




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# User's Handbook, VentureXpert Edition

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## Viewing this document

To navigate through this document, click on the  icon, or choose **Bookmarks and Page** from the **View** menu. This will display a column to the left of your document window with Bookmarks  for each topic. Bookmarks with triangles  have subtopics underneath them. Click on the triangle to reveal the subtopics. To view any topic, click on it's Bookmark.

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## Note

This quick start guide assumes you have logged into SDC Platinum to access the VentureXpert product and that you have little or no experience using the software. It will guide you through frequently asked questions for five of the VentureXpert product databases. Each answer is presented as a list of search and report steps. **Please note that normal database charges apply when running these reports.**

# Overview

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## What Is VentureXpert?

VentureXpert is one of the online product offerings available over SDC Platinum – Securities Data Company's proprietary Windows® application. VentureXpert includes 14 different product databases:

### *Industry Resources*

- Funds
- Firms
- Portfolio Companies
- Limited Partners
- Third Parties
- Individuals

### *Industry Statistics*

- Fund Commitments
- Fund Performance
- Fund Statistics
- Firm Capital Under Mgt
- Firm Statistics
- Company Investments
- Initial Public Offerings
- Mergers & Acquisitions

Securities Data Company's other products available over SDC Platinum are used to identify comparable financial transactions, monitor markets and industries, prospect for new business, and evaluate advisors. These products include:

- Global New Issues
- Mergers & Acquisitions
- Corporate Governance
- Corporate Restructurings
- Securities Trading
- Industry Specific
- Global Public Finance

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## Client Support and Contact Information

Client Support phone number	973-622-5200
Client Support fax	973-622-4701
Client Support E-mail	sdchelp@tfn.com
Sales phone number	212-484-4701
SDC web site	www.securitiesdata.com

# Getting Started

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## Logging into SDC Platinum

To log into SDC Platinum:



1. Double-click on the **SDC Platinum icon**.
2. Click on **Login**.
3. Enter your registered user initials and click on **OK**.

The SDC Bulletin Board appears.

4. Click on **OK**.
5. If prompted, enter a project description, and click on **OK**.

At the end of the login procedure, the Database Selection window appears. See "Database and Navigation Method".

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## Database and Navigation Method Windows

After you log into SDC Platinum or select New from the Main Session menu you will see the Database Selection window, which contains the VentureXpert product tab.

After selecting a database from the VentureXpert product tab, a Navigation Method window will open for you to select Express Reports or Search Menu. Express Reports generate quick report results by guiding you through pre-formatted search questions. Search Menu opens the Private Equity Fund Type window, the Date Range window or the Main Session window, depending on the database chosen.

For a description of all the SDC databases, see Online Help or Securities Data Company's Product Guide. For the procedure to select private equity fund types or date ranges, see Online Help.

## Database Selection Window

The **Database Selection** window is a dialog box with a title bar. It features a grid of categories at the top: Global New Issues, Mergers & Acquisitions, Corporate Governance, and Corporate Restructurings. Below this is a section for VentureXpert, including Securities Trading, Industry Specific, and Global Public Finance. The main area is titled "Official Database of the National Venture Capital Association" and contains several sections of radio button options: "Industry Resources" (Funds, Firms, Portfolio Companies, Limited Partners, Third Parties, Individuals), "Industry Statistics" (Fund: Commitments, Performance, Statistics; Firm: Capital Under Mgt, Statistics; Company: Investments (Disbursements), Initial Public Offerings, Mergers & Acquisitions), and "NVCA Free Reports". On the right side, there are three buttons: "OK", "Cancel", and "Help".

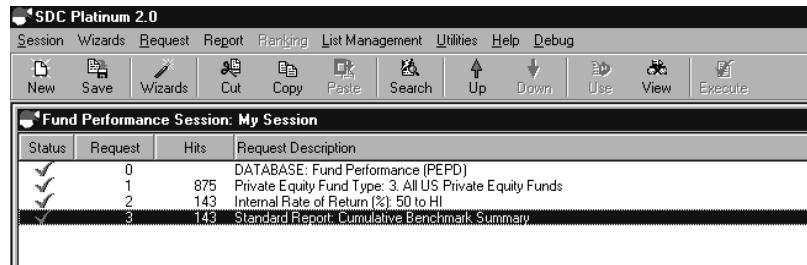
## Navigation Method Window

The **Navigation Method** window is a dialog box with a title bar. It contains two radio button options: "Express Reports" and "Search Menu". At the bottom of the window, there are two buttons: "OK" and "Cancel".















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## Main Session Window

After you select a VentureXpert database and Navigation Method of Search Menu, SDC Platinum opens the Main Session window. The Main Session window is where you build, store, execute, and modify your requests. You can use the icons and pull-down menus to perform tasks related to your session. You can also use right mouse commands (see "Right Mouse Commands").



## Main Session Window Features

Feature	Description
Session Window List Box	
Status	
  	<p>Checkmark indicates you executed the request.</p> <p>Curved arrow indicates you modified an executed request and need to re-execute.</p> <p>X indicates an error when executing the request.</p>
Request #	Sequential number for each request.
Hits	Number of transactions meeting your search criteria.
Request Description	Descriptions of your search/report/ranking requests.
<b>Toolbar icons</b>	
	Start a <b>new session</b> .
	<b>Save</b> the current session.
	<b>Cut</b> selected request to clipboard.
	<b>Copy</b> selected request to clipboard.
	<b>Paste</b> request from clipboard.
	Add requests using <b>Search Items</b> .
	Move the highlighted request <b>up</b> .
	Move the highlighted request <b>down</b> .
	<b>Use</b> an earlier request to perform another request.
	<b>View</b> results of the highlighted request.
	<b>Execute</b> your search/report/ranking requests.

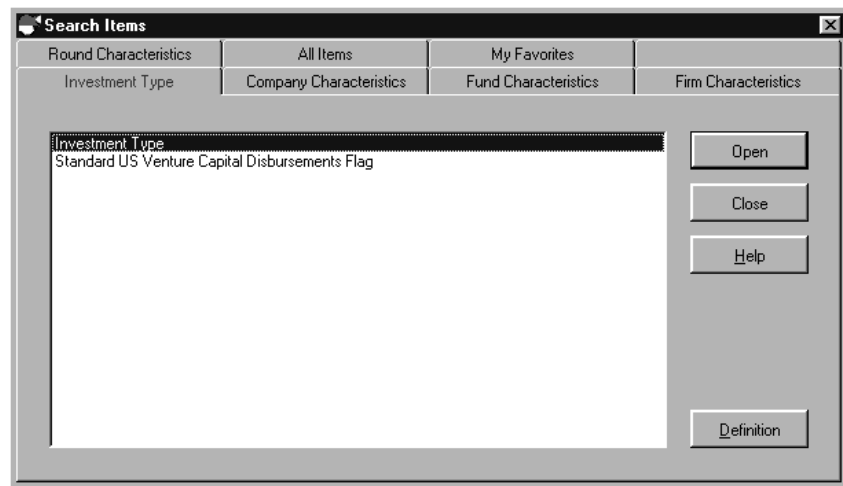
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## Search Items Window

To begin building your search, select items from the Search Items window. The Search Items window contains categorized lists of the most frequently searched items.

**Note:** If you wish to see a list of every available data item, you can use the All Items tab.

### Search Items





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## Right Mouse Commands

SDC Platinum provides right mouse button commands for commonly used functions on the following windows:

- Main Session window
- Category Selection window
- Company Identifier window
- Pick List window
- Design Custom Report Format window
- Document window

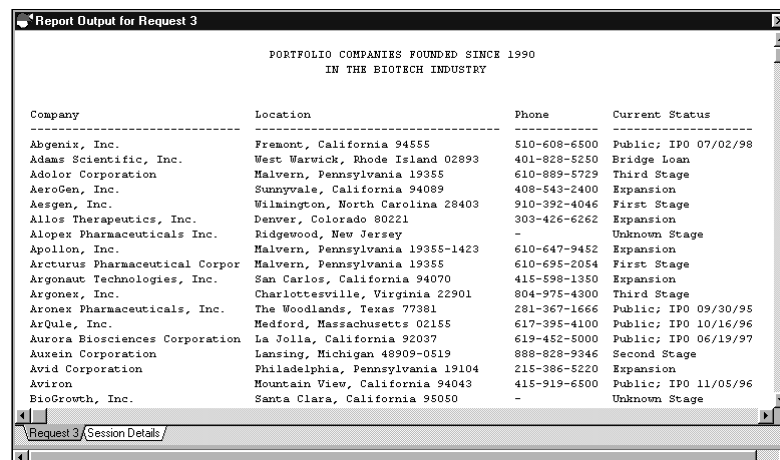
# Sample Sessions

## Portfolio Companies: Selecting a portfolio company founding date range and primary industry

### Sample Session

For this sample session you search for all portfolio companies founded since 1990 in the biotech industry. You then select the Portfolio Company List Report. You save the report output as an Excel spreadsheet and print it.

### Report



Report Output for Request 3

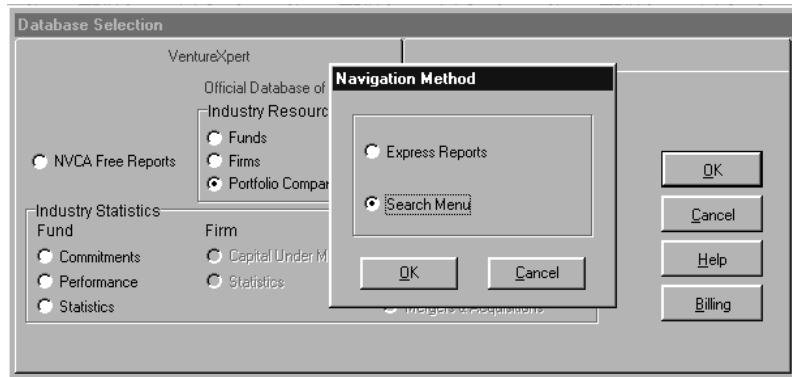
PORTFOLIO COMPANIES FOUNDED SINCE 1990  
IN THE BIOTECH INDUSTRY

Company	Location	Phone	Current Status
Abgenix, Inc.	Fremont, California 94555	510-608-6500	Public; IPO 07/02/98
Admas Scientific, Inc.	West Warwick, Rhode Island 02893	401-828-5250	Bridge Loan
Adolor Corporation	Malvern, Pennsylvania 19355	610-889-5729	Third Stage
Aerogen, Inc.	Sunnyvale, California 94089	408-543-2400	Expansion
Aesgen, Inc.	Wilmington, North Carolina 28403	910-392-4046	First Stage
Allos Therapeutics, Inc.	Denver, Colorado 80221	303-426-6262	Expansion
Alopec Pharmaceuticals Inc.	Ridgewood, New Jersey	-	Unknown Stage
Apollon, Inc.	Malvern, Pennsylvania 19355-1423	610-647-9452	Expansion
Arcturus Pharmaceutical Corpor	Malvern, Pennsylvania 19355	610-695-2054	First Stage
Argonaut Technologies, Inc.	San Carlos, California 94070	415-598-1350	Expansion
Argonex, Inc.	Charlottesville, Virginia 22901	804-975-4300	Third Stage
Aronex Pharmaceuticals, Inc.	The Woodlands, Texas 77381	281-367-1666	Public; IPO 09/30/95
ArQule, Inc.	Medford, Massachusetts 02155	617-395-4100	Public; IPO 10/16/96
Aurora Biosciences Corporation	La Jolla, California 92037	619-452-5000	Public; IPO 06/19/97
Auxxin Corporation	Lansing, Michigan 48909-0519	888-828-9346	Second Stage
Avid Corporation	Philadelphia, Pennsylvania 19104	215-386-5220	Expansion
Aviron	Mountain View, California 94043	415-919-6500	Public; IPO 11/05/96
BioGrowth, Inc.	Santa Clara, California 95050	-	Unknown Stage

*Navigation Method*

### Step 1: Selecting a Navigation Method

1. From the Database Selection window VentureXpert tab, select **Portfolio Companies** then click on **OK**.
2. From the Navigation Method window, select **Search Menu** then click on **OK**.



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### Session Requirements

✓ **Select a Navigation Method**

Portfolio Company Founding Date: 1/1/1990 to TODAY

Portfolio Company Primary Industry: All Biotechnology

Execute search criteria

Select a standard report

Save report output as an Excel spreadsheet

Print report output

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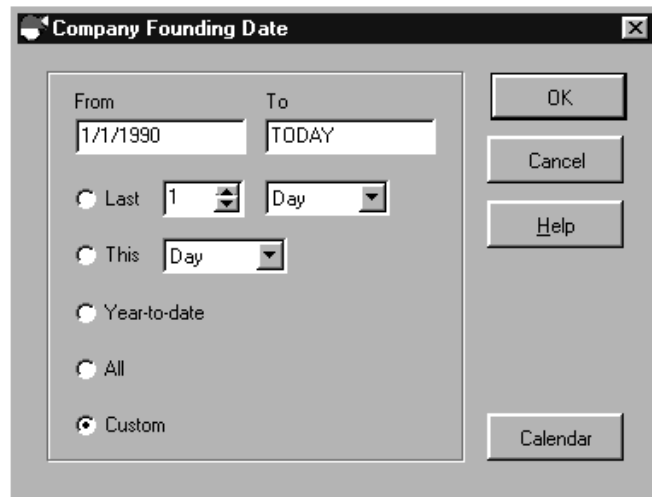
*Portfolio Company  
Founding Date Range*

## Step 2: Selecting a Founding Date Range

1. From the Express Search Items window Portfolio Company tab, double-click on **Company Founding Date**.

Hint: You can double-click on a data item, or you can click on an item to highlight it then click on Open.

2. In the From text box type **1/1/1990** or **1990**.
3. In the To text box, accept the default (**TODAY**).



4. Click on **OK**.

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## Session Requirements

- ✓ Select a Navigation Method
- ✓ **Portfolio Company Founding Date: 1/1/1990 to TODAY**

Portfolio Company Primary Industry: All Biotechnology

Execute search criteria

Select a standard report

Save report output as an Excel spreadsheet

Print report output

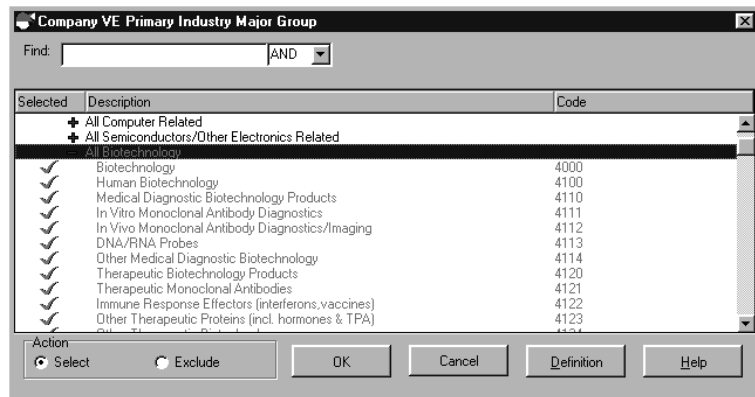
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*Portfolio Company  
Primary Industry*

### Step 3: Selecting a Primary Industry

1. From the Express Search Items window Company Characteristics tab, double-click on **Company VE Primary Industry Major Group**.
2. Highlight All Biotechnology, press the right mouse button and click on **Select Highlighted Item(s)**.



**Hint:** If a category has a plus sign (+), double-click to expand it. Expanded categories have a minus sign (-). To select an entire category, highlight it and press **Enter**.

3. Click on **OK**.
4. Click on **Close** to close the Search Items window.

---

### Session Requirements

- ✓ Select a Navigation Method
- ✓ Portfolio Company Founding Date: 1/1/1990 to TODAY
- ✓ **Portfolio Company Primary Industry: All Biotechnology**

Execute search criteria

Select a standard report

Save report output as an Excel spreadsheet

Print report output

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## Step 4: Executing the Search

You entered all your search criteria and can now execute.

*Execute*

Click on the Execute icon .

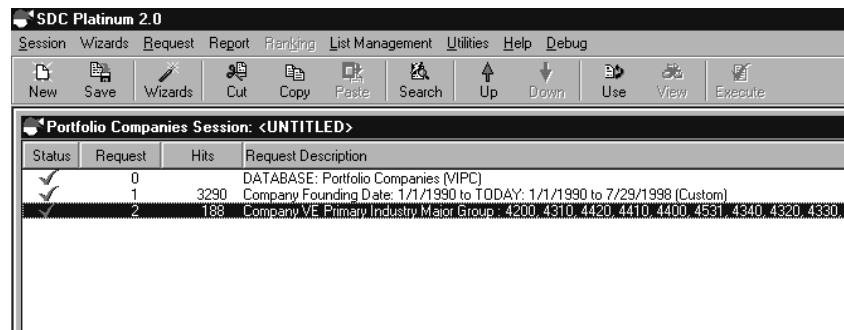
or

From the Session menu, select Execute.

During the execution, the status window appears on top of the Main Session window.

**Hint:** The Main Session window Hits column shows the number of transactions that meet your criteria.

**Hint:** To modify a request after executing, double-click on the search request and make the necessary changes in the window.



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## Session Requirements

- ✓ Select a Navigation Method
- ✓ Portfolio Company Founding Date: 1/1/1990 to TODAY
- ✓ Portfolio Company Primary Industry: All Biotechnology
- ✓ **Execute search criteria**

Select a standard report

Save report output as an Excel spreadsheet

Print report output

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## Step 5: Selecting a Standard Report

1. From the Report menu, select Open Existing/SDC Standard.
2. From the Standard Report window Brief tab, click on **Portfolio Company List**.

**Hint:** The Special tab lists reports that SDC designs at the request of your company.

**Hint:** You can highlight a report and click on **Example** to view a sample of the report. To close the sample report, from the Document menu select **Close**. You are not charged to look at sample reports.

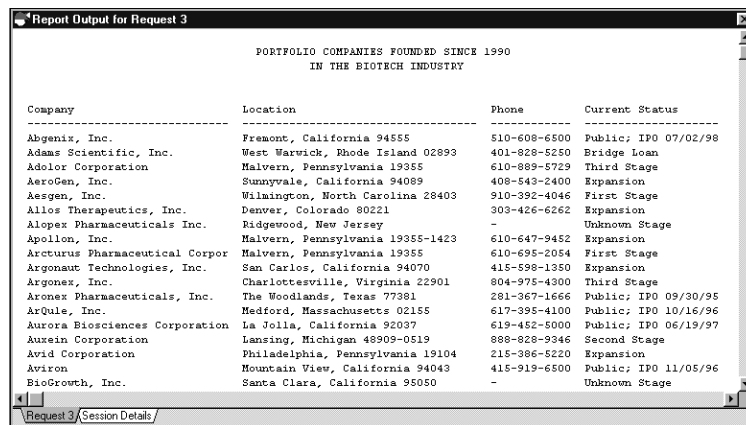
3. Click on **OK** to open the Report Output Options window.  
**Hint:** SDC suggests you add titles to your reports and make them as descriptive as possible.
4. In the Report Output Options window Titles and Options tab, type the following title lines:
  - Line 1: **Portfolio Companies founded since 1990**
  - Line 2: **in the Biotech Industry**

The screenshot shows the 'Report Options' dialog box with the 'Titles and Options' tab selected. The dialog has three buttons at the top: 'Titles and Options', 'Sort', and 'Save As'. Below these is a section for entering titles, with four lines. Line 1 contains 'Portfolio Companies founded since 1990' and Line 2 contains 'in the Biotech Industry'. Below the title section are two sub-sections: 'Report Options' and 'Format'. The 'Report Options' section has three checkboxes: 'Add Summary Statistics' (unchecked), 'Include Session Details' (checked), and a dropdown menu for 'Transactions per Group' set to '5'. There is also a 'Group Separator' field with a minus sign. The 'Format' section has two radio buttons: 'Text' (selected) and 'Columnar Grid'. Below the format section is a text box for 'Enter a Footnote'. At the bottom right are three buttons: 'OK', 'Cancel', and 'Help'.

5. Click on **OK** to close the Report Output Options window.  
The report request is added to the Request Description list box on the Main Session window.

6. From the Session menu, select **Execute**.

SDC Platinum generates and displays your report output.



PORTFOLIO COMPANIES FOUNDED SINCE 1990  
IN THE BIOTECH INDUSTRY

Company	Location	Phone	Current Status
Abgenix, Inc.	Fremont, California 94555	510-608-6500	Public; IPO 07/02/98
Adams Scientific, Inc.	West Warwick, Rhode Island 02893	401-828-5250	Bridge Loan
Adolor Corporation	Malvern, Pennsylvania 19355	610-889-5729	Third Stage
AeroGen, Inc.	Sunnyvale, California 94089	408-543-2400	Expansion
Aesgen, Inc.	Wilmington, North Carolina 28403	910-392-4046	First Stage
Allos Therapeutics, Inc.	Denver, Colorado 80221	303-426-6262	Expansion
Alopec Pharmaceuticals Inc.	Ridgewood, New Jersey	-	Unknown Stage
Apollon, Inc.	Malvern, Pennsylvania 19355-1423	610-647-9452	Expansion
Arcturus Pharmaceutical Corpor	Malvern, Pennsylvania 19355	610-695-2054	First Stage
Argonaut Technologies, Inc.	San Carlos, California 94070	415-598-1350	Expansion
Argonex, Inc.	Charlottesville, Virginia 22901	804-975-4300	Third Stage
Aronex Pharmaceuticals, Inc.	The Woodlands, Texas 77381	281-367-1666	Public; IPO 09/20/95
ArQule, Inc.	Nedford, Massachusetts 02155	617-395-4100	Public; IPO 10/15/96
Aurora Biosciences Corporation	La Jolla, California 92037	619-452-5000	Public; IPO 06/19/97
Auxen Corporation	Lansing, Michigan 48909-0519	888-828-9346	Second Stage
Avid Corporation	Philadelphia, Pennsylvania 19104	215-386-5220	Expansion
Aviron	Mountain View, California 94043	415-919-6500	Public; IPO 11/05/96
BioGrowth, Inc.	Santa Clara, California 95050	-	Unknown Stage

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## Session Requirements

- ✓ Select a Navigation Method
- ✓ Portfolio Company Founding Date: 1/1/1990 to TODAY
- ✓ Portfolio Company Primary Industry: All Biotechnology
- ✓ Execute search criteria
- ✓ **Select a standard report**

Save report output as an Excel spreadsheet

Print report output

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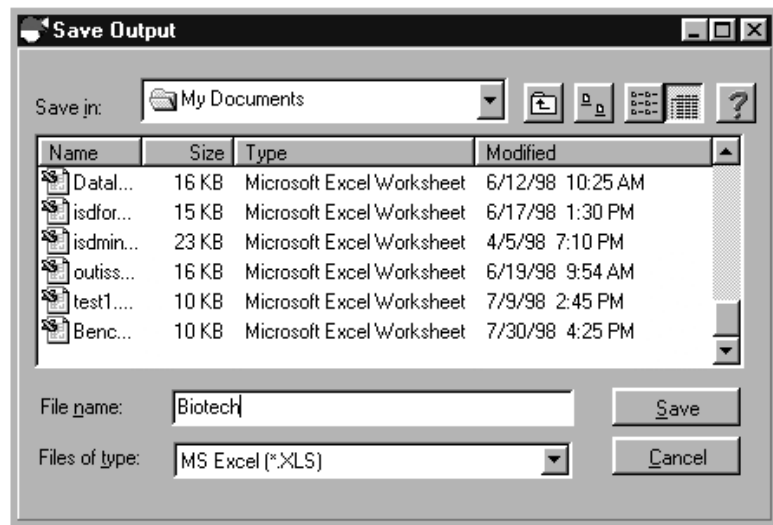
## Step 6: Saving Report Output to a Spreadsheet

SDC displays your report output in Document window. From the Document window you can save your report to a text, Microsoft Excel, or Lotus 1-2-3 file. SDC adds the file name to the custom report request description on the Main Session window.

*Excel spreadsheet output*

1. From the Document menu, select Export/Save As to open the Save Output window.
2. Click on the Save File as type down arrow and select MS Excel.
3. In the File Name text box, type **Biotech** and accept the .XLS extension.
4. Select a drive and directory if necessary.
5. Click on **OK**.

The system saves the data to the specified file and returns you to the Document window



---

## Session Requirements


- ✓ Select a Navigation Method
- ✓ Portfolio Company Founding Date: 1/1/1990 to TODAY
- ✓ Portfolio Company Primary Industry: All Biotechnology
- ✓ Execute search criteria
- ✓ Select a standard report
- ✓ **Save report output as an Excel spreadsheet**

Print report output

---

## Step 7: Printing Report Output

*Print Biotech report*

1. From the Document window, click on the Print icon .

**Hint:** To display a report from the Main Session window, highlight an executed report request, and click on the **View** icon



2. In the Print window, click on **OK**.
3. From the Document menu, select Close to return to the Main Session window.

Notice that the name of the report appears in Request 3.

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### Session Requirements

- ✓ Select a Navigation Method
  - ✓ Portfolio Company Founding Date: 1/1/1990 to TODAY
  - ✓ Portfolio Company Primary Industry: All Biotechnology
  - ✓ Execute search criteria
  - ✓ Select a standard report
  - ✓ Save report output as an Excel spreadsheet
  - ✓ Print report output
- 
-

## Fund Performance: Selecting venture capital follow-on funds with committed capital of \$5 million or greater

### Sample Session

For this sample session you search for all US venture capital follow-on funds with committed capital of at least \$5 million. You then select a Summary Performance report. You save the report output as an Excel spreadsheet and print it. Finally, you save the session and reload it.

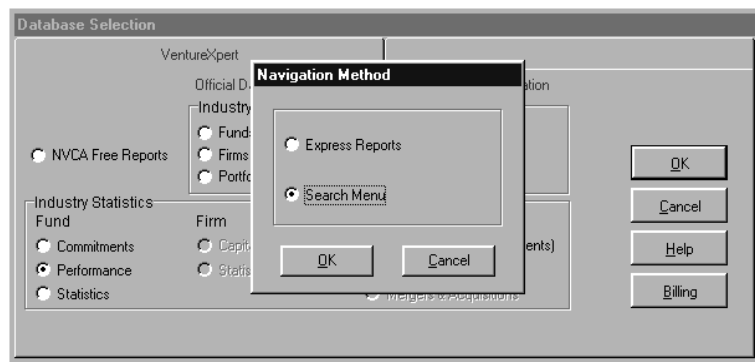
### Report

Venture Economics Information Services Cumulative Benchmark Summary Report										
FROM	TO	SAMP SIZE	CAPWTD POOLED							
			AVG	AVG	AVG	MAX	UPPER	MEDIAN	LOWER	MIN
Cumulative IRR										
Inception 12/31/96	428	13.5	18.2	15.0	125.9	19.9	10.2	2.8	-60.4	
Inception 12/31/97	454	14.1	19.3	15.7	257.5	19.7	10.2	3.1	-89.7	
DPI Ratio										
Inception 12/31/96	428	1.12	0.95	1.12	7.59	1.64	0.89	0.23	0.00	
Inception 12/31/97	454	1.24	1.06	1.29	9.86	1.80	0.98	0.27	0.00	
RWPI Ratio										
Inception 12/31/96	428	0.69	0.93	0.88	4.15	0.99	0.64	0.16	0.00	
Inception 12/31/97	454	0.62	0.87	0.80	6.90	0.96	0.53	0.12	0.00	
TVPI Ratio										
Inception 12/31/96	428	1.81	1.88	2.00	7.59	2.16	1.49	1.13	0.02	
Inception 12/31/97	454	1.86	1.93	2.09	13.20	2.18	1.50	1.12	0.02	

*Navigation Method*

### Step 1: Selecting a Navigation Method

1. From the Database Selection window VentureXpert tab, select **Fund Performance** then click on **OK**.
2. From the Navigation Method window, select **Search Menu** then click on **OK**.



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### Session Requirements

✓ **Select a Navigation Method**

Private Equity Fund Type: US Venture Capital Funds

Fund Sequence Type: Follow-on Funds

Fund Size: \$5 Mil+

Execute search criteria

Select a standard report

Save report output as an Excel spreadsheet

Print report output

Save the session for future use

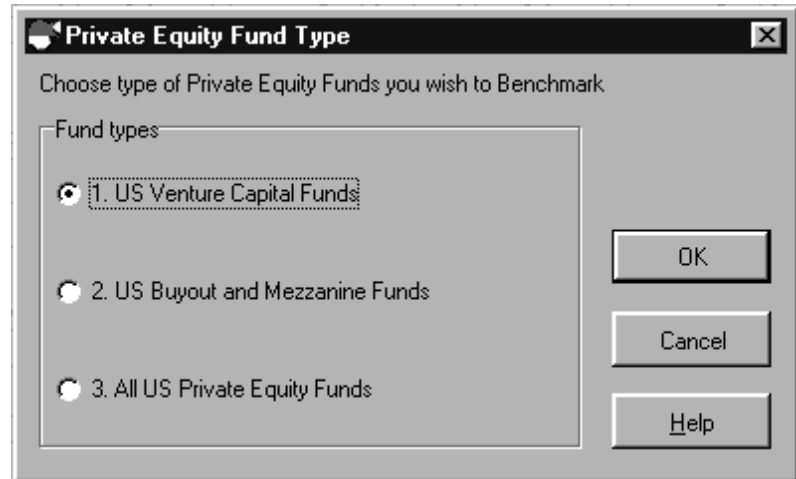
Load the saved session

---

*Private Equity Fund Type*

## Step 2: Selecting a Private Equity Fund Type

1. In the Private Equity Fund Type window, select **US Venture Capital Funds**.



2. Click on **OK** to continue to the Express Search Items window.

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### Session Requirements

- ✓ Select a Navigation Method
  - ✓ **Private Equity Fund Type: US Venture Capital Funds**
  - Fund Sequence Type: Follow-on Funds
  - Fund Size: \$5 Mil+
  - Execute search criteria
  - Select a standard report
  - Save report output as an Excel spreadsheet
  - Print report output
  - Save the session for future use
  - Load the saved session
- 
-

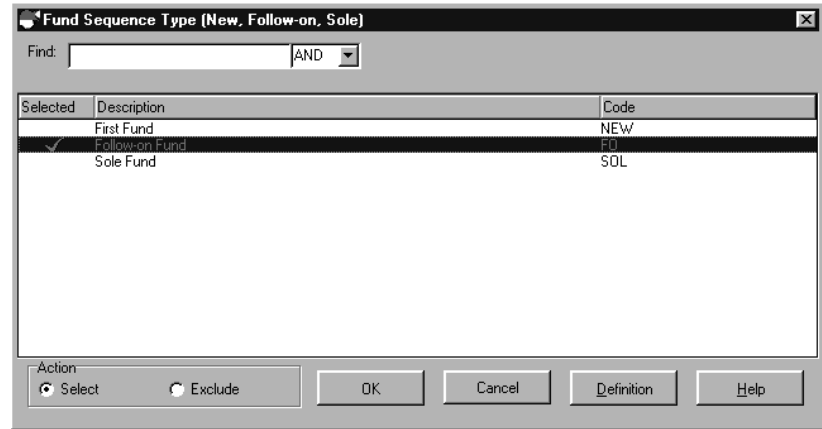
*Fund Sequence Type*

### Step 3: Selecting a Fund Sequence Type

1. From the Express Search Items window Fund Characteristics tab, double-click on **Fund Sequence Type**.

**Hint:** You can double-click on a data item, or you can click on an item to highlight it then click on Open.

2. Double-click on **Follow-on Fund**.



3. Click on **OK**.

---

### Session Requirements

- ✓ Select a Navigation Method
  - ✓ Private Equity Fund Type: US Venture Capital Funds
  - ✓ **Fund Sequence Type: Follow-on Funds**
- Fund Size: \$5 Mil+
- Execute search criteria
- Select a standard report
- Save report output as an Excel spreadsheet
- Print report output
- Save the session for future use
- Load the saved session
-

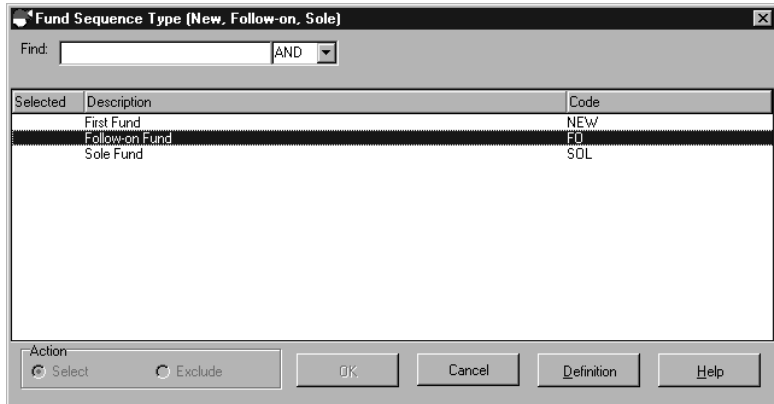
*Fund Size*

#### Step 4: Selecting a Fund Size

1. From the Express Search Items window Fund Characteristics tab, double-click on **Fund Size**.

**Hint:** To see the definition of Fund Size, highlight the data item and click on **Definition**.

2. In the LO text box, type **5**, in the HI text box accept the default, **HI**.



3. Click on **OK**.
4. Click on **Close** to close the Search Items window.

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### Session Requirements

- ✓ Select a Navigation Method
- ✓ Private Equity Fund Type: US Venture Capital Funds
- ✓ Fund Sequence Type: Follow-on Funds
- ✓ **Fund Size: \$5 Mil+**

Execute search criteria

Select a standard report

Save report output as an Excel spreadsheet

Print report output

Save the session for future use

Load the saved session

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Execute

## Step 5: Executing the Search

You entered all your search criteria and can now execute.

Click on the Execute icon .

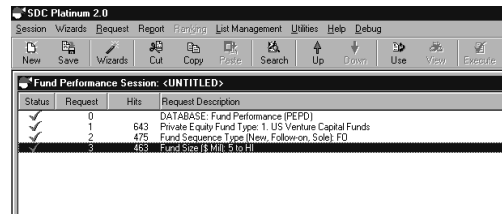
or

From the Session menu, select Execute.

During the execution, the status window appears on top of the Main Session window.

**Hint:** The Main Session window Hits column shows the number of transactions that meet your criteria.

**Hint:** To modify a request after executing, double-click on the search request and make the necessary changes in the window.



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## Session Requirements

- ✓ Select a Navigation Method
- ✓ Private Equity Fund Type: US Venture Capital Funds
- ✓ Fund Sequence Type: Follow-on Funds
- ✓ Fund Size: \$5 Mil+
- ✓ **Execute search criteria**

Select a standard report

Save report output as an Excel spreadsheet

Print report output

Save the session for future use

Load the saved session

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*Cumulative Benchmark  
Summary Report*

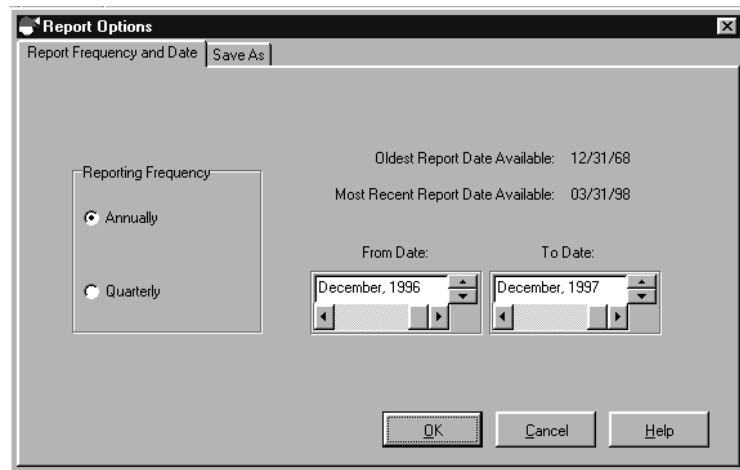
## Step 6: Selecting a Standard Report

1. From the Report menu, select Open Existing/SDC Standard.
2. From the Standard Report window Summary Performance tab, click on **Cumulative Benchmark Summary Report**.

**Hint:** The Special tab lists reports SDC designs at the request of your company.

**Hint:** You can highlight a report and click on **Example** to view a sample of the report. To close the sample report, from the Document menu select **Close**. You are not charged to look at sample reports.

3. Click on **OK** to open the Report Output Options window.
4. In the Report Output Options window Report Frequency and Date tab, enter the following criteria:
  - Reporting Frequency: **Annually**
  - From Date: **December, 1996**
  - To Date: **December, 1997**



5. Click on **OK** to close the Report Output Options window.  
The report request is added to the Request Description list box on the Main Session window.

- From the Session menu, select **Execute**.  
SDC Platinum generates and displays your report output.

Venture Economics Information Services Cumulative Benchmark Summary Report										
FROM	TO	SAMP SIZE	AVG	CAPWTD AVG	POOLED AVG	MAX	UPPER	MEDIAN	LOWER	MIN
Cumulative IRR										
Inception	12/31/96	428	13.5	18.2	15.0	125.9	19.9	10.2	2.8	-60.4
Inception	12/31/97	454	14.1	19.3	15.7	257.5	19.7	10.2	3.1	-89.7
DPI Ratio										
Inception	12/31/96	428	1.12	0.95	1.12	7.59	1.64	0.89	0.23	0.00
Inception	12/31/97	454	1.24	1.06	1.29	9.86	1.80	0.98	0.27	0.00
RVPI Ratio										
Inception	12/31/96	428	0.69	0.93	0.88	4.15	0.99	0.64	0.16	0.00
Inception	12/31/97	454	0.62	0.87	0.80	6.90	0.96	0.53	0.12	0.00
TVPI Ratio										
Inception	12/31/96	428	1.81	1.88	2.00	7.59	2.16	1.49	1.13	0.02
Inception	12/31/97	454	1.86	1.93	2.09	13.20	2.18	1.50	1.12	0.02

---



---

## Session Requirements

- ✓ Select a Navigation Method
  - ✓ Private Equity Fund Type: US Venture Capital Funds
  - ✓ Fund Sequence Type: Follow-on Funds
  - ✓ Fund Size: \$5 Mil+
  - ✓ Execute search criteria
  - ✓ **Select a standard report**
- Save report output as an Excel spreadsheet
- Print report output
- Save the session for future use
- Load the saved session
- 
-

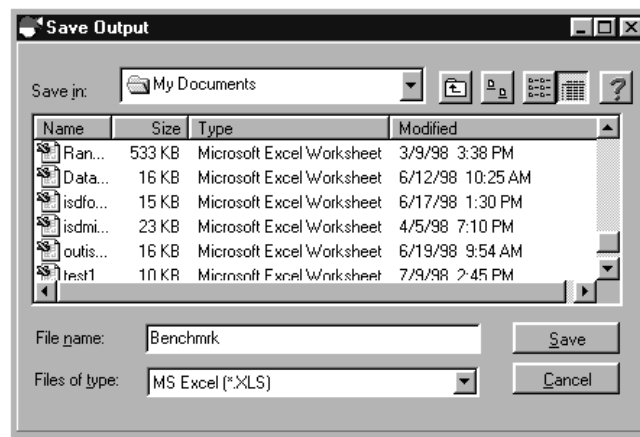
## Step 7: Saving Report Output to a Spreadsheet

SDC displays your report output in Document window. From the Document window you can save your report to a text, Microsoft Excel, or Lotus 1-2-3 file. SDC adds the file name to the custom report request description on the Main Session window.

*Excel spreadsheet output*

1. From the Document menu, select Export/Save As to open the Save Output window.
2. Click on the Save File as type down arrow and select MS Excel.
3. In the File Name text box, type **Benchmrk** and accept the .XLS extension.
4. Select a drive and directory if necessary.
5. Click on **OK**.

The system saves the data to the specified file and returns you to the Document window



---

## Session Requirements

- ✓ Select a Navigation Method
- ✓ Private Equity Fund Type: US Venture Capital Funds
- ✓ Fund Sequence Type: Follow-on Funds
- ✓ Fund Size: \$5 Mil+
- ✓ Execute search criteria
- ✓ Select a standard report
- ✓ **Save report output as an Excel spreadsheet**

Print report output


Save the session for future use

Load the saved session

---

## Step 8: Printing Report Output

*Print Benchmrk report*

1. From the Document window, click on the Print icon .

**Hint:** To display a report from the Main Session window, highlight an executed report request, and click on the **View** icon



2. In the Print window, click on **OK**.
3. From the Document menu, select Close to return to the Main Session window.

Notice that the name of the report appears in Request 4.

---

---

### Session Requirements

- ✓ Select a Navigation Method
- ✓ Private Equity Fund Type: US Venture Capital Funds
- ✓ Fund Sequence Type: Follow-on Funds
- ✓ Fund Size: \$5 Mil+
- ✓ Execute search criteria
- ✓ Select a standard report
- ✓ Save report output as an Excel spreadsheet
- ✓ **Print report output**

Save the session for future use

Load the saved session


---

---

## Step 9: Saving Your Session

SDC Platinum lets you save your sessions for future use. This feature is useful, for example, if you create weekly or monthly requests with the same search criteria. When you load a saved session, the search/report/rank criteria is displayed in the Request Description list box of the Main Session window. You can modify the criteria (for example, the offer date) or simply execute the session.

*Save session as  
Benchmark*

1. From the Main Session window, click on the Save icon .
2. In the Save Session window Save Session text box, type **Benchmark**.
3. If necessary, select the drive and directory or the group.
4. In the Description text box, type **Fund Performance Benchmark Session**.
5. In the Comments text box type **US Venture Capital follow-on funds, committed capital of \$5 million and greater**.  
**Note:** SDC Platinum fills in deal type (e.g., PEPD), author (initials of person logged onto SDC Platinum), date and time session was created, date and time last updated and by whom.
6. Click on **OK** to save the session and return to the Main Session window.

---

---

## Session Requirements

- ✓ Select a Navigation Method
- ✓ Private Equity Fund Type: US Venture Capital Funds
- ✓ Fund Sequence Type: Follow-on Funds
- ✓ Fund Size: \$5 Mil+
- ✓ Execute search criteria
- ✓ Select a standard report
- ✓ Save report output as an Excel spreadsheet
- ✓ Print report output
- ✓ **Save the session for future use**

Load the saved session

---

---

## Step 10: Loading a Saved Session

You can load any saved session, modify the criteria (for example, the offer date), and execute the new session. You can also load and use any saved session as is.

*Load Benchmark session*

1. From the Session menu, select Close.  
**Note:** You can only have one session open at a time.
2. From the Session menu, select Open Existing/Custom.
3. In the Open Session window Saved Sessions list box, click on **Benchmark**.

**Note:** If necessary, select the drive and directory or the group.

**Hint:** You can click on the toggle  icon next to the Session Name text box to view summary information for the selected session.

4. Click on **OK**.

The session appears on the Main Session window. You can execute the session as is or modify it and then execute it.

---

---

## Session Requirements

- ✓ Select a Navigation Method
  - ✓ Private Equity Fund Type: US Venture Capital Funds
  - ✓ Fund Sequence Type: Follow-on Funds
  - ✓ Fund Size: \$5 Mil+
  - ✓ Execute search criteria
  - ✓ Select a standard report
  - ✓ Save report output as an Excel spreadsheet
  - ✓ Print report output
  - ✓ Save the session for future use
  - ✓ **Load the saved session**
- 
-

## Company Investments: Selecting computer hardware companies in the Northeast, funding between '93 and '96 from California funds where total round amount is known.

### Sample Session

For this sample session you search for all computer hardware companies in the Northeast that have received funding between 1993 and 1996 from California funds, where the total financing round amount is known. You then design a custom report and select a Fund Investment Analytics Report. You save the Fund Investment Analytics report output as an Excel spreadsheet and then view the custom report output. Finally, you exit SDC Platinum.

### Reports

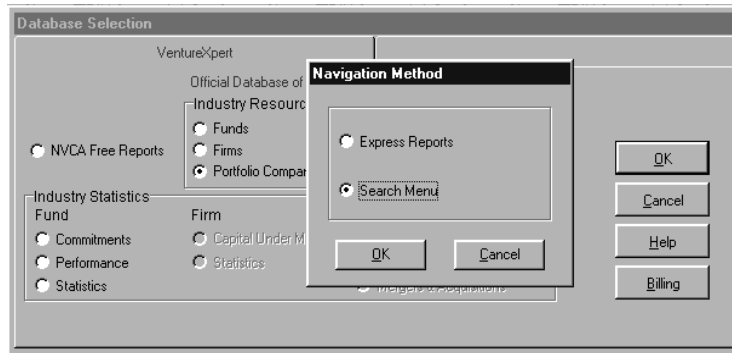
Company Name	Round Date	Round Number	Round Total (\$ Thous)	Fund Name
1 Connected Corporation	06/14/96	1	4171.0	Hambrecht &
2 net.Genesis	07/01/96	1	4500.0	Robertson S
3 GC Tech, Inc.	10/01/96	2	8000.0	Walden Grou Verces Mans
4 Audible Words Corporation	07/25/96	1	5000.0	Kleiner Per
5 Avicenna Systems Corporation	12/28/95	1	1350.0	Delphi Vent
6 Avicenna Systems Corporation	04/01/96	2	3000.0	Delphi Vent
7 Cascade Systems	07/20/94	1	1700.0	Hambrecht & Adobe Ventu
8 CoStar Corporation	01/01/93	5	1500.0	Bay Partner
11 Firefly Network, Inc.	04/12/96	1	5400.0	Information
12 InStream Corporation	08/04/95	2	3100.0	Delphi Vent
13 InStream Corporation	07/10/96	3	5200.0	Delphi Vent

Fund Name	NUM OF RND	NUM OF CMP	NUM OF FND	NUM OF FRM	TOT #MIL	AVG INV PER	AVG CMP PER	AVG FND PER
Information Associates, L.P.	3	3	1	1	9.7	3.2	3.2	9.7
Hambrecht & Quist Venture Partners - Unknown	3	3	1	1	7.7	2.6	2.6	7.7
Technology Funding Partners I	2	1	1	1	5.1	2.5	5.1	5.1
Delphi Ventures - Unknown	4	2	1	1	4.3	1.1	2.1	4.3
Vertex Management Inc	1	1	1	1	2.6	2.6	2.6	2.6
Walden Group - Unknown	1	1	1	1	2.6	2.6	2.6	2.6
Rומר Winblad Venture Partners	1	1	1	1	1.7	1.7	1.7	1.7
Sigma Partners III	2	1	1	1	1.6	0.8	1.6	1.6
Robertson Stephens - Unknown	1	1	1	1	1.6	1.6	1.6	1.6
Adobe Ventures L.P.	1	1	1	1	1.3	1.3	1.3	1.3
Kleiner Perkins Caufield & Byers VIII	1	1	1	1	1.2	1.2	1.2	1.2
Menlo Ventures VI	1	1	1	1	0.8	0.8	0.8	0.8
Hambrecht & Quist Venture Partners	1	1	1	1	0.4	0.4	0.4	0.4
Bay Partners IV	1	1	1	1	0.2	0.2	0.2	0.2

*Navigation Method*

### Step 1: Selecting a Navigation Method

1. From the Database Selection window VentureXpert tab, select **Company Investments** then click on **OK**.
2. From the Navigation Method window, select **Search Menu** then click on **OK**.



---

---

### Session Requirements

✓ **Select a Navigation Method**

Financing Round Date Range: 01/01/93 to 12/31/96

Portfolio Company Primary Industry: All Computer Hardware

Portfolio Company State Region: Northeast

Fund State: California

Financing Round Total: Where Information is Available

Execute search criteria

Design a custom report

Select a standard report

Save standard report output as an Excel spreadsheet

View custom report output

Exit SDC Platinum

---

---

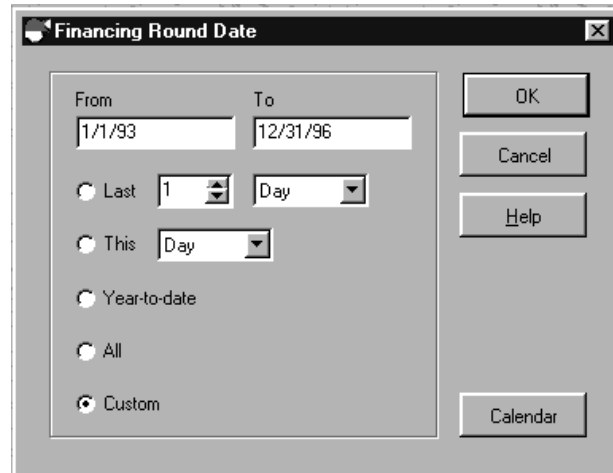


*Financing Round  
Date Range*

## Step 2: Selecting a Financing Round Date Range

You can enter date ranges in a variety of formats. You can use a preset date range such as year-to-date or enter a custom date range such as 6/30/1996 to 6/30/1997.

1. In the Financing Round Date window From text box type **01/01/93**.
2. In the To text box type **12/31/96**.



The screenshot shows a dialog box titled "Financing Round Date". It has two text input fields: "From" with the value "1/1/93" and "To" with the value "12/31/96". Below these are four radio button options: "Last" (selected), "This", "Year-to-date", and "All". The "Last" option has a spinner box with the number "1" and a dropdown menu with "Day" selected. The "Custom" option is also present and is selected. On the right side of the dialog, there are four buttons: "OK", "Cancel", "Help", and "Calendar".

3. Click on **OK** to continue to the Search Items window.

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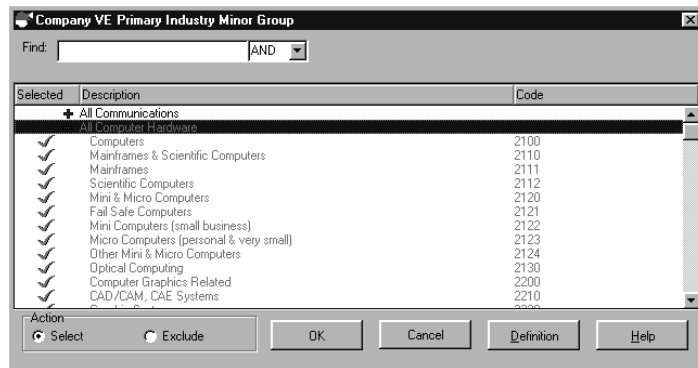
## Session Requirements

- ✓ Select a Navigation Method
  - ✓ **Financing Round Date Range: 01/01/93 to 12/31/96**
  - Portfolio Company Primary Industry: All Computer Hardware
  - Portfolio Company State Region: Northeast
  - Fund State: California
  - Financing Round Total: Where Information is Available
  - Execute search criteria
  - Design a custom report
  - Select a standard report
  - Save standard report output as an Excel spreadsheet
  - View custom report output
  - Exit SDC Platinum
-

*Portfolio Company  
Primary Industry*

### Step 3: Selecting a Company Primary Industry

1. From the Search Items window Company Characteristics tab, double-click on **Company Primary Industry Minor Group**.
2. Highlight **All Computer Hardware**, press the right mouse button and click on **Select Highlighted Item(s)**.



**Hint:** If a category has a plus sign (+), double-click to expand it. Expanded categories have a minus sign (-). To select an entire category, highlight it and press **Enter**.

3. Click on **OK**.

---

### Session Requirements

- ✓ Select a Navigation Method
  - ✓ Financing Round Date Range: 01/01/93 to 12/31/96
  - ✓ **Portfolio Company Primary Industry: All Computer Hardware**
- Portfolio Company State Region: Northeast  
Fund State: California  
Financing Round Total: Where Information is Available  
Execute search criteria  
Design a custom report  
Select a standard report  
Save standard report output as an Excel spreadsheet  
View custom report output  
Exit SDC Platinum
-

*Portfolio Company  
State Region*

#### **Step 4: Selecting a Company State Region**

1. From the Express Search Items window Company Characteristics tab, double-click on **Company State Region**.
2. Double-click on **Northeast**.
3. Click on **OK**.

---

---

#### **Session Requirements**

- ✓ Select a Navigation Method
- ✓ Financing Round Date Range: 01/01/93 to 12/31/96
- ✓ Portfolio Company Primary Industry: All Computer Hardware
- ✓ **Portfolio Company State Region: Northeast**

Fund State: California

Financing Round Total: Where Information is Available

Execute search criteria

Design a custom report

Select a standard report

Save standard report output as an Excel spreadsheet

View custom report output

Exit SDC Platinum

---

---

### Step 5: Selecting a Fund State

1. From the Express Search Items window Fund Characteristics tab, double-click on **Fund State**.
2. In the Find text box, type **calif** and press **Enter**.

**Hint:** To locate an item quickly, in the Find text box type at least three characters of the item and press Enter. The characters can be anywhere in an item description or code.



3. Click on **OK**.

---

---

### Session Requirements

- ✓ Select a Navigation Method
- ✓ Financing Round Date Range: 01/01/93 to 12/31/96
- ✓ Portfolio Company Primary Industry: All Computer Hardware
- ✓ Portfolio Company State Region: Northeast
- ✓ **Fund State: California**

Financing Round Total: Where Information is Available

Execute search criteria

Design a custom report

Select a standard report

Save standard report output as an Excel spreadsheet

View custom report output

Exit SDC Platinum

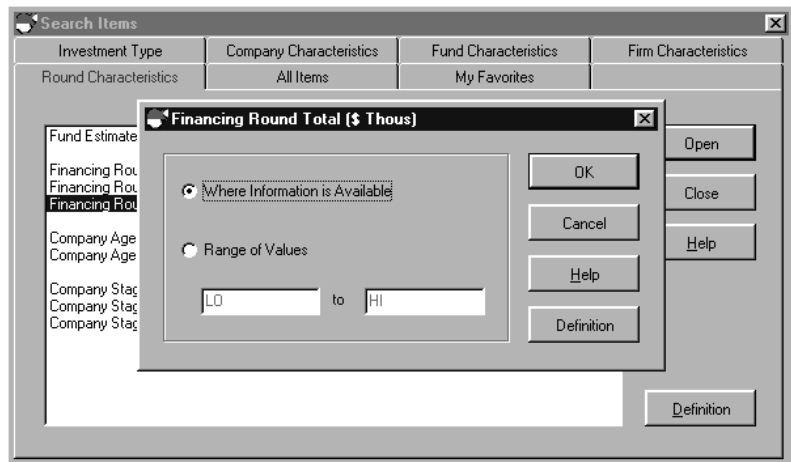
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---

*Financing Round Amount*

## Step 6: Selecting a Financing Round Amount

1. From the Express Search Items window Round Characteristics tab, double-click **Financing Round Total**.



2. Accept the default (**Where Information is Available**).
3. Click on **OK**.
4. Click on **Close**.

---

---

## Session Requirements

- ✓ Select a Navigation Method
- ✓ Financing Round Date Range: 01/01/93 to 12/31/96
- ✓ Portfolio Company Primary Industry: All Computer Hardware
- ✓ Portfolio Company State Region: Northeast
- ✓ Fund State: California
- ✓ **Financing Round Total: Where Information is Available**

Execute search criteria

Design a custom report

Select a standard report

Save standard report output as an Excel spreadsheet

View custom report output

Exit SDC Platinum

---

---

## Step 7: Executing the Search

You entered all your search criteria and can now execute.

*Execute*

Click on the Execute icon .

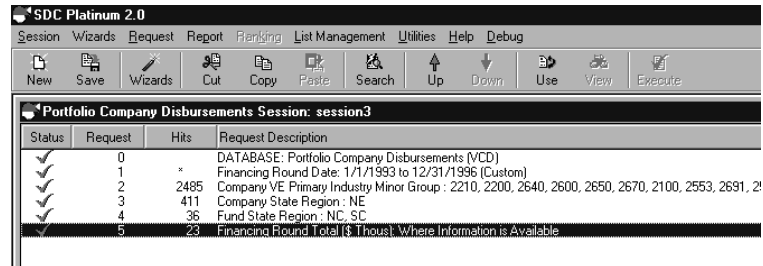
or

From the Session menu, select Execute.

During the execution, the status window appears on top of the Main Session window.

**Hint:** The Main Session window Hits column shows the number of transactions that meet your criteria.

**Hint:** To modify a request after executing, double-click on the search request and make the necessary changes in the window.



The screenshot shows the SDC Platinum 2.0 interface. The menu bar includes Session, Wizards, Request, Report, Ranking, List Management, Utilities, Help, and Debug. The toolbar contains icons for New, Save, Wizards, Cut, Copy, Paste, Search, Up, Down, Use, View, and Execute. The main window displays a table titled "Portfolio Company Disbursements Session: session3".

Status	Request	Hits	Request Description
✓	0	*	DATABASE: Portfolio Company Disbursements (MCD)
✓	1	*	Financing Round Date: 1/1/1993 to 12/31/1996 (Custom)
✓	2	2485	Company VE Primary Industry Minor Group : 2210, 2200, 2640, 2600, 2650, 2670, 2100, 2553, 2691, 2
✓	3	411	Company State Region : NE
✓	4	36	Fund State Region : NC, SC
✓	5	23	Financing Round Total (\$ Thous): Where Information is Available

---

## Session Requirements

- ✓ Select a Navigation Method
- ✓ Financing Round Date Range: 01/01/93 to 12/31/96
- ✓ Portfolio Company Primary Industry: All Computer Hardware
- ✓ Portfolio Company State Region: Northeast
- ✓ Fund State: California
- ✓ Financing Round Total: Where Information is Available
- ✓ **Execute search criteria**

Design a custom report

Select a standard report

Save standard report output as an Excel spreadsheet

View custom report output

Exit SDC Platinum

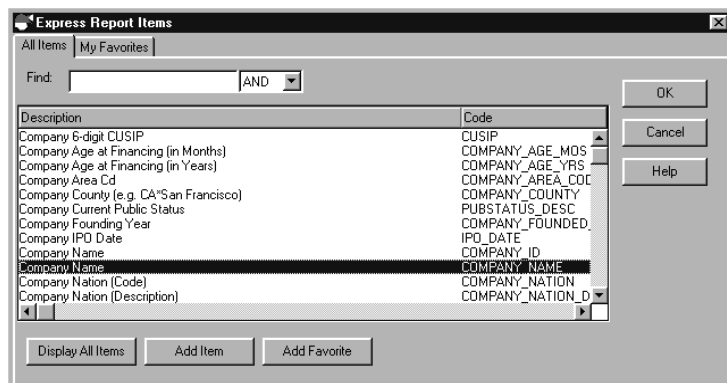
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## Step 8: Designing a Custom Report

SDC Platinum offers a variety of standard reports. SDC Platinum also lets you create your own reports. In this step you design a custom report called Computer with the data items: Line Counter, Company Name, Financing Round Date, Number, Total, and Fund Name.

### *Design Custom Report*

1. From the Report menu, select New Custom.
2. From the Express Report Items window All Items tab, select
  - Line Counter
  - Company Name
  - Financing Round Date
  - Financing Round Number
  - Financing Round Total
  - Fund Name



**Hint:** You can highlight a data item and click on  or  to change the order of the item. You can also click on  to insert page breaks in the report.

3. Click on **OK** to open the Save Custom Report window.
4. In the Custom Report Name text box, type **NEComp1**, and click on **OK** to open the Report Output Options window.
5. In the Report Output Options window Titles and Options tab, type the following title lines:
  - Line 1: **Computer Hardware Companies in the Northeast**
  - Line 2: **that have Received Funding from California Funds**
  - Line 3: **between 1993 and 1996**

*This Step is continued on the next page*

6. Click on **OK**.

The report request is added to the Request Description list box on the Main Session window.

---

---

### **Session Requirements**

- ✓ Select a Navigation Method
  - ✓ Financing Round Date Range: 01/01/93 to 12/31/96
  - ✓ Portfolio Company Primary Industry: All Computer Hardware
  - ✓ Portfolio Company State Region: Northeast
  - ✓ Fund State: California
  - ✓ Financing Round Total: Where Information is Available
  - ✓ Execute search criteria
  - ✓ **Design a custom report**
- Select a standard report
- Save standard report output as an Excel spreadsheet
- View custom report output
- Exit SDC Platinum
- 
-



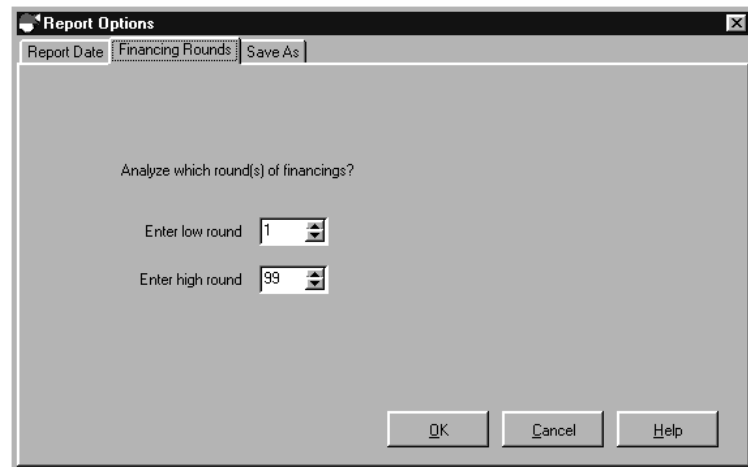
## Step 9: Selecting a Standard Report

1. From the Report menu, select Open Existing/SDC Standard.
2. From the Standard Report window Fund Investment Analytics tab, click on **Fund Name**.

**Hint:** The Special tab lists reports SDC designs at the request of your company.

**Hint:** You can highlight a report and click on **Example** to view a sample of the report. To close the sample report, from the Document menu select **Close**. You are not charged to look at sample reports.

3. Click on **OK** to open the Report Output Options window.
4. In the Report Output Options window Report Date tab, enter the following criteria:
  - From Date: **01/01/93**
  - To Date: **12/31/96**
5. In the Report Output Options window Financing Rounds tab, accept the default (**low round = 1, high round = 99**).



6. Click on **OK** to close the Report Output Options window.  
The report request is added to the Request Description list box on the Main Session window.

7. From the Session menu, select **Execute**.

SDC Platinum generates and displays your report output.

Venture Economics Information Services  
Investment Profiles Report  
Disbursements per Fund by Name  
01/01/93 to 12/31/96  
Rounds 1 to 99

Fund Name	NUM	NUM	NUM	NUM	TOT	AVG	AVG	AVG
	OF	OF	OF	OF	INV	PER	PER	PER
	RND	CMP	FND	FRM	\$MIL	RND	CMP	FND
Information Associates, L.P.	3	3	1	1	9.7	3.2	3.2	9.7
Hambrecht & Quist Venture Partners - Unknown	3	3	1	1	7.7	2.6	2.6	7.7
Technology Funding Partners I	2	1	1	1	5.1	2.5	5.1	5.1
Delphi Ventures - Unknown	4	2	1	1	4.3	1.1	2.1	4.3
Vertex Management Inc	1	1	1	1	2.6	2.6	2.6	2.6
Walden Group - Unknown	1	1	1	1	2.6	2.6	2.6	2.6
Rumler Winblad Venture Partners	1	1	1	1	1.7	1.7	1.7	1.7
Sigma Partners III	2	1	1	1	1.6	0.8	1.6	1.6
Robertson Stephens - Unknown	1	1	1	1	1.6	1.6	1.6	1.6
Adobe Ventures L.P.	1	1	1	1	1.3	1.3	1.3	1.3
Kleiner Perkins Caufield & Byers VIII	1	1	1	1	1.2	1.2	1.2	1.2
Menlo Ventures VI	1	1	1	1	0.8	0.8	0.8	0.8
Hambrecht & Quist Venture Partners	1	1	1	1	0.4	0.4	0.4	0.4
Ray Partners IV	1	1	1	1	0.2	0.2	0.2	0.2

## Session Requirements

- ✓ Select a Navigation Method
- ✓ Financing Round Date Range: 01/01/93 to 12/31/96
- ✓ Portfolio Company Primary Industry: All Computer Hardware
- ✓ Portfolio Company State Region: Northeast
- ✓ Fund State: California
- ✓ Financing Round Total: Where Information is Available
- ✓ Execute search criteria
- ✓ Design a custom report
- ✓ **Select a standard report**

Save standard report output as an Excel spreadsheet

View custom report output

Exit SDC Platinum

## Step 10: Saving Report Output to a Spreadsheet

SDC displays your report output in Document window. From the Document window you can save your report to a text, Microsoft Excel, or Lotus 1-2-3 file. SDC adds the file name to the custom report request description on the Main Session window.

*Excel spreadsheet output*

1. From the Document menu, select Export/Save As to open the Save Output window.
2. Click on the Save File as type down arrow and select MS Excel.
3. In the File Name text box, type **NEComp2** and accept the .XLS extension.
4. Select a drive and directory if necessary.
5. Click on **OK**.

The system saves the data to the specified file and returns you to the Document window.

6. From the Document menu, click on Close to return to the Main Session window.

---

---

## Session Requirements

- ✓ Select a Navigation Method
- ✓ Financing Round Date Range: 01/01/93 to 12/31/96
- ✓ Portfolio Company Primary Industry: All Computer Hardware
- ✓ Portfolio Company State Region: Northeast
- ✓ Fund State: California
- ✓ Financing Round Total: Where Information is Available
- ✓ Execute search criteria
- ✓ Design a custom report
- ✓ Select a standard report
- ✓ **Save standard report output as an Excel spreadsheet**

View custom report output


Exit SDC Platinum

---

---

*View Custom Report*

## Step 11: Viewing Custom Report Output

1. From the Main Session window Request Description list box, highlight the request titled *Custom Report: NEComp1* and click on the **View** icon  on the **View** icon.  
SDC Platinum opens the Document window and displays your custom report. You can now print and/or save your custom report.
2. From the Document menu, click on **Close** to return to the Main Session window.

---

---

## Session Requirements

- ✓ Select a Navigation Method
- ✓ Financing Round Date Range: 01/01/93 to 12/31/96
- ✓ Portfolio Company Primary Industry: All Computer Hardware
- ✓ Portfolio Company State Region: Northeast
- ✓ Fund State: California
- ✓ Financing Round Total: Where Information is Available
- ✓ Execute search criteria
- ✓ Design a custom report
- ✓ Select a standard report
- ✓ Save standard report output as an Excel spreadsheet
- ✓ **View custom report output**

Exit SDC Platinum

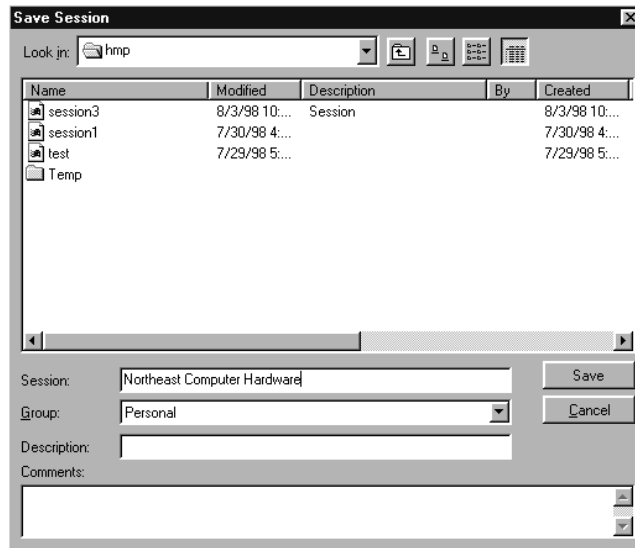
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*Exit SDC Platinum*

## Step 12: Exiting SDC Platinum

1. From the Main Session window Session menu, select **Exit**.
2. Click on **Yes** to save the session.
3. In the Save Session window Session Name text box, type **Northeast Computer Hardware**.
4. Click on **Save**.



---

## Session Requirements

- ✓ U.S. and Non-U.S. Targets
  - ✓ Date Range: 1996
  - ✓ Common/Ordinary Shares offered
  - ✓ Number of Consideration Types Offered 1
  - ✓ Total Fees Payable by Target and Acquirer
  - ✓ Value of Transaction to Sales Ratio
  - ✓ Value of Transaction to EBIT Ratio
  - ✓ Execute search criteria
  - ✓ Select a Financial Advisor Fees Report
  - ✓ Select a Multiples Report
  - ✓ Save the session
  - ✓ **Exit SDC Platinum**
-

# Helpful Utilities

---

## Logical Set Operations

You can use Boolean logic to do the following:

Union — Combine the results of two or more requests (OR)

Intersect — Find the common transactions in two or more requests (AND)

Difference — Subtract the transactions in one or more search requests from another (MINUS)

### To perform a Boolean logic operation:

1. From the Utilities menu, select Logical Set Operations.  
The Logical Set Operations window appears.
2. Drag the requests from the Main Session window Request Description list box to the Request # list box of the Logical Set Operations window.  
The request numbers appear in the Request # list box.  
Click on the **Union** option button to combine the results of two or more requests.  
**or**  
Click on the **Intersection** option button to find the common transactions in two or more requests.  
**or**  
Click on the **Difference** option button to subtract the transactions in one or more search requests from another.  
(Remember to enter the sequence numbers in the correct order.)
3. Click on **OK**.  
The Boolean request is added to the Request Description list box of the Main Session window.
4. **Execute** the requests.

---

## Top N Deals

SDC Platinum lets you identify the top deals in your search results, such as the top 10 Portfolio Companies by financing round amount or the top 25 Funds by fund size.

### To list the top deals:

1. From the Utilities menu, select Top N Deals.  
The Top N Deals window appears.
2. Click on an Item Description.  
**or**  
In the Item Code text box, type a code.
3. In the Top N Deals box, click on the up or down arrow to indicate the number of deals to select.
4. Click on a Select option button to indicate if you wish to include or ignore ties.
5. Click on **OK**.  
The request is added to the Request Description list box on the Main Session window.
6. **Execute** the requests.

---

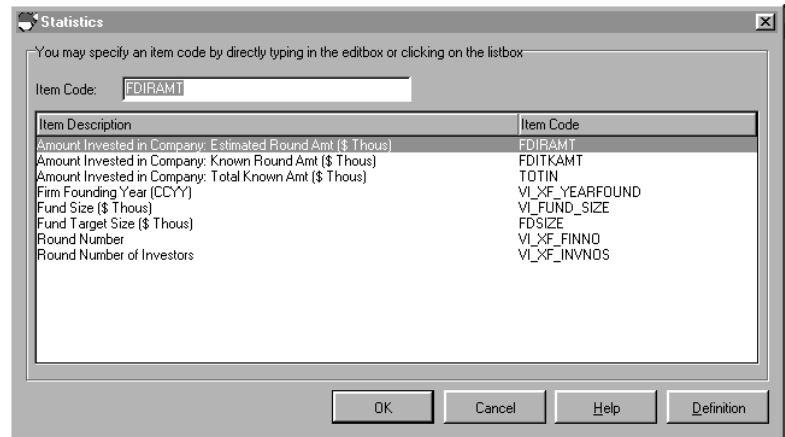
## Statistics

You can use the statistics feature to calculate aggregate data, such as the sum, minimum, average, maximum, and median, on your search results.

### To request statistics:

1. From the Utilities menu, select Statistics.

The Statistics window appears.



2. Click on an item code.

**or**

In the Item Code text box, type the **code**.

3. From the Statistics box, select Detailed or Overall.
4. Click on **OK**.

The request is added to the Request Description list box on the Main Session window.

5. **Execute** the requests.



---

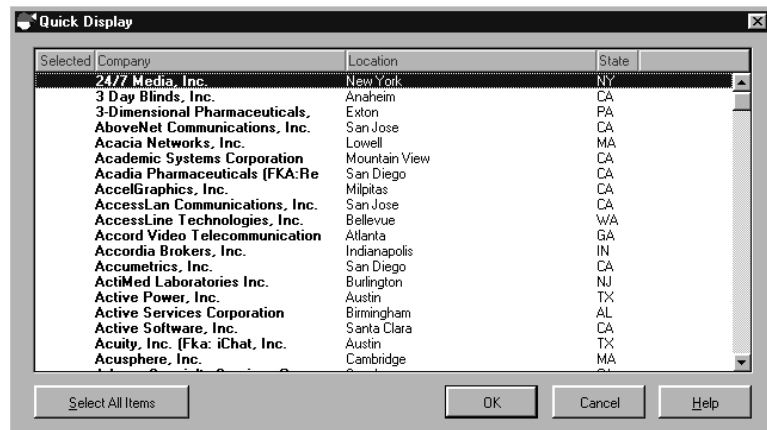
## Quick Display

The SDC Platinum Quick Display feature allows you to display and print a list of transactions for the current search result. You can select transactions to keep or exclude from your search result.

### To create a Quick List of transactions:

1. From the Utilities menu, select Quick Display.

The Executing Lookups window shows you the phase and number of matches. When the search is complete, the Quick Display window lists transactions for your request.



**Note:** The transactions are sorted by date. You can click on a column heading to sort the transactions by that heading. Click once to sort in ascending order; click again to sort in descending order.

2. Double-click on the transactions to keep or exclude.
3. Click on **OK**.
4. Click on **Keep** to keep only the selected transactions.

**or**

Click on **Exclude** to exclude the selected transactions.

The request is added to the Request Description list box on the Main Session window.


5. **Execute** the requests.

---

## Saving a Session

Saving a Session will save all the requests listed in the Request Description list box of the Main Session window. The requests can include search, report, and/or ranking criteria. After you save a session, you can load it whenever you wish. You can then modify any of the criteria listed in the Request Description list box.

### To save a new session:

1. Click on the Save tool .  
**or**  
From the Session menu, select Save As.  
The Save Session window appears.
2. Select the drive and directory where you wish to save the session.  
**or**  
Click on the Group down arrow, and select the group.
3. In the Session Name text box, type the name of the session.  
**Note:** You can use spaces in your session name.
4. Type a description and comments if you wish.
5. Click on **OK**.  
SDC Platinum saves the session.

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## Saving a Search Result

Saving a Search Result saves the results of the last executed search request. If the last request is a report or ranking request, SDC Platinum will find and save the last executed search request.

### To save search results:

1. Make sure you have executed your session.
2. From the Utilities menu, select Save Current Search Result.  
The Save Search Result window appears.
3. Select the drive and directory where you wish to save the search result.  
**or**  
Click on the Group down arrow, and select the group.
4. In the Search Result Name text box, type the name of the search result.  
**Note:** You can use spaces in your search result name.
5. Type a description and comments if you wish.
6. Click on **OK**.  
SDC Platinum saves the search result and returns to the Main Session window.
7. Execute the saved search result.

---

## Saving a Custom Report Format or Ranking Criteria

To save a custom report format or ranking criteria:

1. Create your custom report format and click on **OK**.

**or**

Create your custom ranking criteria and click on **OK**.

The Save Custom Report or Save Custom Rank window appears.

2. Select the drive and directory where you wish to save the custom report format or ranking criteria.

**or**

Click on the Group down arrow, and select the group.

3. In the Custom Report or Rank Name text box, type the name of the custom report format or ranking criteria.
4. Type a description and comments if you wish.
5. Click on **OK**.

SDC Platinum saves the custom report format or ranking criteria.

The Output Options window appears. You can format your report or ranking (e.g., add titles, search details, and summary statistics; sort data).

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## Saving and Loading a List of Selections

You can save groups of frequently used SIC codes, VE Industry Codes, CUSIPs, etc., for use in later searches. You can load and use the saved lists to search any SDC database.

*Important*

To create a list of selections, you must be in the specific window. For example, to create a list of Primary VE Industry Major codes, you must be in the Primary VE Industry Major codes window.

**To create a list of selections:**

1. From the Express Search Items window to open a pick list or company window.
2. Select the items to include in your list.
3. From the List Management menu, select Save Selections As List.

The Save List window appears.

4. Select the drive and directory where you wish to save the session.

**or**

Click on the Group down arrow, and select the group.

5. In the List Name text box, type the name of the list.
6. Type a description and comments if you wish.
7. Click on **OK**.


SDC Platinum saves the list.

8. Close the Pick List or Company Identifier window and the Express Search Items window.

---

## To load a saved list of selections:

1. Use the Express Search Items window to open the pick list or company window.
2. From the List Management menu, select Load Saved List.  
The Open List window appears.
3. Select the drive and directory that contain the list.  
**or**  
Click on the Group down arrow, and select the group.
4. In the Saved Lists of Selections list box, click on the list name.

**Note:** You can click on the toggle  icon next to the List Name text box to view summary information for the selected list.

5. Click on **OK**.  
SDC Platinum displays the list of selections in the Company Identifier or Pick List window.
6. Close the Pick List or Company Identifier window and the Express Search Items window.  
The request appears in the Request Description list box of the Main Session window.

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## Creating Your List of Favorite Data Items

You can use the All Items list to create a list of data items you use regularly. The data items then appear in the Express Search My Favorites tab. In addition, your SDC Platinum administrator can create a list of data items your company uses regularly.

### To create your list of favorite data items:

1. In the Express Search Items window, click on the All Items tab.
2. In the Find text box, type at least three characters of a data item or code and press **Enter**.

**Notes:** The characters can be anywhere in an item description or code. For example, if you type **year**, SDC Platinum displays all data items with the word **year** in the description, such as Company Founding Year and Firm Founding Year.

You can type more than one word in the Find text box (e.g., fund size) and select AND or OR. **AND** finds data items with all the words in them (e.g., all data items with "fund size"). **OR** finds data items with any one of the words in them (e.g., all data items with "fund" or with "size").

SDC Platinum displays a list of all data items containing the characters.

3. Scroll through the list and click on a data item.
4. Click on **Add Favorite**.  
The item is added to the Express Search Items window My Favorites tab.
5. Click on **Close**.

---

## Managing SDC Platinum Files

You can delete, move, or copy your saved SDC Platinum files from SDCTools File Manager, Windows 3.1 File Manager, or Windows 95 Explorer. The following table lists the SDC Files and their extensions:

<b>Extension</b>	<b>File Type</b>
ssh	Sessions
lst	Lists
rpt	Report formats
rnk	Rank formats
qrs	Search results



# Online Help

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## What's in Online Help?

You can use SDC Platinum online help to find information such as

- Complete descriptions of SDC databases
- Step-by-step instructions on how to perform specific tasks
- Answers to frequently asked "How can I ..." questions

From within many Help topics you can jump to related topics. Just click on the underlined text.

You can move, resize, maximize, or minimize the Help window, just like any other window. For details on how to use online help, click on the Help window **Help** button.

### **Sample Online Help Window**

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## Context-Sensitive Help

For context-sensitive help, press **F1** or click on the **Help** button in an SDC Platinum window.

*Context-Sensitive help example*

Open the database selection window and select a tab. Highlight a marketplace or product and press **F1**.

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## Copying Online Help Topics to the Clipboard

You can copy some or all of any help topic to the Windows Clipboard. You can then paste the text into another document such as Microsoft Word or Windows Notepad.

### To copy a Help topic to the Clipboard:

1. From the Help window Edit menu, select Copy.
2. Click on **Copy** to copy the entire topic to the Clipboard.  
**or**  
Or select the text you want to copy and click on **Copy**.
3. You can paste the text into another document.

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## Printing Online Help Topics

To print the current Help topic:

- From the Help window File menu, select Print Topic.

**Note:** You cannot print information from a pop-up window.