

Downloading and Installing Principia

This manual covers the following topics:

- System requirements
- Downloading Principia from the E-Delivery area, and
- Principia single-user installation instructions.

The single-user installation system requirements for Principia are:

- Windows XP, Windows Vista, or Windows 7
- Minimum RAM: 128 MB
- 1 GB-8 GB free hard disk space (varies by module)

Have questions? Please feel free to email Morningstar Technical Support at tech@morningstar.com, or call (312) 424-4299.

Overview

What are the system requirements for installing Principia?

How do I contact Morningstar?


Accessing the E-Delivery website

This section will explain how to download the Principia software from the E-Delivery website.

Overview

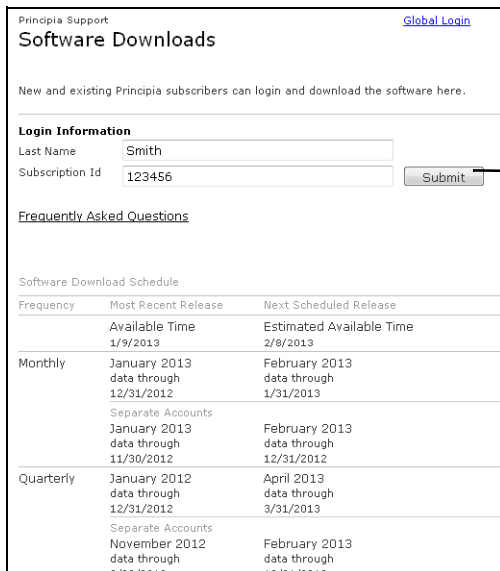
To download Principia from the E-Delivery website, do the following:

1. Go to the Principia E-Delivery home page: <https://prnedelivery.morningstar.com>.
2. In the available fields, enter your **Last Name** and **Subscription Id**.

 You should have already received a Welcome to Morningstar Principia e-mail which contains the Last Name and Subscription ID associated with your account.

3. Click **Submit** to open the Current Software Downloads page.

Login and download steps



Principia Support [Global Login](#)

Software Downloads

New and existing Principia subscribers can login and download the software here.

Login Information

Last Name

Subscription Id

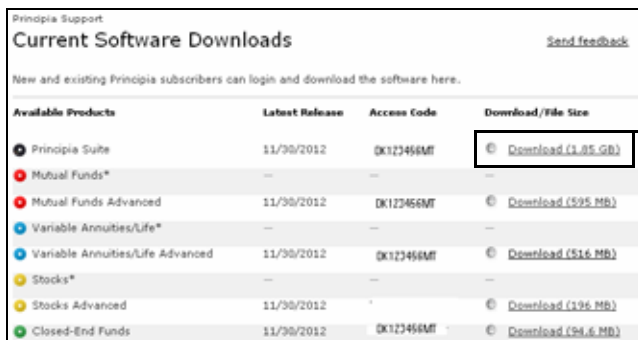
[Frequently Asked Questions](#)

Software Download Schedule

| Frequency | Most Recent Release | Next Scheduled Release |
|-----------|---|---------------------------------------|
| | Available Time 1/9/2013 | Estimated Available Time 2/8/2013 |
| Monthly | January 2013 data through 12/31/2012 | February 2013 data through 1/31/2013 |
| | Separate Accounts January 2013 data through 11/30/2012 | February 2013 data through 12/31/2012 |
| Quarterly | January 2012 data through 12/31/2012 | April 2013 data through 3/31/2013 |
| | Separate Accounts November 2012 data through 1/30/2013 | February 2013 data through 12/31/2013 |









After entering your login information, click this button.

4. From the Download/File Size column, click the **hyperlink** for the module you wish to download.



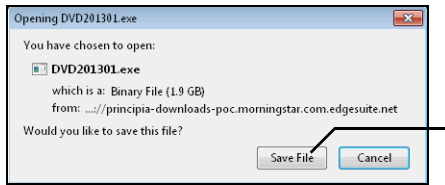
Principia Support [Send feedback](#)

New and existing Principia subscribers can login and download the software here.

| Available Products | Latest Release | Access Code | Download/File Size |
|--|----------------|-------------|------------------------------------|
|  Principia Suite | 11/30/2012 | DK123456MT | Download (1.85 GB) |
|  Mutual Funds* | — | — | — |
|  Mutual Funds Advanced | 11/30/2012 | DK123456MT | Download (595 MB) |
|  Variable Annuities/Life* | — | — | — |
|  Variable Annuities/Life Advanced | 11/30/2012 | DK123456MT | Download (516 MB) |
|  Stocks* | — | — | — |
|  Stocks Advanced | 11/30/2012 | — | Download (196 MB) |
|  Closed-End Funds | 11/30/2012 | DK123456MT | Download (94.6 MB) |

The hyperlink indicates the file size of the module you will download.

- From the window that opens, click **Save File**.



- If Internet Explorer is your browser a warning message will open with the option to Run, Save, or Cancel. Click the **Save** button to download and store the executable file on your system, otherwise, click **Cancel** if you wish to abort the software download.

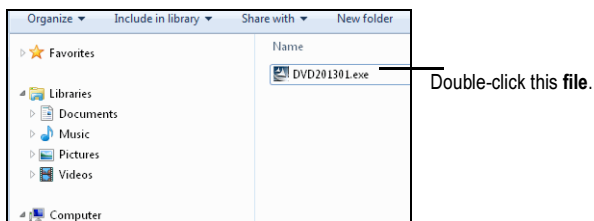
Installing the Single-User Version of Principia

This section explains how to install Principia after you have run the download from the E-Delivery website. Be sure to have your Principia Access Code available before beginning.

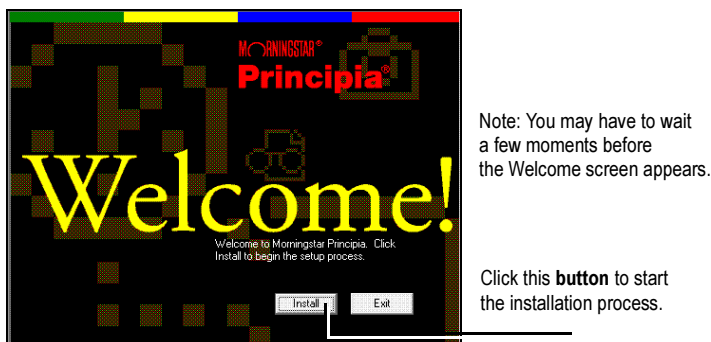
- ☞ Your Principia Access Code is available from the Current Software Downloads page of the Principia E-Delivery website.

To install Principia, do the following:

1. Navigate to the location where you stored the file from **Step 5** in the Accessing the E-Delivery website section of this manual.
2. Double-click the executable **file** to open the Principia Welcome window.



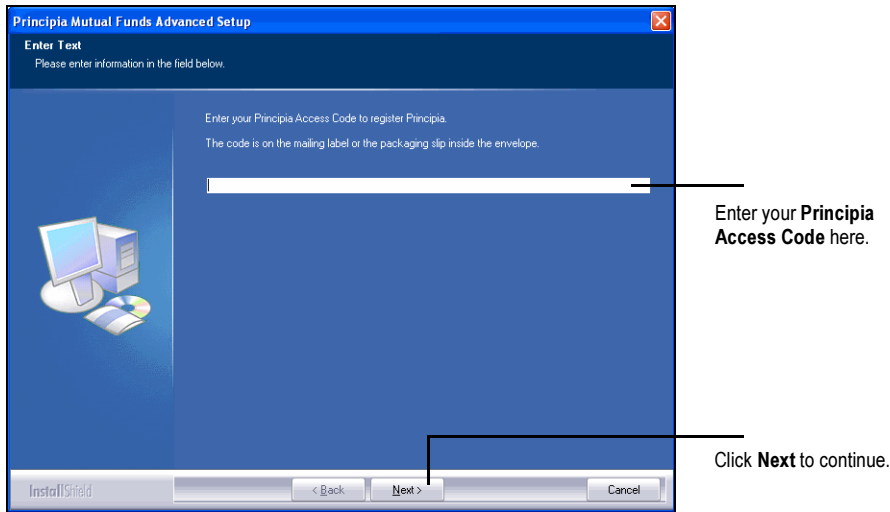
3. From the Principia Welcome screen, click the **Install** button to begin.



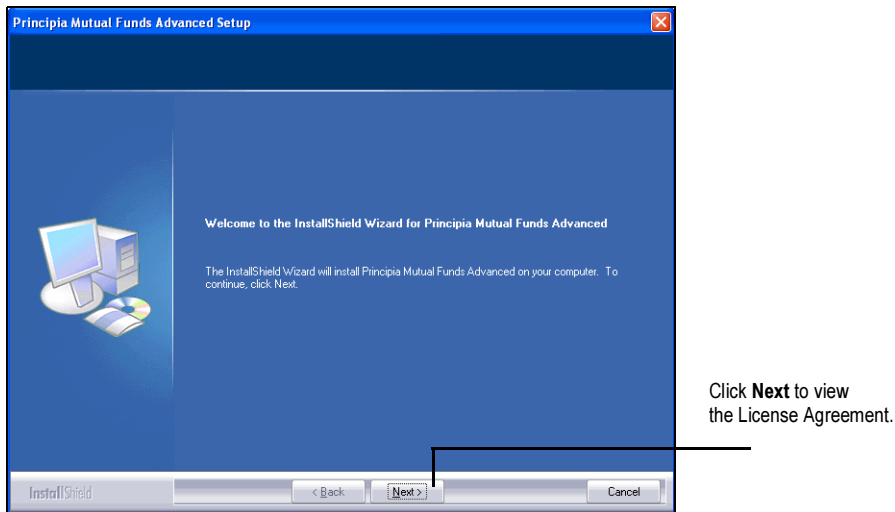
Overview

How do I install Principia?

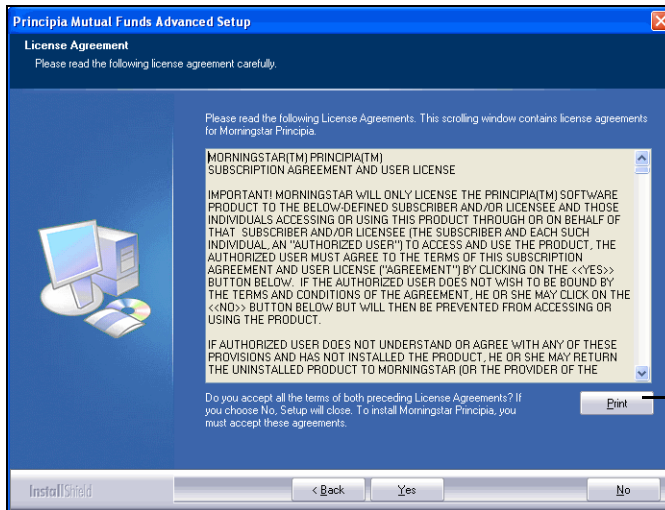
4. On the step shown below, enter your **Principia Access Code**, then click **Next**.



5. The Welcome to the Install Shield Wizard dialog appears. Click **Next**.

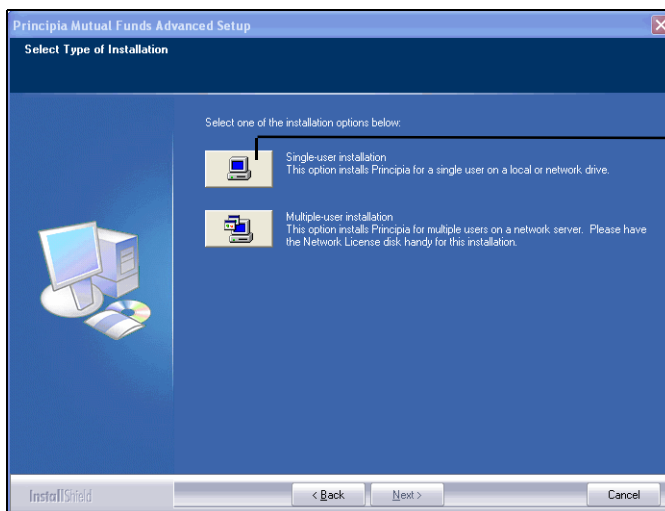


- The License Agreement step appears. Read the agreement, and click **Yes** if you accept the terms.



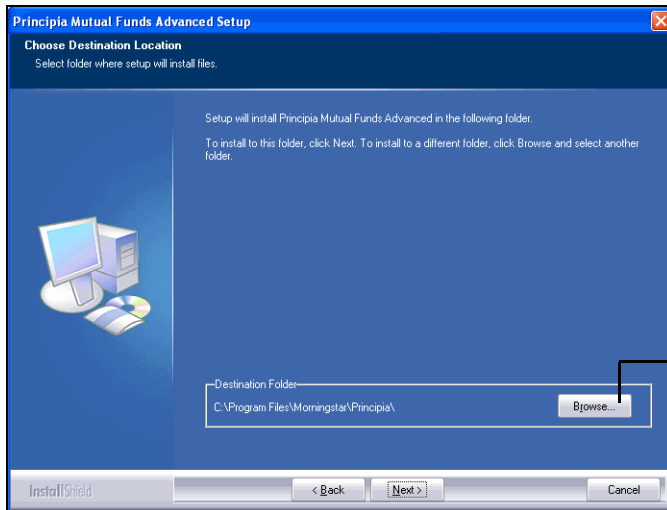
Click this button to print the License Agreement.

- To begin, select **Single-user installation**, then click **Next**.



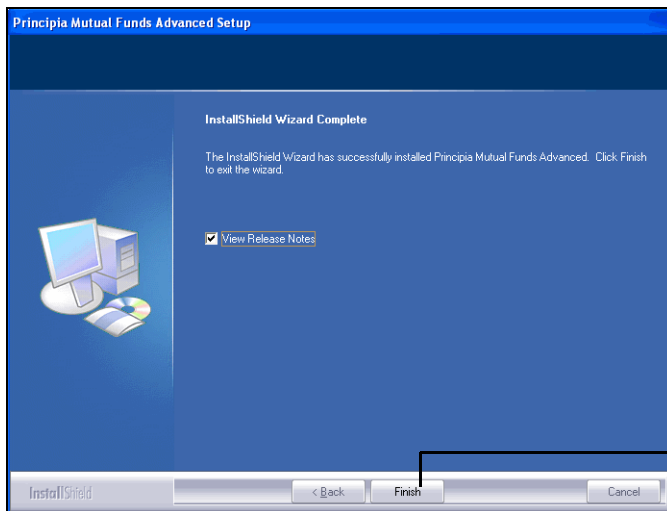
Click this button to continue the installation.

8. The Choose Destination Location window appears. Click **Next**.



Note: If you wish to install Principia to a custom location, click the **Browse** button and navigate to the destination of our choice.

9. When all files have been successfully installed, the Installation Complete dialog box appears. Click **Finish** and read the Release Notes, which contain useful information about changes to the software.



Click **Finish** to complete the installation.