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.