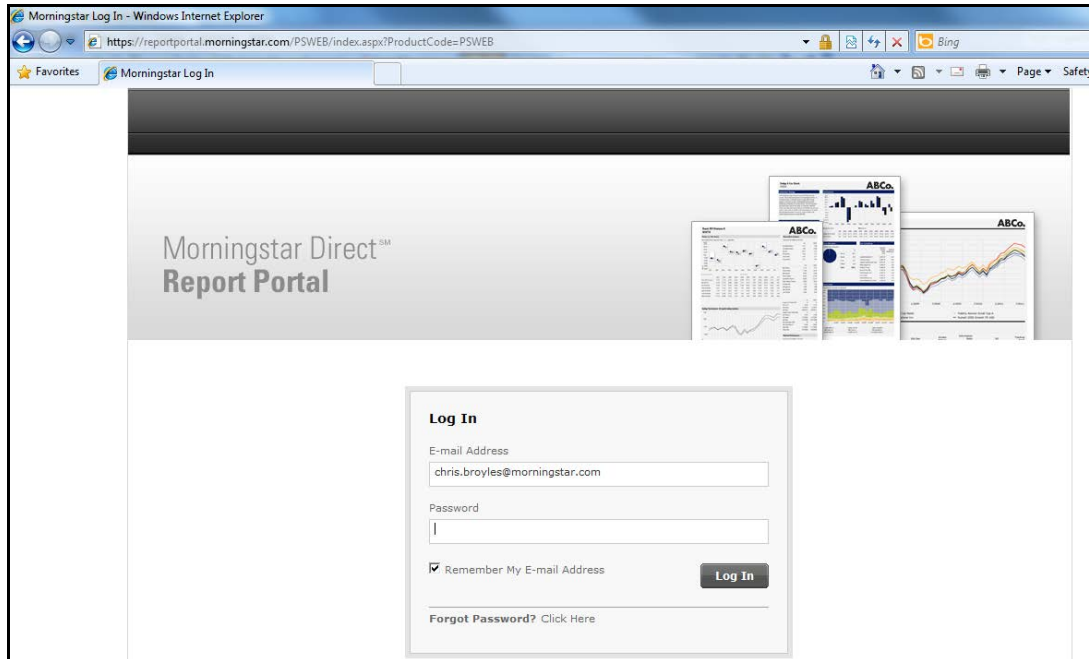


- Build the template as desired. Click the application menu icon in the upper left-hand corner and select "Save as Template" from the dropdown menu.

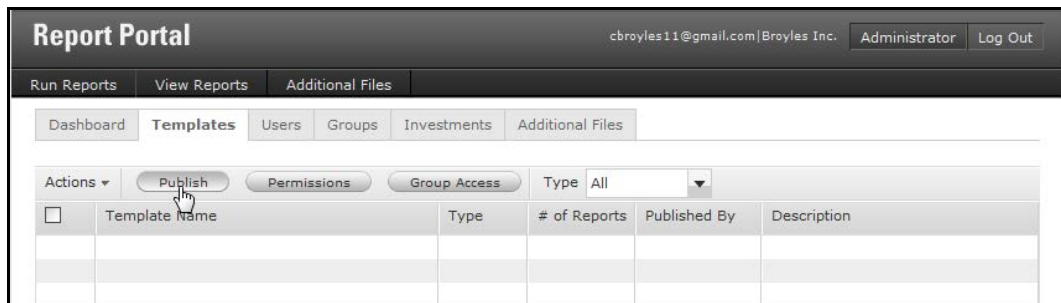


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4. Login to Report Portal. Go to <https://reportportal.morningstar.com/> and enter your Morningstar Direct username and password:



5. Go to the Templates tab to choose templates from Presentation Studio. Click the Publish button.



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6. In the Template dropdown, select a custom template you have already created and saved in Presentation Studio. Set the min and max limit on the number of investments that can be entered into the template at one time (1-15). You can also enter a note with a brief description for Users accessing the template. **(Please note that the effective maximum will be limited to the lesser of the maximum set here, or the # of Investments selected to Show when the template was saved. Refer to step 2 above.)** You can also upload a PDF of the report template for Users to preview the template before they run reports.

Publish Template

Information Permissions Group Access Investments

Select a Presentation Studio template to publish.

Template: Equity Workbook

Number of Investments: Min 1 Max 3

Description: Lineup report for equity funds

Sample Report: [Search Icon]

Save Cancel

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7. Go to the Permissions tab. Permissions will control which settings Users will be able to change when they run reports using this template. Choose Default Parameters options for each Setting, and select whether each Setting should always use these defaults (Read Only), or be optional for the User (Read/Write) each time the Template is accessed.

For example, if Benchmark 1 is set to "Read Only", then Users will not be able to change Benchmark 1 when they use this template to run a report. Default Parameters will be of increased importance when the Setting is made Read Only and Users are not given access to change the defaults. When done, click Save.

Publish Template

Information

Permissions

Group Access

Investments

Select template level permissions. Template level settings that are set to "Read Only" will override group level "Read/Write" permission.

Template Equity Workbook

Setting	Permissions		Default Parameters	
Benchmark1	<input checked="" type="radio"/> Read/Write	<input type="radio"/> Read Only	S&P 500 TR	<input type="button" value="Q"/>
Benchmark2	<input type="radio"/> Read/Write	<input checked="" type="radio"/> Read Only	Russell 2000 TR USD	<input type="button" value="Q"/>
Start Date	<input checked="" type="radio"/> Read/Write	<input type="radio"/> Read Only	5 years ago	<input type="button" value="v"/>
End Date	<input checked="" type="radio"/> Read/Write	<input type="radio"/> Read Only	Last Quarter End	<input type="button" value="v"/>
Portfolio Date	<input type="radio"/> Read/Write	<input checked="" type="radio"/> Read Only	Most Recent Portfolio	<input type="button" value="v"/>
Peer Group	<input type="radio"/> Read/Write	<input checked="" type="radio"/> Read Only	Open End Funds - U.S. - I	<input type="button" value="Q"/>
Currency	<input type="radio"/> Read/Write	<input checked="" type="radio"/> Read Only	US Dollar	<input type="button" value="v"/>
File Format	<input type="radio"/> Read/Write	<input checked="" type="radio"/> Read Only	PDF	<input type="button" value="v"/>

Save

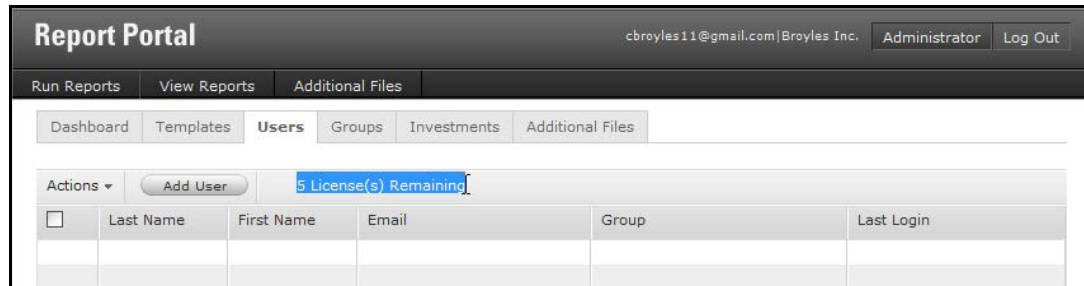
Cancel

8. Revisit the Group Access and Investments tabs later after adding Users and creating Groups (optional).

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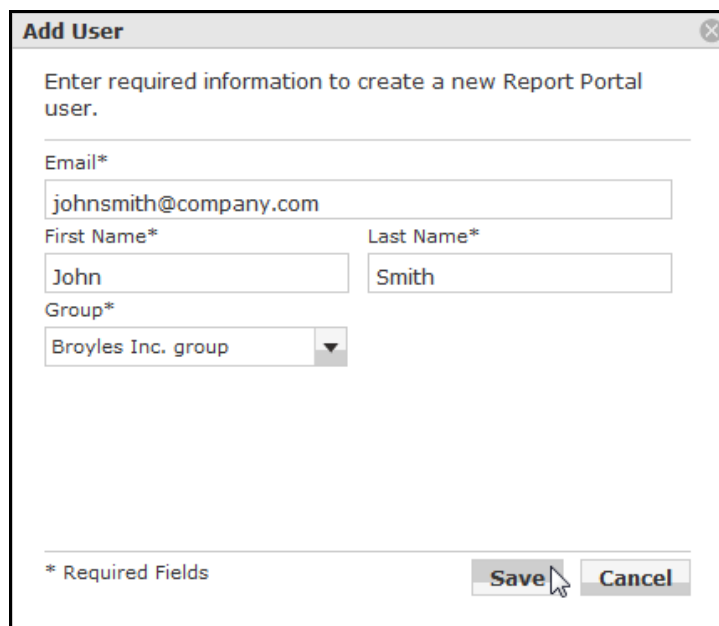
Setting Up Users

1. Add Users – Click on the Users tab to control access to Report Portal. Take note of how many user licenses are remaining. As long as additional licenses remain, click Add User to assign a license to a new user. Use the Actions menu to Edit, Delete or Reset password for current users.



The screenshot shows the 'Report Portal' interface. At the top, there's a header with the email 'cbroyles11@gmail.com | Broyles Inc.' and buttons for 'Administrator' and 'Log Out'. Below the header is a navigation bar with tabs: 'Run Reports', 'View Reports', 'Additional Files', 'Users', 'Groups', 'Investments', and 'Additional Files'. The 'Users' tab is selected. Below the navigation bar, there's a section with 'Actions' (a dropdown menu) and an 'Add User' button. To the right of the 'Add User' button, it says '5 License(s) Remaining'. Below this is a table with columns: 'Last Name', 'First Name', 'Email', 'Group', and 'Last Login'. The table is currently empty.

2. Click the Add User button to assign a remaining license to a user within the firm. This will generate an email message to the User with a link to Report Portal and instructions on logging in.



The screenshot shows the 'Add User' dialog box. It has a title bar with 'Add User' and a close button. The main text says 'Enter required information to create a new Report Portal user.' Below this are several input fields: 'Email*' with the value 'johnsmith@company.com', 'First Name*' with the value 'John', and 'Last Name*' with the value 'Smith'. There is also a 'Group*' dropdown menu with the value 'Broyles Inc. group'. At the bottom, there's a legend '* Required Fields' and two buttons: 'Save' and 'Cancel'.

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Preview the User View

1. Switch from the Administrator view to the User view by clicking on the “Run Reports” tab. Click on any of the User view tabs shown below to hide the additional Administrator tabs. At anytime, click the Administrator button in the upper right corner to switch back to Administrator mode.



2. Preview the Run Reports tab to ensure it appears as desired. Under Run Reports, the Templates that were uploaded should appear. Click on the “Run” button to preview which settings are available to Users (Note: different User groups can be setup with different settings)

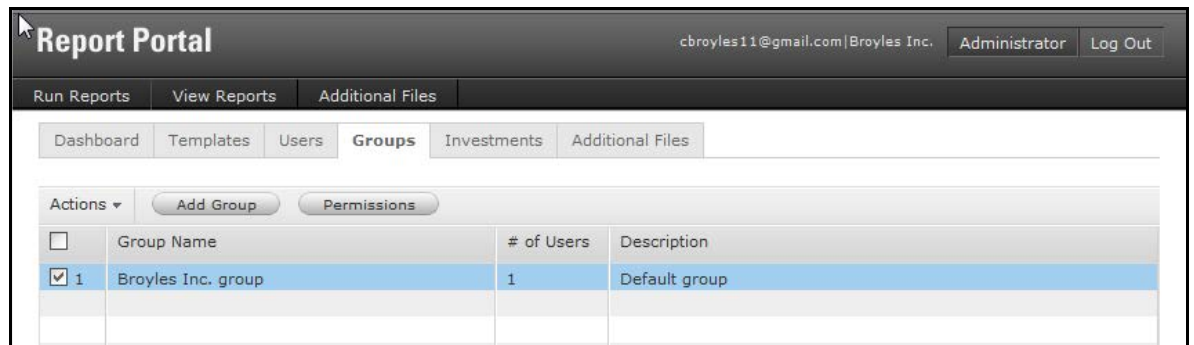
The screenshot shows the 'Run Reports' tab selected in the navigation bar. Below the navigation bar is a table with the following data:

	Template Name	Description	Sample		Status
1	Equity Workbook	Lineup report for equity funds		Run	
2	Fixed Income	Fixed income factsheet		Run	

Additional Features

User Groups

1. The Groups feature differentiates permissions for different types of Users. There will always be at least one default Group. To create an additional Group and customize its access rights, go to the Groups tab and click Add Group.



2. Give the Group a name and description. Click the Permissions and Template Access tabs to assign rights for this group, and then click Save.

The 'Edit Group' dialog box is shown with the 'Information' tab selected. It contains the following fields:

- Name***: A text input field containing 'Wholesalers'.
- Description**: A text area containing 'External wholesalers'.

At the bottom, there is a note '* Required Fields' and two buttons: 'Save' and 'Cancel'.

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3. Go to the Permissions and Template Access tabs. Customize settings for the new group. This can be edited in the future by going back to the Groups tab, selecting a Group and clicking the Permissions button.

Permissions

Information **Permissions** Template Access

Select group level permissions.

Setting	Permissions	
Benchmark1	<input type="radio"/> Read/Write	<input checked="" type="radio"/> Read Only
Benchmark2	<input type="radio"/> Read/Write	<input checked="" type="radio"/> Read Only
Start Date	<input checked="" type="radio"/> Read/Write	<input type="radio"/> Read Only
End Date	<input checked="" type="radio"/> Read/Write	<input type="radio"/> Read Only
Portfolio Date	<input type="radio"/> Read/Write	<input checked="" type="radio"/> Read Only
Peer Group	<input type="radio"/> Read/Write	<input checked="" type="radio"/> Read Only
Currency	<input checked="" type="radio"/> Read/Write	<input type="radio"/> Read Only
File Format	<input type="radio"/> Read/Write	<input checked="" type="radio"/> Read Only

* Required Fields

Save Cancel

Permissions

Information Permissions **Template Access**

Select which user groups will have access to this template.

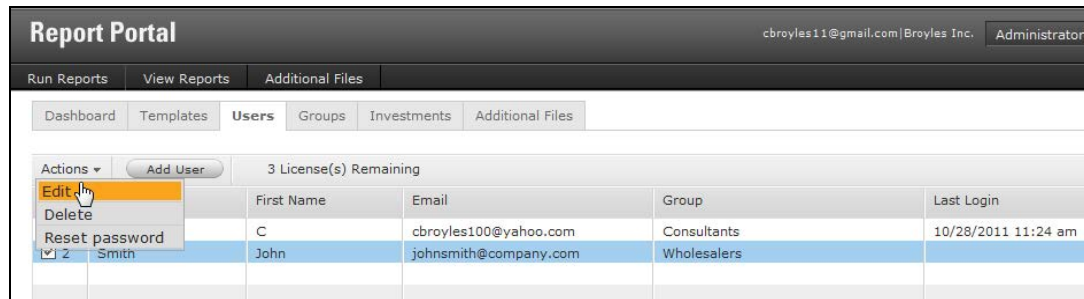
Template	Type	Access	
Equity Workbook	Workbook	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Fixed Income	Factsheet	<input checked="" type="radio"/> Yes	<input type="radio"/> No

* Required Fields

Save Cancel

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- Go back to the Users tab and assign Users to the newly created Groups. Check the box next to a User name, go to Actions/Edit, select the appropriate Group from the drop-down box, and Save. Notice the Group column in the grid view will update displaying which Group each User is currently assigned to.

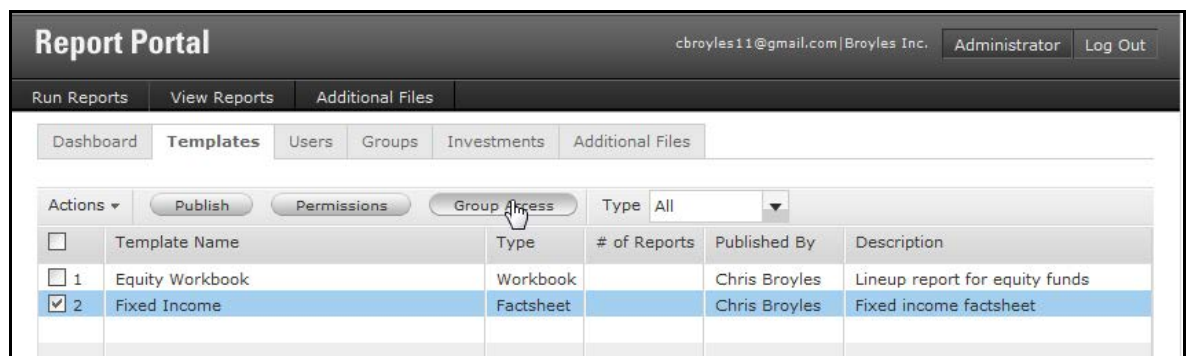


The 'Edit User' dialog box is shown, prompting the user to enter required information to create a new Report Portal user. The fields are as follows:

- Email*: johnsmith@company.com
- First Name*: John
- Last Name*: Smith
- Group*: A dropdown menu with 'Wholesalers' selected.

Buttons for 'Save' and 'Cancel' are at the bottom right.

- Template permission can be limited to certain Groups at the template level as well. Go back to the Templates tab, select a Template, and click on Group Access.



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- By default, newly created templates will be available to all Groups. Choose the Groups that should have access and click Save.

Group Access

Select which user groups will have access to this template.

Template Fixed Income

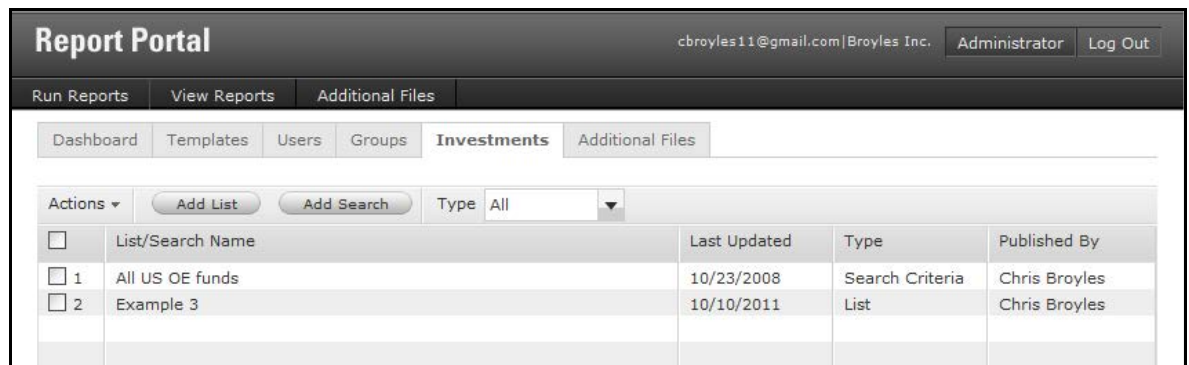
Group	Template Access	
Broyles Inc. group	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Subset #1	<input type="radio"/> Yes	<input checked="" type="radio"/> No

- Permissions can be set at both the Template level and Group level. It is possible to create combinations of settings that contradict. If this occurs, the most restrictive permission setting will be applied. For example if a template has Read/Write access for setting Benchmark1, but a User from a Group accessing the template only has Read Only access to the setting, Read Only will apply.

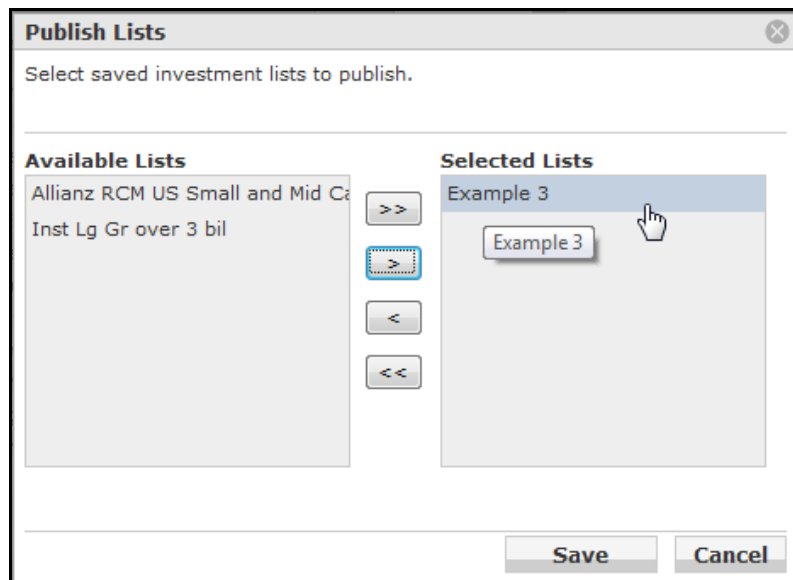
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Restricting Investments

1. By default, Users will have access to all investments in the Morningstar database. Use this feature to narrow down which Investments Users will be able to choose from. Click the Investments tab to pull in investment Lists (static) and/or investment Searches (dynamic) that are saved in your Direct Workspace.



2. Use the Add List or Add Search button to access saved lists and searches. Select the appropriate items and click Save.

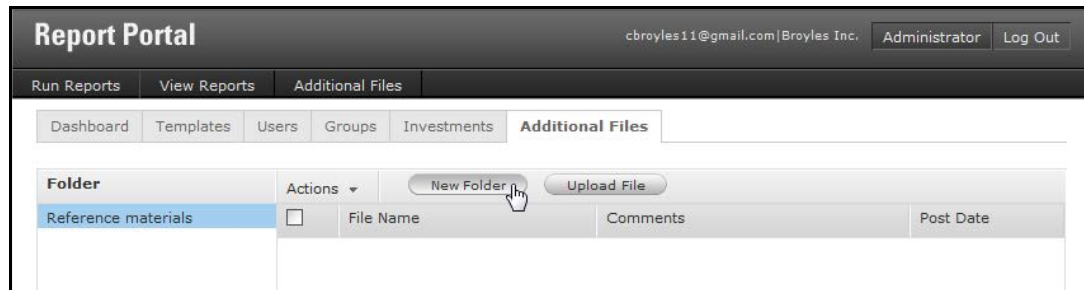


3. After Lists and Searches have been added to the Investments tab, they can be associated with templates by accessing the Edit Template dialog, Permissions tab.

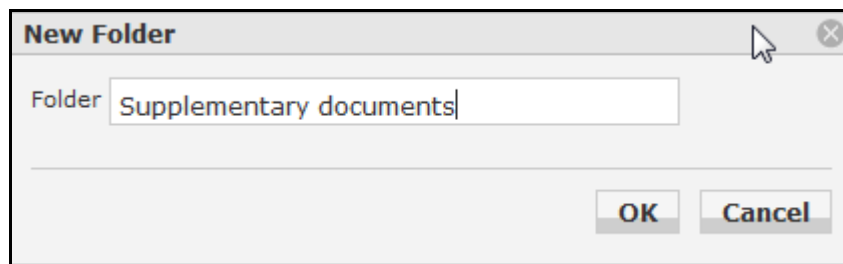
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File Sharing

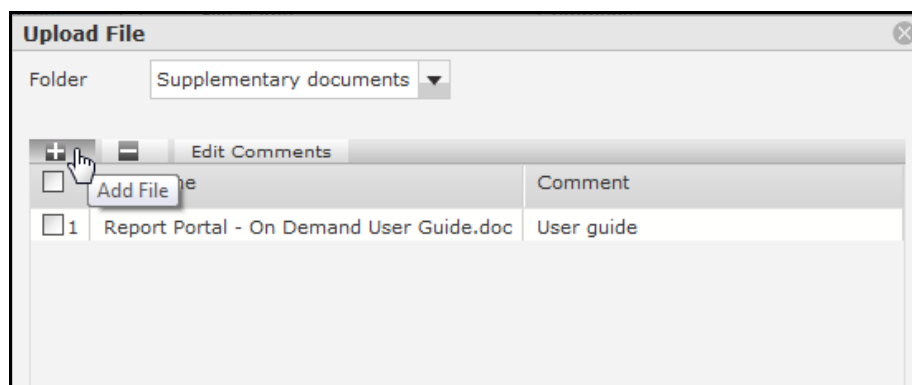
1. Additional files of any type can be stored in Report Portal for simple sharing with Users. Go to the Additional Files tab to upload files.



2. Click New Folder to create folders to organize files as appropriate.




3. Click the Upload File button. Select the proper destination Folder from the drop-down, and use the + and - buttons to add or remove files.



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4. Switch to the User view to verify that the Additional Files display the folder(s) and file(s).

Report Portal					
cbroyles11@gmail.com Broyles Inc. Administrator Log Out					
Run Reports View Reports Additional Files					
Folder	Actions				
Reference materials	<input type="checkbox"/>	File Name	Comments	Postdate	View File
Supplementary docume...	<input type="checkbox"/> 1	Report Portal - On Demand U...	User guide	10/10/2011 11:17	

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Monitoring Usage

1. The Dashboard allows Administrators to monitor Users' usage of the Report Portal. There are multiple views and an adjustable Time Period drop down to display usage by different dimensions. Any of these views can also be exported to Excel for further Analysis by clicking the Export button.

Report Portal

cbroyles11@gmail.com | Broyles Inc.

Administrator

Log Out

Run Reports

View Reports

Additional Files

Dashboard

Templates

Users

Groups

Investments

Additional Files

View: Reports

Time Period: Last 6 months

Export

Refresh

<input type="checkbox"/>	Report Name	Created On	Created By	Template Used	Investments	View Report
<input type="checkbox"/> 1	Fixed Income_PIMCO Total R...	10/10/2011 11:36 a	Chris Broyles	Fixed Income	PTTAX	
<input type="checkbox"/> 2	Equity Workbook_JPMorgan L...	10/10/2011 11:34 a	Chris Broyles	Equity Workbook	OLGAX,FMAGX	

2. Views

Investments – See which Investments are getting the most interest. Sort by # of Reports or % of Reports to quickly see the most and least popular.

Dashboard Templates Users Groups Investments Additional Files						
View:	Investments	Time Period:	Last 6 months	Export	Refresh	
<input type="checkbox"/>	Investment Name	Ticker	ISIN	# of Reports	% of Reports	
<input type="checkbox"/> 1	Fidelity Magellan	FMAGX	US3161841008	1	50.0%	
<input type="checkbox"/> 2	JPMorgan Large Cap Growth A	OLGAX	US4812C05063	1	50.0%	
<input type="checkbox"/> 3	PIMCO Total Return A	PTTAX	US6933904459	1	50.0%	

Reports – See a full list of all the Reports that have been created. Sort by Created On date to see how recently and frequently the reports are being accessed.

Dashboard Templates Users Groups Investments Additional Files						
View:	Reports	Time Period:	Last 6 months	Export	Refresh	
<input type="checkbox"/>	Report Name	Created On	Created By	Template Used	Investments	View Report
<input type="checkbox"/> 1	Fixed Income_PIMCO Total R...	10/10/2011 11:36 a	Chris Broyles	Fixed Income	PTTAX	
<input type="checkbox"/> 2	Equity Workbook_JPMorgan L...	10/10/2011 11:34 a	Chris Broyles	Equity Workbook	OLGAX,FMAGX	

Templates – Similar to the Investments view, see which report template is getting the most attention.

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Dashboard					Templates	Users	Groups	Investments	Additional Files
View: Templates					Time Period: Last 6 months		Export Refresh		
<input type="checkbox"/>	Template Name				# of Reports		% of Reports		
<input type="checkbox"/> 1	Equity Workbook				1		50.0%		
<input type="checkbox"/> 2	Fixed Income				1		50.0%		

Users – Monitor usage by individual users. Sort by # of Reports to see who is using it most and least, or sort by Last Login to find users who have not been utilizing Report Portal.

Dashboard					Templates	Users	Groups	Investments	Additional Files
View: Users					Time Period: Last 6 months		Export Refresh		
<input type="checkbox"/>	Last Name	First Name	Email	Group	# of Reports		Last Login		
<input type="checkbox"/> 1	Broyles	Chris	cbroyles11@gmail.com		2		10/10/2011 9:01 am		
<input type="checkbox"/> 2	Smith	John	johnsmith@company.com	Subset #1					

Groups – Similar to Users, monitor usage by your custom assigned Groups of Users.

Dashboard					Templates	Users	Groups	Investments	Additional Files
View: Groups					Time Period: Last 6 months		Export Refresh		
<input type="checkbox"/>	Group Name				# of Reports		# of Users		
<input type="checkbox"/> 1	Broyles Inc. group								
<input type="checkbox"/> 2	Subset #1						1		