

SDC PLATINUM ADD-ON

USER GUIDE

Product 1.5



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About this Document

Intended readership

This document is intended for users of the Refinitiv Workspace SDC Platinum Add-on.

In this document

This user guide introduces Refinitiv Workspace's add-on premium deals offering, SDC Platinum. This service can be hosted via desktop or web, and contains Industry Standard League Tables and content across new issues, M&A, syndicated loans, private equity, project finance, public finance (Munis), poison pills, shareholder activism, repurchases and joint ventures and strategic alliances.

Support and Feedback

For help and support across all Refinitiv products, access your [MyRefinitiv](#) portal or work directly with your client success management and account management team.

Sign in to or register with MyRefinitiv by going to the following web page:

<https://my.refinitiv.com/content/mytr/en/signin.html/>

The screenshot shows the 'Welcome to MyRefinitiv' portal. At the top right is a blue 'Get Support' button. The main content area is divided into two columns. The left column, titled 'SIGN IN', includes a language selection dropdown (currently set to 'English') and a large orange 'Sign In' button. Below this is a link for 'Access through your private network' with a right-pointing arrow. The right column, titled 'REGISTER', lists four bullet points: 'View product guides, videos and FAQs', 'Find answers and get support', 'View Notifications and Alerts', and 'Access invoices and much more'. Below the list is a link 'Want to experience it yourself? Watch this video' and a 'Register' button. At the bottom, a blue banner contains three sections: 'SMARTER SUPPORT' (Find answers fast, raise queries), 'STAY INFORMED' (View Data, Instrument and Product Change Notifications, Service Alerts), and 'ACCESS' (Over 100 Product Pages with FAQs, guides, videos and software downloads, Third Party data pages, Online billing and much more).

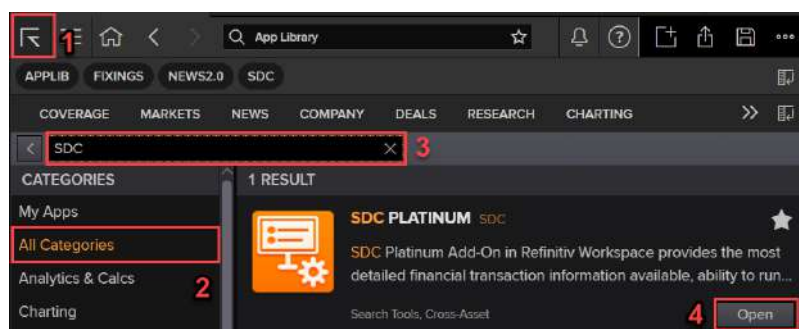
Chapter 1 – Overview

Accessing SDC Platinum

Log in to Refinitiv Workspace with the credentials provided by your Client Success Manager or welcome email. Only permitted users can view and open SDC Platinum.

Open using the App Library

1. Click the **Refinitiv** icon in the top menu bar and select **App Library** from the list, or click **APPLIB** in the bookmark menu bar.
2. Select **All Categories** from the Categories menu.
3. Type the shortcode **SDC** in the APPLIB search bar. The SDC Platinum app displays.
4. Click the **Open** button.



Open using the Deals menu

Clients with Banking Profiles set up will see **Deals** on the Workspace menu.

Click **Deals** in the menu bar and select **SDC Platinum** from the list.



Open using the search bar

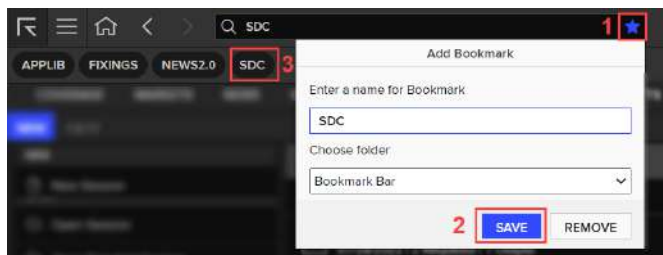
1. In the search bar, type the shortcode **SDC**. The menu returns all natural language searches with “SDC” in context.
2. Select **SDC Platinum** from the list to open the app.



Bookmarking SDC Platinum Add-on

1. Select the **Favorites** (star) icon for SDC in the search bar.

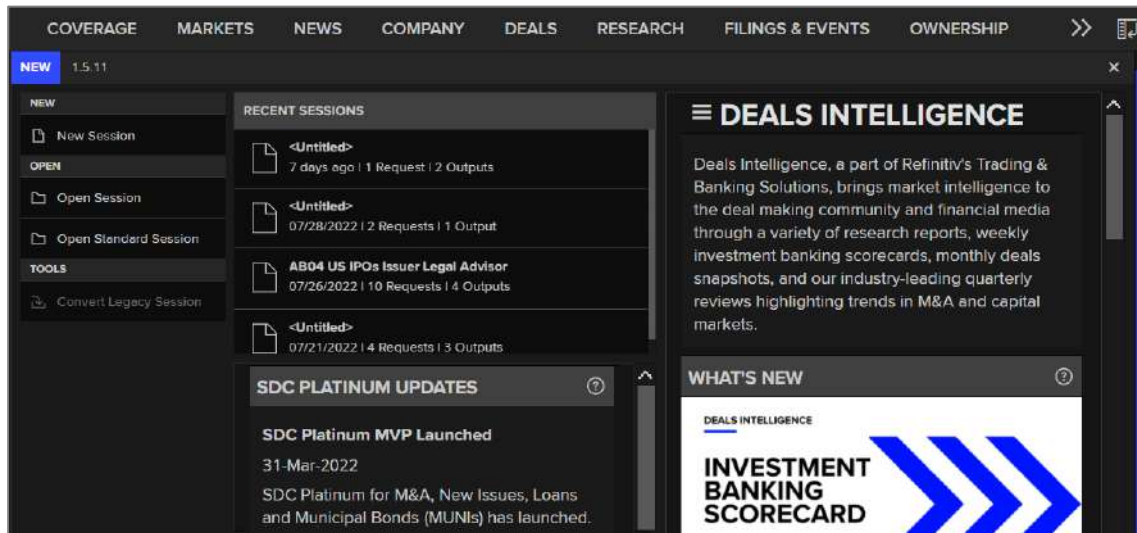
2. Name the bookmark and click the **Save** button. The SDC bookmark displays in the bookmark menu.



Chapter 2 – Getting started

On opening the SDC Platinum Add-on, the landing page displays.

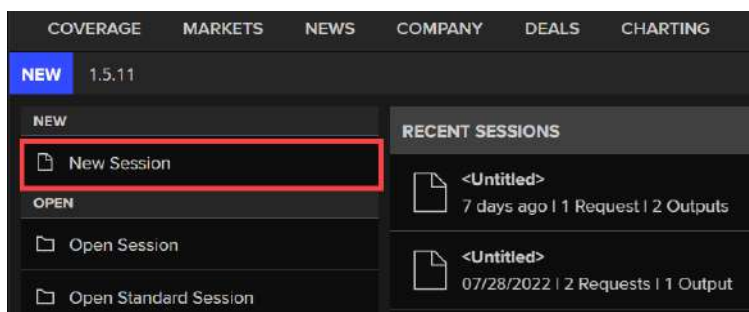
The appearance of the landing page can be charcoal or white, depending on your Workspace color and theme settings.



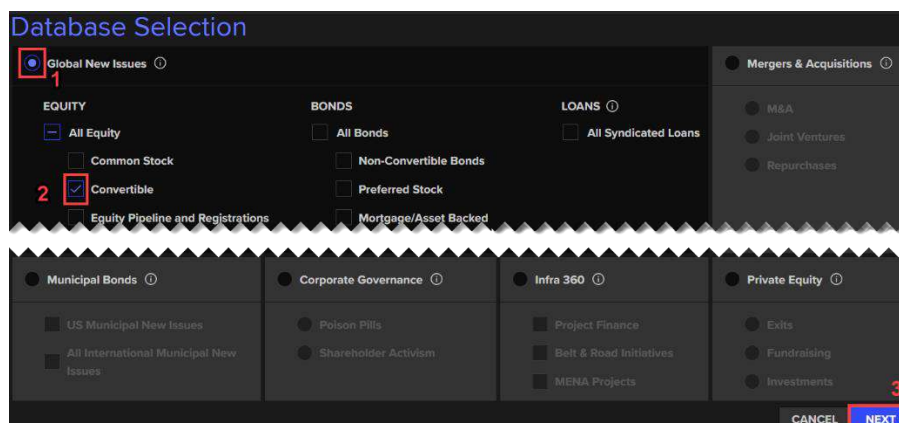
Creating a new session

New sessions are based on a selected dataset, and can have reports, league tables and volume analysis run against them.

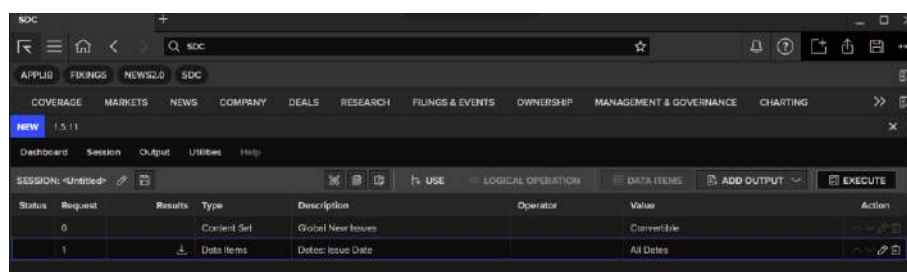
1. Click **New Session**. The Database Selection screen displays, showing all the data available to query. If you don't have permission for a dataset, it will be disabled.



2. Select the option button of the database you want and check the boxes of the database options you want. Click **Next**.



A new session page opens for the selected content set.



Building a search for data items

A new session displays the content set selected and provides a Date data item to begin your search. You can double-click the Date to change it from All Dates (entire history) to a selected data range.

Double-clicking a data item field in the session list opens its details panel in the data item library. It can then be edited.

The library categorizes data items by the filter tab. The filter's default setting is **All Items**. Each filter displays the number of items it includes. These results are filtered (decrease) by the search as you create it.

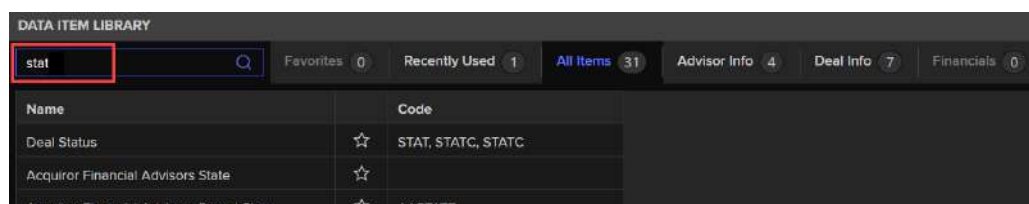
You can search for data items using:

- Text
- Filters, including Favorites and Recently Used
- Workspace codes or heritage SDC codes
- Alias keywords

To build a search by text or keyword

Type a partial phrase or word in the data items library Search field. This can be the name of the data item, or an alias – a keyword that is associated with the data item. The longer or more complete the entry is, the more exact the auto-suggest search results are.

The example below shows the results for the search term 'stat'. The filters display the number of relevant results:



To build a search by filter

- Select the **Favorites** filter to display selected favorites (starred data items)
- Select the **Recently Used** filter to view the last 50 used data items from previous searches.
- Select a filter to view the data items for that filter. The example below shows the **Advisor Info** filter tab selected:

DATA ITEM LIBRARY		
Search all data items	Q	
Favorites 5	Recently Used 12	All Items 1594
Advisor Info 160	Deal Info 456	Financials 495
Name		Code
Acquiror Due Diligence Advisor	☆	AACC
Acquiror Due Diligence Advisor Code	☆	AACCC
Acquiror Financial Advisor Code	☆	AAA_AACODE, AAA_AACODE_...
Acquiror Financial Advisor Assignments	☆	AASSIGNC, AASSIGNC_ELIG, AA...
Acquiror Financial Advisor Client	☆	AA_CLIENT

To build a search by code

- Type the whole or a partial Workspace code in the data items library Search field. The longer or more complete the entry is, the more exact the autosuggest search results are. The example below uses the code for the data item **Rank Value inc. Net Debt of Target**, which is **RANKVAL**:

DATA ITEM LIBRARY		
RankVal	Q	
Favorites 0	Recently Used 0	All Items 3
Advisor Info 0	Deal Info 1	
Name		Code
Rank Value inc. Net Debt of Target	☆	EURO_RANKVAL, HOST_RANKV...
Rank Value inc. Net Debt of Target at Effective ...	☆	RANKVALEFF
Ranking Value Flag	☆	RANKVAL_FLAG

- Type the whole heritage SDC code in the data items library Search field to get an exact match. The search will not return heritage code results for a partial match.

Adding data items to a session

After building your search, you can select and edit the data item you want.

1. Select the data item. The details pane on the right side populates with the item's definitions, details, and options.

DATA ITEM LIBRARY		
Stat	Q	
Favorites 0	Recently Used 1	All Items 31
Advisor Info 4	Deal Info 2	Financials 0
Participant Info 1		
Name		Code
Deal Status	☆	STAT, STATC, STATC
Acquiror Financial Advisors State	☆	
Acquiror Financial Advisors Parent State	☆	AASSTATE
Target Financial Advisors State	☆	
Target Financial Advisors' Parent State	☆	TASTATE
Related M&A Deal Status	☆	ROSTATUS, ROSTATUSCODE, R...
State where Users Governing Deal are Applic...	☆	LAWC
Proxy Statement Date	☆	
Selected Legal Status	☆	SEL_LEGAL_STATUS, SEL_LEGAL...

DEAL STATUS	
Deal Status: Most recent status of the transaction. Status codes are grouped into 5 categories: Completed, Pending, Tentative, Unknown, and Withdrawn. When selected, these 5 categories are expandable and correspond to the following status cod... See more	
Mergers & Acquisitions → Deal Info	
Select:	
Action:	<input checked="" type="radio"/> Include <input type="radio"/> Exclude

2. Make any edits you want to the data item information and click **OK**. The data item is added to the session.

Creating an output (multiple outputs)

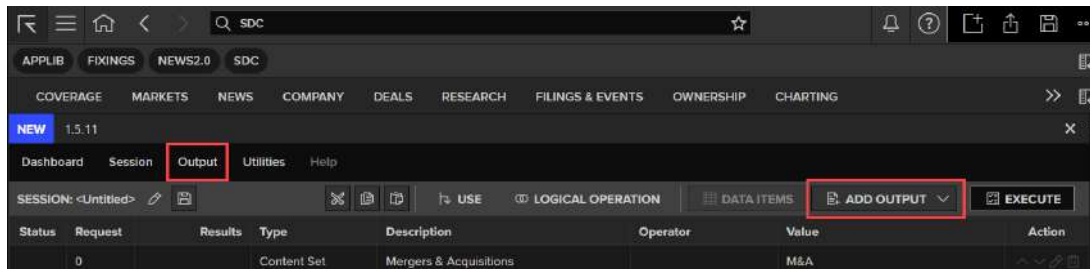
There are three output types:

- Reports — which create deal lists

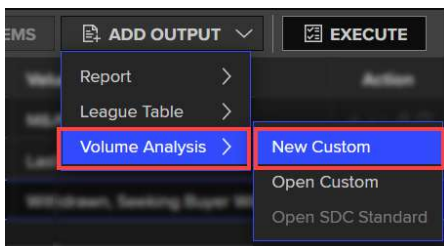
- League Tables — which apply a Refinitiv Standard League Table ranking or create a custom ranking
- Volume Analysis — which apply a Refinitiv output or create a custom volume analysis

To create an output:

1. Ensure you have added all the data inputs you want in your session.
2. Click the **Output** option or the **Add Output** button on the session menu bar.



3. Select the **Report**, **League Table**, or **Volume Analysis** option from the dropdown list.
4. Select one of the following for the output:
 - **New Custom**: create a new output item
 - **Open Custom**: load a saved output item
 - **SDC Standard**: select a standard output provided by Refinitiv



5. Select the options required or load a file for the output item.
6. Click **Next** on the output menu bar. The new output item is added to the session.

Status	Request	Results	Type	Description	Operator	Value	Action
	0		Content Set	Mergers & Acquisitions		M&A	^ v [icon]
✓	1	1380244 [icon]	Data Items	Date Announced		All Dates	^ v [icon]
✓	2	19853 [icon]	Data Items	Deal Value (Cum=USD, Scale=6, Include...	Greater Than Or Equal	900.00	^ v [icon]
✓	3	14218 [icon]	Data Items	Deal Status	Include	Completed	^ v [icon]
	4	[icon]	Output	League Table: <Untitled>			^ v [icon]

7. To create multiple outputs, go to **step 2** above and repeat until finished.

Chapter 3 – Helpful Utilities

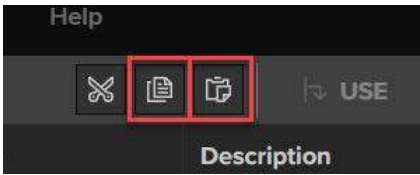
Copying and pasting requests

In your requests window, you can copy and paste the listed data items and output rows. The pasted item will be an exact copy of the original and can be edited.

- 1. In the request window, select the data items or output row you want.

SESSION: Session01					
Status	Request	Results	Type	Description	Oper
	0		Content Set	Mergers & Acquisitions	
	1	↓	Data Items	Date Announced	
	2	↓	Data Items	Rank Value Inc. Net Debt of Target (Curn...	Great
	3	↓	Output	Report: Report01	

- 2. Click the **Copy**, and then the **Paste** button.




- 3. The copied row displays below the original.

SESSION: Session01					
Status	Request	Results	Type	Description	Oper
	0		Content Set	Mergers & Acquisitions	
	1	↓	Data Items	Date Announced	
	2	↓	Data Items	Rank Value inc. Net Debt of Target (Curn...	Great
	3	↓	Data Items	Rank Value inc. Net Debt of Target (Curn...	Great
	4	↓	Output	Report: Report01	

Saving a session

SDC Platinum sessions can be saved, and then reused or shared. The saved files use the **.SDCS** suffix.

- 1. Include in your session all data items, logical sets and outputs you want to save.
- 2. Click the **Save** icon on the session menu bar to open the Save Session dialog.

Dashboard Session Output Utilities Help				
SESSION: M&A-Session01 				
Sta...	Requ...	Results	Type	Description
	0		Content Set	Mergers & Acquisitions
	1	↓	Data Items	Date Announced
	2	↓	Data Items	Rank Value inc. Net Debt of Target (Curn

3. Type the name you want in the Session Name field and click **Save**.

Save Session?

Session Name

M&A Session13

SAVE

DON'T SAVE

CANCEL

The file is saved in the folder specified in your browser settings.

Use Request and Logical Sets







Use Request and Logical Sets are features that all for very granular searches leveraging filters and applying Boolean logic.

Overview

Use requests and logical operations allow SDC Platinum users to reuse existing session requests and create union, intersect, or subtract groups of content based on search requests. This helps SDC Platinum users to build complex searches.

Use request

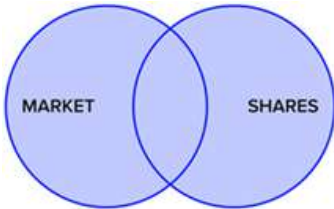
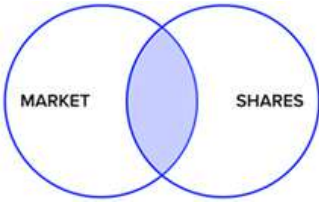
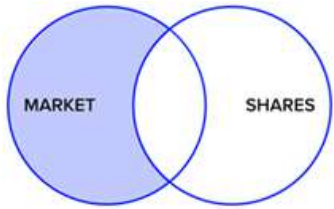
The Use functionality allows you to reference the universe of deals up to that requested data item. It enables you to return to the data item, or search request, and start filtering the universe from it.

SESSION: <Untitled>      							
Status	Request	Results	Type	Description	Operator	Value	Action
	0		Content Set	Mergers & Acquisitions		M&A	^ v ⚙
✓	1	33801 ↓	Data Items	Date Announced		Year To Date	^ v ⚙
✓	2	21933 ↓	Data Items	Deal Status	Include	Completed	^ v ⚙
✓	3	33801 ↓	Use Request	Use Request 1		Date Announced: Year To Date	^ v ⚙
✓	4	8403 ↓	Data Items	Target Nation	Include	United States	^ v ⚙

Note: The Use button is enabled only for data item requests. It is disabled for output requests.

Types of logical operations

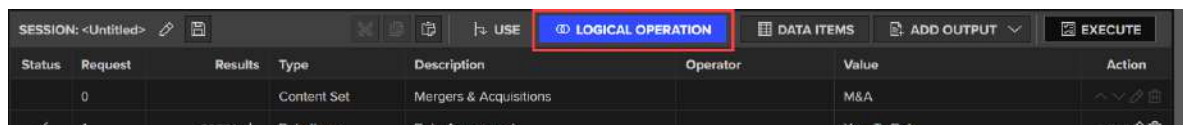
The logical operations in SDC Platinum use Boolean logic. There are three available operations:

Union (OR)	Intersection (AND)	Difference (MINUS)
<p>You can combine the results of two or more requests (OR).</p> <p>For example, using OR, this search retrieves results with Market, Shares, and both.</p>	<p>By default, the logical operation applied to screening criteria in a session is intersection.</p> <p>With intersection, you can find the common transactions in two or more requests (AND).</p> <p>For example, using AND, this search retrieves results with Market and Shares.</p>	<p>You can subtract the transactions in one or more search requests from another (MINUS).</p> <p>Remember to enter the sequence numbers in the correct order — the request from which you want to subtract transactions needs to be 1st.</p> <p>For example, using NOT, this search retrieves results with Market, and excludes those with Shares or Market with Shares.</p>
		

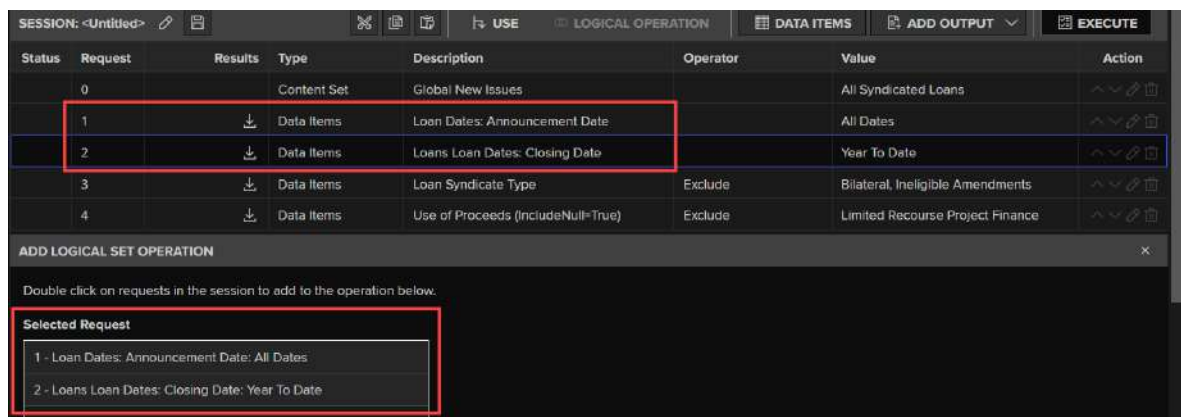
Adding logical operations to use requests

To add logical operation to the Session View:

1. Click **Logical Operation** on the header pane of Session View.



2. Double click the requests to move them from the Session View into the Logical Operation box.



3. Select either the **Union (OR)**, **Intersection (AND)**, or **Difference (MINUS)** logical operation option and click **OK**.

ADD LOGICAL SET OPERATION

Double click on requests in the session to add to the operation below.

Selected Request

1 - Loan Dates: Announcement Date: All Dates

2 - Loans Loan Dates: Closing Date: Year To Date

☒ Union (OR)

☐ Intersection (AND)

☐ Difference (MINUS)

CANCEL

OK

The Logical Operation request is added to the Session View.

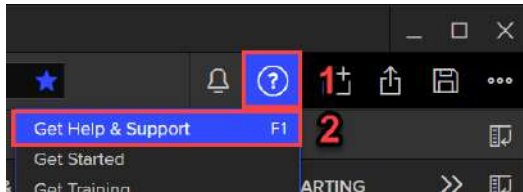
SESSION: <Untitled>							
LOGICAL OPERATION							
Status	Request	Results	Type	Description	Operator	Value	Action
0			Content Set	Global New Issues		All Syndicated Loans	
1			Data Items	Loan Dates: Announcement Date		All Dates	
2			Data Items	Loans Loan Dates: Closing Date		Year To Date	
3			Data Items	Loan Syndicate Type	Exclude	Bilateral, Ineligible Amendments	
4			Data Items	Use of Proceeds (IncludeNull=True)	Exclude	Limited Recourse Project Finance	
5			Logical Set	Logical Set Operation	Union	Request 1 OR 2	

Chapter 4 – Further Help

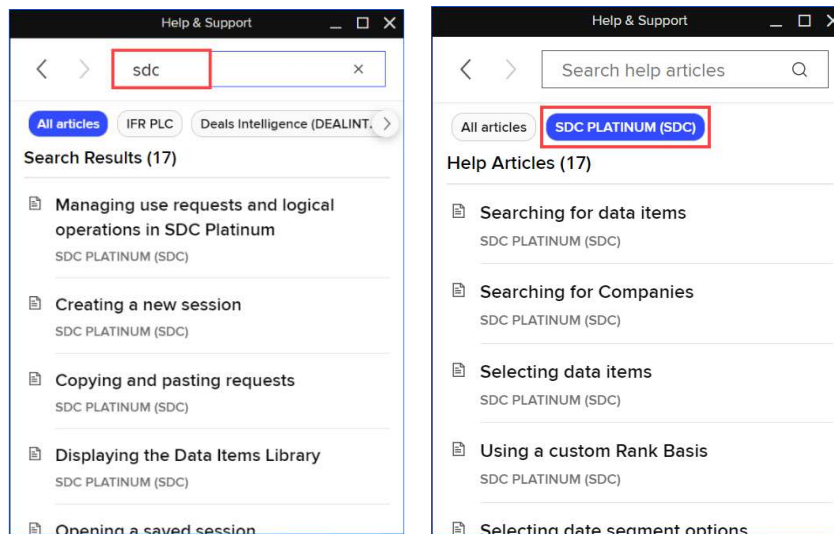
Accessing in-product help

Refinitiv Workspace has extensive in-product help that is available to all viewers.

1. Select the **Help (?)** icon in the top right corner of your screen.
2. Select **Get Help & Support** from the list. The Help Welcome screen displays in a popup window.



3. When you click in the search field, the articles screen displays. Type **SDC** in the search field to see most frequently asked SDC help questions.
4. If you have the SDC Platinum Add-on open, a filter for it displays. Click the **SDC Platinum (SDC)** filter to display all SDC specific articles.



Additional online help articles

SDC Help Articles	Link
Adding Volume Analysis statistics (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211403.html
Copying and pasting requests (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211368.html
Creating a new session (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211266.html
Creating multiple outputs (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211405.html
Displaying the Data Items Library (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211371.html
Opening a saved session (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211372.html
Opening a standard session (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211373.html
Saving a session (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211411.html
Searching for Companies (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211440.html
Searching for data items (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211439.html
Selecting data items (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211441.html
Selecting date segment options (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211569.html
Selecting relative dates (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211574.html
Using a custom Rank Basis (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000211442.html
Adding statistics output in SDC Platinum (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000215323.html
Assigning & removing custom drilldown templates	https://my.refinitiv.com/content/mytr/en/faqs/000215042.html
Creating a league table in SDC Platinum (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000215145.html
Creating a report in SDC Platinum (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000215044.html
Creating a volume analysis in SDC Platinum (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000215146.html
Creating a volume analysis in SDC Platinum (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000215147.html
Exporting to Excel in SDC Platinum (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000215075.html
Searching for data items using heritage SDC codes (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000214914.html
Using the date picker (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000215185.html
Selecting issuer rankings in SDC Platinum (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000215324.html
Using drilldowns in SDC Platinum (SDC) 5	https://my.refinitiv.com/content/mytr/en/faqs/000215076.html
Viewing a full deal list report underpinning a Volume Analysis or League Table (SDC)	https://my.refinitiv.com/content/mytr/en/faqs/000215325.html

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