

Welcome to I-Metrix, your access to SEC filings and more! We've created this user guide to facilitate your use of this service.

If at any point you need additional assistance, contact our Customer Support team by calling 1-888-870-2316 or emailing contactsupport@edgar-online.com.

To begin, point your browser to:

<http://i-metrix.edgar-online.com/>

Login Page

Enter the Username and Password you received via email from **EDGAR Online**. Note: If you've misplaced your login identifiers, click the [Forgot your password?](#) link on the login screen.

TIP: For your convenience, your Username and Password will be saved by default and you will not be prompted to login again unless you manually click the logout link.

Subscriber Login

User Name: Password:

Remember me on this computer

[\[Forgot Your Password?\]](#) [\[Click Here to Subscribe\]](#)

Navigation



There is one main navigation bar consisting of **Tabs** at the top of every page that enable you to quickly navigate through the product areas

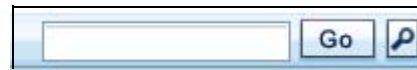
The **Tabs** represent the following:

- **Dashboard** - Personalize, customize and consolidate the companies and data you are most interested in on this page.
- **Today** – Quick access to the most recent SEC filings and company data of significance.
- **Company** – Drill down into specific company details including standardized financial data, significant SEC filings, ownership data and company people.

- **Industry** – Browse sector industry groups to find peers that fit your investing or financial models.
- **Search** – Search SEC filings using full text search, data filters, segment by market and time period, or restrict your search to specific filing sections.
- **Screener** – Create your own actionable target lists using over 200 variables, such as earnings estimates, market data, popular financial ratios, and industry comparisons.
- **Analytics** – Quick access to templates and other I•Metrix tools.

Filing Search

With the **Filing Search** users can easily get to all the SEC filings for a company by entering the ticker symbol. Use the magnifying glass for more search options.



TIP: Don't know the ticker? Enter the company name and results matching your request will be returned instantly.

Show Filings Add Company Results to Dashboard

Company Search Results					[Show Criteria]
Company	Ticker	CIK	Latest Filing	All Filings	
MICROSOFT AVN HOLDINGS, INC.		0001356955	03/21/06		View
MICROSOFT BENEFITS LLC		0001069973	09/04/98		View
MICROSOFT CORP	MSFT	0000789019	01/26/17		View
MICROSOFTWARE INTERNATIONAL INC		0000356946	01/12/95		View

Search Results

Search Results are displayed with the most recent filings appearing at the top of the list. The left hand menu bar provides links to other company information, including access to the MD&A sections of recent filings, financial data, current stock pricing and ownership information, giving you all the information you need on one page. At the top of the page are the options to **Add** the filings for the company that was searched to your **Dashboard** and create a **Filings Alert** for that company.



TIP: Use the "Back to Search Results" link when viewing documents instead of your browser toolbar – this will place a checkmark on items already viewed, otherwise, hit "refresh" to see indicators for the items you've looked at.

TIP: Use the icons next to the form types to view or download the filing in HTML, Word, Adobe PDF, Excel or the original format. In addition, you can view the filing in XBRL as well as run a historical comparison for 10K and 10Q documents.

Dashboard



When you log in or click the **Dashboard** tab you'll initially see a page with Today's Filings as the default view. The filings are grouped by filing type.

- Clicking anywhere in the row will bring you to a page giving more information on the filing and viewing options.
- Click on the icons to the left to view the filing in HTML, Word, PDF, Excel or HTML.
- Clicking on the **Company** name will bring you to all of the company's filings.
- Clicking on **Folders** enables you to quickly access links to filings you frequently use or that you need

to access from multiple locations (branch office, main office, client site, home office).

- The **Alerts** icon will set up an Alert for that Company and Form Type. An **Alert** allows you to follow companies when receiving notice via email or pop-up window when a filing meeting your criteria has been submitted.
- The buttons will move or close the window with the filings.

Use the Dashboard drop down menu to move between different dashboards. I-Metrix already has several dashboards set up.



To customize your dashboard, select either: **Add Content** or **Create New** from the **Dashboard** drop down.



You can add up to 10 customized content areas to a single dashboard by clicking on the **Add Content** button.

You can remove existing content from your dashboard by clicking the **button** located in each content area of your dashboard.

You can choose to add Company Summary Data Components, Stock Trade Data Components, SEC Filing Data Components and Ownership Data Components to your dashboard. You can save up to 10 different dashboards.

Just click on the items you want displayed on the **Add Content** page:

Enter Ticker Symbol: Dashboard Name: [Today's Dashboard](#)

Company Summary Data Components

- Company Summary
- Company News
- Company Info

Stock Trade Data Components

- Last Trade
- Interactive Chart

SEC Filing Data Components

- Latest Insider Filings
- All Filings

Ownership Data Components

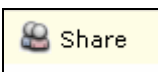
- Ownership Summary
- Insider Trades
- Institutional Holders

[Add Content](#)

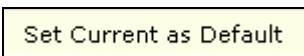
The [Add Content](#) page can also be reached through the [Preferences](#) link at the top every page.

Dashboards can be shared with your colleagues in read only mode.

Click on the [Share](#) link and you will be prompted for a list of email addresses to send the link to your dashboard.



Use the Set Current as Default link to select the dashboard you would like to appear every time you login to I-Metrix or select the dashboard tab.



Today



The Today tab provides quick access to the most recent SEC filings and company data of significance.

Today's Filings							
View	Form	(Hide Insiders)	Company (Filer)	Received	Period	Download / Print	Actions
			485APOS LEGG MASON ETF EQUITY TRUST	5:16 PM			
			485APOS MORGAN STANLEY US GOVERNMENT SECURITIES TRUST	5:16 PM			
			4 INTEL CORP.(YOFFIE DAVID B)	5:15 PM	01/25/17		
			SC 13G/A ATLAS AIR WORLDWIDE HOLDINGS INC. (AMAZON COM INC)	5:15 PM			
			NSAR-B DRETFUS MANAGER FUNDS II	5:15 PM	11/30/16		
			497 VALIC CO I	5:15 PM			
			SC 13G/A AIR TRANSPORT SERVICES GROUP INC. (AMAZON COM INC)	5:15 PM			

The day's filings are listed with the most recently received filing appearing at the top of the list.



The menu bar on the left side of the Today page allows you to locate specific filing types, as well as IPO and SPO activity.

Company

The [Company](#) tab allows you to drill down into specific company details including standardized financial data, significant SEC filings, ownership data and company people.

Simply enter in the company's ticker symbol or name to get the complete overview.

The 10 most recent SEC filings and current market information are provided at the top of the page. The main company page also gives you a summary of financial information, ownership information and current news. Use the left hand navigation bar to drill down further into company information including quick links to SOX Compliance information and the last MD&A.

Dashboard Today Company Industry Search Screener Analytics Go

Recent Companies
Get Company Summary for Go Print Add Summary to Dashboard Add Filings Alert

Company Summary
MICROSOFT CORP (MSFT)

Company Info
Last Trade: \$65.78 Change: 1.51 (2.35%) Trade Time: 04:15 PM EST
Volume: 44,808,032 52 Week Range: \$48.03 - \$64.54 Market Cap: \$511.46B

Risk Factors (10-Q 01/26/17)
SOX Compliance
Company News
Industry
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Last Quarterly Filing (10-Q 01/26/17)
Last Annual Filing (10-K 07/28/16)
Last Proxy Filing (DEFA14A 11/10/16)
All Filings (Excluding Insider)
All Filings
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All Annual Filings
All Proxy Filings
SEC Comment Letters and Correspondence

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5% Ownership Filings

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Summary
Fiscal Period: Q2 2017 (Ends 12/31/16)

Income Statement	TTM	YY Δ%	LQ Δ%	Cash Flow	TTM	YY Δ%	LQ Δ%
Revenue	\$85.69B	(2.72)	17.8	Operating Cash Flow	\$36.67B	16.5	(45.5)
Net Income	\$16.77B	43.2	10.9	Investing Cash Flow	(\$45.78B)	158	(20.1)
Gross Profit	\$52.24B	(7.33)	12.5	Financing Cash Flow	\$13.48B	(215)	(79.0)

Balance Sheet	MRO	4Q Δ%	LQ Δ%	Ratios	TTM	YY Δ%	LQ Δ%
Total Assets	\$224.61B	5.69	5.69	Price / Earnings	23.9	(23.4)	5.86
Total Cash	\$122.78B	(10.3)	(10.3)	Price / Book	7.07	21.5	9.61
Total Liabilities	\$155.88B	9.60	9.60	Price / Sales	5.68	12.0	6.97

View	Form	Filer	Received	Period	Download / Print	Actions
4	SC 13G/A	COURTOIS JEAN PHILIPPE	01/27/17	01/26/17		
10-Q		MICROSOFT CORP	01/26/17	12/31/16		
8-K		MICROSOFT CORP	01/26/17	01/26/17		
4	SC 13G/A	BLACKROCK INC.	01/25/17			
4		COURTOIS JEAN PHILIPPE	12/21/16	12/21/16		
4		SMITH BRADFORD L	12/20/16	12/15/16		
4		CAPOSELLA CHRISTOPHER C	12/20/16	12/14/16		
4		WARRIOR PADMASREE	12/09/16	12/08/16		
4		THOMPSON JOHN WENDELL	12/09/16	12/08/16		
4		PETERSON SANDRA E	12/09/16	12/08/16		

Institutional Holders

Total Number of Holders	2,357
% of Shares Outstanding	72.35%
Total Shares Held	5,625,603,488
Total Value of Holdings	\$361,557,536,173.76
Net Activity	(10,311,383)

Insider Trades

	Last 3 mos.	Last 12 mos.
Number of Insider Trades	4	33
Number of Buys	0	0
Number of Sells	4	33
Net Activity	(42,583)	(50,365,420)

Latest Company News

Microsoft earnings press release available on Investor Relations website	Date
Microsoft earnings press release available on Investor Relations website	01/26/17 4:10 PM
Sphere 3D launches U.S. go-to-market campaign featuring its Glassware 2.0 on Microsoft Azure	01/26/17 9:00 AM
Ginnimal Announces Growth Investment from Rubicon Technology Partners	01/25/17 6:05 PM
mcaConnect's D365 for Energy Enterprise Solution is Now Available to be Hosted in Microsoft Azure	01/25/17 6:00 AM
Global Computer Graphics Industry 2017 Market Applications for Gaming, Animation, CAD/CAM, Imaging : Nvidia, Intel, Microsoft	01/24/17 3:12 PM

(Quotes provided by Thomson Reuters are delayed by 15 minutes or more.)

Company Summary
MICROSOFT CORP (MSFT)

Company Info
Last Trade: \$64.08 Change: 0.40 (0.63%) Trade Time: 01:26 PM EST
Volume: 19,342,948 52 Week Range: \$48.03 - \$64.10 Market Cap: \$498.24B

Risk Factors (10-Q 01/26/17)
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4		THOMPSON JOHN WENDELL	12/09/16	12/08/16		
4		PETERSON SANDRA E	12/09/16	12/08/16		
4		NOSKI CHARLES H	12/09/16	12/08/16		
4		LIST TERI L	12/09/16	12/08/16		
4	8-K	MICROSOFT CORP	12/08/16	12/08/16		

Company Summary

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Stock Info
Last Trade: \$65.48 (-0.305/-0.46%)
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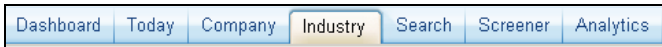
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The left hand navigation bar in the company section provides quick links to the latest information on a company.

Industry



The Industry tab allows you to browse sector industry groups to find peers that fit your investing or financial models.

The Industry tab features a left hand navigation bar that lists different sectors.



The Basic Materials Sector is the default setting and will appear when you click on the Industry tab.

Basic Materials			
Industry		Number of Companies	Filing Alerts
Agricultural Chemicals		90	
Aluminum		39	
Commodity Chemicals		221	
Construction Materials		111	
Diversified Chemicals		23	
Forest & Wood Products		71	
Gold		452	
Integrated Mining		504	
Mining Support Services & Equipment		26	
Non-Paper Containers & Packaging		117	
Paper Packaging		34	
Paper Products		85	
Precious Metals & Minerals		176	
Specialty Chemicals		120	
Specialty Mining & Metals		241	
Steel		213	

Latest Basic Materials Filings						
New	Form	Company (Filer)	Received	Period	Download / Print	Actions
	6-K	CRH PUBLIC LTD CO	01/26/17	01/25/17		
	4	RISE RESOURCES INC.(SCHARFE BRADLEY)	01/26/17	11/30/16		
	4	GOLDEN QUEEN MINING CO LTD.(CLAY THOMAS MORAGNE)	01/26/17	01/24/17		
	4	SONOCO PRODUCTS CO.(SCHRUM ROGER P)	01/26/17	01/25/17		
	15-12G	PANEX RESOURCES INC.	01/26/17			

Each sector is broken down into industries that fall within that sector. To the right of the industry are the **Number of Companies** within that industry.

Under the list of Industries are the latest filings for that particular sector. Click on the icons to the left to see the filing. Clicking on the company name will bring you to the company overview page. You can also place the filing into a folder or set up an alert using the icons to the right of the listing.

Clicking on any industry will bring you to a list of the companies that fall within that industry. This page also provides the latest filing date and quick access to the company page.

Commodity Chemicals			
Company	Ticker	CIK	Latest Filing
ABSOLUTE POTENTIAL, INC.		0001002360	10/08/14
ACETEX CORP		0001002929	07/20/05
AFS HOLDINGS, INC.		0001656506	06/30/16
AIR PRODUCTS & CHEMICALS INC./DE/	APD	0000002969	01/23/17
AIRGAS CARBONIC INC		0001158058	03/10/10
AIRGAS DATA LLC		0001158066	03/10/10
AIRGAS GULF STATES INC		0001158050	06/10/08
AIRGAS INC		0000904212	06/02/16
AIRGAS INTERMOUNTAIN INC		0001158051	03/10/10
AIRGAS MID AMERICA INC		0001158047	03/10/10
AIRGAS MID SOUTH INC		0001158193	03/10/10
AIRGAS NOR PAC INC		0001158052	03/10/10

On the far right side of the Sector page, **Filing Alerts** gives one click access to setting up an Alert for that industry that will let you know when any filings are submitted by any company within that industry.

Clicking on the bell icon under **Filing Alerts** brings up the **Add Alert** window that will be set up for the Industry Alert.

Add Alert

You have chosen to add an alert for the following:

Industry: Commodity Chemicals

Please enter a unique name for this alert and choose your alert options:

Alert Name

Email Alert **Popup Alert**

Add **Cancel**

Simply name the Alert, decide how you would like to be notified of a new filing – either via email or a popup window and click on **Add** and the Alert is set up.

Search



The **Search** tab allows users to search SEC filings using full text search, data filters, segment by market and time period, or restrict your search to specific filing sections.

The default search screen is the **All Filings** search:

Enter the ticker, company name or CIK and select any filters and time period for your search and click search.

You can also search by form types, SEC file number, accession number or Act group without specifying a particular company as well as utilize full text search or apply data filters.

Data Item	Is Greater or Equal to	Is Less or Equal to
Latest Market Cap	30,000,000	40,000,000
Net Income		
Revenue	200M	
Assets		

Clicking on the **Expand Form Types** link under the **Form Types** box will open a tree structure to help you locate the exact document needed without having to know the exact form number.

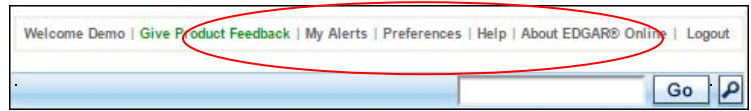
Clicking on **Save Alert** on the Search screen will create an Alert.

To search by a particular market segment, click on the **Market Segment** icon.

- Expanded Search**
- All Filings
 - Expanded Form Types
 - Annual Report Sections
 - Quarterly Report Sections
 - Proxy Statement Sections
 - Current Event (8-K) Sections
 - Foreign Companies
 - Mutual Funds
 - SEC Comment Letters and Correspondence
 - Financial Comparison
 - Ownership
 - 13F Securities List
 - IPOs
 - Secondary Offerings
 - Transcripts

On the left hand side of the search page are links to different options to help you quickly find the documents and information you need.

Other Options



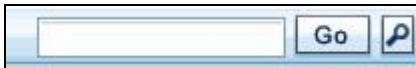
At the top right side of every screen is another menu bar.

My Alerts – manage your alerts and add new alerts from this screen.

Preferences presents a personalized screen of your **Site Preferences** - saved dashboards, alerts, folders, and the default search and display settings which will be used to pre-populate your home page with filings.

Personal Preferences – updating your Personal Information, managing email addresses and changing your password are also located in the preferences section.

Use the **Quick Search** feature at the top of every page to get the information you want quickly.



The magnifying glass will enable you to narrow your search to bring back the results fitting your criteria.

Search Filings

Ticker Symbol

Separate Multiple Symbols with Commas

Company Name

CIK

Full Text Search

Form Group -- All Form Groups --

- All Forms EXCEPT 3,4,5,144s
- All Forms EXCEPT Ownership
- Annual Reports - 10K

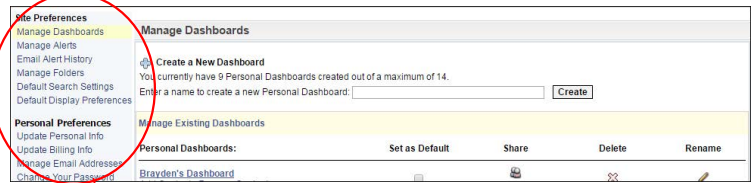
Form Type -- All Form Types --

- 013
- 013 POS
- 013K

Time Frame Last 12 Months

Date Type Received Date

Display By Company Filings



- Site Preferences**
- Manage Dashboards
 - Manage Alerts
 - Email Alert History
 - Manage Folders
 - Default Search Settings
 - Default Display Preferences
- Personal Preferences**
- Update Personal Info
 - Update Billing Info
 - Manage Email Addresses
 - Change Your Password

Help is context sensitive and will provide instruction on how to navigate and utilize whichever I-Metrix screen you are on.

Contact Us links to EDGAR Online's contact information and a form that will enable you to be contacted by a Sales Representative.

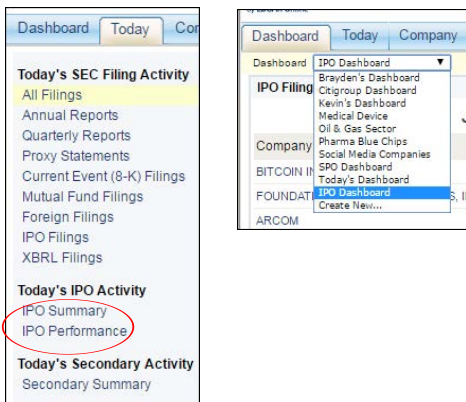
About EDGAR Online links to EDGAR Online's home page where you can learn about all our product offerings.

Logout logs you out of I-Metrix and prevents unauthorized use.

FAQ's

Q: Where is the IPO and SPO information?

A: IPO and SPO information is located under the Today tab, on the left hand navigation bar. You can also search for specific IPOs/SPOs using the **Expanded Search** menu. There is also an **IPO Dashboard** set up that can be accessed from the Dashboards page using the drop down menu.



Q: How do I find ownership information?

A: You can find ownership information using the Search tab and selecting Ownership under the Expanded Search menu. Or, you can use the Company Search at the top of the page and the Ownership Information will be located towards the bottom of the Company Profile that is returned from this search option.



SEC Filings	4	NOSRI CHARLES H	12/08/16	12/08/16	
Last MD&A (10-Q 10/2016)	4	LIST TERIL	12/08/16	12/08/16	
Last Quarterly Filing (10-Q 10/2016)	8-K	MICROSOFT CORP	12/08/16	12/08/16	
Last Annual Filing (10-K 07/2016)					
Last Proxy Filing (DEFAT14A 11/10/16)					
All Filings (Excluding Insider)					
All Quarterly Filings					
All Annual Filings					
All Proxy Filings					
SEC Comment Letters and Correspondence					
Financials - Values in (000s) (X)					
Quarter Ending:	1st 9/30/2016	4th 6/30/2016	3rd 3/31/2016	2nd 12/31/2015	1st 9/30/2015
Balance Sheet					
Total Current Assets	\$157,909,000	\$139,660,000	\$128,421,000	\$127,812,000	\$121,696,000
Total Assets	\$212,524,000	\$193,694,000	\$181,869,000	\$180,596,000	\$172,896,000
Total Current Liabilities	\$58,810,000	\$59,357,000	\$44,354,000	\$42,643,000	\$49,399,000
Total Liabilities	\$142,152,000	\$121,697,000	\$107,093,000	\$103,318,000	\$95,451,000
Total Equity	\$70,372,000	\$71,997,000	\$74,806,000	\$76,780,000	\$77,445,000
Ownership					
Summary					
Insider Trades	\$12,609,000	\$12,635,000	\$12,809,000	\$13,924,000	\$13,172,000
Latest Insider Filings	\$5,225,000	\$3,060,000	\$5,383,000	\$8,026,000	\$5,793,000
Latest Insider Filings	\$4,690,000	\$3,122,000	\$4,056,000	\$4,716,000	\$4,982,000
Institutional Holders					
Cash Flow					
Net Income	\$4,690,000	\$3,122,000	\$4,056,000	\$4,716,000	\$4,902,000
Executive Compensation	\$11,549,000	\$8,464,000	\$10,669,000	\$5,316,000	\$8,876,000
Net Cash Flow-Operating	\$7,418,000	(\$860,000)	(\$15,000)	\$1,754,000	(\$164,000)
Company People					
Executive Compensation					
All Company People					