Chapter 5
Adding Segments and Issues

With Standard & Poor's Research Insight, you can add geographic segments to a new company that you have added to the database, modify the business segments for an existing company and add market data for a secondary stock issue of any Research Insight company.

This chapter covers

- adding a business segment to a company

- adding a geographic segment to a company

- adding a secondary stock issue to an existing company

- restoring and delete segments

Adding a Business Segment to a Company

A business segment is a division, subsidiary or other part of a company that reports financial results, such as sales, operating income and assets. Many companies report basic financial information by operating segments in the notes to their financial statements. You can add up to ten business segments for a single company per year.

The following example illustrates how to add two segments to XYZ Company. Follow the same basic procedures to edit segment information for any Research Insight company.

Adding a Business Segment

Begin from the Research Insight desktop:

1. From the **Databases** menu, select **Company to** display the Company Definition dialog box.
2. Enter **XYZ** in the **Tic/Cusip** field.

3. Click the **Edit** button to activate the fields in the Company Definition dialog box.
4. Click the **Business** button to display the Business Segment dialog box.

5. Enter a **1** in the **SID** field.
   This number is the Segment Identification Number.

6. Click the **Edit** button.
   Research Insight checks to see if the segment already exists. You will see a message asking if you want to add the business segment.

7. Click **OK**.
   This activates all of the fields in the Business Segment dialog box.

8. Enter a name for the segment in the **Name** field.
   By default Research Insight repeats the SID in the **Name** field if no name is entered.

9. Click the **Accept** button.

10. To add a second segment, repeat steps 5 through 9.

The next step is to add values for segment data items such as Sales, Operating Income and Assets. You can add data manually, calculate the data or import data from an ASCII file.

Adding Business Segment Data Manually

Begin from the Research Insight desktop:

1. From the **Databases** menu, select **View/Modify Data** to display the View/Modify Data dialog box.

2. Enter a segment data item mnemonic in the **Item** field.
   For example, the mnemonic for Sales Net Business Segment is SALES. Other key segment data items include:

Name	Mnemonic
Operating Profit	OPS
Identifiable Assets	IAS
Sic Codes	SICS

   For a complete list of segment data items, click the **Look Up** button and select the **Business Segment** item category.

3. Enter a company ticker in the **Companies** field.

4. Click the **View** button. If you added more than one segment, you will see the Segment List dialog box. Otherwise, you will see the Company Data dialog box.

5.   **OK** to add SALES values for the first segment.
         The Company Data dialog box displays.
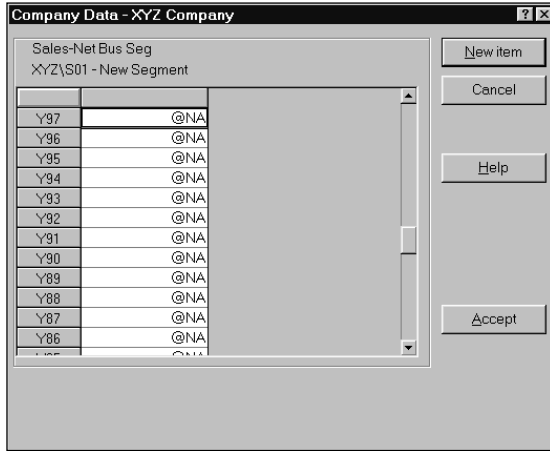
6.nter data values for all the time periods for which you have data.
7.   **Accept** button.
8.   **New Item** button to return to the View/Modify Data dialog box.
         At this point, you can add another item to the first segment of your company, or add the
         same item to the second segment of your company. Let's add the same item to another
         segment.
9.   **View** button.
         The Segment List dialog box displays again.
10.Newegment2), and click   **OK**.
         The Company Data dialog box displays for the item you selected for the second segment of
         your company.
11.nter data values for all the time periods for which you have data.
12.   **Accept** button.

Calculating or Importing Data Values

Instead of manually entering data, you may want to have Research Insight calculate values from
existing items, concepts and values in Research Insight. For a complete explanation of
calculating data values, refer to Chapter 3 - Editing and Assigning Data Values.

Another option is to import segment data from an ASCII file. For a complete explanation, refer
to Chapter 12 - Importing and Downloading of the *Getting Started* manual.

Adding a Geographic Segment to a Company

As with business segment data, many companies report basic financial information by geographic operating units in the notes to their financial statements. With Research Insight, you can add up to five geographic segments for a single company per year.

The following example illustrates how to add two geographic segments to XYZ Company. Follow the same basic procedures to edit geographic segment information for any Research Insight company.

Begin from the Research Insight desktop:

1. From the **Databases** menu, select **Company** to display the Company Definition dialog box.

2. Enter **XYZ** in the **Tic/Cusip** field.

3. Click the **Edit** button to activate the fields in the Company Definition dialog box.

4. Click the **Geographic** button to display the Geographic Segment dialog box.

5. Enter a **1** in the **GID** field. This is the Geographic Segment Identification Number.

6. Click the **Edit** button. You will see a message asking if you want to add the segment to the database.

7. Click **OK** to activate the fields in the Geographic Segment dialog box.
   At this point, you can add Area Codes to the segment identifying the countries and regions where the operations are located. Research Insight allows for up to five codes for each segment. Although theses codes are useful, they are not required. To see a list of the codes, click the **Description** button in the Geographic Segment dialog box.
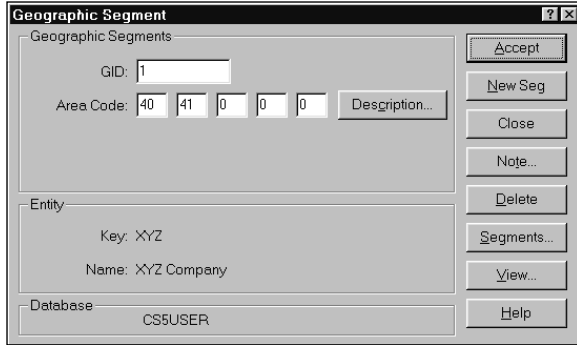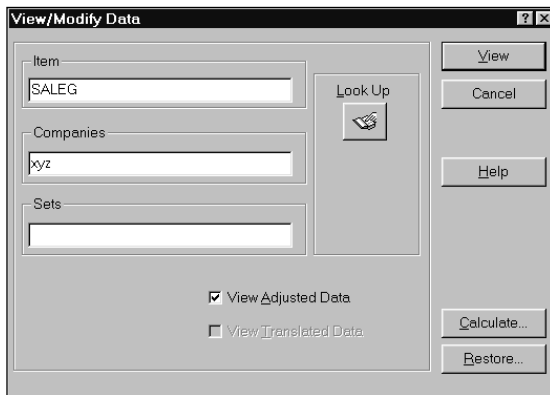
8. Click the **Accept** button.
9. To add a second segment, repeat steps 5 through 8.

Now you are ready to add values for geographic data items such as Sales, Operating Income and Assets.

Adding Geographic Segment Data Manually

Begin from the Research Insight desktop:

1. From the **Databases** menu, select **View/Modify Data** to display the View/Modify Data dialog box.

2. Enter a geographic segment data item mnemonic in the **Item** field.

   For example, the mnemonic for Sales-Net Geographic Segment is SALEG. Other key segment data items include the following:

Name	Mnemonic
Operating Profit	OPG
Identifiable Assets	IAG

   To find a list of additional geographic segment data items, click the **Look Up** button and select the **Geographic Segment** category.

3. Enter a company ticker in the **Companies** field.
4. Click the **View** button. If you added one geographic segment. proceed to Step 5. If you added more than one segment, the Geographic List dialog box will open.

5. Click **OK** to add SALEG values for the first segment.
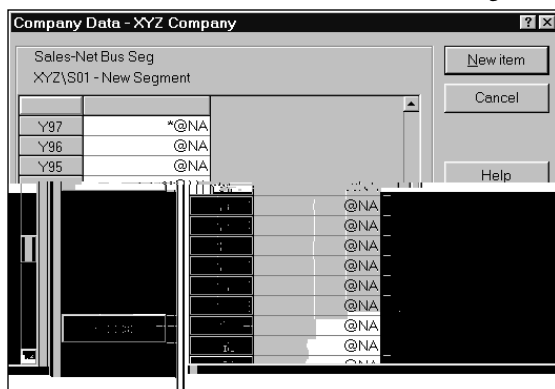
6. Enter your data values for the time periods for which you have data.
7. Once you are finished, click the **Accept** button.
8. Click the **New Item** button to return to the View/Modify Data dialog box.
    At this point, you can add another item to the first geographic segment of your company, or add the same item to the second segment of your company. We'll add the same item to the second segment.
9. Click the **View** button.
    The Geographic List dialog box displays again.
10. Click the second segment, and click **OK**.
    You'll see the Company Data dialog box for the item you have selected for the second segment of your company.
11. Enter your data values for the time periods for which you have data.
12. Once you are finished, click the **Accept** button.
13. Click the **New** Item button to return to the View/Modify Data dialog box, or close the dialog box if you are finished adding segment data.

Calculating Data Values

As a second approach to entering geographic segment data into Research Insight, you can calculate values for an item from existing items, concepts and values in Research Insight. For a complete explanation of calculating data values, refer to Chapter 3 - Editing and Assigning Data Values.

Importing Data into Research Insight

The third approach to entering geographic segment data into Research Insight is importing data from an ASCII file. Refer to Chapter 3 - Editing and Assigning Data Values, or for a complete explanation refer to Chapter 12 - Importing and Downloading of the *Getting Started* manual.

Adding a Stock Issue to a Company

The issue segment represents a stock issue for a company in the database. The issue segment contains a company's market data, such as daily price information.

With Research Insight, you can add an issue segment for a company that you have added, or add secondary stock issues for any Research Insight company.

The following procedures take you through the steps of adding a second issue segment to IBM.

Begin from the Research Insight desktop:
1. From the **Databases** menu, select **Company**.
    The Company Definition dialog box displays.
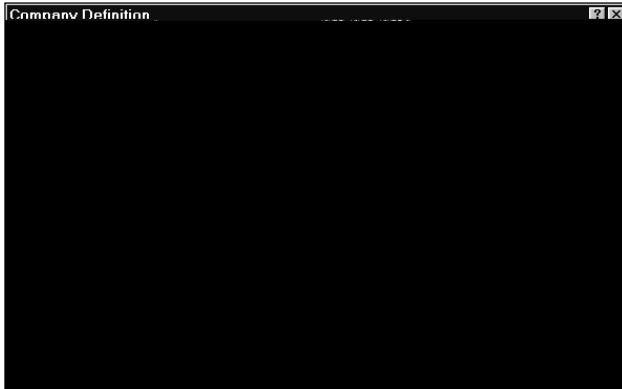
2. Enter a ticker symbol in the **Tic/Cusip** field.
3. Click the **Edit** button.
    All of the fields in the Company Definition dialog box are now activated.

4. Click the **Issue** button to display the Issue dialog box.

Issue		? ☒
Issue		Accept
IID:	2	New Issue
Name:	New Issue	Close
		Note...
		Delete
Entity		Issues...
Key:	IBM	View...
Name:	INTL BUSINESS MACHINES CORP	
Database	S&USER	Help

5. Enter **2** in the **IID** field. (Most Research Insight companies will already have a **1** issue.) This number is the Issue Identification Number.
6. Click the **Edit** button.
    Research Insight checks to see if the segment already exists. If it doesn't exist, you are asked if you want to add it.
7. Click **OK**.
    All of the fields in the Issue dialog box are now activated.
8. Enter a descriptive name for the issue in the **Name** field.
9. Click **Accept**.
10. To add another issue, repeat steps 5 through 9.

Adding Data to Your Issue Segment

Once you have added an issue segment to a company, the next logical step is to add values for issue data items such as Prices, Shares Traded and Total Return Factors. Research Insight provides you with three ways of doing this: adding data manually, calculating data and importing data from an ASCII file.

Adding Data Manually

Begin from the Research Insight desktop:
1. From the **Databases** menu, select **View/Modify Data**.
   The View/Modify Data dialog box appears.
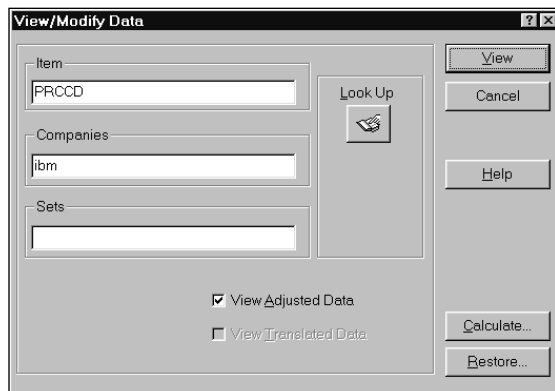
Note: You must de-select the **View Adjusted** field if you are modifying an adjusted item such as price, shares, etc. For Global subscribers, you must de-select the **View Translated** field if you are modifying any item.

2. Enter an issue data item mnemonic in the **Item** field.
   For example, the mnemonic for Price-Close Daily is PRCCD. Other key issue data items include the following:

Name	Mnemonic
Total Return Factor-Daily	TRFD
Price - High Daily	PRCHD
Price - Low Daily	PRCLD

3. Enter a company ticker in the **Companies** field.
4. Click the **View** button.

The Issue List dialog box displays.
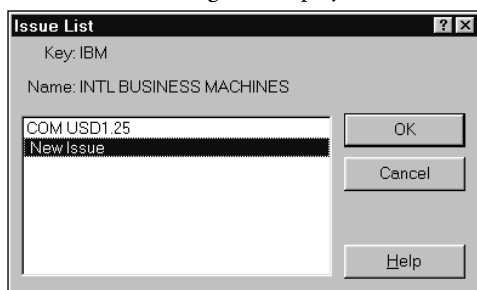
5. Select the issue you want and click **OK**.
   The Company Data dialog box displays for your company.
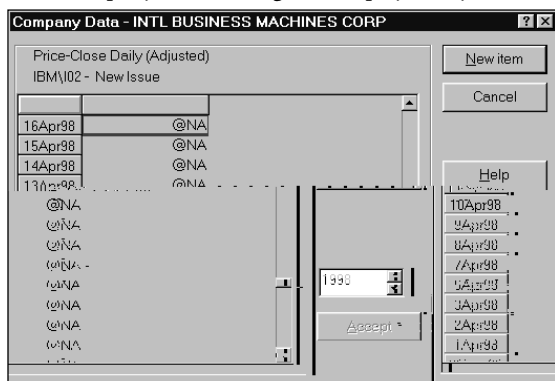
6. Enter your data values for the periods that you have data.
7. Once you are finished, click the **Accept** button.
8. Click the **New Item** button to return to the Company data dialog box, or close the dialog box if you are finished adding data to the issue.

Calculating Data Values

As a second approach to entering issue data into Research Insight, you can calculate values from existing items, concepts and values in Research Insight. For a complete explanation of calculating data values, refer to Chapter 3 - Editing and Assigning Data Values.

Importing Data into Research Insight

The third approach to entering issue segment data into Research Insight is Importing. The Importing feature allows you to incorporate data into Research Insight from an ASCII file. For a complete explanation, refer to Chapter 12 - Importing and Downloading, of the *Getting Started* manual.

Restoring and Deleting Segments

If you have changed or added a business, geographic or issue segment for a company, you can restore the company to its original formor the form in which it appears on the core database.

If you have added a business, geographic or issue segment for a company, you can delete it along with all of its associated data values.

The following procedures take you through the steps of deleting a secondary issue segment previously added to IBM. Follow the same basic procedures for deleting user-added business and geographic segments.

Begin from the Research Insight desktop:
1. From the **Databases** menu, select **Company**.
   The Company Definition dialog box appears.
2. Enter the ticker for the company you want to restore in the **Tic/Cusip** field.
3. Click the **Edit** button.
   All of the fields in the Company Definition dialog box are activated.

9. Click the **Issues** button.
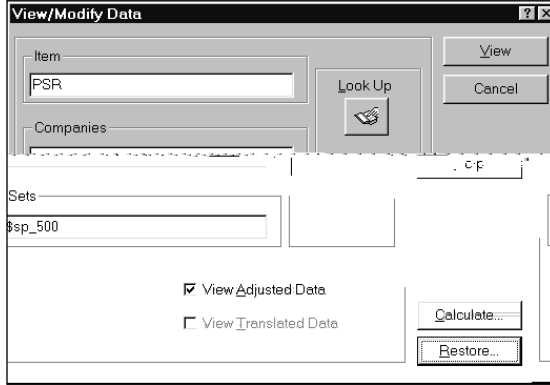   The Issue List dialog box appears.

Restoring and Deleting Segment Data

If you have edited or changed a value for a data item, you can restore it to its original form or the value contained on the core database.
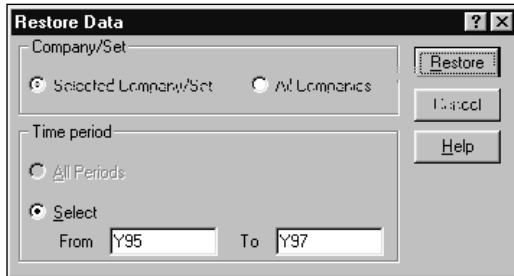
Begin from the Research Insight desktop:

1. From the **Databases** menu, select **View/Modify** Data.
   The View/Modify Data dialog box appears.

2. Enter the item that you want to restore in the **Item** field, and enter the company or set that you want to restore it for in the appropriate field.
3. Click the **Restore** button.
   The Restore Data dialog box appears.

4. To restore the data for the company or companies you selected in the View/Modify Data dialog box, keep the default setting of **Selected Company/Set**. To restore the data for every company in the database, select **All Companies**.
5. Select the time period for which you want to restore data.
   For example, if you want to restore data for an annual item for 1995 through 1997, enter the following:

   From Y95   **To** Y97

   The **All Periods** option is only available when **All Companies** is selected.

6. Click **Restore**.

    After restoring the data values, Research Insight returns you to the View/Modify Data dialog box. From here you can proceed to restore another data itemor close the dialog box and return to the Research Insight desktop.

Note: Restoring user defined data returns all data fields to @NA (not available). You cannot restore user-defined data to previous user-defined data.