Mergent WebReports
A User’s Guide

Welcome to Mergent WebReports. This user guide will show you everything you need to know to access and utilize the wealth of information available from Mergent WebReports.

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.

Other College of William & Mary students, faculty and staff may access Mergent WebReports by going to the Earl Gregg Swem Library home page at http://swem.wm.edu.

Select Research on the Home page header, then Library Databases in the menu column on the left. On the Library Databases page select Business & Economics in the Categories data field on the right and click on the Apply Filters button. Mergent WebReports will be on the list displayed.

Introduction

Mergent WebReports includes company annual reports, prospectuses, industry reports and other company related documents in PDF image formats. Access more than 300,000 documents covering over 50,000 global companies from over 100 countries.
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The Opening Screen

Mergent WebReports opens with a Welcome page displaying a header with three links, a Search Mergent WebReports link to open the Search page (see page 4), and a listing of recent industry reports (this is not an active list with links to the reports).

Header Links

The header has three links: Contact Us, Help and Logout.

Contact Us

The Contact Us link will open a page with contact information. If you need assistance with the WebReports program please contact a member of the Business Library staff. If the company must be contacted the staff will perform this duty.

Help

The Help link will open a Help page in a new window. This page gives you various tips for using the program.

Logout

The Logout link will close the program.
Search Page

The Search page is displayed when you first enter the program from the Opening screen. This page has the same links in the header as the opening page (plus a Home link to return you to the Opening screen).


Each of these tabs will open a different search page. The **Company Search** tab is displayed when the program is first entered.

**Company Search Tab**

The **Company Search** tab has four boxes: **Company Name**, **Ticker**, **CUSIP** (Committee on Uniform Security Identification Procedures—maintained by S&P for the American Bankers Association), and **CIK** (Central Index Key). The **Ticker**, **CUSIP** and **CIK** data fields will only search U.S. and Canadian companies.

Entering a search term into one of these boxes and clicking on the **Search** button will open a **Company Search Results** page. This page has the results in a table with seven columns. The first column, **Company**, lists the company name. Each name is a link to that company’s **Company** page. See page 11 for information about the **Company** page.

The other columns are **Ticker**, **Exchange**, **CUSIP**, **CIK**, **Country** and **Region**.

You may return to the Search page by clicking on the **New Search** link at the top of the page.
Corporate Manual Search Tab

The Corporate Manual Search tab has three boxes: Company Name, Manual, and Year. The Manual and Year boxes have drop-down menus with lists from which you may make a selection.

Entering a search term into the Company Name box and making selections from one or more of the other menus (optional) and clicking on the Search button will open a Corporate Manuals Search Results page.

This page has the results displayed in a table of six columns: Company, Year, Manual, Volume, Page, and PDF.

The Company column lists the names of the companies found in your search. These names are not links to Company pages.

The Year column indicates the year of the corporate manual in which a report for this company is included.

The Manual column has links (i.e., Bank & Finance, Industrial, etc.) to the entire manual for the investment sectors indicated. The manual will be opened in a new window.

The manual may be of considerable length (i.e., 3062 pages) and some may be very old (i.e., 1930). These are scans of the individual pages of the original printed manual. Some pages may be out of order.

The Volume column indicates the volume of the manual.

The Page column indicates the page of the manual on which the company is reported. These page numbers are links to the actual page of the manual. Clicking on the link will open the entire manual, the same manual as the link in the Manual column, but the manual will be opened to the correct page.

The PDF column has icons that will open the manual in PDF format. Clicking on the icon...
will open the *File Download* window where you are given the choice of either opening or saving the file.

Clicking on **Open** will open the file using Acrobat Reader. This is the same manual that is opened in the other columns but is in PDF format and only includes the cover and pages that pertain to the company selected.

The **Save** button will open the *Save As* window where you are prompted to name the file and select the location to save it.

You may return to the *Search* page by clicking on the **New Corporate Manuals Search** link at the top of the page.

**Municipal Manual Search Tab**

The **Municipal Manual Search** tab has two boxes: **Issue Name** and **Year**. The **Year** box has a drop-down menu with a list of years from which you may make a selection.

Entering a search term into the **Issue Name** box, selecting a year (optional) and clicking on the **Search** button will open a **Municipal Manuals Search Results** page.

This page has the results displayed in a table of six columns: Company, Year, Manual, Volume, Page, and PDF.

This table is similar to and operates in a similar manner as the **Corporate Manuals Search Results** page. See page 5 for information about this page.

You may return to the *Search* page by clicking on the **New Municipal Manuals Search** link at the top of the page.
Annual Report Search Tab

The annual Report Search tab has six boxes in three groups: Company, Region/Country, and Sector.

The Company group has two boxes, Company Name and Ticker, that you may use to enter search terms.

The Region/Country group has two boxes, Region and Country, with drop-down menus from which you may make selections.

The Sector group also has two boxes, SIC and NAIC, with drop-down menus from which you may make selections.

Entering a search term into the boxes and making selections from the other menus (optional) and clicking on the Search button will open an Annual Reports Search Results page.

This page has the results displayed in a table of nine columns: Company, Document Date, Ticker, Country, Region, File Size, Document Type, Language, and Report.

The Report column has icons that will open the report in PDF format. Clicking on the icon will open the File Download window where you are given the choice of either opening or saving the file.

Clicking on Open will open the file using Acrobat Reader.

The Save button will open the Save As window where you are prompted to name the file and select the location to save it.

You may return to the Search page by clicking on the New Annual Reports Search link at the top of the page.
Industry Report Search Tab

The Industry Report Search tab has five boxes: Company Name, Industry, Region, Start Date and End Date. The Industry and Region boxes have drop-down menus with lists from which you may make selections. The Start Date and End Date boxes open calendars where you may select dates.

Entering a search term into the Company Name box, selecting an industry or region and date range (optional) and clicking on the Search button will open an Industry Reports Search Results page.

This page has the results displayed in a table of six columns: Document Date, Name, Description, Region, Industry, and Report.

The Report column has icons that will open the report in PDF format. Clicking on the icon will open the File Download window where you are given the choice of either opening or saving the file.

Clicking on Open will open the file using Acrobat Reader.

The Save button will open the Save As window where you are prompted to name the file and select the location to save it.

You may return to the Search page by clicking on the New Industry Reports Search link at the top of the page.
Equity Report Search Tab

The Equity Report Search tab has three boxes, Company Name, Ticker, and CUSIP, and numerous other selections in two groups: Other Criteria and Industries.

The Other Criteria group has 11 criteria. A criterion is selected by clicking on the radio button next to the criterion. Only one criterion may be selected at a time in this group.

The Industries group has an expanding list of industries. The list may be expanded by clicking on the plus signs next to the topics. The list may be expanded until a document symbol is displayed. This indicates the lowest level of that section.

Industries are selected by clicking on the check box next to the item. Clicking on a topic heading check box will also select all the items within that topic.

Entering a search term into the Company Name, Ticker or CUSIP boxes, selecting other criteria (optional) and clicking on the Search button will open an Equity Reports Search Results page.

This page displays the results in a table with five columns. The Company column lists the names of the companies found in your search. Each company name is a link that will open the Company page for that company. See page 11 for information about the Company page.

The Report column has icons that will open the report in PDF format. Clicking on the icon will open the File Download window where you are given the choice of either opening or saving the file.

Clicking on Open will open the file using Acrobat Reader.
The **Save** button will open the **Save As** window where you are prompted to name the file and select the location to save it.

You may return to the **Search** page by clicking on the **New Equity Reports Search** link at the top of the page.

**EDGAR Search Tab**

The **EDGAR Search** tab has seven boxes in two groups. The **Filer group** has four boxes: **Conformed Name**, **CIK**, **IRS Number**, and **State/Country of Incorporation**. The **State/Country of Incorporation** box has a drop-down menu from which you may select an item.

The **Filing group** has three boxes: **Submission Type**, **Start Date** and **End Date**. The **Submission Type** box has a drop-down menu from which you may select an item. The two date boxes display calendars on which you may select dates.

Entering a search term into the **Conformed Name**, **CIK**, or **IRS Number** box, selecting other criteria and clicking on the **Search** button will open an **EDGAR Document Search Results** page.

This page displays the results in a table with eight columns. Only the **Accession Number** column has active links. Clicking on a link in this column will open the document in a new window.

You may return to the **Search** page by clicking on the **New EDGAR Document Search** link at the top of the **EDGAR Document Search Results** page.
Company Page

Selecting a company name from one of the search results lists will open the Company page for that company. The Company page has a header with four links (see below) and six tabs (see page 12).

The page opens with the Company Details tab displayed.

Header Links

The links on the Company page header are: Home, Contact Us, Help and Logout.

The Home link will take you to the Mergent WebReports Opening screen. You will have to click on the Search Mergent WebReports link to re-enter the database.

The Contact Us, Help and Logout links are the same as those on the Opening screen. Please go to page 3 for information about these links.
Company Page Tabs

The Company page has six tabs: Company Details (with three more tabs), Annual reports, Industry Reports, Equity Reports, Bond Reports, and EDGAR Filings.

Company Details Tab

The Company page opens with the Company Details tab displayed. This tab has three tabs of its own: Company Information, Financial Summary, and Equity Pricing.

Company Information Tab

The Company Information tab is open when the Company Details tab is first displayed.

This tab has general information about the company, a business summary and a list of key executives.

Financial Summary Tab

The Financial Summary tab has four more tabs: Financial Highlights, Profitability Ratios, Liquidity Indicators, and Per Share.

Each of these tabs will display a table of information about the company’s financial status.

Equity Pricing Tab

The Equity Pricing tab also has some tabs: Charts and Historical Pricing. The Charts tab is displayed when the Equity Pricing tab is first opened. This chart shows about three years of pricing data, including a volume chart at the bottom of the page.
The **Historical Pricing** tab displays a table of information. You may choose to display **6 Months**, **1 Year**, **2 Years** or **3 Years** of information by clicking on the tabs near the top of the display.

Each table consists of multiple pages. The **3 Years** table pictured has 51 pages of information. You may navigate through the pages by using the arrow buttons at the bottom of the page. You also have the option to enter a number into the box and press the **Enter** key to go directly to the desired page.

**Annual Reports Tab**

The **Annual Reports** tab opens with a table of reports. The table has about ten years of reports available.

The Report column of the table has icons that are links to reports in PDF format. Clicking on an icon will open a **File Download** window.

Clicking on **Open** will open the file in a new window using Acrobat Reader.

The **Save** button will open the **Save As** window where you are prompted to name the file and select the location to save it.

Clicking on the **New Annual Reports Search** link in the **Annual Reports** tab header will open the **Annual Report Search** tab so that you may search for annual reports from other companies. See page 7 for information about the **Annual Report Search** tab.
Industry Reports Tab

The **Industry Reports** tab opens with a table of reports. The table has numerous reports available. There may be reports from many different industries, depending on how many industries in which the company being researched does business.

The tab may have more than one page. You may navigate through the pages by using the arrow buttons at the bottom of the page. You also have the option to enter a number into the box and press the **Enter** key to go directly to the desired page.

The Report column of the table has icons that are links to reports in PDF format. Clicking on an icon will open a *File Download* window.

Clicking on **Open** will open the file in a new window using Acrobat Reader.

The **Save** button will open the *Save As* window where you are prompted to name the file and select the location to save it.

Clicking on the **New Industry Reports Search** link in the **Industry Reports** tab header will open the **Industry Report Search** tab so that you may search for reports from other industries. See page 8 for information about the **Industry Report Search** tab.

Equity Reports Tab

The **Equity Reports** tab opens with a table of reports. The table may have only one report (or none). This table has several links. The **Company** column lists company names. Each name is a link to that company’s **Company** page. Clicking on the
same company you are currently researching will open the Company page at the initial point of the Company Details tab.

The Report column of the table has icons that are links to reports in PDF format. Clicking on an icon will open a File Download window.

Clicking on Open will open the file in a new window using Acrobat Reader.

The Save button will open the Save As window where you are prompted to name the file and select the location to save it.

Clicking on the New Equity Reports Search link in the Equity Reports tab header will open the Equity Report Search tab so that you may search for other reports. See page 9 for information about the Equity Report Search tab.

**Bond Reports Tab**

The Bond Reports tab opens with a table of reports. The table may have many reports or none.

The Report column of the table has icons that are links to reports in PDF format. Clicking on an icon will open a File Download window.

Clicking on Open will open the file in a new window using Acrobat Reader.

The Save button will open the Save As window where you are prompted to name the file and select the location to save it.

**EDGAR Filings Tab**

The EDGAR Filings tab opens with a table of SEC filings. The entries in the first column (Accession Number) are links to the actual documents listed.
Clicking one of these links will open the document in a new window. The document is in one long scrolling page.

Clicking on the **New EDGAR Documents Search** link in the **EDGAR Filings** tab header will open the **EDGAR Search** tab so that you may search for other documents. See page 10 for information about the **EDGAR Search** tab.