

Table of Contents

Chapter 1 - Getting Started	1
Standard & Poor's Research Insight and the COMPUSTAT® (Global) Database ..	1
Selecting the COMPUSTAT (Global) Database	2
Choosing Default Styles	2
Helpful Resources	4
On-line Help	4
Web Site	4
Customer Support	4
Chapter 2 - Navigating Research Insight	5
Welcome to Research Insight Window	6
Research Insight Desktop	7
The Research Assistant	8
Research Assistant - Step 1 Window	8
Research Assistant - Step 1 - Classic View Window	10
Research Assistant - Step 2 Window	11
Research Assistant - Step 3 Window	13
The Report Assistant	14
Report Assistant - Step 1 Window	14
Report Assistant - Step 2 Window	15
Report Assistant - Step 3 Window	16
Report Window	18
The Chart Assistant	19
Chart Assistant - Step 1 Window	19
Chart Assistant - Step 2 Window	20
Chart Assistant - Step 3 Window	21
Chart Window	23
File Open Window	24

The Run Assistant	25
Run Assistant - Screen	25
Run Assistant - Set	26
Run Assistant - Report Time Periods	27
Run Assistant - Screen - Classic View	28
The Look Up List	29
Buttons	29
Look Up - Companies	30
Look Up - Items	31
Look Up - Functions	32
Look Up - Sets	33

Chapter 3 - Screening COMPUSTAT (Global) With the Research Assistant	35
Screening the COMPUSTAT (Global) Database	35
Defining Screening Criteria and Viewing the Results of a Screen	36
Changing Your Initial Set and Saving the Results of Your Screen	39
Accessing the Classic View of a Screen	42

Chapter 4 - Reports	45
Pre-Defined Reports	45
Modifying and Designing Your Own Reports	45
Running a Company Highlights Report	46
Running a Pre-defined Report	47
Running a Pre-defined Report on Multiple Companies	48
Creating a Table Report	50
Creating an Historical Analysis Table Report	52
Selecting Time Periods	54
Creating a Free-Form Report	54

Chapter 5 - Charts	59
Charts	59
Using Pre-defined Charts	60
Creating Your Own Charts	62
Modifying Chart Attributes	65

Chapter 6 - Translating Currencies	67
Currencies	67
How Currencies are Identified in Research Insight	68
Using the Look Up List to Find ISO Currency Codes	68
Using the Descriptions Dialog Box to Find ISO Currency Codes	69
How Research Insight Translates Data	70
Viewing the Exchange Rate Between Currencies	71
How to Translate Data Into a Target Currency	73
How to Run a Currency Screen	76
Commonly Used Currency Functions	78
Chapter 7 - Using Formulas and Functions	79
Formulas in Research Insight	80
Formula Components	80
Functions	80
Items	81
Company References	81
Sets	81
Time Period References	82
Concepts	82
Formula Operators	82
Parentheses	82
Using Parentheses (), Brackets [], and Braces { }	83
Mathematical and Relational Operators	84
Adding "Wildcards" to Your Formulas	85
Functions in Research Insight	86
The Parts of a Function	86
Currency Functions	86
Growth Functions	87
Historical Analysis Functions	87
Information Functions	88
Logical Functions	88
Mathematical Functions	89
Period Reference Functions	89
Reference Functions	90
Screening Functions	90
Set Analysis Functions	91
Statistical Functions	91
Text Functions	92
Database Control Functions	92

Chapter 8 - Using Standard & Poor's Research Insight with Excel .....	.93
Using a Research Insight Set to Create an Excel Spreadsheet .....	.94
Opening a Research Insight Report as an Excel Spreadsheet .....	.98
Using Excel and the Report Assistant to Create a Spreadsheet	100
Opening an Excel Spreadsheet Created with Research Insight	102
Open a Research Insight Chart in an Excel Spreadsheet	103
Using Excel and the Chart Assistant to Create a Chart	105
Advanced Active-X Technology Capabilities in Excel	109
Chapter 9 - Importing and Downloading .....	.111
Scheduling Imports and Downloads With the Task Scheduler .....	.112
Scheduling an Import .....	.112
Changing the Import Schedule .....	.115
Scheduling an Internet Download .....	.116
Establishing Your Internet Settings .....	.119
Changing the Internet Download Schedule .....	.119
Suspending a Scheduled Task .....	.120
Deleting a Scheduled Task .....	.120
Viewing Import and Download Results .....	.121
Importing Your Own Data into Research Insight .....	.122
Creating Your Spreadsheet .....	.122
Retrieval Keys .....	.123
Mnemonics .....	.123
Saving Your File .....	.123
Importing Your Data .....	.123
Importing Sets into Research Insight .....	.125
Creating Your Spreadsheet .....	.125
Importing Your Set .....	.125
Importing Concepts into Research Insight .....	.127
Glossary .....	.129
Index .....	.130