


Morningstar Direct Login Changes – Frequently Asked Questions

This manual answers the following questions related to the changes to the login page and procedure for Morningstar DirectSM:

- ▶ [What is changing about the way clients login to Morningstar Direct and why? \(page 1\)](#)
- ▶ [If I have not installed the latest version of Morningstar Direct, will I still need to use MFA? \(page 1\)](#)
- ▶ [Can my firm opt out of using multi-factor authentication? \(page 1\)](#)
- ▶ [How does the multi-factor authentication process work? \(page 2\)](#)
- ▶ [What if I cannot receive SMS text messages from Morningstar? \(page 4\)](#)
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To make the application more secure and prevent brute-force login hacks, the desktop access point of Morningstar Direct will use multi-factor authentication (MFA) when clients login, beginning May 29, 2021. MFA requires clients to enter not just an email address and password when logging into the application, but a secondary code as well. The secondary code can either be sent to a mobile device, or a third-party application installed on a mobile device.

This change applies to all clients, regardless of which version of the application is installed. A new login page will be seen as soon as the desktop access point is launched.

 Note: Logging into the web access point or the stand-alone version of Presentation Studio are scheduled to require multi-factor authentication by July 2021.

Firms cannot have the MFA setting changed for its users.

Overview

What is changing about the way clients login to Morningstar Direct and why?

If I have not installed the latest version of Morningstar Direct, will I still need to use MFA?

Can my firm opt out of using multi-factor authentication?

When a client logs in to Morningstar Direct, they will be prompted to enter a code sent to their mobile phone. Do the following:

How does the multi-factor authentication process work?

Note: If your phone cannot receive SMS text messages from Morningstar, see [What if I cannot receive SMS text messages from Morningstar? on page 4.](#)

1. Enter your **mobile number**, then click **Continue**.

Multi-factor Authentication

For your security, Morningstar requires you to verify your identity. Enter your mobile phone number, and we'll send you a code via SMS.

Mobile Phone Number

+1 201-555-0123

Continue

[I'd rather use an authenticator app.](#)

Clients must enter a phone number before being able to click Continue.

2. A text message with an authentication code is sent to your mobile device. Enter that **code** in the login page, then click **Continue**.
3. When logging in for the first time, a Recovery Code is provided. **Write down this code** and keep it available; this code allows clients to log in to Morningstar Direct should their phone not be available when a code is sent. Once a Recovery Code is used, a new one will be generated.

4. Check the **I have saved this code for future use** box, then click **Continue**.

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Recovery Code

To sign in without your device, save this one-time code.
Write it down and keep it somewhere safe for future use.

Recovery Code

TKW8 - KGKM - 5TE7 - 6Y8V - RU8G - SSJZ

I saved this code for future use

Continue

Clients cannot continue to login until this box is checked.

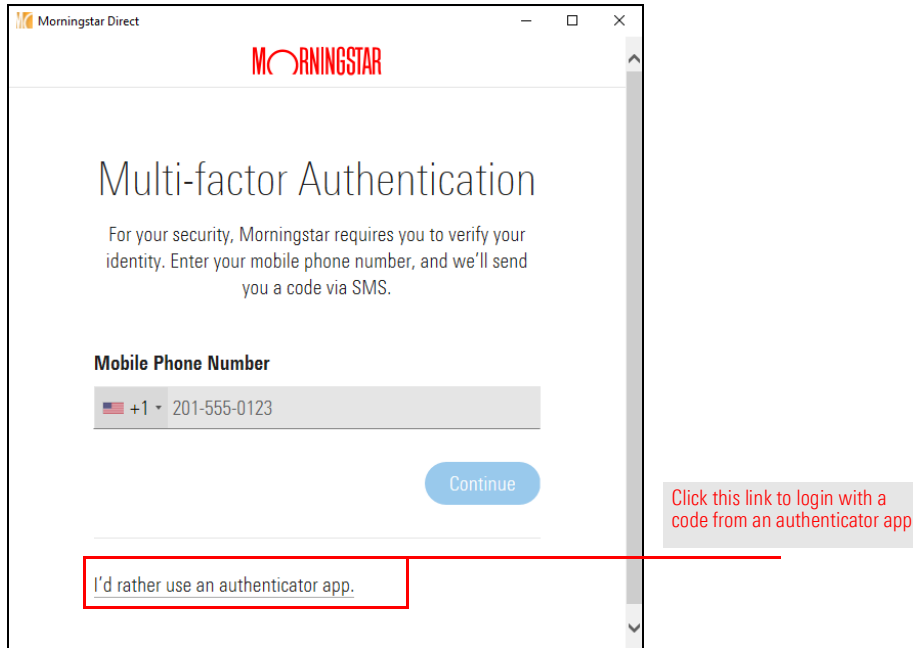
5. When the Enrollment Complete message is seen, click **Continue**.
🔗 Note: This message is seen only the first time a client logs in using MFA.
6. When the Identity Verified message is seen, click **Continue**. Morningstar Direct opens.

Mobile phones in certain countries or regions cannot receive text messages via SMS from Morningstar. Therefore, to log in to Morningstar Direct, these clients should install one of the following apps to receive the authentication code:

- ▶ Microsoft Authenticator
- ▶ Okta Verify, or
- ▶ Google Authenticator.

When logging into Morningstar Direct, do the following:

1. Click **I'd rather use an authenticator app.**



2. On your phone, **open the authenticator app.**
3. Select **Add app** and, if prompted, choose **Other** (not Organization),
4. **Scan the QR code** showing on the login screen.
5. A code is shown in the authenticator app. Enter this **code** in the Morningstar Direct login window.

🔗 Note: When logging in for the first time, a Recovery Code is provided. Be sure to write down this code and keep it available; this code allows clients to log in to Morningstar Direct should their phone not be available to receive a new code. Once a Recovery Code is used to login, a new one will be generated.

This procedure will be repeated each time clients login to Morningstar Direct, unless a client clicks the **Remember this browser** box.

6. When the Enrollment Complete message is seen, click **Continue**.

🔗 Note: This message is seen only the first time a client logs in using MFA.

7. When the Identity Verified message is seen, click **Continue**. Morningstar Direct opens.

What if I cannot receive SMS text messages from Morningstar?

If a client no longer has a mobile device with the phone number used when registering for MFA, the Recovery Code can be used to login. However, the client will not be able to setup another phone number or authenticator app by themselves. If this happens, please contact Morningstar to reset the MFA settings. Only then will the client be able to link to a new phone number or authenticator app.

What happens if I lose my mobile device and cannot receive a new Recovery Code?