

# SDC PLATINUM ADD-ON

## USER GUIDE

This user guide introduces LSEG Workspace's add-on premium deals offering, SDC Platinum.

This service can be hosted via desktop or web. It 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.



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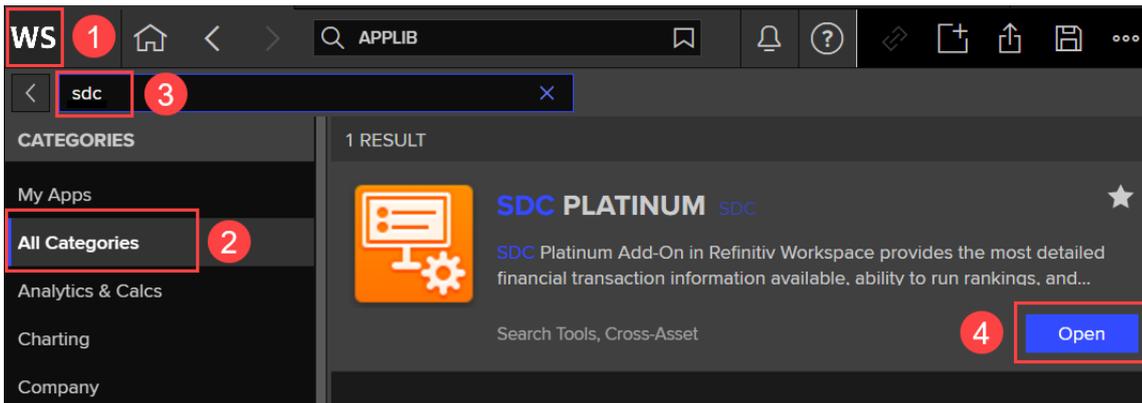
# Chapter 1 – Overview

## Accessing SDC Platinum

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

To open using the App Library

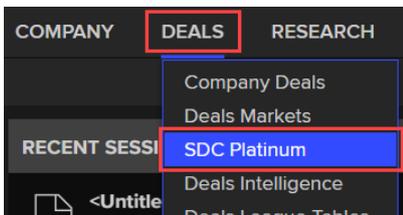
1. Click the **WS** icon in the top menu bar and select **App Library** from the list, or click **APPLIB** in the bookmark menu bar.
2. Select **All Categories** from the Categories menu.
3. Type the short code **SDC** in the APPLIB search bar. The SDC Platinum app displays.
4. Click the **Open** button.



To open using the Deals menu

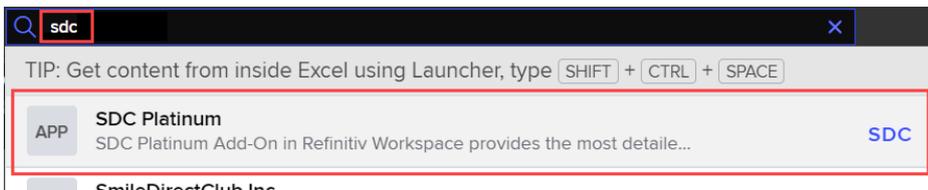
Clients with Banking Profiles set up will see **Deals** on the Workspace menu.

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



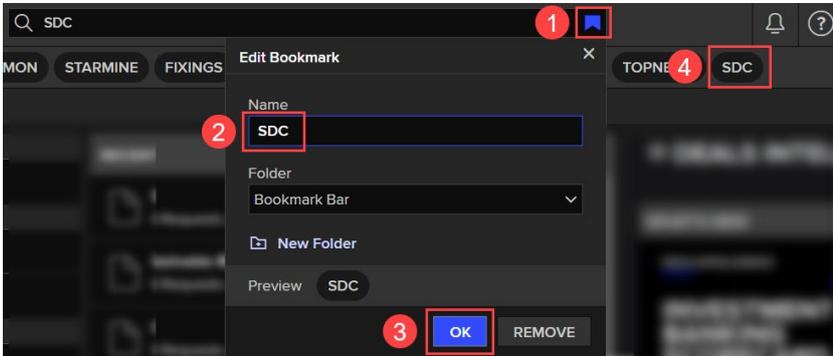
To open using the search bar

1. In the search bar, type the short code **SDC**.
2. Select **SDC Platinum** from the list to open the app.



## Bookmarking SDC Platinum

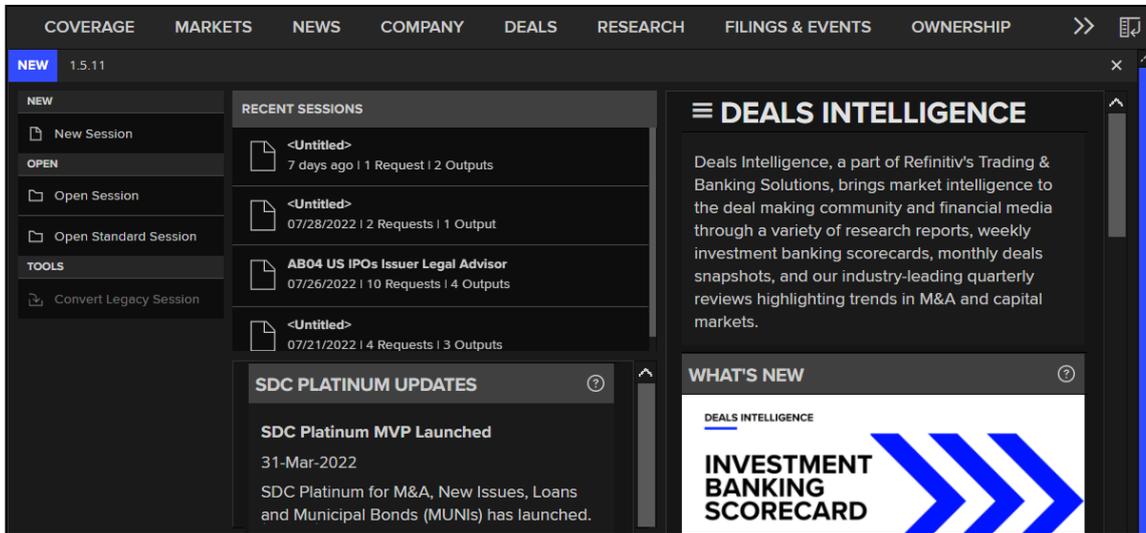
1. Select the **Bookmark** icon for SDC in the search bar.
2. Name the bookmark and click the **OK** button. The SDC bookmark displays in the bookmark menu.



## Chapter 2 – Getting started

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

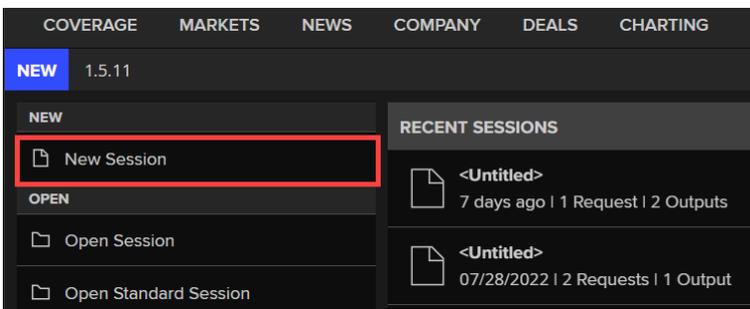
The appearance of the landing page can be charcoal or white, depending on your Workspace color and theme settings.



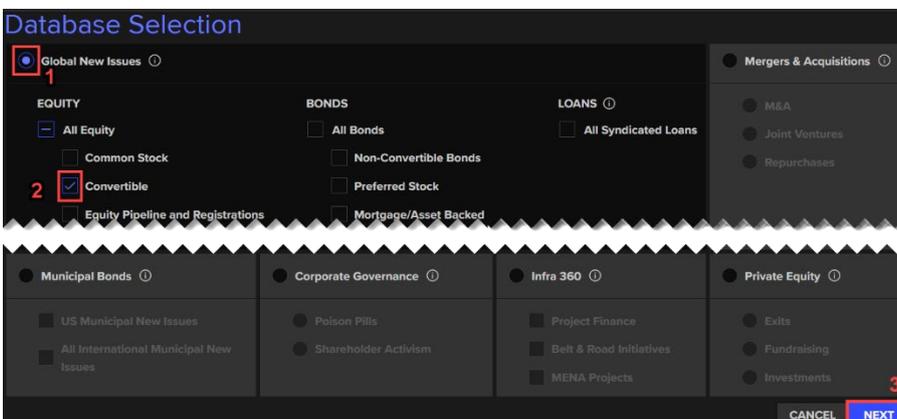
### Creating a new session

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

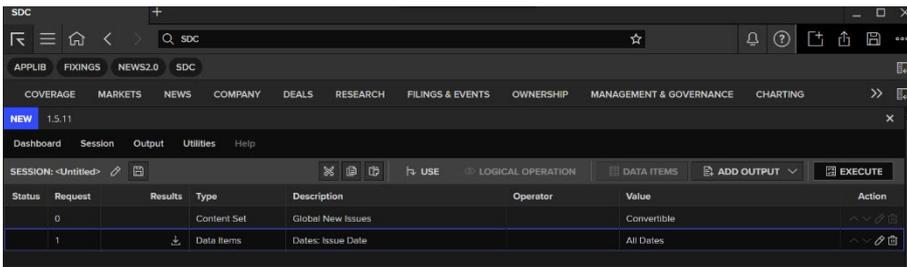
1. Click **New Session**. The Database Selection screen displays, showing all the data available to query. If you don't have permission for a dataset, it will be disabled.



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.

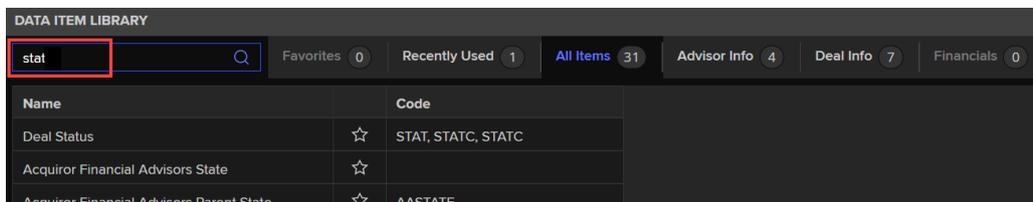
You can search for data items using:

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

To build a search by text or keyword

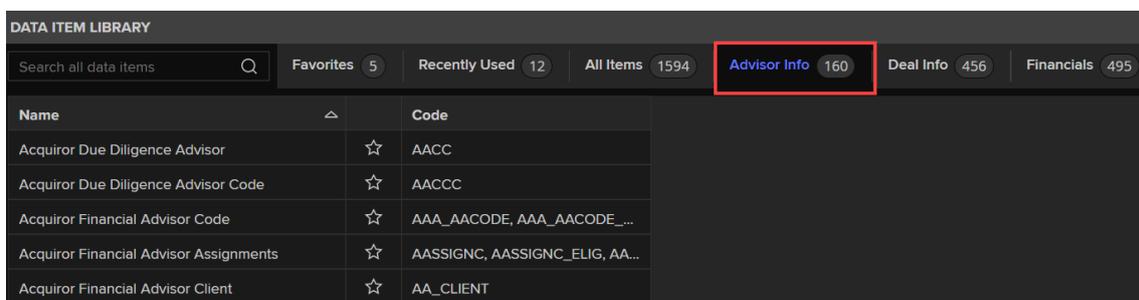
Type a partial phrase or word in the data items library Search field. This can be the name of the data item, or an alias – a keyword that is associated with the data item. The longer or more complete the entry is, the more exact the auto-suggest search results are.

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



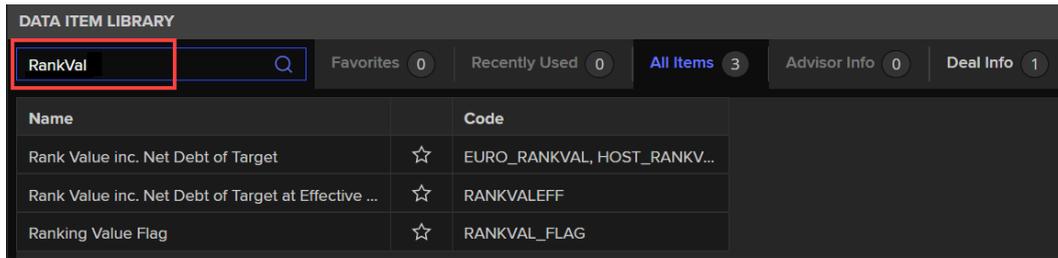
To build a search by filter

- 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:



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**:

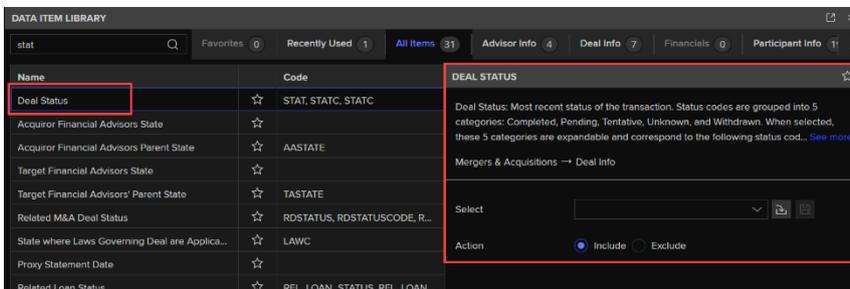


- Type the whole heritage SDC code in the data items library Search field to get an exact match. The search will not return heritage code results for a partial match.

## 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.



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

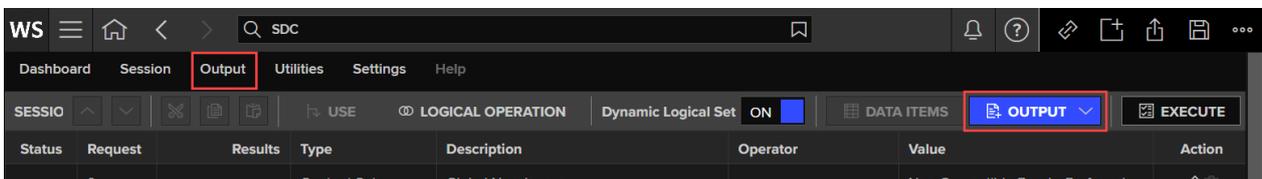
## Creating an output (multiple outputs)

There are three output types:

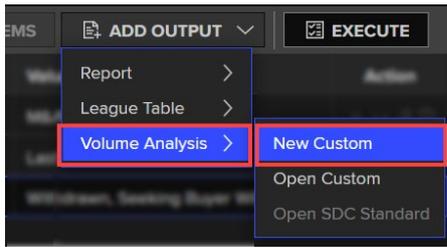
- **Reports:** To create deal lists
- **League Tables:** To apply an LSEG Standard League Table ranking or create a custom ranking
- **Volume Analysis:** To apply an LSEG output or create a custom volume analysis

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 LSEG



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 🗑
✓	1	1380244 ↓	Data Items	Date Announced		All Dates	^ v 🗑
✓	2	19853 ↓	Data Items	Deal Value (Curr=USD, Scale=6, Include...	Greater Than Or Equal	900.00	^ v 🗑
✓	3	14218 ↓	Data Items	Deal Status	Include	Completed	^ v 🗑
	4	↓	Output	League Table: <Untitled>			^ v 🗑

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

## Chapter 3 – Helpful utilities

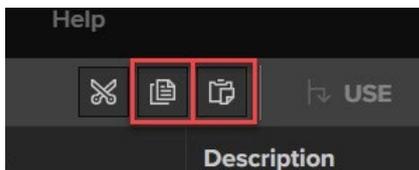
### Copying and pasting requests

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.

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

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



- The copied row displays below the original.

SESSION: Session01 [edit] [save] [copy] [paste] [USE] [LOGICAL OPERATION]

Status	Request	Results	Type	Description	Opera
	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.

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

Dashboard Session Output Utilities Help

SESSION: M&A-Session01 [edit] [save]

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...

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

Save Session? [close]

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

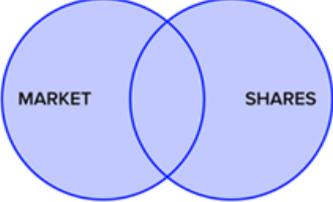
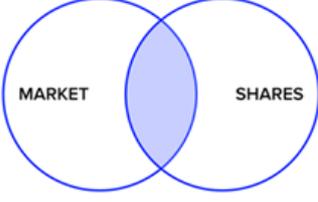
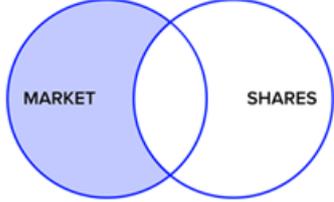
The Use functionality allows you to reference the universe of deals up to that requested data item. It enables you to return to the data item, or search request, and start filtering the universe from it.

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

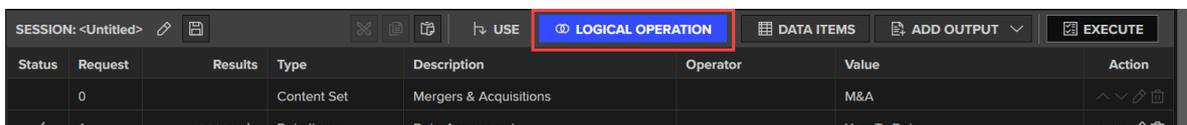
The logical operations in SDC Platinum use Boolean logic. There are three available operations:

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

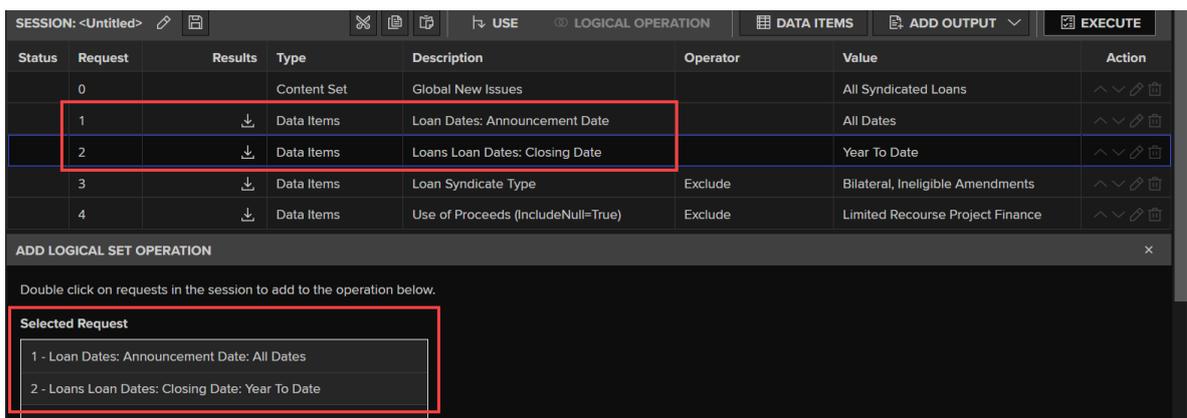
#### Adding logical operations to use requests

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)

The Logical Operation request is added to the Session View.

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

## Chapter 4 – Further help and support

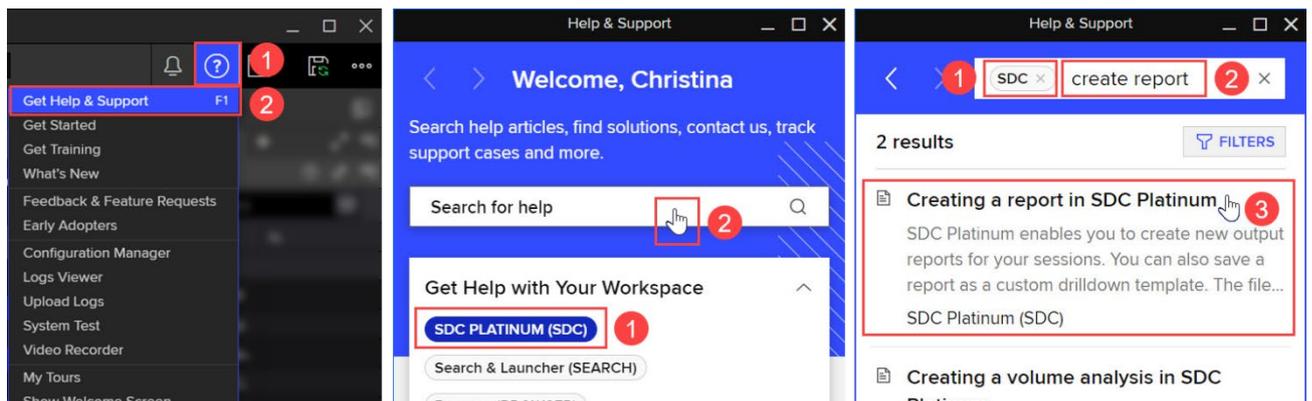
### Accessing in-product help

LSEG 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. If you have the SDC Platinum Add-on open when you open the help, an SDC filter pill displays on the first page. Click this to select the filter.
4. Click in the **Search for help** field. The Discover Help Topics screen displays and the filter displays as a pill in the search field. Articles filtered for SDC display in the results list.

**Note:** If you didn't select the front-page filter pill, type **SDC** in the search field and press **Tab**. This also creates the SDC filter.

5. Type keywords in the search field for the help you want, and press **Enter**. The results list displays all relevant SDC articles.
6. Click an article to open it.



### Support

You can contact us directly through the Help & Support app via the **Contact Us** section. And to access learning content on the training site, go to [training.lseg.com/workspace-training/](https://training.lseg.com/workspace-training/).