

Morningstar OfficeSM Cloud Release Notes January 15, 2019

This document describes the new features and enhancements in Morningstar OfficeSM Cloud, as follows:

- ▶ [What's new on the Home Page? \(page 1\)](#)
- ▶ [How can I view the securities of a list set up for alerts? \(page 2\)](#)

Overview

On the Home Page, you can now create a list, screen, or client using the Create icons at the top of the Lists & Screens and Clients widgets.

What's new on the Home Page?

The screenshot shows the Morningstar Office Cloud interface. At the top is the logo and a search bar. Below is a 'Practice Performance Activity' widget with a line chart and summary statistics. At the bottom are 'Clients' and 'Lists & Screens' widgets. Red boxes highlight 'Create' icons in the 'Clients' and 'Lists & Screens' widgets. Red lines connect these icons to callout boxes on the right side of the page.

Practice Performance Activity

When you click this **Create** icon, the Creating Accounts window opens.

Time Period	Cumulative Contribution	Market Value
3M		
1Y		
3Y		
5Y		
10Y		

Cumulative Contribution: \$1,449,037,727.32
Market Value: \$1,222,250,993.58

Clients

Name	Market Value

Lists & Screens

Name
Test 12345
testList

Click this icon to create a client from the Home page.

Click this icon to create a list or screen from the Home Page.

When considering changing a list's alert settings, it can be helpful to know the list's contents before proceeding. On the Notification Settings page, you can now display the holdings in an alert-enabled list.

How can I view the securities of a list set up for alerts?

Name	Identifier	Security Type	Number of Alerts
Agilent Technologies Inc	A	Equity	4
Apple Inc	AAPL	Equity	2
Income ETFs	List	List	1

5 Securities in Income ETFs	
Financial Select Sector SPDR® ETF	XLF
Real Estate Select Sector SPDR®	XLRE
Schwab US Dividend Equity ETF™	SCHD
Vanguard Dividend Appreciation ETF	VIG
Vanguard FTSE Developed Markets ETF	VEA

For more information, please read [Setting Alerts for Investments](#).