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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

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

Client Support and Contact Information

<table>
<thead>
<tr>
<th>Client Support phone number</th>
<th>973-622-5200</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Support fax</td>
<td>973-622-4701</td>
</tr>
<tr>
<td>Client Support E-mail</td>
<td><a href="mailto:sdehelp@tfn.com">sdehelp@tfn.com</a></td>
</tr>
<tr>
<td>Sales phone number</td>
<td>212-484-4701</td>
</tr>
<tr>
<td>SDC web site</td>
<td><a href="http://www.securitiesdata.com">www.securitiesdata.com</a></td>
</tr>
</tbody>
</table>
Getting Started

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".
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

<table>
<thead>
<tr>
<th>Database Selection</th>
<th>Mergers &amp; Acquisitions</th>
<th>Corporate Governance</th>
<th>Corporate Restructurings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Venture Debt</td>
<td>Securities Trading</td>
<td>Industry Specific</td>
<td>Global Public Finance</td>
</tr>
<tr>
<td>Official Database</td>
<td>Bonds</td>
<td></td>
<td></td>
</tr>
<tr>
<td>of the National</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Venture Capital</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Association</td>
<td>Liabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industry Statistics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fund</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Performance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Statistics</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Navigation Method Window

- Express Reports
- Search Menu
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

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

![Search Items Window](image-url)
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

<table>
<thead>
<tr>
<th>Company</th>
<th>Location</th>
<th>Phone</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abgenix, Inc.</td>
<td>Framingham, California 94523</td>
<td>620-609-6500</td>
<td>Bridge Loan</td>
</tr>
<tr>
<td>Adept Scientific, Inc.</td>
<td>West New York, Rhode Island 02903</td>
<td>406-220-0210</td>
<td>Bridge Loan</td>
</tr>
<tr>
<td>Adva Biosciences, Inc.</td>
<td>Marlboro, Pennsylvania 18514</td>
<td>406-220-0209</td>
<td>Expansion</td>
</tr>
<tr>
<td>Agenus, Inc.</td>
<td>Columbus, Ohio 43226</td>
<td>602-426-4033</td>
<td>Expansion</td>
</tr>
<tr>
<td>Allot Therapeutics, Inc.</td>
<td>Salt Lake City, Utah 84116</td>
<td>620-609-7412</td>
<td>Expansion</td>
</tr>
<tr>
<td>Allergan Pharmaceuticals, Inc.</td>
<td>Bridgewater, New Jersey 08807</td>
<td>602-609-7412</td>
<td>Expansion</td>
</tr>
<tr>
<td>Arcturus Pharmaceuticals Corporation</td>
<td>Marlboro, Pennsylvania 18514</td>
<td>602-609-2204</td>
<td>First Stage</td>
</tr>
<tr>
<td>ArqCorp, Inc.</td>
<td>San Francisco, California 94107</td>
<td>415-706-2100</td>
<td>Expansion</td>
</tr>
<tr>
<td>Aurora BioSciences Corporation</td>
<td>Chicago, Illinois 60611</td>
<td>415-419-2500</td>
<td>Expansion</td>
</tr>
<tr>
<td>Avant Corporation</td>
<td>Lexington, Massachusetts 01758</td>
<td>415-419-2500</td>
<td>Public: IPO 06/28/96</td>
</tr>
<tr>
<td>Axion Corp.</td>
<td>Mountain View, California 94043</td>
<td>415-819-4300</td>
<td>Public: IPO 11/03/96</td>
</tr>
<tr>
<td>BioChem, Inc.</td>
<td>Santa Clara, California 95050</td>
<td>415-819-4300</td>
<td>Public: IPO 11/03/96</td>
</tr>
</tbody>
</table>
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.

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 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.

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 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)**.

3. Click on **OK**.

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

**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.

### 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 4: 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.

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 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

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.

### 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 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

1. From the Document window, click on the Print icon [printer]
   **Hint:** To display a report from the Main Session window, highlight an executed report request, and click on the View icon [view]

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.

---

**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

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

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

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

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
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**.

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 2: Selecting a Private Equity Fund Type

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

![Private Equity Fund Type dialog box]

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

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 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.

---

### 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 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**

   ![Report Output Options](image)

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.

![Report Output for Request 4](image)

---

**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 *Benchmark* 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

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.

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.

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

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Round Date</th>
<th>Round Number</th>
<th>Total Round Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrated Corporation</td>
<td>08/14/95</td>
<td>1</td>
<td>$437,000</td>
</tr>
<tr>
<td>SilTech, Inc.</td>
<td>10/02/95</td>
<td>2</td>
<td>$500,000</td>
</tr>
<tr>
<td>Norandes Corp.</td>
<td>07/15/95</td>
<td>1</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Artisan Systems Corporation</td>
<td>08/10/96</td>
<td>1</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Ferratek Systems</td>
<td>07/10/94</td>
<td>1</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Findus Corporation</td>
<td>09/01/93</td>
<td>1</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Freeling Network, Inc.</td>
<td>04/12/96</td>
<td>1</td>
<td>$800,000</td>
</tr>
<tr>
<td>Elvis Corporation</td>
<td>06/04/95</td>
<td>1</td>
<td>$1,000,000</td>
</tr>
<tr>
<td>Silverware Corporation</td>
<td>07/10/94</td>
<td>3</td>
<td>$2,000,000</td>
</tr>
</tbody>
</table>

Excel Spreadsheet: Output of the sample session showing the list of companies and their investment details.
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
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.
3. Click on OK to continue to the Search Items 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 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
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
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.

### 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 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.

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.

---

### 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
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.

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
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.

   The Keep or Exclude window appears.

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.
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).
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.
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:

<table>
<thead>
<tr>
<th>Extension</th>
<th>File Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>ssh</td>
<td>Sessions</td>
</tr>
<tr>
<td>lst</td>
<td>Lists</td>
</tr>
<tr>
<td>rpt</td>
<td>Report formats</td>
</tr>
<tr>
<td>rnk</td>
<td>Rank formats</td>
</tr>
<tr>
<td>qrs</td>
<td>Search results</td>
</tr>
</tbody>
</table>
Online Help

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
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**.

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.

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.