Chapter 2
Navigating Research Insight

This chapter describes the various windows, toolbars and buttons you will see in Standard & Poor's Research Insight. It shows you how to navigate through Research Insight by describing the elements of the

- Welcome to Research Insight window
- Research Insight desktop
- Research Assistant
- Report Assistant
- Chart Assistant
- Run Assistant
- Look Up List

Welcome to Research Insight Window

The Welcome to Research Insight window is your entry to the basic functions of Standard & Poor's Research Insight. When you click a button or corresponding text with your mouse, you will be taken to one of the many different functions of Research Insight. If you do not want this window to automatically display when you enter Research Insight, click the **Display on Startup** check box to turn off the default setting. Below is a description of each icon on the Welcome to Research Insight window.

Research Assistant: define your screening criteria, then develop custom reports and charts, or access pre-defined reports or charts.

Report Assistant: develop custom reports, then define your screening criteria.

Chart Assistant: develop custom charts, then define your screening criteria.

Company Highlights: run a financial highlights report for one or more companies.

Library: retrieve Business Descriptions and Trends and Projections.

Open Screen: open pre-defined screens or develop a new screen.

Open Report: open pre-defined reports or build a new report.

Open Chart: open pre-defined charts or build a new chart.

Open Set: open pre-defined sets or develop a new set.

Prices, News and Headlines: access Real Time for current prices and news.

Close

Closes the Welcome window and displays the Research Insight desktop.

Research Insight Desktop

The desktop provides another way to access all the features of Research Insight. It displays when you close the Welcome window, or whenever you click **Cancel** in the Research Assistant. To return to the Welcome window click the (**Welcome**) button or select **Welcome to Research Insight** from the **Help** menu. The buttons on the toolbar at the top of this window are described below.

The Research Assistant

The Research Assistant is a wizard designed to walk you through screening the database. The Research Assistant can also link to other wizards in Research Insight to build reports or charts with the results of your database screen. For more information on how to screen the database with the Research Assistant, see Chapter 3 - Screening with the Research Assistant.

Following is a description of each version of the three Research Assistant windows.

Research Assistant - Step 1 Window

This window lets you search for companies using specific screening criteria. You can conduct a broad search for companies that are in the same industry sector, economic sector, SIC, NAICS or GICS Code or country.

Using the Change Set feature, you can narrow your search criteria by selecting a specific set of companies as your starting point (e.g. S&P 500). Screening criteria can be narrowed further by using the tabs on the right side of the window, checking the necessary fields under each tab and selecting the ranges from the drop down lists.

Following is a description of each button displayed in this window.

	Opens the Look Up List where you can search for a company by name or ticker symbol.
Change Set	Opens the Initial Set dialog box where you can choose a set of companies as the starting point for your screen.
Open Screen...	Opens the File Open window, which allows you to open predefined or previously saved screens.
Clear	Erases information you have entered in the window.
Classic View	Opens the Research Assistant - Step 1 Classic View window, for access to more advanced screening options.
Reset	Restores the default settings of the window.
Save	Saves your screening criteria for use in future analysis.
Save As	Saves your screening criteria with a specific name in a specific location.
Customize...	Opens the Custom Indicators window, which allows you to customize Indicator Groups (e.g. Valuation, Market, etc.) and Indicator Items (e.g. Beta, Sales, etc.).
Next >	Opens the Research Assistant - Step 2 window.
Cancel	Closes the Research Assistant.
Help	Displays step-by-step Help topics.

Research Assistant - Step 1 - Classic View Window

This window allows you to view and modify the underlying Base Set and Formulas used in developing your screen. To modify information, click on the field, enter the new information on the command line and press Enter on your keyboard. This window is accessed by clicking the Classic View button on the Research Assistant - Step 1 window. <u>If you make modifications in this window, you cannot return to the Research Assistant - Step 1 window</u>. Following is a description of each button displayed in this window.

Open Screen...	Opens the File Open dialog box, where you can open predefined or previously saved screens.
Screen View	Returns you to the Research Assistant - Step 1 window (only if you have not modified any information).
Clear	Erases the information you have entered in the window.
Reset	Restores the default settings of the window.
Run	Calculates the results of your screen.
Run with Time Periods...	Calculates your results for a specific time period.
Print	Prints the formulas used in developing your screen.
Save	Saves your screening criteria for use in future analysis.
Save As	Saves your screening criteria with a specific name in a specific location.
Next >	Opens the Research Assistant - Step 2 window.

Research Assistant - Step 2 Window

The set of companies that passed your screen appear here

Add companies to your set here

Companies added to your set are displayed here

Companies removed from your set are displayed here

This window displays your screening results based on the criteria established in the first Research Assistant window. In this window, you can add companies to your set or remove any companies you do not want included in your set. You can also display the set by company name or ticker symbol. Following is a description of each button displayed in this window.

	Opens the Look Up List where you can search for a company by name or ticker symbol.
Add Company	Adds the ticker in the **Add Company to set** field to your set.
Save	Saves your set or your screen.
Save As	Allows you to save your set or your screen in a specific location with a specific name.
Reset	Restores your set to the last version saved.
Remove Company from Added list	Removes the highlighted company from the Company List and from the Added Companies list.
Remove Company	Removes the highlighted company from the Company List.
Restore Company	Inserts the highlighted company back into the Company List.
	Launches Market Insight, which gives you on-line access to up-to-date financial information through reports such as Country Overviews, Risk Reports, Company Profiles, Balance Sheet Statements, Income Statements, and Financial Analysis Reports. **Note:** Market Insight requires a separate subscription from Research Insight.
< Back	Returns you to the previous window (Research Assistant - Step 1).
Next >	Opens the Research Assistant - Step 3 window.

Research Assistant - Step 3 Window

Select another Research Insight function here

This window links the Research Assistant to additional Research Insight functions. The **Report Assistant** and **Chart Assistant** options take you to wizards that allow you to build customized reports or charts. The **Open Report** and **Open Chart** options allow you to run a pre-defined report or chart or build new ones. The **Company Highlights** option runs a company highlights report. Selecting **Finish** returns you to the Research Insight desktop.

Following is a description of each button displayed in this window.

< Back	Returns you to the previous window (Research Assistant - Step 2).
Next >	Opens the next window based on the selection made.

The Report Assistant

The Report Assistant is a wizard designed to walk you through building and running custom reports. Depending upon which type of custom report you choose to work with, the Report Assistant can consist of up to three windows. The Report Assistant can be used as an extension of the Research Assistant to build a custom report with the results of your database screen or by itself with the aid of the Run Assistant as the method you use to screen the database. For more information on how to work with a custom report using the Report Assistant, see Chapter 4 - Reports.

Following is a description of the three Report Assistant windows.

Report Assistant - Step 1 Window

This window is used to define specific report parameters when building your own report. It opens when you choose the Report Assistant option on the Research Assistant - Step 3 window, or when you click the Report Assistant button on the Research Insight desktop. You can create a report using the current time period, or you can choose to compare data items and companies over a specified period of time with an historical analysis report. If you are building a report for the current time period and you select **Companies vs. Items**, you can choose to display multiple companies in your report by entering the number of companies in the **Company Count** field.

Following is a description of each button displayed in this window.

< Back	Returns you to the previous window.
Next >	Opens the Report Assistant - Step 2 window.

Report Assistant - Step 2 Window

This window is used to select the broad item groups and specific data items within a group/category that you want to appear in your report. Following is a description of each button displayed in this window.

	Adds new items chosen from the Look Up List to the Selected Items area.
	Opens the Look Up List where you can search for a specific item to add to your report.
Customize...	Opens the Customize Item Sets dialog box where you can modify or create new item sets and items.
Add >>	Adds the items selected from the Items area to the Selected Items area.
Add All >	Adds all the items in the Items area to the Selected Items area, which lists all items that will appear on your report.
Remove <<	Removes any highlighted item(s) from the Selected Items area.
Edit...	Opens the Item Set Definition dialog box, where you can modify the highlighted Selected Item.
Definition...	Opens the Item Definition dialog box where you can view the definition of the highlighted Item
< Back	Returns you to the Report Assistant - Step 1 window.
Next >	If you are running an historical analysis report, this button opens the Report Assistant - Step 3 window.
Finish	If you are running a current time period report, this button opens your completed report.
Screen Items	Adds the items you used to screen the database to your report.
Move Up Move Down	Moves the selected item up or down one position in the list; this affects where the item will appear in the report.

Report Assistant - Step 3 Window

This window displays after you choose to build a report based on an historical analysis and select the item categories and specific items within a category that you want to appear on your report. This window lets you enter the **Beginning** and **Ending** Periods you want to use when you run historical analysis reports.

This window also gives you the option of selecting a Relative, Absolute or Calendar time period for your report.

The **Relative** time period requires a point of reference in order to determine which time period is being referenced (e.g. the last three years, the most recent four quarters, etc.). Relative enables you to rerun your report in subsequent periods without changing the reference. The default Beginning and Ending periods are **0** where **0** represents the most current time period (e.g. annual, quarterly, monthly, etc.) for which data is available. One period prior to the current period is indicated by [-1], two periods prior to the current period is indicated by [-2], etc.

The **Absolute** time period tells the exact time period and ensures that a specific time period's data is returned (e.g. May01 for May 2001 or Y01 for fiscal year 2001).

The **Calendar** time period is an exact calendar year, quarter, month, week or day. The calendar time period is always the exact year in which the time period ends. For example, suppose a company's fiscal year-end is May 2001. The calendar time period for annual data is 2001.

If you have selected data items with different periodicities (e.g. annual sales, quarterly EPS), this window will also prompt you to select an alignment for the data.

Following is a description of each button displayed in this window.

< Back	Returns you to the previous window (Report Assistant -Step 2).
Finish	Displays the Run Assistant window or your completed report, depending upon from where you accessed the Report Assistant.

Report Window

Click here to display the report, or its underlying formulas

This window displays a report according to the companies and criteria you established in the Research and Report Assistants. Under the **File** menu, you can choose to **Close** or **Save** your report, create a **New** report or **Open** an existing report. If you close or save your file, you will be taken out of the Research Assistant.

Click the (**Run**) button to access the Run Assistant window where you can modify your screening criteria for a report. To rerun the report with different data items, click the (**Rerun Assistant**) button or select Rerun Report/Chart Assistant from the Report menu. To return to the Research Assistant click the (**Research Assistant**) button on the desktop.

The Chart Assistant

The Chart Assistant is a wizard designed to walk you through building and running custom charts. Depending upon which type of custom chart you choose to work with, the Chart Assistant can consist of up to three windows. The Chart Assistant can be used as an extension of the Research Assistant to build a custom chart with the results of your database screen or by itself with the aid of the Run Assistant as the method you use to screen the database. For more information on how to work with a custom report using the Report Assistant, see Chapter 5 - Charts.

Following is a description of the three Chart Assistant windows.

Chart Assistant - Step 1 Window

This window is used to define specific chart parameters when building your own chart. It displays when you choose the Chart Assistant option on the Research Assistant - Step 3 window or when you click the Chart Assistant button on the Research Insight desktop. You can select the chart style along with how many companies are to appear on the chart. In addition, you can create a chart using the current time period, or you can choose to specify the period of time for an historical analysis chart. Following is a description of each button displayed in this window.

< Back	Returns you to the previous window.
Next >	Opens the Chart Assistant - Step 2 window.

Chart Assistant - Step 2 Window

This window is used to select the broad item groups and specific data items within a group/category that you want to appear on your chart. Following is a description of each button displayed in this window.

	Adds new items chosen from the Look Up List to the Selected Items area.
	Opens the Look Up List where you can search for a specific item to add to your chart.
Customize...	Opens the Customize Item Sets dialog box where you can modify or create new item sets and items.
Add >>	Adds the items selected from the Items list to the Selected Items area.
Add All >	Adds all the items displayed in the Items list to the Selected Items area, which shows all items that will appear on your chart.
Remove <<	Removes any highlighted item(s) from the Selected Items area.
Edit...	Opens the Item Set Definition dialog box, where you can modify the highlighted Selected Item.
Definition...	Opens the Item Definition dialog box where you can view the definition of the highlighted item.
< Back	Returns you to the Chart Assistant - Step 1 window.
Next >	If you are running an historical analysis report, use this button to open the Chart Assistant - Step 3 window.
Finish	If you are running a current time period report, this button opens your completed chart.
Screen Items	Adds the items you used to screen the database to your chart.
Move Up Move Down	Moves the selected item up or down one position in the list; this affects where the item will appear in the chart.

Chart Assistant - Step 3 Window

This window displays after you choose to build a chart based on an historical analysis and select the item categories and specific items within a category that you want to appear on your chart. This window lets you enter the **Beginning** and **Ending** Periods you want to evaluate when you run historical analysis charts.

This window also gives you the option of selecting a Relative, Absolute or Calendar time period for your chart.

The **Relative** time period requires a point of reference in order to determine which time period is being referenced (e.g. the last three years, the most recent four quarters, etc.). This option enables you to rerun your report in subsequent periods without changing the reference. The default Beginning and Ending periods are **0** where **0** represents the most current time period (e.g. annual, quarterly, monthly, etc.) for which data is available. One period prior to the current period is indicated by [-1], two periods prior to the current period is indicated by [-2], etc.

The **Absolute** time period ensures that a specific time period's data is returned (e.g. May01 for May 2001 or Y01 for fiscal year 2001).

The **Calendar** time period is an exact calendar year, quarter, month, week, or day. The calendar time period is always the exact year in which the time period ends. For example, suppose a company's fiscal year-end is May 2001. The calendar time period for annual data is 2001.

If you have selected data items with different periodicities (e.g. annual sales, quarterly EPS), this window will also prompt you to select an alignment for the data.

Following is a description of each button displayed in this window.

< Back	Returns you to the previous window (Chart Assistant - Step 2).
Next >	Displays the Run Assistant window or your completed chart, depending upon from where you accessed the Chart Assistant.

Chart Window

This window displays a chart according to the companies and criteria you established in the Research and Chart Assistants. Under the **File** menu, you can choose to **Close** or **Save** your chart, create a **New** chart or **Open** an existing chart. If you close or save your file, you will be taken out of the Research Assistant. Click the (**Run**) button to access the Run Assistant window where you can modify your screening criteria for a chart. To rerun the chart with different data items, click the (**Rerun Assistant**) button or select Rerun Report/Chart Assistant from the Report menu.

To return to the Research Assistant click the (**Research Assistant**) button on the desktop.

Below is a description of each chart toolbar button.

File Open Window

Click on the folders to display all predefined reports and charts

This window displays when you choose the **Open Report** or **Open Chart** option on the Research Assistant - Step 3 window or when you click the **Open Report** or **Open Chart** button on the Research Insight desktop. From this window you can open pre-defined reports or charts. Following is a description of each button displayed in this window.

Browse...	Allows you to open files residing in other drives.
New Report	Opens the Report Assistant - Step 1 window where you can create your own report.
New Chart	Opens the Chart Assistant - Step 1 window where you can create your own chart.
< Back	Returns you to the previous window.
Finish	Runs and displays the highlighted report or chart.

The Run Assistant

The Run Assistant window automatically opens before a custom report or chart is generated when you do not pre-screen the database with the Research Assistant. The Run Assistant window also displays after you have selected a pre-defined report or chart from the File Open window or when you click (**Run**) to re-run a report or chart.

The Run Assistant does not guide you from one window to another. Instead, it has four stacked tabs in one window, each of which you must click to access. With the Run Assistant, you can create or modify the screening criteria, choose or change the set, modify the time period or view and change the underlying Base Set and Formulas for a report or chart.

Run Assistant - Screen

The Run Assistant - Screen tab allows you to create or modify the database screening criteria for the report or chart you want to run or re-run without using the Research Assistant. This tab contains the same buttons as the Research Assistant - Step 1 window except for the **Next** button. Instead, it contains the **OK** button, which runs the report or chart according to the screening criteria you just defined in the Run Assistant window. See page 13 for a description of the remaining buttons.

Run Assistant - Set

The Run Assistant - Set tab allows you to choose or change the set of companies for the report or chart you want to run or re-run. This tab contains the same buttons as the Research Assistant - Step 2 window except for the **Next** and **Back** buttons. Instead, it contains the **OK** button, which runs the report or chart according to the set you just chose in the Run Assistant window. See page 15 for a description of the remaining buttons.

Run Assistant - Report Time Periods

The Run Assistant - Report Time Periods tab allows you to modify the time period for the report or chart you want to run or re-run. This tab functions like the Step 3 windows of the Report and Chart Assistants. It gives you the option of selecting a Relative, Absolute or Calendar time period for your report or chart.

The **Relative** time period requires a point of reference in order to determine exactly what time period is being referenced (e.g. the last three years, the most recent four quarters, etc.). This option enables you to rerun your report in subsequent periods without changing the reference. One period prior to the current period is indicated by [-1], two periods prior to the current period is indicated by [-2], etc.

The **Absolute** time period ensures that a specific time period's data is returned (e.g. May01 for May 2001 or Y01 for fiscal year 2001).

The **Calendar** time period is an exact calendar year, quarter, month, week or day. The calendar time period is always the exact year in which the time period ends. For example, suppose a company's fiscal year-end is May 2001. The calendar time period for annual data is 2001.

Run Assistant - Screen - Classic View

The Run Assistant - Screen - Classic View tab allows you to view and change the underlying Base Set and Formulas for the report or chart you want to run or re-run. This tab contains the same buttons as the Research Assistant - Step 1 - Classic View window except for the **Next** and **Back** buttons. Instead, it contains the **OK** button, which runs the report or chart according to the Base Set and Formulas you just viewed or defined in the Run Assistant window. See page 14 for a description of the remaining buttons.

The Look Up List

The Look Up List is a Research Insight tool that enables you to look up information about the companies, items, functions and sets included in the database. Like the Run Assistant window, the Look Up List is comprised of four stacked tabs. It displays when you select **Look Up** from the **Tools** menu or whenever you click the (**Look Up**) button.

The **Look Up** button is found throughout Research Insight, and if you access the Look Up List with the button, the contents of the list changes according to where the button is located. For example,

- if you click the Look Up button in the upper right-hand corner of the Research Assistant - Step 2 window, the Look Up List displays with only the Look Up - Companies tab
- if you click the Look Up button on the Initial Set dialog box, the Look Up List displays with only the Look Up - Set tab
- if you click the Look Up button in the upper right-hand corner of the Report Assistant - Step 2 window, the Look Up List displays with the Look Up - Items and the Look Up - Functions tabs
- if you access the Look Up List from the Tools menu with the Look Up button on the Research Insight Desktop or from the Research Assistant Classic View, it displays with all four tabs.

Buttons

All four tabs in the Look Up List contain most of the same buttons. Following is a description of the buttons common to all tabs in the Look Up List.

Paste	Pastes the company, set, item or function into the field from which you accessed the Look Up List.
Copy to Clipboard	Copies the company, set, item or function to your computer's clipboard so you can paste it wherever you want.
Close	Closes the Look Up List.
Help	Displays Help for the window you are in.

Look Up - Companies

To open the Look Up List from the **Tools** menu, select **Look Up**...

The Look Up - Companies tab lists every company and index in the COMPUSTAT (North America) database by tickers and names, and by the set to which they belong. With the Look Up - Companies tab, you can search for a company using the partial or whole name, and you can look up the industry segment information for a company as well. This tab allows you to sort the companies within a set by either ticker symbols or names.

The Look Up - Companies tab contains all the buttons common to the Look Up List (see page 30). In addition, it contains the **Segments** button, which accesses the Segments dialog box so you can view the industry segment information for a company.

Look Up - Items

To open the Look Up List from the **Tools** menu, select **Look Up**...

The Look Up - Items tab lists every data item and concept within the database by category, by name and by mnemonic. With the Look Up - Items tab, you can search within a category for an item using the partial or whole name, and you can look up the data definition for the item as well. This tab allows you to sort the items within a category by either mnemonics or names.

The Look Up - Items tab contains all the buttons common to the Look Up List (see page 30). In addition, it contains the **Definition** button, which accesses the COMPUSTAT (North America) Data Definitions window so you can view the definition of the item.

Look Up - Functions

To open the Look Up List from the **Tools** menu, select **Look Up**...

The Look Up - Functions tab allows you to look up the different categories of functions (pre-defined calculations) within the database. With the Look Up - Functions tab, you can search within a category for a function using the partial or whole name, as well as review the definition for the function.

The Look Up - Functions tab contains all the buttons common to the Look Up List (see page 29). In addition, it contains the **Definition** button, which accesses the COMPUSTAT (North America) Data Definitions window so you can view the definition of the function.

Look Up - Sets

To open the Look Up List from the **Tools** menu, select **Look Up**...

The Look Up - Sets tab lists the sets available in the database. With the Look Up - Sets tab, you can search within a category for a set using the partial or whole name, and you can look up any sets you have stored outside the database on your computer or network.

The Look Up - Sets tab contains all the buttons common to the Look Up List (see page 29). In addition, it contains the **Browse** button, which accesses the Open dialog box so you can view any sets you have stored outside the database and add them to the database, if necessary.