Introduction to Presentation Studio

Onboarding Guide



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Introduction to Presentation Studio

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.

Overview

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)

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.

Exercise 1: Launch a new Factsheet template



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

Presentation Studio			- 🗆 X	
M	NINGSTAR Presentati	ion Studio	0 0	
Workbook + Factsheet	 ○ ← Plan Review + ^ 	Asset Allocation +	Portfolio +	This guide shows users how to create this type of template
Morningstar Templates My Templates My Rep	New Page			
Name	Туре	Layout	Version	
Asset Allocation				
► Factsheets				
Workbooks				

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



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

		Investments: Settings		×	
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				OK Cancel	

- 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**.

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Jump to record n	ame: POAGX				
PRIMECAP Odys	sey Aggressive Grow	th (USD,XNAS,POA	GX,Port+Per	f,Oldest,Re	Be sure to select the fund to be used in the template before clicking OK.
<				>	
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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**.

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

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.

Exercise 2: Set up the pages for the template

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

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



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



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

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	1	2		1	•		Two Cell			Four (3	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**.

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Principal F	lisk		•		Calculation Benchmark 2			the report is run.
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- 5. From the toolbar, set the **font size** to **20** and apply the **bold** setting.
- 6. From the toolbar, select **Align** > **Middle**.

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		Middle Bottom										Be sure to select the second instance of Middle from the list.

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

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

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

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		Right Justified Top Middle Bottom			PRIN	MECAP Odys	sey Aggressive	e Growth	M∩	RNINGS	STAR®		Use this command to shift the logo to the right side of the cell.
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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.

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

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	1															Shap 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.

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

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Delete from Workbook Background Color / Image Border Type Border Style Border Color	PRIMECAP Odyssey Aggressive Growth	MIC XHNINGƏLƏK	

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:

Exercise 3: Design the layout of the first page

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



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

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

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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**.

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



 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.



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.

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	1 Name Sain	2 -									

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

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:

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



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

				PRIMECAP Investment Growth Time Period: 3/1/2015 to Define drawdown as decl 2000	Odyssey		Aggressive	Growth	1	
~	Top Left Right Bottom Off	~	Cut Copy Paste Delete Show Tir Show Cu Legend Font Colo Chart Ar Plot Area Grid Line	me Period Irrency or ea Color e Color color	Ctrl+X Ctrl+C Ctrl+V Del	16	a a/2018	2/2017 = Contraction	99.5%	
	Auto-Fit		Border T Border S Border C View Set Save to I X Axis Se Y Axis Se	ype ityle iolor tings Link Status My Components ettings ettings	k k					Use this command to improve the appearance of the legend for the chart.

- 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.

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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.



- 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.



- 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**.

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

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:

Exercise 5: Design the layout of the second page

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

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		PRIMECAP	Odysse	y Aggressive G	irowth					Be sure the correct page is selected and the main cell as well.
2 2										

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.

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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.

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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.

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

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

- 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.

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- 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**.

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Chart Display							
Chart Title	Asset /	Allocation			ð		
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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).

		Chart Settings				×	
Chart Display							
Chart Title	Equity	Sectors		_	_	¢	Note the changes
Source Data	Portfo	lio Data				~	to these two fields.
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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.

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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.



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

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- 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.