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.

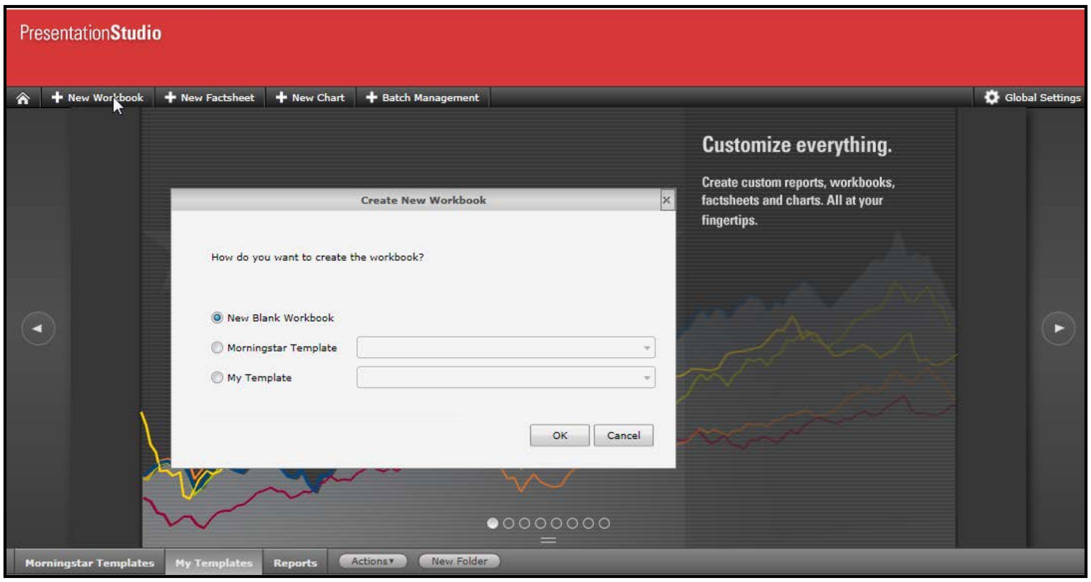
[View 2 Minute Tutorial Video]

Contents

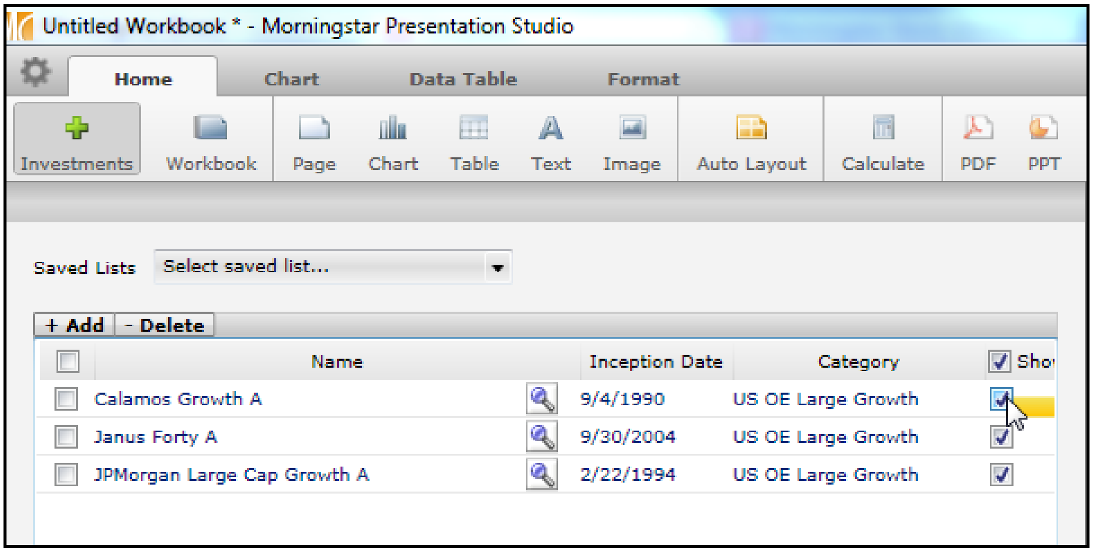
Quick Setup

Publishing Templates

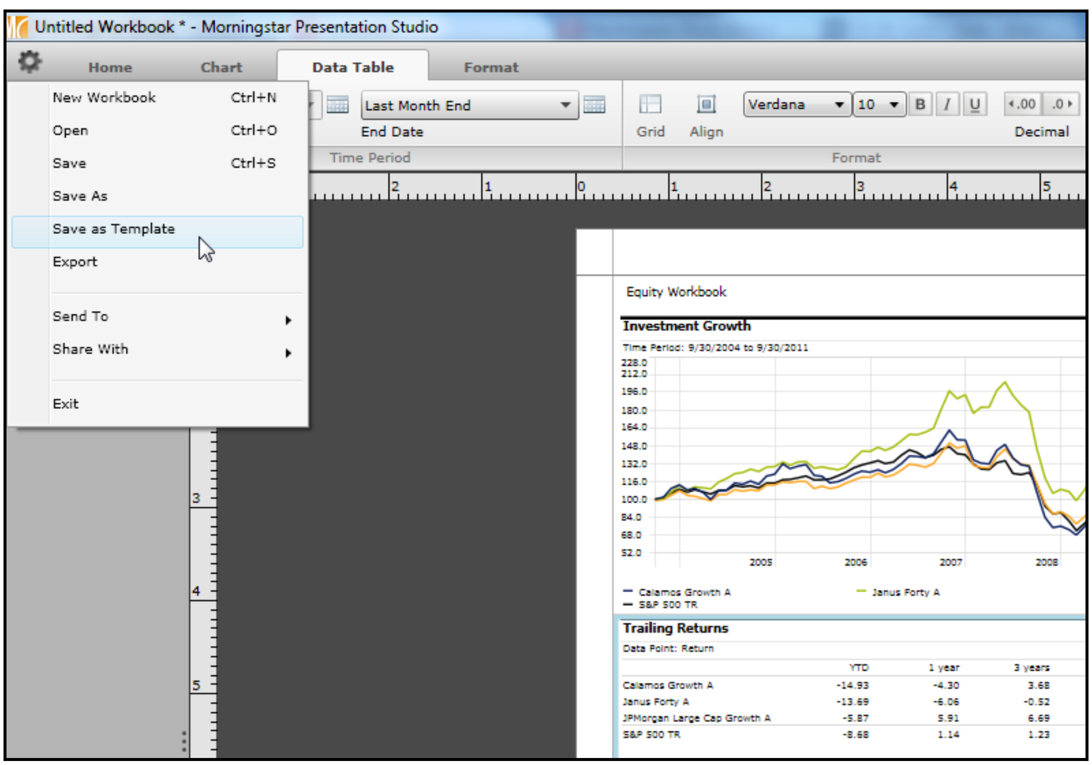
1. Open Morningstar Direct, and create custom templates in Presentation Studio. Choose Factsheet for single investment reports, or Workbook for multiple investment reports. (More detailed training on Presentation Studio is available within Morningstar Direct in the Home>Training section or through your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



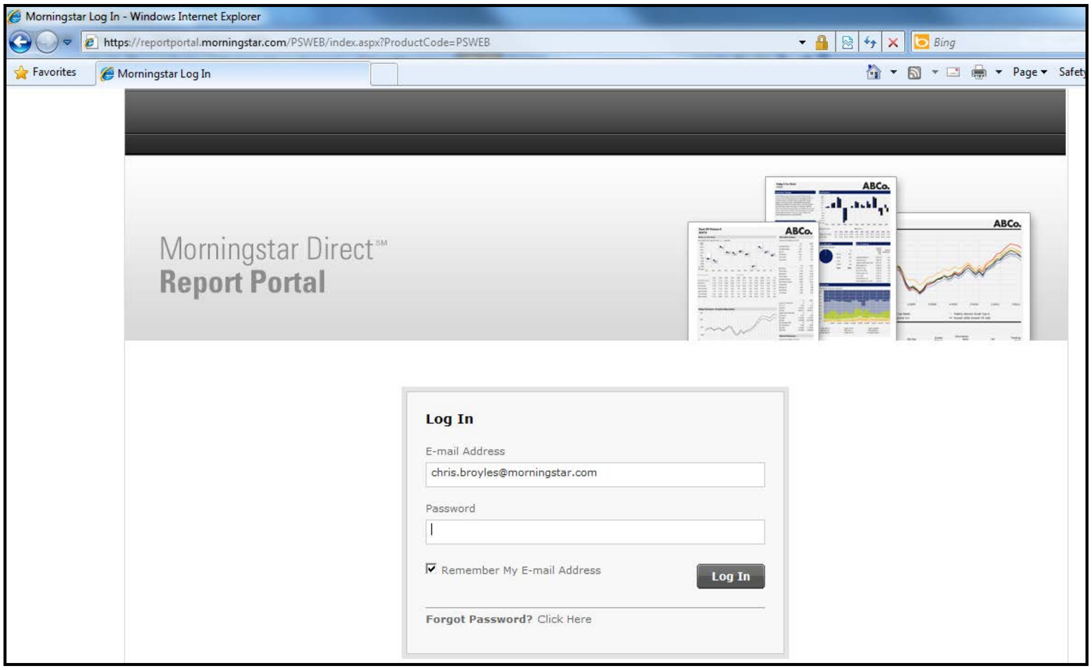
2. If publishing a multiple investment Workbook, ensure that the # of Investments selected to Show in the template is *at least* as many investments as Users will be allowed to select when running their On-Demand reports. This ensures that all of the investments selected by the Users of Report Portal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



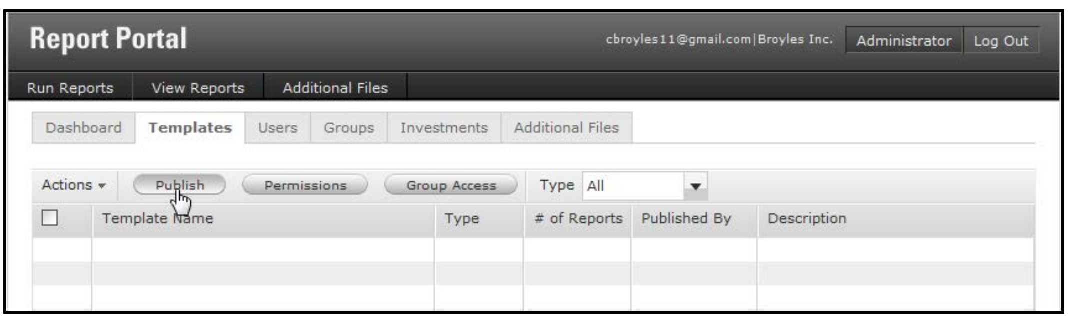
3. Build the template as desired. Click the application menu icon in the upper left-hand corner and select "Save as Template" from the dropdown menu.



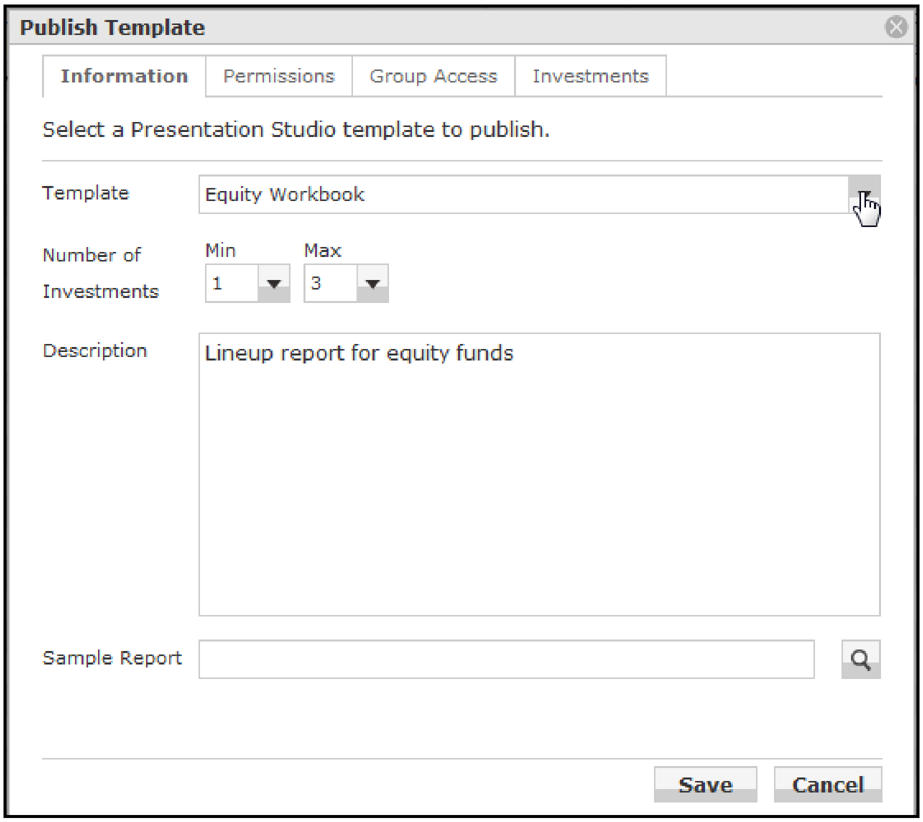
4. Login to Report Portal. Go to https://reportportal.morningstar.com/ and enter your Morningstar Direct username and password:



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

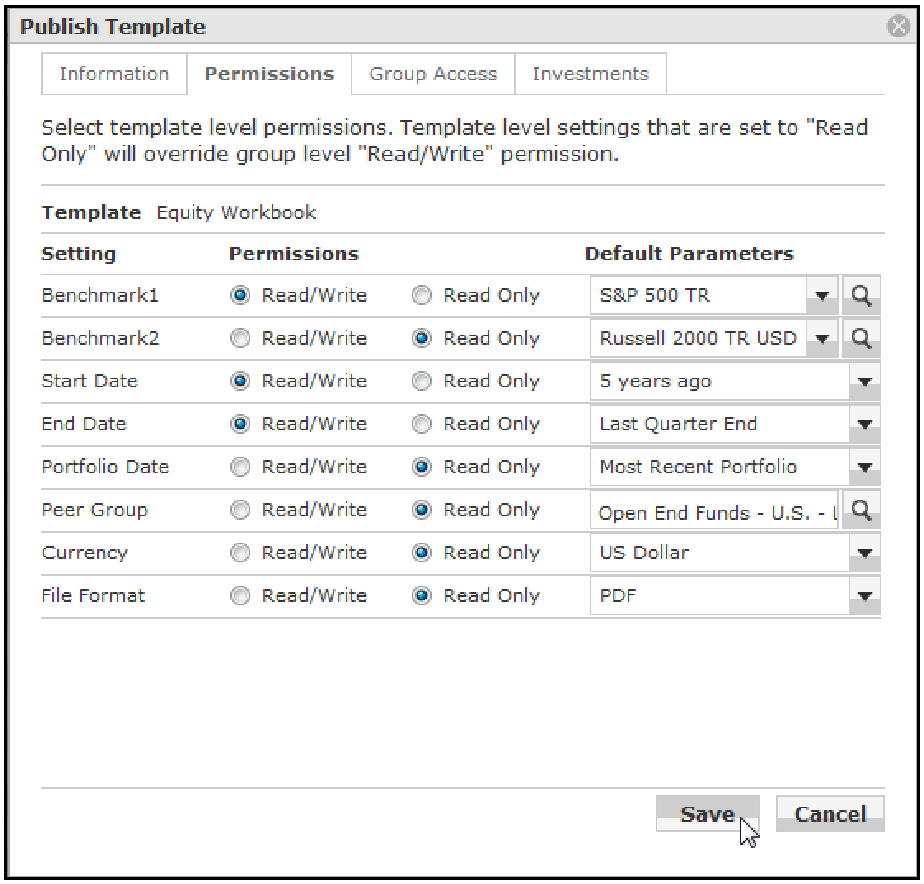


6. In the Template dropdown, select a custom template you have already created and saved in Presentation Studio. Set the min and max limit on the number of investments that can be entered into the template at one time (1-15). You can also enter a note with a brief description for Users accessing the 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.



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.

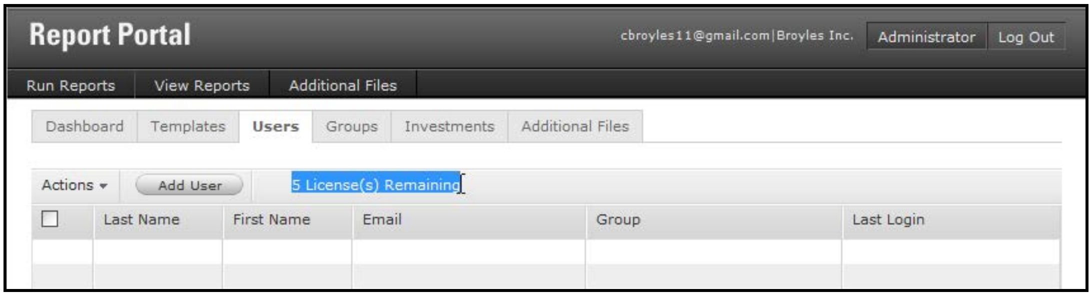
   For example, if Benchmark 1 is set to "Read Only", then Users will not be able to change Benchmark 1 when they use this template to run a report. Default Parameters will be of increased importance when the Setting is made Read Only and Users are not given access to change the defaults. When done, click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



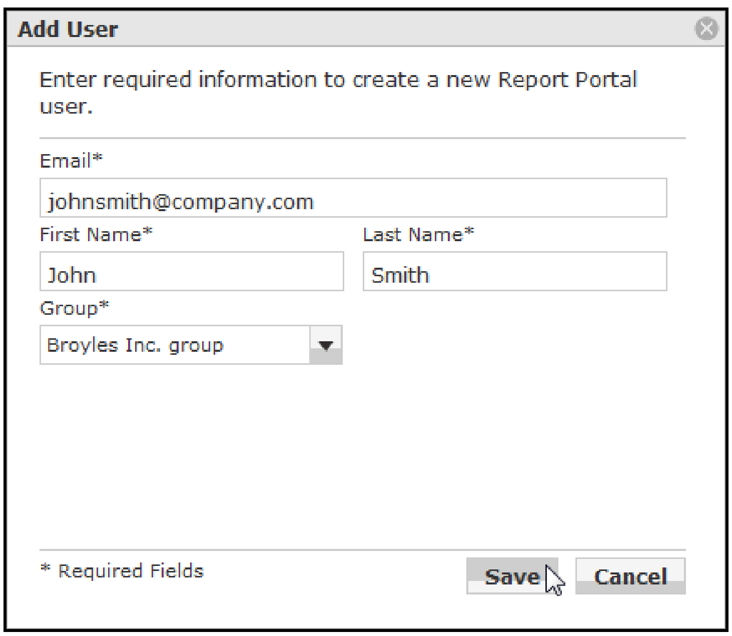
8. Revisit the Group Access and Investments tabs later after adding Users and creating Groups (optional).

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.



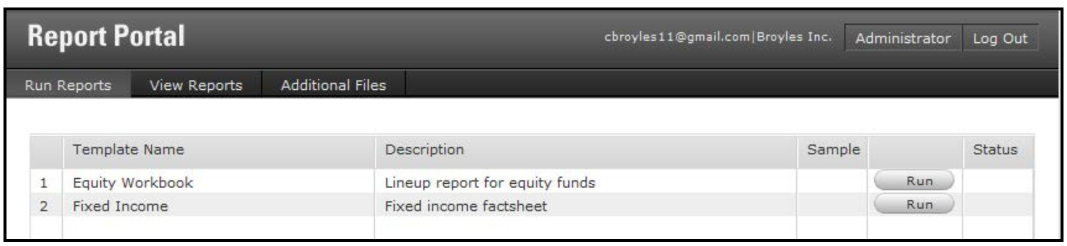
2. Click the Add User button to assign a remaining license to a user within the firm. This will generate an email message to the User with a link to Report Portal and instructions on logging in.



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.

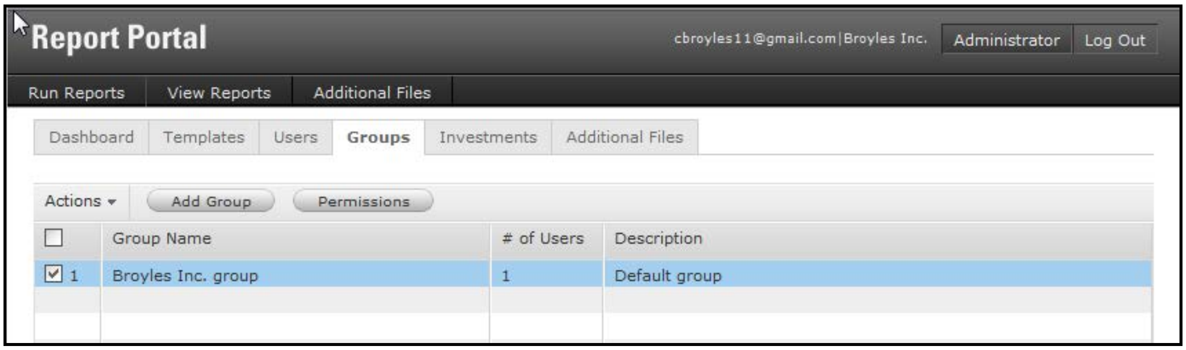
2. Preview the Run Reports tab to ensure it appears as desired. Under Run Reports, the Templates that were uploaded should appear. Click on the “Run” button to preview which settings are available to Users (Note: different User groups can be setup with different settings)



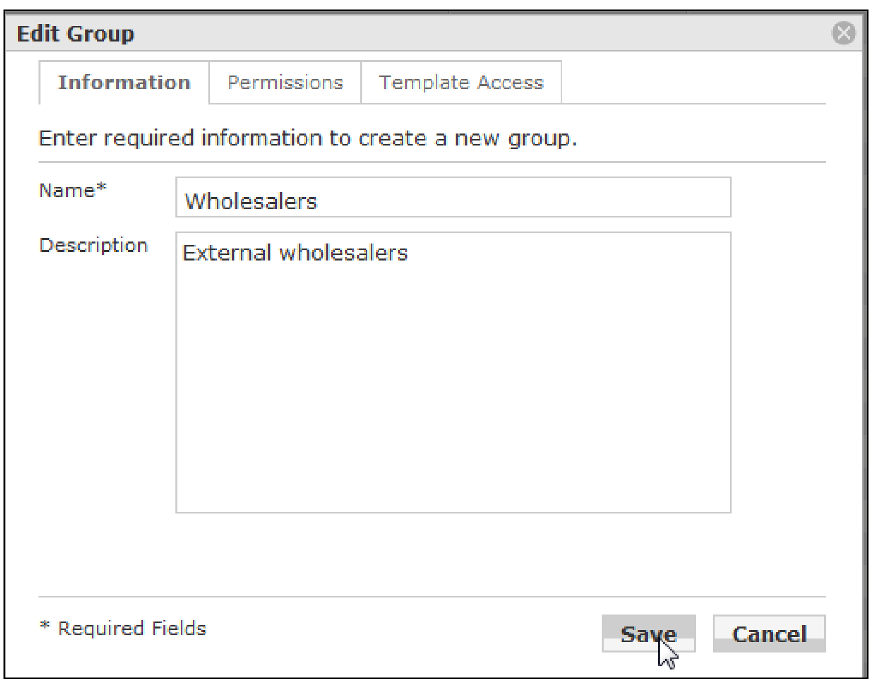
Additional Features

User Groups

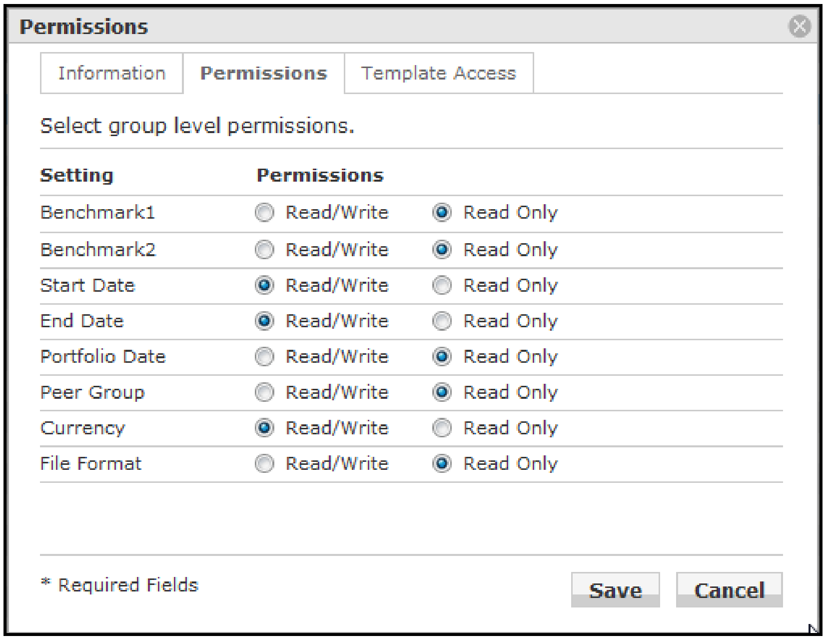
1. The Groups feature differentiates permissions for different types of Users. There will always be at least one default Group. To create an additional Group and customize its access rights, go to the Groups tab and click Add Group.

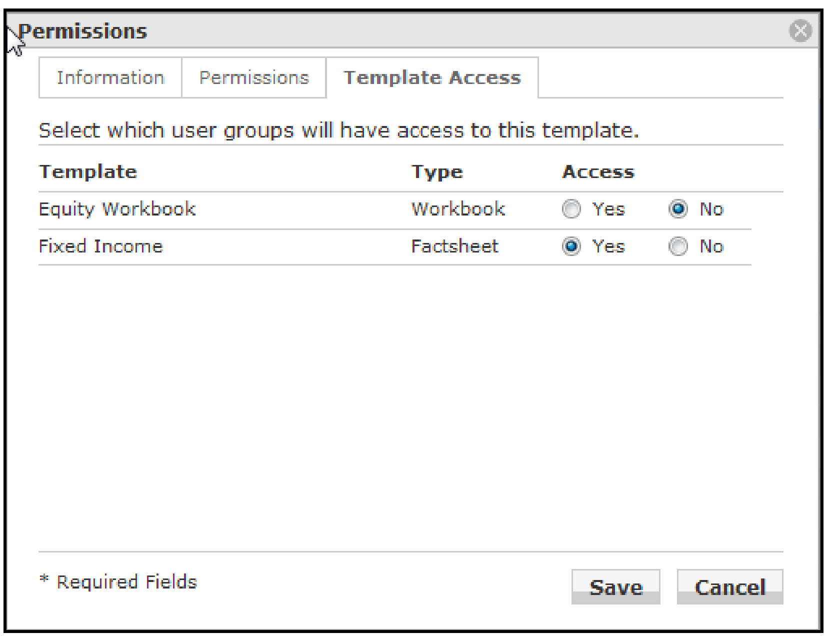


2. Give the Group a name and description. Click the Permissions and Template Access tabs to assign rights for this group, and then click Save.

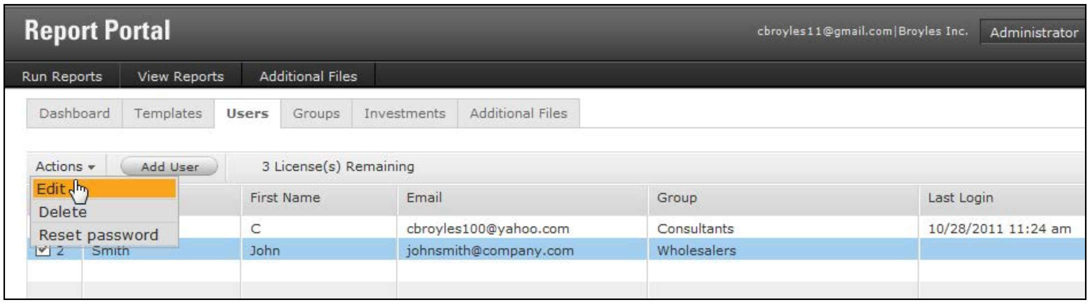


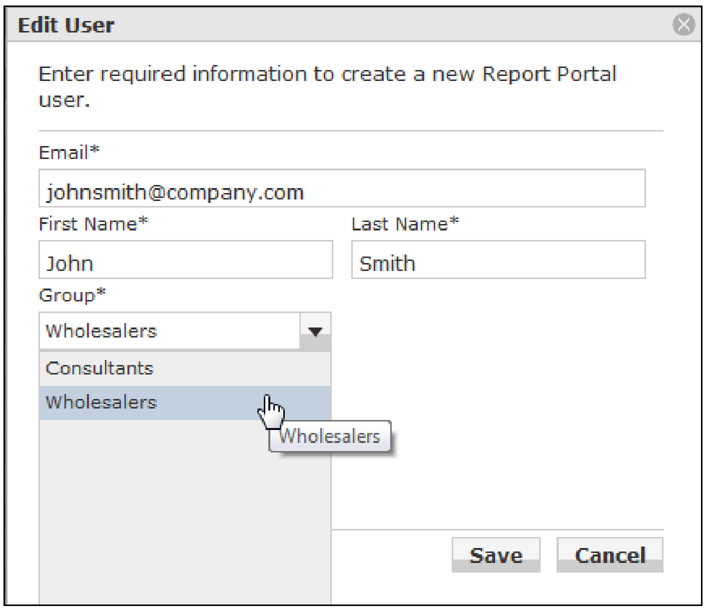
3. Go to the Permissions and Template Access tabs. Customize settings for the new group. This can be edited in the future by going back to the Groups tab, selecting a Group and clicking the Permissions button.



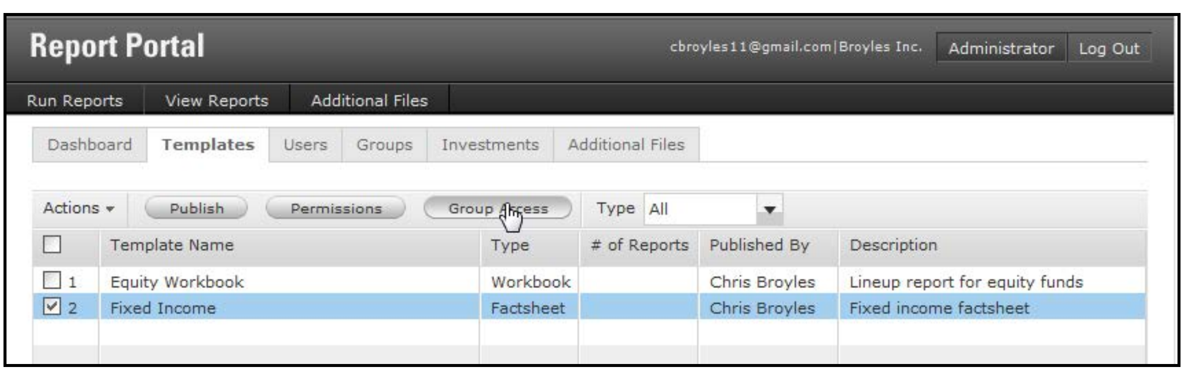


4. Go back to the Users tab and assign Users to the newly created Groups. Check the box next to a User name, go to Actions/Edit, select the appropriate Group from the drop-down box, and Save. Notice the Group column in the grid view will update displaying which Group each User is currently assigned to.

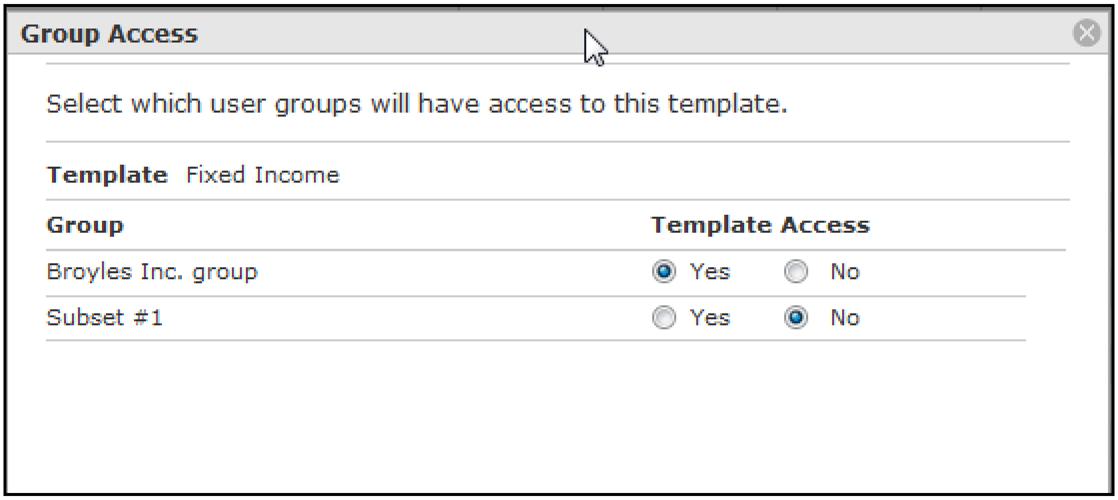




5. Template permission can be limited to certain Groups at the template level as well. Go back to the Templates tab, select a Template, and click on Group Access.



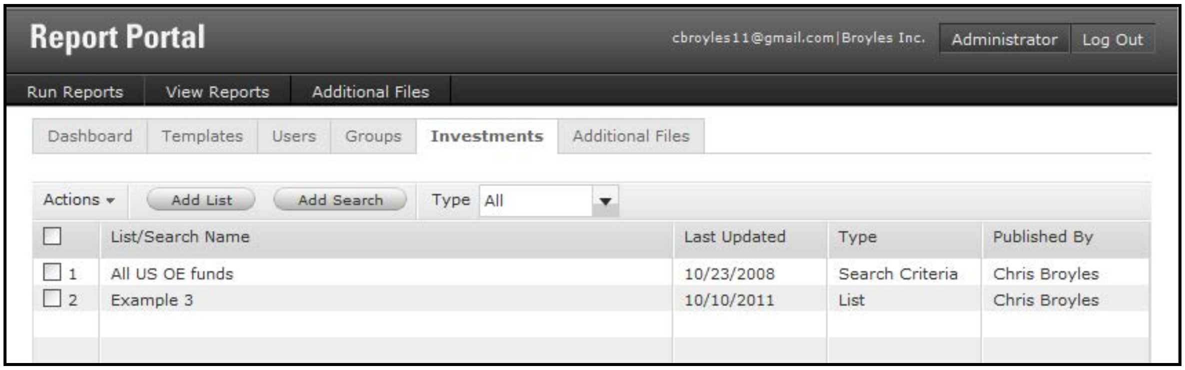
6. By default, newly created templates will be available to all Groups. Choose the Groups that should have access and click Save.



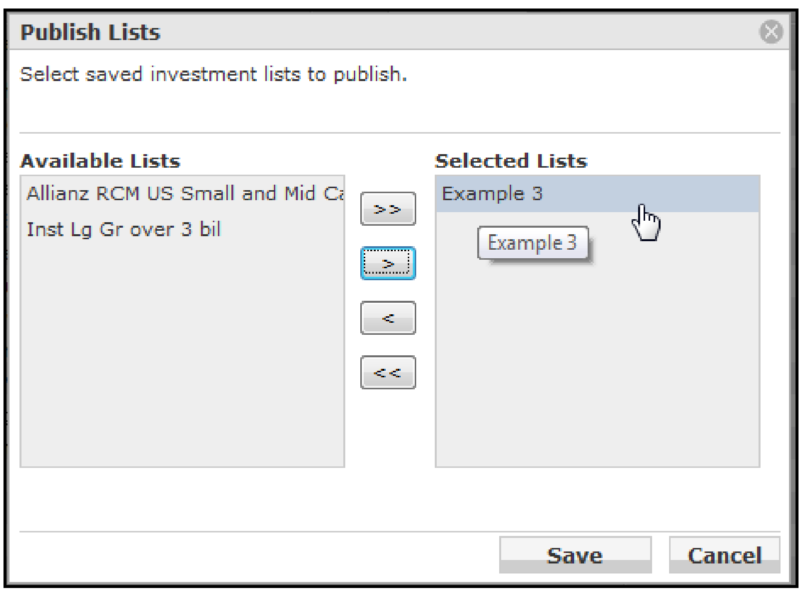
7. Permissions can be set at both the Template level and Group level. It is possible to create combinations of settings that contradict. If this occurs, the most restrictive permission setting will be applied. For example if a template has Read/Write access for setting Benchmark1, but a User from a Group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

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.



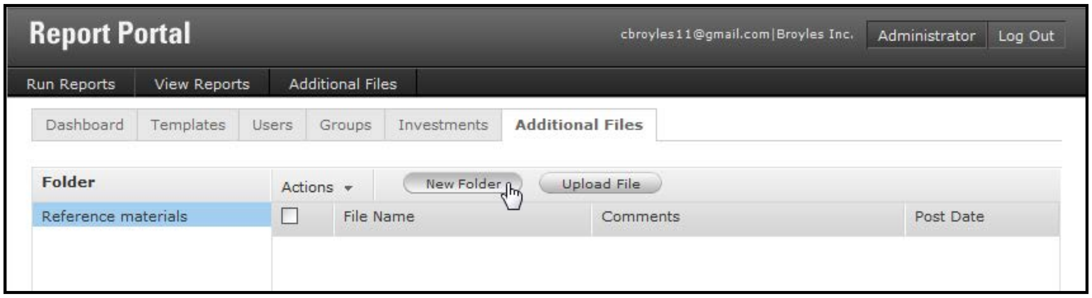
2. Use the Add List or Add Search button to access saved lists and searches. Select the appropriate items and click Save.



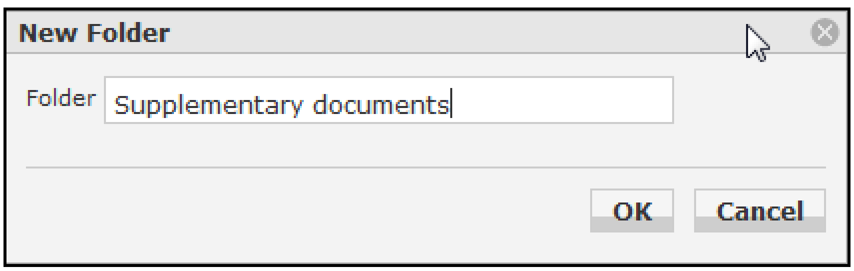
3. After Lists and Searches have been added to the Investments tab, they can be associated with templates by accessing the Edit Template dialog, Permissions tab.

File Sharing

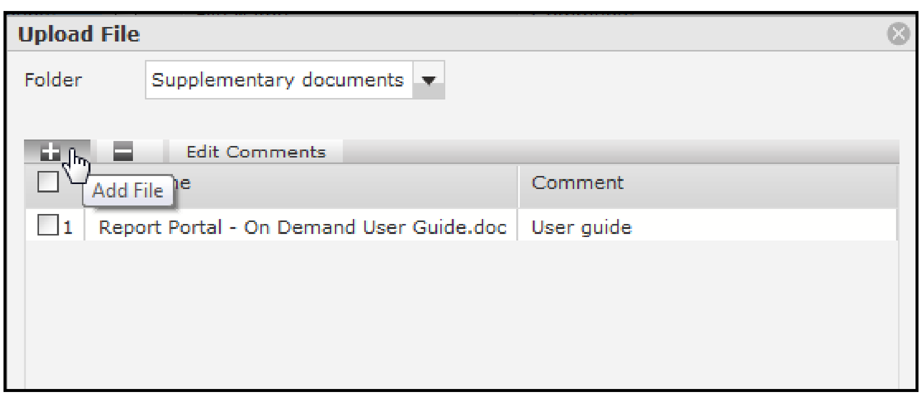
1. Additional files of any type can be stored in Report Portal for simple sharing with Users. Go to the Additional Files tab to upload files.



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



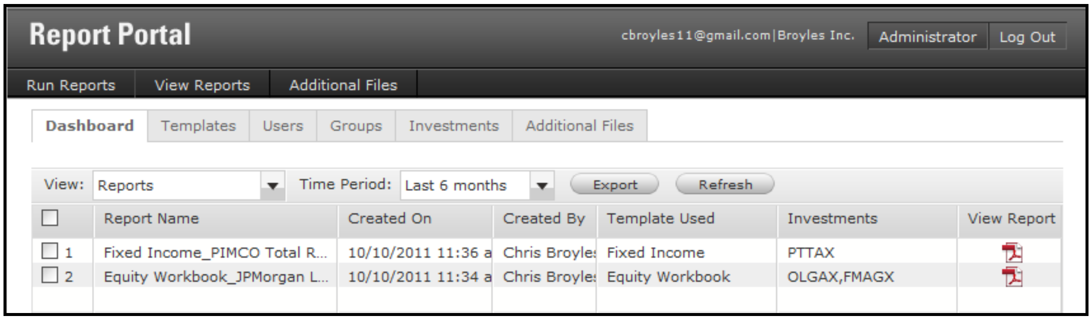
3. Click the Upload File button. Select the proper destination Folder from the drop-down, and use the + and - buttons to add or remove files.



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

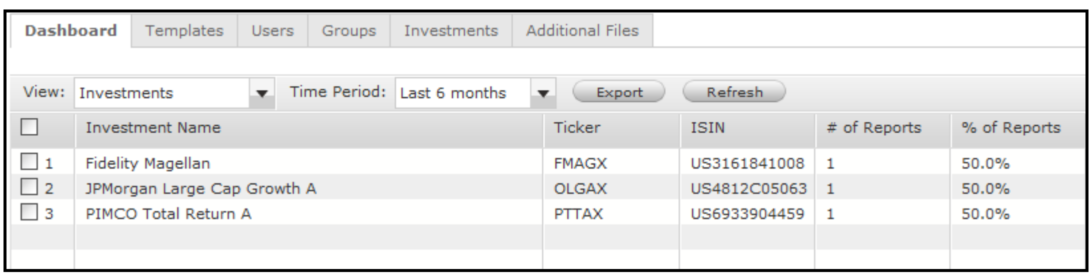
Monitoring Usage

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.

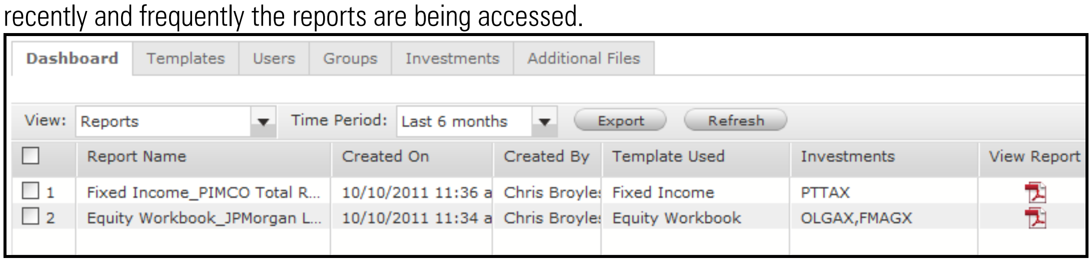


2. Views

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



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.



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

Dashboard | Templates | Users | Groups | Investments | Additional Files

View: Templates Time Period: Last 6 months Export Refresh

	Template Name	# of Reports	% of Reports
1	Equity Workbook	1	50.0%
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

	Last Name	First Name	Email	Group	# of Reports	Last Login
1	Broyles	Chris	cbroyles11@gmail.com		2	10/10/2011 9:01 am
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

	Group Name	# of Reports	# of Users
1	Broyles Inc. group		
2	Subset #1		1