



# LexisNexis® Dossier Business Intelligence Suite

Your essential tool for up-to-date research of the people, companies and industries that matter to your business.

The pace of business has accelerated and is more competitive than ever. You need the right tools that put insights and information into your hands with confidence. We've found that today's searches and queries require more than standard functionality; they require robust features that transform data to decisions. That's where LexisNexis Dossier makes all the difference.

Want to research a company, industry or executive? With LexisNexis Dossier, you'll access our trusted business and news content with search results delivered in an easy-to-navigate interface—allowing you to speed through information, find relevant insights and make decisions more efficiently.



240 Million  
Companies Across  
the Globe



40,000 News and  
Business Sources

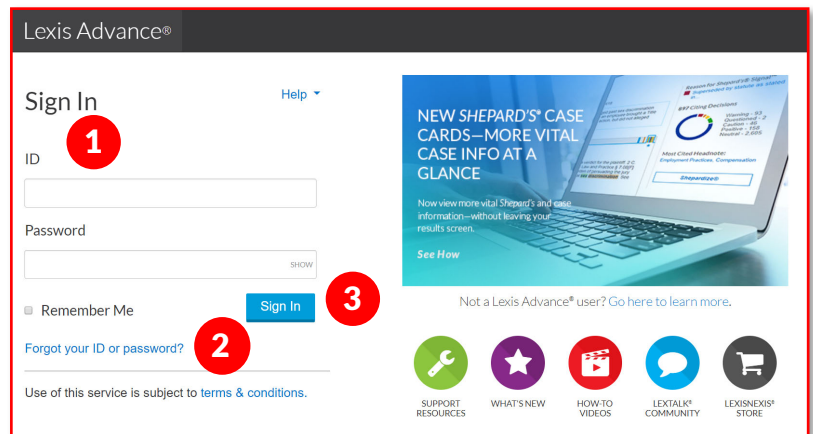


70 Million  
Executive Profiles

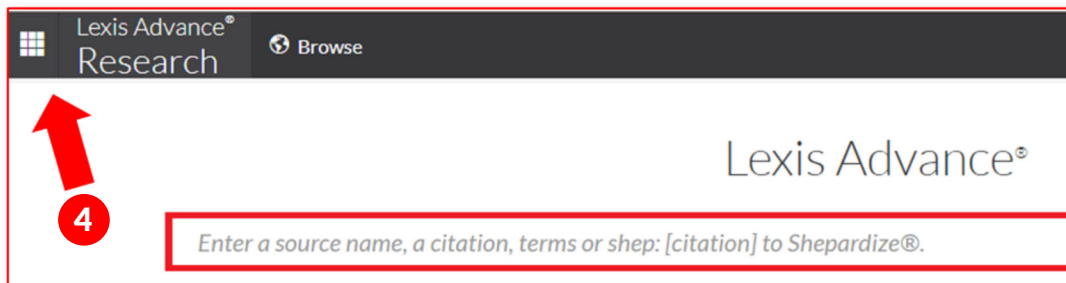
# Signing Into Dossier

Go to the login page: [LexisAdvance.com](https://www.lexisadvance.com)

- 1 Enter your Lexis Advance user ID and Password.
- 2 If you have forgotten your password, please click the "Forgot your ID or Password"
- 3 Click Sign In.
- 4 Once logged in, go to the product switcher in the upper left-hand corner.

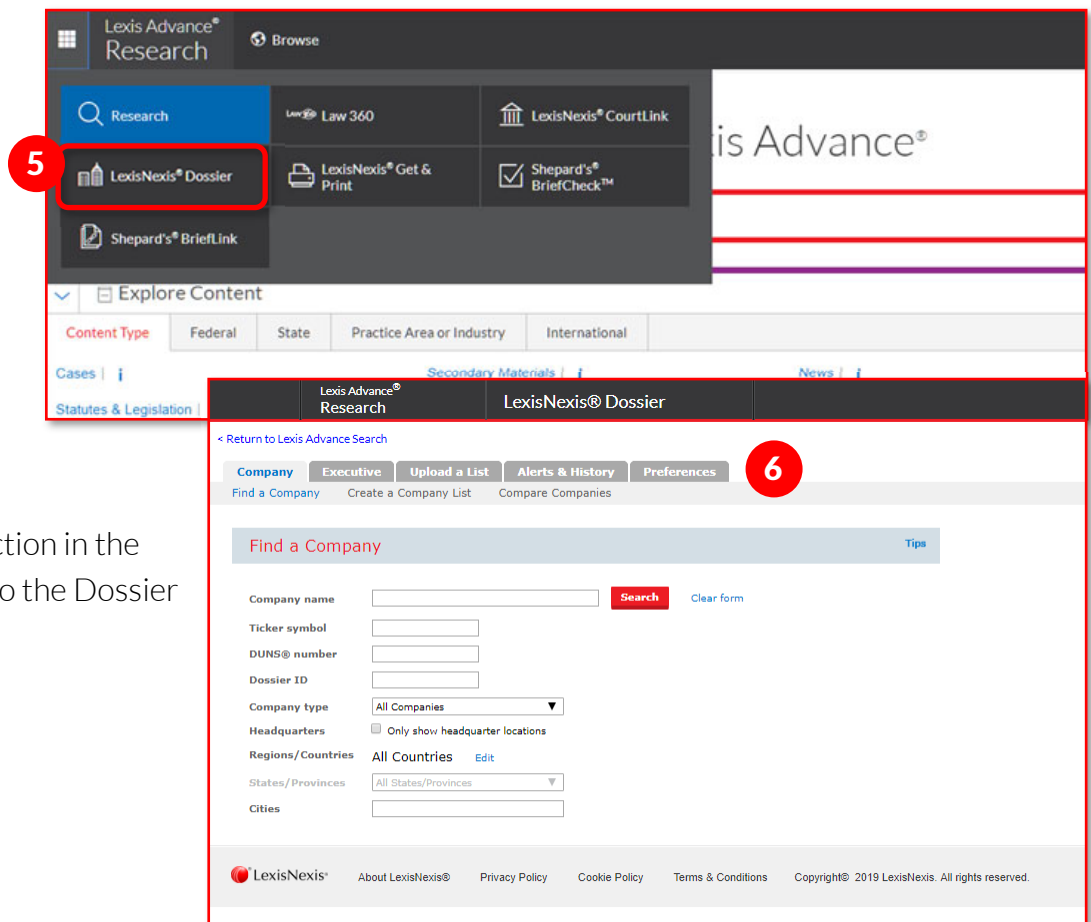


The screenshot shows the Lexis Advance Sign In page. A red circle with the number 1 is over the ID input field. A red circle with the number 2 is over the "Forgot your ID or password?" link. A red circle with the number 3 is over the "Sign In" button. The page also features a "NEW SHEPARD'S CASE CARDS" banner and a navigation bar with icons for Support Resources, What's New, How to Videos, LexTalk Community, and LexisNexis Store.



The screenshot shows the Lexis Advance Research homepage. A red arrow with the number 4 points to the search bar, which contains the placeholder text "Enter a source name, a citation, terms or shep: [citation] to Shepardize®".

- 5 Click on LexisNexis® Dossier® from the menu.



The screenshot shows the Lexis Advance Research menu and the LexisNexis® Dossier homepage. A red circle with the number 5 is over the "LexisNexis® Dossier" menu item. A red circle with the number 6 is over the "Find a Company" search bar. The Dossier homepage includes a "Find a Company" section with input fields for Company name, Ticker symbol, DUNS® number, Dossier ID, Company type, Headquarters, Regions/Countries, States/Provinces, and Cities. It also has a "Search" button and a "Clear form" link.

- 6 After making the selection in the menu, you will arrive to the Dossier homepage.

# LexisNexis® Company Dossier



LexisNexis Dossier recently increased the number of companies within Dossier from 80M to more than 240M – including smaller, private domestic and international companies. Here are some quick tips on how to use Dossier effectively,

## Create Your Search

- 1 Start at the Dossier homepage.
- 2 From the Dossier homepage, click on **Create a Company List**

## Customize Your List

You will be taken directly to the Create a Company List search screen within LexisNexis Dossier. Fill out the simple Create a Company List form and hit the create button to quickly get your results.

- 1 From the **Company type** drop-down, you can select public or private types of businesses. Also, you can search for all instances of companies or check the box to limit it to only **headquarters**.
- 2 If you want to go broad, you can build lists from **sales revenue**, **employee size**, **NAICS codes**, or **SIC codes**.
- 3 If you are looking for specific companies, you can search by **Company Name**, **Ticker symbol** or **Dossier ID**.
- 4 If there is a particular region of the world you are targeting, be sure to fill out **Geographic Information**.
- 5 Once your form is complete, hit **Create**.

## Customize your List

Once you hit Create, you will land on a Company List – Preview screen, where you can view some of the companies on your list and the count of companies that met your criteria. To customize and download your list, **click the customize button**.

You will go to the Customize Your Company List Window.

- 1 Select the number of results you seek.
- 2 Choose what information you want in your company list, including attributes surrounding **Contact**, **Company**, **Financial**, and **Internet** information.
- 3 Click the **Update** button.

**Your Company List - Preview**

Your search found **85801** companies. Click the Customize button to customize

Company Name	Street Address
1. <a href="#">Volkswagen Sachsen Immobilienverwaltungs GmbH</a>	Glauchauer Strasse
2. <a href="#">VOLKSWAGEN AG-ADR (VWAGY)</a>	2 Berliner Ring, WOLFSBURG

**Customize Your Company List**

Your search found **85801** companies.  
Return **1000** results

Define the default sort order of your company list:  
Default Sort Order

Specify the attributes that will appear in your company list. [Select All](#) | [Clear All](#)

**Contact Information**

- ☒ Ticker Symbol
- ☐ Executives
- ☒ Telephone Number
- ☒ Fax Number
- ☒ Street Address
- ☒ City
- ☒ State/Province
- ☒ Postal Code
- ☒ Country
- ☐ County

**Company Profile**

- ☒ Company Type
- ☒ Headquarters
- ☒ Primary SIC Code
- ☐ Secondary SIC Code
- ☐ Dossier ID
- ☐ Primary NAICS Code
- ☐ Secondary NAICS Code
- ☐ Top Companies
- ☒ Number of Employees
- ☐ Business Description
- ☐ Auditor
- ☐ Legal Counsel

**Financial Profile**

- ☒ Sales/Revenue
- ☐ Assets
- ☐ Liabilities
- ☐ Market Capitalization
- ☐ Earnings Per Share
- ☐ EPS Growth Rate
- ☐ Price/Earnings Ratio
- ☐ Return on Equity

**Currency Conversion** ⓘ  
US Dollars (USD)

**Internet Information**

- ☒ URL/Web Address
- ☒ Company Email Address
- ☐ LinkedIn
- ☐ Youtube
- ☐ Facebook
- ☐ Twitter
- ☐ Pinterest
- ☐ Google+

\*Only the first 50 executives per company will be downloaded from 'Create a Company List' results.

**Update** **Cancel**

## Customize and Download your List

Once you update, you will return to Your Company List – Results page.

- 1 From here, click on the blue **Download** button.
- 2 A pop-up window will appear for you to select from downloading as a Microsoft Excel spreadsheet or a CSV formatted file.
- 3 Once you select the file type, click on the blue **Download** button, and you will automatically start to download your list.

**Your Company List - Results**

Your search found **85801** companies.

**Download** 1

Company Name	Street Address
1. <a href="#">Volkswagen Sachsen Immobilienverwaltungs GmbH</a>	Glauchauer Strasse
2. <a href="#">VOLKSWAGEN AG-ADR (VWAGY)</a>	2 Berliner Ring, WOLFSBURG

**Download List**

Download your list of companies to:

- ☒ A Microsoft Excel spreadsheet 2
- ☐ CSV formatted file

Download delivery is subject to [Terms & Conditions](#). Please review them.

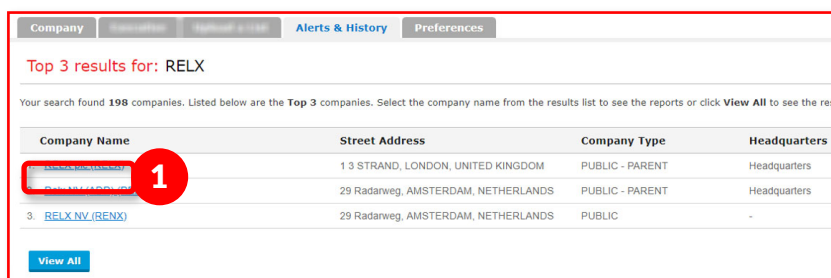
**Download** 3 **Cancel**

## Generate a Snapshot Report

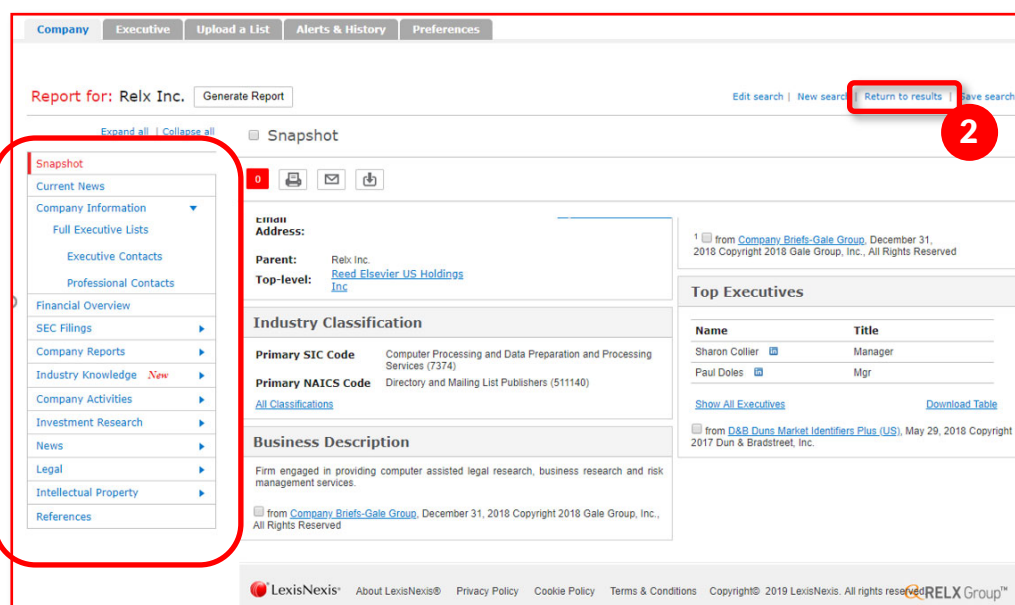
The company snapshot provides important news, records and financials about the company you are researching. From the main screen, you will see quick information on the company, headquarters, earnings, stock prices, executives and more.

**1** To generate a Snapshot Report for any company on your list, simply click on the **company name** within your results list.

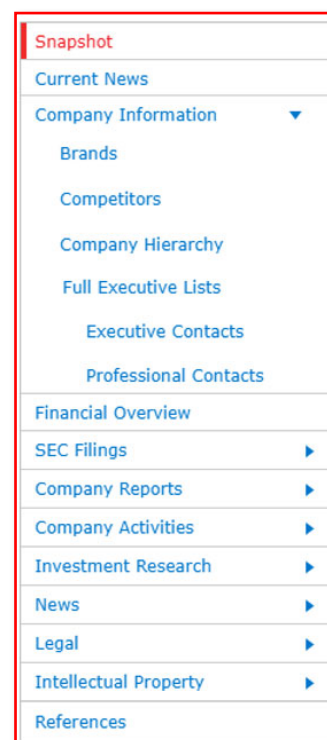
**2** If you want to go back to our Company List, click on the **Return to Results** link at the top of the Snapshot Report page.



Click on links within the snapshot for more information or dig into the details with the left-hand navigation.

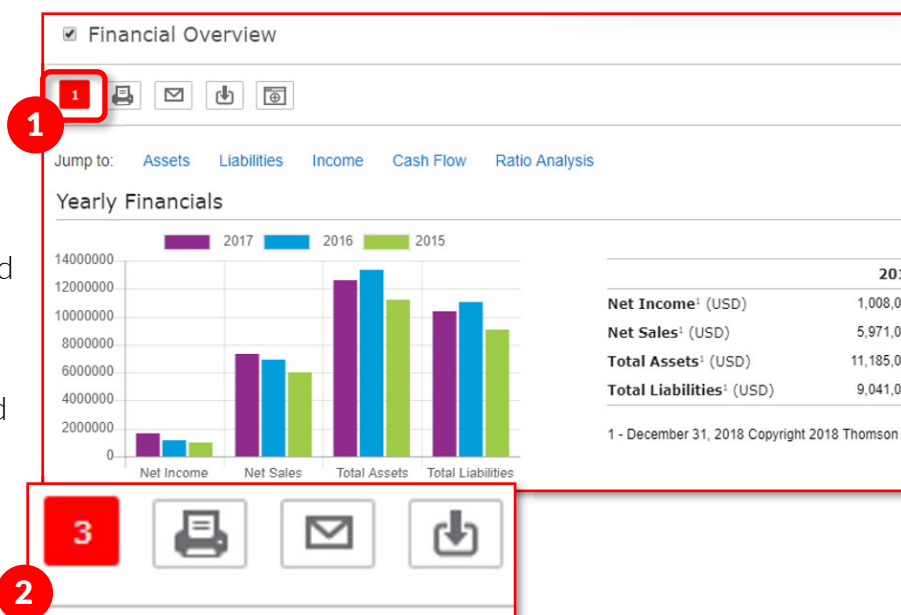


- Review current news which you can sort by date or relevance, or review news by top publication, topic or region
- Company information includes company brands, competitors, company hierarchy and executive details
- Get quick visuals and details of year-over-year financials
- SEC files include executive compensation, corporate articles and bylaws, contracts, insider trading files, proxy statements, ownership filings and 8-K, 10-K and 10-Q filings
- Company activities show mergers and acquisitions
- Investment research includes analyst reports
- Click to see recent cases and legal reports
- Intellectual property includes information on patents, trademarks, and US copyrights



As you are reviewing documents, select the ones you want to save, download, print or share by clicking on the check box.

- 1 A red box will show you how many documents you have selected.
- 2 Print, email or download your selected documents. Click on your desired delivery method, and be sure to review the formatting (select font and a cover page) and file options (you can choose to download your file as a .pdf, .doc or .rtf).



Dossier will combine the documents into a single document.

## Save Your Search Query

If you anticipate the need to rerun the same list search, you can save your search.

- 1 Click on the **Save Search** link at the top of the Results page.
- 2 Name your search and click **Save**.
- 3 Your search has been saved. It is now available in **Saved Searches** under the **Alerts and History** tab.

The screenshot shows the 'Save Search' dialog box. It has a title bar with 'Lexis Advance Research' and 'LexisNexis® Dossier'. The main content area has a heading 'Save Search' and a text input field with the value 'Libraries'. Below the input field are 'Save' and 'Cancel' buttons. A red box labeled '2' highlights the 'Save' button.

The screenshot shows the 'Saved Searches' section in the LexisNexis® Dossier. It has a title bar with 'Lexis Advance Research' and 'LexisNexis® Dossier'. The main content area has a heading 'Saved Searches' and a table with columns 'Name', 'Report Type', and 'Edit Search'. The table contains one row with the name '1. Libraries', report type 'Company List', and an 'Edit Search' link. A red box labeled '3' highlights the 'Saved Searches' link in the navigation menu.

Name	Report Type	Edit Search
1. Libraries	Company List	<a href="#">Edit Search</a>

# LexisNexis® Executive Dossier



If you are seeking information on a specific company executive, start with Find an Executive. Here are some quick tips.

## Find an Executive Search

Fill out our simple Find an Executive form and hit the red search button to quickly get your results.

- 1 If you know the executive you are looking for, simply enter their name in the designated fields. Specifically, the last name is required for an Executive search.
- 2 You can select from Executive Profiles, All News, Negative News, SEC Filings, Congressional Testimony and United States Case Information.

The search will provide you with the results based on your inquiry, defaulting to the first source types you selected.

- 3 Click on the blue links to the left (such as Executive Profiles or SEC Filings) to view the results under each source type.

- 4 Check the boxes of the results you would like to:

- **Print:** You can print your results list or full documents by clicking on the printer icon. Then, click on the blue Print button.
- **Email:** By clicking on the envelope icon, you can email your results list or full documents as a .pdf, Word .doc or Rich Text Format document. Then enter your email addresses (up to 3) and click the blue Send button.

- **Download** – Click on the icon with the downward-facing arrow icon to download your full documents or results list. Select from downloading as a .pdf, .doc or .rtf file type. Then, click the blue Download button the file(s) will begin downloading to your computer.

## Create Your Executive Search

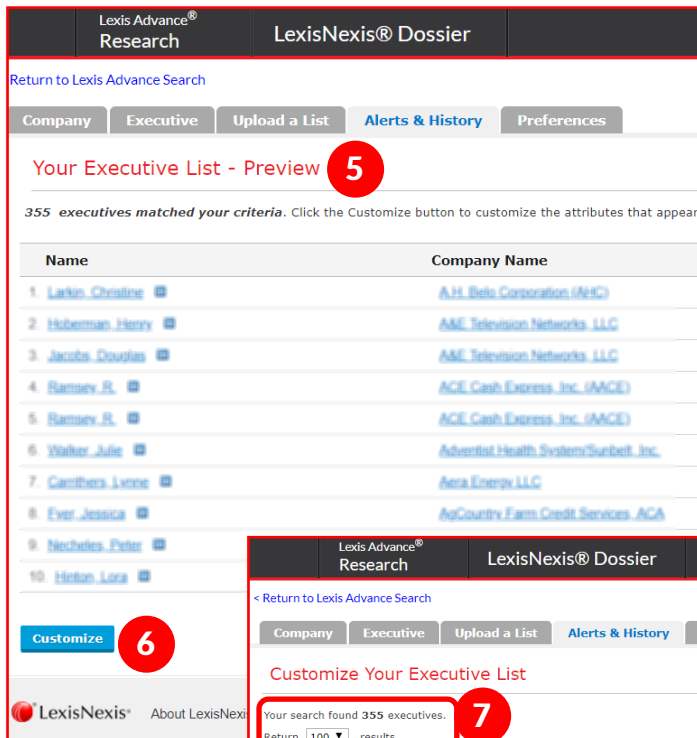
Fill out our simple Find an Executive form and hit the red search button to quickly get your results.

- 1 **Job Title** – Search with title, specialty and function.
- 2 **Company** – If you are looking for executives within specific companies, you can search by **Company**
- 3 **Name, NAICS code, Ticker symbol or Dossier ID.**
- 4 **Geographic Information** – You can target a region of the world from countries to street addresses.

Once your form is complete, hit **Create**.

## Customize and Download Your List

- 5 Once you hit Create, you will land on an **Executive List – Preview** screen where you can see some of the executives on your list and the count of executives who met your criteria.



Lexis Advance® Research LexisNexis® Dossier

Return to Lexis Advance Search

Company Executive Upload a List Alerts & History Preferences

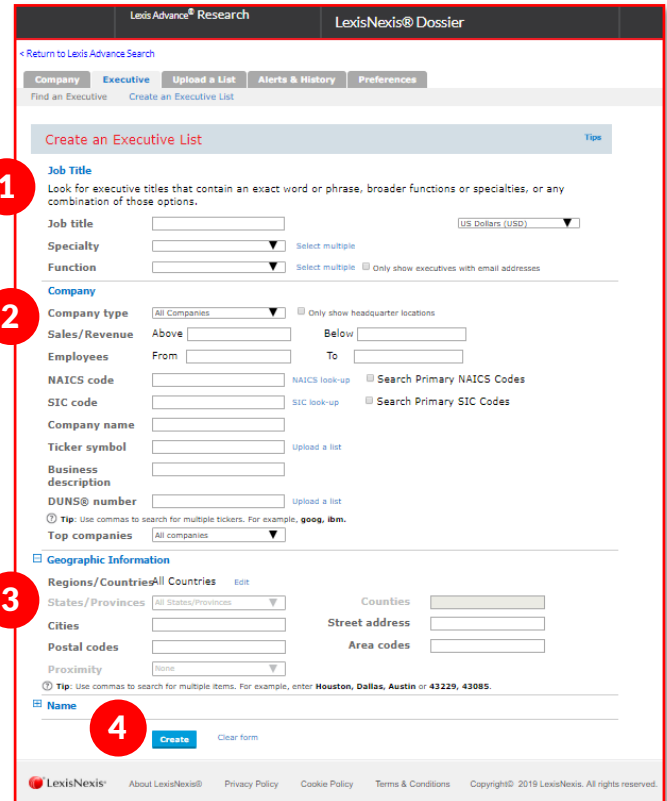
**Your Executive List - Preview** 5

355 executives matched your criteria. Click the Customize button to customize the attributes that appear

Name	Company Name
1. Lakin, Christine	A.H. Belo Corporation (AHC)
2. Hoberman, Henry	AME Television Networks, LLC
3. Jacobs, Douglas	AME Television Networks, LLC
4. Ramsey, R.	ACE Cash Express, Inc. (ACE)
5. Ramsey, R.	ACE Cash Express, Inc. (ACE)
6. Walker, Julie	Adventist Health Systems/Sunbelt, Inc.
7. Carothers, Lyone	Aera Energy LLC
8. Ever, Jessica	AgCountry Farm Credit Services, ACA
9. Necheles, Peter	
10. Hinton, Lora	

Customize 6

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Return to Lexis Advance Search

Company Executive Upload a List Alerts & History Preferences

Find an Executive Create an Executive List

**Create an Executive List** 4

**Job Title**

Look for executive titles that contain an exact word or phrase, broader functions or specialties, or any combination of those options.

Job title  (US Dollars (USD))

Specialty  Select multiple

Function  Select multiple Only show executives with email addresses

**Company**

Company type  Only show headquarter locations

Sales/Revenue Above  Below

Employees From  To

NAICS code  NAICS look-up Search Primary NAICS Codes

SIC code  SIC look-up Search Primary SIC Codes

Company name

Ticker symbol  Upload a list

Business description

DUNS® number  Upload a list

Tip: Use commas to search for multiple tickers. For example, enter Houston, Dallas, Austin or 43229, 43085.

Top companies

**Geographic Information**

Regions/Countries All Countries Edit

States/Provinces All States/Provinces Counties

Cities  Street address

Postal codes  Area codes

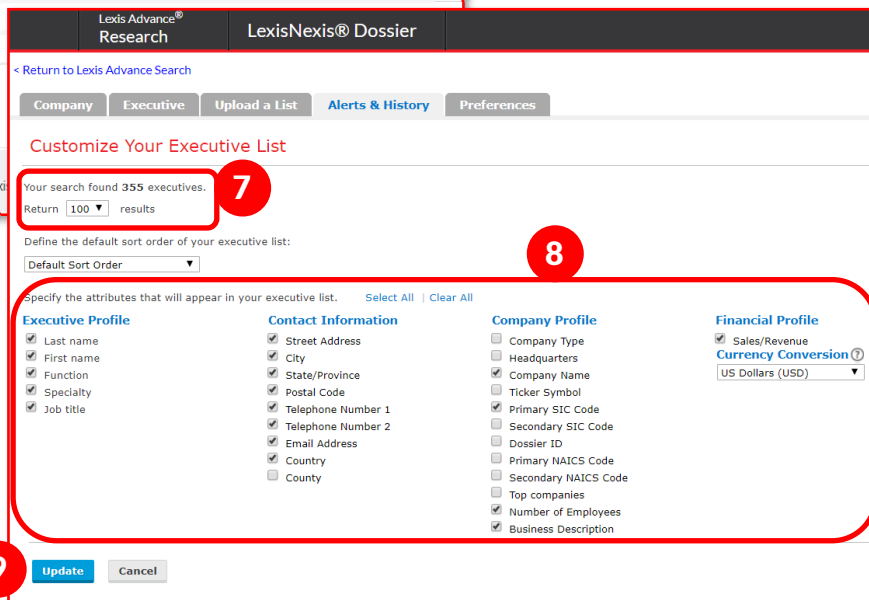
Proximity

**Name** 4

Create Clear form

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- 6 To customize your list, hit the **Customize** button and you will go to the **Customize Your Company List**.
- 7 Select the **number of results** you seek.
- 8 Choose what information you want in your list, including attributes like their **Contact Information**, **Executive**, **Company** and **Financial Profiles**.
- 9 Once you've specified your attributes, click **Update**.



Lexis Advance® Research LexisNexis® Dossier

Return to Lexis Advance Search

Company Executive Upload a List Alerts & History Preferences

**Customize Your Executive List**

Your search found 355 executives. 7

Return 100 results

Define the default sort order of your executive list:

Default Sort Order

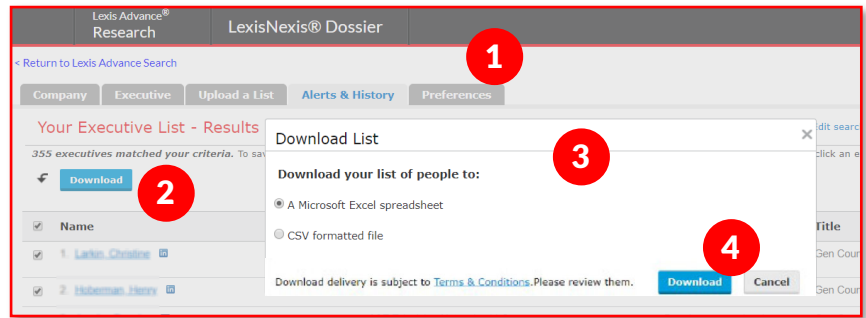
Specify the attributes that will appear in your executive list. Select All | Clear All

Executive Profile	Contact Information	Company Profile	Financial Profile
<input checked="" type="checkbox"/> Last name	<input checked="" type="checkbox"/> Street Address	<input type="checkbox"/> Company Type	<input checked="" type="checkbox"/> Sales/Revenue
<input checked="" type="checkbox"/> First name	<input checked="" type="checkbox"/> City	<input type="checkbox"/> Headquarters	<input checked="" type="checkbox"/> Currency Conversion 9
<input checked="" type="checkbox"/> Function	<input checked="" type="checkbox"/> State/Province	<input checked="" type="checkbox"/> Company Name	US Dollars (USD)
<input checked="" type="checkbox"/> Specialty	<input checked="" type="checkbox"/> Postal Code	<input checked="" type="checkbox"/> Ticker Symbol	
<input checked="" type="checkbox"/> Job title	<input checked="" type="checkbox"/> Telephone Number 1	<input checked="" type="checkbox"/> Primary SIC Code	
	<input checked="" type="checkbox"/> Telephone Number 2	<input type="checkbox"/> Secondary SIC Code	
	<input checked="" type="checkbox"/> Email Address	<input type="checkbox"/> Dossier ID	
	<input checked="" type="checkbox"/> Country	<input type="checkbox"/> Primary NAICS Code	
	<input type="checkbox"/> County	<input type="checkbox"/> Secondary NAICS Code	
		<input type="checkbox"/> Top companies	
		<input checked="" type="checkbox"/> Number of Employees	
		<input checked="" type="checkbox"/> Business Description	

9 Update Cancel

## Save and Download Your List

- 1 Once you Update, you will return to Your Executive List – Results page.
- 2 From here, click on the blue Download button.
- 3 A pop-up window will appear for you to select from downloading as a Microsoft Excel spreadsheet or a CSV formatted file.
- 4 Once you select the file type, click on the blue Download button to download your list.



## Save Your Search Query

If you anticipate the need to re-run the same list search, you can save your search.

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- 6 Name your search and click Save.
- 7 Your search has been saved. It is now available in Saved
- 8 Searches under the Alerts and History tab.

