Welcome to EDGAR Pro, 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: https://pro.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.

**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.

**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.

**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.

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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, 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.
- 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).

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. You can also view the filing in XBRL as well as run a historical comparison for 10K and 10Q documents.

- The Alerts icon  will set up an Alert for that Company and Form Type. An Alert allows you to follow companies by 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. EDGAR Pro 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:

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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 EDGAR Pro or select the dashboard tab.

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

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.

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.
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.

Sector

- Basic Materials
- Consumer Cyclicals
- Consumer Non-Cyclicals
- Energy
- Financials
- Healthcare
- Industrials
- Technology
- Telecommunication Services
- Utilities

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

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.

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.

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.

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.

```
Full Text Search
change <near/5> control <near/5> definition <and>
(employment <or> stock option <or> severance)
```

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.
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.

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.

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.

**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 EDGAR Pro 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 EDGAR Pro 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.