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1.0. Introduction

Oriana is a comprehensive database that contains financial information on close to 1 million public and private companies in 30 countries in the Asia-Pacific region and Middle East. Oriana combines data from various information providers (IPs), each of which brings local expertise to the information it provides.

The Oriana database is exclusive to BvDEP and its IPs and is not available through any other medium. BvDEP identifies the best source of information in each country and applies strict inclusion criteria to prevent any bias in coverage. The information is provided in a harmonised format to facilitate realistic cross-border searching and analysis. A standard company report includes: 23 balance sheet items, 25 profit and loss account items and 26 ratios, descriptive information including trade description and activity codes (NACE 1, NAICS or US SIC can be used across the database), security and price data, ownership information (researched by BvDEP’s own team of consultants), Reuters’ news and market reports.

Each company is part of a default peer group based on its activity codes; integral graphs and a specific report demonstrate its position in this peer group. A company tree diagram instantly illustrates the structure of the group.

The software allows full manipulation and analysis of the data, and the information can be downloaded into other packages for further work and presentations.

1.1. System Requirements

In order to use Oriana, you will need the following:

- Windows 2000, XP or Vista
- Minimum screen resolution of 1024 x 768
- Access to the Internet using Internet Explorer 6.0 or Netscape 8.0, Firefox 1.5 or higher.
- A username and a password provided by Bureau van Dijk Electronic Publishing.

1.2. Software overview

Over 100 search criteria can be combined using Boolean criteria to clearly identify the company set on which information will be displayed (reports) or that will be used for analysis (statistical analysis, peer reports, segmentations, etc.).

Data than can be displayed, exported, sent by e-mails or printed in customised lists or reports formats.
2.0. Getting started

2.1. Home page

2.1.1 Overview

Oriana's home page is the first screen that you access when accessing the application. It allows access to a variety of search option to query the database, load previously saved or unsaved searches as well run a series of analyses on the currently selected companies.

Home page

At the top of screen is displayed Oriana's tool-bar. This tool-bar is not specific to any screen or module and is always available. It allows you to run a quick one-step search and access a variety of core functions. See Permanent tool-bar for more details.

The home page is composed of three main elements, outlined hereunder.

2.1.2 Advanced search tool-box

The advanced search options provides you with multiple search criteria allowing you to accurately find and retrieve companies

Advanced search

The advanced search is composed of tabs and sub-tabs.
2.1.2.1 Search tab
Under the Search tab you may access all the available search criteria. The Search tab has two sub-tabs:

- **Grouped view**: unless you specify otherwise (see 'Defining your default home page' for more details) you are presented with the Grouped view of search criteria. The grouped view organises the different available search criteria by logical category. See 'Working with the grouped view of search criteria' for more details.

- **Alphabetical list**: the alphabetical list tab presents all the available search criteria in an alphabetical list. See 'Working with the alphabetical list of search criteria' for more details.

2.1.2.2 Saved searches tab
Under the saved searches tab are listed all your previously saved search strategies and company sets. From this tab you may load a previously saved search, delete a previously saved search or add/remove a saved search to your favorites.

See 'Working with your saved searches' for more details.

2.1.2.3 Favorites tab
Under the favorites tab are listed all the saved searches that you added as a favorite. You may create directories and sub-directories in order to organise and place favorite searches.

See 'Working with your favorite searches' for more details.

2.1.2.4 History tab
Under the history tab are listed all the searches you ran regardless of whether you saved them or not. Your history is organised by time period so you can easily find and access them according to whether you ran the search today, yesterday, two days ago, etc. You may load an unsaved search by clicking on it from this screen.

See 'Working with your search history' for more details.
2.1.3 Search side menu

The search side-menu contains a variety of links and menus allowing you to view the list of results, trash and create a new search as well as run a series of analyses on the currently selected companies.

**Search side menu**

You may hide the side menu in order to maximize your working space by clicking on the **Hide** button.

The other options are defined hereunder

<table>
<thead>
<tr>
<th>Option</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Go to list of results</strong>:</td>
<td>View the list of results</td>
</tr>
<tr>
<td><strong>New search</strong>:</td>
<td>Trash your current search and start a new search</td>
</tr>
<tr>
<td><strong>Modify current search</strong>:</td>
<td>Nothing</td>
</tr>
<tr>
<td><strong>Segmentation</strong>:</td>
<td>Run a segmentation analysis on the currently selected companies</td>
</tr>
<tr>
<td><strong>Peer analysis</strong>:</td>
<td>Run a peer analysis on the currently selected companies</td>
</tr>
<tr>
<td><strong>Aggregation</strong>:</td>
<td>Run an aggregation analysis on the currently selected companies</td>
</tr>
<tr>
<td><strong>Concentration analysis</strong>:</td>
<td>Run a concentration analysis on the currently selected companies</td>
</tr>
<tr>
<td><strong>Statistical distribution</strong>:</td>
<td>Run a statistical distribution analysis on the currently selected companies</td>
</tr>
<tr>
<td><strong>Linear regression</strong>:</td>
<td>Run a linear regression analysis on the currently selected companies</td>
</tr>
</tbody>
</table>
2.1.4 **Search strategy tool-box**

The search strategy tool-box lists all the search steps that you specified and allows you to:
modify a search step, save a search, delete one or all search steps, ignore a search step and more importantly, if you have more than one search step, build complex search strategies using boolean operators.

See [Search strategy tool-box](#) for more details.

**Notes:**
- The search strategy tool-box is only displayed if you specified at least one search step.
- You may access this home page at any time by clicking on the navigation breadcrumbs displayed at the top left of any screen.
- By default you are presented with the grouped view of search criteria. Your default home page may be customised. See [Defining your default home page](#) for more details.

### 2.2. Permanent tool-bar

At the top of any screen available in Oriana are displayed a number of features and options accessible at any time when you are working.

- The edit-box allows you to run a quick one-step search according to a variety of criteria. See [Quick search](#) for more details.
- To the right of the tool-bar are displayed a number buttons and menus defined below:

<table>
<thead>
<tr>
<th>Button / Menu item</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Alerts</strong></td>
<td>Hover over this option to expand the alerts menu items allowing you view and manage your list of alerts, define your alert settings and manage your list of recipients through the address book.</td>
</tr>
<tr>
<td><strong>Settings</strong></td>
<td>Click on this button to access your user setting to fine-tune your preferences and manage your saved searches, layouts, reports, etc.</td>
</tr>
<tr>
<td><strong>Help</strong></td>
<td>Hover over this option to expand the help menu items allowing you to access end-user documentation, list of tips of the, coverage tables, download of the Web Add-in, etc...</td>
</tr>
<tr>
<td><strong>Contact us</strong></td>
<td>Click on this button to access a screen allowing to provide product feed-back and submit technical questions to BvDEP.</td>
</tr>
<tr>
<td><strong>Log out</strong></td>
<td>End your current session and log-out of Oriana</td>
</tr>
</tbody>
</table>
2.3. Defining your default home page

By default, when you access Oriana’s Home page you are presented with the grouped view of search criteria. You may change this default home page to:

- The alphabetical list of search criteria
- Your saved searches
- Your favorites
- Your search history

To do so, go to the screen you wish to set as your default home page and activate the option Default home page. By doing so, each time you access the home page, you are presented with that tab.

2.4. Navigating

Navigation between the different screens and modules is very easy and intuitive. In addition to the different clearly labeled buttons and links, the following navigational features are available:

- At the top-left of each page, bread-crumbs are displayed allowing you to trace back the different operations you did. Click on a bread-crumb to go to that page (e.g. click on Home to return to the home page to access another database).

  🏛 Home > List > Report (Standard report)

- You may freely use the Back button on your browser to return to the previous screen you were working from (e.g. modify your search criteria when viewing the list of results).
3.0. Search

3.1. Quick search

**Accessing:** the Quick search is accessible from any screen you are working from in the permanent tool-bar.

The quick search allows you to search Oriana in one easy step according to a selection of criteria.

1. Click on to expand the available search criteria
2. Select one of the available search criteria.
3. Type in one or more words in the provided text box:
   - The search is matched on the beginning of words (i.e. sun finds suntan, Sunday, etc.)
   - You may use the Boolean operators AND, OR, AND NOT between the different chains of characters you enter. The default operator used when you include a space between two chains of characters is AND. If you include a comma between two chains of characters, it is considered as an OR. To include the operator AND NOT, you need to type it in.
   - To retrieve companies matching exactly the text you enter, put the text in between quotation marks.
4. Click on to activate the search and view the list of companies complying with the criteria.

**Notes:**
- For more search options use the Grouped view or the Alphabetical list of search criteria.
- If you previously ran or loaded a search, you lose your previous search results.

3.2. Working with the grouped view of search criteria

**Accessing:** go Oriana’s Home page, click on the Search tab and then click on the Grouped view sub-tab

The grouped view of search criteria organises the different available search criteria by logical category for easy access.

**Grouped view of search criteria**
1. To access a search screen and specify a search step, either:
   - If there is no sub-criteria, click on the search criteria.
   - If you see a displayed, hover over the option to expand to the category and click on the criteria.

2. After you complete a search step, you return to the home page and your search step is displayed in the search strategy tool-box.

3. When you return to the home page, you may:
   - Add another search step from the grouped view or the alphabetical list.
   - View your list of search results by clicking on the button **View list of results** from the search strategy tool-bar or the menu item **Go to list of results** from the search side-menu.
   - Save your search by clicking on the **Save** button from the search strategy tool-box.
   - Run some analyses on the selected companies from the search side-menu.

### 3.3. Working with the alphabetical list of search criteria

**Accessing**: go Oriana’s Home page, click on the **Search** tab and then click on the **Alphabetical list** sub-tab.

The alphabetical list tab presents all the available search criteria in an alphabetical list.

**Alphabetical list of criteria**
1. Scroll down the list or use the shortcuts displayed above the list to find the search criterion by which you wish to search.

2. Click on the search criterion to access the search screen and specify your search step.

3. After you complete a search step, you return to the home page and your search step is displayed in the search strategy tool-box.

4. From there on, you may:
   - Add another search step from the grouped view or the alphabetical list
   - View your list of search results by clicking on the button View list of results from the search strategy tool-bar or the menu item Go to list of results from the search side-menu.
   - Save your search by clicking on the Save button from the search strategy tool-box
   - Run some analyses on the selected companies from the search side-menu

3.4. Working with your saved searches

Accessing: go to Oriana's Home page, click on the Saved searches tab

Under the saved searches tab are listed all your previously saved searches. From this tab you may load a previously saved search, delete a previously saved search or add/remove a saved search to your favorites.

Saved searches
Your saved searches are presented with the following columns of information:

- **Name** - this is the name you gave when saving the search.
- **Date** - this is the date and time when you saved your search.
- **Type** - two type of saved searches are available: *Search strategy* and *Identifiers*.

### 3.4.1 Load a saved search

To load a search, click on the name of the saved search. The search will be launched immediately and you will be displayed with the list of results.

You may also load a search saved on a local or networked disk click clicking on the **Load from disk** button. The following dialog is displayed allowing you to specify the path and file name to load or browse for it:

![Load from disk dialog](image)

### 3.4.2 Delete a saved search

- To delete a previously saved search click on the **X** icon corresponding to the search you wish to delete.
- To delete ALL your previously saved searches click on the **X** icon displayed in the column header.

### 3.4.3 Add/remove a saved search to your favorites

- To add a saved search to your favorites, click on the **.star** corresponding to the search you wish to add.
- To remove saved search previously added to your favorites, click on the **star** corresponding to the search you wish to remove.

### 3.4.4 Sorting the list of saved searches

By default, your saved searches are sorted by name in alphabetical order (from A to Z). The arrows displayed in the columns headers indicate how the list is sorted:

- **▲**: indicates the list is sorted according to that column in ascending order
3.5. Working with your favorite searches

Accessing: go to Oriana’s Home page, click on the **Favorites** tab

Under the favorites tab are listed all the saved searches that you added as a favorite. You may load a search, create directories in order to organise your favorites as well as remove a favorite search or directory.

**Favorites**

![Image of Oriana's Favorites page]

### 3.5.1 Loading a search

To load a search that you added in your favorites, simply click on the name of your search. You will be displayed with the list of results.

### 3.5.2 Organising your favorites

Organising your favorites is easy and intuitive. You may create directories with custom labels and place your favorites in them by dragging and dropping them on the directory. You may also simply reorder order your favorites by dragging and dropping in the position you wish.

To create a new directory:

1. Click on the button labelled **New directory**. The screen refreshes with a newly created directory.
2. In the edit-box, type in the label you wish to give to this directory and press **Enter** on your keyboard.

At any time you may rename a directory by clicking on the label and rendering it editable.

### 3.5.3 Removing a favorite search or directory

- To remove a favorite search, click on the icon corresponding to the favorite search you wish to remove. Note that removing a favorite search does not delete the search from your saved searches. You may re-include the search in your favorites from your list of saved searches.
- To remove a directory,
  1. Click on the icon corresponding to the directory you wish to delete.
2. A dialog pop-up asking you if you would like to remove the directory and all favorite searches included in the directory or just the directory

![Delete a favorite folder]

**What do you want to delete?**
- The folder 'My Ownership searches' and its content
- The folder 'My Ownership searches' only

> Cancel  OK

3. Click on the radio button corresponding to the option you wish to select and click on the OK button.

You may also remove the full list of favorites and all directories in one operation by clicking on the button labelled **Remove all favorites from the list.**

### 3.6. Working with your search history

Under the history tab are listed all the searches you ran regardless of whether you saved them or not, organised by time period so you can easily find and access them according to whether you ran the search today, yesterday, two days ago, etc. You may load an unsaved search by clicking on it from this screen.

**Search history**

- [x] Delete all history
  - [ ] Today (0)
  - [ ] Yesterday (0)
  - [ ] Two days ago (0)
  - [ ] Three days ago (0)
  - [ ] Four days ago (0)
  - [ ] Five days ago (1)
  - [ ] Six days ago (0)
  - [ ] More than one week (0)
  - [ ] More than two weeks (1)

• You may save a search by clicking on the icon corresponding to the item you wish to save.

• You may delete an item in your history by clicking on the icon corresponding to the item you wish to delete. To delete your full search history click in the button labelled **Delete all history.**
4.0. Managing your search

4.1. Search strategy tool-box

Accessing: After specifying at least one search criteria or loading a search, the search strategy tool-bar is accessible from the Home page or the List.

The search strategy tool-box lists all the search steps that you specified and allows you to: modify a search step, save a search, delete one or all search steps, ignore a search step and more importantly, if you have more than one search step, build complex search strategies using boolean operators.

- The number displayed next to each search step corresponds to the number of companies the search step has selected (aka "step result")
- The total number of companies selected is displayed underneath (in the example above, this number is 48). The total number of companies selected results from the combination of all search step. This number depends on the Boolean expression specified in the Boolean search edit-box.

4.1.1 Working with search steps

- To modify a search step, click on the search step you wish to modify. The search screen is displayed allowing to modify the search step criteria.
- To ignore a search step, without actually deleting the step from your search strategy, deactivate the check-box corresponding to the search step you wish to ignore. Once you deactivate a search step is greyed out and the Boolean expression is automatically amended.
  
  Note: you may ignore a search step by deleting the search step from the Boolean search edit-box and clicking on the Refresh button.

- To delete a search step, click on the corresponding to the search step you wish to delete.

4.1.2 Search strategy tool-bar

The icons/link displayed in the tool-bar are defined below:

<table>
<thead>
<tr>
<th>Icon / Link</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Save]</td>
<td>Save your search</td>
</tr>
<tr>
<td>![Clear all steps]</td>
<td>Delete all search steps currently specified</td>
</tr>
</tbody>
</table>

Note: from the list, the search strategy tool-bar contains an extra item labelled 'Add a search step' allowing to return to the home page to add a search step.
4.2. Save a search

Accessing: from search strategy or List tool-bar click on the Save icon

Save a search screen

4.2.1 Procedure

1. Oriana offers two options to save a search:
   - **Save the search strategy** (default option): if you select this option you are not saving the actual companies selected by your search strategy, but the different search steps that you specified and the **Boolean expression** used to combined them. When you select this option, each time you load this search, the number of companies may change as the database is updated.
   - **Save the companies ID**: if you select this option you are saving the list of identification numbers that uniquely identify each company currently included in your list of results. This means that when you load this search, the same companies will always be included in your search results. Note that if you marked companies in your list of results, only those will be saved.

2. Give a name to your search in the provided text box (or keep the default one).

3. Click on one of the two following icons:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Save icon]</td>
<td>Save the search to the application server. The name of the saved search will be listed under your saved searches. If a search with that name already exists, a warning message asking you if you would like to replace it or save the report under a new name.</td>
</tr>
<tr>
<td>![Save icon]</td>
<td>Save the search to a local or network drive.</td>
</tr>
</tbody>
</table>

4.2.2 Other functions

4.2.2.1 Load or delete a previously saved search

If you have previously saved a search to the application server, your previously saved searches are displayed at the top of the screen:

- Click on the name of a search to load it
- Click on the ![Delete icon] to delete the search.

4.2.2.2 Add search file to alert system

Activate the option **Include this file in your alerts** before clicking on the save icon to add the file to your alerts.
4.3. Boolean Searching

**Accessing:** boolean searching is possible if you specify at least two search steps from the Search Strategy toolbar available from the Home page or the List.

Boolean searching is an intuitive way to combine search steps when searching by more than one criterion.

Oriana allows you to conduct any number of search steps, one after the other using different criteria. As each search step is performed it is linked to the preceding search steps with either:

- The "AND" operator (most of the search criteria):
  This means that companies selected in the current search step are compared with those in the preceding ones and only company records satisfying all steps are selected.
  **Example:** 1 And 2 And 3 And 4

- The "FROM" operator: (if you do a search by "Top", available in searches based on financials and number of employees):
  This means that the current search step is "taken from" of the company set resulting from your previous search steps. This search step will always be positioned before all others and parentheses are automatically inputted.
  **Example:** 4 From (1 And 2 And 3)

You may modify how the different search steps are combined to one another as well as exclude one or more of them from the search strategy, by appending the boolean expression from the provided edit-box. You may change the order of execution of the different steps as well as modify the Boolean operators (FROM, AND, AND NOT, OR). You may also include parenthesis in order to specify which part of the boolean expression needs to be executed first.

The priority order of execution of a boolean expression is as follows:

1. Expression included in parenthesis
2. From
3. AND / AND NOT
4. OR

**Tip:** When you have more than two search steps and use more than one different type of Boolean operators, it is highly recommended to use parenthesis in order to insure that the companies selected by the boolean expression specified are indeed the ones you intended to select.
5.0. List of results

Accessing:
- Execute a quick search, or
- Execute a search step from the grouped view or alphabetical list of criteria and click on View list of results or Go to list of results, or
- Load a search from your saved searches, favorites or search history and click on View list of results or Go to list of results.

5.1. Working with a list of companies

The list of results displays all the companies that comply with criteria you specified in the search module in a list format.

Each line contains the name of the company along with a number of columns containing the value of a variable. If this is the first time you access a list of results or have not specified otherwise you are presented with the Standard list.

To access a company reports, click on the name of the company you wish to view.

To the left of each company name, are displayed:
- The occurrence of the company according to how the list is sorted. The occurrence number is used to specify the company or companies you would like to consider when exporting, printing etc.
- A check-box allowing to mark the company. Marking companies is very useful to indicate which company wish to you delete or keep, export or not export, etc.

5.1.1 Working with the columns of a list

You may work on the columns displayed directly from the list:
- You may change the order of the columns by clicking on a column header and dragging it to the desired position
- Resize the width of a column by clicking on a column border and dragging it to the desired width
- Delete a column by clicking on the \( \times \) icon in the corresponding column header
List of results

- You may sort the list of companies according to any variable where you see a symbol in the column header. The list is sorted according to the column displayed with a darker grey (indicates ascending, indicates descending).

To change the columns that are displayed in the list, go to the Customise the list page by clicking on the Add link in the header of the last column.

### 5.2. List tool-bar

The list tool-bar, displayed at the top of the list of results, includes a number of icons and controls summarized hereunder:

<table>
<thead>
<tr>
<th>Icon / Control</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Columns</td>
<td>Add or remove columns from the list.</td>
</tr>
<tr>
<td>Alert</td>
<td>Set up scheduled email alerts for all or some of the companies included in the list.</td>
</tr>
<tr>
<td>Export</td>
<td>Export the information as displayed in the list or the report of all companies, all marked/unmarked companies or range of companies to an external file (Excel, PDF, Word, etc)</td>
</tr>
<tr>
<td>Send</td>
<td>Export and send by email the information as displayed in the list or the report of all companies, all marked/unmarked companies or range of companies to an external file (Excel, PDF, Word, etc).</td>
</tr>
<tr>
<td>Print</td>
<td>Print out the information as displayed in the list or the report of all companies, all marked/unmarked companies or range of companies to an external file (Excel, PDF, Word, etc).</td>
</tr>
<tr>
<td>Page</td>
<td>Jump to first page</td>
</tr>
<tr>
<td>Page</td>
<td>Go to previous page</td>
</tr>
<tr>
<td>Page</td>
<td>Enter a page number in the text box and hit the return key on your keyboard to jump to that page</td>
</tr>
<tr>
<td>Page</td>
<td>Go to next page</td>
</tr>
<tr>
<td>Page</td>
<td>Jump to last page.</td>
</tr>
</tbody>
</table>
5.3. List side-menu

The list side-menu contains a variety of links and menus allowing you to view the list of results, trash and create a new search as well as run a series of analyses on the currently selected companies.

**List side menu**

You may hide the side menu in order to maximize your working space by clicking on the **Hide** button.

The other options are defined hereunder

<table>
<thead>
<tr>
<th><strong>Option</strong></th>
<th><strong>Action:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Back to search</strong></td>
<td>Return to the <a href="#">home page</a></td>
</tr>
<tr>
<td><strong>New search</strong></td>
<td>Trash your current search and start a new search from the <a href="#">home page</a></td>
</tr>
<tr>
<td><strong>Modify current search</strong></td>
<td>Return to the <a href="#">home page</a> to add search steps or modify a current search step</td>
</tr>
<tr>
<td><strong>List format</strong></td>
<td>Create a new list format from scratch or load a predefined or previously saved list format</td>
</tr>
<tr>
<td><strong>Segmentation</strong></td>
<td>Run a <a href="#">segmentation analysis</a> on the currently selected companies</td>
</tr>
<tr>
<td><strong>Peer analysis</strong></td>
<td>Run a <a href="#">peer analysis</a> on the currently selected companies</td>
</tr>
<tr>
<td><strong>Aggregation</strong></td>
<td>Run an <a href="#">aggregation analysis</a> on the currently selected companies</td>
</tr>
<tr>
<td><strong>Concentration analysis</strong></td>
<td>Run a <a href="#">concentration analysis</a> on the currently selected companies</td>
</tr>
<tr>
<td><strong>Statistical distribution</strong></td>
<td>Run a <a href="#">statistical distribution analysis</a> on the currently selected companies</td>
</tr>
<tr>
<td><strong>Linear regression</strong></td>
<td>Run a linear regression analysis on the currently selected companies</td>
</tr>
</tbody>
</table>
6.0. Company reports

Access: to access a company report, click on a company name from the list of results after having specified some search criteria or loaded a search.

6.1. Overview

The report module is composed of three main elements:

- The company report composed of report sections.
- The report tool-bar
- The report lateral menu

Company report example

6.2. Report sections

A company report is a collection of independent information sections incorporating a wide range of detailed data and information on a subject company. A report section may include tabular data or charts illustrating tabular data.

The first section of any report is a section containing signature information on the company. This section is called the "header" and includes a variety of core company information. This section is special as it cannot be removed.

Report sections included in a report, and how they appear, is entirely up to you. You may display a single predefined report section or create a new report format by selecting any number of sections you wish to include in the report (as well as decide the order in which you would like them to appear). Such report formats may be saved and loaded for future re-use.

Many of the available predefined sections (such as ownership sections, sections providing financial data, charts, etc.) allow further display or layout options. The options available intrinsically depend on the section. They include for example the possibility to define the columns (years) of data you wish display, the units and currency in which you wish to express financial data, and much more.
Furthermore, you may create your own customised section. Customised sections allow you to incorporate data and information available from one or more predefined sections in one single section. You may create your own labels for these items as well as create new items based on a formula. These customised sections may be saved for future re-use.

6.2.1 Report section tool-bar

At the top-right of each section the following icons are available:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Action</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>-</td>
<td>Collapse the section to hide the contents of the section.</td>
<td>After the section is collapsed, you may expand it by clicking on +.</td>
</tr>
<tr>
<td>☐</td>
<td>Open/maximise the section in a new browser window. From this new window, you may then export, send or print the section individually.</td>
<td>Double clicking within the heading of a section also opens the section in a new window.</td>
</tr>
<tr>
<td>☑</td>
<td>Remove the section from report.</td>
<td></td>
</tr>
</tbody>
</table>

In addition to the icons, many sections also include the link Options or Layout, allowing you to edit the display options of the section.

6.3. Report tool-bar

The report toolbar, displayed at the top of each report, includes buttons and links allowing you to navigate from one company report to another, return to the list of results, export, etc ...

<table>
<thead>
<tr>
<th>Icon / Link</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sections</td>
<td>Format the report</td>
</tr>
<tr>
<td>Alert</td>
<td>Set an alert on the company</td>
</tr>
<tr>
<td>Export</td>
<td>Export one or more company reports</td>
</tr>
<tr>
<td>Send</td>
<td>Export and send one or more company reports to a selection of recipients by email</td>
</tr>
<tr>
<td>Print</td>
<td>Print out the report of one or more companies</td>
</tr>
<tr>
<td>Previous</td>
<td>Display the report of the first company (according to how the list is sorted)</td>
</tr>
<tr>
<td>1 of xx</td>
<td>Display the previous company report (according to how the list is sorted)</td>
</tr>
<tr>
<td>companies</td>
<td>Enter the occurrence number of the company and hit the Enter key on your keyboard to jump to that company report</td>
</tr>
<tr>
<td>Next</td>
<td>View next company report (according to how the list is sorted)</td>
</tr>
<tr>
<td></td>
<td>Display the report of the first company (according to how the list is sorted)</td>
</tr>
</tbody>
</table>
6.4. Report lateral menu

To the left or right of the report is displayed the following menu:

6.4.1 Back to the list of results

Use this link to return to the list of results.

6.4.2 Search

Use the menu items to either start a New search (you will lose your current search results) or Modify current search.

6.4.3 Define the format

A report format is defined by a collection of report sections selected for the report (and the sequence in which they appear).

Hover over the Report format menu item to expand the following menu of options:
Create/modify format:
The items under this heading allow you to create a new report format (New format) or modify the current report format (Add/remove sections).

Display a predefined format:
Click on one of the predefined report formats to display it.

Display a saved format:
Click on one of your previously saved formats to display it. Note that this category is empty if you have not previously saved a report format.

6.4.4 Display a specific section
The options under this section of the lateral menu allow you to:

Display a specific report section:
- Click on the section you would like to display
- Items with a > expand into report sections (i.e. they are not sections but categories).
- Create a new customised section or load a previously saved customised section.

Note: This lateral menu may be hidden by clicking on Hide.
6.5. Report formats

**Access:**
- From the company report lateral menu, expand the Report format menu item and select **New report** or **Add/remove section**, or
- Click on **Add / remove sections** from the report tool-bar.

6.5.1 Overview

The *Customise the report* dialog allows you to:
- Create a new report format
- Modify a report format
- Save a report format
- Load a previously saved or predefined report format
- Delete a previously saved report format
- Define the default report

**Format the report dialog**

![Format the report dialog](image)

*Note:* if you selected the option **Add/remove section**, the report sections currently selected for display in the report are listed under 'Your selection'

6.5.2 Create a new report format

Under *Your possibilities* are listed all the report sections that you may add the report format. These sections are organised by category.

1. Adding sections:
   - To add a single section:
     a. Click on the category in which the section is included to expand it.
     b. Click on the section to add to the report. The report section is then displayed under *Your selection*.!
To add a group of sections:
   a. Click on the icon corresponding to the category you wish to add.
   b. All the section contained in that category are then displayed under **Your selection**.

2. After having added all the desired sections, you may:
   - Remove a previously selected section by deactivating the check-box corresponding to that section in **Your selection**.
   - Change the order in which the sections will appear in the report by clicking on a section's name under **Your selection** and dragging it to the desired position.

3. Many sections offer a variety display options. Click on the link **Display options** corresponding to the section you wish to edit.

4. Click on the **OK** button to view the report.

**Note:** By default report formats will not be saved meaning that when you start a new session of Oriana your modifications will be lost. See **Save a report format** below.

### 6.5.3 Modify a report format

To modify a previously saved report format or predefined report, click on the icon corresponding to the report you wish to modify.

Follow the instructions above to add/remove sections or reorder them.

### 6.5.4 Save a report format

1. Type in the name you would like to give to the report format from the **Give a name** text box. Note that you cannot specify the same as a predefined report (e.g. Standard report).

2. Click on one of the following icons:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Save to server]</td>
<td>Save the report format to the application server. The name of the saved report will be listed under you saved reports. If a report with that name already exists, a warning message asking you if you would like to replace it or save the report under a new name.</td>
</tr>
<tr>
<td>![Save to disk]</td>
<td>Save the report format to a local or network drive (.txt extension file).</td>
</tr>
</tbody>
</table>

### 6.5.5 Load a previously saved or predefined report

- To load a report previously saved on the application server or a predefined report click on the report you wish to load from the left side of the screen.

- To load a report saved on a local or networked disk click on the link **Load from disk**. The following dialog is displayed allowing you to specify the path and file name to load or browse for it:

  ![Load a file from disk](image)

  **Enter the complete path and file name or click on "Browse" to search for it:**

  ![Browse button](image)

  ![Cancel and OK buttons](image)
After having successfully loaded a report, you are displayed with the report.

6.5.6 **Delete a previously saved report format**

To delete a customised report that you previously saved on the application server, click on the corresponding icon.

6.5.7 **Define the default report**

The default report is the report used by default when viewing a company report at each new session of Oriana. Unless you specify otherwise it is the Standard report that is considered as the default report.

You may change this default behaviour by activating the check-box corresponding to the report format (predefined or previously saved) that you wish to use by default. By doing this, it will be the report that you marked that will always be used by default when viewing a company report at each new session.

⚠️ **Note**: the report that is displayed by default in an open session, is the last report that was displayed (also known as the current report).
7.0. Analyses

7.1. Segmentation

The Segmentation analysis can be performed on any number of companies, breaking-down the group of companies according to up to two variables. The two variables are defined by a primary and secondary variable such as industry, location, a financial variable etc. You may also choose to use user defined variables as primary and/or secondary variables.

The results of the analysis can be viewed in a segmentation table as well as illustrated with a bar chart or a pie chart.

The primary use of the analysis is to allow you to target and characterise sub-groups of companies according to two variables, such as industry and profit margin or any other pair of relevant variables.

Segmentation analyses are fully customisable to meet your needs:

- You may choose what the number displayed in each class (the descriptive variable) is to represent. By default it represents the number of companies comprised in the class but you may choose other variable (such as aggregate number of employees, aggregate profit & loss etc.) in which case the number in each cell represents the sum of the selected variable's value for all the companies in a class. You may also choose to display figures in each cell as a percentage of the total of the line, column or total with or without penetrations indices.

- You may choose the classes to use for each variable from a list of predefined standard/default classes. Standard and default classes can then be modified by changing the thresholds, deleting or adding a class, inserting subtotals or rendering a class invisible.

7.2. Peer Analysis

The peer analysis is a benchmarking tool enabling you to compare a group of companies against one another as well as against some summary statistics of the group of companies.

The group of companies in which each company is compared to one another is composed of each company currently selected from the list of results. The distinction between a peer analysis and a peer report is that the peer report (available from the company report side menu) compares a subject company to a predefined peer group (defined by a proximity variable, year and/or industry) whereas a peer analysis enables you to fully customise the composition of the group companies you wish to compare to one another and include a subject company. Moreover, the peer report is considered as a section of a company report whereas a peer analysis is independent of any company report.

The comparison can be based on any variable available from any financial section of the company report for any of the available years.

The results of the peer analysis can viewed in a table and illustrated with a variety of charts and graphs:

- Bar chart
- Pie chart
- Lorenz curve
- Distribution chart
- Indices chart
- Quantile chart
Analyses

**Note:** you may run this analysis on maximum 500 companies

### 7.3. Aggregation

The aggregation analysis allows you to sum up, year by year, the lines of the accounts of each company selected from the list of results.

The results of the analysis presents you with one final virtual company's yearly account statement.

The aggregated account can be illustrated with four different types of graphs:

- Structure of the balance sheet
- Structure of the P&L account
- Bar chart
- Evolution of several variables in indices

**Notes:**
- You may run this analysis on maximum 500 companies.
- When viewing the aggregated accounts, the number of companies included in the accounts varies from year to year due to the fact that not all accounts included in your selected company group have the same availability. So when viewing and comparing the evolution of a variable through time, you need to take into account that there are not the same number of observations and that therefore the results may be biased.

### 7.4. Statistical distribution

The statistical distribution analysis allows you to analyse how a specific variable is distributed in a group of companies selected from the list of results.

The results of the analysis are presented in a table displaying summary statistics such as the median, the average, the standard deviation, etc. The results may also be illustrated with a distribution chart.

**Note:** you may run this analysis on maximum 500 companies.
8.0. Exporting

8.1. Working with the export system

8.1.1 Overview

Oriana includes an integrated and dedicated system allowing you to export, to a selection of different file formats, lists, company reports, peer reports, analyses, graphs and more.

Whenever you can export data displayed on your screen you will see the two following icons displayed on the upper right hand side of section in which the data is included:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export</td>
<td>Use this button to display the export settings dialog and export the data to a predefined format</td>
</tr>
<tr>
<td>Send</td>
<td>Use this button if, on top of exporting the data to a predefined file format, you wish to send the file to a selection recipients by email</td>
</tr>
</tbody>
</table>

In order to not hinder the performance of the application, most exports are not processed on the server hosting the application but on a dedicated, independent server. Each time you execute an export you are sending a request to this dedicated server to begin the export process.

In real terms, this means that you can continue working normally and do not have to wait for your requested export to be processed.

8.1.2 Limitations

Because at any one time there can potentially be a large amount of requests, a certain number of limitations have been implemented in order to optimise the performance of the dedicated export servers:

- Each dedicated server can process a maximum number of simultaneous exports. This number depends on the application you are using.
- At any one time, the application under use can only send one request per user to the dedicated export server. Hence if you request two consecutive exports in a short time period, your first request will be processed immediately while the other will pend until the first one is successfully processed. If for technical reasons, the subsequent file cannot be processed after a specific laps of time, a message is displayed informing you that the export cannot be immediately processed and that you will be notified by email when it is ready.

When your export is finished you can then download it to your hard drive or on to your local network.

8.1.2.1 Specific limitations when exporting a list of results

1. In order to minimise potential performance problems on the dedicated export servers, a limit in terms of the amount of data you can export in one go has been set. This limit is determined by a formula that takes into account the number of companies, the nature and the number of variables you are exporting.

   If the list you are exporting exceeds this preset limit, a message is displayed asking you to refine your selection.

2. An Excel spreadsheet is limited to 255 columns, 65 536 lines and 32 768 characters per cell. If your list exceeds any of these thresholds, a message is displayed recommending you to select another export format.
8.1.2.2 Specific limitations when exporting a company report

1. When exporting the company report currently displayed on your screen, it is executed directly by the server hosting the application. This means that you have to wait for the export to be fully processed before continuing your work. Also these exports are not listed under the "My Exports" in your custom settings.

2. You can export a maximum of 50 company reports in one go.

3. If you export to Excel, you are not limited to 65 536 lines. If your report exceeds this limit, the excess lines of the report will be included in a new excel spreadsheet.

4. Exporting the subsidiary section on several level or the Corporate Group section is only possible for a single company (Current company).

8.2. Export formats

BvDEP offers a variety of formats to which data can be exported. These formats depend on the module from which you wish to export the data:

<table>
<thead>
<tr>
<th>Module</th>
<th>Available export formats</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Excel (*.xls, *.xlsx)</td>
</tr>
<tr>
<td></td>
<td>Text (Tab delimited) (*.txt)</td>
</tr>
<tr>
<td></td>
<td>XML</td>
</tr>
<tr>
<td></td>
<td>Adobe Acrobat PDF (*.pdf)</td>
</tr>
<tr>
<td>List</td>
<td>![ ]</td>
</tr>
<tr>
<td>Reports</td>
<td>![ ]</td>
</tr>
<tr>
<td>Analyses</td>
<td>![ ]</td>
</tr>
</tbody>
</table>

8.2.1 Which export format is more appropriate?

8.2.1.1 Excel (*.xls)

Advantages:

- Ability to contain and organise data in a structured manner.
- Supports graphics.

Disadvantages:

- The main disadvantage is that you cannot export a large amount of data to an Excel spreadsheet due to the inherent limitations of Excel: an Excel spreadsheet is limited to 255 columns, 65 536 lines and 32 768 characters per cell.

Conclusion:

- It is an ideal format if you are exporting a medium amount of data and would like to further process the data in order to integrate the data to a larger database or format the data for presentation purposes.
- It is an inappropriate format if you exporting a large amount of data. If you are exporting a list with over 253 variables and/or 65 535 companies you should consider exporting to a text file.
8.2.1.2 Text (tab delimited) (*.txt)

**Advantages:**
- No limitations in terms of the amount of data it can contain.

**Disadvantages:**
- Does not support graphics.
- Data contained is unstructured and therefore needs to be further processed in order to be usable

**Conclusions**
- It is an ideal format if you are exporting a large amount of raw data that you wish to process at a later stage with applications such as Excel, Access or any other Database Management System.
- It is inappropriate if you are exporting the data for presentation purposes or if you wish to export to data that will be directly usable without further processing.

Note: exports to text files are encoded in UTF-16 meaning that double-byte characters are supported (special characters, Russian characters, Chinese etc.)

8.2.1.3 Adobe Acrobat PDF (*.pdf)

**Advantages:**
- Supports graphics

**Disadvantages:**
- Supports a limited amount of data
- Data cannot be further processed.

**Conclusions**
- This is an ideal format if you are exporting a limited amount of data and are including graphics for presentation purposes.
- It is inappropriate if you wish to further process the data or which to integrate the data in a larger database.
8.3. Exporting from the list of results

**Accessing:** click on Export available in list tool-bar.

**8.3.1 Overview**

The export function from the list of results page allows you to either:

- Export the information as displayed in the list companies
- Export the sections of information from the report of companies in the list.

Prior to accessing this dialog, you may mark companies by activating their corresponding check-boxes in order to specify which companies you wish to include or exclude in the export. You may then choose to export the information of all companies, all marked/unmarked companies or a range of companies to a selection of different **file formats**.

**Export dialog**

![Export dialog interface](image)
8.3.2 Procedure

1. Select the information you wish to export:
   a. List of companies (default option):
      Keep this option selected if you wish to export the information of companies as displayed in your list (i.e. the items of each company selected in your current list layout).
      - Activate the option Include the search summary to include the different search steps specified to produce the list of companies in the export file.
      - Choose how you would like to process multi-valued fields in the exported file. You may choose to export the value of each multi-valued field to a distinct cell (default option) or to include them all in one cell (and hence keeping one line per company line). In the prior option you may additionally choose to repeat single data items.

         Note: keeping one line per company is only available for exports to Excel. Repeating single data items is only available for exports to Excel and text files.

   b. The companies' report:
      Select this option to export sections of information contained in the report of the selected companies for the export. If you select this option, you can only select a maximum of 100 companies for the export and cannot export the Corporate Group or the subsidiaries section with 3 levels or more.
      - Select the report format:
         By default, the report(s) of company(ies) you wish to export will include the sections as defined in your Current report, i.e. the last report format you defined. Use the drop-down text-box to select another report format (predefined or previously created and saved) You may also directly create a new report format by clicking on View / Modify.

      - Export each company to a separate file:
         By default, all the reports will be exported to a single file. Activate this option if you wish to export each company report to a distinct file.

2. Select the companies you wish to export:
   - All companies:
      Select this option to export the information of all companies currently included in the list. If there are more than 100 companies in the list and you selected to export the reports of the selected companies, you need to choose one of the other available options.
   - The marked companies:
      Select this option to export all companies currently marked in the list. This option is only available if you have previously marked at least one company.
   - The unmarked companies:
      Select this option to export all companies currently unmarked in the list. This option is only available if you have previously marked at least one company.
   - The companies from:
      Select this option to export a range of companies. The numbers that you enter correspond to the position of the companies according to how the list is sorted.

Notes:
- The options marked companies and unmarked companies are only available if you previously marked companies.
- Some options may be unavailable due to limitations regarding the export of a list or limitations regarding the export of reports.
3. Select the format of the file to which you wish to export:
   - If you are exporting a list you may export to an Excel spreadsheet, a text file or an XML file.
   - If you are exporting one or more reports, you may export to an Excel spreadsheet or a PDF file.

For more information on the different available formats, see "Export formats".

4. Choose your name for the file to be exported. A default name is given to each exported file. We recommend you to give each file a distinctive name that characterises the content of the file so you can easily find it in the future.

5. Click on OK to confirm your settings and start the export process.

**Tips:**
- If you wish to export a large number of companies, mark all those you do not wish to export before accessing this dialog. Inversely, if you wish to export a limited amount of companies, mark all those you wish to export.
- If you wish to export all companies with a value for a certain variable above, inferior or within a certain threshold, sort your list according to that variable, identify the occurrence(s) of the companies outranking your threshold and export the range.
8.4. Exporting from a company report

**Access:**
- Click on [Export] available in report tool-bar to export all the report sections currently displayed and included in the report format.
- Maximise a report section and then click on [Export] from the new window to export a single report section.

8.4.1 Overview

The export function from a company report allows you to export to a selection of file formats the report section(s) currently displayed of the current company, all companies, all marked/unmarked companies or of a range of companies. Also note that you may export a single report section by maximising it in a new window and exporting that section from the new window.

The different option available from the export dialog depends on the report sections currently included in your report format.

There are extra options if you have the ownership tree, M&A deals, news or the subsidiary section included in the report.

**Note:** The companies that you previously marked from the list are maintained in the report.

![Export Parameters Dialog]

- **Select the companies you wish to export:**
  - Current company
  - All companies
  - The marked companies
  - The unmarked companies
  - The companies from: [ ] to: [ ]

- **Options:**
  - Export each company to a separate file.

- **Select a format:**
  - Excel (*.xls)
  - Adobe Acrobat PDF (*.pdf)

- **Choose a name for the file to be exported:**
  - BVDEP_Export_1

[OK, Cancel Buttons]
8.4.2 Basic export

1. Select the companies you wish to export:
   
   - **Current company:** Select this option if you wish to export the report of the company currently displayed in your screen.
   
   - **The marked companies:** Select this option to only export the companies that you previously marked from your list or from the report.
   
   - **The unmarked companies:** Select this option to only export the companies that you did not previously mark.
   
   - **The companies from:** Select this option to export a range of companies. The numbers that you enter correspond to the position of the companies according to how the list is sorted.

   **Notes:**
   - The options marked companies and unmarked companies are only available if you previously marked companies.
   - Some options may be unavailable due to limitations regarding the export of reports.

2. Select the format of the file to which you wish to export: when exporting a company report, you may export to an Excel spreadsheet or a PDF file. For more information on the different available formats, see "Export formats".

3. Choose your name for the file to be exported: a default name is given to each exported file. We recommend you to give each file a distinctive name that characterises the content of the file so you can easily find it in the future.