Introduction to Presentation Studio

Onboarding Guide

Morningstar Direct

Contents

Introduction to Presentation Studio

Overview

Presentation Studio offers a variety of ready-made templates users can employ for reporting, but also offers the ability to create unique templates and reports.

This guide shows users how to create an original two-page factsheet, which involves the following general process:

1. Create a template and add the correct number of pages, as well as a header with the fund's name a a firm logo.
2. Design the layout of the first page, then add charts and tables to it.
3. Design the layout of the second page, then add charts. tables, and dynamic text to it.

This template, once built, can be used for any fund, not just the one selected during the process of designing it.

The following exercises are covered:

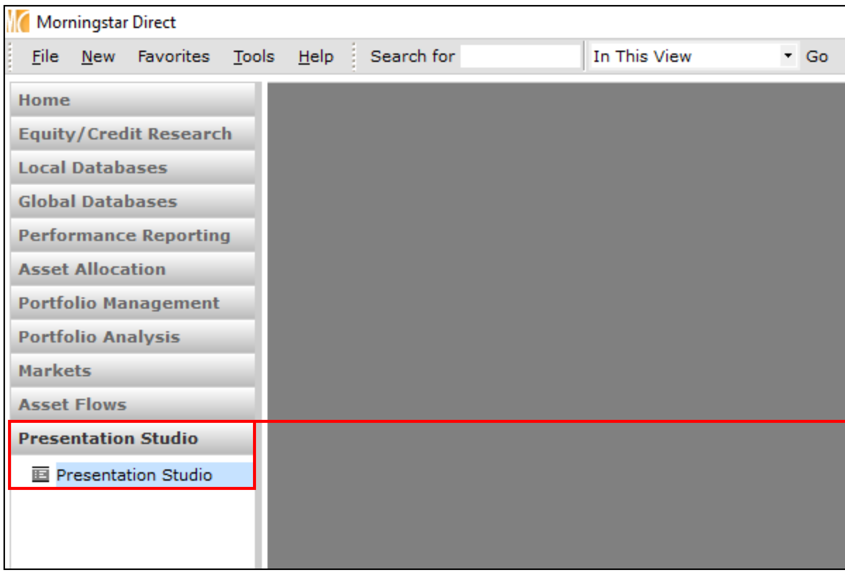
- Exercise 1: Launch a new Factsheet template (page 5)
- Exercise 2: Set up the pages for the template (page 8)
- Exercise 3: Design the layout of the first page (page 15)
- Exercise 4: Add charts and a table to the first page (page 18)
- Exercise 5: Design the layout of the second page (page 23)
- Exercise 6: Add charts and a table to the second page (page 27)

Exercise 1: Launch a new Factsheet template

A Factsheet template allows users to display information for just one investment at a time. (In contrast, a Workbook template allows users to compare multiple investments at once.) When building a template, users select a representative investment to display on the template, to ensure the data appears the way it is expected to.

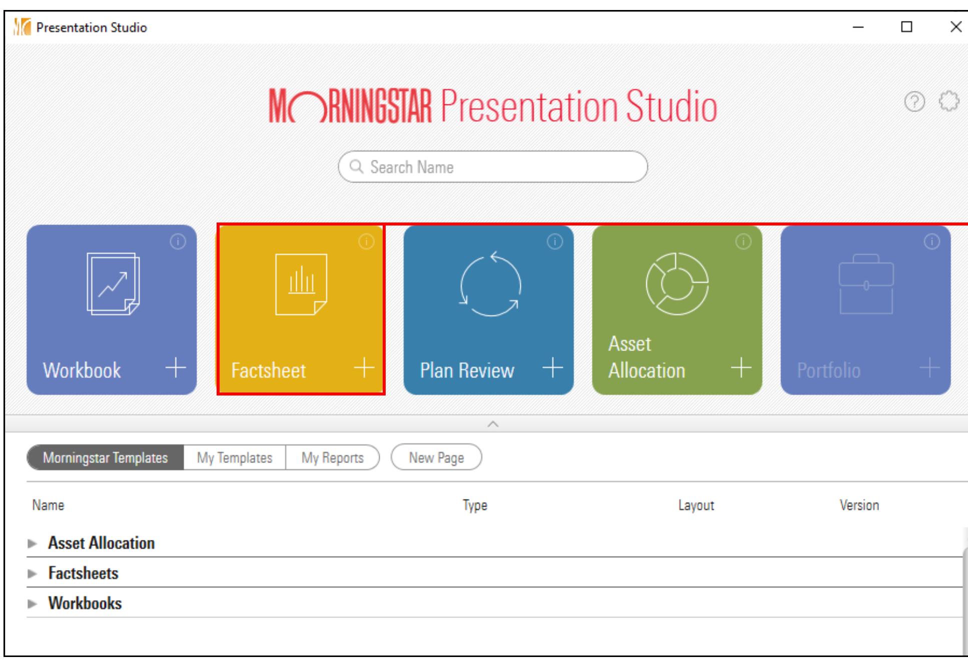
To launch a new Factsheet template by selecting an investment and configuring the benchmark to also be displayed on the report, do the following:

1. Select the **Presentation Studio** module. A new window opens.



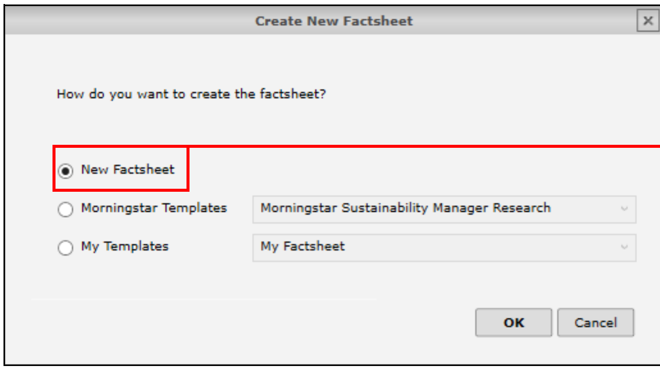
Selecting this module simply opens a new window where content can be created and accessed.

2. Click the **Factsheet** tile. The Create New Factsheet dialog box opens.



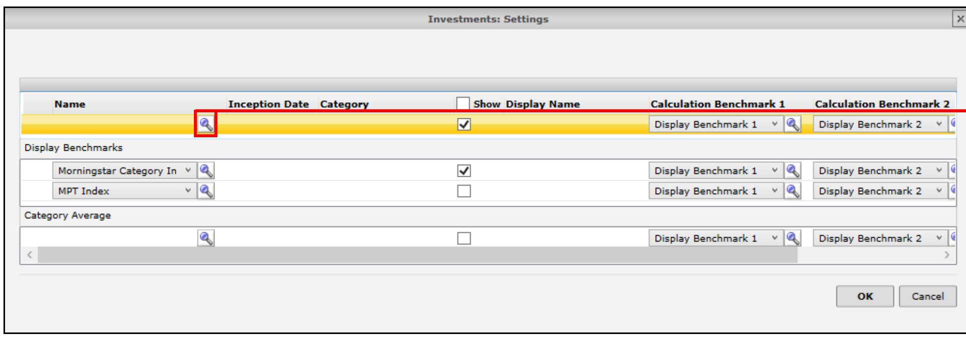
This guide shows users how to create this type of template.

3. The option for New Factsheet should be selected. Click **OK**. The Investments: Settings dialog box opens.



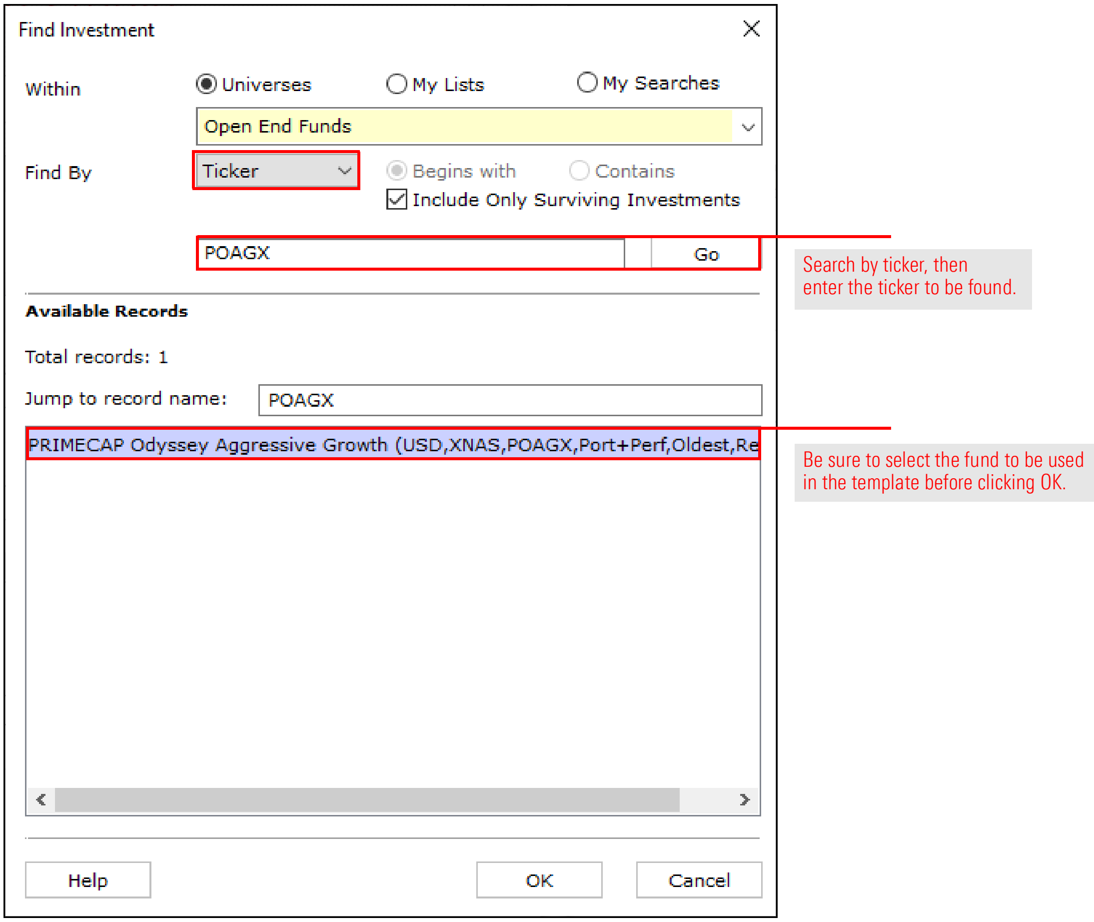
Be sure this option is selected before clicking OK.

4. In the Name field, click the **magnifying glass** icon. The Find Investment dialog box opens.

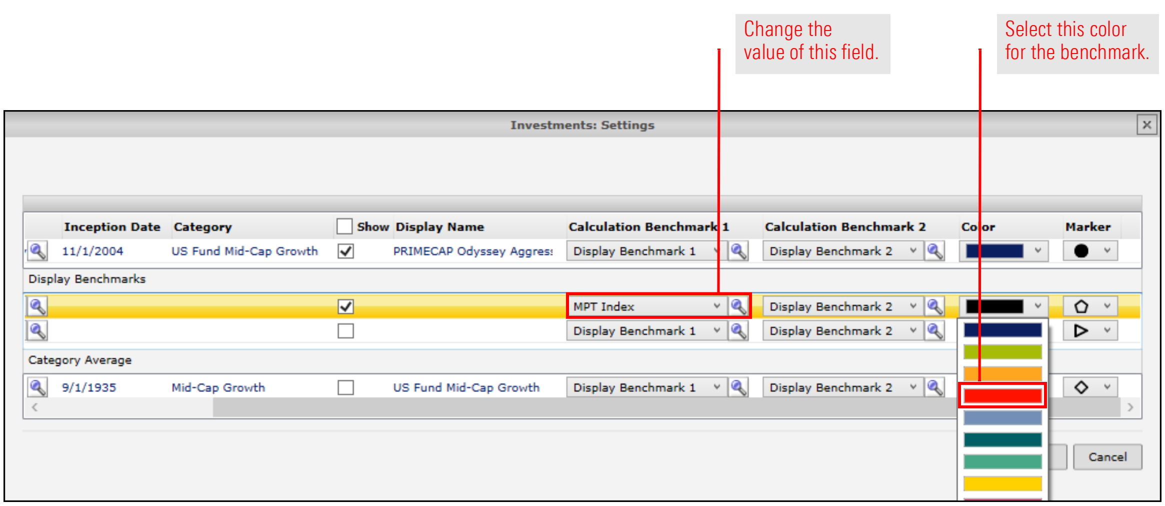


Use this icon to look for an investment to select to display on the template as it is being built.

5. Change the **Find By** drop-down field to **Ticker**.
6. Search for **POAGX**, then click **Go**.
7. Select the **fund**, then click and **OK**.



8. Under the Display Benchmarks area, change the **Calculation Benchmark 1** to **MPT Index**, then scroll right to change the benchmark's color to **red**.



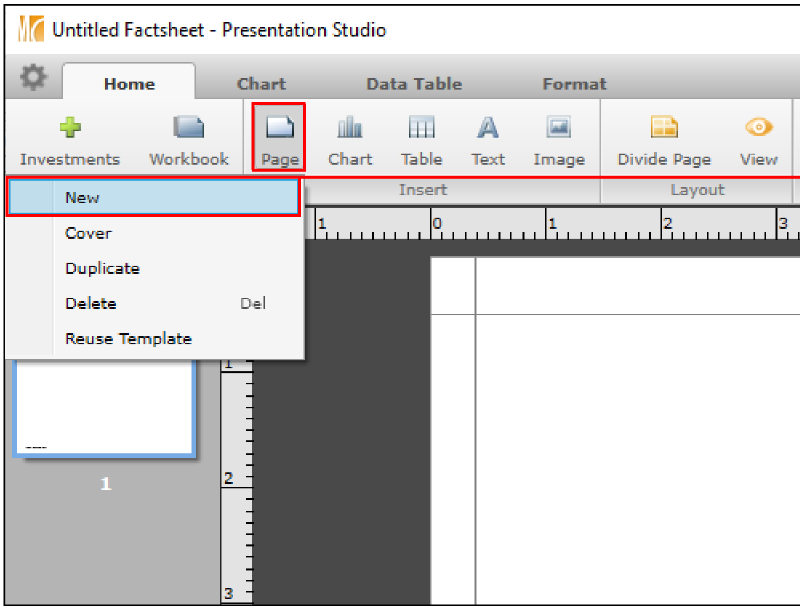
9. Click **OK**. A blank page opens.

Exercise 2: Set up the pages for the template

This template will have two pages, and include a header that repeats at the top of each page. A logo will be included on the report, so be sure to have a graphic file (such as your firm's logo in .jpg, .gif, or .png format) available to you.

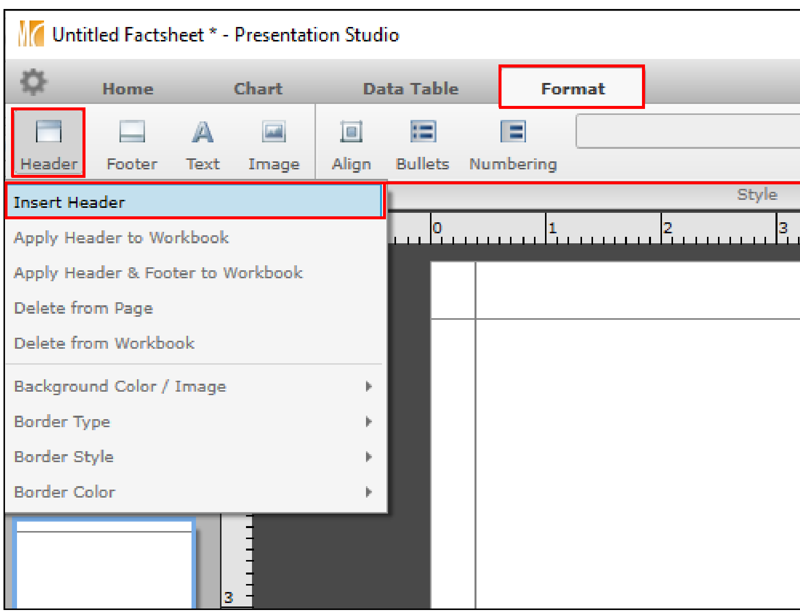
To makes these changes to the template, do the following:

1. From the toolbar, click **Page** > **New**. A second page is added.



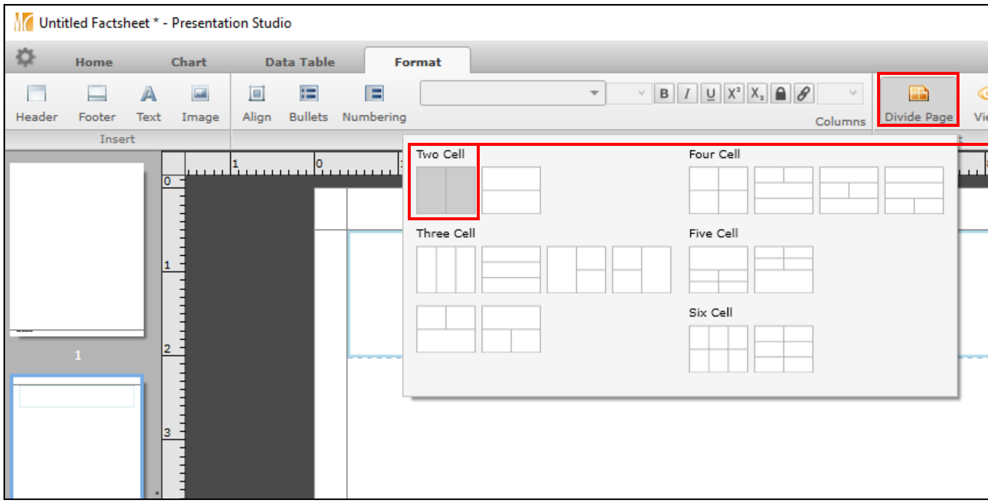
Use the Page icon to add various types of pages to a template.

2. To add a header to each page, from the **Format** tab, click **Header** > **Insert Header**.



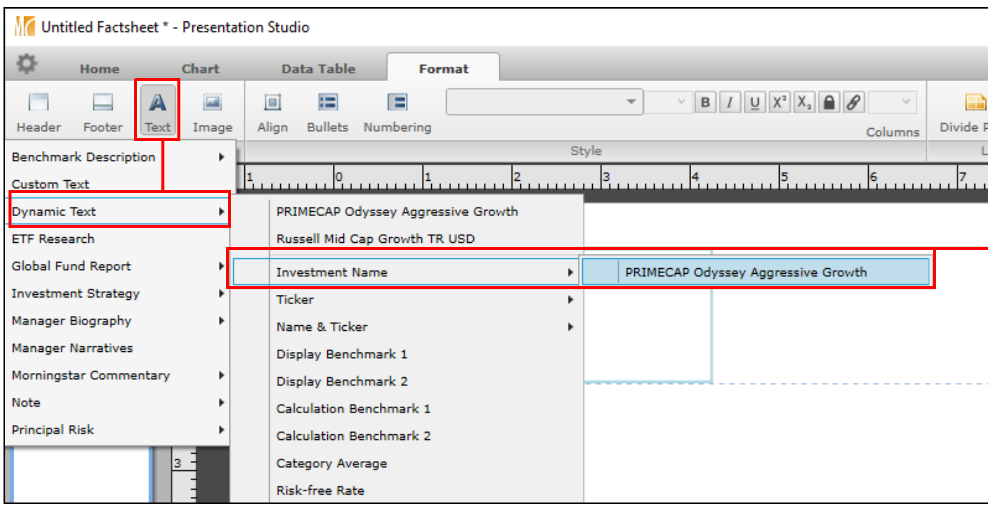
The Format tab must be selected to be able to insert a header or footer into a template.

3. From the toolbar, click **Divide**, then select the **two-cell option with the vertical divider**.



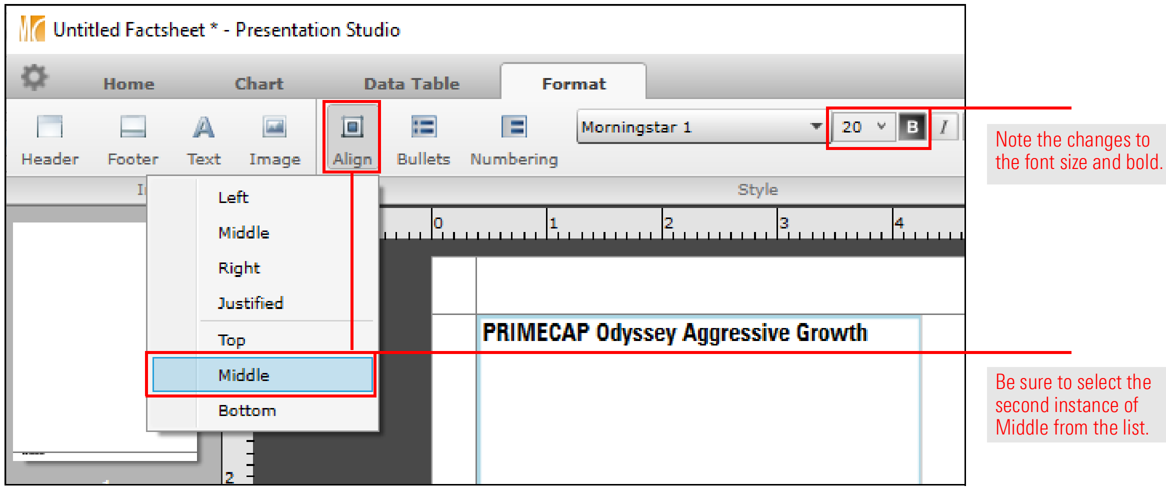
The Divide Page icon offers a variety of ways to split up a page or cell.

4. The left side of the header should be selected. From the toolbar, click **Text** > **Dynamic Text** > **Investment Name** > **PRIMECAP Odyssey Aggressive Growth**.

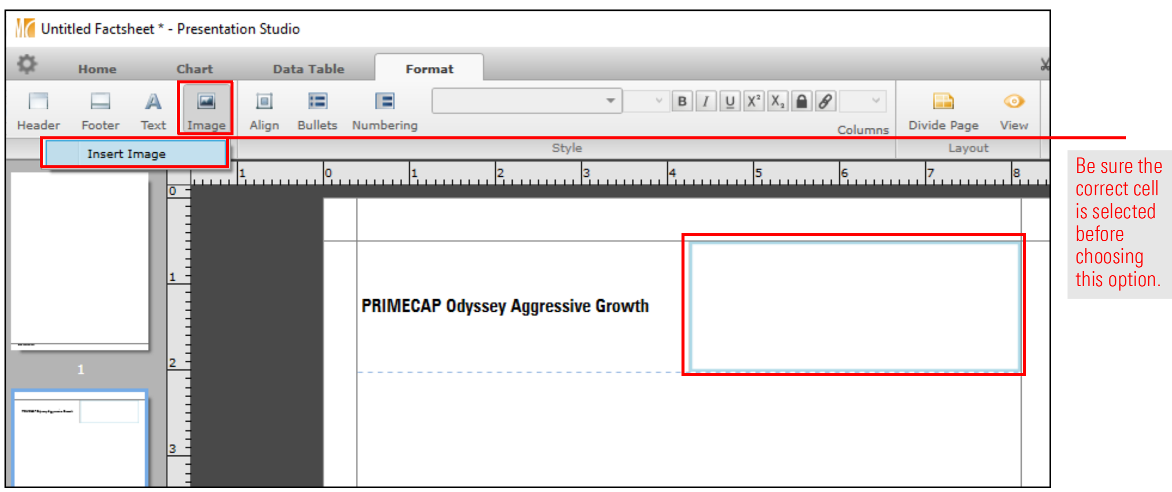


Be sure to select this specific path to have the template dynamically change the name of the investment in the header whenever the report is run.

5. From the toolbar, set the **font size** to **20** and apply the **bold** setting.
6. From the toolbar, select **Align** > **Middle**.

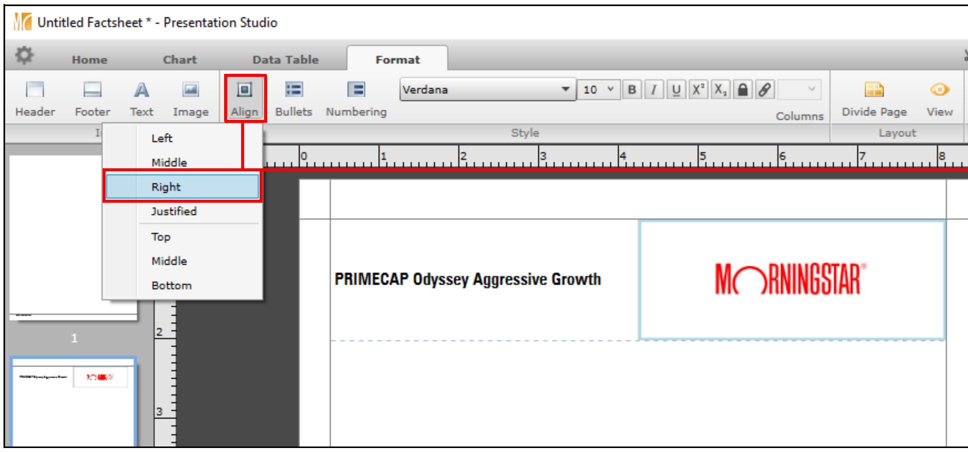


7. Select the right side of the header.
8. From the toolbar, click **Image** > **Insert Image**. The Open dialog box opens.



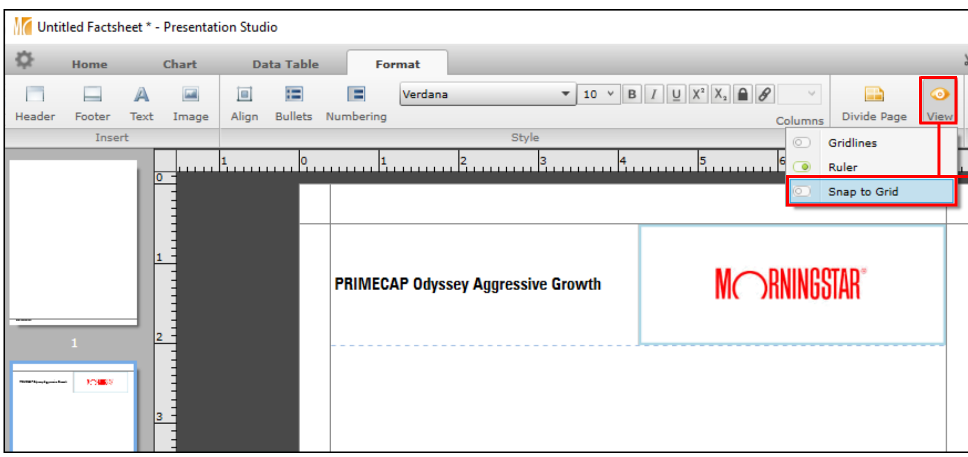
9. Select your **firm's logo** then click **Open**.

10. From the toolbar, click **Align** > **Right**.



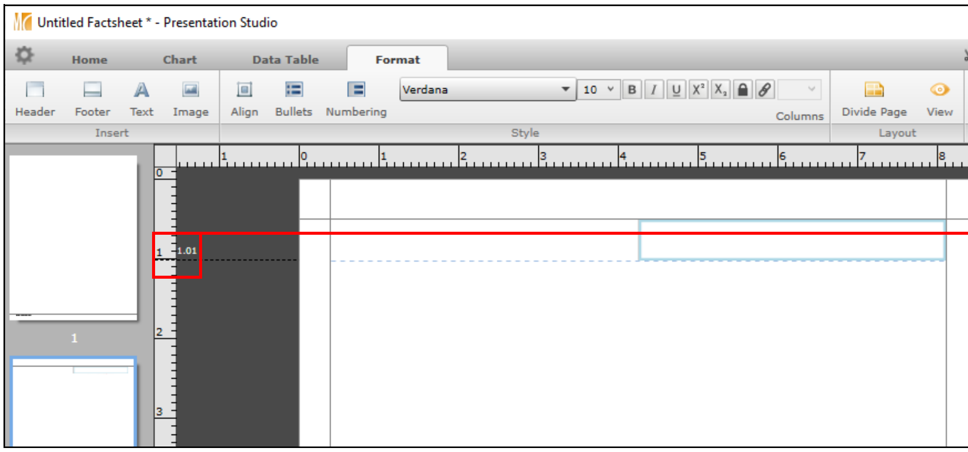
Use this command to shift the logo to the right side of the cell.

11. When resizing cells by dragging a border up or down or left and right, the Snap to Grid tool ensures users need not be overly precise in moving a border exactly to a location ending in .0 or .5 (for example, the 1.0 inch mark, or the 7.5 inch mark). Once the border is close to that location, simply release the mouse button, and the border will automatically snap to the correct location. To turn on this function, from the toolbar select **View** > **Snap to Grid**.



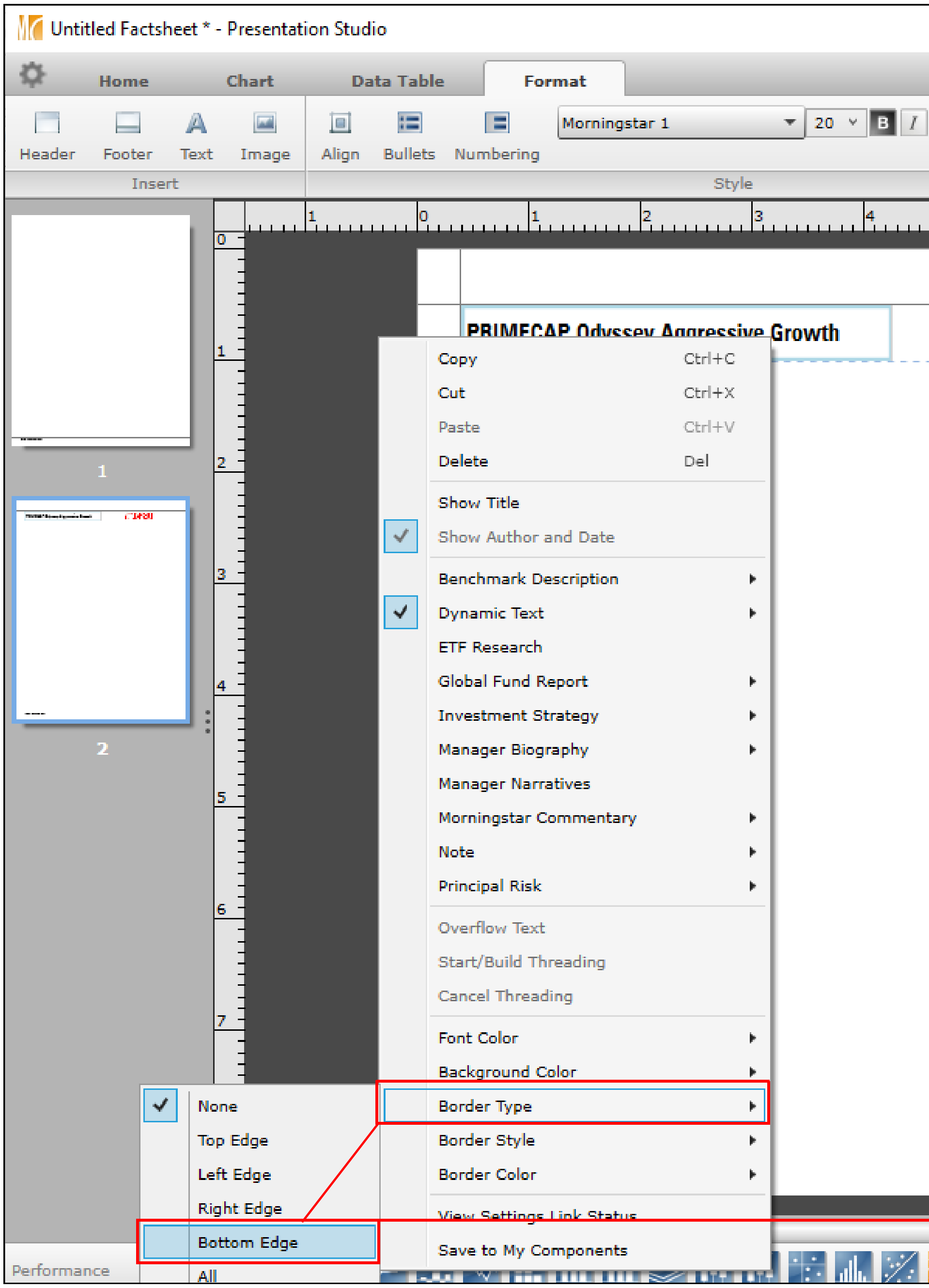
Select this option to make it easier to change the position of a cell's border.

12. **Drag** the **bottom border** of the header up to the **1.00 inch** mark.



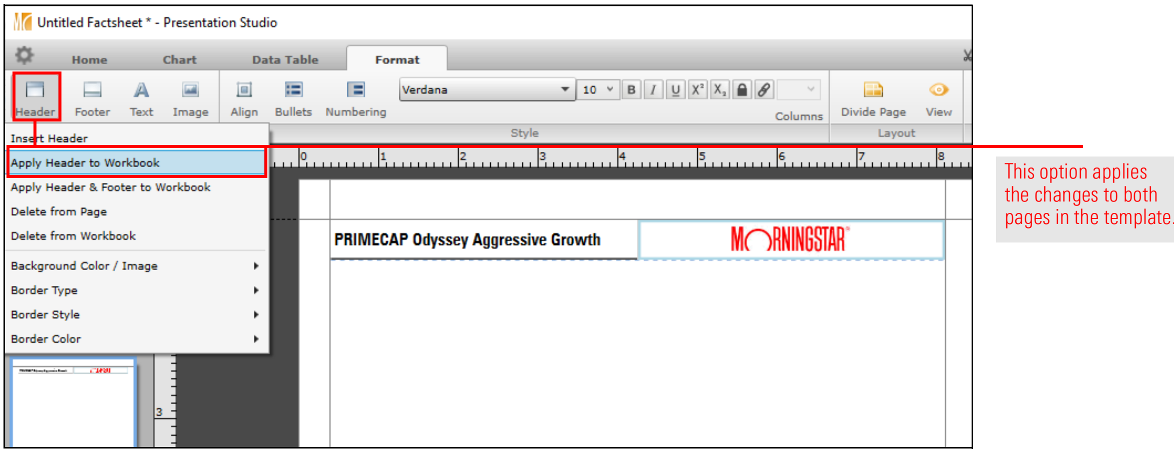
Remember, with the Snap to Grid feature enabled, the placement of the border only needs to be close to where it should go.

13. **Right-click** on each cell in the header and select **Border Type** > **Bottom Edge**.



Repeat this step from the right-click menu for both header cells.

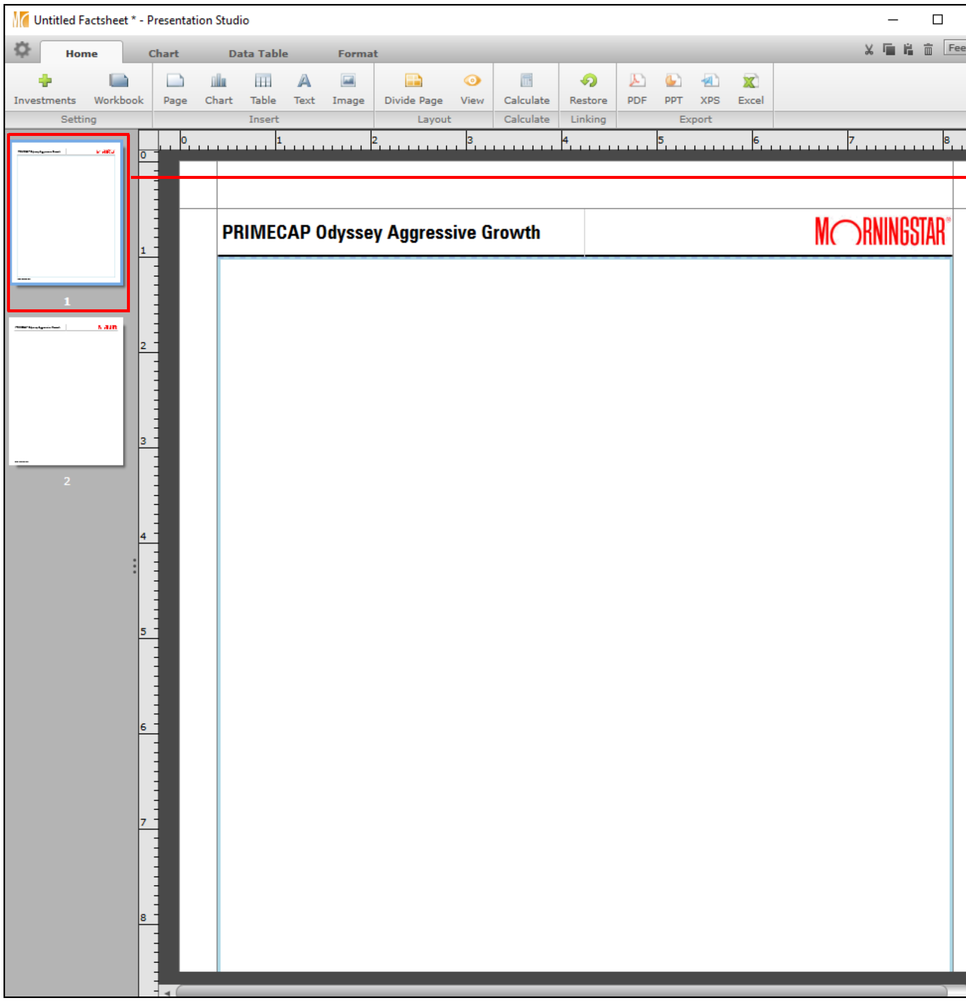
14. From the toolbar, click **Header** > **Apply Header to Workbook**.



Exercise 3: Design the layout of the first page

Now that the template has both the pages and header it needs, the next step is to add various performance, risk, and other components to the first page. To add these charts and tables, do the following:

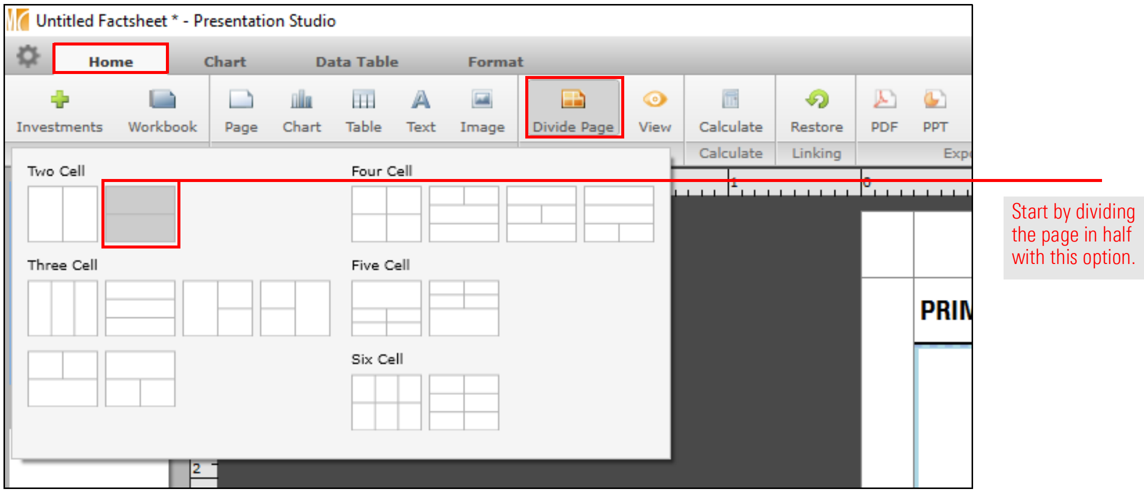
1. Be sure the **first page** is selected.
2. Select the **main cell** on the page.



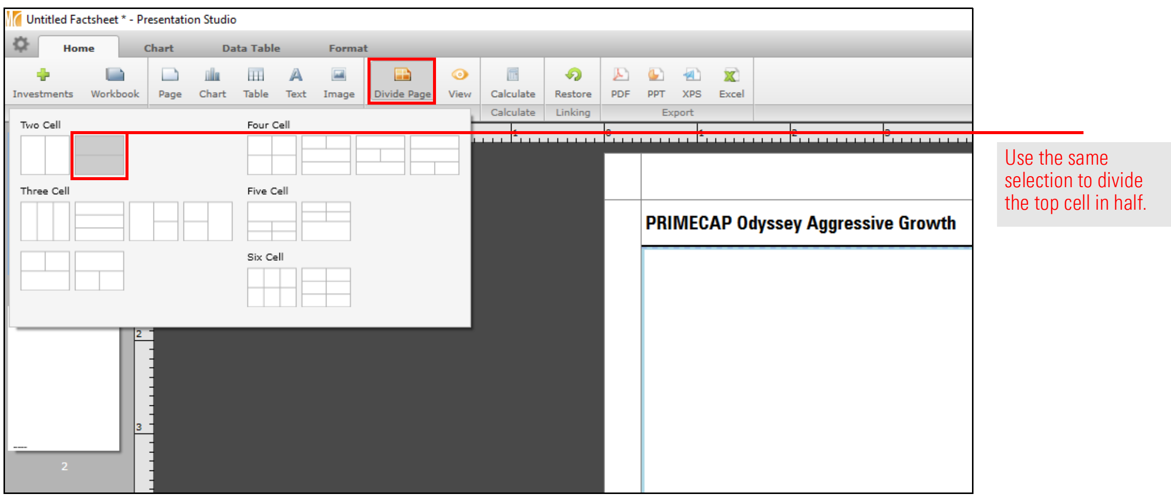
Always be sure the correct page and cell is selected before making layout changes. The blue highlight indicates which cell is selected.

3. The **Home** tab should be selected.

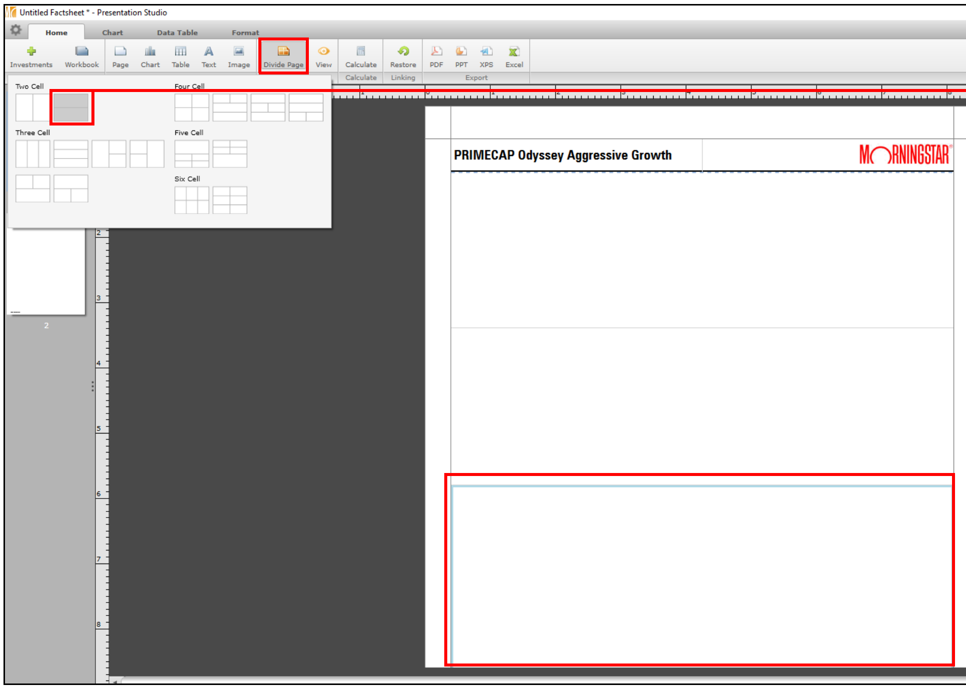
4. From the toolbar, click **Divide Page** > select the **two-cell option with the horizontal border**.



5. Each half of the page will again be divided in two. The **top cell** should be selected. Click **Divide Page** > select the **two-cell option with the horizontal border**.

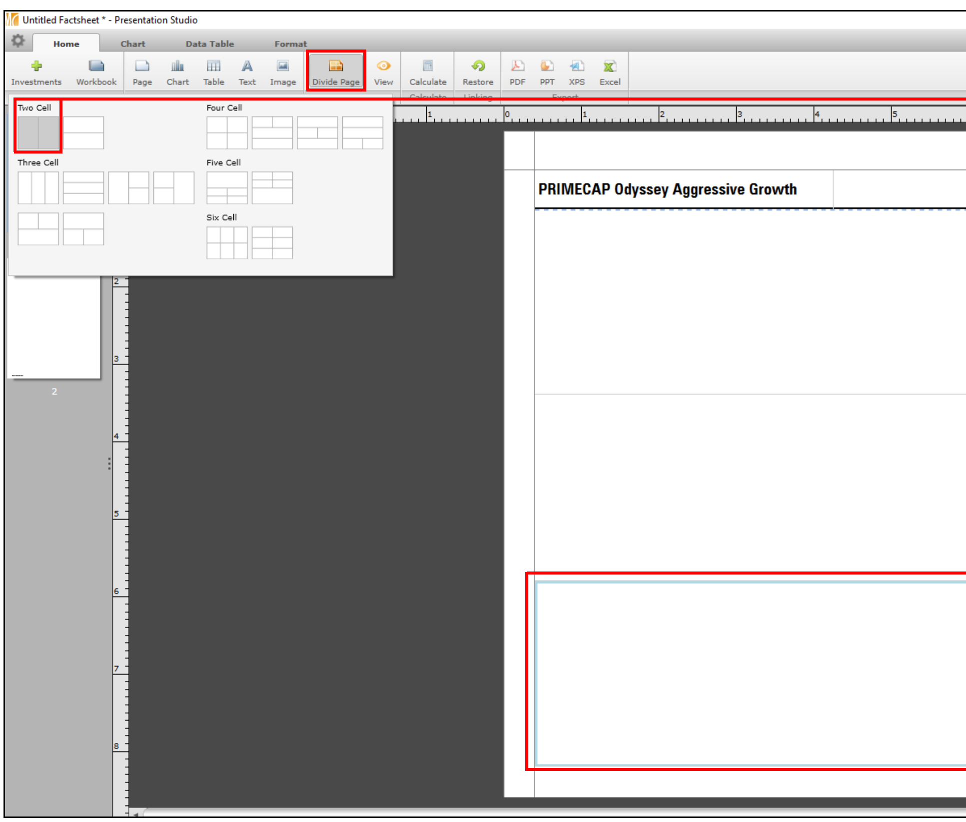


6. Select the **bottom cell**, then click **Divide Page** > select the **two-cell option with the horizontal border**. The page now has four sections.



Be sure the cell at the bottom of the page is selected before choosing this option.

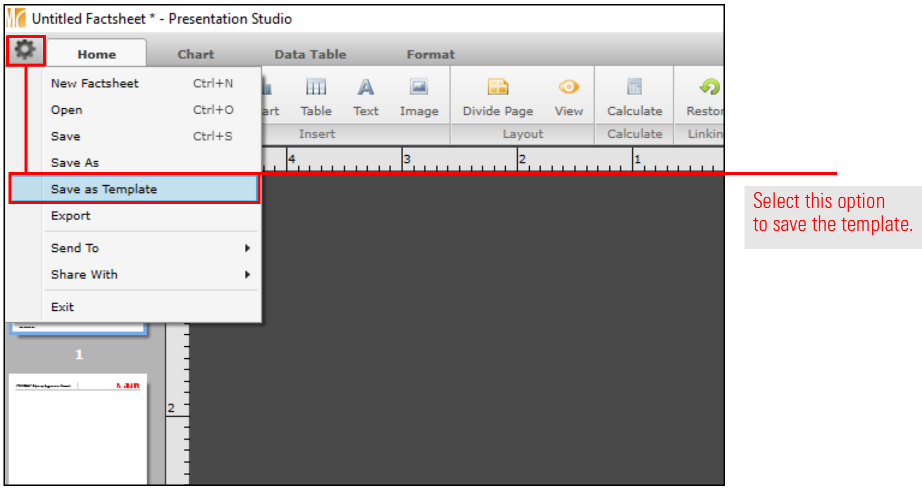
7. The **third cell from the top** should be selected. Click **Divide Page** > select the **two-cell option with the vertical border**. A total of five cells are now available on the first page.



Be sure the correct cell is selected, and note the cell option to select.

8. To save this template, click the **icon** in the upper-left corner of the screen and select **Save as Template**.

   Note: Saving an item as a Report retains not just the page layouts but also the chosen security and benchmark settings. Saving an item as a Template, in contrast, retains the chosen charts and tables, layout, font, currency, colors, logos, disclaimers, and custom and dynamic text. It does not preserve any investment or benchmark selections; these will need to be reselected each time the template is opened.

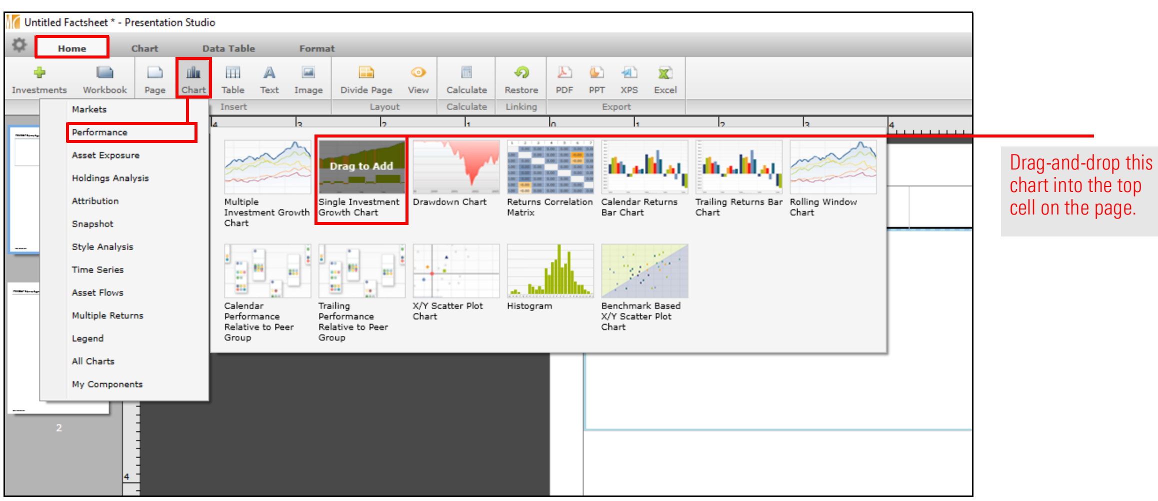


9. Name the template **My Fund Analysis**, then click **Save**.
10. When the confirmation message opens, click **OK**.

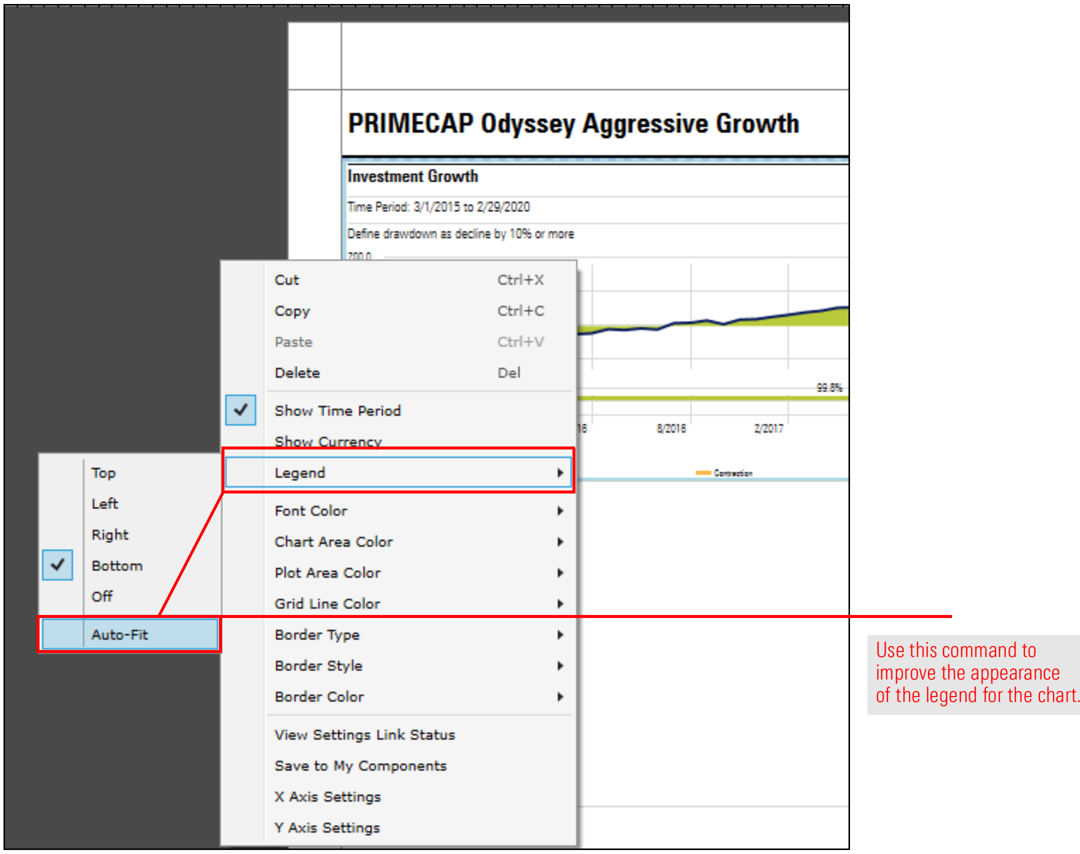
Exercise 4: Add charts and a table to the first page

Now that the first page is correctly divided into the proper number of sections, the next step is to drag-and-drop different charts and tables into each section. Do the following:

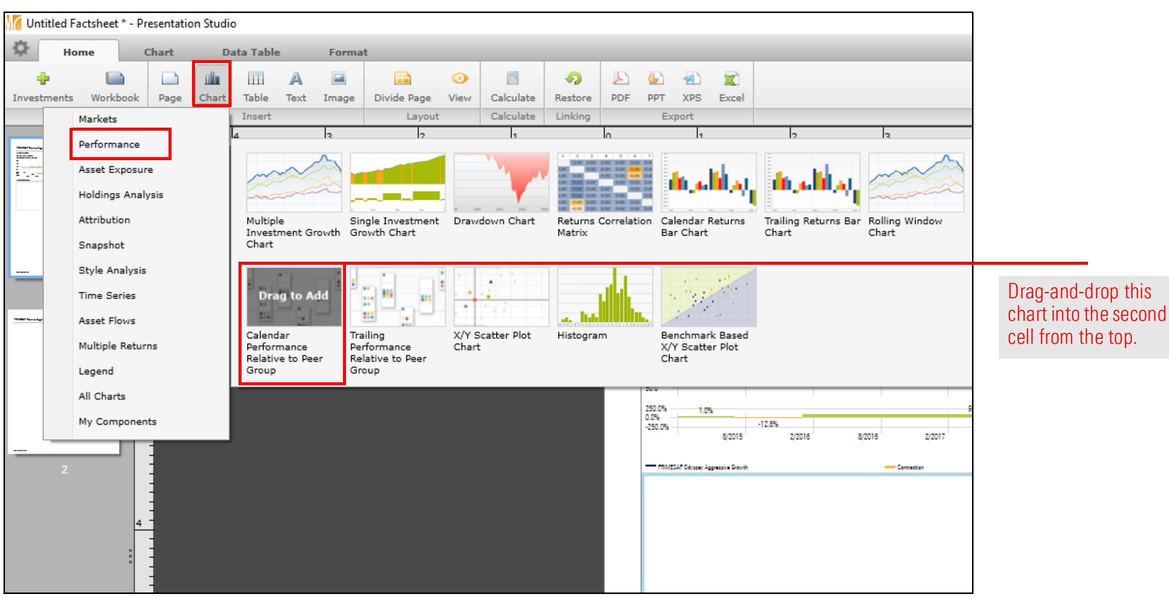
1. The Home tab should be selected. For the top cell, click **Chart** > **Performance**, then **drag-and-drop** the **Single Investment Growth Chart** into the cell. Note that the Chart tab is now selected at the top of the window.



2. **Right-click** on the chart, then select **Legend** > **Auto-Fit**. Note how the legend becomes more readable.

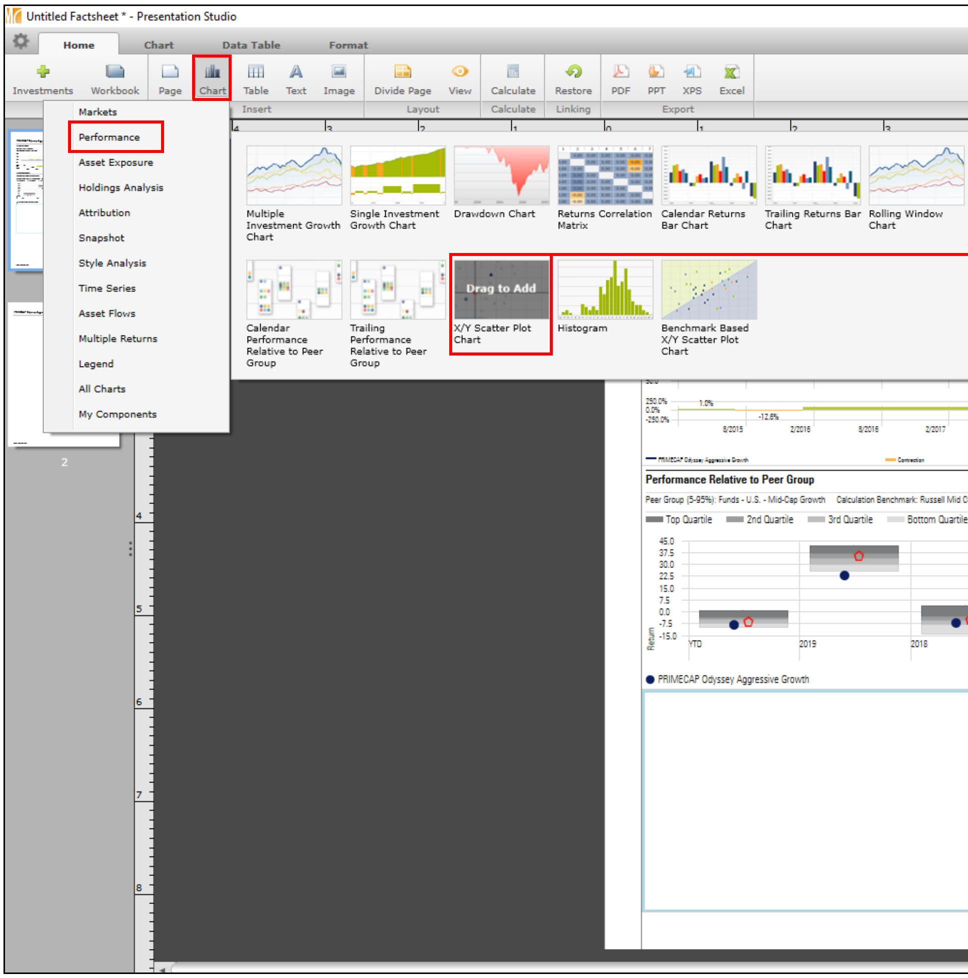


3. Select the **second cell from the top**. The Home tab is now selected.
4. Click **Chart** > **Performance**, then **drag-and-drop** the **Calendar Performance Relative to Peer Group** chart into the cell.



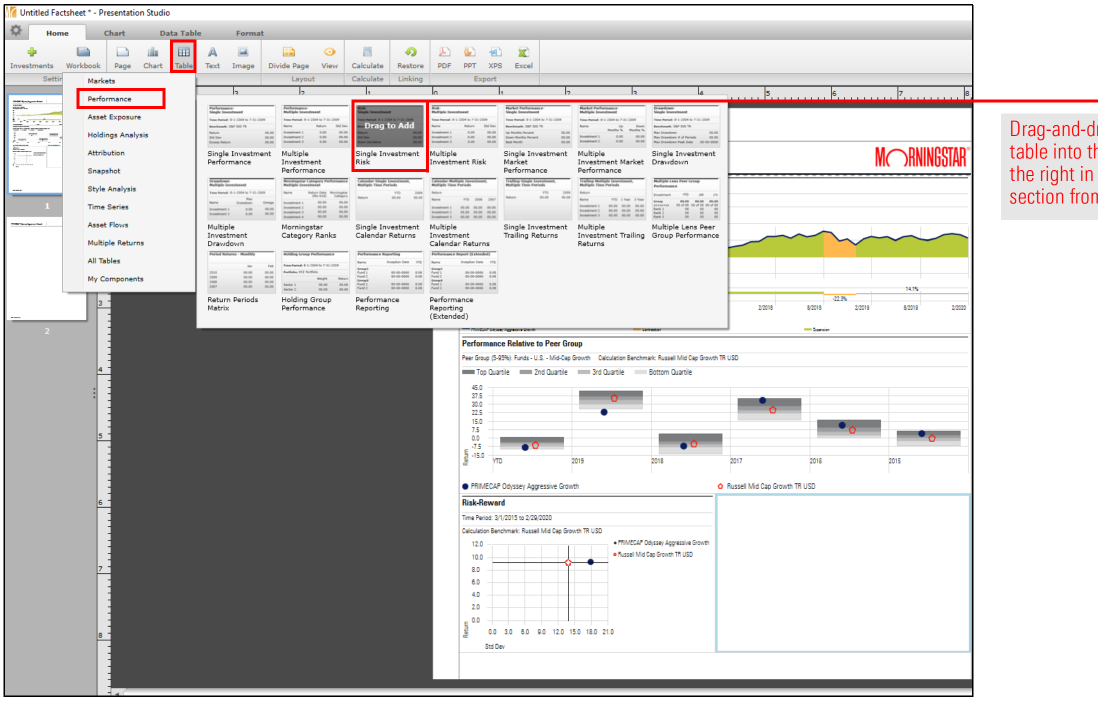
5. If needed, click **Calculate**.

6. **Right-click** on the chart, then select **Legend** > **Auto-Fit**. Note how the legend becomes more readable.
7. Select the **cell on the left in the next section down**. The Home tab is now selected.
8. Click **Chart** > **Performance**, then **drag-and-drop** the **X/Y Scatter Plot Chart** into the cell.



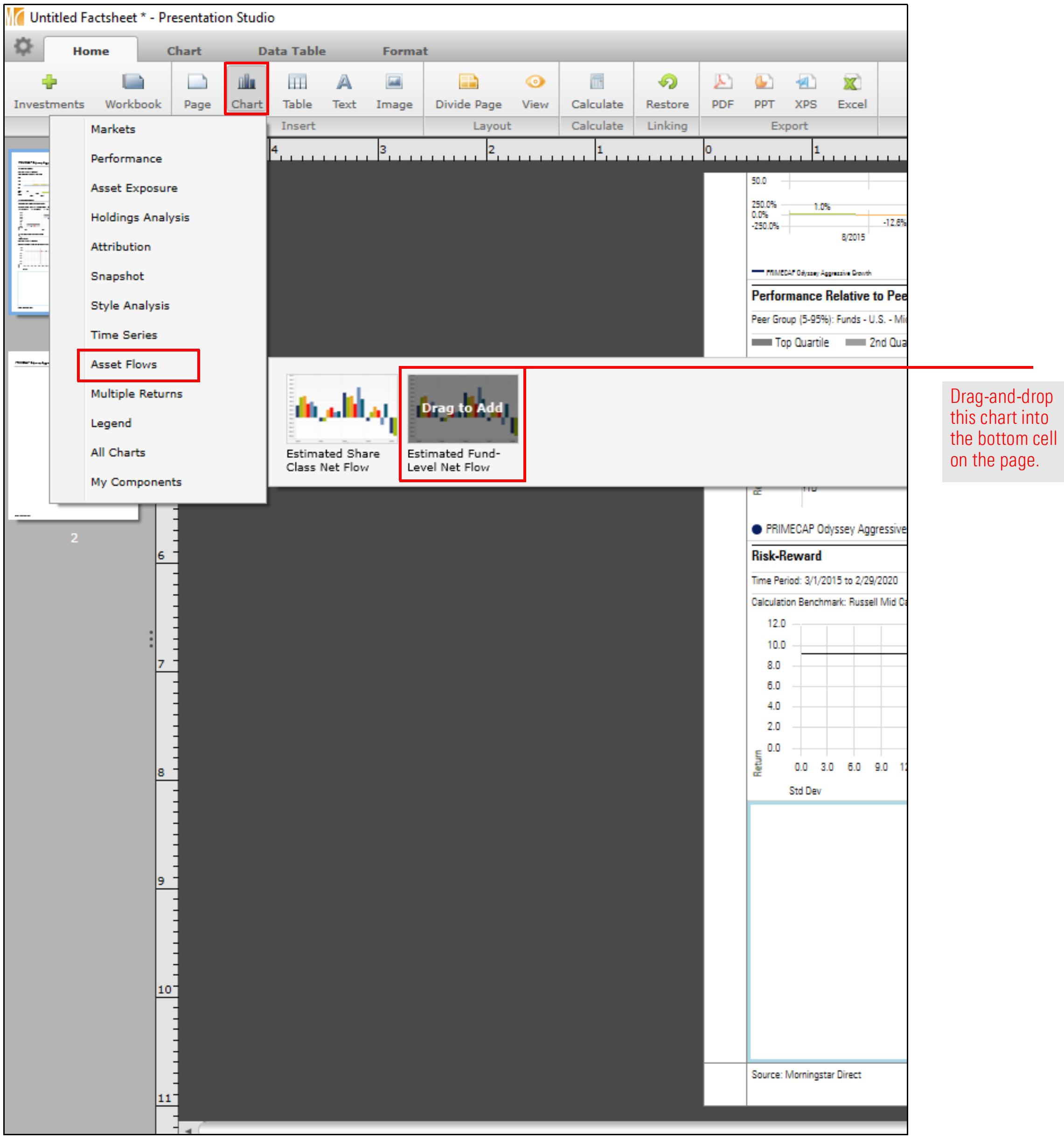
Be sure to drag-and-drop this chart into the cell on the left in the third section from the top.

9. Select the **cell on the right in the next section down**. The Home tab is now selected.
10. Click **Table** > **Performance**, then **drag-and-drop** the **Single Investment Risk table** into the cell. Note that the Data Table tab is now selected.



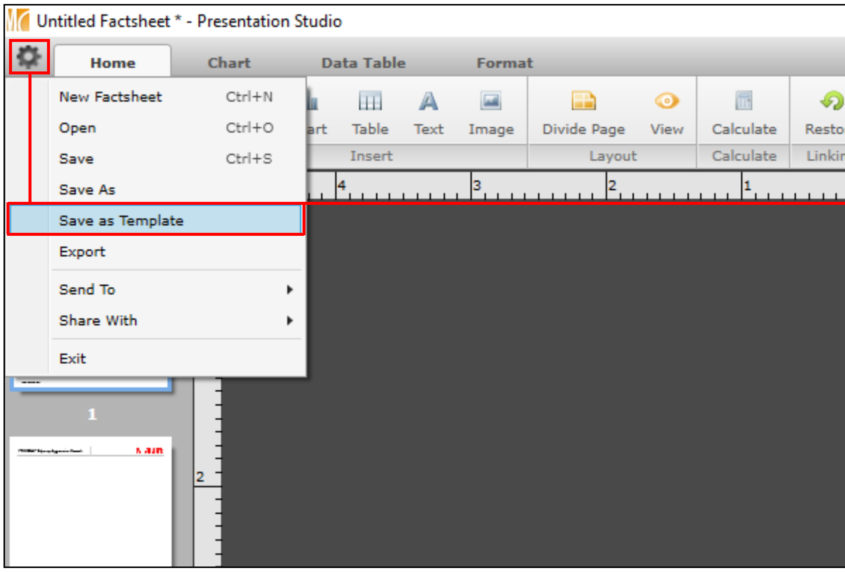
Drag-and-drop this table into the cell on the right in the third section from the top.

11. Select the **cell at the bottom of the page**. The Home tab is now selected.
12. Click **Chart** > **Asset Flows**, then **drag-and-drop** the **Estimated Fund-Level Net Flows chart** into the cell.



13. **Right-click** on the chart, then select **Legend** > **Auto-Fit**.

14. Save the latest changes to the template by clicking the **icon** in the upper-left corner of the screen and select **Save as Template**.



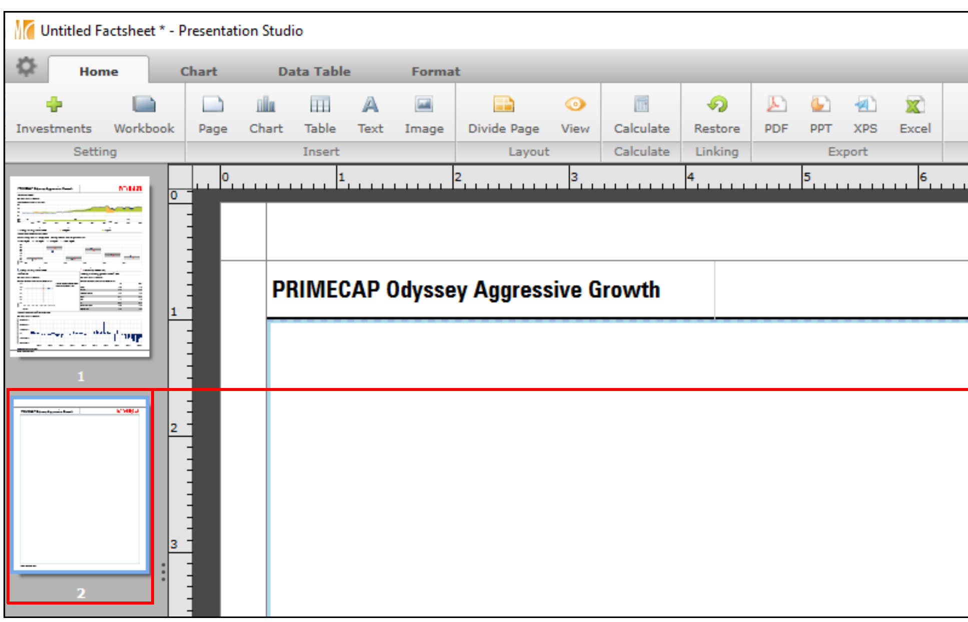
It is recommended to save changes to a template often, to avoid losing work.

15. Select the **My Fund Analysis** template saved previously, then click **Save**.
16. When the overwrite message opens, click **Yes**, then click **OK**.

Exercise 5: Design the layout of the second page

As with the first page, the second page will be divided into four sections. The top two sections will be subdivided further. To make these changes, do the following:

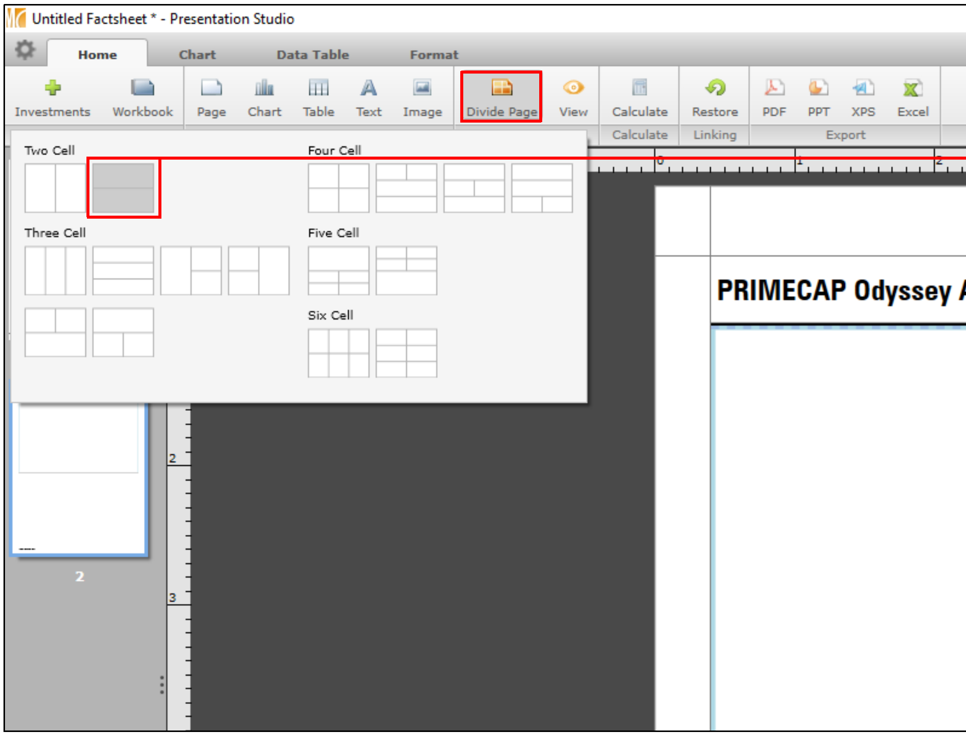
1. From the navigation pane on the left, select **page 2**.
2. Select the **main cell** on the page.



Be sure the correct page is selected and the main cell as well.

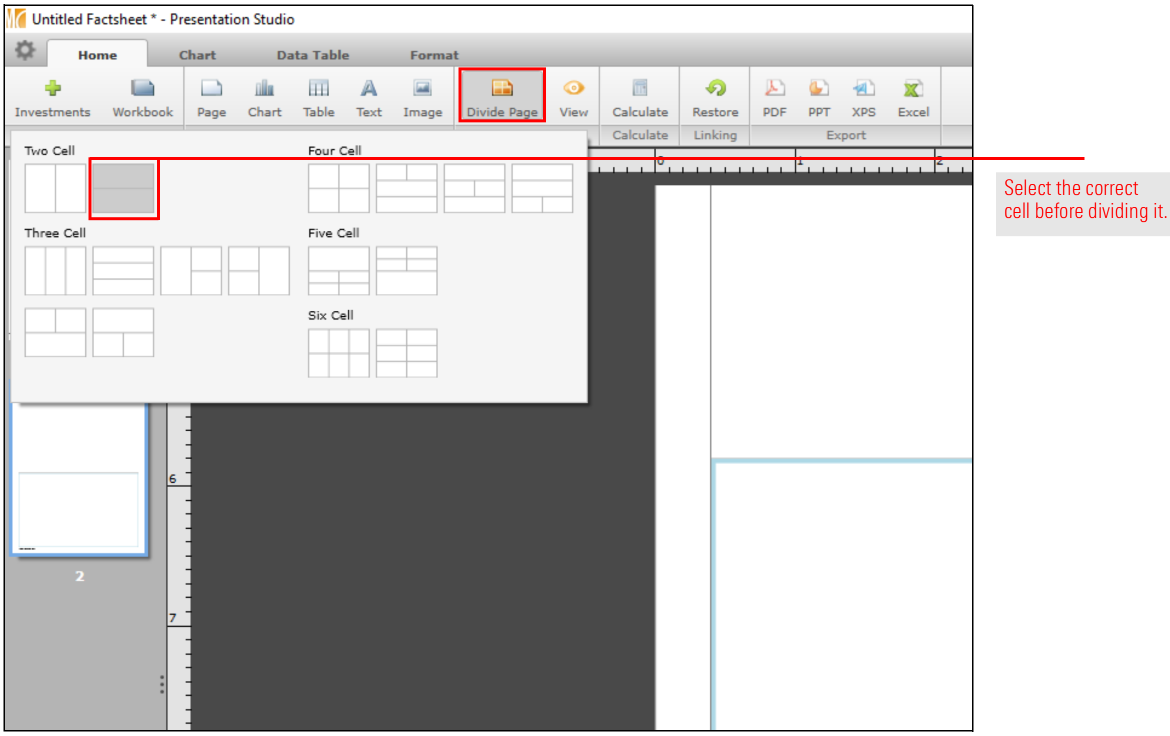
3. The **Home** tab should be selected.

4. From the toolbar, click **Divide Page** > select the **two-cell option with the horizontal border**.
5. Select the **top cell**, then click **Divide Page** > select the **two-cell option with the horizontal border**.

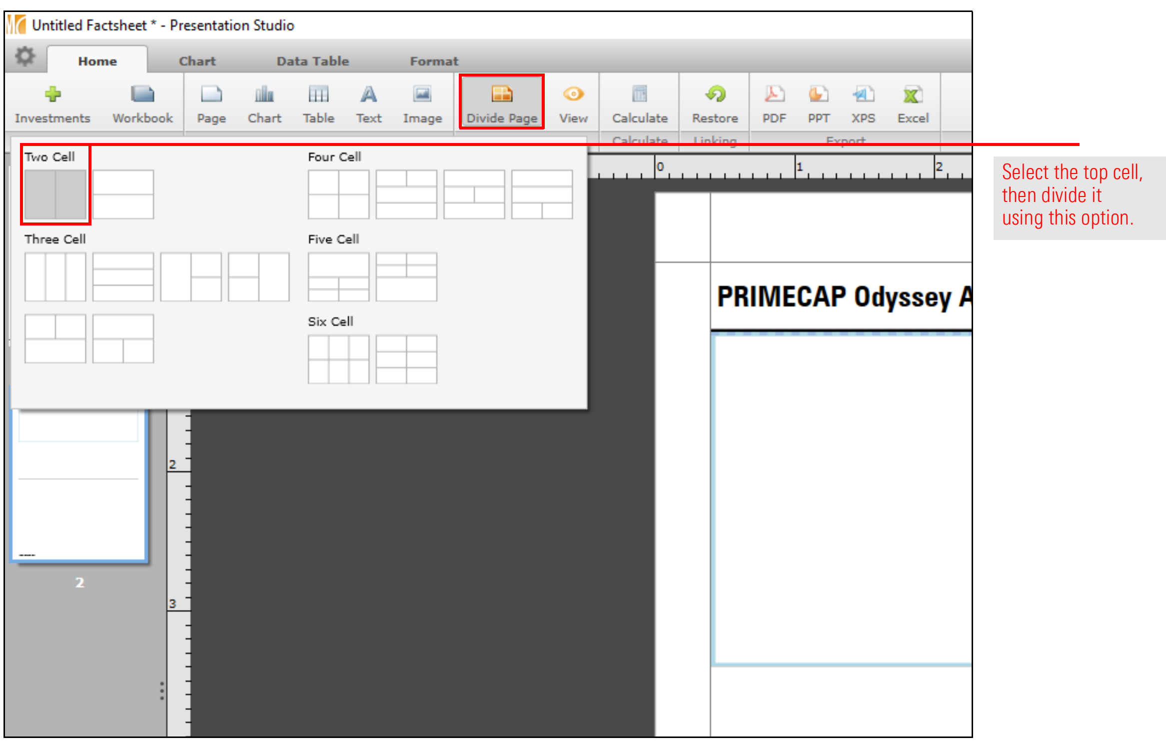


Use this option twice to split the top half of the page in two.

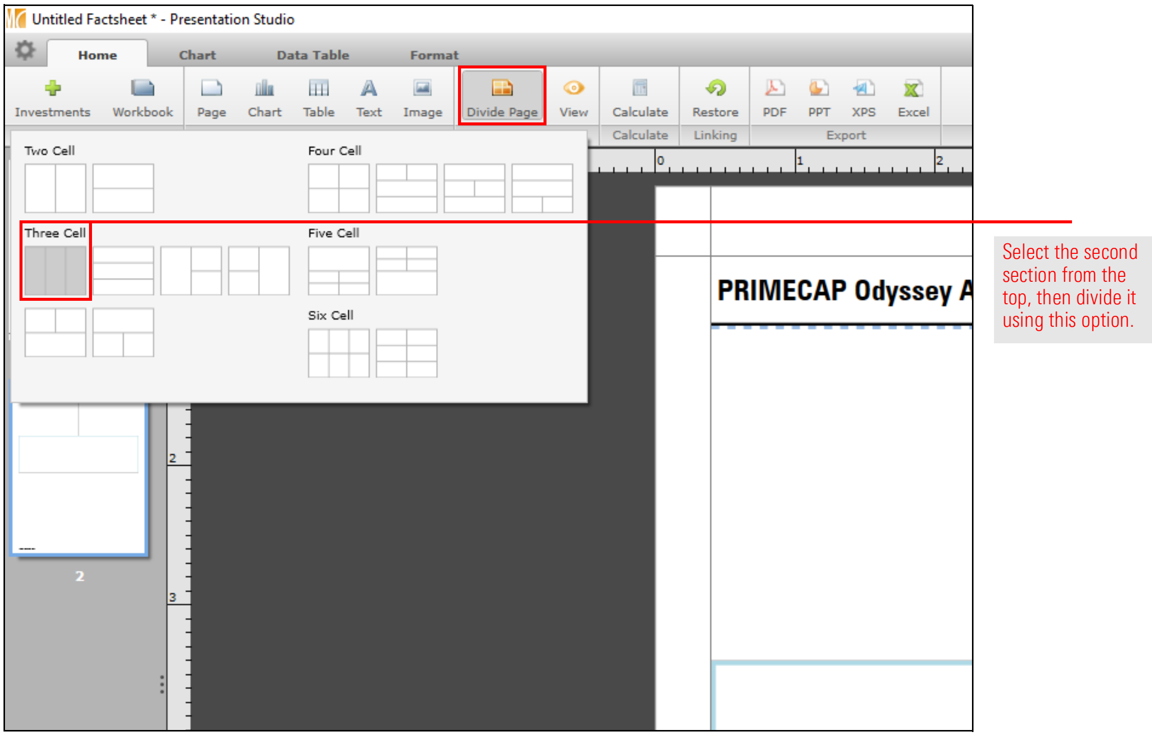
6. Select the **bottom cell**, then click **Divide Page** > select the **two-cell option with the horizontal border**. The page now has four sections.



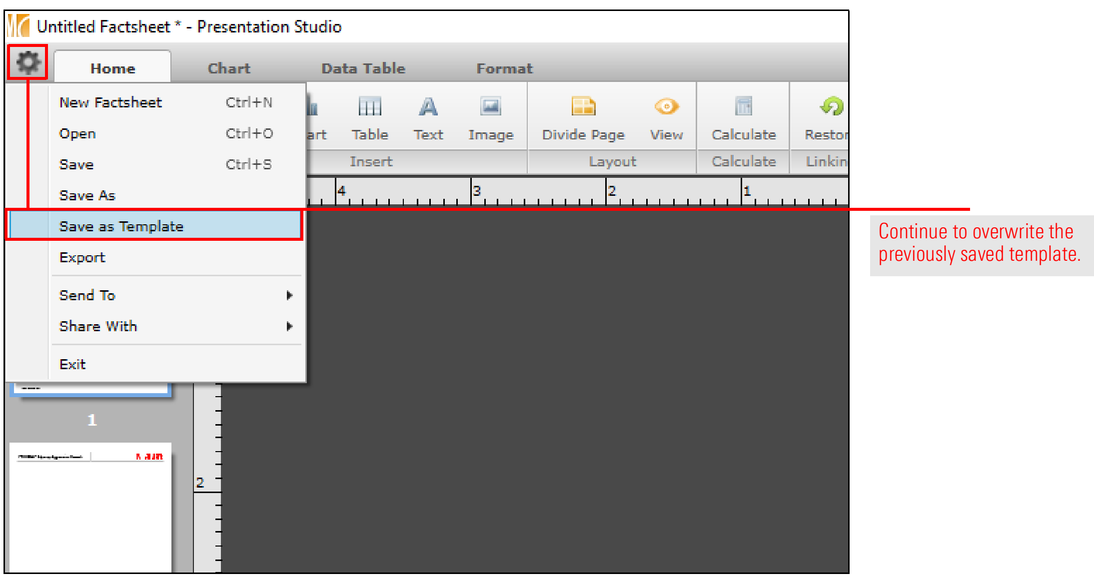
7. Select the **top cell**, then select **Divide Page** > select the **two-cell option with the vertical border**.



8. Select the second cell from the top, then click **Divide Page** > select the **three-cell option with the two vertical borders**.



9. Save the template by clicking the **icon** in the upper-left corner of the screen and select **Save as Template**.

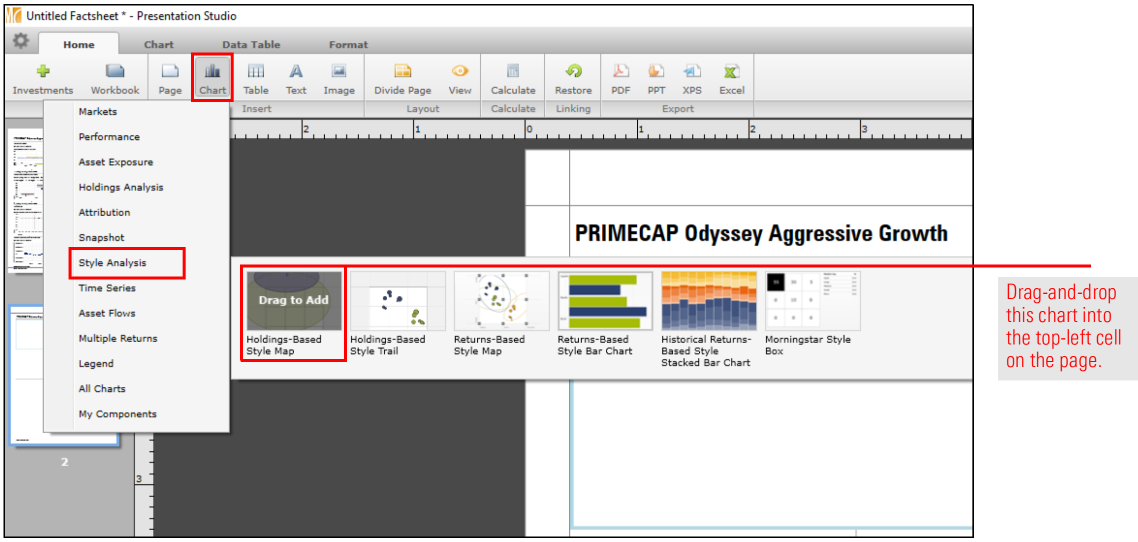


10. Select the **My Fund Analysis** template saved previously, then click **Save**.
11. When the overwrite message opens, click **Yes**, then click **OK**.

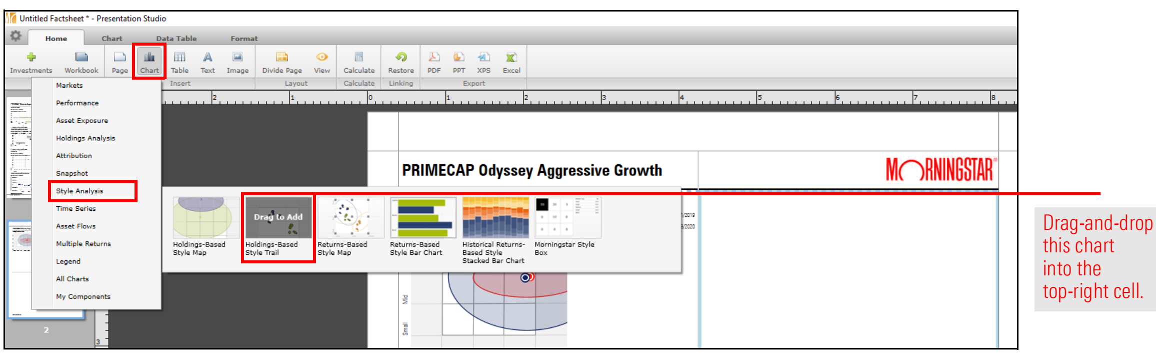
Exercise 6: Add charts and a table to the second page

The second page will be comprised of a number of portfolio style and exposure charts, top holdings in the fund, and its investment objective. To add these components, do the following

1. In the **top section**, select the **cell on the left**.
2. Click **Chart** > **Style Analysis**, then **drag-and-drop** the **Holdings-Based Style Map** chart into the cell.

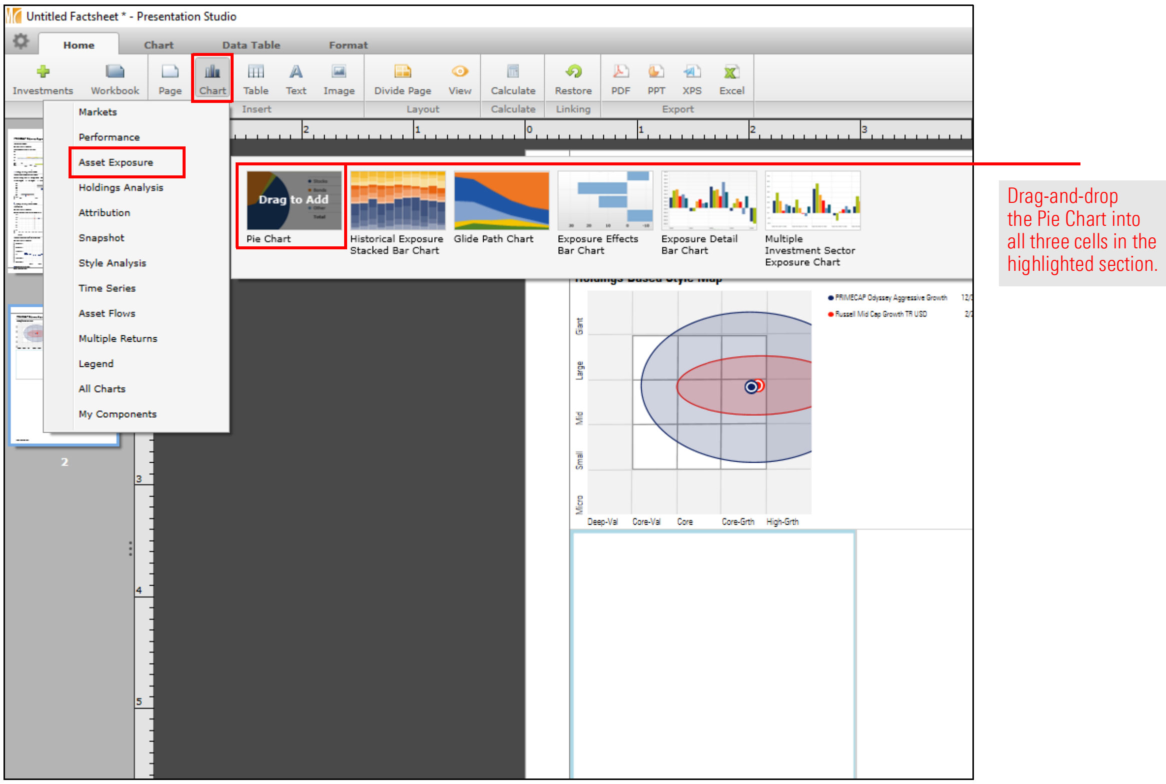


3. Select the **top-right cell**.
4. Click **Chart** > **Style Analysis**, then **drag-and-drop** the **Holdings-Based Style Trail** chart into the cell.

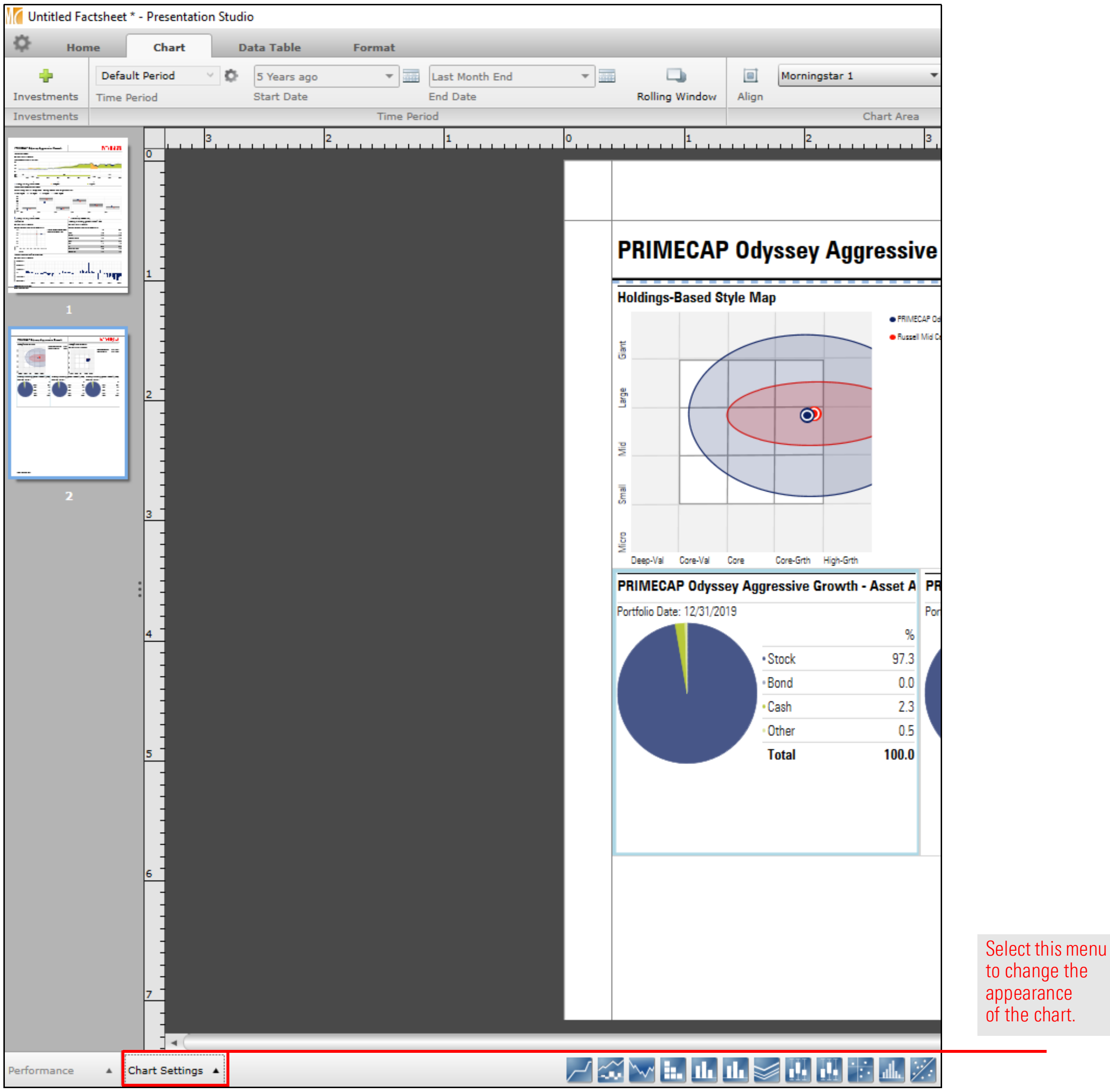


5. Select the **first cell in the second section**.
6. Click **Chart** > **Asset Exposure**, then **drag-and-drop** the **Pie Chart** into all three cells.

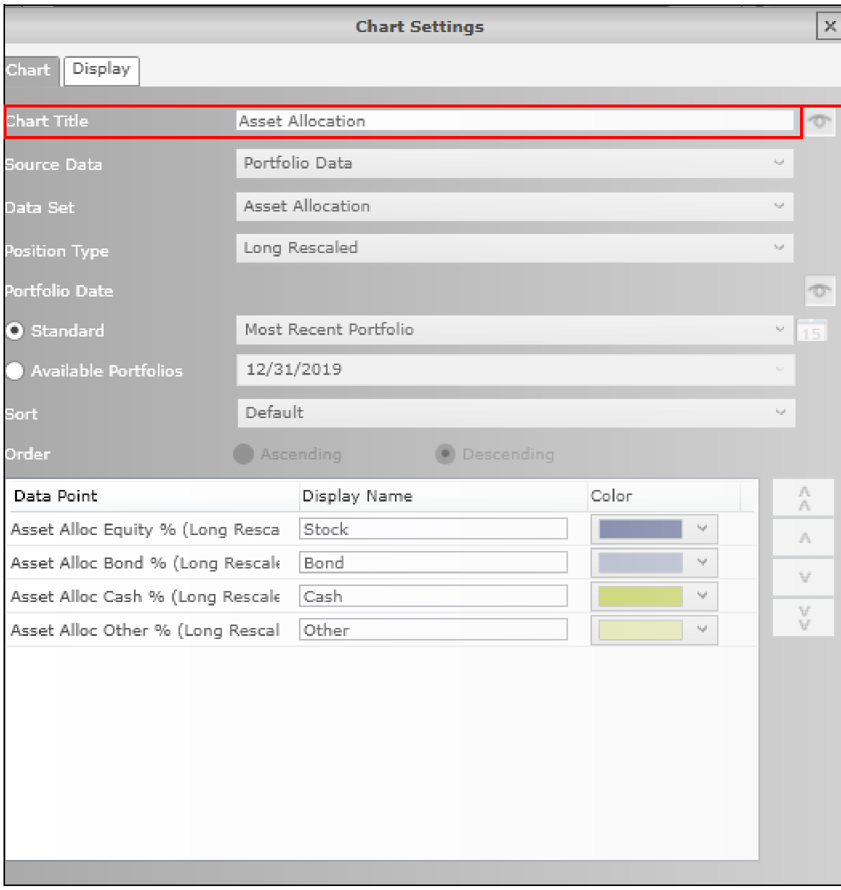
☞ Note: Another option is to simply copy and paste the pie chart from first cell into the other two cells in that section.



7. Select the **pie chart on the left**.
8. In the bottom-left corner of the window, click **Chart Settings**.



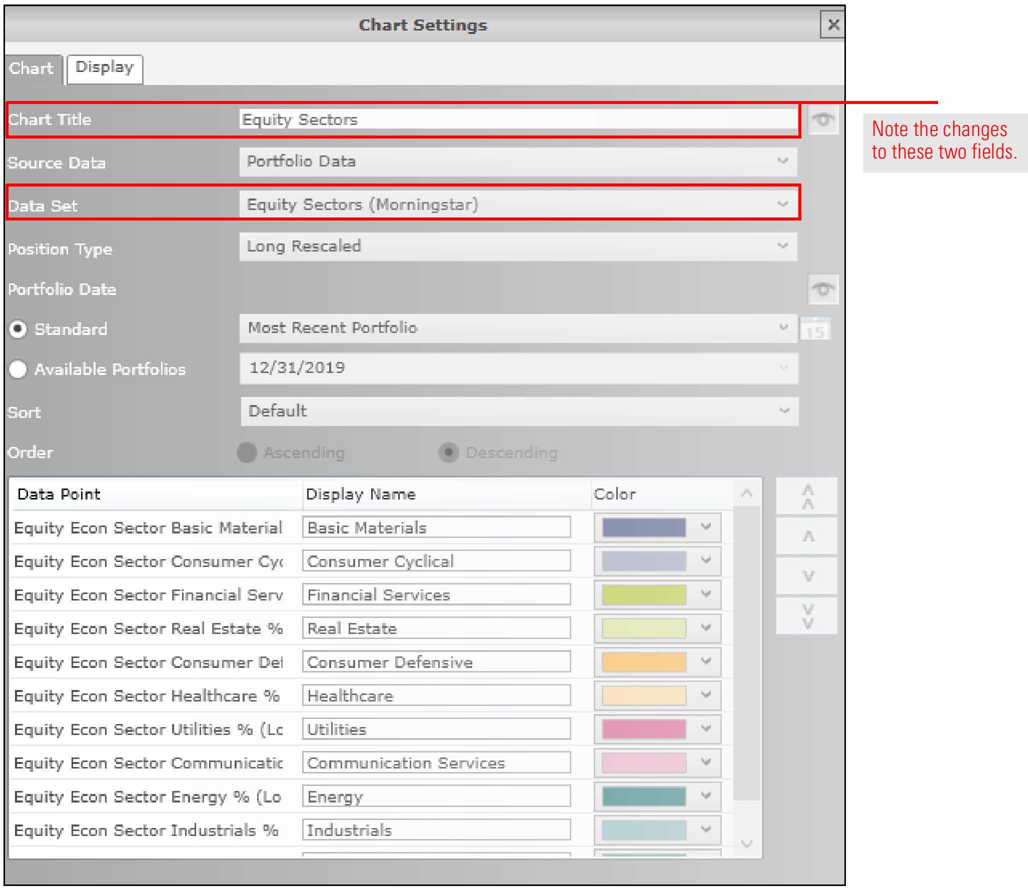
9. Change the **Chart Title** field to read simply **Asset Allocation**.



Note the change to this field.

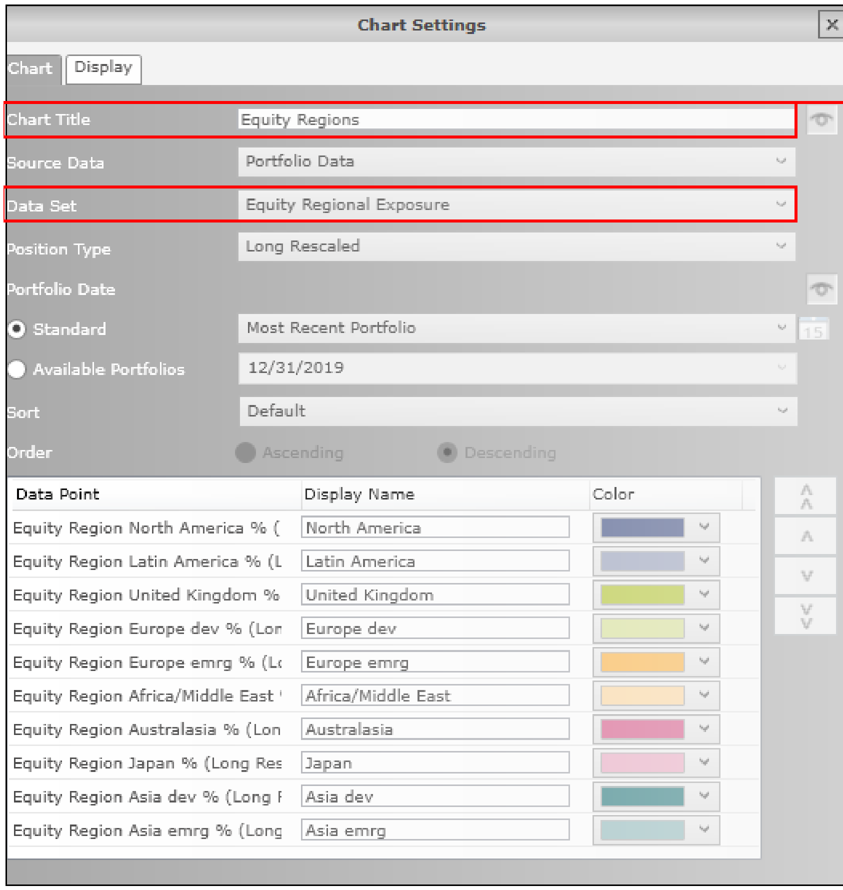
10. Click away from the Chart Settings menu to close it.

11. Select the **middle pie chart**.
12. Click **Chart Settings**.
13. Change the **Chart Title** field to read simply **Equity Sectors**.
14. From the **Data Set** drop-down field, select **Equity Sectors (Morningstar)**.



15. Click away from the Chart Settings menu to close it.

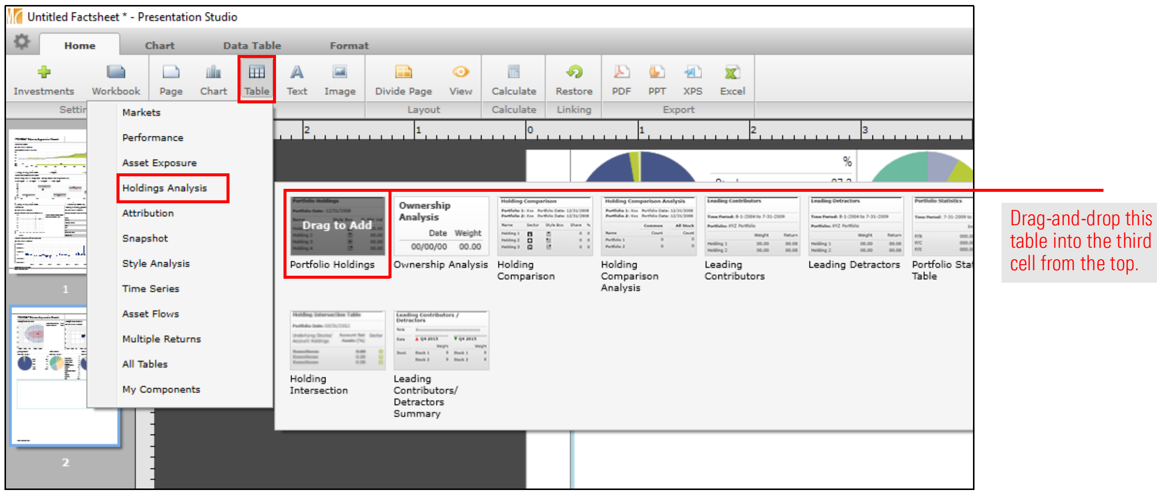
16. Select the **pie chart to the right**.
17. Click **Chart Settings**.
18. Change the **Chart Title** field to read simply **Equity Regions**.
19. From the Data Set drop-down field, select **Equity Regional Exposure**.



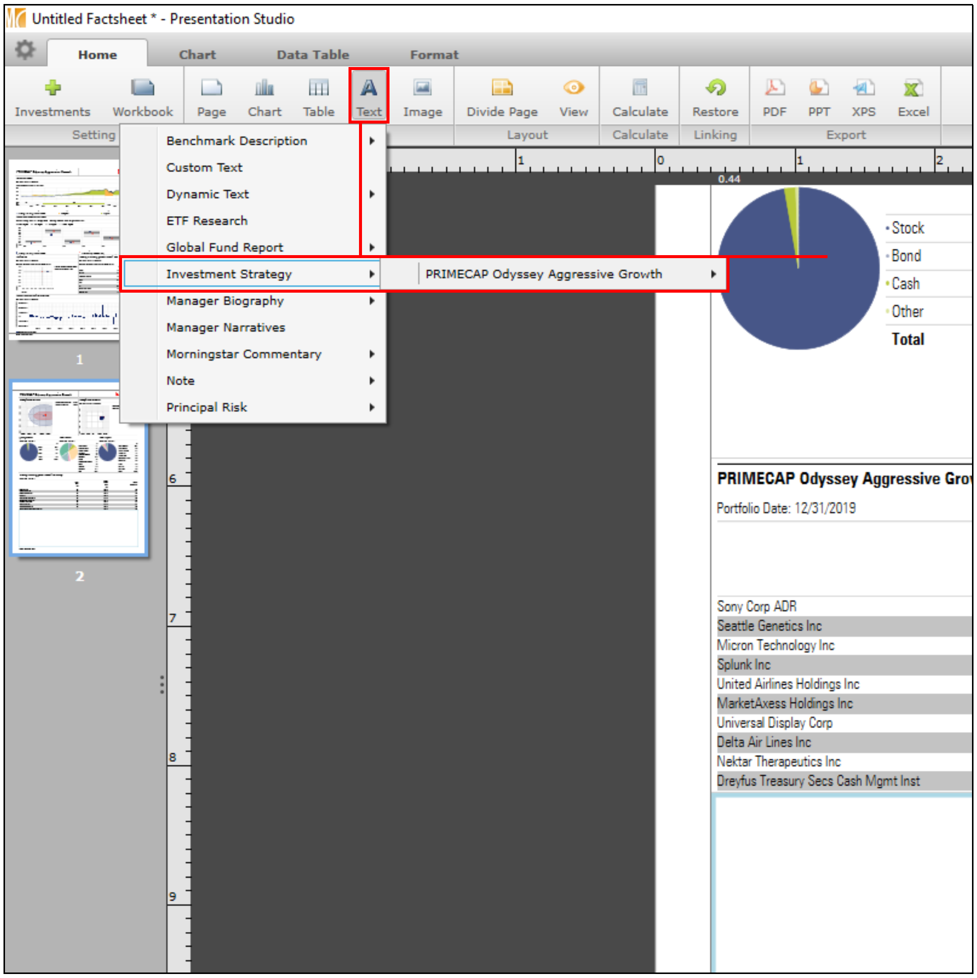
Note the changes to these two fields.

20. Click away from the Chart Settings menu to close it.

21. To see the top 10 holdings in the fund's portfolio, start by selecting **the third cell from the top**.
22. Click **Table** > **Holdings Analysis**, then **drag-and-drop** the **Portfolio Holdings** table.

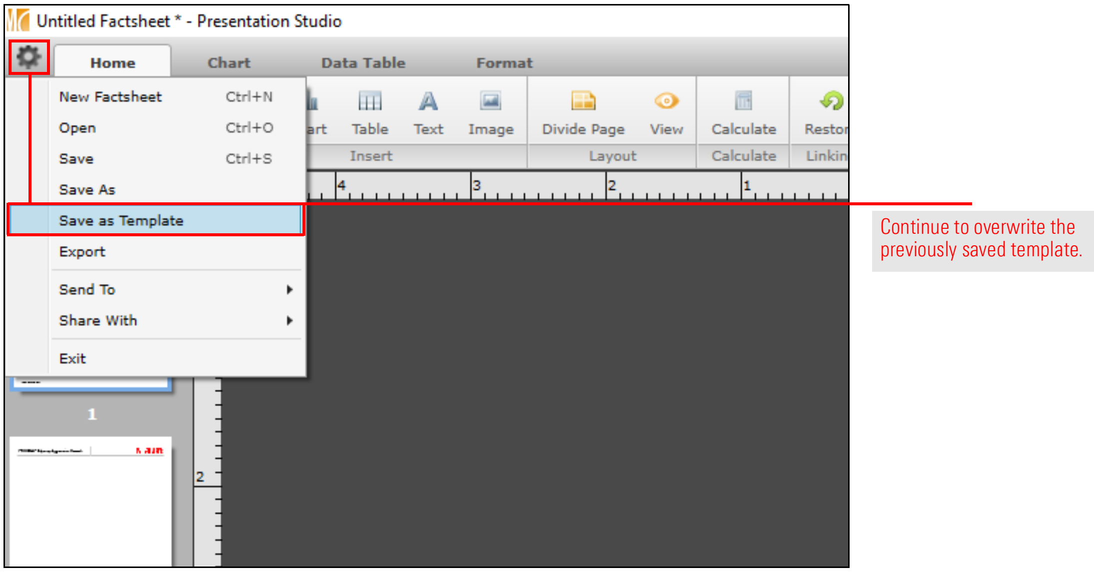


23. Finally, to add the Investment Strategy of the fund, **select the cell at the bottom of the page**.
24. From the toolbar, click **Text** > **Investment Strategy** > **PRIMECAP Odyssey Aggressive Growth** > **English**. The text appears in the cell.



Be sure the bottom cell on the page is selected before choosing this option.

25. Save the template by clicking the **icon** in the upper-left corner of the screen and select **Save as Template**.



26. Select the **My Fund Analysis** template saved previously, then click **Save**.
27. When the overwrite message opens, click **Yes**, then click **OK**. This template can now be used for any equity fund or ETF.