



# FactSet Web Outline

## What is FactSet?

FactSet is a research tool that integrates comprehensive data and content with dynamic analytic tools in an easy-to-use and fully customizable platform.



## What are FactSet's Key Advantages?

Professionals at corporations use FactSet to research comparable companies, manage business development, make contacts, and generate new opportunities.

User FactSet allows you to:

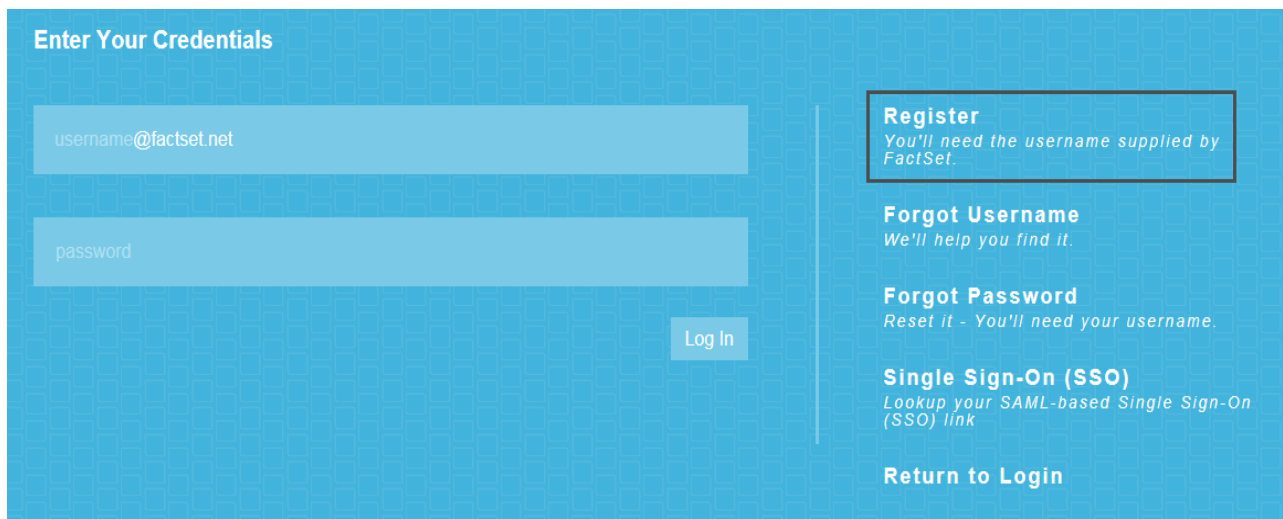
- + Monitor the markets from your desk or on the go so that you never miss a detail regarding your comps or your industry
- + Gain in-depth company insight with comprehensive analytics and global data including reports to evaluate metrics across a group of peer companies
- + Gain insight into current and potential investors with global share ownership information for institutions, mutual funds, and insiders/stakeholders

## What is FactSet Web?

FactSet Web is a way for you to securely access FactSet from a web browser – from any machine, anywhere. All online functionality is available, including the ability to download reports. FactSet office links will not be available through the web based platform.

### *FactSet Connect Setup and Logon Instructions*

1. On your PC, open a browser and point to <https://my.factset.com>.
2. When prompted, enter your FactSet.net ID and create a password to register.

The image shows a web interface for logging into FactSet. On the left, under the heading "Enter Your Credentials", there are two input fields: the top one contains the placeholder text "username@factset.net" and the bottom one contains "password". To the right of these fields is a "Log In" button. On the right side of the interface, there are four links: "Register" (with a subtext "You'll need the username supplied by FactSet."), "Forgot Username" (with a subtext "We'll help you find it."), "Forgot Password" (with a subtext "Reset it - You'll need your username."), and "Single Sign-On (SSO)" (with a subtext "Lookup your SAML-based Single Sign-On (SSO) link"). At the bottom right is a link for "Return to Login".

**Enter Your Credentials**

username@factset.net

password

Log In

**Register**  
*You'll need the username supplied by FactSet.*

**Forgot Username**  
*We'll help you find it.*

**Forgot Password**  
*Reset it - You'll need your username.*

**Single Sign-On (SSO)**  
*Lookup your SAML-based Single Sign-On (SSO) link*

**Return to Login**

**Free 24 hour product support:**

[support@factset.com](mailto:support@factset.com)

1800 33 28 33

## Exploring FactSet

### Review General Navigation Features


Customizing the workspace to mirror your daily workflow

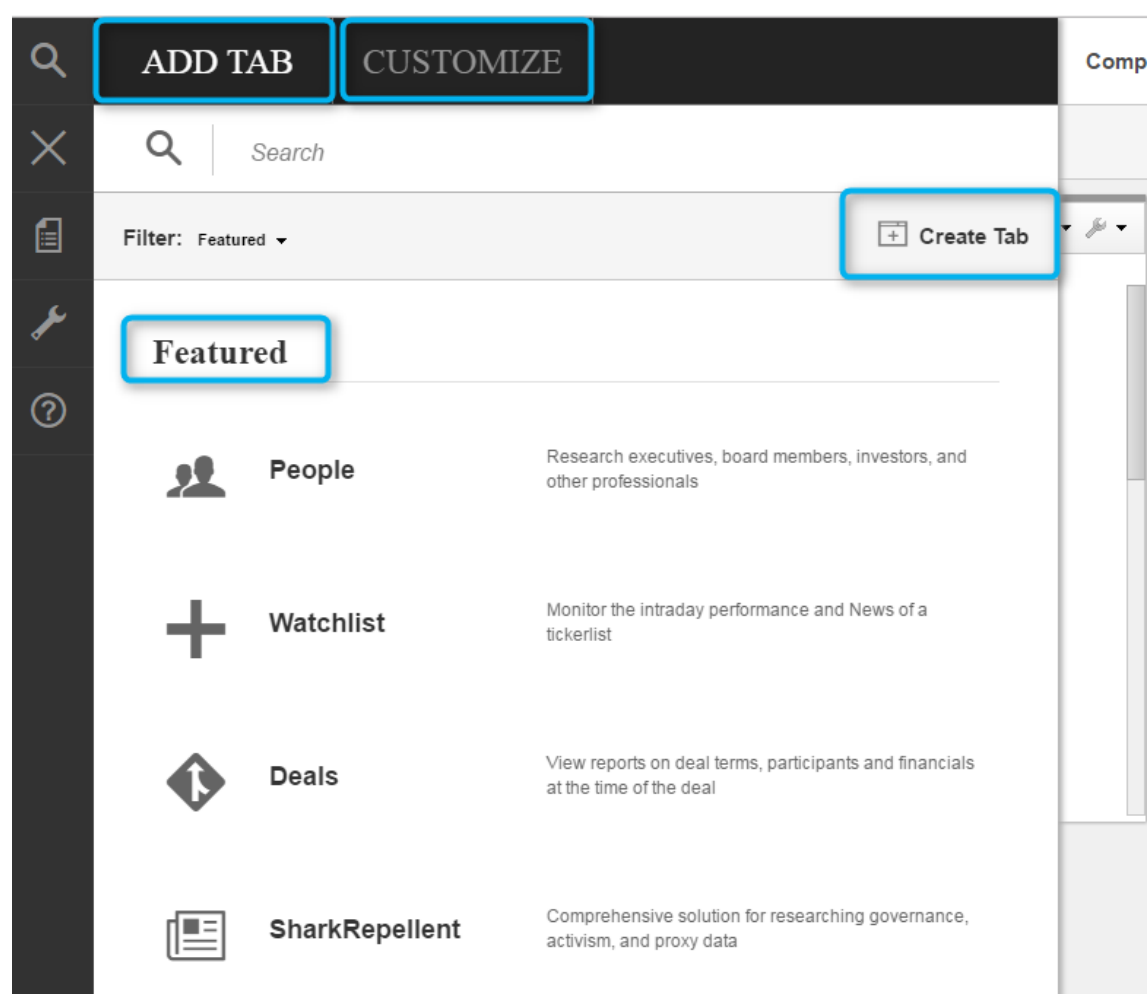
- + Enter a ticker or company name through the magnifying glass. The entry box uses intelligent type ahead searching making searching for securities easier and faster. Whether you are searching for equities or indices, a list of matching items pops up below and takes advantage of rules-based searching giving you the most relevant matches

The screenshot displays the FactSet application interface. At the top, a search bar contains the text "BHP EBITDA" and a placeholder "TYPE HERE". Below the search bar, there are tabs for "All", "Equities", and "Private". The main content area shows the search results for "BHP Billiton Limited (BHP-AU)". The results include a bar chart showing EBITDA (LTM Semi) for the years '12, '13, '14, and '15. The chart shows values of approximately 25, 20, 25, and 15 respectively. Below the chart, there is a table of related items:

Item	Application
Company/Security - Income Statement	@IS
Company/Security - Estimate Summary	@ESM
Company/Security - All Estimates	@EST
Company/Security - Financial Key Items	@KEY

## Navigating Tab Structure and Toolbar Options

- + To add a new tab, click on the Plus icon 
- + Insert a 'Featured' FactSet premade tab
  - + If you close a tab currently in your workspace, return to this plus icon to retrieve the information.
- + Add sub tabs to existing tabs by clicking on 'Customize'



- + Click 'Create Tab', and create sub-tabs e.g. Global Markets, US Indices, Commodities etc.

- + Save several peer lists of clients, indices or competitor by clicking on the document icon.

## Online Assistant

### Search Online Assistant

Use Online Assistant to research database coverage information in addition to detailed information on navigating reports, number calculations, and how-tos on any FactSet database, product or report. (Online Assistant p. 1976)

Practice: How much history does FactSet offer for estimates and how often are the estimates updated?

- Click the question mark icon to launch Online Assistant
- Search for “FactSet Estimates”
- Read FactSet Estimates Database Features > History
  - ☐ FactSet Estimates go back to 1999 for U.S., Canada, and Asia/Pacific and 1997 for Europe
- Use the right pane to view related estimate pages. Select Real Time Updates
  - ☐ FactSet Estimates is updated real-time throughout the day. See Online Assistant p. 13344 for additional details.

**Online Assistant**

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- Fixed Income >
- Charting >

### FactSet Online Assistant Page 1

Welcome to FactSet Online Assistant, FactSet's comprehensive help site! Use Online Assistant to find help on FactSet products, leaf databases available.

**Product Help**

Expand each category in the left pane to view product documentation; access links to related information, calculations, and report methodology; and find answers to frequently asked questions.

**Tipsheets**

Visit the [Tipsheets](#) page to launch downloadable PDF documents, which provide a quick, instructional guide for getting started in a FactSet application. Tipsheets are organized by category.

# FACTSET Getting Started in Filings 2.0

Filings 2.0 is a fast and intuitive application on FactSet that allows you to quickly find and analyze company filings. It also goes further - providing you with the tools you need to enhance your company analysis, making it easier to evaluate the subtleties of earnings guidance, management direction, compensation, and more. Visit Filings 2.0 when financials are simply not enough, and you want to study and understand the text behind the numbers.

See which filings arrived today by selecting the drop-down menu next to the Identifier box and selecting the "ALL COMPANIES" option.

Narrow your search by selecting one of the filing groups in the left-pane sidebar. Filing groups cut across all global regulatory feeds.

Click on any headline to launch the filing in Document Viewer. Hover over filing headlines to view full document titles.

Compare any two EDGAR filings using FactSet's Blackline Now option by selecting the check box next to two filing headlines and clicking the **Blackline Now** button in the main toolbar.

Subscribe to Notify's "Company Analytics" category to stay informed on the latest updates to company filings on FactSet.

Perform text searches using Boolean syntax with keywords in context and click the **Go** button. Click the **Info** icon to find examples of operators to help make your queries easy and precise.

E-mail, print multiple documents at once, and download documents to Microsoft Word, PDF, and HTML.

Click the **Wizard** button to download as-presented financials into Microsoft Excel.

Click the **Blackline** icon to view an already processed Blackline report for a company's 10-K or 10-Q filings.

FactSet Blackline reports highlight text that has been changed, added, or deleted from the last period's filing. For more information on FactSet Blackline reports, see Online Assistant page 14503.

The screenshot displays the FactSet Filings 2.0 application. The top section shows a search bar with "GOOG-US" entered and a "Go" button. Below the search bar is a table of filings for Google Inc. (GOOG-US). The table has columns for Form, Headline, Date, Size, Source, Lang, and View. The "10-Q" filing for the period ending 30-Sep-13 is highlighted. To the left of the table is a sidebar with various filing groups like "All Filings", "Annuals", "Interims", etc. Below the table, there is a "Blackline Now" button. The bottom section of the screenshot shows a detailed Blackline report for the 10-Q filings, comparing the 30 Sep 13 10-Q and the 30 Jun 13 10-Q. The report highlights changes in text, such as "1. Financial Statements" and "2. Disclosures about Market Risk".

Where can I find this on FactSet?

FactSet Insert menu > Company > Filings > Filings 2.0

Online Assistant Page ID

14009



# FACTSET Screening for Ideas

Idea Screening 2.0 provides a workflow-driven, customizable application that allows you to screen for potential investment opportunities, find potential buyers, track trends, and identify precedent transactions. For a guided tour of Idea Screening, launch the eLearning series on Online Assistant page 17315. To access supplemental training material, see Online Assistant page 17438.

Click the **Adjust Logic** button to change the screening logic or view counts for your screening parameters.

Click the **View Results** button to analyze results based on your screen's criteria.

Choose the **New Screen** tab to open saved screens or to create a new screen for Companies, M&A, PE/VC, Private Placements, or Public Equity Offerings.

Choose to screen for transactions or specific buyers, then display results in league tables or volume totals.

Search for keywords or filter results based on favorites or recommended items.

Add parameters by dragging from the left pane. Hover your mouse over the **Information** icon to view an item's definition. For more information on working with your screen parameters, see Online Assistant page 16697.

Read the latest updates to Idea Screening in the "Screening" category of FactSet Notify. Click the category's envelope icon to receive email alerts.

Use Idea Screening's save features to save the screening parameters, the report results, or the list of passing identifiers for use in other FactSet applications.

Click the **Find** button to search your results for a specific company, then click the name to jump to the passing transaction.

The screenshot displays the Idea Screening 2.0 (eISC2) application interface. The top navigation bar includes buttons for 'Generate Comps', 'Companies Seeking Early...', 'Global Priced IPO Volume...', and 'M&A Volume Total - YTD...'. Below this is a 'View:' dropdown set to 'League Table', and buttons for 'Edit Screen', 'Adjust Logic', and 'Edit Report'. The left pane contains a 'Search Items' section with a search bar and a list of parameters including 'Altitude', 'Synopsis', '% of Target Shares Sought', '% of Target Shares Owned', 'Deal Lookup/ID', 'Date (5)', 'Announcement Date', 'Rumor Date', 'Completion Date', 'Expected Completion Date', 'Withdrawn Date', 'Value (3)', 'Base Equity Value', 'Total Invested Capital', 'Enterprise Value', 'Transaction Value', and 'Unofficial Price'. The right pane shows the 'Announcement Date' (01/01/2014 to MM/DD/YYYY), 'Transaction Status' (Canceled, Complete, Pending, Rumor, Rumor Cancelled), 'Completion Date' (The date the parties involved in the transaction disclosed that it become effective. See also: Transaction Status, Expected Completion Date Item id (for internal user): 2556), and 'Acquirer Sector/Industry' (Acquirer, Primary). The bottom pane displays a table of results with columns: Target Company Name, Target FactSet Industry, Acquirer Co., Acquirer, Transaction Date, Transaction Value, and Transaction Type. The table lists transactions such as 'Time Warner Cable, Inc.', 'Perrini Laboratories, Inc.', 'WhatsApp, Inc.', 'Societe Francaise de Radiotelephonie SA', 'Beam, Inc.', 'Societe Francaise de Radiotelephonie SA', 'SCANIA AB', 'Ziggo NV', and 'Essex Energy Plc'. The bottom status bar indicates '1 - 50 of 143 Transactions' and 'Page 1 of 3'.

Where can I find this on FactSet?

FactSet Insert menu > Screening/Report Writing > Idea Screening 2.0 (@ISC2)

Online Assistant Page ID

16590

