

Managing Client Email Addresses and Passwords for the Client Web Portal

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Managing Client Email Addresses and Passwords for the Client Web Portal

This document details the actions an advisor (or assistant) and the advisor's client can take with regard to managing the email address and password used to access the Client Web Portal (CWP).

The following topics are addressed:

- ▶ Morningstar's role in managing access to the CWP
- ▶ what an advisor or assistant can do to manage a client's access to the CWP
- ▶ what your clients can do to manage access to the CWP
- ▶ how to disable access to the CWP for a client
- ▶ what to do when a client is locked out of the CWP
- ▶ what to do if a client no longer has access to the email address used to log into the CWP
- ▶ what to do when a client has forgotten the CWP password
- ▶ what to do when a client wishes to change the email address and/or password used to log into the CWP.

Due to email and password security concerns, Morningstar employees are not able to change email or password information for the CWP.

Through Morningstar Office, an advisor or assistant can do the following:

- ▶ enable the CWP for a client
- ▶ establish a password to access the CWP (at the time you initially enable the CWP), and
- ▶ disable access to the CWP for a client.

After your firm grants access to the CWP for a client, your firm cannot change any information related to logging into the client's CWP.

Overview

What is Morningstar's role in managing access to the CWP?

What can an advisor do to manage access to the CWP?

Clients can do the following in the CWP:

- ▶ retrieve the password
- ▶ change the password, and
- ▶ change the email address.

Note: These actions can be taken only if the client has access to the email address used to establish the CWP. If the client does not have access to the email address used to grant access to the CWP, your firm must contact Morningstar Office Product Support to rectify this.

What can a client do to manage access to the CWP?

If your firm disables a client's CWP, no action can be taken by your firm, your client, or Morningstar with regard to managing access to the CWP. In order to troubleshoot a CWP issue, it must first be enabled for a client.

How do I disable a client's CWP?

Note: You cannot change the email address for a client once it is submitted. If you mistakenly submit the wrong email address, you should immediately click the **Disable** button to disable access, remove any reports from the CWP for that client, and contact Morningstar Office's Customer Support to reset the login for that client.

To disable a client's access to the Client Web Portal, do the following:

1. In the left navigation pane, click the **Client Management** tab, then be sure you are on the **Clients** page.
2. Double-click on the **client** for whom you want to disable CWP access. The Client window opens and you will be on the Accounts page.
3. In the Client window, select the **Client Web Portal Setup** page.
4. Select the **Disabled** option button.

Select this option

5. Click **Apply Changes**. A confirmation message appears, asking if you are sure want to disable the client's access.
6. Click **OK**. Be sure to contact Customer Support to have the login reset for the customer.

After five consecutive failed login attempts, a client is locked out of the CWP. The client will see a warning message that the account is locked, and the "Forgot Password" link on the CWP login page is deactivated. Neither your firm, nor your client, can unlock a locked account. Instead, the client must inform your firm, and your firm must contact Morningstar Office Product Support to unlock the CWP.

What do I do if a client is locked out of the CWP?

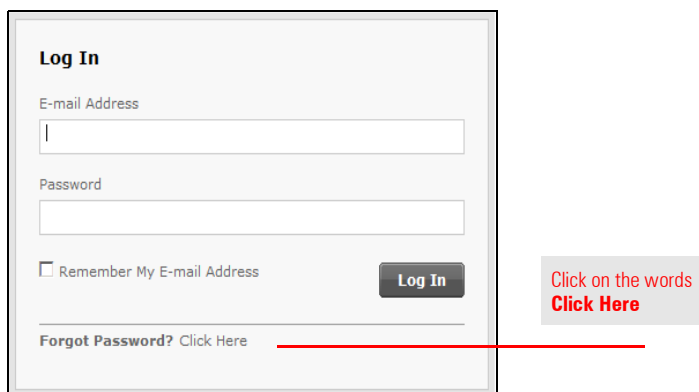
If a client does not have access to the email address used to log into the CWP, the client should inform your firm of this, and your firm must contact Morningstar Office Product Support. Product Support will create a new access link, send the link to you, and then you can send the link to your client.

What do I do if a client does not have access to the email address used to establish the CWP?

If a client has access to the email address used to establish the CWP, the password can be retrieved in the CWP login screen. The client should do the following:

What do I do if a client forgets the CWP password?

1. Click <https://cwp.morningstar.com/> to access the CWP.
2. On the Log In screen, to the right of the question "Forgot Password?", click on the words **Click Here**.



3. In the **E-mail Address** field, type the **email address** used to register for the CWP, then click **Submit**. An email is sent to the registered email address. The email sender is Morningstar, and the Subject is Your New Morningstar Password.

Log In

E-mail Address

Password

Remember My E-mail Address **Log In**

Forgot Password?

Enter the e-mail address you use to log in and we will send you an e-mail on how to set your new password.

E-mail Address

Submit

Input the email address used to establish the CWP

Note: If a valid email address is entered, the following message appears:

An e-mail has been sent to you with instructions on how to create a new password.

If an invalid email address is entered, the following message appears:

We could not locate that e-mail address in our files. Please make sure the e-mail address is correct.

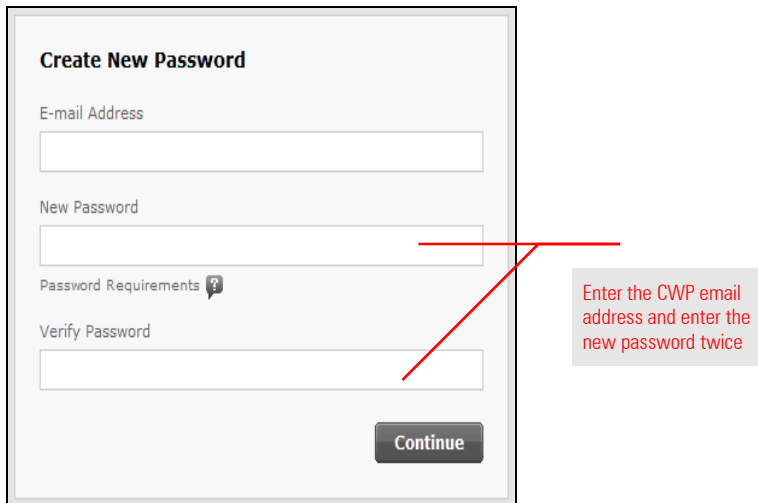
4. Click the **link** in the email. The client's default web browser opens to the Create New Password screen.

5. On the Create New Password screen, populate the following fields:

- ▶ **E-mail Address**
- ▶ **New Password**, and
- ▶ **Verify Password**.

Note: The password must meet the following criteria:

- ▶ 8 to 16 characters long
- ▶ Must contain a number
- ▶ Must contain a lowercase and an uppercase letter
- ▶ Cannot contain sequential character strings, like "abcd"
- ▶ Cannot contain part of the client's login email address, and
- ▶ Cannot contain the word "Morningstar."



The screenshot shows a web form titled "Create New Password". It contains four input fields: "E-mail Address", "New Password", "Password Requirements" (with a help icon), and "Verify Password". A "Continue" button is located at the bottom right of the form. A red callout box with a pointer indicates that the user should enter the CWP email address and the new password twice.

6. Click **Continue**. The following message appears:

Your password has been successfully changed.

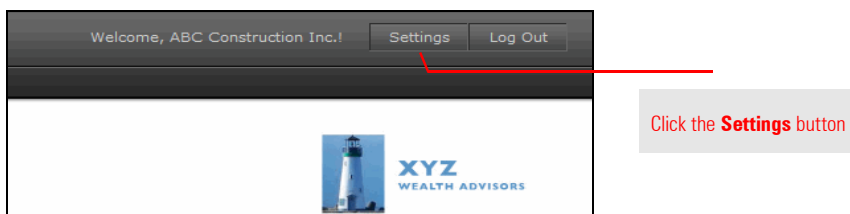
7. To sign in with the new password, go to <https://cwp.morningstar.com/>.

Your firm cannot change a client's password or the email address used to login to the CWP, but a client can change these elements in the CWP.

How can a client change the email address or password used to access the CWP?

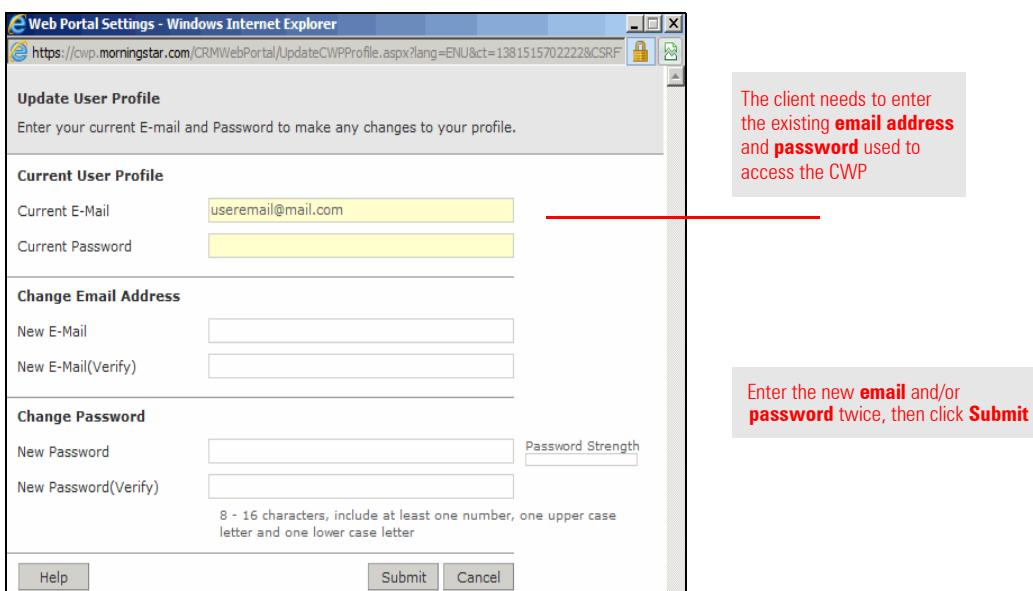
The client must do the following:

1. Login to the CWP (<https://cwp.morningstar.com/>).
2. Click the **Settings** button in the upper-right corner of the window. The Update User Profile dialog box appears.



3. Enter the following data:
 - ▶ Current E-mail
 - ▶ Current Password
 - ▶ To change the email address used to login to the CWP, fill out the **New E-mail** and **New E-mail (Verify)** fields
 - ▶ To change your password, fill out the **New Password** and **New Password (Verify)** fields.

- Note: The password must meet the following criteria:
- ▶ 8 to 16 characters long
 - ▶ Must contain a number
 - ▶ Must contain a lowercase and an uppercase letter
 - ▶ Cannot contain sequential character strings, like "abcd"
 - ▶ Cannot contain part of the client's login email address, and
 - ▶ Cannot contain the word "Morningstar."



4. Click **Submit**. A confirmation message appears. Click **OK** to clear it.