Company reports toolkit part 2

Administration instructions for editing on SCoRe

Main searching features

To begin an editing session data must be selected from the database. A search can be conducted on one or a combination of the following criteria:

- Company name
- Collection
- Ranking
- FT sector
- Date received
- SCoRe ID
- Report types
- Year of report
- Country
- Address of company
- Date modified

SCoRe Administration Tools – containing all of the searching features

SCoRe Administration

SCoRe

Logout

SCoRe Administration Tools

Search for reports / update collection dates

Company

SCoRe ID

Collections*

All
British Library
London Business School
Manchester Business School
Strathclyde University
Warwick University

Report Types*

All
10K
Annual report and accounts
Environmental report
Interim report

Rankings — All

Year

FT sector — All

Country — All

Date Received — From / / To / /

Address

Search | Clear | Export for Mailing | Perform Updates

*Collections and Report Types: Use Ctrl+click to select individual items or Shift+click to select a range of items.

Search for modified records

Collection — London Business School

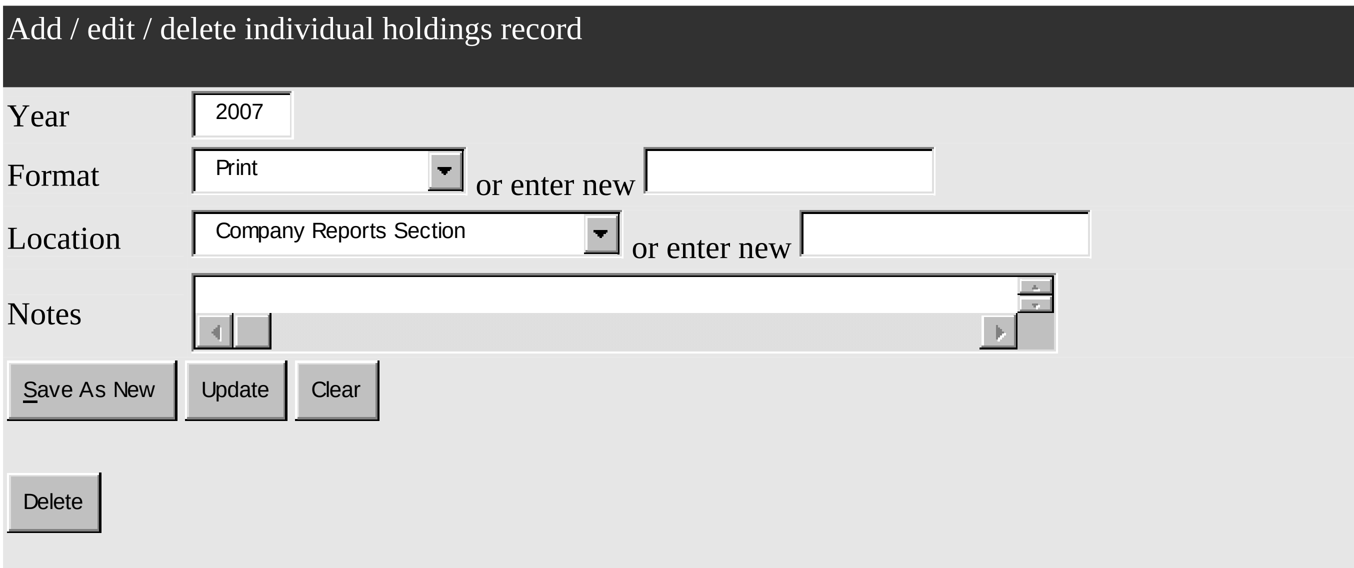
Date Modified — From / / To / /

Search | Clear

Entering annual reports

- Open up the SCoRe database editing interface, preferably in Microsoft Internet Explorer
- To log into the admin system, go to the SCoRe admin home page and enter login details. To obtain login information for your collection contact the SCoRe administrator
- The main ‘SCoRe Administration Tools’ screen will appear
- Type part of the company name in the search company name field. Do not restrict the search to one collection only (the company may already exist to which another collection’s holdings can be added)
- If the company is not found – and the spelling is definitely correct – look through the report to check for name changes, merger information etc.
- Company name changes can be verified by searching company details in the address field

- **If there is a company for your collection**, go into the holdings table to check if the report has already been received and checked in. If so, discard it (unless you keep duplicates)
- If the report has not been received, select the latest report received by clicking on the ‘edit’ button. The year of the report, format and location can be edited as necessary. (The year of the report should be entered as it appears on the report cover, even if it is split - e.g. 2006/2007)
- *Notes field*: enter any relevant comments (e.g. report is a print-out). The company URL can be added here if the user is being referred to an electronic version of an annual report. However, this is **not** recommended as there are several disadvantages connected with providing electronic archives of annual reports. Refer to part 1 section 8 of this toolkit for a discussion on how to best deal with this problem
- Click on the ‘save as new’ button



- **If there is no record for your collection in the collection table**, one will need to be created
- In the ‘add new’ column, click on the ‘collection’ button
- Add a start date and click on the ‘add’ button
- The ‘edit holdings’ screen now opens. Complete the relevant fields and click on ‘save as new’ when completed

- **If there is no record in the series table**, one will need to be created before adding collection and holdings information
- In the ‘add new’ column, click on the ‘series’ button
- Complete the relevant series information. Collection information can also be added at this point. Click on the ‘add’ button. The ‘edit holdings’ screen now opens where data can be entered if available

- At the end of the editing session, click on ‘perform updates’, with your collection selected, on the ‘SCoRe Administration Tools’ screen. This will update the latest received date of newly checked-in reports and update any alterations to the start dates of the individual holdings

Adding new companies to SCoRe

- Double check that the company is not already on the database
- If it is not there, click ‘add company’. This appears towards the top right corner of the screen after a search has been conducted on a company name
- **Data entry rules for company names:**
  Enter the correct registered company name, including or excluding punctuation as appropriate. The name should appear somewhere on the report (if in doubt, check the Companies House website). Terms of incorporation should be standardised without punctuation – e.g.

  A. G. BARR PLC

  AMCOR LTD

  A O SMITH CORP

  A. G. EDWARDS INC

  A COHEN & CO

- Complete the other fields as fully as possible, paying particular attention to the following:

  FT Sector
  Companies are classified according to the FT Sector to which they belong. Make appropriate selection from drop down list. A discussion of subject classification for annual reports can be found in part 1 section 10 of this toolkit

  Financial Year End
  Add the day and month only (e.g. 31/12)

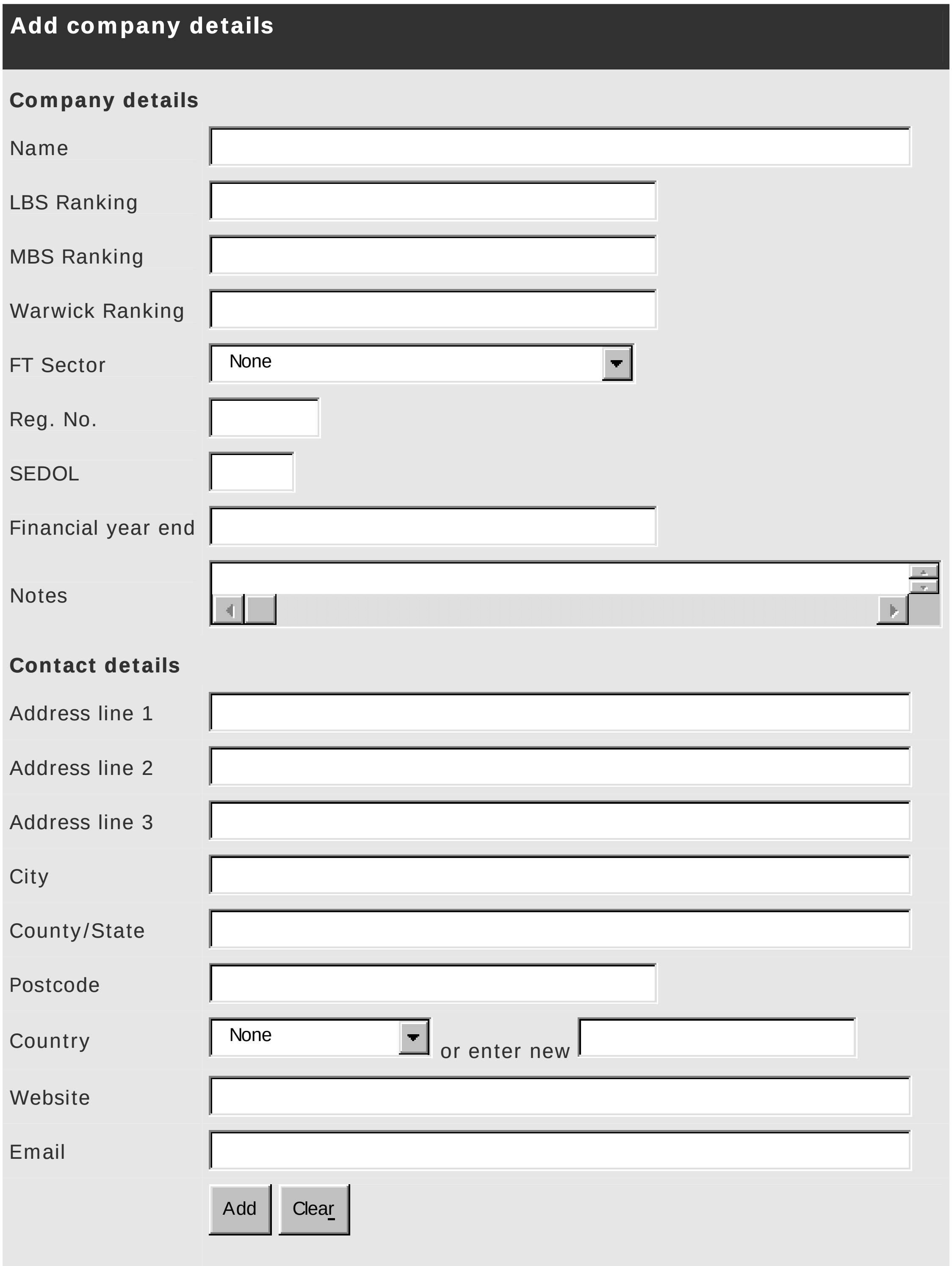
  Contact Details
  The address fields will need to be completed if an ‘export for mailing’ is to be performed. Therefore, as much information as is available should be entered, including the Website address.

- Click on the ‘add’ button
- Series, collection and document information can be added when the report arrives (see ‘Entering Annual Reports’ instructions above)

  Email addresses

- Where possible email addresses added to SCoRe should be general investor relation contacts (e.g. investor.relations@unilever.com) rather than addresses for individuals, as general contact emails are less prone to change.

Add Company Details – this screen needs to be completed as fully as possible for every new company entered on SCoRe



Add company details

Company details

Name

LBS Ranking

MBS Ranking

Warwick Ranking

FT Sector None

Reg. No.

SEDOL

Financial year end

Notes

Contact details

Address line 1

Address line 2

Address line 3

City

County/State

Postcode

Country None or enter new

Website

Email

Add Clear

Deleting records from SCoRe

- From the holdings table, mark the reports that are to be deleted by clicking in the relevant box
- Click ‘delete marked items’ in order to delete selected records
- If the entire collection is redundant, all records can be deleted along with the collection by clicking on ‘delete all and collection’
- **Do not forget to click on ‘perform updates’ after deleting reports**

Select holdings record to edit / delete

Del	Edit	Year	Format	Location	Received	Notes
☐	Edit	2007	Print	Basement current		
☐	Edit	2006	Print	Basement current		
☐	Edit	2005	Print	Basement current		
☐	Edit	2004	Print	Basement current		
☑	Edit	2003	Print	Basement current		
☑	Edit	2002	Stock Exchange fiche	Basement fiche cabinets		

Delete Marked Items

Delete this collection & all holdings records

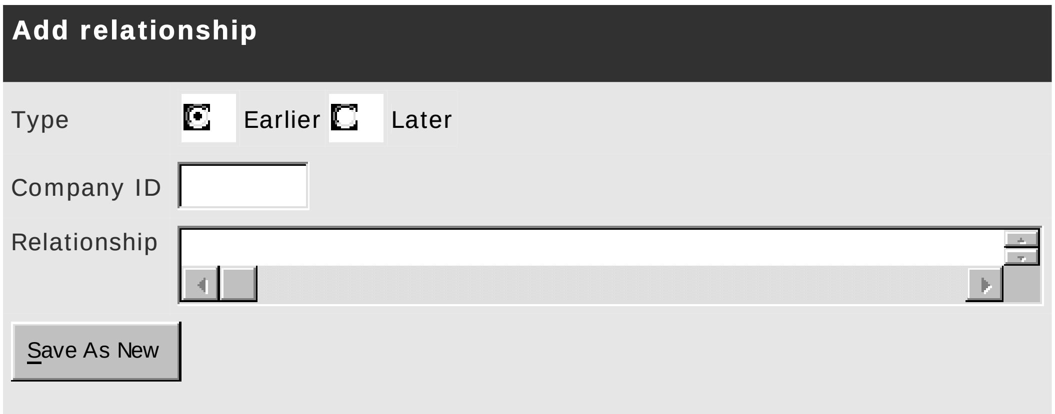
Delete All & Collection

Changes to company information

- If a company changes its name or status, a relationship needs to be created which acts as a standard description describing the circumstances surrounding the change
- Search for the companies within the relationship
- To find the SCoRe ID click on the correct company name to the left of the screen once the search results have been displayed and look at the company details on screen
- Note down the correct name and the SCoRe ID for all the companies
- Once all the information has been gathered, select one of the companies (if it's a **merger** then chose the final company formed. For **subsidiaries, name changes and acquisitions** use either company ID)
- Click the button called 'relationships' towards the top right of the 'editing company details' screen
- Firstly chose whether it is an earlier or later relationship you want to enter by clicking on the appropriate white circle beside the words
- Type the Company ID of the company you are creating a relationship with (NOT the ID of the company you are currently in – you don't want to create a relationship with itself)
- Then type the description of the actual relationship. You will need to mention all company names in full and use the standard descriptions for explaining the relationships

  The **standards** are as follows:
  ____________acquired____________
  ____________changed name to____________
  ____________and___________merged to form____________
  ____________demerged to form____________and____________
  ____________is a subsidiary of____________

- Check the spelling of the companies etc. is correct
- Click on 'save as new'



Export for mailing

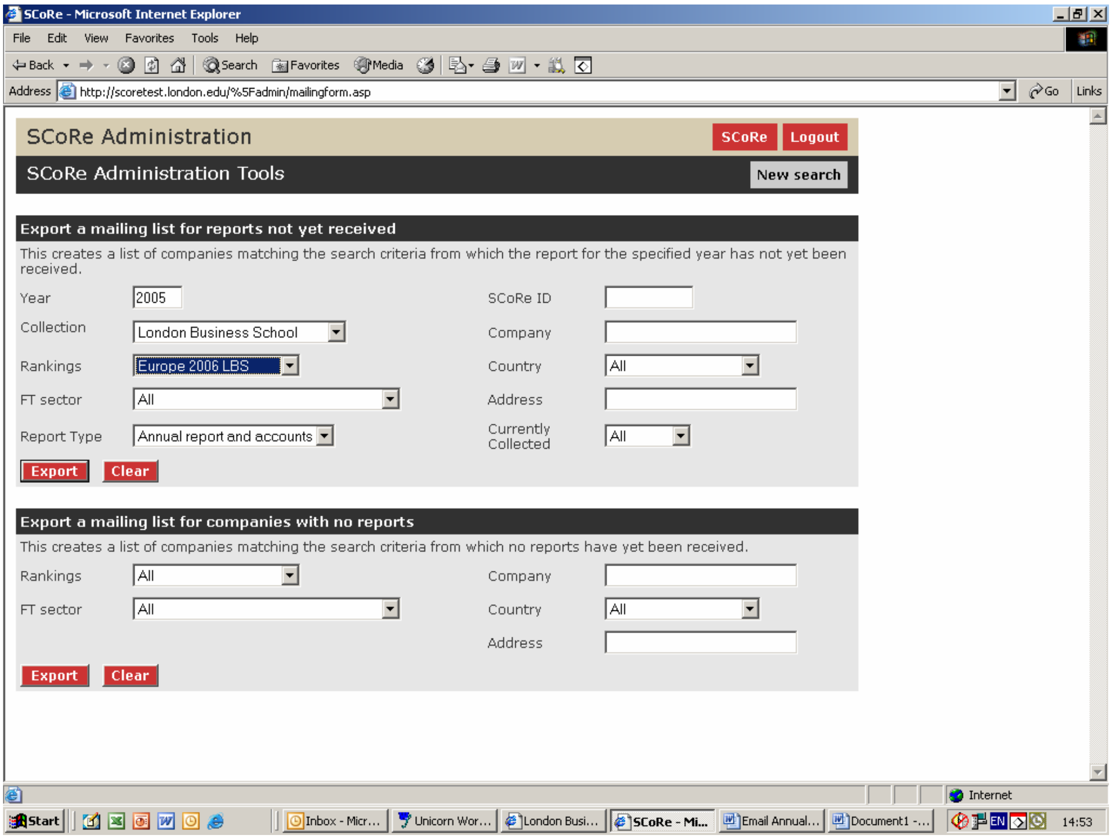
- This facility is designed to generate letters to be mailed to a large group of companies. This is achieved by generating an Excel spreadsheet containing the name and address of selected companies, from which a mail-merge can be performed. An emailing facility is also available for those companies with valid email addresses.

- Export for mailing is mainly used to generate letters or emails requesting annual reports from companies that are part of a particular ranking (e.g. UK 2006, Fortune 2006). Should you wish to use export for mailing for this purpose, it is advised that the rankings that are already present in SCoRe should be utilised rather than new rankings being produced for every collection. This is mainly to preserve space and to prevent the database from becoming too cluttered

- It is advised that the latest annual reports should be requested from companies once a year. Therefore, company contact details need to be kept up-to-date. Refer to part 1 section 7 of this toolkit for more general advice regarding the acquisition of annual reports

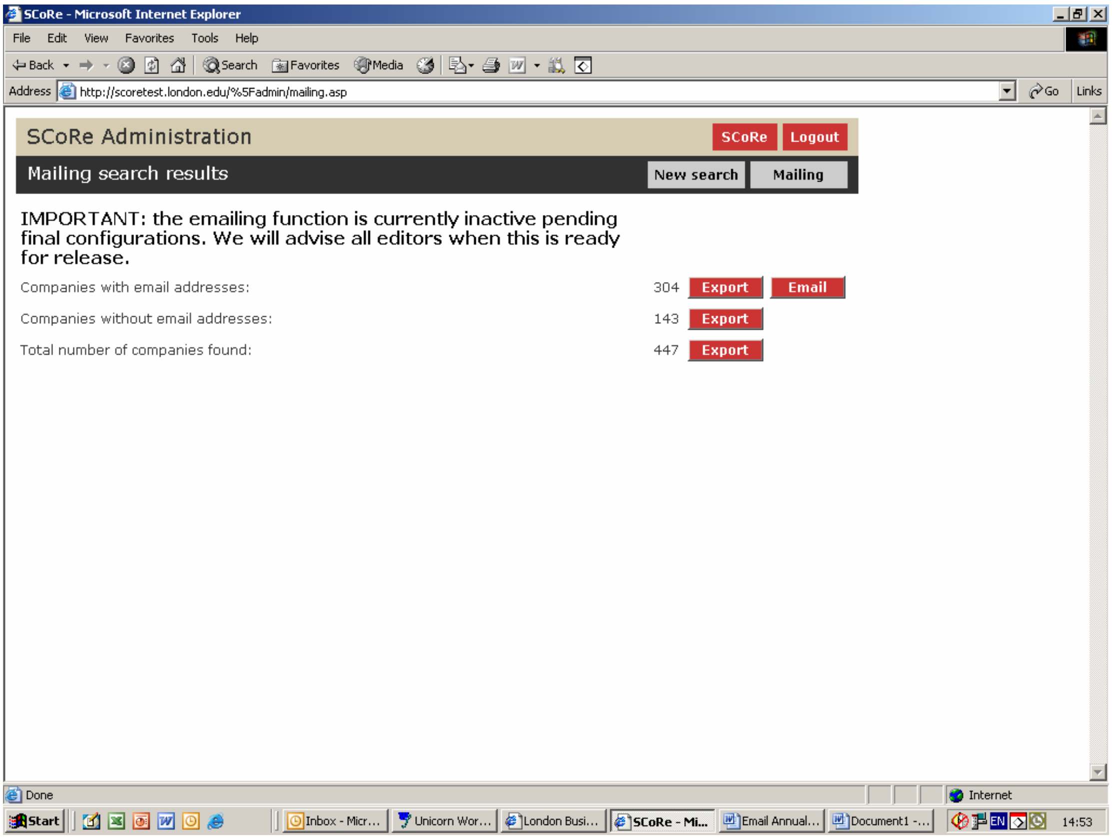
- On the main ‘SCoRe Administration Tools’ interface, select the “Mailing” facility, followed by the details of the companies that are to be exported (this will normally be from an updated ranking field).

  The mailing facility has two options – “Export a mailing list for reports not yet received” (i.e. there are existing holdings for company, but not the year required) and “Export a mailing list for companies with no reports” (i.e. there are no existing holdings for the company).

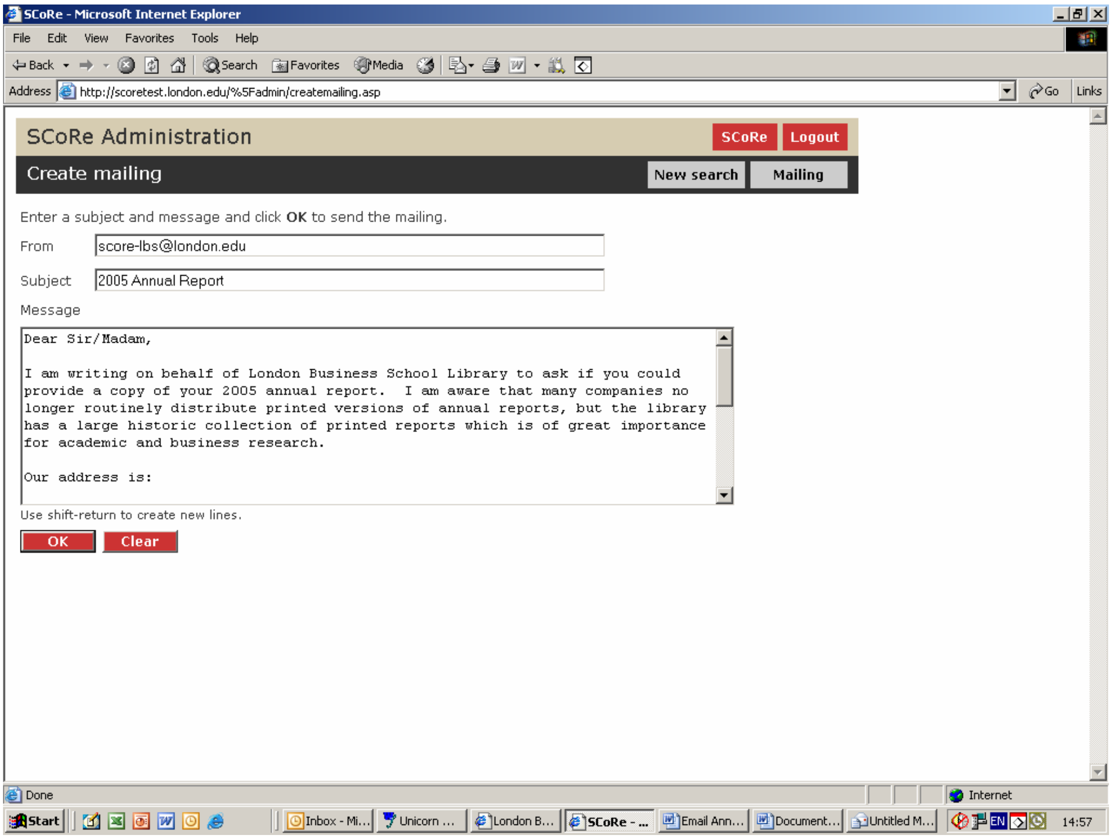


- If two collections have the same ranking field, then the collection **must** also be selected
- Click on the ‘Export’ button
- The resulting screen divides the companies selected between those with email addresses and those without. Any companies with invalid email addresses will also be displayed at this stage, so it may be necessary to return to the company records and edit/delete these.

The list of companies to be emailed can be viewed using the Export button or you can go straight to the Email function by clicking “Email”.



- Clicking “Export” opens a Microsoft Excel Workbook, containing the selected companies and their address information. The spreadsheet also includes the company’s FinancialYearEnd and the LatestReceivedDate of their annual report.
- A mail-merge can now be performed using the company address data in Excel and a form letter document in Word. An example of a form letter used to request annual reports can be found in part 1 section 13.3 of this toolkit
- Clicking “Email” takes you to the email mailing screen. The screen will automatically fill in the “From” field with the generic email address for the institution in the form score-nnn@london.edu, where “nnn” is the abbreviation for the institution e.g. LBS, CBL. Any email responses to this address will automatically be forwarded to the email address supplied by each institution.



Subject and Message fields can then filled in as desired.

N.B. The completion of the email mailshot facility invariably results in a number of automated replies e.g. out of office replies. If any emails are returned stating an invalid email address then it is recommended that SCoRe users amend the company records to ensure the accuracy of SCoRe records.

Appendix 1: Field-by-field guide

1.1 Entering annual reports that are present on SCoRe

- **Search for company name** in main ‘Admin Tools’ screen
- **Holdings table**
    - Check if report has been received
    - If yes, select latest report received (click on ‘edit’ button)
    - ***Year:*** enter the year of the report either in 4-digit format (2007) or as a split year (2006/2007)
    - ***Format:*** enter the format of the report (e.g. print)
    - ***Location:*** enter the location of the report
    - ***Notes:*** enter any relevant notes (e.g. report is a print-out)
    - Click on ‘save as new button’ when finished editing

1.2 Entering annual reports that are not present on SCoRe

- **Search for company name** in main ‘Admin Tools’ screen. Make sure the company is not on the database
- **Add new column**
    - Click on the collection button
    - ***Start date:*** add the start date of the report either in 4-digit format (2007) or as a split year (2006/2007)
    - The ‘edit holdings’ screen now opens
    - ***Year:*** enter the year of the report either in 4-digit format (2007) or as a split year (2006/2007)
    - ***Format:*** enter the format of the report (e.g. print)
    - ***Location:*** enter the location of the report
    - ***Notes:*** enter any relevant notes (e.g. report is a print-out)
    - Click on ‘save as new button’ when finished editing

- If there is no record in the series table
- **Add new column**
    - Click on the series button
    - ***Document type:*** select appropriate document type from the dropdown menu. This will auto-populate the series field
    - Complete the collection information
    - ***Collection:*** select appropriate collection from dropdown list
    - ***Start date:*** add the start date of the report either in 4-digit format (2007) or as a split year (2006/2007)
    - The ‘edit holdings’ screen now opens

  - ***Year:*** enter the year of the report either in 4-digit format (2007) or as a split year (2006/2007)
  - ***Format:*** enter the format of the report (e.g. print)
  - ***Location:*** enter the location of the report
  - ***Notes:*** enter any relevant notes (e.g. report is a print-out)
  - Click on 'save as new button' when finished editing
- **At the end of the editing session, click on perform updates on the main 'Admin Tools' screen**

1.3 Adding new companies

- If a company is not on the database, click 'add company'.
- **Add company**
  - ***Name:*** enter the name of the company, observing the rules concerning data entry
  - ***Ranking:*** enter a ranking if required
  - ***FT sector:*** select appropriate FT sector from the dropdown menu
  - ***Financial year end:*** enter the day and month only
  - ***Notes:*** enter any relevant information

  - ***Address line 1-3:*** enter first part of company address
  - ***City:*** enter the city of the company
  - ***County/State:*** enter county/state address details
  - ***Postcode:*** enter postcode of company
  - ***Country:*** select appropriate country for the company from the drop down list, or enter new if country is not listed
  - ***Website:*** enter the Website address of the company
  - ***Email:*** enter the email of the company if available
  - Click on the 'add' button

- Series, collection and document information can be added when the report arrives

1.4 Deleting records

- Individual holdings records can be deleted along with the collection if required
- **Holdings table**
  - ***Select holdings record to edit / delete:*** mark the reports that are to be deleted by clicking in the relevant box
  - ***Delete marked items:*** click on this button to delete selected records
  - ***Delete this collection & all holdings records:*** click on 'delete all & collection button' if the entire collection is no longer required

- **Do not forget to click on 'perform updates' on the main 'Admin Tools' screen after deleting reports**

1.5 Changes to company information

- **Edit company details**
    - Click on the button called 'relationships'
    - ***Type:*** chose whether it is an earlier or later relationship you want to enter by clicking on the appropriate circle beside the words
    - ***Company ID:*** enter the Company ID of the company you are creating a relationship with. The Company ID is found in the 'Edit company details' screen
    - ***Relationship:*** enter the description of the actual relationship, using the standard descriptions
    - Click on 'save as new'

1.6 Export for mailing

- **Admin Tools**
    - Select the companies that are to be exported, ensuring that the correct collection is highlighted
    - ***Export for mailing:*** click on this button
    - A Microsoft Excel Workbook will open, containing the selected companies and their address information
    - A mail-merge can now be performed

Appendix 2: Data entry standards

Company details screen

- ***Name:*** enter the name of the company, observing the following rules concerning data entry:

  Enter the correct registered company name, including or excluding punctuation as appropriate. The name should appear somewhere on the report (if in doubt, check the Companies House website). Terms of incorporation should be standardised without punctuation – e.g.

  A. G. BARR PLC
  AMCOR LTD
  A O SMITH CORP
  B. G. EDWARDS INC
  A COHEN & CO

- ***Ranking:*** enter a ranking if required. The ranking code should include part of the collection name as an identifier (UK 2006 LBS)
- ***FT sector:*** select appropriate FT sector from the dropdown menu
- ***Reg.* No.*:*** leave blank unless known
- ***SEDOL:*** leave blank unless known
- ***Financial year end:*** enter the day and month only (31/12)
- ***Notes:*** enter any relevant information. NB notes about mergers, name changes etc. should be made via ‘relationships’

- ***Address line 1-3:*** enter first part of company address
- ***City:*** enter the city of the company
- ***County/State:*** enter county/state address details
- ***Postcode:*** enter postcode of company
- ***Country:*** select appropriate country for the company from the drop down list, or enter new if country is not listed in lower case, capitalising the first letter. Double check that an alternative country name is not already in use – e.g. Netherlands for Holland
- ***Website:*** enter the Website address of the company (including http://)
- ***Email:*** enter the email of the company if available

Series screen

- ***Document type:*** select appropriate document type from the dropdown menu. This will auto-populate the series field

- ***Collection:*** select appropriate collection from dropdown list
- ***Start date:*** add the start date of the report either in 4-digit format (2007) or as a split year (2006/2007)
- ***End date:*** enter end date, if appropriate, in 4-digit format (2007)
- ***Mailing date:*** can be entered manually as follows (01/07/2006)

Collection screen

- ***Collection:*** select appropriate collection from dropdown list
- ***Start date:*** add the start date of the report either in 4-digit format (2007) or as a split year (2006/2007)
- ***End date:*** enter end date, if appropriate, in 4-digit format (2007)
- ***Mailing date:*** can be entered manually as follows (01/07/2006)

Holdings screen

- ***Year:*** enter the year of the report either in 4-digit format (2007) or as a split year (2006/2007)
- ***Format:*** select the format of the report (e.g. print) or enter new format
- ***Location:*** select the location of the report from dropdown menu or enter new location
- ***Notes:*** enter any relevant notes (e.g. report is a print-out). Restrict notes to 55 characters (including spaces) to ensure the note is displayed correctly and is readable in public SCoRe. Always check lengthy notes on public SCoRe to ensure they are displayed as intended