

# Morningstar Direct **New User Checklist**

Welcome to Morningstar Direct! Whether you're interested in in-depth research, analytics, or publishing tools, the Morningstar Direct platform will provide solutions to meet your individual needs. Follow the steps below to help you get started.

## Getting Started

### Step 1

[Watch "Getting Started" Videos](#) to learn basic navigation and functionality, what you have access to, and how to build a list of investments to apply to all other areas of Morningstar Direct.

### Step 2

[Register for "New User Orientation" Webinar](#) to learn more about the basic navigation and functionality from a Morningstar Direct Team Member.

### Step 3

[Read the Basic Level User Guide Chapters](#) to run through navigational exercises.

### Step 4

[Take the Basic Level Certification Exam](#) to test your knowledge. Intermediate and Advanced level exams are also available from the Learning Center folder in Morningstar Direct.

### Step 5

[Join our Morningstar Direct LinkedIn Community](#)

## Morningstar Direct Resources

### One-on-One Training

For one-on-one trainings to help with your workflow integration, contact your dedicated Client Solutions Consultant.

### Morningstar Direct Client Events & Networking Opportunities

Register for [Hands-On Workshops](#) & [User Forums](#) in your geographic area.

### Morningstar Direct Training Resources

Visit our [Learning Opportunities website](#).

### General Questions

For general questions pertaining to data, methodology, quick "how to" questions, click on *Send us feedback* at the top right of the tool or [call your local support team](#).

Value	Core	Growth
0.45	0.38	0.13
0.00	-0.12	0.07
-0.43	-0.44	-0.49

Style Indexes	Value	% Change
Large Value	1,758	+0.45
Large Core	2,621	+0.36
Large Growth	1,903	+0.13
Mid Value	3,454	0.00
Mid Core	4,338	-0.12
Mid Growth	3,381	+0.07
Small Value	3,858	-0.43
Small Core	4,980	-0.44
Small Growth	2,734	-0.49