HOW TO USE RESEARCH INSIGHT

Susan Hurst                                                                                                                          July, 2005

Research Insight is a database that contains 20 years of financial data on over 10,000 US companies. Data includes pre-defined reports and charts covering balance sheets, cash flow and income statements, ratio reports, industry analysis, etc. There is also the ability to construct customized charts and reports.

Search Tips & Tricks:

• To use Research Insight you must either come into King Library or use it at the Business School Lab, it is not available for use over the Internet. In King, it is currently loaded on all of the Dell computers. It is listed under the Programs area in the Start menu. It is NOT available on the Mac computers. It is also available on machines in the Business School computer lab in Laws Hall.

• Users must Log On to the computer using their UniqueID & password before opening Research Insight. Failure to do so will result in an error message about the CD-ROM. If that occurs, simply Log Off the machine and then Log In again, and Research Insight should load properly.

• Once in Research Insight, select “Open Report” from the initial menu. This option is also available from the left hand toolbar, it is the 6th icon down.

• Users then select the report they want (balance sheet, etc.). Click on the yellow folder icon to see the options under each report type. Then put your company’s Ticker Symbol in the box where it says “Companies”. If you don’t know the ticker symbol for your company, click on the “Look Up” button to locate the company. Select the company from the list at the right and click on “Paste” to enter the company into the system.

• The “Combined Report” includes the Balance sheets, Income Statements, Cash Flows, and Ratio Reports for a company for the last 5 years.

• You can also choose “New Report” at the bottom of the report page to create a customized report with elements you select.

• You can also select another time period to view. Use the tab at the top of the page where you put in the company’s ticker symbol. Click on select period and click on the “Enable all Alignment Options” box at the bottom of the screen to pick different reporting periods. Choose Calendar rather than “Absolute” to get calendar year data.

For further information on using this product, contact Susan Hurst, 529-4144, hurstsj@muohio.edu