

Getting Started with Morningstar Direct Cloud

1. From the Home landing page, you'll see the new Morningstar Direct Cloud launch pad. Visit direct.morningstar.com to start using the Next Generation of the platform today!

The screenshot shows the Morningstar Direct Cloud Home page. The navigation menu on the left includes: Home, Alerts, Filings, Price Monitor, Excel API, Help/Definitions, Morningstar Publications, HFR Research, Content Catalog, Learning Center (Product Training, Client Track Webinars, Thought Leadership, Client Events, How-Tos, Certification), Equity/Credit Research, Local Databases, Global Databases, Performance Reporting, Asset Allocation, Portfolio Management, Portfolio Analysis, Markets, Asset Flows, and Presentation Studio.

The main content area includes:

- Announcements:** A table with columns for Date and Headline. Recent announcements include: 3/23 Morningstar Direct Version 3.17 is now available!, 3/19 Retirement of Morningstar Direct Version 3.14 on June 15, 3/19 Retirement of Morningstar Direct Version 3.15 on September 20, 3/17 Listen to a recording of The Intellectual History of Asset Allocation, and 3/17 Retirement of UBS Indices in Morningstar Direct.
- Announcing the Next Generation of Morningstar Direct:** A central banner with a 'Launch' button and a grid of categories: Markets, Ind. Utilitie, Rese. Portfoli, Equi, Funds.
- Product Support:** Contact information for Morningstar Direct Feedback, including email (MorningstarDirectFeedback@morningstar.com) and telephone (+1 866 229 0216).
- Market Barometer:** A table showing performance metrics for various style indexes. The table is organized by size (Large, Mid, Small) and style (Value, Core, Growth).
- Upcoming Training:** A table listing training sessions with columns for Date, Level, Title, Time, and Language.
- Market Commentary:** A table listing recent market commentary reports with columns for Date and Title.

2. Read [Morningstar Direct Cloud Fact Sheet](#)
3. View training videos below or visit direct.morningstar.com/gettingstarted to learn more about this interface and its new capabilities –

- 🔗 [Morningstar Direct Cloud Introduction \(2:18 min\)](#)
- 🔗 [Home Page & Navigation \(3:11 min\)](#)
- 🔗 [Creating a List \(2:25 min\)](#)
- 🔗 [Creating a Screen \(5:08 min\)](#)
- 🔗 [Using the Grid \(4:57 min\)](#)
- 🔗 [Editing a Column Set \(7:14 min\)](#)
- 🔗 [Using Cloud Lists & Screens Throughout Direct \(5:51 min\)](#)
- 🔗 [Advanced Screening \(10:28 min\)](#)
- 🔗 [Research Application Introduction \(3:43 min\)](#)

4. Register for [Live Online Sessions](#)
5. Test your knowledge of Morningstar Direct Cloud – [Take Certification Exam](#)