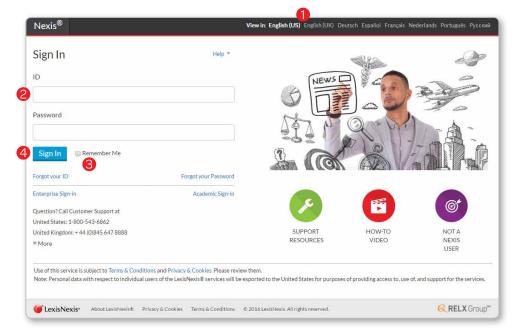# LexisNexis® Dossier Suite
User Guide

LexisNexis® Dossier Suite Overview

Gain deeper insights into the players and dynamics of your marketplace using comprehensive company, executive and industry information.

Signing in

Go to the login page at www.nexis.com

1 Choose the language you prefer to use within the LexisNexis® Dossier interface. Based on your selection, region-specific customer support options will appear within the top navigation after login.

2 Enter your LexisNexis Dossier user ID and password.

3 Check the **Remember My Sign-in Information** to save your ID and password for seamless login.

4 Click **Sign In**.

Nexis®

View in: **English (US)** English (UK) Deutsch Español Français Nederlands Português Русский

Sign In   Help ▾

ID

Password

Sign In   ☐ Remember Me

Forgot your ID   Forgot your Password

Enterprise Sign-in   Academic Sign-in

Question? Call Customer Support at
United States: 1-800-543-6862
United Kingdom: + 44 (0)845 647 8888
⌄ More

SUPPORT RESOURCES   HOW-TO VIDEO   NOT A NEXIS USER

Use of this service is subject to Terms & Conditions and Privacy & Cookies. Please review them.
Note: Personal data with respect to individual users of the LexisNexis® services will be exported to the United States for purposes of providing access to, use of, and support for the services.

LexisNexis®   About LexisNexis®   Privacy & Cookies   Terms & Conditions   © 2016 LexisNexis. All rights reserved.   RELX Group™
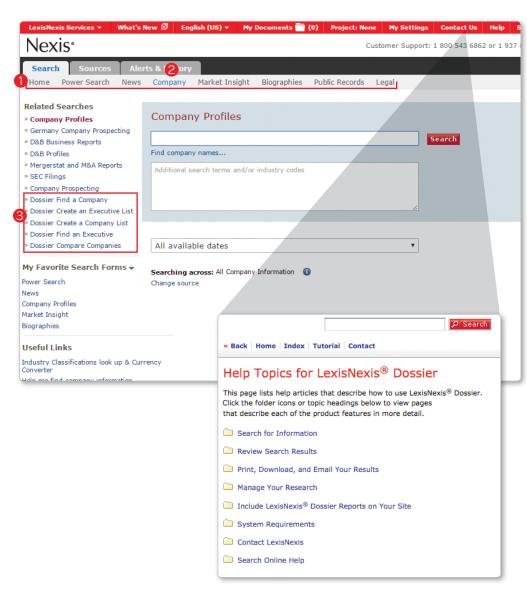

LexisNexis®

Navigation

1 The available Search tabs are specific to your Dossier subscription.

2 Click the **Company** tab to view the Dossier options which will appear in the left navigation bar under **Related Searches**.

3 Select the Dossier function you would like to use. This will take you to the subsequent Dossier search form.

Help

- Find Support Options through the **Help** link in the top right corner.
- Region-specific customer support options are displayed in the top right corner of the page.
- Find more training and help resources on the **Dossier User Site**: lexisnexis.com/bis-user-information/dossier

Save and Share Documents

Once you've run a search for a company or executive in Dossier, you can easily save and share results in several ways:

4 To select a document for delivery, check the box to the left of the name of the document.

5 Click the **Print**, **Email** or **Download icon** for further delivery options.
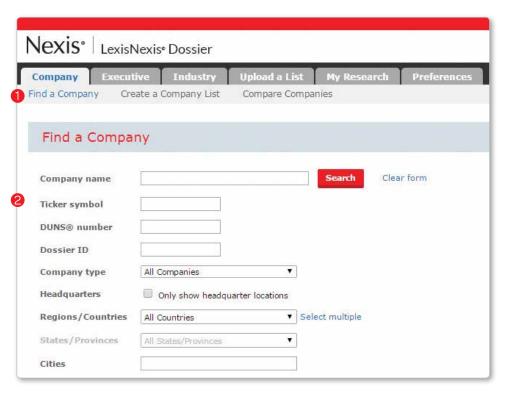
LexisNexis®
Company Dossier

Find a Company

1 The **Find a Company** tab within LexisNexis Company Dossier allows you to access the in-depth profile on a company of your choice.

2 Search by company name, DUNS® Number, Ticker Symbol or Dossier ID.

TIP: If you aren't looking for a particular company, you can also perform a search to obtain a list of all companies that match your selection of company type (e.g., public, private, parent, subsidiary), within the region(s), state or city of interest.

Company Snapshot

3 After finding the company of interest, the LexisNexis Dossier company snapshot will be displayed. The snapshot Overview includes general company information such as:

- Company contact information, including: address, phone, fax, Web address
- DUNS® Number
- Ticker symbol and stock information
- Number of employees
- Primary SIC and NAICS
- Detailed business description
- Top executives and board of directors
- Financials
- Current news

4 From the left-hand navigation, select a category to find more detailed information and reports that dive deeper into the areas of:

- Executives
- Company Hierarchy
- Competitors
- News
- Financials, including SEC Filings, SWOT Analysis, Analyst Reports
- Legal
- Intellectual Property

5 The source information is provided so you know which trusted source provided the information.

Create a List—Company

Create on-point lists of companies based on your specific criteria.

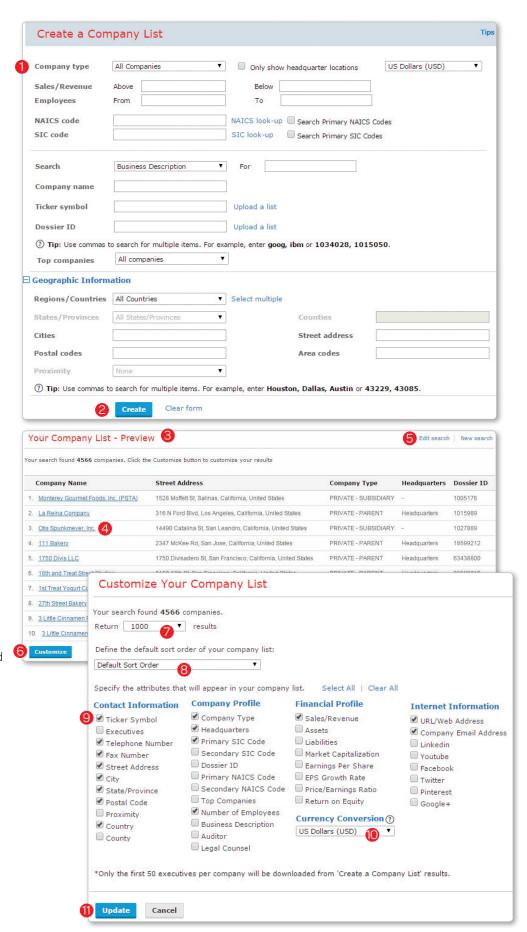**1** Enter your preferred criteria into at least one of the search fields. Your list results will be more targeted the more search criteria you provide.

2 Click **Create** to generate your list.

TIP: Click the blue **NAICS** and **SIC** links to browse and search for industry codes.

3 Review a sample of your list results in the **Preview** to ensure your list meets your needs.

4 Select the hyperlink to review the company snapshot for any of the sample companies.

5 Upon previewing, you can select **Edit Search** to further fine-tune your search, if desired.

6 When you are satisfied with your search, proceed with the creation of your list by clicking **Customize**.

7 Select the number of results to be included in your final list using the drop-down menu.

Tip: Downloads are limited to 3,000 records at a time.

8 Choose to sort order your results by **Company Name**, **Sales**, **City** and more from the drop-down menu.

9 Select the elements to be included in your company list by checking the boxes next to each attribute.

10 To change the currency in which the companies' sales are reported from the US Dollars default, click the **Currency Conversion drop-down menu** for more options.

11 Once you have selected your desired options, click **Update** at the bottom of your screen.

Create a Company List

Tips

1 Company type — All Companies — ☐ Only show headquarter locations — US Dollars (USD)

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

Search — Business Description — For

Company name

Ticker symbol — Upload a list

Dossier ID — Upload a list

⊘ **Tip:** Use commas to search for multiple items. For example, enter **goog, ibm** or **1034028, 1015050.**

Top companies — All companies

⊟ **Geographic Information**

Regions/Countries — All Countries — Select multiple

States/Provinces — All States/Provinces — Counties

Cities — Street address

Postal codes — Area codes

Proximity — None

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

2 Create — Clear form

Your Company List - Preview

3 — **5** Edit search | New search

Your search found **4566** companies. Click the Customize button to customize your results

	Company Name	Street Address	Company Type	Headquarters	Dossier ID
1.	Monterey Gourmet Foods, Inc. (PSTA)	1528 Moffett St, Salinas, California, United States	PRIVATE - SUBSIDIARY	-	1005176
2.	La Reina Company	316 N Ford Blvd, Los Angeles, California, United States	PRIVATE - PARENT	Headquarters	1015989
3.	Otis Spunkmeyer, Inc. **4**	14490 Catalina St, San Leandro, California, United States	PRIVATE - SUBSIDIARY	-	1027889
4.	111 Bakery	2347 McKee Rd, San Jose, California, United States	PRIVATE - PARENT	Headquarters	18599212
5.	1750 Divis LLC	1750 Divisadero St, San Francisco, California, United States	PRIVATE - PARENT	Headquarters	63438800
6.	18th and Treat Street Studios				
7.	1st Treat Yogurt Co				
8.	27th Street Bakery				
9.	3 Little Cinnamen				
10.	3 Little Cinnamen				

6 Customize

Customize Your Company List

Your search found **4566** companies.

Return — 1000 **7** — results

8 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 (**9**)
- ☑ Ticker Symbol
- ☐ Executives
- ☑ Telephone Number
- ☑ Fax Number
- ☑ Street Address
- ☑ City
- ☑ State/Province
- ☑ Postal Code
- ☐ Proximity
- ☑ 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) **10**

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.

11 Update — Cancel

Your Company List—Results

This screen displays your customized results list. Functionality on this screen includes:

- **Edit Search** – Revise your search criteria
- **New Search** – Start a new search
- **Save Search** – Save this search as a template
- **Customize** – Revise the fields displayed in your list
- **Company Name** – View a profile of that company
- **Download** – Check the boxes next to the company whose records you wish to download.
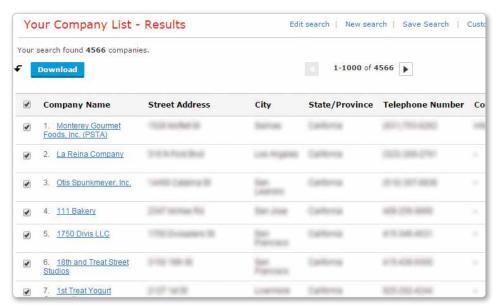
Compare Companies

1 To compare the financials of up to five companies, enter the company names or ticker symbols.

2 Click **Compare**.

TIP: Only companies traded on one of the U.S. stock exchanges can be compared using this feature.

3 The **Company Financial Comparison** report compares balance sheet, income statement and ratio information.
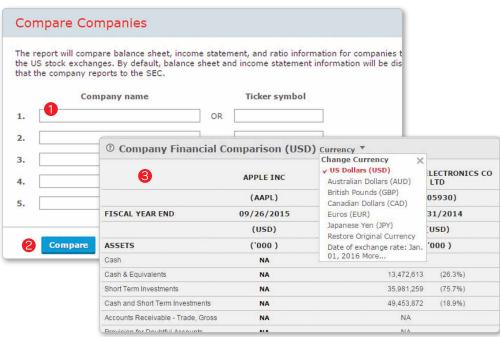
TIP: By default, the financial information will be displayed in the currency that the company reports to the SEC. The currency can be changed using the **Currency drop-down menu**.

Company Alerts

Stay current on critical changes to your important research issues by setting up alerts to provide continuous updates on companies of interest online or via email.

- After running a company search, click on the **Current News** category, and then click the **Alert** icon ⏰.
- From here, you can name your alert, select delivery options, the frequency of updates and specify who can see your alert with the **Share** option.

Your Company List - Results

Edit search | New search | Save Search | Custo

Your search found **4566** companies.

[Download] 1-1000 of 4566

☑	Company Name	Street Address	City	State/Province	Telephone Number	Co
☑	1. Monterey Gourmet Foods, Inc. (PSTA)			California		
☑	2. La Reina Company		Los Angeles	California		
☑	3. Otis Spunkmeyer, Inc.		San Leandro	California		
☑	4. 111 Bakery		San Jose	California		
☑	5. 1750 Divis LLC		San Francisco	California		
☑	6. 18th and Treat Street Studios		San Francisco	California		
☑	7. 1st Treat Yogurt		Livermore	California		

Compare Companies

The report will compare balance sheet, income statement, and ratio information for companies t the US stock exchanges. By default, balance sheet and income statement information will be dis that the company reports to the SEC.

	Company name		Ticker symbol
1.		OR	
2.			
3.			
4.			
5.			

2 [Compare]

ⓘ Company Financial Comparison (USD) Currency ▼

Change Currency ✕
✓ US Dollars (USD)
Australian Dollars (AUD)
British Pounds (GBP)
Canadian Dollars (CAD)
Euros (EUR)
Japanese Yen (JPY)
Restore Original Currency
Date of exchange rate: Jan. 01, 2016 More...

	APPLE INC	...ELECTRONICS CO LTD
	(AAPL)	(05930)
FISCAL YEAR END	09/26/2015	31/2014
	(USD)	(USD)
ASSETS	('000)	'000)
Cash	NA	
Cash & Equivalents	NA	13,472,613 (26.3%)
Short Term Investments	NA	35,981,259 (75.7%)
Cash and Short Term Investments	NA	49,453,872 (18.9%)
Accounts Receivable - Trade, Gross	NA	NA
Provision for Doubtful Accounts	NA	NA

Create New Alert ✕

Alert Name *(Required)*
[Enter up to 100 characters]

Frequency
- ● Daily [Monday - Friday ▼] [1 ▼] time(s) per day at [8:00 ▼]
- ○ Weekly
- ○ Monthly
- ○ Manually

Time Zone
[Eastern Time (GMT-5:00) ▼]
*Daylight Savings Time not observed

Delivery Type
- ● Email to [Enter up to 3 email addresses, separated by commas or spaces.]

Email delivery is subject to Terms & Conditions. [Create] [Cancel]

Create a
Company Report

1 To generate a custom report, simply click the **Custom Report button** above the company snapshot. The report will be easy to navigate with text links on the first page.

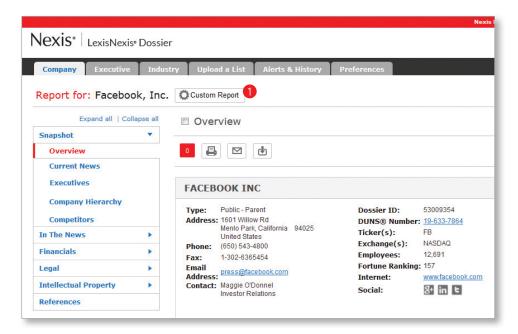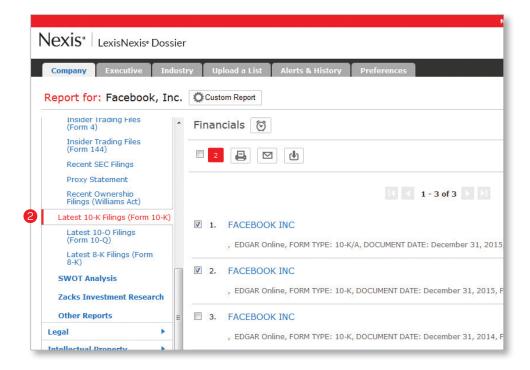**2** Use search links to conduct a search for a company's latest 10K, 10Q or 8K documents, with the option to append these to the end of the company report. You can also set **Alerts** for these three content categories.

❸ Select **Financial Overview** to get a concise, high-level view of the last three years of a company's annual financial data in a side-by-side comparison chart.

❹ **Click Company Hierarchy** to include the updated company hierarchy view in your report, designed for enhanced readability.

❺ Stock charts will populate in the custom report when you select the **Overview checkbox**.

❻ You also have the option to add full-text documents to the end of the report, as well as citations with links, for faster access to relevant information.

❸ **Yearly Financials**

	2013	2014	2015
Net Income[1] (USD)	1,500,000	2,940,000	3,688,000
Net Sales[1] (USD)	7,872,000	12,466,000	17,928,000
Total Assets[1] (USD)	17,895,000	39,966,000	49,407,000
Total Liabilities[1] (USD)	2,425,000	3,870,000	5,189,000

1 - Reuters Knowledge Direct November 14, 2016 Copyright 2016 Thomson Financial, All Rights Reserved

❹ **Company Hierarchy**

Facebook, Inc. (Parent) - Menlo Park, CA

Atlas (Subsidiary) - Seattle, WA

Atlas (Branch) - San Francisco, CA

Atlas-Asia/Pacific Office (Non-U.S. Branch) - Pyrmont

Instagram, Inc. (Subsidiary) - San Francisco, CA

Karma Science, Inc (Subsidiary) - San Francisco, CA

Oculus VR, LLC (Subsidiary) - Irvine, CA

Parse, LLC (Subsidiary) - Menlo Park, CA

Vitesse, LLC (Subsidiary) - Prineville, OR

WhatsApp Inc. (Subsidiary) - Mountain View, CA

Edge Network Services Limited (Non-U.S. Subsid

Facebook Ireland Holdings Limited (Shell) -

Facebook Ireland Limited (Shell) -

Facebook Operations, LLC (Shell) -

❺ Closing Price

Volume (millions of shares)

Daily: December 30, 2015 to December 29, 2016

Source: SunGard FAME

Source: SunGard PowerData™ (Tradeline ®) Pricing and Chart.
Quotes delayed at least 15 minutes per the respective stock exchanges.

Nexis Home |

Nexis | LexisNexis® Dossier

| Company | Executive | Industry | Upload a List | Alerts & History | Preferences |

Report for: Facebook, Inc.

Edit search | New search | Save search

Custom Report

Select the Company Dossier sections you want to include in your company report. Select All | Clear All

Snapshot
- ❺ ☑ Overview
- ☑ Current News*
- ☑ Full Executive Lists
  - ☑ Corporate Affiliations
- ❹ ☑ Company Hierarchy
- ☑ Competitors

Financials
- ❸ ☐ Financial Overview

SEC Filings *
- ☐ Executive Compensation
- ☐ Corporate Articles & Bylaws
- ☐ Corporate Material Contracts
- ☐ Insider Trading Files (Form 4)
- ☐ Insider Trading Files (Form 144)
- ☐ Recent SEC Filings
- ☐ Proxy Statement
- ☐ Recent Ownership Filings (Williams Act)
- ☐ Latest 10-K Filings (Form 10-K)
- ☐ Latest 10-Q Filings (Form 10-Q)
- ☐ Latest 8-K Filings (Form 8-K)

Company Reports
- ☐ SWOT Analysis*
- ☐ Additional Company Reports

Company Activities *
- ☐ Mergers
- ☐ Corpfin Worldwide

Investment Research *
- ☐ Analyst Reports
- ☐ Zacks Investment Research

News *
- ☐ Top Publication
  - ☐ Major Newspapers
  - ☐ Press Release
  - ☐ Magazines
  - ☐ Transcripts
  - ☐ Legal Publications
- ☐ Topic
  - ☐ Business Activity
  - ☐ Corporate Structure
  - ☐ Financial
  - ☐ Legal
  - ☐ Marketing and Product
- ☐ Region
  - ☐ United States
  - ☐ Canada, Central America and South America
  - ☐ European
  - ☐ Asia and the Pacific Rim
  - ☐ Middle East and Africa

Legal *
- ☐ Recent Cases
  - ☐ Recent United States Cases
  - ☐ Recent Canada Cases
  - ☐ Recent UK Cases
  - ☐ Recent Commonwealth & Irish Cases
- ☐ Mealey's Reports
- ☐ Directory Information
  - ☐ Martindale-Hubbell Corporate Counsel
  - ☐ Martindale-Hubbell Outside Counsel

Intellectual Property *
- ☐ Patents
  - ☐ Recent United States Patents
  - ☐ Recent European Patents
  - ☐ Recent Japanese Patents
- ☐ Trademarks
  - ☐ Recent United States State Trademarks
  - ☐ Recent United States Federal Trademarks
  - ☐ Recent International Trademarks
- ☐ Copyrights
  - ☐ Recent United States Copyrights

More Options

*Return [10 ▾] items in the cite list

❻ ☑ Include full document

[Generate PDF Report] [Cancel]

LexisNexis®
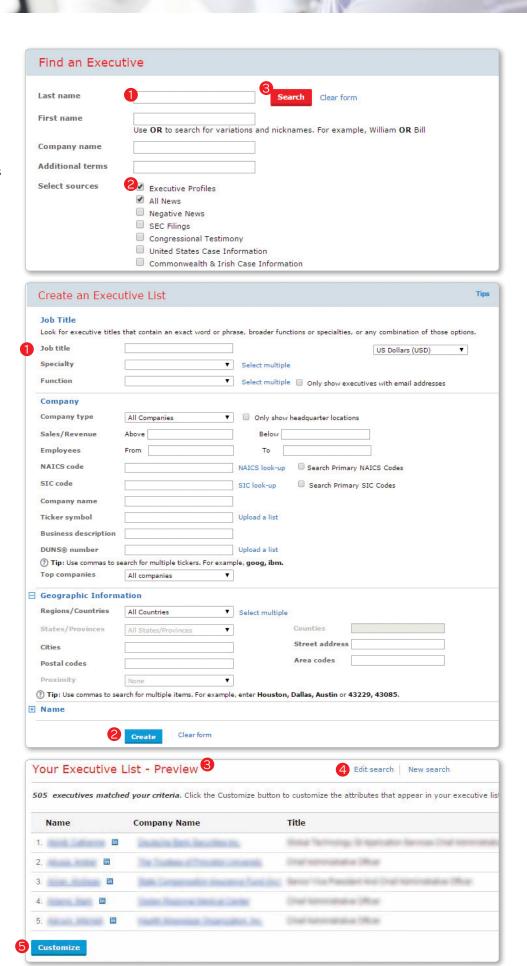# Executive Dossier

Find an Executive

The Find an Executive tab within LexisNexis Dossier allows you to access profiles of key executives.

① Enter the last name you are searching for. First name, company and additional terms (e.g., title) are optional

② Select the types of information you would like included in your search using the check boxes next to each category.

③ Click **Search**.

Create a List—Executive

Create on-point lists of executives based on your specific criteria.

① Enter your preferred criteria into at least one of the search fields. Your list results will be more targeted the more search criteria you provide.

TIP: **Job Title** search fields help to create a precise list, including Specialty, which relates to department (e.g., human resources) and Function, which relates to the level of seniority (e.g., director). Click **Select Multiple** to choose multiple specialties or multiple functions.

② Click **Create** to generate your list.

③ Review a sample of your list results in the **Preview** to ensure your list meets your needs.

④ Upon previewing, you can select **Edit Search** to further fine-tune your search, if desired.

⑤ When you are satisfied with your search, proceed with the creation of your list by clicking **Customize**.

Find an Executive

Last name	**③** Search Clear form
First name	
	Use **OR** to search for variations and nicknames. For example, William **OR** Bill
Company name	
Additional terms	
Select sources	**②** ☑ Executive Profiles
	☑ All News
	☐ Negative News
	☐ SEC Filings
	☐ Congressional Testimony
	☐ United States Case Information
	☐ Commonwealth & Irish Case Information

Create an Executive List   Tips

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

① Job title _____   US Dollars (USD) ▼

Specialty _____ ▼   Select multiple

Function _____ ▼   Select multiple ☐ Only show executives with email addresses

Company

Company type   All Companies ▼   ☐ 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, **goog, ibm.**

Top companies   All companies ▼

⊟ Geographic Information

Regions/Countries   All Countries ▼   Select multiple

States/Provinces   All States/Provinces ▼   Counties _____

Cities   _____   Street address _____

Postal codes   _____   Area codes _____

Proximity   None ▼

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

⊞ Name

② Create   Clear form

Your Executive List - Preview **③**   **④** Edit search | New search

505 executives matched your criteria. Click the Customize button to customize the attributes that appear in your executive list

Name	Company Name	Title
1.		
2.		
3.		
4.		
5.		

⑤ Customize

6 Select the number of results to be included in your final list using the drop-down menu.

7 Choose to sort order your results by **Executive Name**, **Company Name**, **Sales**, **City** and more from the drop-down menu.

8 Select the elements to be included in your company list by checking the boxes next to that attribute.

9 To change the currency in which the companies' sales are reported from the US Dollars default, click the **Currency Conversion drop-down menu** for more options.

10 Once you have selected your desired options, click **Update** at the bottom of your screen.
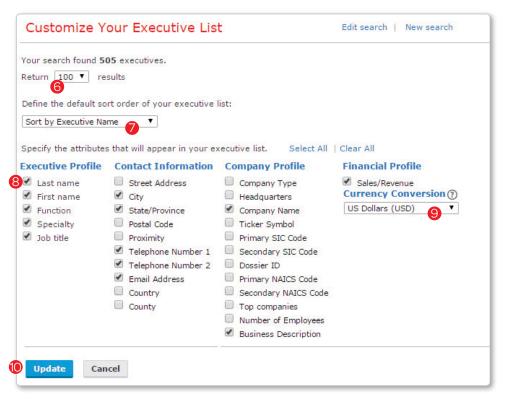
Your Executive List—Results

This screen displays your customized results list. Functionality on this screen includes:

- **Edit Search** – Revise your search criteria
- **New Search** – Start a new search
- **Save Search** – Save this search as a template
- **Customize** – Revise the fields displayed in your list
- **Executive Name** – View news or reports on that person
- **LinkedIn Integration** – Search for that person within LinkedIn
- **Company Name** – View a profile of that company
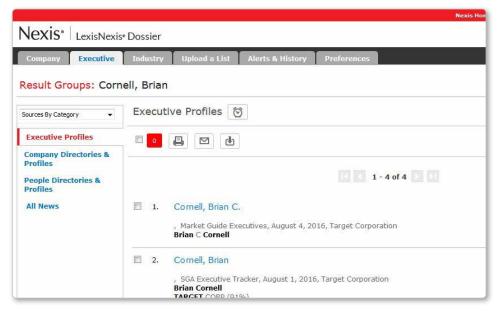- **Download** – Check the boxes next to the people whose records you wish to download.

Executive Alerts

After running an executive search, click on the **Current News** category, and then click the **Alert** icon ⏰ to schedule automatic updates.

You will be notified when something new becomes available for the executive you have chosen to follow.

Customize Your Executive List

Edit search | New search

Your search found **505** executives.

Return 100 ▼ results

Define the default sort order of your executive list:

Sort by Executive Name ▼

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

Executive Profile
- ☑ Last name
- ☑ First name
- ☑ Function
- ☑ Specialty
- ☑ Job title

Contact Information
- ☐ Street Address
- ☑ City
- ☑ State/Province
- ☐ Postal Code
- ☐ Proximity
- ☑ Telephone Number 1
- ☑ Telephone Number 2
- ☑ Email Address
- ☐ Country
- ☐ County

Company Profile
- ☐ Company Type
- ☐ Headquarters
- ☑ Company Name
- ☐ Ticker Symbol
- ☐ Primary SIC Code
- ☐ Secondary SIC Code
- ☐ Dossier ID
- ☐ Primary NAICS Code
- ☐ Secondary NAICS Code
- ☐ Top companies
- ☐ Number of Employees
- ☑ Business Description

Financial Profile
- ☑ Sales/Revenue

Currency Conversion ⓘ

US Dollars (USD) ▼

[**Update**] [Cancel]

Your Executive List - Results

Edit search | New search | _ Save Search | Customize

505 executives matched your criteria. To save your results, click the Download Selected Items button. To learn more about

[**Download**]   ◀ 1-100 of 505 ▶

	Name	Company Name	First name	Last name	Title
☑	1.				
☑	2.				
☑	3.				
☑	4.				

Nexis | LexisNexis Dossier

Company | Executive | Industry | Upload a List | Alerts & History | Preferences

Result Groups: Cornell, Brian

Sources By Category ▼

- **Executive Profiles**
- **Company Directories & Profiles**
- **People Directories & Profiles**
- **All News**

Executive Profiles ⏰

☐ 0 🖨 ✉ 📥

1 - 4 of 4

☐ 1. Cornell, Brian C.
, Market Guide Executives, August 4, 2016, Target Corporation
Brian C **Cornell**

☐ 2. Cornell, Brian
, SGA Executive Tracker, August 1, 2016, Target Corporation
Brian Cornell
TARGET CORP (91%)

LexisNexis®
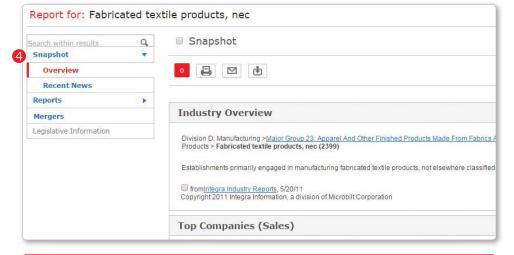# Industry Dossier

Find an Industry

The Find an Industry tab allows you to research and learn more about a specific industry.

1 Enter a **Keyword** or **SIC code** to retrieve information on more than 1,200 industries.

2 Click **Search**.

3 Select the industry by clicking on the name of that industry.

4 In the **Industry Snapshot**, choose from different reports and news categories on the left-hand panel. Content includes:

- **Snapshot** – Concise industry overview that can include industry overview, top companies by sales, ratio components and market performance indicators
- **Recent News** – Recent news related to the industry
- **Reports** – Industry Reports by country include competitive landscape, leading companies, even forecast value
- **Mergers** – Find information about the top mergers (by price offered)
- **Legislative Information** – Browse recent U.S. Congressional bills that pertain to the industry

Find an Industry

Terms [   ] ❶ Enter a complete or partial industry name (for example, metal). ❷ **Search** Clear Form

SIC [   ] Use commas to separate multiple 2-4 digit SIC codes.

Industry Dossier - Results

Your search found 28 related industries. Select an industry name below to view its dossier reports.

	SIC Code	Industry
1.	22	Textile Mill Products
2.	2231	Broadwoven fabric mills, wool
3.	2251	Women's hosiery except socks
4.	2252	Hosiery, nec
5.	2253	Knit outerwear mills
6.	2254	Knit underwear mills
7.	2257	❸ Weft knit fabric mills

Report for: Fabricated textile products, nec

Search within results 🔍

❹ Snapshot ▾
  Overview
  Recent News
Reports ▸
Mergers
Legislative Information

☐ Snapshot

Industry Overview

Division D: Manufacturing >Major Group 23: Apparel And Other Finished Products Made From Fabrics A Products > **Fabricated textile products, nec (2399)**

Establishments primarily engaged in manufacturing fabricated textile products, not elsewhere classified

☐ fromIntegra Industry Reports, 5/20/11
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Top Companies (Sales)

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