Morningstar Add-In

Installation Guide

MORNINGSTAR®

October 2018

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Installation

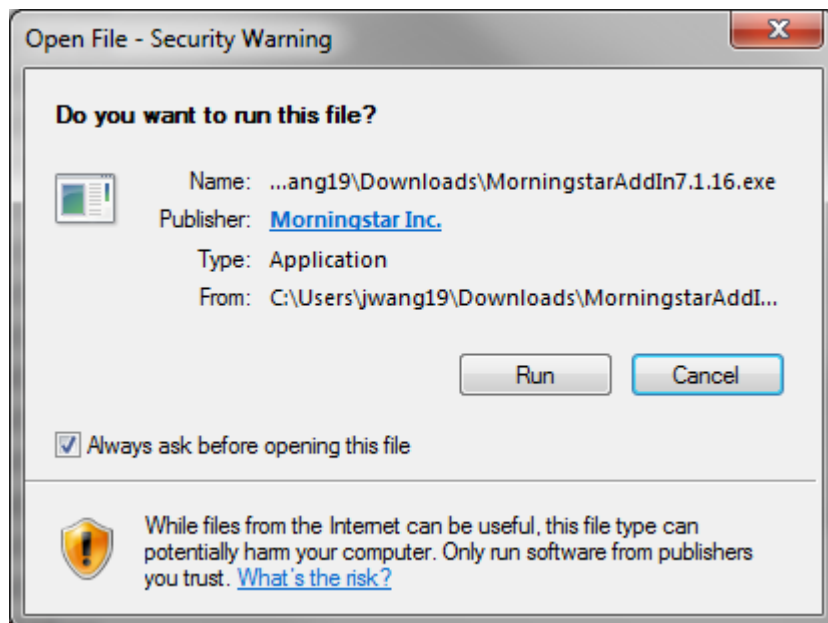The following steps will help setup the Morningstar Add-in:

1. Run the installation program for the Morningstar Add-In.

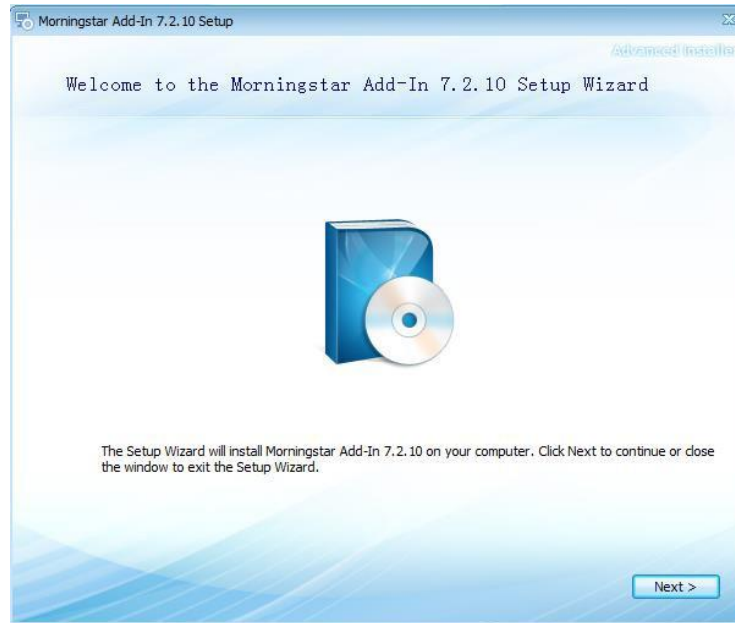   See the "Download" page for the latest installation version.

   🖉 Close all other Windows programs, especially Microsoft Excel, then select **Next** to continue.

2. If you have a windows security system, click the "run" button.
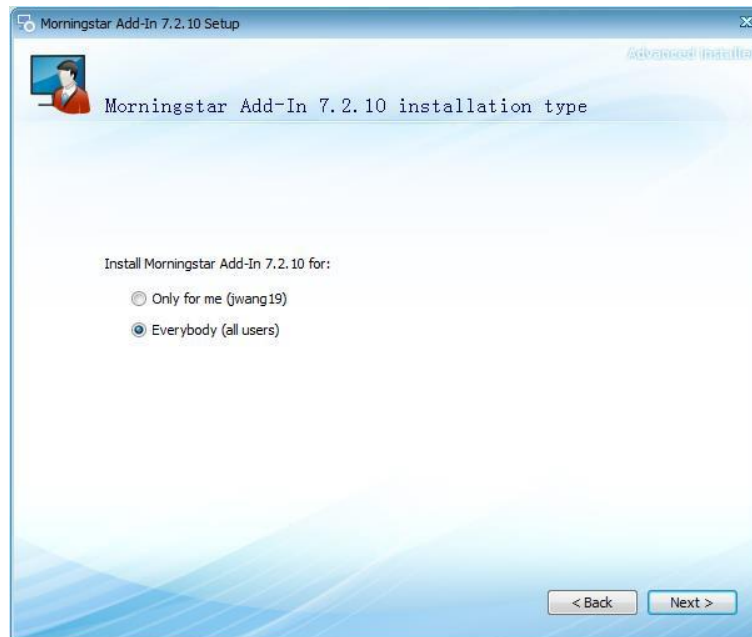

   The installation will now begin.

   Click on the **next** button to start the installation process.

3. The next screen provides a user control on who can access the application on the PC.
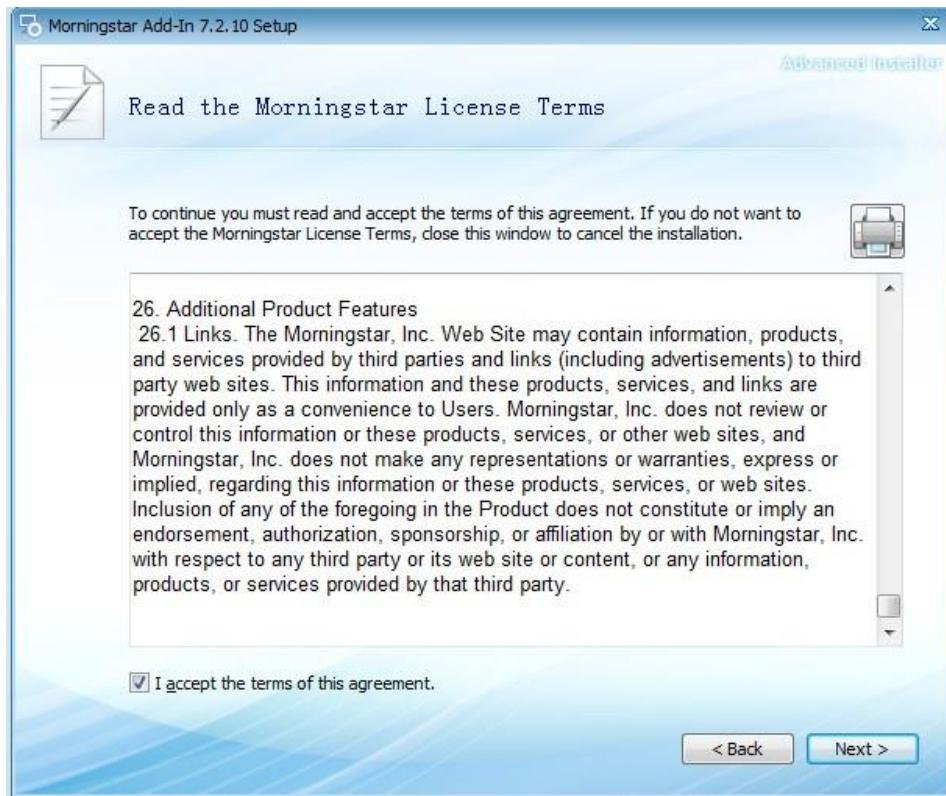
 The application must be installed for "all users" to perform correctly. Administrator rights are also required for this installation.
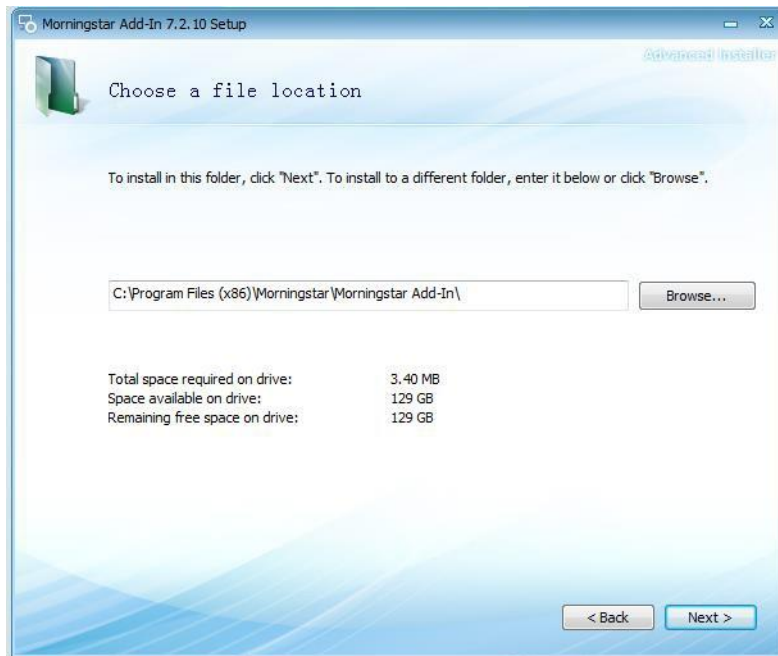
4. The next screen is a license to terms agreement. Please read the terms carefully. When finished, check the box: **I Accept the terms of the agreement**.
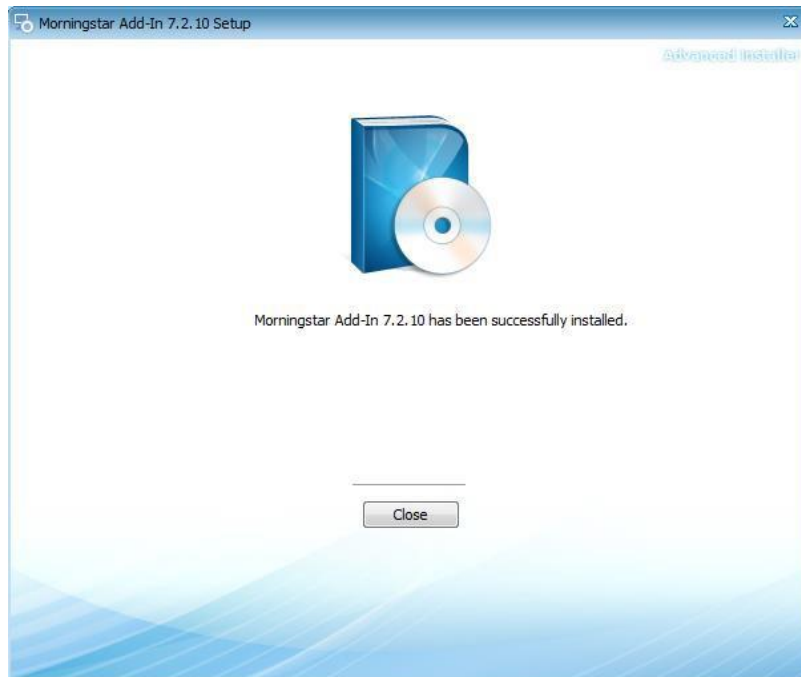
   Select **Next**

5. The next screen provides the default download location. The default location is recommended. If a new location is desired, please select **Browse** and select a new location.
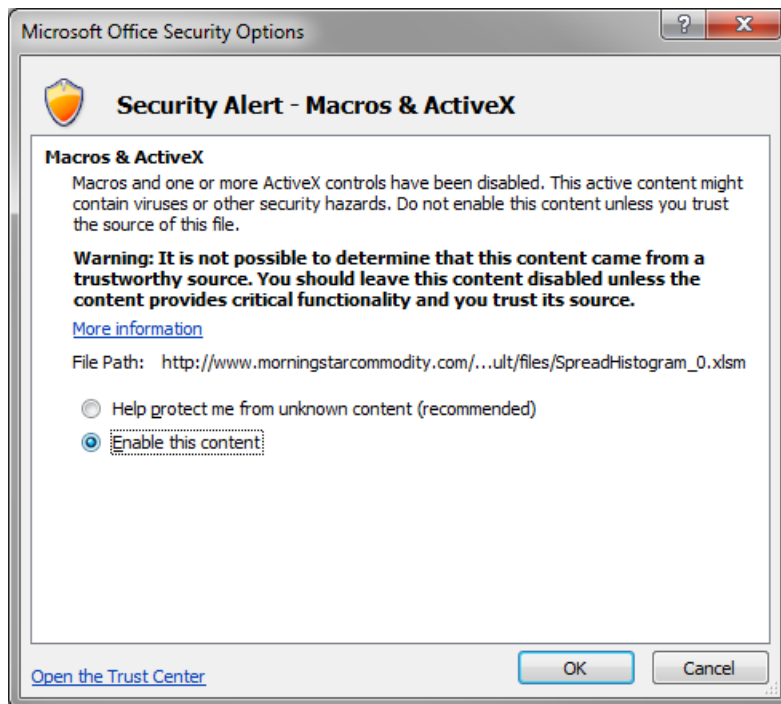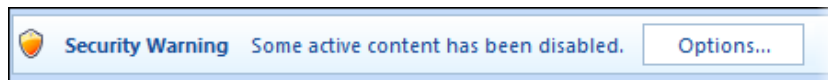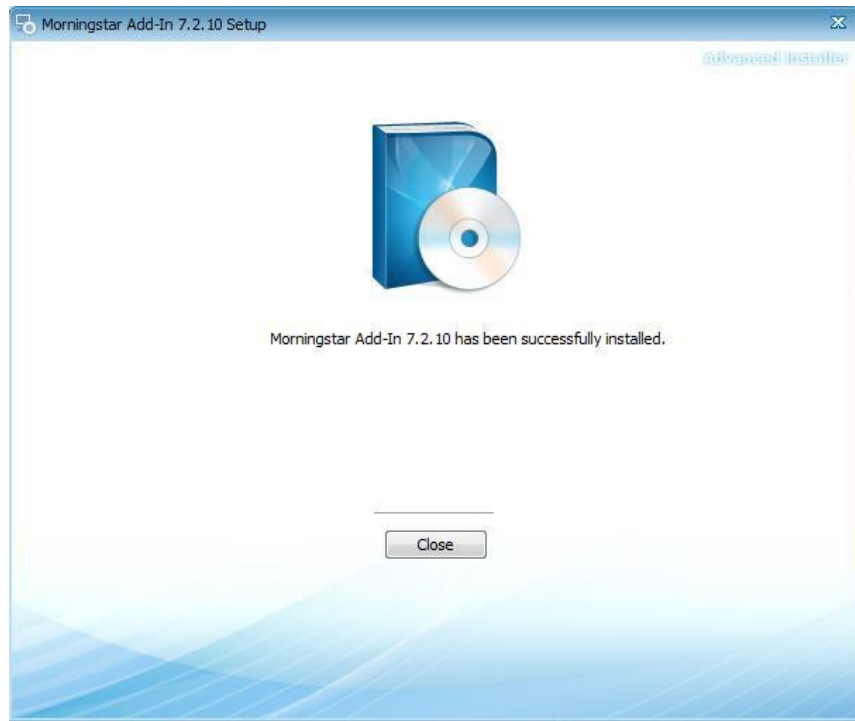
   Select **Next**

6. The bit version of the Excel will be automatically checked to install Add-in in the right setting. Add-in can run on both 64-bit and 32-bit Excels.

7. **Select Install**, to begin installation. Once installed, you will see the screen below.

8. When the program attempts to include the Add-In to Excel, you may be prompted to **Enable Content**. Click **"Options",** and then select **Enable Content**. The content must be enabled for the program to add the Add-In to Excel.
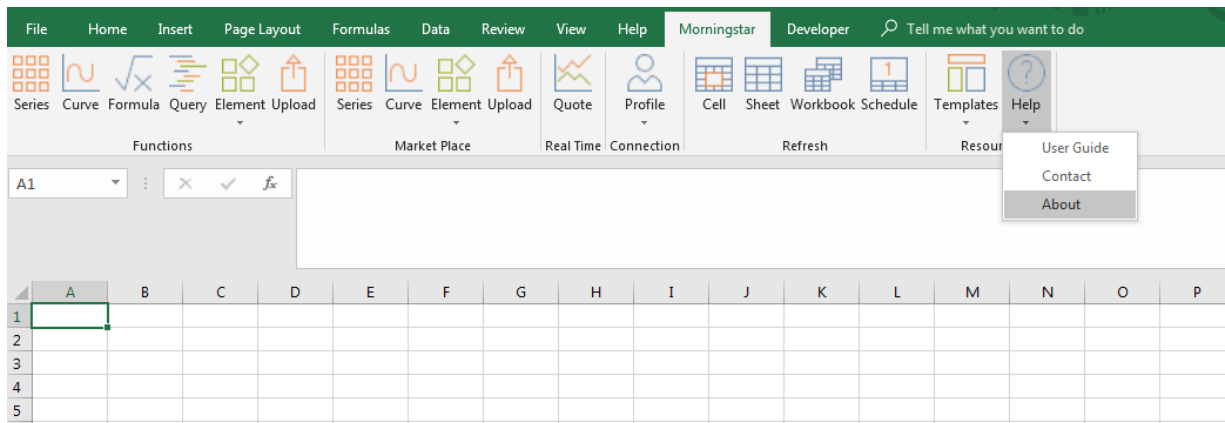

9. Select **Close**. The Commodity Add-In is now installed on your machine.

Setup

Once the application is installed, launch Microsoft Excel. A new tab called "Morningstar" should appear.

Click on **Profile,** to configure host and login information for "Commodities". If you have access to Direct, type in the login information for Direct.
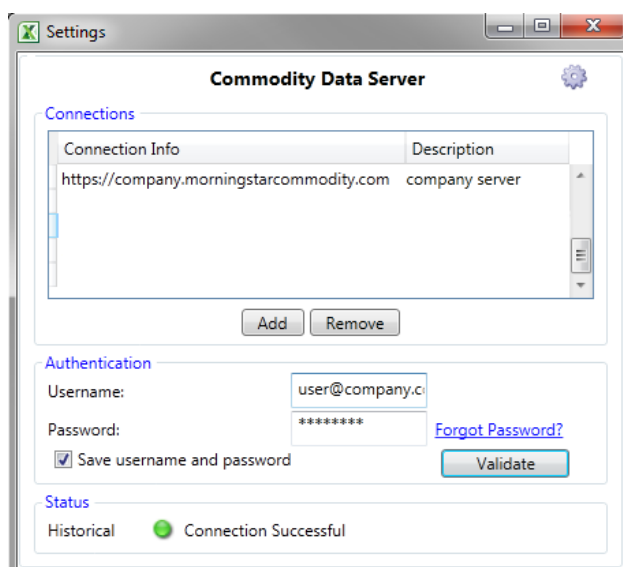
Types of Connections

The Morningstar Add-In has a Data Server login, Marketplace login and a real-time login.
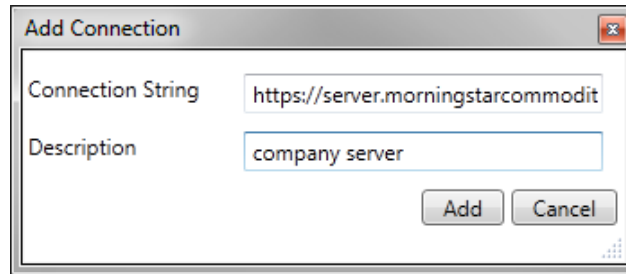
- Commodity Data Server login – Provides historical data and is required for using the Series, Curve, Formula, Element, and Query functions.

- Marketplace login – Provides access to the Morningstar Marketplace

- Real-time login – Provides real-time data and is required in order to use the Quote function. The real-time data is only available with a Commodity Dashboard subscription.

Establish Commodity Data Server Connection
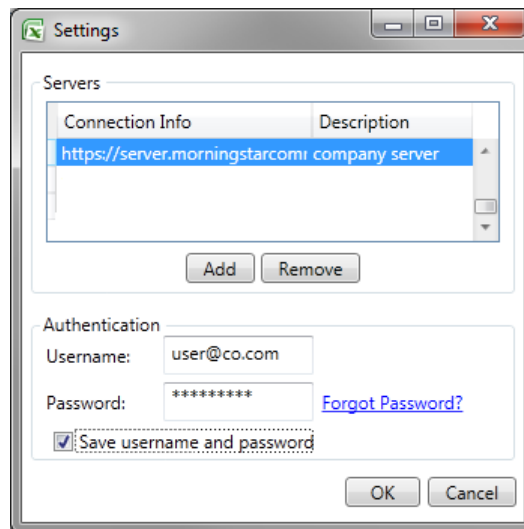
1. Click on **Add** to establish a historical data host connection.

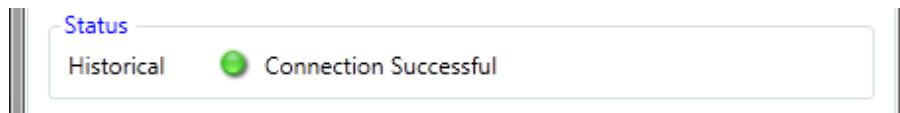2. Add the host connection string URL and description, then click **Add**.

3. Type in the Username and Password in the Authentication window. Then click **OK**.

✏️ Please make sure to check "Save username and password". This option will prevent the application from prompting for a username and password every time the application is launched.

A successful login will not return any error messages.

Establish Marketplace and Real-Time Data Connection

1. Enter a Username and Password in the 'Authorization' fields located under the real-time login in section. Then, click **Validate**.

2. The real-time Username and Password are the same as Morningstar Markets: Commodities edition credentials.

3. A successful login will show a green light and state that the connection was successfully authenticated.

Hardware and Software Requirement

Minimum requirements on computer

1. Microsoft Excel versions: 2007, 2010, 2013, 2016 and 2019
2. Microsoft .NET Framework: 4.7 +
3. Operating System: Windows 7, Windows 8, Windows 10

For any issues, please contact commoditydata-support@morningstar.com