

DatAnalysis

Searching and Reporting Guide

Search on a Single Company

1. Enter the company's three letter ASX Code or part of the company name in the box at top of the screen.
2. Choose the required company from the list of options which match your entry.
3. Once in the company report, the tabs contain links to separate content sections. Click on the desired tab to take you to the appropriate section of the report.

Search Across Companies

Three search tools are provided.

1. Quick Search Tool

The Quick Search Tool has two easy steps:

Step A: Search Scope (optional)

The search scope defaults to listed companies only.

However, it is possible to limit or expand your search by any of the following;

- ▶ A specific company or companies. Simply enter the ASX code/codes in the box provided (use the Code Look Up feature if you don't know the code).
- ▶ All companies – listed and delisted, or delisted only (select from the drop down menu).
- ▶ Global Industry Classification Standard (GICS) sector (tick to select required industry sector).

Step B

i) 'Select Section'. Search the entire database (excluding the image signal announcements) or select a particular section from the drop down menu. The default is 'All' i.e. the entire database.

ii) In 'Search Criteria', enter a keyword or phrase (text only). Use the 'Search Help' link on the top right of screen for assistance on creating a search using Boolean logic.

iii) Click 'Run Query'. The search results page returns the companies that match the search criteria. Click on the company name to be taken to the corporate details section of the relevant company or click on the section name to be taken to that section, where your search terms will be highlighted.

Searching the Signal G announcements is available in the Quick Search Tool **only**, not the Advanced Search Tool.

2. Advanced Search Tool

The Advanced Search Tool has three steps:

Step A: Search Scope (optional)

See instructions for Quick Search Tool Step A.

Step B: Select Search Criteria

The 'List of Search Fields' link (located below the Select Subsection box) provides a full list of the sections and subsections available. This will help you better locate the data you are looking for.

i) 'Select Section' of report from drop-down list.

ii) 'Select Subsection' from drop-down list.

iii) 'Select Option' from drop-down list. The options provided will change according to the characteristic of the subsection chosen (i.e. whether data is text, numeric or a date).

iv) 'Select Term/s or Value', enter a keyword or phrase or numeric value. A drop-down list of terms is provided for some subsections. Use the 'Search Help' link on the top right of screen for assistance in refining your search.

v) Click 'Add Query'. Your search criteria will then be added to the 'Query List' box. If you wish to add to your search criteria, simply repeat these steps. You can edit at any time by highlighting and then deleting or editing search criteria.

Step C – Run Query

The search results page returns a list of the companies that match the search criteria. Click on the company name to be taken to the corporate details section of the relevant company or click on the section name to be taken to that section, where your search terms will be highlighted. Click on the 'Back' link if you wish to edit your search criteria and re-run the search.

Saving Search Queries

To save a query, click 'Save query' then enter a name for the query in the 'Prompt' box. To retrieve a saved query, simply select the query from the drop down list provided. N.B. Saved queries will not function when *Step A* options are modified.

3. Imagesignal Documents Search Tool

This tool provides access to all announcements lodged at the ASX from 1 Sept 1998. They are in PDF format. The Search Scope defaults to include all companies (both listed and delisted) and all announcements. However, it is possible to limit your search by choosing:

- ▶ A specific company or companies. Simply enter the ASX code/codes in the box provided (use the Code Lookup feature if you don't know the code).
- ▶ A particular Announcement Type and/or Sub-Type (select from drop-down list)
- ▶ A specific Date Range
- ▶ Specific GICS Sectors (left navigation bar)

- ▶ A keyword in the announcement title (this will search the title only not the whole content).

Refine Your Search Expression

Use *Search Operators* (these are not case sensitive).

- ▶ 'And'. Use between two search criteria to generate a result where both criteria are met, e.g. gold and silver.
- ▶ 'Or'. Use between two search criteria to generate a result where either criterion is met, e.g. gold or silver.
- ▶ 'And Not'. Use between two search criteria to generate a result where the first criterion is met but not the second, e.g. gold and not silver.
- ▶ 'Near'. Use between two search criteria to generate a result where the first criterion appears within a certain number of characters of the second e.g. gold near silver.

Phrase Searches

For a string of search terms, enclose the phrase with " " e.g. "Olympic Dam" or "optic fibre".

Truncation / Wild Card *

Allows for a more expansive search by matching characters specified within a string or word e.g. insur* generates results which include insure, insurer and insurance.

Create Reports

Reports can be created either by using search results or by creating reports using the Report Tool directly.

Create Reports Using Search Results

First, choose companies for the report. In the Search Results page tick the companies you wish to include in the reports then click on 'Create Report from Selected Companies' which takes you to the Reporting Tool.

Step A: Report Scope

In the Report Tool, the Report Scope will be automatically populated with the ASX Codes of the chosen companies. You can change the company list if required.

Step B: Select information to include in report

The 'List of Report Fields' link (located below the Select Subsection Box) provides a full list of all available report items.

1. 'Select Section' from drop-down list
2. 'Select Sub Section' from drop-down list
3. 'Add Query'. Your report criteria will be added to the Report Format Criteria box. If you wish to add to your report, simply repeat these steps.
4. Run 'Query'

Create Reports Directly

1. To create reports without first executing a search, go directly into the Report Tool.
2. Enter the companies required in Report Scope. Simply enter the ASX code/codes in the box provided (use the Code Look Up feature if you don't know the code).
3. Follow Step B above in creating reports using search results.

Print and Download

Printer-friendly page versions

You can choose to print in CSV (spreadsheet style) or HTML (web page style).

All sections for each company offer a print/download option.

Downloading Search Results

On the Search Results page, click the 'Download Results' tab on top left of screen. This will automatically download your results into a CSV file. You then have the option to either Open or Save the spreadsheet.

Downloading Reports

When the Report has been generated click on the 'Download Results' tab on top left of screen and choose 'CSV' or 'HTML'. You will then have the option to either Open or Save the document.

More Information

Contact your Morningstar account manager or our sales team.

Australia

+61 2 9276 4446 or email
hekpdesk.au@morningstar.com

New Zealand

+64 9 915 6771 or email helpdesk.nz@morningstar.com