
Table of Contents

Chapter 1 - Getting Started	1
Built on the Solid Foundation of COMPUSTAT Data	2
COMPUSTAT Databases	2
Textual Databases	4
Selecting the Default Database	5
Choosing Default Styles.....	5
Where to Go When You Have Questions	7
On-Screen Help	7
Web site	7
Customer Support	7
Chapter 2 - Navigating Research Insight	9
Welcome to Reseach Insight Window	10
Reseach Insight Desktop	11
Reseach Assistant	12
Reseach Assistant - Step 1 Window	12
Reseach Assistant - Step 1 - Classic View Window	14
Reseach Assistant - Step 2 Window	15
Reseach Assistant - Step 3 Window	16
Rport Assistant.....	17
Rport Assistant - Step 1 Window.....	17
Rport Assistant - Step 2 Window.....	18
Rport Assistant - Step 3 Window.....	19
Rport Window.....	20
Chart Assistant.....	21
Chart Assistant - Step 1 Window.....	21
Chart Assistant - Step 2 Window.....	22
Chart Assistant - Step 3 Window.....	23
Chart Window	24

File Open Window	25
Run Assistant	26
Run Assistant - Screen	26
Run Assistant - Set	27
Run Assistant - Report Time Periods	28
Run Assistant - Screen - Classic View	29
Look Up List	30
Buttons.....	30
Look Up - Companies	31
Look Up - Items	32
Look Up - Functions	33
Look Up - Sets.....	34
Chapter 3 - Screening COMPUSTAT (North America) with the Research Assistant	35
Defining Screening Criteria and Viewing the Results of a Screen.....	36
Changing Your Initial Set and Defining Multiple Criteria and Ranges	38
Customizing Screening Criteria	40
Accessing the Classic View of a Screen	42
Exercises	44
Chapter 4 - Reports	49
Running a Company Highlights Report	50
Running a Pre-defined Report	51
Running a Pre-defined Report on Multiple Companies.....	52
Modifying a Pre-defined Report.....	53
Creating a Table Report	54
Sorting Columns in a Table Report	56
Creating an Historical Analysis Table Report.....	57
Selecting Time Periods	58
Creating a Free-Form Report.....	58
Exercises	61
Chapter 5 - Charts	69
Using Pre-defined Charts.....	70
Running a Pre-defined Chart for Multiple Companies.....	72
Modifying a Pre-defined Chart.....	73
Creating Your Own Charts	74
Chapter 6 - Customizing	77
Choosing or Changing Styles	78
Customizing Indicators and Item Sets.....	79
Importing/Exporting	81
Modifying Report Settings	82

Modifying Adjustment Factors	83
Modifying Data Code Settings	84
Modifying Current Period Cutoffs.....	84
Modifying Your Default Base Set	84
Chapter 7 - Using Formulas and Functions.....	85
Formulas in Research Insight	86
Formula Components.....	86
Functions	86
Items	87
Company References	87
Sets	87
Time Period References	88
Concepts	88
Formula Operators	89
Parentheses.....	89
Using Parentheses (), Brackets [], and Braces { }.....	89
Mathematical and Relational Operators	90
Adding "Wildcards" to Your Formula	90
Functions in Research Insight	91
The Parts of a Function	91
Currency Functions	91
Growth Functions.....	92
Historical Analysis Functions.....	93
Information Functions	93
Logical Functions.....	94
Mathematical Functions.....	94
Period Reference Functions	95
Reference Functions	95
Screening Functions	96
Set Analysis Functions	97
Statistical Functions.....	98
Text Functions	98
Database Control Functions	99
Chapter 8 - Current and Historical Data.....	101
Annual Periodicity.....	102
Fiscal Year Data.....	102
Calendar Year Data	102
Quarterly Periodicity	103
Fiscal Quarter Data	103
Monthly Periodicity	103
Daily Periodicity	103

Scalar Periodicity	103
The Current Period.....	104
Time Period References.....	106
Absolute Time Period References	106
Relative Time Period References	107
Calendar Time Period References.....	108

Importing Your Set	147
Importing Concepts Into Research Insight.....	149
Chapter 12 - COMPUSTAT (Global) Data	151
Changing Your Default Database.....	152
Content Unique to the Global Database	153
Glossary	155
Index	157