

Welcome to **MarketScreen from Money.net**, your access to fundamental data along with source SEC filings, pricing histories, earnings estimates, screening and analyst recommendations powered by EDGAR Online, Inc. We've created this user guide to facilitate your use of this service.

To begin, point your browser to: http://www.marketscreen.com/

## **Login Page**

Enter the Username and Password you received via email from **MarketScreen**. Note: If you've misplaced your login identifiers, click the <u>Forgot your password</u>? link on the login screen.

TIP: For your convenience, your Username and Password will be saved by default and you will not be prompted to login again unless you manually click the logout link.



#### **Navigation**

There is one main navigation bar consisting of **Tabs** at the top of every page that enable you to quickly navigate through the product areas

The **Tabs** represent the following:

- Dashboard Personalize, customize and consolidate the companies and data you are most interested in on this page.
- Today Quick access to the most recent SEC filings and company data of significance.
- Company Drill down into specific company details including standardized financial data, significant SEC filings, ownership data and company people.
- Industry Browse sector industry groups to find peers that fit your investing or financial models.
- Search Search SEC filings using full text search, segment by market and time period, or restrict your search to specific filing sections.
- Screener Find companies that meet your investment criteria with the Screener.

## **QUICK START GUIDE**

Analytics – I•Metrix Professional, from EDGAR
 Online, represents a revolutionary advance in the
 speed, accuracy, cost and convenience of retrieving
 and analyzing the most detailed financial data.

## **Quick Search**

With the **Quick Search** users can easily get to the company overview by entering the ticker symbol. Use the magnifying glass for more search options.



**TIP:** Don't know the ticker? Enter the company name and results matching your request will be returned instantly.



## **Dashboard**

When you log in or click the **Dashboard** tab you'll initially see a page with Today's Filings as the default view. The filings are grouped by filing type.

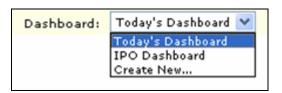


 Clicking anywhere in the row will bring you to a page giving more information on the filing and viewing options.



- Click on the icons to the left to view the filing in HTML, Word, PDF, Excel or the original format.
- Clicking on the Company name will bring you to all of the company's filings.
- Clicking on Folders enables you to quickly access links to filings you frequently use or that you need to access from multiple locations (branch office, main office, client site, home office).
- The Alerts icon will set up an Alert for that Company and Form Type. An Alert allows you to follow companies by receiving notice via email or pop-up window when a filing meeting your criteria has been submitted.
  - The buttons will move or close the window with the filings.

Use the Dashboard drop down menu to move between different dashboards. MarketScreen already has two dashboards set up: Today's Dashboard and IPO Dashboard.



To customize your dashboard, select either: **Add Content** or **Create New** from the **Dashboard** drop down.



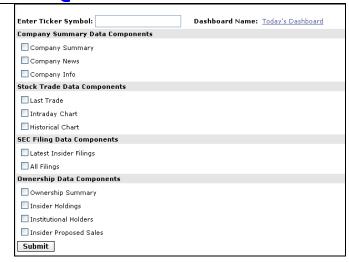
You can add up to 10 customized content areas to a single dashboard by clicking on the **Add Content** button.

You can remove existing content from your dashboard by clicking the button located in each content area of your dashboard.

You can choose to add Company Summary Data Components, Stock Trade Data Components, SEC Filing Data Components and Ownership Data Components to your dashboard. You can save up to 10 different dashboards.

Just click on the items you want displayed on the **Add Content** page:

## **QUICK START GUIDE**



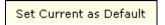
The **Add Content** page can also be reached through the **Preferences** link at the top of every page.

Dashboards can be shared with your colleagues in read only mode.

Click on the **Share** link and you will be prompted for a list of email addresses to send the link to your dashboard.



Use the Set Current as Default link to select the dashboard you would like to appear every time you login to MarketScreen or select the dashboard tab.



#### **Today**



The Today tab provides quick access to the most recent SEC filings and company data of significance.



The day's filings are listed with the most recently received filing appearing at the top of the list.



Dashboard Today Co Today's SEC Filing Activity All Filings Annual Reports Quarterly Reports **Proxy Statements** Current Event (8-K) Filings **Mutual Fund Filings** IPO Filings Today's Topic Activity Earnings Charge Forward & Options Contract General Agreements In Bankruptcy Increase Staffing Inquiry Initiated Legal Action Legal Impacts Disclosure Legal Settlement Merger Completed Stock Related Acquisition Today's IPO Activity IPO Summan IPO Performance IPO News

The menu bar on the left side of the Today page allows you to locate specific filing types, topic activity, IPO and SPO activity.

## **Company**

Today's Secondary Activity

Secondary Summary

The **Company** tab allows you to drill down into specific company details including standardized financial data, significant SEC filings, ownership data and company people.



Simply enter in the company's ticker symbol or name to get the complete overview.

The current market information and key financial indicators are provided at the top of the page. The main company page also gives you the last 10 SEC filings, a summary of ownership information and current news. Use the left hand navigation bar to drill down further into company information including quick links to Sox Compliance information and the last MD&A.

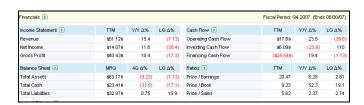
## **QUICK START GUIDE**



The left hand navigation bar in the company section provides quick links to the latest information on a company.

## **Company Financials**

See key metrics at a glance. Click on the green arrows on the company page or use the links on the left hand navigation to see the company's data in XBRL on the web.





#### MICROSOFT CORP (MSFT) Summary 🔍 Quarterly Income Statement 🔍 Annual Income Statement Compare to Period Latest FQ Fiscal Year 2007 Fiscal Quarter 4th Qtr 6/30/2007 Quarter Ending [Footnotes] Revenue \$51,122,000 Cost of Goods and Services Sold Cost of Goods Sold. · Cost of Goods Sold \$10,693,000 · Cost of Goods and Services Sold \$10,693,000 \$40,429,000 Gross Profit

MarketScreen provides two views into a company's financial data: Snapshot and Summary.



**Snapshot** is a quick 30,000 foot overview of the company's financial picture. The **summary** view contains more standardized data points along with some company specific information. Use the drop down menu at the top of the page to switch views.

Use the **Footnotes** link at the top of the financials to get to the notes for that filing. **Right click** on a cell to **verify the source** or see if there are any **related notes** for that line item.

#### **Industry**



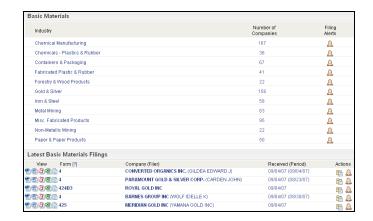
The Industry tab allows you to browse sector industry groups to find peers that fit your investing or financial models.

The Industry tab features a left hand navigation bar that lists different sectors.

## **QUICK START GUIDE**



The Basic Materials Sector is the default setting and will appear when you click on the Industry tab.



Each sector is broken down into industries that fall within that sector. To the right of the industry are the Number of Companies within that industry.

Under the list of Industries are the latest filings for that particular sector. Click on the icons to the left to see the filing. Clicking on the company name will bring you to the company overview page. You can also place the filing into a folder or set up an alert using the icons to the right of the listing.

On the far right side of the Sector page, **Filing Alerts** gives one click access to setting up an Alert for that industry that will let you know when any filings are submitted by any company within that industry.

Clicking on the bell icon under **Filing Alerts** brings up the **Add Alert** window that will be set up for the Industry Alert.





Simply name the Alert, decide how you would like to be notified of a new filing – either via email or a popup window and click on **Add** and the Alert is set up.

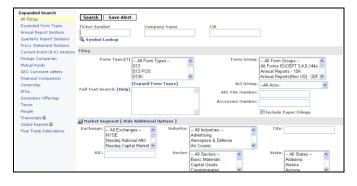
Clicking on any industry from the sector page will bring you to a list of the companies that fall within that industry. This page also provides the latest filing date and quick access to the company page.



#### Search

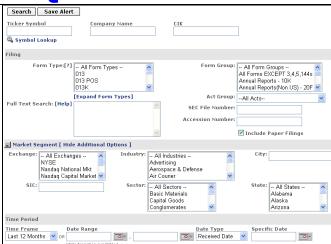


The **Search** tab allows users to search SEC filings using full text search, segment by market and time period, or restrict your search to specific filing sections.



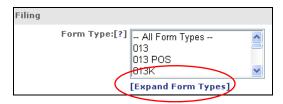
The default search screen is the **All Filings** search:

# **QUICK START GUIDE**

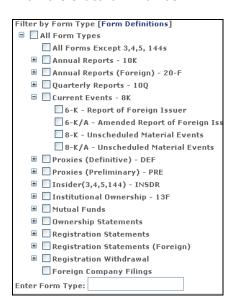


Enter the ticker, company name or CIK and select any filters and time period for your search and click search.

You can also search by form types, text search, SEC file number, accession number or Act group without specifying a particular company.



Clicking on the **Expand Form Types** link under the **Form Types** box will open a tree structure to help you locate the exact document needed without having to know the exact form number.



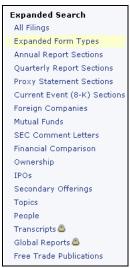
Clicking on **Save Alert** on the Search screen will create an Alert.





To search by a particular market segment, click on the **Market Segment** icon.





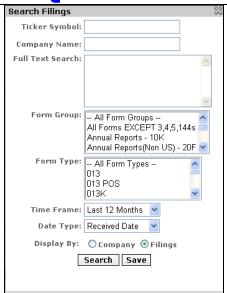
On the left hand side of the search page are links to different options to help you quickly find the documents and information you need.

Use the **Quick Search** feature at the top of every page to get the company information you want guickly.



The magnifying glass will enable you to search for filings fitting your criteria.

## **QUICK START GUIDE**



#### **Search Results**

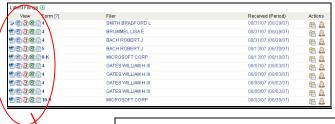
Search Results are displayed with the most recent filings appearing at the top of the list. The left hand menu bar provides links to other company information, including access to the MD&A sections of recent filings, financial data, current stock pricing and ownership information, giving you all the information you need on one page. At the top of the page are the options to Add the filings for the company that was searched to your Dashboard and create a Filings Alert for that company.





# **QUICK START GUIDE**

## Example of a filings search result screen:





**TIP:** Use the icons next to the form types to view the filing in HTML, Word, Adobe PDF, Excel or HTML.



**TIP:** Use the "Back to Search Results" link when viewing documents instead of your browser toolbar – this will place a checkmark on items already viewed, otherwise, hit "refresh" to see indicators for the items you've looked at.

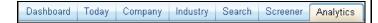
#### **Screener**



The **Screener** is an advanced analytical tool that allows you to filter through thousands of companies and find the few that meet the financial criteria you want in a matter of seconds. No more scouring of individual documents or spreadsheets.

See the Screener Quick Start Guide for step by step instructions on the Screener. http://help.edgar-online.com/screener/screener.asp?site=marketscreen

## **Analytics**



The **Analytics Tab** previews EDGAR Online's I•Metrix Professional suite of data and analysis tools. I•Metrix Professional delivers an unprecedented depth of company and business information more quickly and accurately than any other source into Microsoft Excel.

I•Metrix Professional also offers advanced screening capabilities and more data views - in addition to summary and snapshot it includes as-reported, standardized and, IF purchased separately, views of Chinese XBRL data.

#### **Other Options**



At the top right side of every screen is another menu bar.

**My Alerts** – manage your alerts and add new alerts from this screen.

**Preferences** presents a personalized screen of your **Site Preferences** - saved dashboards, alerts, folders, and the default search and display settings which will be used to pre-populate your home page with filings.

**Personal Preferences** – updating your Personal Information, managing email addresses and changing your password are also located in the preferences section.





# Site Preferences Manage Dashboards Manage Alerts Email Alert History Manage Folders Default Search Settings Default Display Preferences Personal Preferences Update Personal Info Manage Email Addresses Email Preferences Change Your Password

**Help** is context sensitive and will provide instruction on how to navigate and utilize whichever MarketScreen screen you are on.

**Contact Us** links to Money.net's contact information and a form that will enable you to be contacted by a Sales Representative.

**Logout** logs you out of MarketScreen and prevents unauthorized use.

## **QUICK START GUIDE**

#### FAO's

Q: Where can I find Global Reports and Transcripts?

A: Global Reports and Transcripts are now located from the Search Tab on the left hand Expanded Search menu. Global Reports and Transcripts can also be found on the company page on the left hand navigation menu.





Q: Where is the IPO and SPO information?

A: IPO and SPO information is now located under the Today tab, on the left hand navigation bar.

The **IPO Summary** link will provide the information

that formerly was under the IPO tab. You can also search for specific IPOs/SPOs using the **Expanded Search** menu. There is also an **IPO Dashboard** set up that can be accessed from the Dashboards page using the drop down menu.





O: How do I find ownership information?

A: You can find ownership information using the Search tab and selecting Ownership under the Expanded Search menu. Or, you can use the Company Search at the top of the page and the Ownership Information will be located towards the bottom of the Company Profile that is returned from this search option.





Q: <u>How do I download or print more than one file at a time?</u> (Mass download/print)

From either the **Today** page or from a **Search** results screen, to the right of the Received column is a new option – **Download/Print** with a check box next to each filing.

# **QUICK START GUIDE**



Click on the boxes next to the filings you would like to print or download.



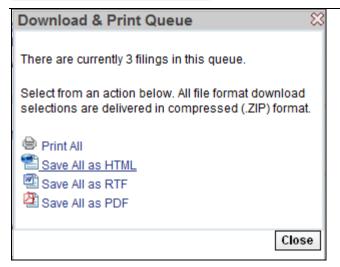
The Download/Print header changes to Process Queue and next to each box that is checked "Queued" appears letting you know what items have been selected. There is also a Process Queue option at the bottom of the screen.

#### TIP:

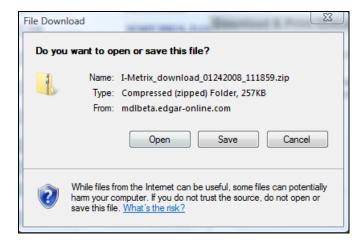
You can download as many filings as appear on one screen – up to 50 at a time. If you return less than 50 results at a time and would like to see more, go to **Preferences** > **Default Search Settings** to change the number of results returned to the number per page you would like to see (10 - 50)

When you have selected the documents you'd like to download or print, click on the Process Queue link. This will bring up the Download & Print Queue dialog box:

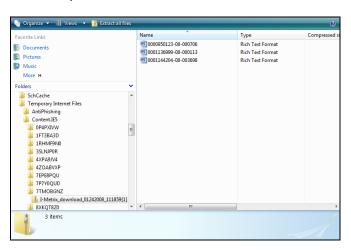




Choose to print all the documents or save all the documents. You can save the documents as web pages, RTF (rich-text format – Microsoft Word) or as PDFs. If you choose to save the documents a file download dialog box will open, prompting you to open or save the file.

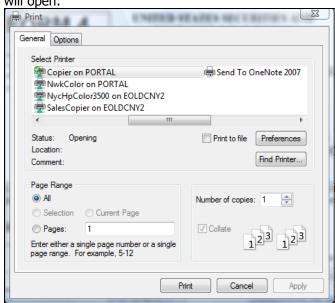


If you click save, a window will open for you to select where on your hard drive to save the documents.



# **QUICK START GUIDE**

If you choose to print the documents, a print dialog box will open:



Select your print settings and click print to send the documents to the printer.