

Library Resource Guide

What is Mergent Online?

Mergent Online is a library subscribed corporate financial database providing information on U.S. and international companies. *Mergent* includes annual reports, news, "as reported" financial statements with footnotes, and SEC (EDGAR) filings. Enhanced features include company screening, multiple company report creation and historical financial data retrieval.

When Should You Use Mergent Online?

When you need:

- Full-text financial filings for U.S. or international companies, 1995-present;
- Up to 15 years of spreadsheet-ready financials;
- Searchable access to SEC (EDGAR) filings;
- The ability to create customized reports where you can specify the companies included, the time period, the data, the currency, and output format;
- Information on a company's joint ventures, subsidiaries, debt structure, and more.

To Connect to Mergent Online

1. Go to the *Management Library web page*, available at: www.library.cornell.edu/johnson.
2. In the **Top Business Databases** pull-down menu, scroll down to and click *Mergent Online*.

Need More Help?

Reference help is available in the library, via e-mail (mgtref@cornell.edu) or by telephone: 255-3389.

Search Options

Mergent Online provides several different ways to search for information. *Basic Search* (Sample Search #1) provides preformatted company profiles, while *Advanced Search* allows you to screen for companies meeting selected criteria and create custom reports (Sample Search #4). In addition, *Edgar Search* allows you to search SEC filings (Sample Search #5) and *Industry Reports* allows you to retrieve reports from selected industries in selected regions. There is also a *Country Profile* option located outside the search box on the basic search screen. Click the desired country from the pull-down menu.

Sample Search #1

Locate Company Financials

Find the company details report for Montana Mills.

1. On the home page, click **Enter Mergent Online**. Click **Basic Search**. Select *Company Name*. Type **Montana Mills** in the search box. Click **Search**.
2. If you are comparing several companies, click the **Add** button to begin a *Company Analysis* list (more on this option in Sample Search #3). Otherwise, click the **company name** in the search results list. The *Company Details/Synopsis* screen is then displayed. Other menu tabs include *Joint Ventures*, *Subsidiaries*, *Long Term Debt*, *History*, etc.
3. Click **Company Financials** to view *Annual Balance* sheets as reported. The report can be amended using the pull-down menus by time, section, currency, and scale. Click **Refresh** to amend the report.

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Sample Search #2 Create Custom Reports

View an international company's annual balance sheet for the past 10 years, converted to U.S. dollars.

1. Click **Basic Search**. Select *Company Name*. Type **Nestle** in the search box. Click **Search**.
2. A list of companies containing the name *Nestle* appears. Click **Nestle (Malaysia) Berhad**.
3. Click **Create Reports**. *Custom Reporting* lets you build a report based on selected criteria. In the *Financial Statements* window under **Types of Financials**, check *Balance Sheet*.
4. Set scroll-down boxes to the following: (1) **As Reported**, (2) **Annuals**, (3) **US dollars**, (4) **Last ten years/quarters**. Click **Add Item**.
5. Click **Create Company Report**. Choose format to download. Click **Create Report**.

Sample Search #3 Multi-Company Analysis

Create a Comparison Report or Multiple Company Report for Montana Mills and Kraft Foods Inc.

1. Add both companies to the *Company Analysis List* as described in Sample Search #1.
2. Click **Expand** in the **Company Analysis List** box in the upper right corner of the screen.
3. Click either **Create Multiple Company Report** or **Create Comparison Report**.
 - *Multiple Country Reports* are multi-company versions of the report in Sample Search #2.
 - *Comparison Reports* allow customized comparisons of your companies on specific data. Select a **category** and **sub-category**, click **Add Report Item** and click **Create Report**.

Sample Search #4 Advanced Search

Identify U.S. companies in the amusement park industry.

1. Click **Advanced Search**.
2. In *box 1* in the *Category* pull-down menu, click **Industry Codes**. Click **Any NAICS** under *Sub-category* (NAICS stands for North American Industry Classification System). In *box 2*, bullet **Equal to**.
3. In *box 3* under **Set Value**, type **713110**. This is the NAIC for Amusement Parks. If you don't know the NAIC for your industry, click **NAICS Lookup**. In *box 4*, click **Add Criterion**. Click **Search**.
4. Click **Add** for companies you wish to include in a *Multiple Company Report* (Sample Search 2) or a *Comparison Report* (Sample Search 3).

Sample Search #5 Use EDGAR to Find Company Filings

Find the most recent 10-K for Pixar.

1. Click the **Edgar Search** tab.
2. Select **Company Name** and type **Pixar** in the box.
3. In the *Filing Date Search* box, click **Last Twelve Months**. In the *Filing Type* box, select **10-K**.
4. Click **Search**.

Viewing, Printing and Downloading Instructions

Printing and downloading directions are attached to all reports. Format choices are indicated. Annual report PDFs are in color (for black and white reports smaller in file size, use **Thomson Research**).