Table of Contents

Chapter 1 - Getting Started 1
Built on the Solid Foundation of COMPUSTAT Data 2
COMPUSTAT Databases 2
Textual Databases 4
Selecting the Default Database 5
Choosing Default Styles.....5
Where to Go When You Have Questions 7
On-Screen Help.....7
Web site.....7
Customer Support 7

Chapter 2 - Navigating Research Insight 9
Welcome to Research Insight Window 10
Research Insight Desktop 11
Research Assistant 12
Research Assistant - Step 1 Window 12
Research Assistant - Step 1 - Classic View Window 14
Research Assistant - Step 2 Window 15
Research Assistant - Step 3 Window 16
Report Assistant.....17
Report Assistant - Step 1 Window.....17
Report Assistant - Step 2 Window.....18
Report Assistant - Step 3 Window.....19
Report Window.....20
Chart Assistant.....21
Chart Assistant - Step 1 Window.....21
Chart Assistant - Step 2 Window.....22
Chart Assistant - Step 3 Window.....23
Chart Window 24

File Open Window 25
Run Assistant 26
Run Assistant - Screen 26
Run Assistant - Set 27
Run Assistant - Report Time Periods 28
Run Assistant - Screen - Classic View 29
Look Up List 30
Buttons.....30
Look Up - Companies 31
Look Up - Items 32
Look Up - Functions 33
Look Up - Sets.....34

Chapter 3 - Screening COMPUSTAT (North America) with the Research Assistant 35
Defining Screening Criteria and Viewing the Results of a Screen.....36
Changing Your Initial Set and Defining Multiple Criteria and Ranges 38
Customizing Screening Criteria 40
Accessing the Classic View of a Screen 42
Exercises 44

Chapter 4 - Reports 49
Running a Company Highlights Report 50
Running a Pre-defined Report 51
Running a Pre-defined Report on Multiple Companies.....52
Modifying a Pre-defined Report.....53
Creating a Table Report 54
Sorting Columns in a Table Report 56
Creating an Historical Analysis Table Report.....57
Selecting Time Periods 58
Creating a Free-Form Report.....58
Exercises 61

Chapter 5 - Charts 69
Using Pre-defined Charts.....70
Running a Pre-defined Chart for Multiple Companies.....72
Modifying a Pre-defined Chart.....73
Creating Your Own Charts 74

Chapter 6 - Customizing 77
Choosing or Changing Styles 78
Customizing Indicators and Item Sets.....79
Importing/Exporting 81
Modifying Report Settings 82

Modifying Adjustment Factors 83
Modifying Data Code Settings 84
Modifying Current Period Cutoffs 84
Modifying Your Default Base Set 84

Chapter 7 - Using Formulas and Functions.....85
Formulas in Research Insight 86
Formula Components.....86
Functions 86
Items 87
Company References 87
Sets 87
Time Period References 88
Concepts 88
Formula Operators 89
Parentheses.....89
Using Parentheses ( ), Brackets [ ], and Braces { }.....89
Mathematical and Relational Operators 90
Adding “Wildcards” to Your Formula 90
Functions in Research Insight 91
The Parts of a Function 91
Currency Functions 91
Growth Functions.....92
Historical Analysis Functions.....93
Information Functions 93
Logical Functions.....94
Mathematical Functions.....94
Period Reference Functions 95
Reference Functions 95
Screening Functions 96
Set Analysis Functions 97
Statistical Functions.....98
Text Functions 98
Database Control Functions 99

Chapter 8 - Current and Historical Data.....101
Annual Periodicity.....102
Fiscal Year Data.....102
Calendar Year Data 102
Quarterly Periodicity.....103
Fiscal Quarter Data 103
Monthly Periodicity 103
Daily Periodicity 103

Scalar Periodicity 103
The Current Period.....104
Time Period References.....106
Absolute Time Period References 106
Relative Time Period References 107
Calendar Time Period References.....108
Using Calendar Quarters to Align Different Fiscal Periods 109
Using Period Reference Functions to Align Items to Different Periodicities 110

Chapter 9 - Library 111
Accessing Business Descriptions Through Research Insight 112
Batch Printing Business Descriptions 113
Accessing Trends & Projections Through Research Insight 114
Accessing Country Overviews Through Research Insight.....115
Viewing Textual Data From an Open Set 116

Chapter 10 - Using Standard and Poor's Research Insight with Excel.....119
Using a Research Insight Set to Create an Excel Spreadsheet 120
Opening a Research Insight Report as an Excel Spreadsheet.....123
Using Excel and the Report Assistant to Create a Spreadsheet.....125
Opening an Excel Template 127
Open a Research Insight Chart in an Excel Spreadsheet.....128
Using Excel and the Chart Assistant to Create a Chart 130
Advanced Active-X Technology Capabilities in Excel 133

Chapter 11 - Importing and Downloading 135
Using the Task Scheduler 136
Scheduling an Import 136
Changing the Import Schedule 139
Scheduling an Internet Download 140
Establishing Your Internet Settings 142
Changing the Internet Download Schedule.....142
Suspending a Scheduled Task 143
Deleting a Scheduled Task 143
Viewing Import and Download Results 144
Importing Your Own Data Into Research Insight 145
Creating Your Spreadsheet 145
Retrieval Keys 145
Mnemonics 145
Saving Your File 145
Importing Your Data 146
Importing Sets Into Research Insight.....147
Creating Your Spreadsheet 147

Importing Your Set 147
Importing Concepts Into Research Insight.....149

Chapter 12 - COMPUSTAT (Global) Data 151
Changing Your Default Database.....152
Content Unique to the Global Database 153

Glossary 155

Index 157