Welcome to ThomsonONE.com Investment Banking. This user guide will show you everything you need to know to access and utilize the wealth of information available from ThomsonONE.com Investment Banking.

This program is an Internet-based database that may be accessed by using one of the network computers in the McLeod Business Library in Alan B. Miller Hall.

Mason School of Business graduate students, undergraduate students with a business major, faculty and staff may also access this program through the Mason School of Business network.

Introduction

ThomsonONE.com Investment Banking provides market news, quotes, and reference data to monitor changing market conditions and to gain important insight into a company, industry or event. Company overviews provide financial data on more than 55,000 active public companies globally. There is also data on more than one million private companies world wide.

The database also provides streaming Reuters news and quotes. The news includes market stories and comprehensive analysis on companies, industries, market trends and more.
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Opening Screen

The ThomsonONE.com Investment Banking opening screen is divided into three areas. The first is the Header with a search function.

The second area is the Mode column, which is on the left side of the screen. This column indicates the mode in which the database is operating. The modes are Market Views (see page 15), Company Views (which is the opening display) (see page 7), Screening & Analysis (see page 22), and Tools & Tips (see page 36).

The third area is the display area, which changes according to the mode in which the database is operating.

Header

In the first line of the Header, there are buttons for navigating the program (Forward and Back buttons and a Home button). These buttons allow you to page forward and back between the pages you have opened during your current session. The Home button will return you to the initial opening screen.

There is also a What’s New button, which will open the What’s New page in the Tools & Tips mode. See page 36 for information about the What’s New page.
On the right side of the header there is a **Help** button, which has a menu with three selections: **Help Contents**, **User Info** and **Customer Support**.

The **Help Contents** selection will open a help screen in a new window. You may use this window to browse or search for help information on the use of the database.

The **User Info** selection will open a window with technical information about the database connection.

The **Customer Support** selection will open a window with contact information for Thomson.

The **Log Out** button will log you out of the program without first asking if that is what you really want to do.

**Search Function**

The second line of the Header has a search function and some other buttons. The **Market** box is grayed out and the **All Countries** selection cannot be changed.

**Performing a Search**

The search function consists of two boxes and a **Lookup Symbol** button. The first box has a drop-down menu with selections that allow you to choose a search mode. The selections are: **Symbol Name**, **All Companies**, **Company Tree**, **CUSIP**, **SEDOL**, **ISIN** and **PERMID**. The **Symbol Name** selection is the default selection when the program first opens. These selections are used to determine how the database searches for a company.

The second box is used to enter your search term.

For example, for **Symbol Name** you would enter a ticker symbol into the second box.

For **All Companies** and **Company Tree** you would enter the name of a company.

For **CUSIP**, **SEDOL**, **ISIN** and **PERMID** you would enter the appropriate number or code into the second box.

After entering a term click on the **Go** button to begin the search. The results will be opened in the **Company Overview** page of the **Company Views** mode. See page 7 for information about the **Company Overview** page.
If you do not know the ticker symbol of the entity you are looking for click on the **Lookup Symbol** button. This will open a search function in a new window. This window has three tabs: **Advanced Search**, **Recently Used** and **Popular Symbols**.

The **Popular Symbols** tab displays a list of symbols that have been used repeatedly over time. Clicking on an item will have the information for the entity automatically entered into the main search box and a search initiated. The results of that search will be displayed in the *Company Overview* page of the **Company Views** mode.

The **Recently Used** tab will display a list of symbols that have been used recently. Clicking on an item will have the information for the entity automatically entered into the main search box and a search initiated. The results of that search will be displayed in the *Company Overview* page of the **Company Views** mode.

The **Advanced Search** tab is used to find a symbol for the entity you are researching. To make a search select the universe to use and any qualifiers you may want in the first two lines.

Next, select the mode from the drop-down menu and enter your search term into the second box. Click on the **Search** button to begin the search.

The results are displayed in the lower part of the window. Click on the item you want and the information for the entity is automatically entered into the main search box and a search initiated. The results of that search will be displayed in the *Company Overview* page of the **Company Views** mode.
ThomsonONE.com Investment Banking Modes

To access the information in the ThomsonONE.com Investment Banking database use the following modes: **Company Views** (below), **Market Views** (page 15), **Screening & Analysis** (page 22), and **Tools & Tips** (page 36).

**Company Views Mode**

The **Company Views** mode is the default mode that is displayed when the program first opens. The mode column, on the left side of the screen, displays the selections available in the **Company Views** mode.

![Company Overview](image)

When the **Company Views** mode opens a company’s data is usually displayed. To change the company to one you are researching perform a search using the search function in the program header. See page 4 for information on performing a search.
Company Views Selections

The selections associated with the Company Views mode are:

**Overviews, News & Corporate Events, Corporate Governance, Price Chart, Fundamentals, Estimates, Debt Overview, Deals, Share Ownership, Research, Filings and Officers & Directors.**

**Overviews**

The *Company Overview* selection under *Overviews* is the default display when the mode opens. There are two selections under *Overviews: Company Overview and Related Indices & Sectors.**

**Company Overview**

The *Company Overview* page contains a great deal of information in one long scrolling page.

Some companies with a private aspect will have two tabs near the top of the page: **Public Profile** and **Private Profile.** The **Public Profile** tab is open when the page is first displayed.

The information on the **Company Overview** page is divided about 20 topics, including:

- Financial Summary
- Market Data
- Related Links
- Price & Volume: 1 Year
- Capital Structure
- Officers & Directors
- Segments
- Key Competitors

Those companies with a private aspect will have the same categories in the **Public Profile** tab. The **Private Profile** will have limited information, usually four categories: Business Description, Key Facts, Investment Rounds, and Historical Private Equity Investors. This can vary depending on the company being researched.

The **Company Overview** page has four icons near the top of the page: **Print, Export to PDF, Export to Full Company Report PDF** and Customize the Layout. The **Print** icon will print the current page.

The **Export to PDF** icon will open a PDF with the same information that is on the **Company Overview** page.
The Export to Full Company Report PDF icon will open a PDF report of more than 15 pages. This report will have detailed information about the company.

The Customize the Layout icon is not operational at the time of this writing.

Related Indices & Sectors

The Related Indices & Sectors selection will open the Industry Groups and Sectors page. This page has five tabs across the top: S&P GICS (Global Industry Classification Standard), DJ/DJ Stoxx, FTSE International, ICB (Industry Classification Benchmark), and Indices. Each of these tabs will display information pertinent to the tab topic.

The S&P GICS tab is pictured at right. Depending on the company being researched, not all tabs will have data to display.

You may change the company whose information is being displayed by typing a new ticker into the Symbol box and clicking on the Go button. Also, the display may be modified by selecting other options from the drop-down menus of the Layout and Sort By boxes.

News & Corporate Events

The News & Corporate Events selection in the Company Views mode has five selections under it: News (the default display when News & Corporate Events is opened), Significant Developments, Corporate Events, Event Briefs, and Event Transcripts.

The News page has two tabs: Real Time News and Top News. The Real Time News tab displays recent articles, divided according to the date. Clicking on a title will open the article in the lower part of the page.

The Top News tab displays articles from a variety of sources. This is the same page that is opened in the Top News selection in the Market Views mode.

On the Significant Developments page you may display other articles by clicking on the arrow icon on the right side of the header. This will expand the search controls for this page. Make selections from the data field drop-down menus and click on the Search button. This will change the display of articles to those that meet your new criteria.

Clicking on an article’s name will display it in the same box.

The other selections under Corporate Events will open other pages with information. The current subscription does not include briefs and transcripts.
Corporate Governance

The Corporate Governance selection has two items under it: Takeover Defense and Shareholder Activism.

The Takeover Defense page is displayed when this selection is first opened. The page has four tabs: Current Takeover Defense Profile, Historical Takeover Defense Profile, Comparable Analysis and Poison Pills. Each of these tabs will display information concerning the policies the company has implemented to prevent a hostile takeover.

The Shareholder Activism page will display any recent campaigns against the company.

Price Chart

The Price Chart selection under the Company Views mode has one item under it: Price Chart.

This selection opens the Thomson Charts Plus page with an interactive chart. You may change the company being displayed, the time period, frequency and chart style.

In addition to this you may compare the company other companies (up to 20), an index and display other data and indicators.

The icons in the upper right allow you to export the data to Excel or the chart image to the clipboard.

Fundamentals

The Fundamentals selection under the Company Views mode has three items under it: Financial Reports, Reuters Fundamentals, and Comparables.
The **Financial Reports** page is displayed when this selection is first opened. This page has five tabs: **Balance Sheet**, **Income Statement**, **Cash Flow Statement**, **Ratios**, and **Summary**. Each of these will display a spreadsheet of pertinent data. The display may be changed to show annual or other information by selecting different options from the drop-down menu in the **Report** box. The annual selections will display five years of data.

The header for each of these tabs has three icons: **Export Current Report** (to Excel), **Export Current Report** (in PDF), and **Export All Reports** (to Excel).

The **Export All Reports** will export all five tabs to Excel. The report will display the data that is selected in the current report (e.g., Interim, Annual, etc.) for all reports.

The **Reuters Fundamentals** page has seven tabs (**Balance Sheet**, **Income Statement**, **Cash Flow Statement**, **Ratios**, **Summary**, **Segments**, and **Metrics**), each displaying a table of data. Each tab has a Display Options section that allows you to modify the data being displayed.

This page allows you to Export the data to Excel.

The **Comparables** page give you three tabs (**Market Data & Price Multiples**, **EV Multiples & Credit Ratios**, and **Key Financials & Effectiveness**) of data comparing the company you are researching with its major competitors.

This data may also be exported to Excel.
Estimates

The Estimates selection under the Company Views mode has five items under it: Consensus Estimates, Detail Estimates, Earnings Surprise, Estimate Activity, and Estimate History.

Consensus Estimates

The Estimates selection opens with the Consensus Estimates selection Company Forecast page display. This page opens with the current financial status of the company, and an estimate for the current year performance. Hovering the mouse pointer over the table causes a Mean column to appear.

The data display may be changed to reflect past data or future estimates by selecting years from the Fiscal Year box drop-down menu. The menu offers about five years of future selections. The further into the future, the data is more general and limited.

Select the date and click on the Go button to change the display.

Detail Estimates

The Detail Estimates selection opens the Company Detail Forecasts page. This page offers another set of data, including a variety of analysts' estimates. The data display may be changed by selecting dates from the Period box drop-down menu. Four years or so of future estimates are available.

Earnings Surprise, Estimate Activity, and Estimate History

The Earnings Surprise, Estimate Activity, and Estimate History selections open more pages of estimate information. The Estimate Activity and Estimate History selections allow you to change the displays to reflect other periods.
Debt Overview

The Debt Overview selection under the Company Views mode opens the Debt Overview RK page. This page shows you a display of the company’s debt, including the number of issues outstanding, total face amount outstanding and total amount issued. It also has both current and historical agency ratings and lets you see detailed information on individual loans and bonds.

Deals

The Deals selection under the Company Views mode has one item: Company Deals.

The selection opens with the Company Deals page displayed. This page has two tabs: Deals and Shelf Takedowns.

The Deals tab is divided into five sections: Deal Summary, Banking Relationships, Largest Deals, Deal Statistics and Deal List. Each section gives information concerning deals in which the company being researched is involved.

The Chart button in the upper right allows you to toggle between a chart display and a table display. The List button will display the Deal List.

You also may export the page to Excel or to a PDF file.

The Shelf Takedowns tab displays shelf takedown information.
Share Ownership

The **Share Ownership** selection under the **Company Views** mode has three selections under it: **Ownership Summary**, **All Shareholders** and **Shareholder Momentum**.

All three pages give you information about the owners and shareholders of the company you are researching.

The **Ownership Summary** page is displayed when the Share Ownership selection is first opened. This page has seven tabs across the top, each one will display a different set of information concerning company ownership. The tabs are: **Firms**, **Funds**, **Insider Summary**, **Insider Transactions**, **Non-Holders**, **UK Raw Beneficial**, and **UK Raw Nominee**. Not every tab will have data for every company.

The various pages may be exported to Excel by clicking on the Excel Download icon in the upper right corner of the page. Some may also be exported in PDF format by clicking on the PDF Download icon.

The **Recent Downloads** link will open a window with a listing of downloads, if any have been made.

Research

The **Research** selection under the **Company Views** mode has one item under it: **Company Research**. This opens the **Company Research—Embargoed** page. The page has a list of research reports. Access to these reports is not part of the current subscription.
Filings

The Filings selection under the Company Views mode has two items: Company Filings and Delta Reports. The Company Filings page is displayed when this selection is first opened. This page lists the filings the company has submitted to the SEC.

The top of the page lists the latest key filings. You may view the filing by clicking on the name of the filing in the Filing Type columns. This will open the report in a new window.

The other table lists the rest of the reports. The first column has icons that indicate the formats in which the report is available. These are HTML, As Filed, PDF and Word. Clicking on the icon will open the report in a new window.

Selecting Delta Reports will open the Delta List page. This page will have a list of the delta reports that are available.

Note: An SEC Delta Report identifies changes between two sequential SEC Filings of the same form type, currently available in annual 10-Ks and quarterly 10-Qs. The filings are compared and changes in the text are highlighted and numbered in the Delta Report.

Officers & Directors

The Officers & Directors selection under the Company Views mode has two items: Officers & Directors and Officer Detail.

The Company Officers and Directors Report page is displayed when this selection is first opened. This page lists the top personnel of the company. Columns list information such as age, position, and various dates. Each name is link that will open a page with more detail about that person. This is the same page that will be displayed when the Officer Detail selection is opened.

The Officer Detail page has the top personnel listed in a drop-down menu in the Officers box. Selecting a name from this list will open the detailed information about that person.
Market Views Mode

The Market Views mode is opened by clicking on the Market Views selection in the mode column. This will open the Market Views table of contents at the top of the mode column.

Market Views Selections

The Market Views mode has six main topics, most of which have selections under them. The main selections are: News (the opening display), Deal Activity, Corporate Events, Corporate Governance, Economics, and Benchmark Bonds.

News


Clicking on one of the selections will display the articles included in that area in the main part of the page. Clicking on an article’s title will open the article in the display area.

The Market Overview selection will open the Market Overview page. This page lists various indices, bonds and other instruments grouped in topic tables: Equity Indices, FOREX, Government Bond Yields, LIBOR, and Commodity Futures.

Each table entry has an icon that will open a menu with three selections: Chart 1 Year, Chart - Intraday, and Go to Advanced Charting.
Clicking on **Chart 1 Year** or **Chart - Intraday** will open a chart in a new window. The **Go to Advanced Charting** selection will open the **Price Chart** page in the **Company Views** mode. See page 9 for information about the **Price Chart** page.

The **Market Overview** page has 13 tabs across the top of the page: **Global** (the initial display), **US**, **Americas**, **EMEA**, **Asia Pacific**, **Equity Indices**, **ETFs**, **Mutual Funds**, **Currency**, **Commodities**, **Government Bonds**, **Most Active**, and **Pre-Market**. Each of these tabs will open similar pages with tables of data pertinent to the tab’s topic. Each table will have similar characteristics as the ones on the **Global** tab.

The **Significant Developments** selection will open the **Market Significant Developments** page. This page lists articles about important happenings. Clicking on a title will open the article in the same table cell. You may close the article by clicking on the title again.

You may export the table to Excel or PDF by clicking on the **Excel** or **PDF** icon. The entire table will be exported if no check box has been selected. If you select one or more articles and then click on the icon only those articles selected will be exported.
Deal Activity

The Deal Activity selection under Market Views has four items under it: M&A, Equity, Bonds, and Loans. Each of these also has a submenu with the same four items: Market Overview, Recent Deals, League Tables, and Volume Trends.

Each of these pages is similar to the other pages of the same names.

Overview

All Overview pages are a long scrolling page with charts and tables. Each section of the pages have headers with Details links. Clicking on this link will display the data from that section in a table.

Clicking on an entity name (e.g., industry) in some tables or icons in others will open lists of deals. These lists give detailed information about the various deals or the companies involved in the deals. Some tables have icons for View Deal Tearsheets, View Filings, and View News.

Recent Deals

The Recent Deals selections will open pages with tables of information about companies involved in deals.

The Recent Deal page under the M&A selection will have two tabs: Announced and Completed. Both tabs are similar.

There are icons in the top section of the page where you may download the table of information to Excel or print it.
The top part of the table has boxes (Announced or Completed, Target Public Status, Target Industry, and Target Region) where you may make selections from the drop-down menus to modify the companies displayed in the table. Click on the Go button to display the selections you have made.

There are also two buttons (Export Tearsheet and Print Tearsheet) that allow you to export or print selected company deal information. Companies are selected by clicking on the check box beside the company name so that a check mark appears in the box. More than one may be selected at a time.

Each company line includes one or two icons that represent data that may be viewed. These are View Deal Tearsheets and View Filings.

The Recent Deals pages under the Equity, Bonds, and Loans selections are similar to each other. These pages will have two, three or four tabs (Calendar, Pipeline, Withdrawn and Completed). The Calendar tab (under the Equity selection only) will have a calendar with tickers listed in each day indicating when the various deals were scheduled. Clicking on a ticker will open a deal tearsheet with the deal information.

The Pipeline, Withdrawn, and Completed tabs are all similar to and operate in a similar fashion as the Recent Deals page under the M&A selection. Please go to page 17 for information about using these tabs.

Corporate Events

The Corporate Events selection under the Market Views mode has three items under it: Corporate Events, Event Briefs, and Event Transcripts. Each of these selections will open pages with information concerning corporate events.

Note: The information is very limited with the current subscription.

The subscription also does not cover the content of briefs and transcripts.
Corporate Governance

The Corporate Governance selection under the Market Views mode has one item under it: Shareholder Activism.

The Shareholder Activism page is automatically opened when Corporate Governance is selected.

This page is in six sections: Recent Activist Campaigns, Activist Campaigns by Industry, Activist Campaigns by Demand, Activist Campaigns by Status, Top Activists by Total Number of Campaigns, and Prominent Activists. The Recent Activist Campaigns section lists the companies that have had campaigns against them. The name of each company in the list is a link to that company’s Company Overview page. See page 7 for information about the Company Overview page.

Each company also has a Tearsheet icon that will open a tearsheet about the campaign in a new window.

The Prominent Activists section list the entities that are involved in campaigns. The name of each entity is a link that will open an information page about that entity in a new window.

Economics

The Economics selection under the Market Views mode has three items under it: Economic Indicators, Economic Events, and Economic Calendar.

The Economic Indicators page is displayed when the Economics selection is first opened. This page has two tabs: Key Indicators and Overview. The Key Indicators tab is usually the initial display when the page first opens.

The indicators displayed may be changed by selecting a different country (from about 120 selections) or category (about 80 are available) from the boxes at the top of the list.
The page is a table of indicators that are broken up into topics: Surveys & Cyclical Indexes, National Accounts, Money & Finance, Prices, Labor Market, Consumer Sector, Industry Sector, Government Sector, and External Sector.

Each name of an indicator is a link that will open the Overview tab with a display of that indicator’s chart and a table of data.

You may return to the list of indicators by clicking on the Key Indicators tab.

Each indicator has an icon next to its name. Clicking on this icon will open a chart in a new window.

Each chart will display up to fifty years of information.

**Economic Events**

The Economic Events selection under Economics will open the Economic Event List View page. This page has a list of economic events. The list may be filtered by changing the dates or classification settings at the top of the page.

Clicking on the title of an event in the list will open an Events Details page in a new window.

**Economic Calendar**

The Economic Calendar selection will open the Economic Calendar page. This page lists events on a long scrolling calendar. The events of each day are listed in the date cell. This makes the cells very long and to get to the next week you must scroll to find it.

Clicking on the title of an event in the list will open an Events Details page in a new window.
Benchmark Bonds

The Benchmark Bonds selection under the Market Views mode opens the Benchmark Bonds page.

This page has a graph at the top of page with about one year of United States 5 Year Yield activity.

The settings for this graph may be changed by using the selections on the right side of the page.

Below the graph is a table of bond data on about 25 countries.
Screening & Analysis Mode

The Screening & Analysis mode is opened by clicking on the Screening & Analysis selection in the mode column. This will open the Screening & Analysis table of contents at the top of the mode column.

Screening & Analysis Selections

The Screening & Analysis mode has six main topics, most of which have selections under them. The main selections are Companies (the opening display), Deals & League Tables, Share Ownership, Institutional Investors, Filings, and Individuals.

Companies

The Companies selection in the Screening & Analysis mode has one selection under it: Company Screener. This opens the Company Screening page.

The Company Screening page has four tabs: Search Library, Basic Search, Advanced Search, and Results. The Basic Search tab is displayed when the page first opens.

Basic Search Tab

The screen has three sections with the top section expanded and the bottom two contracted. Clicking on the Expand/Contract arrows for each section will cause each section to expand to display the options available.

The sections are Profile Criteria, Financial Criteria and Stock & Earnings Criteria. You may enter search terms or select as many or as few criteria as needed to make a search.

When you have made your selections/entered terms click on the Search button in any section and your search will be conducted.

Your search results will be placed in the Results tab, which is automatically opened. See page 25 for information about the Results tab.
Advanced Search Tab

Clicking on the Advanced Search tab will open a search page with three steps. The steps are: Step 1: Select Base Set to Search Against; Step 2: Select Items; and Step 3: Confirm/Refine Search Criteria.

Perform a search by completing each step.

1. In Step 1 open the drop-down menu and select the set you wish to use in your search. The choices are All Companies, Active Companies, and Quotes. Making a selection will place that set in the Search Criteria column for row 1 in the Step 3 table.

2. Step 2. Select the database to use in your search by opening the drop-down menu in the Database box. The choices are Personal, Thomson Financial, DataStream, IBES History, First Call, Private Company, and Worldscope. The default selection is Thomson Financial.

Next, select the Categories and search codes you want to use. The Categories box contains a list of topics. Each topic is a header for more topics below it. Click on the “+” sign and more topics will be revealed. As you click on the lowest level of topics, the codes in the right box will change. You may scroll up and down the list of codes until you find one you want.

Highlight the code and click on the Definition button if you need to know about this item. This will open the TAFieldDefinition window where a definition of the highlighted code is displayed.

Click the Select button to open the Thomson One Banker – Expression Builder window. This window allows you to complete setting up your search expression. The code item you selected is displayed in the Item box.

You have the option to select a specific Period. Also, the operator must be selected (the default is Greater than or equal) and a value must be entered in the Value box. Depending on the items selected, the number of selections in the Expression Builder window may be different.

There are additional criteria available for selection/de-selection in the right column.
As the expression is modified the changes show up in the Expression box at the bottom of the window.

When you are finished building your expression, click on the Add button.

This will place your expression in row 2 of the table in Step 3.

You may add more expressions using the Expression Builder. Each will be added to another row in the table in Step 3.

3. In Step 3 you have the ability to refine your search terms, add a query, or save your query. You may also change the currency used in the search results. The default currency is USD (U.S. dollars).

Clicking on one of your expressions in the table will open the Expression Builder window where you may replace the expression. The last column of the table has a red “X” for each row. Clicking on the “X” will delete that row.

Additional expressions may be added to the table by clicking on the Add Item link at the bottom of the screen. This will open the Expression Builder window.

When you have finished, click on the Search button and the search will be conducted.

Your search results will be placed in the Results tab, which is automatically opened. See page 25 for information about the Results tab.

Note: To save or view your set, the number of companies in the set must be at least one and less than 5001 companies. If your search results has too many companies they will not be displayed.

Search Library Tab

Clicking on the Search Library tab will open the Search Library page. This page has numerous topics divided into general topics such as Regions & Countries, Sectors & Industries and Analytics. Clicking on a topic will open a window where you may select a specific item from a list.

For example, clicking on Country Breakdown will open a window where you may scroll down a list of countries or search for a country by entering a term in the Search Codes box and clicking the Search button.

Once you have a country highlighted, click on the Select button to place it in the Selected Codes box.

Clicking on the Add button starts your search. Your search results will be placed in the Results tab, which is automatically opened. See page 25 for information about the Results tab.
Results Tab

When a search is made in the Search Library, Basic Search, or Advanced Search tabs the results are automatically displayed in the Results tab.

The search results are displayed in a Result Data table. The companies are displayed with a maximum of 150 companies per page.

The company names in the Result Data table are links to that company’s Company Overview page in the Company Views mode. See page 7 for information about the Company Overview page.

The other columns in the table display data that you selected in your original search (e.g., market sector, country code, etc.)

Results Page Tabs

Across the top of the table is a row of tabs. These tabs (Search Data, Profiles, Financials, Market Data, Key Items (not displayed for all searches), and Report Writer) are used to display information about the companies in your search results list. The default display is to have the Search Data tab open to the Result Data table.

Profiles Tab

Clicking on the Profiles tab will display the search result companies in a Profile Info table.

The company Name and Quote Symbol columns display that information about the company in each row. Each of these items are links that will open the Company Overview page for that company. See page 7 for information about the Company Overview page.

The other columns display CUSIP, SEDOL, Country, Exchange, and Primary SIC Code information about each company.
Financials Tab

The **Financials** tab displays the search result companies in a *Key Financials* table. The company name is a link to that company’s *Company Overview* page. See page 7 for information about the *Company Overview* page.

Market Data Tab

The **Market Data** tab displays the search results companies in a *Key Market Data* table. The company name is a link to that company’s *Company Overview* page. See page 7 for information about the *Company Overview* page.

Key Items Tab

The **Key Items** tab displays the search results companies in a *Key Items* table. The company name is a link to that company’s *Company Overview* page. See page 7 for information about the *Company Overview* page.

Report Writer Tab

Clicking on the **Report Writer** tab opens a drop-down menu with two selections, *Open a Saved Report* and *Create Report*.

The *Open a Saved Report* selection will open the *Thomson One Banker – User Storage* window with any saved reports listed. Double click on a report to have the report displayed in the *Report Writer* tab.

The *Create Report* selection will open the *Search Report Creator* window. You may use this window to select items to have displayed in a customized report. Items in the *Selections* box are those that will be displayed in your report. Click on the OK button when you have selected the elements for your report. This will display the report in the *Report Writer* tab.

Once a report is displayed in the *Report Writer* tab, the tab has a secondary menu with three selections, *Create/Edit Report*, *Open a Saved Report*, and *Save Custom Report*. The *Create/Edit Report* and *Open a Saved Report* selections open the same windows as the two selections in the *Report Writer* drop-down menu. The *Save Custom Report* selection allows you to name and save the report you have created.

The report is displayed in a *Result Data* table, with column elements corresponding to the items you selected in the *Search Report Creator* window. If you open a saved report, the report name will be displayed instead of “Result Data.”
Deals & League Tables

The Deals & League Tables selection under the Screening & Analysis mode has six items under it: Advanced Search (the opening display), M&A, Equity, Bonds, Loans, and Project Finance. Except for the Advanced Search selection, each of these have more items under them.

Advanced Search

The Advanced Search page is opened when Deals & League Tables is selected. This page has the first step for setting up your search. On this page you select the databases to include in the search. When you have made your selections by clicking on the checkboxes next to your selections click on the Continue button to go on to the next step.

This will open a new Advanced Search page. This page allows you to select the data items you want to include in the search. The data items section has two tabs: Item List and Item Search. The Item Search tab allows you to search for items while the Item List tab allows you to browse for items to include.

Clicking on an item on this list will open a dialog window where you may search for and select items to include in your search. Selected items will be displayed in the Search List box.

Once you have populated the Search List box you may view the results by clicking on the Preview button. Clicking on the Results tab or Execute button do not produce any results. The results are displayed on a Quick Display page under the Results tab.
The results are displayed in a table with tearsheet and filing icons by each entry. Clicking on a View Deal Tearsheet icon will open the tearsheet for that deal in a new window. The View Filings icon will open a window with a list of SEC filings that may be downloaded or viewed in a variety of formats.

The Quick Display page has four buttons across the top of the list: Apply to Search, Exclude From Search, Export Tearsheet, and Print Tearsheet.

The Export Tearsheet button will export to Excel the selected tearsheet, this is the same tearsheet that is opened with the View Deal Tearsheet icon.

The Print Tearsheet button will print the selected tearsheet.

The Apply to Search and Exclude From Search buttons will open the Advanced Search window with your original search criteria entered. A new criterion line is added to the Search List box specifically for the selected deal.

M&A, Equity, Bonds and Loans

The M&A, Equity, Bonds and Loans selections each have three items under them: Search Library, Quick Search and Advanced Search. Each of these selections are similar and operate in a similar manner in all four areas (M&A, Equity, Bonds and Loans). However, each area has pages tailored specifically for the area in which it is located.

The Search Library selections open the Search Library pages. Each page is divided into topics. Each topic has a list of items with two links: Year to Date and Year to Last Full Q. Clicking on one of these links will open a page of data.
The **Quick Search** selections will open the **Quick Search** pages. These pages are similar to each other and operate in a similar manner. These pages have a variety of criteria selections grouped into five sections: Date Criteria, Company Criteria, Deal Criteria, Advisor Criteria, and Financials Criteria. The different search pages have the headings tailored to the specific areas. Each section may be expanded or contracted by clicking on the arrow icons on the right side of each section header.

You may use data fields from one section or from all sections to set up the criteria for your search.

There are three buttons near the top of the page. These buttons are also repeated at the bottom of the page.

To clear all entries from the various sections click on the **Clear Search** button. The **Send Criteria to Advanced Search** button will take the criteria you have selected and enter it into the Advanced Search form. The Advanced Search form will be opened with the criteria entered. See page 27 for information about the **Advanced Search** pages.

The **View Results** button will start your search. The results will be displayed on a **Report** page.

The results are displayed in a table with tearsheet icons by each entry. Clicking on an icon will open the tearsheet for that deal in a new window.

The **Advanced Search** selections will open the **Advanced Search** pages. These pages are similar to the main advanced search page opened by clicking on the **Advanced Search** selection under **Deals & League Tables**. See page 27 for information about the **Advanced Search** page.
Project Finance

The Project Finance selection has one item under it: Quick Search. This opens the Project Finance Quick Search page. This page operates in a similar manner as the other Quick Search pages. See page 29 for information about the Quick Search pages.

Share Ownership

The Share Ownership selection under the Screening & Analysis mode has five items under it: Single Security Analysis, Single Security Momentum, Peer Analysis, Peer Momentum, and Holdings Detail.

The Single Security Analysis page is displayed when the Share Ownership selection is first opened.

If you have been researching a company, the company information is already entered into the Holding section. The other sections are blank until you choose criteria for the analysis.

Criteria are selected by opening windows and selecting criteria from established lists. The criteria windows are opened by clicking on the selections in the criteria column on the left. The column is divided into sections corresponding to the sections on the page (Holding, Ownership Details, Investor Attributes, and Report Settings). The Holdings section is the first one and has the original company entered. This company may be changed by clicking on the in Specific Security link in the column. This will open the Security Lookup window where you may search for a different company. Clicking on the OK button will return you to the Single Security Analysis page.

The other sections may have criteria added in a similar manner. Click on the criterion type you want to use to open the lookup window for that criterion (e.g., Filing Type Lookup). All the lookup windows operate in a similar manner. Select or find the criterion you want, then click on the OK button to move the criterion to the Single Security Analysis page. Some lookup windows allow you to select only one item while others allow you to select as many as you need.
When you have finished setting up your analysis click on the **Results** tab near the top of the page. The results will be displayed in the main part of the page, replacing the criteria selection feature.

The results are displayed in a table. Each line in the table is a different investor. Clicking on the name will open an information page about that investor.

The other selections under **Share Ownership** (Single Security Momentum, Peer Analysis, Peer Momentum, and Holdings Detail) operate in a similar manner (the **Peer Analysis** page is pictured).

**Institutional Investors**

The **Institutional Investors** selection under the **Screening & Analysis** mode has three items under it: **Search Firms**, **Search Funds**, and **Target Investors**.

The **Search Firms** item is displayed when the **Institutional Investors** selection is first opened. This opens the **Firm by Name Screener** page.

The **Search Firms** and **Search Funds** selections’ pages are similar and operate in the same manner. Each has a search function near the top of the page. To make a search enter a name into the data field. You have the option to select whether the search term you entered is searched as **Begins with**,** Contains**, or is an **Exact Match** with the target firms. You also may include Strategic Entities by clicking on the check box next to this selection. When you are ready, click on the **Go** button to begin your search.
The results of the search are displayed below the search function.

The list of firm or fund names has 11 columns of information. The firm or fund name is a link that opens a page with information about the organization.

The information page has five tabs across the top of the page. Each tab displays additional information about the organization. The tabs are Overview, Fundamentals, Mapped Funds, Contacts, and Who’s Who. This page also has a button and two icons in the top right corner of the page. The open tab may be downloaded in either PDF or Excel format by clicking on one of the icons.

The View Portfolio button opens a list of companies, in a new window, in which the firm has investments.

The Target Investors selection under Institutional Investors opens a page with a search function that has three sections. When the page first opens there are no criteria selected. To populate the sections with criteria you must select the criteria from the menu column on the left side of the page. The menu column is divided into three sections.

Clicking on a category in the menu column will open a window with the criteria selection function for that item. More than one criteria may be selected. Each criterion has to be added to the main search function page before the window is closed. This system is similar to the search function for the Single Security Analysis selection under Share Ownership in the Screening & Analysis mode. Please go to page 30 for information about how this search function works.
Filings

The Filings selection in the Screening & Analysis mode has one item under it: Filings Search. This selection opens with the Advanced Filings Component page displayed.

This selection allows you to search for SEC filings for companies. Enter the company information (name, ticker, ISIN, CIK or CUSIP) into the first box.

Select the other options you want to use (time period and filing category) from the drop-down menus.

You also may expand the lower section of the page to display more search options.

After making your selections and entering any other data you may wish to use click on the Search button at the bottom of the page.

The search results will be displayed in a table below the search form.

The first column has icons that indicate the formats in which the report is available. These are HTML, As Filed, PDF and Word. Clicking on the icon will open the report in a new window.

Individuals

The Individuals selection in the Screening & Analysis mode has two main items under it: Officers & Directors and Institutional Contacts. Each of these has two or three items under them.

Officers & Directors

The Officers & Directors selection has three items: Search Officers & Directors, Connections, and Corporate Relationships. The Search Officers & Directors selection is opened when the Individuals selection is first opened. This displays the Officer & Director
Search page. To search for people enter search terms into as many of the four boxes you wish to utilize. Only one box is needed but placing terms in more will narrow the search. Click on the Search button when you are ready to start the search.

The results are displayed in a table on a new page. The list of names are links to information pages for that person. It includes some personal information and information about the company with which he or she is associated.

The Connections selection opens the Officers and Directors Connections page. This page has two boxes for data entry. Enter a name into the Officer 1 box and click on the magnifying glass icon. This will display a list of officers to choose from. Click on your choice and it will be displayed in the box. Do the same for the Officer 2 box. Click on the Update View button to display any relationships between the two officers.

The Corporate Relationships selection opens the Officer and Director Corporate Relationships page. Enter a search term into the Search box (Last Name and First Name) and click on the Go button. This will display a list of company officers. Select the one you want to research and click on the Update View button. This will display a list of relationships for that officer. You have the option of displaying a detailed listing of information about that officer.
Institutional Contacts

The Institutional Contacts selection has two items under it: Name Search and Target Contacts. The Contact by Name Screener page is opened when Institutional Contacts is selected. You have the option to search for contacts by First Name, Last Name, Contact City or Investor Name. Enter search terms into one or more of the boxes and click on the Go button.

Any people who meet your search criteria are listed in a table below the search function. Clicking on a person’s name will open an information page about her or him.

Clicking on a company name will open an information page about that company. The company information page is the same as the page opened in the Institutional Investors selection under the Screening & Analysis mode. See page 32 for information about this information page.

The Target Contacts selection will open the Contact Screener page. This page is a search function with a criteria menu column on the left side of the page.

This page is similar to and operates in a similar manner as the pages under the Share Ownership selection in the Screening & Analysis mode. See page 30 for information on the operation of this page.
Tools & Tips Mode

The **Tools & Tips** mode has two selections: **What’s New** and **Product Downloads**.

The **What’s New** selection opens the *What’s New* page. This page has information about any new developments for the database.

There are five links on the upper right side of the page: **Customer Support**, **Training**, **Sales Request**, **Download Center**, and **Submit Your Feedback** (not active for the current subscription).

The **Customer Support** selection opens a page with contact information for Thomson Reuters.

The **Training** selection opens a Thomson Reuters Knowledge Network page with information about various training options that are available. These training items require sound software that may not work on the Business Library’s database server. Arranging training sessions for this database is not a function of the Business Library.

The **Sales Request** selection provides a form for you to give your contact information so that a sales representative can contact you to sell you a subscription to a Thomson Reuters product.

The **Download Center** selection opens the *Products Download* page. This is the same page that is opened when the **Product Downloads** menu selection is used. This page has information and download links for various applications for the database. Any download attempts will not be allowed by the server. Any downloads must be performed by IT personnel.

The **Submit Your Feedback** selection is not active for the current subscription.