Capital IQ Pro Academy

Certification Program

Students Guide

spglobal.com/marketintelligence/en/campaigns/
capital-iq-pro-academy

Summary

1. Student Sign Up

The S&P Capital IQ platform can be reached after one-time registration by WU employees and WU students using their WU email address (wu.ac.at for employees and s.wu.ac.at for students). If you are not yet registered for "Capital IQ Pro" you can do so via the official "Capital IQ Pro Academy" website.

https://www.spglobal.com/marketintelligence/en/campaigns/capital-iq-pro-academy
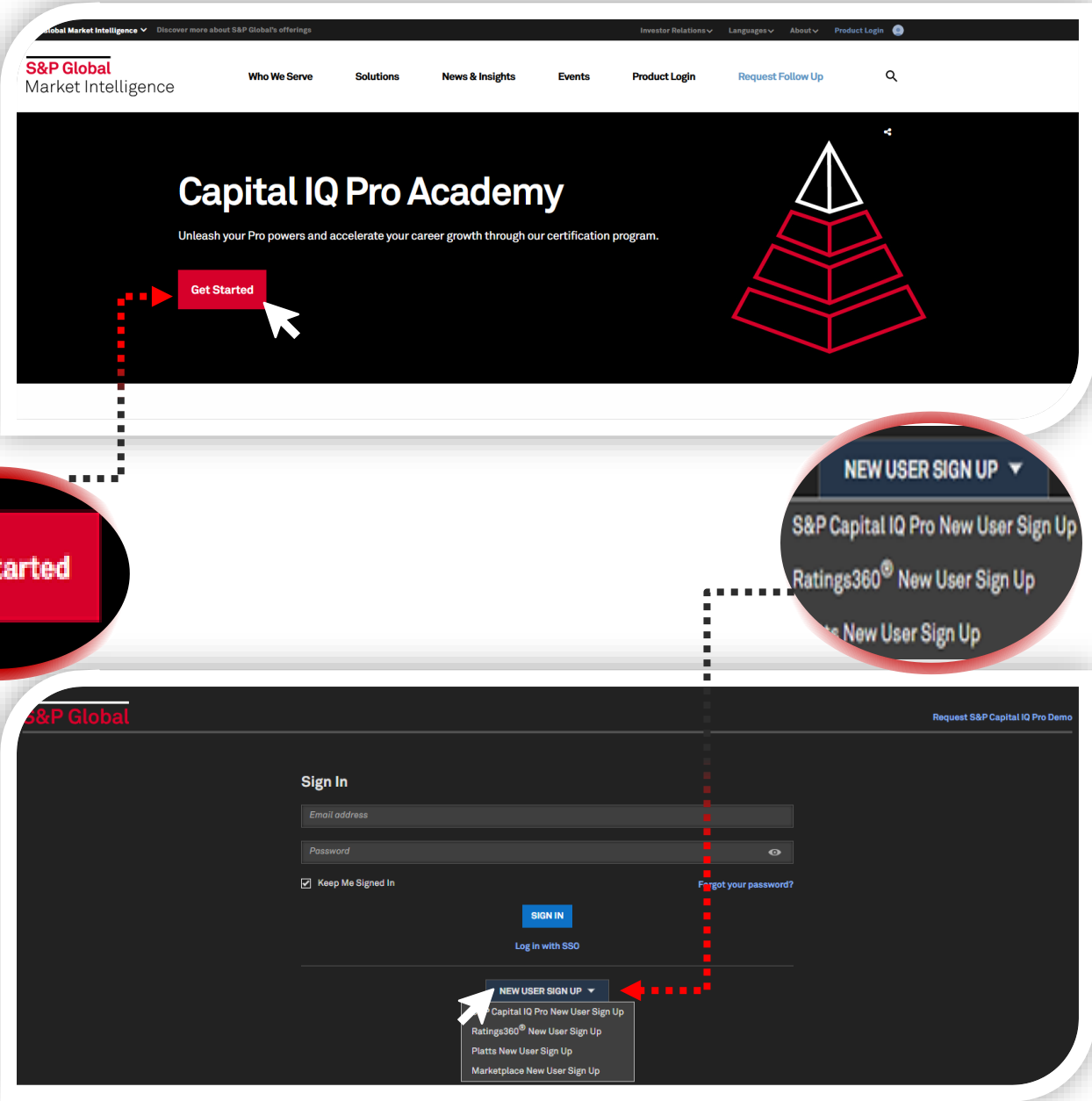
To sign in as a new user you need to choose "S&P Capital IQ Pro New User Sign Up". **Do not forget** that you can sign in **only using your WU staff or student email.** The system will check whether your organization has access to the Capital IQ System.

You need to provide your **account details (mandatory)** and the first account settings (optional). You may add account settings to personalize the first dashboard and terminal shortcuts.
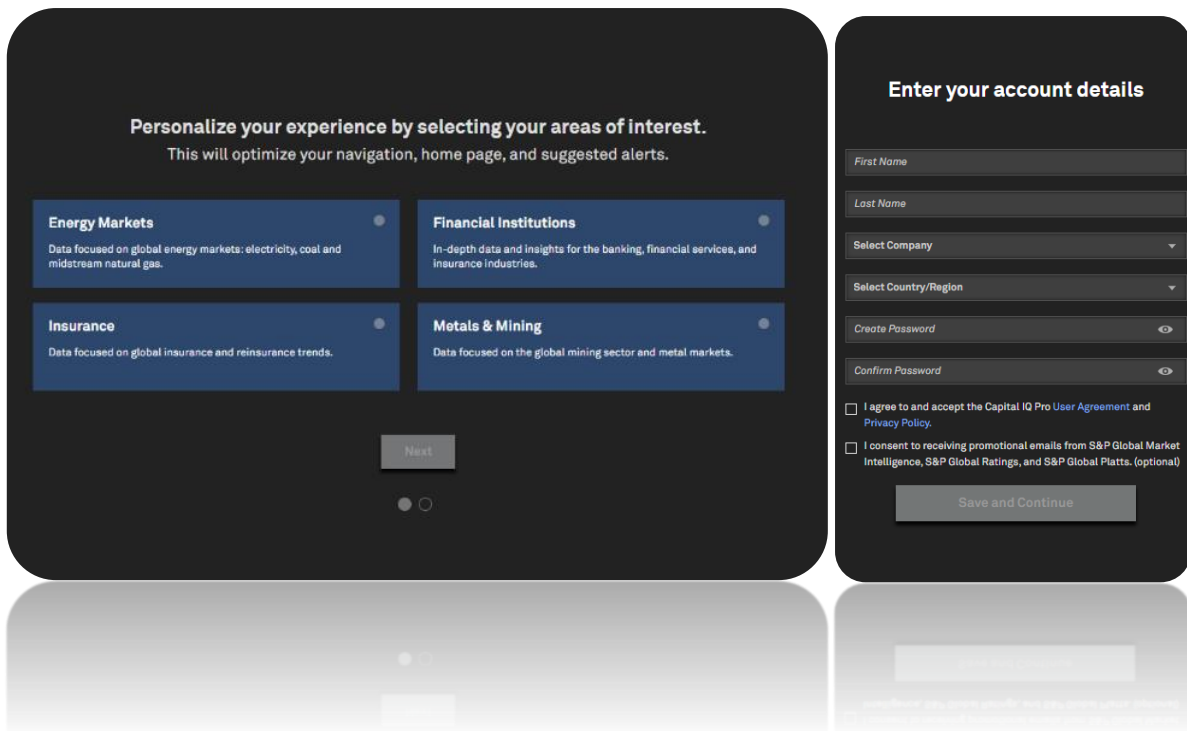
As the last step you need to fill in all the required fields for the user profile. **All of them are mandatory**. As your business phone you might indicate your **personal mobile phone number.**
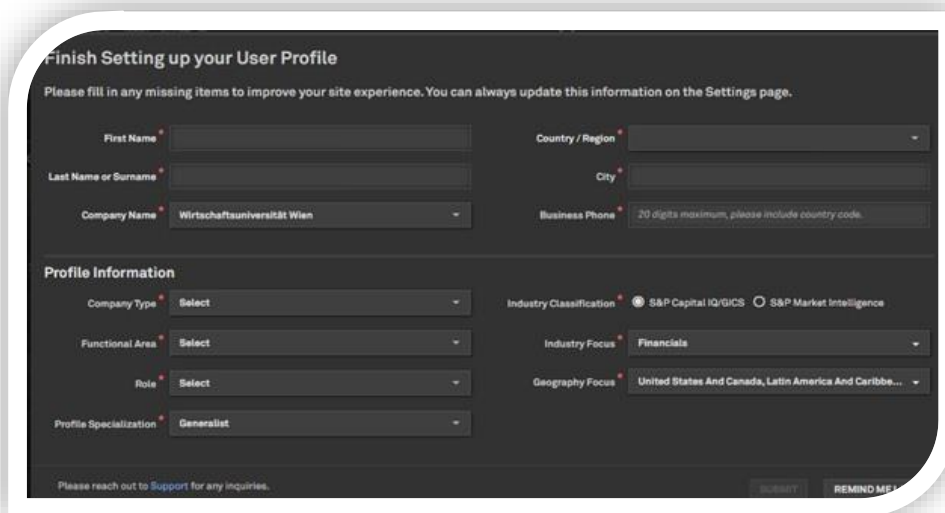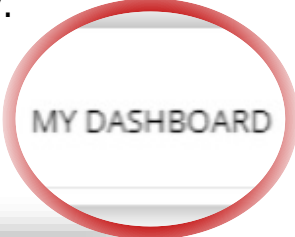

Afterward, the first automatically created dashboard will open. To access the "Capital IQ Pro Academy", click on the support button and select "Capital IQ Pro Academy" in the bottom right corner of the page.
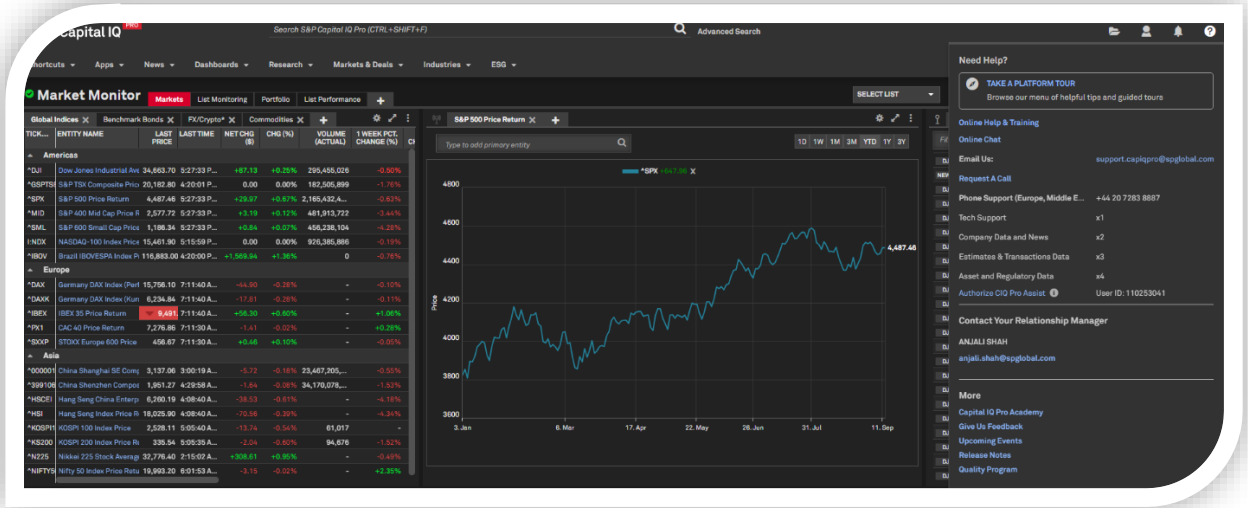
If you are already registered or have signed in for the first time, you can access the academy website using this link.

https://spglobal.thoughtindustries.com/
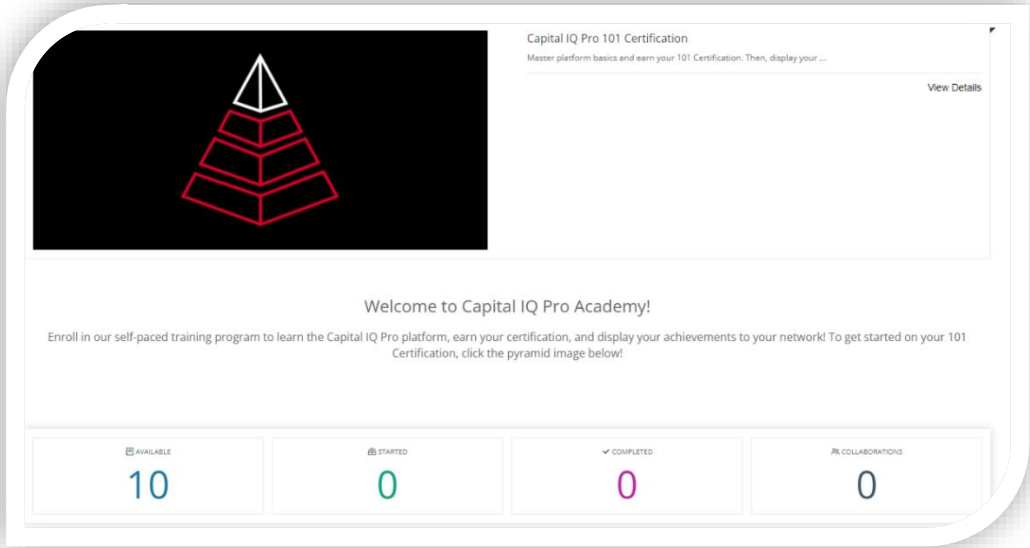
After entering the Academy website, you either need to proceed to the 'My Dashboard' page or you will be transferred to it automatically.

Capital IQ Pro Academy

Welcome to Capital IQ Pro Academy, the premier certification program for the Capital IQ Pro platform. Learn how to best use Capital IQ Pro for your workflows and receive badges upon completing each course.

2. Course Structure

After entering your dashboard, you can see all the available activities.

There are two options for completing the course: either by following the suggested **"Learning Path"** or in the desired order, one lesson at a time. We **strongly recommend** following the "Learning Path" because some lessons build upon material from previous sections. You can find the "Learning Path" under the "Activity" section on the "My Dashboard" page.
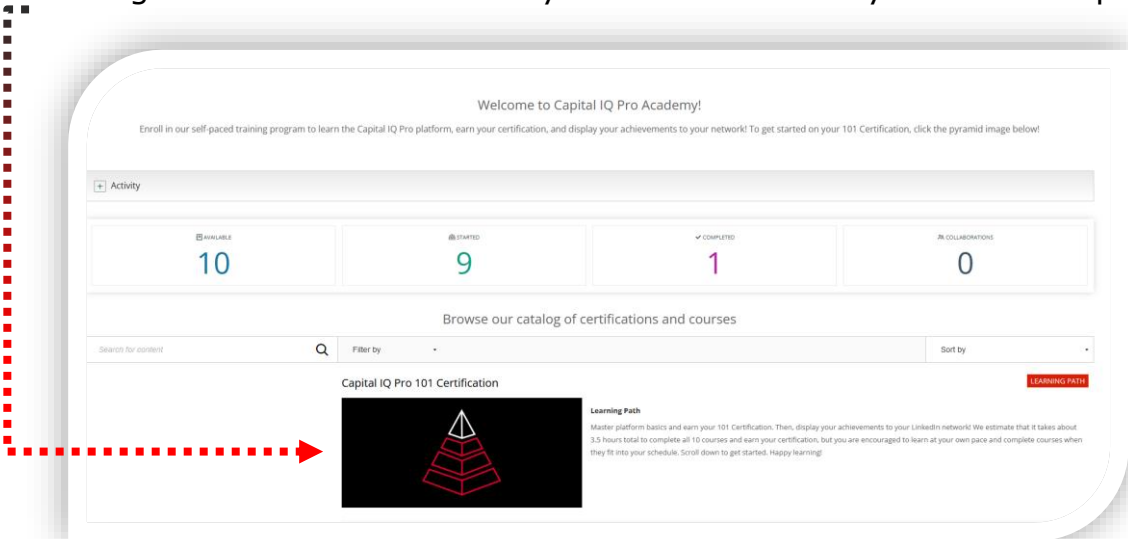
To complete all accessible courses, you need to have the **terminal** open in a separate tab or window. This is because all tests include steps to follow and exercises to emulate. To earn a course certification, you must successfully **complete at least 9** required courses. At the end of each module, there is a **test** in which you are allowed to make **no more than 1 mistake**. You can **retake** all tests immediately and an **unlimited number of times.**

The learning path (the first option on the website) consists of **4 subject headings** divided further **in 10 separated parts**:

- **Market Monitoring** | *55 minutes*
  You will learn how to customize your Capital IQ Pro platform experience, create relevant alerts, and personalize your dashboard to monitor the markets you care about whenever and wherever you are.
  - o **Platform Settings & Customization 101** | *30 mins*
    2 videos and 2 tests (2 and 4 questions respectively)
    You can personalize your Capital IQ Pro platform experience in a variety of ways and set up alerts and lists that are relevant for your workflows. *Comments:* Less useful course, as you probably do not need to create alerts for the academic tasks.
  - o **Dashboard 101** | *20 mins*
    1 video, flipcards, 1 test (6 questions)
    Dashboards are a streamlined way to monitor the companies and markets you follow. The Dashboard includes customizable widgets that stream real time data alongside news and fundamental data. *Comments:* all the dashboards are attached to the corresponding profile, so it is a good option to spend some time to customize your working space.
  - o **News 101** | *15 mins*
    1 video, 1 test (4 questions)
    News 101 app helps to stay informed and enables you to better understand the reasons of the market movements. This part of the course relates to the alerts setting and it provides possibilities for the sentiment analysis. *Comments:* the bigger part of the video is devoted to the sentiment analysis, Capital IQ Pro has many reliable news sources.

- **Company Information** | *55 minutes*
  You will learn how to dig deep into our data using corporate profiles and Document Viewer, then build reports from this data using Report Builder.
  - o **Company Research 101** | *25 mins*
    1 video, flipcards, 1 test (4 questions)
    Corporate Profiles are your go-to source for historical and forward-looking financial data, news, investment research, ownership data, transactions, ESG indicators, and more on the public and private companies we cover. This part provides basic understanding of corporate profiles on the Capital IQ platform. *Comments*: this part includes all the shortcuts for Capital UQ Pro.
  - o **Document Viewer 101** | *15 mins*
    1 video, 1 test (3 questions)
    AI-powered Document Viewer enables efficient discovery, analysis, and information extraction from text-based content on the Capital IQ Pro platform. All the reports are gathered at one place that is accessible with the effective search tools. It deepens your knowledge about sentiment analysis and different types of reports documents. *Comments:* Capital IQ Pro gathers all the financial statements and combine them with the search tools inside the terminal.

- o **Report Builder 101** | *15 mins*
  1 video, 2 tests (3 and 1 question respectively)
  With Report Builder, you can quickly assemble customized company or asset reports, then save, share, and export your report. Nice tool of combining many reports with the same characteristics to one file. The design of the automated reports is at a high-level. *Comments:* this is a powerful automated tool that enables you to download a specific part of the financial report or bring many parts from different reports together.

- **Office & Screening** | *50 minutes*
  You will learn how to use Screener and Capital IQ Pro Office to search for companies and detailed transactions, build custom models, and aggregate financial data.
  - o **Screener 101** | *20 mins*
    1 video, flipcards, 2 tests (3 questions each)
    Screener enables you to zero in on the data you need using a combination of company data, fundamentals, transactions, and key developments. After this module you learn how to create list of the required companies with necessary statistical indicators.
  - o **CapIQ Pro Office 101** | *30 mins*
    1 video, flipcards, 2 tests (2 questions each)
    Seamlessly power your proprietary models and streamline presentations with our easy-to-use Excel Add-In and suite of Office Tools. For this module your computer needs pre-installed Capital IQ Pro Excel Add-on. *Comments:* this tool is still being developed and is not represented on the WU computers, but you are still able to use Capital IQ Excel Add-on.

- **Data Visualization** | 30 *minutes*
  You'll learn how to create impressive presentations in a fraction of the time, using Mapping and Chart Builder.
  - o **Chart Builder 101** | *15 mins*
    1 video, flipcards, 1 test (3 questions)
    Using the Chart Builder, you have access to a flexible, intuitive charting tool for customizable analysis of company and market performance over time. This is a powerful tool that enables you to create the required chart within the terminal and download them as a finished graph.
  - o **Mapping 101** | *15 mins*
    1 video, 1 test (3 questions)
    The mapping tool lets you quickly create presentation ready maps or visualize spatial relationships to uncover new insights not found using traditional analysis. A powerful tool that does not have many alternatives and enables you to create finished mappings. *Comments:* a unique instrument from Capital IQ Pro which is necessary to use, if you are doing a work about companies in the USA or Europe.

3. Downloading your certificate

After completing **at least 9** of the required courses you will have the option to **download** your learning certificate. Additionally, all badges for each of the courses are always sent to your email. Thus, you can have certificates as for each course individually, as well as for completing the entire learning path.

You can always download the certificate from the "Activity" tab at the "Dashboard" page.
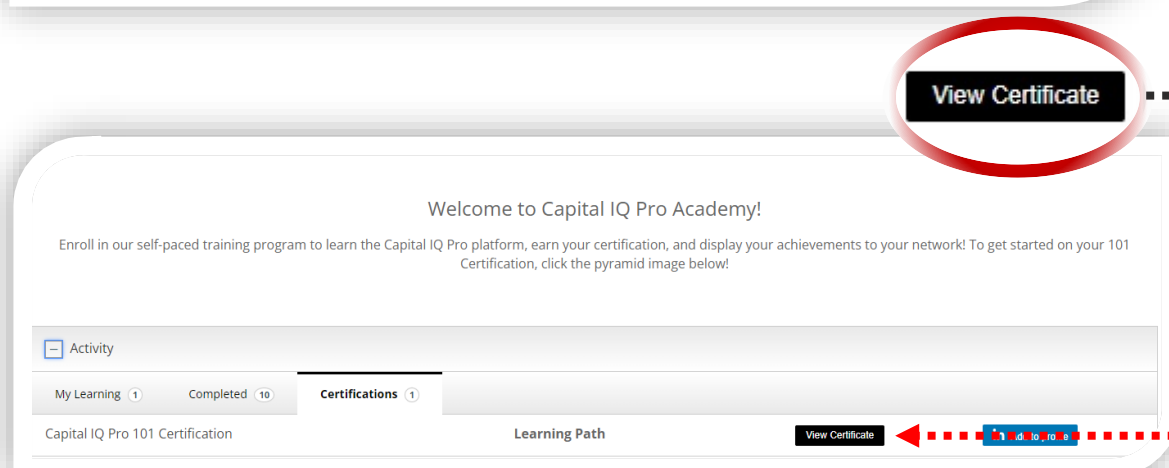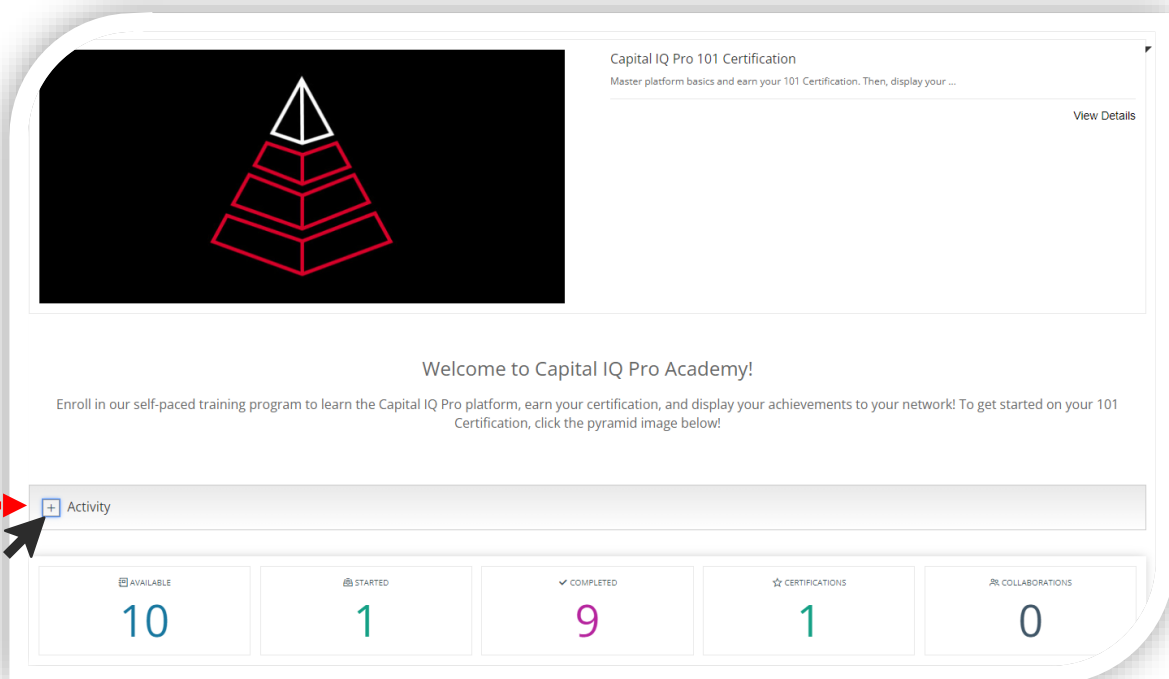
4. Student FAQ

What happens if I do not pass one of the tests?

If you fail one of the tests (by making more than one mistake), the system allows you to review all the questions, but it still does not show you the correct answers for the questions you answered incorrectly. However, it does indicate which questions you got wrong.

You can view the results for all the passed tests separately, but the system does not calculate the average or provide a percentage for the entire course. This does not affect the final certificate grade. The number of test retakes is unlimited, and there are no time constraints for any questions, so please be attentive and careful.
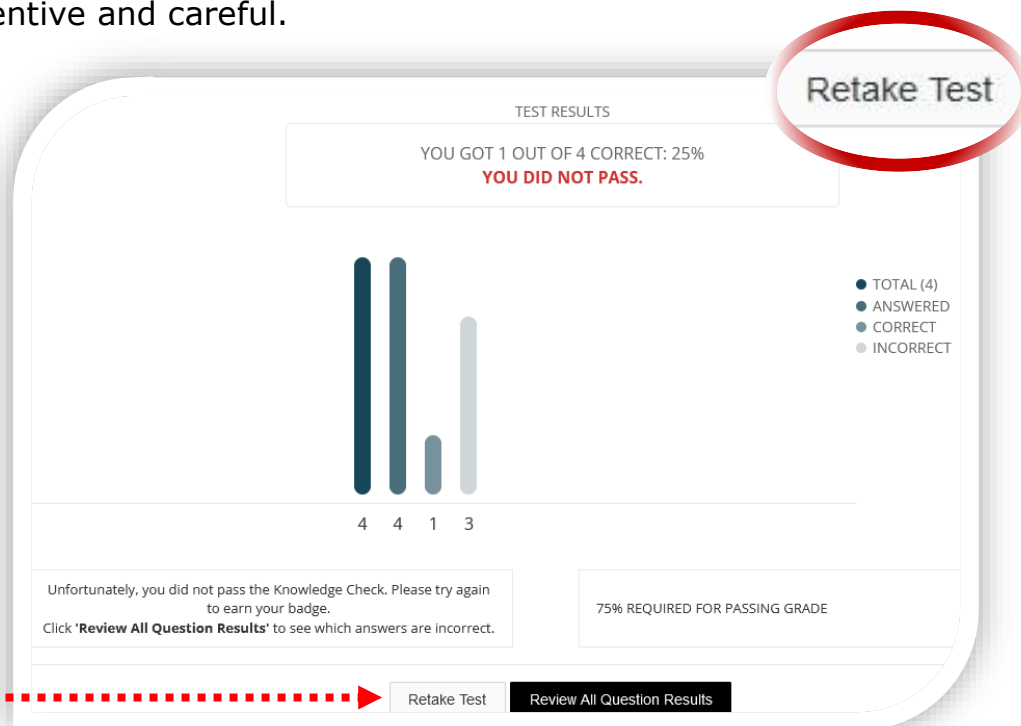
Why is the quality of the videos bad?

The system does not save any preferences you have set for previous videos. Therefore, you need to choose your preferred video speed and quality for each new video using the settings button at the bottom of the page.

What information is the most important for the tests?

To pass all the tests successfully, you need to watch all the videos carefully and repeat all the actions. Flipcharts are provided to deepen your knowledge or cover the functions that were not discussed during the video tutorials.

Don't forget that for some tasks, you will need to clear all previous filters, and for some larger exercises, you may need to prepare before attempting the question. Detailed descriptions with clearly defined steps are usually provided for each test question.

If you have any other questions, you can access the 'Take a Platform Tour' section from the 'Help' tab in your terminal.