



USING MERGENT ONLINE

Logging onto Mergent Online

- Go to the Type the library's webpage at <http://www.lec.edu/library>. Click on the *Select Subject* drop down box (found under Internet Research and Web Sites) and click on **Business & Economics**. Click on the **Mergent Online** link, or type in the URL: <http://www.mergentonline.com>.
- Click on **ENTER MERGENT ONLINE**.
- Under **Login**, enter your **User Name and Password**. Call the library for user name and password information.
- Click on **Login**.

Basic Search (Company or Codes)

- **Option #1: Identifier**
 - Define the basic search by entering the **Company Name, Ticker Symbol or CUSIP (unique securities ID)**. Click on the appropriate button next to the identifier to run that type of search.
- **Option #2: Classification**
 - Define the basic search by entering the **SIC, NAICS, or MIC (Mergent Identifier)**. Click on the appropriate button next to each classification to run that type of search.
- You may also choose to search a **particular Index** (S & P 500 or NYSE, for example) or restrict to a particular country. Use the pull down menus to restrict your search to these options.
- Click on **Search**.
- Click on the company for which you are searching.

Elements of the Search Results:

--Available Tabs (click on each tab to see the detail):

- **Company Details:** Includes Highlights, History, Joint Ventures, Business, Properties, Subsidiaries, Long Term Debt, Executives and Capital Stock.
- **Company Financials:** Includes Segments, Prelims, Generated, Restated, Ratios, and Analysis
- **Create Reports:** Includes Custom Reporting (ability to choose specific criteria), Predefined Reports (such as Full Company or Financial Overview) and Comparison Reports (such as Compare Company Against Industry).
- **EDGAR:** Offers downloads or printing of filings from the past 90 days for the selected company.
- **News:** Offers brief, recent selected news articles about the selected company.
- **Tear Sheets:** Mergent Factsheets. Summary/chart from the Mergent Publications.

To Search EDGAR

- Click on the **EDGAR Search Tab**.
- Choose to search by **Company Name or Ticker, Central Index Key, Text Search, Filing Date or Filing Type**.
- When all desired criteria are chosen, click on **Search**.
- The results screen will display options for printing and downloading.

Advanced Searching

- Click on the **Advanced Search** option.
- Define the advanced search by selecting the operator(s) and entering an appropriate value(s). You can choose from the following:
 - **Select Target Universe**
 - **Select a Data Category** (such as financials, industry codes, NAICS Code, etc.)
 - **Search Value** (greater than, equal to, code numbers, etc.)
 - **Select Year** (optional and sometimes unavailable depending on the search)
 - When all information desired is selected from box #2, click on **Add**
 - **Search Criteria** (choose edit, remove or new search)
- When all of the above have been selected, click on **Run Search**. A list of companies (or a single company) will be displayed.

Creating a Report from the Advanced Search Result

- Perform the advanced search as outlined above.
- Download the desired companies to the **Company Analysis List** by checking the box(es) for each individual company under **Results**. When you have selected all the desired companies, click where it states "**Click [here] to add the currently selected companies.**" To add ALL the companies, click the option that states "**Click [here] to add all the companies from this search.**"
- Under the green bar at the top right corner of the search screen, click on **Expand** next to the **Company Analysis List**. The chosen companies should be listed below.
- Choose to create a **Comparison Report** (to compare different aspects of the companies to each other) or a **Multiple Company Report** (which can create reports in HTML, PDF, Excel or Word.)
- Select the various categories to be listed in the report. For example, select *Profitability Ratios* as a **Category** and *ROA* as a **Subcategory**. Then select **Add Report Item**.
- When all items have been selected, click on **Create Report** to generate the report.
- To download or print, follow the instructions on the screen. Most reports can be saved as an Excel spreadsheet.

Downloading/Printing

Once you have obtained the report or information you wish to save, you will be given the option of downloading into an Excel spreadsheet, PDF or printing. If the option is NOT given, then you simply select **File** and **Print** from your browser menu.

WHEN TO USE INFOTRAC'S BUSINESS AND COMPANY RESOURCE CENTER

- Quick information on a company
- News or magazine articles
- Subject searching for articles on a particular topic
- Industry news

WHEN TO USE MERGENT ONLINE

- In depth information on a company
- Building reports
- Peer group analysis
- Current/quick ratios
- Company comparisons

Sample Search

You need to compare companies in the hospital industry. Conduct an **Advanced Search** using the **NAICS Code 622110** for **Hospitals**. Click on the **Category** of **Industry Codes** and **Subcategory** of **Primary NAICS**. Type in the **Search Value of 622110** and select **Add**. Click on **Run Search**. The first company displayed should be *Altus Healthcare, Inc.*