


Advisor Workstation Training Manual: Using the Home Page

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Advisor Workstation Training Manual: Using the Home Page

This document explains how to use Advisor Workstation's Home Page, which can be found by clicking on the Home tab at the top of Advisor Workstation.

Overview

 Note: Your Home Page could differ from what you see here, as each institution decides which features to display on the Home tab; this manual will cover all possible features.

You will learn about the following:

- What each widget does on the Home Page
- How to rearrange the widgets on the Home Page, and
- How to hide items on the Home Page.

Using the Quick Start Widget

This section explains how to make best use of the Quick Start widget on the Home Page. The Quick Start widget allows you to immediately move to a different area of Advisor Workstation, without having to first select a module tab or an option from the left-hand navigation pane.

The table below describes the functions you can access from the Quick Start widget:

Option	Description
Portfolio Report Builder	This option brings up the Portfolio Report Builder dialog box. You can select either a client's portfolio(s) or a model portfolio and include up to 10 different reports for the portfolio and its holdings
Group	This option brings up the Group File dialog box. From here, you can quickly combine clients or prospects into a group.
Client	This option brings up the Client File dialog box. You can immediately create a new client record from here.
Portfolio	This option brings up the Morningstar Quick Portfolio dialog box. You can either create a new portfolio, or open an existing one.
Custom Benchmark	This option brings up the Morningstar Custom Benchmark dialog box. Here, you can create a new benchmark, or create a blended benchmark
Security Report	This option brings up the Security Report Builder dialog box. You can select a variety of investments (or a list you've previously saved) and create a tailored report bundle for your client or prospect
Advanced Search	This option opens the Advanced Search dialog box. You can either create a new search, or open an existing one. Note that the universe defaults to Canadian Mutual Funds.
List	This option opens the List dialog box. You can create a new list of investments, clients or hypothetical illustrations.
Graph	This option opens the Graph dialog box. You need to click the Find/Add Securities button on the right side of the dialog box to include items for a graph.
Hypothetical	This option brings up the Morningstar Hypothetical Illustration dialog box. You can either create a new hypothetical illustration, or open an existing one.

Overview

What is available from the Quick Start widget?

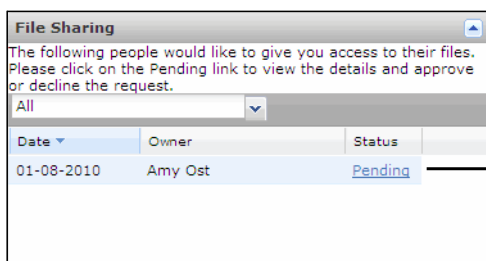
Using the File Sharing Widget

This section explains how the File Sharing widget works. This widget allows you to review and accept or decline requests from others who would like to share files with you.

- 👉 Note: You cannot share files with others by using this Home Page widget. For that, you must go to the **File** menu and select **File Sharing**.

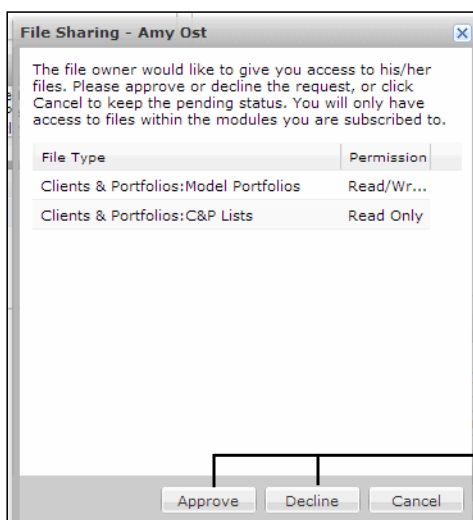
To review, accept or decline a file-sharing request from the Home Page, do the following:

1. Use the **drop-down field** to search for requests from the past week, month or all time.
2. When you see an item listed in the File Sharing widget, click **Pending**. The File Sharing dialog box appears.



Click once on the **Pending** link to review the request

3. To accept the request, click **Approve**. To reject the request, click **Decline**. The dialog box will close, and the status on the Home Page will update to reflect your choice.



Select one of these options

Overview

How to use the File Sharing widget

Using the Recently Modified Files Widget

This section explains how the Recently Modified Files widget works.

Overview

The Recently Modified Files widget shows the top 25 recently modified files from different parts of the Workstation. You can jump immediately to the area (client record, advanced search, etc.) of Advisor Workstation by using the hyperlinks in this widget

 Note: Shortcuts available here will vary, depending on your institution's solution.

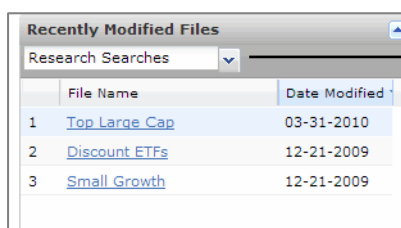
The file types you see in the Recently Modified Files widget depend on your specific configuration and/pr permission. You may see the following file types from this widget:

- Groups
- Clients
- Portfolios
- Client Plans
- Model Portfolios
- Custom Benchmarks
- C&P Lists
- C&P Searches
- C&P Custom Views
- Research Lists
- Research Searches
- Research Custom Views
- Hypotheticals
- Hypo Lists
- Hypo Searches, and
- Hypo Custom Views.

To use the Recently Modified Files widget, do the following:

1. Click the drop-down field and select a **file type**.
2. Click on the **hyperlink** for the record you want to open. The corresponding dialog box or area will open automatically.

How to use the Recently Modified Files widget



	File Name	Date Modified
1	Top Large Cap	03-31-2010
2	Discount ETFs	12-21-2009
3	Small Growth	12-21-2009

Select an option from the drop-down list, then click on the hyperlink for an item

Using the Security Finder Widget

This section explains how to use the Security Finder widget. This tool allows you to generate a report for one security at a time. This saves time from having to go to the Research universe (or a client's portfolio), find the security and generate the report from there.

Remember that you can search for only one security at a time.

To use the Security Finder widget, do the following:

1. From the Select Universe drop-down field, choose the **type** of investment you are looking for.
2. Type the **name** or **ticker** in the find field. To find a security based on a portion of the name, type at least four characters, otherwise the system will use a "begins with" search.
3. Select the **name** of the item you want. If the item does not appear in the initial list that appears, click **View full results**.

Security Finder

Select Universe
Canada Mutual Funds

Please enter security name or ticker

Select Report
Investment Detail Report

Launch Report

Type the name of the item you want to find here

4. Select the desired report type from the Select Report drop down, and click **Launch Report**.

Overview

How to use the Security Finder widget

Using the Market Index

This section explains what the Market Index is, and how to best leverage it with clients. The Market Index tool shows you how the various global markets are performing during a given day..

As seen on the Home Page of Advisor Workstation, the Market Index reflects the performance of the Canadian, U.S., Asian, and European markets are performing, with a 15 minute lag time.

Overview

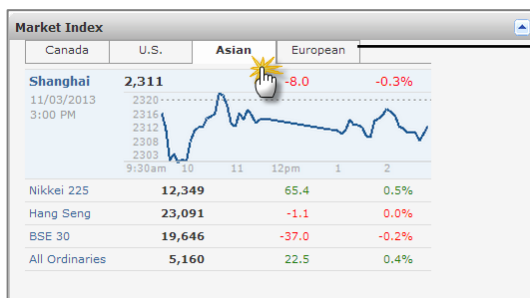
What is the Market Index?



Data is available with a 15 minute lag time

The Market Index widget has two pieces of interactivity: if you move your cursor over one of the Index's, the index's summary chart with pop appears. If you click on the market tabs at the top, you will see each markets available indexes.

How do I use the Market Index widget




Click on a tab to view a Market's indexes

Using the Top Securities Widget

This section explains how to use the Top Securities widget. This widget will display one of two pieces of information:

- The top 25 investments for which you generated an Investment Detail Report in the previous month, or
- The top 25 securities owned in your practice, based on asset size.

 Note: each of these pages is updated on a separate schedule during month-end processing. The Investment Detail Reports will be updated on the fourth business day of the month. The Portfolio data is updated on the 12th business day of the month.

To use the Top Securities widget, do the following:

1. If you want to see portfolio data, select **Portfolios** from the drop-down field.
2. Scroll to the right to see additional data points. Remember that you can sort the columns here as you would in any other Advisor Workstation spreadsheet.

Top Securities				
Investment Detail Reports				
Name	Tot Ret YTD	Tot Ret 3 Month	Tot Ret 3 Year	To 5 Y
AK John Hancock Freedom ...	-1.36	0.73	-4.40	
Aberdeen As Pac ex-Jap Eq ...	6.29	3.40	-	
Fidelity	6.28	3.83	-3.21	
1. SICAV Gbl Adv Strategic...	7.79	6.26	2.40	
AARP Aggressive	5.70	3.66	-0.81	
AARP Conservative	2.88	1.78	4.02	
Aberdeen Asia Bond Instl Si...	5.82	4.30	-	
3 to 1 Diversified Equity	5.86	2.33	-	
Acaia A2000-Alger Large C...	4.63	4.63	-1.71	
1-800-Attorney, Inc.	-	-	-32.49	
1st Colonial Bancorp, Inc.	-0.68	-0.68	-18.51	
3M Company				

Use this drop-down field to switch to seeing the top securities in your portfolios

Overview


How do I use the Top Securities widget?

Modifying the Home Page

This section explains how to modify the widgets on the Home Page. You can do the following with the Home Page widgets:

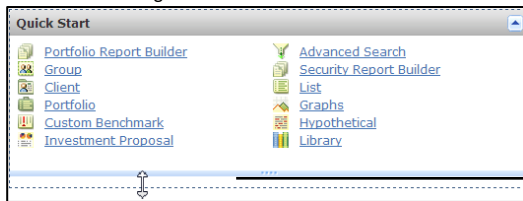
- Change their height
- Reposition them, or
- Collapse them.

You can change the height of a widget (i.e., how “tall” it appears), but not its width.

 The widgets will become slightly wider if you collapse the left-hand navigation pane.

To change the height of a widget, do the following:

1. Move your mouse cursor over the bottom border of a widget. The bottom border and cursor will change.



Note how both the bottom border and mouse cursor have changed

2. Left-click and drag the border down (or up) to change the height of the widget.
3. Release the left mouse button when finished. The new height will be saved until you change it.

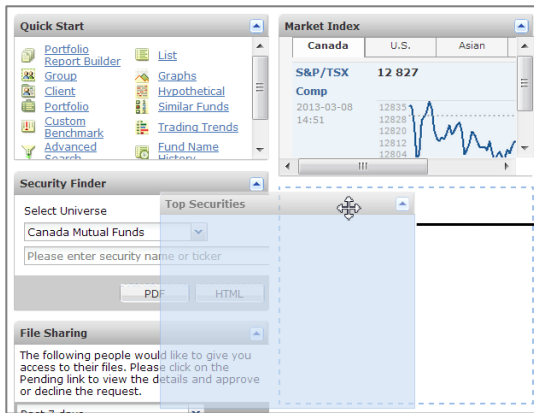
Overview

How do I change the height of a widget

You can change where each widget appears on the Home Page. Note that this updated setting will be saved. To reposition the widgets on the Home Page, do the following:

How do I reposition the widgets on the Home Page?

1. Move your mouse cursor over the title bar for a widget. The cursor will change to a four-headed arrow.
2. Left-click and drag the widget. You will see an outline of the widget as you begin to move it to the new location.

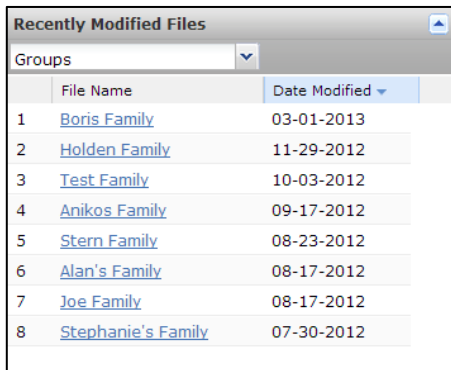


Note the silhouette of the widget as it is dragged to a new location

3. When you have the widget in the position you want, release the left mouse button.

While you cannot completely remove a widget from the Home Page, you can collapse it such that its content is not seen. To collapse a widget, click the arrow icon in the upper-right corner of the widget's title bar. You can expand the widget by clicking the same icon again.

How do I hide a widget?



Click this icon to collapse a widget



Click the same icon to expand a collapsed widget