PERFECT INFORMATION

Filings Expert User Guide

WWW.FILINGSEXPERT.COM



Getting Started

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- 1 Predictive Search Bar use to look up companies, sectors, exchanges, corporate actions etc. and/or to free text search.
- 2 Search Filters open relevant filters to see the number of results available based on existing search parameters. You can use these filters to refine your results.
- 3 Advanced Search Builder
- 4 Search Criteria will be added here.
- 5 Menu to access the search Query Checker and to save Searches and Alerts.
- 6 Saved Items any searches, alerts, company lists and documents you choose to save will be stored here.
- 7 Highlights switch off/on hit highlighting when a free text search has been included.
- 8 **Options** to set user preferences, access help guides and product walk-through.
- 9 Ellipsis select to show all other disclosure for selected result.

Advanced Search Options

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- 1 Click on Advanced search.
- 2 Select from the list of search options.
- 3 Select the relevant search criteria.
- 4 Five options for search criteria:
- 🛛 Select All 🛛 📲 Tree View
- \equiv List View
- 5 Select **Query Checker** to view the number of results to be returned.
- 6 Click **Search** to bring back the results.

Defining Your Search Logic Use Boolean logic to change your search operators

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- Two terms in an AND (conjunction). 1
- 2 Hover over a term and select NOT to exclude an item (negation).
- 3 Hover over and select OR to look for either item in your search (disjunction).

Text Searching Search for key words or phrases within any documents or document titles

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Properties Pasting			

- Enter your text into the predictive search bar. 1
- Use the question mark icon to reveal syntax assistance. 2
- 3 Select **Text Search** to text search the documents, or select **Document Title** to isolate the search to just the document caption.
- 4 Results can be viewed by date or sorted by relevance.
- 5 Text highlighting can be switched off if required.

Clause & Clause Text Searching Search prospectuses for single or multiple clause and text combinations. For example "exchange rate" within Risk Factors, "relationship agreement" within Material Contracts and "waiver" within Related Party Transactions.

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- 1 From the Advanced Search Builder, select Clause Search from the Menu.
- 2 First, filter by **Clause Type**. If your clause is not found in the list, use the search field look up, for example Risk Factors.
- 3 To search for text within your clause, select Text or **Phrase** and enter accordingly, for example "exchange rate".
- 4 The text search syntax help file shows how to construct different text combinations.
- 5 Select **Apply** to add to your search criteria.
- 6 Click on **Search** to view your results.

Working with Documents Pin documents from any search to e-mail, download multiple financials to Excel from annual reports and to save document groups.

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- 1 Pin selected document from any number of searches up to a maximum of 250 documents.
- 2 Click on Documents to review your pinned documents.
- 3 This multifunctional area allows you to: • E-mail documents and/or results lists. • Filter and download annual report financials directly to Excel.
 - Create individual document groups.
- 4 Clear allows you to quickly remove all documents from this area.

Query Checker, Saved Searches and Alerts Pin documents from any search to e-mail, download multiple financials to Excel from annual reports and to save document groups.

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- 1 Use the **Query Checker** to check your search syntax.
- 2 Set up live, daily, or weekly alerts delivered to your inbox.
- 3 Create saved searches using your base search criteria or company only groups to track your portfolios. These can also be shared with colleagues who have access for ease of collaboration.
- 4 Saved searches, company lists and alerts will be

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Support & Assistance

Compatible Browsers are Chrome and Internet Explorer 11.

If you experience any display issues, always try the following first:

- Simultaneously press Ctrl and F5 on your keyboard.
- Delete all temporary internet files using your appropriate method for your browser.
- Check that Javascript is enabled and for help please visit http://enable-javascript.com
- Some browser versions might require file and font downloads to be enabled, you can do this in the same settings section as described above.
- If you are running IE11 in a lower compatibility mode, you can try pressing F12 and under 'emulation', select a higher compatibility level.

Please check with your support department before making changes to your settings.

PI Knowledge Centre

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