

Morningstar Institutional Data Manager

What is Institutional Data Manager?

Institutional Data Manager (IDM) is a web-based data acquisition interface for Morningstar's surveyed datasets, through which asset managers update their vehicle, strategy, and firm-level data. IDM is linked to Morningstar's internal databases and data automatically flows through to Morningstar products with quality assurance checks along the way. With IDM, firms can review and edit the data submitted, track progress towards reporting deadlines through status dashboards, as well as submit and monitor new requests (e.g., new activations).

Currently, IDM supports data reporting for separate accounts, models, collective investment trusts (CITs), hedge funds, pooled funds (Canada), private funds, strategies, firm-level data, and research surveys.

How do I request access for my firm?

- If your firm already has funds that are included in Morningstar's institutional universes, then your firm may already have an IDM account set up.
- If not, we can set one up. Alternatively, we have a [section on the IDM platform](#) where you can request access.

How do I get access so I can submit data to IDM?

- If you are already registered for any of Morningstar's products, we can add your email address to your firm's account once set up.
- Email idm@morningstar.com details of your firm, the universes you would like to submit data for, and the email address(es) you would like to get added, including any colleagues that will also need access. They will also need to register or already have access to a Morningstar product.
- If you do not already have access to a product, then you will first need to [register your email address](#) before we can set you up, then you can email us the request.

Create Your Account

First Name *

Last Name *

Email Address *

Password * ⓘ

Re-Enter Password *

How do I login to IDM?

- Once your account is set up you can simply visit <https://idm.morningstar.com/> login and start submitting your data.
- Once you have logged in successfully there is a [Help Center](#) and an [F.A.Q Section](#) that can assist you with the basics of submitting data via the platform.

Sign In to Institutional Data Manager

Not already a member? [Click here to register.](#)

Email

Password

[Forgot password?](#)

[Sign In](#)

Need help? [Email our support team](#) or [request access for your firm.](#)

How do I add vehicle to IDM?

- We encourage you to sign in on our IDM platform and add your products. <https://idm.morningstar.com/>
- Click on 'Add Vehicle' at Vehicle Lineup Page and select an investment type;

Vehicle Lineup

0 Selected | Batch Update | Export

+ Add Vehicle

Queue	Firm	Strategy	Vehicle
			<input type="checkbox"/> Vehicle

Sec ID | Type | Domicile | Status | Investment Provider Firm | Strategy

- Collective Investment Trust
- Hedge Fund
- Model Portfolio
- Pooled Fund
- Separate Account

- Click 'Create a New Strategy', provide required strategy information, then click 'Link New Vehicle'; if you are trying to add the vehicle with existing strategy, please search the strategy and start to continue with adding the vehicle.

Select a Strategy

Before you get started, select the strategy your vehicle belongs to. If the strategy isn't already in our database, [create a new strategy.](#)

This vehicle is subdivided

Search Strategy Name or ID

Strategy Name	ID	Firm
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Queue Firm Strategy Vehicle

Overview Narratives Assets & Accounts **Linked Vehicles**

✓ ✓ ✓ ●

Linked Vehicles

Linking vehicles allows investors and consultants to view all available investment options across universes for any given strategy. Morningstar defines strategy as the overall manner in which a pool of money is managed by a single person or by a single management team. Please provide at least one linked vehicle for this strategy.

* Required fields

Select a vehicle such as a MF, ETF, or SA that already exists within our database to link to this strategy.

Add a new SA, CIT, MP, or HF that is not in our database to link to this strategy.

Name	Morningstar Fund Identifier	Type
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- You will be navigated to the vehicle adding page, at this page you are able to clone the existing vehicle information, or you can add a new vehicle.

Queue Firm Strategy **Vehicle**

Overview Management Fees & Purchase Info Performance Portfolio Additional Documents

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Overview

You can prepopulate fields for this new vehicle request by selecting another vehicle in Morningstar's database. Select an existing vehicle from your firm and update any fields for the new vehicle accordingly.

- After this you will get two pages to submit the strategy and vehicle both. Please submit both and we will then approve it on our end.
- Once added, the Products will be available on IDM immediately, and on Morningstar Direct in 48 hrs.