



### Using the Financial Company Search

- 1. Log-in to I-SITE** (Select the *Financial Company Search* as the login category)
- 2. Type in the known criteria**  
(Detailed instructions for inputting criteria are available by selecting the blue links for the categories)
- 3. You MUST select a Statement Type**  
(In order to view multiple companies, a statement type must be selected.)
- 4. Select the Financial Reports Link**  
Either Financial Report link next to the completed Company code or Company name.
- 5. Saving Criteria** – You may elect to save your criteria for future searches.

The screenshot shows the 'Financial Company Search' web page. At the top, there are navigation links: Market Firm Search, Market Individual Search, Securities Search, Subsidiaries Search, Summary Reports, Utilities, Change Password, PICS, StateNet, ECRMA, Help, and E-Mail Login. Below these is a search form with various fields: Year (set to 2001), NAIC Company Code, Company Name, Group Code, Company Status, Statement Type, Business Type, Company Type, State, Filing Type, Filing Year, Analyst Team Level, and Nationality Significant. There are also buttons for 'Save Criteria', 'Delete', 'Use as Default', 'Financial Reports', and 'Clear'. At the bottom, it says 'Last Updated: 05/06/2002 09:38:25' and 'Copyright © 1998 - 2002 National Association of Insurance Commissioners. All rights reserved.'

**Banner Frame**

**Financial Reports**  
[Selected Reports](#) | [Preferences](#) | [View](#) | [Download](#) | [Print](#) | [Company Search](#) | [I-Site Help](#)

**Entity/Cocode Frame**

[Add/Remove](#)
[Company Info](#)

Data Year: 2001

17710 Alabama Munici
41661 Alfa General I
22330 Alfa Ins Corp
19143 Alfa Mut Fire

Sort:  Name  Cocode

#?

**Categories Frame**

<a href="#">Pick A Page [0]</a>	<a href="#">Scoring [0]</a>
<a href="#">Exam Jumpstart [0]</a>	<a href="#">Profiles [0]</a>
<a href="#">Loss Reserves [0]</a>	<a href="#">FAH [0]</a>
<a href="#">Analyst Team [0]</a>	<a href="#">IRIS [0]</a>
<a href="#">Compliance</a>	<a href="#">Line Report</a>

[Summary](#) [Other Reports](#) [Other Links](#)

**Activities Frame**

**Other Links**

[Financial Company Search](#)  
[Market Firm Search](#)  
[Market Individual Search](#)  
[Securities Search](#)  
[Subsidiaries Search](#)  
  
[Personalized Information Capture System \(PICS\)](#)  
[StateNet](#)  
[Utilities](#)  
  
[E-Mail](#)

**Banner Frame** - contains action buttons designed to initiate your request.

**Entity/Cocode Frame** - displays a list of all companies returned from the criteria selected on the Financial Company Search page.

**Categories Frame** - displays a list of general report categories.

**Activity Frame** - displays the user's report options, selections and other general information.

**Navigating within the Financial Search Page (To View, Print or Download)**

- 1. Select the companies from the Entity/Cocode**  
(To select more than one use the Ctrl + Click or to select a range use Shift + Click from your keyboard)
- 2. Select the type of report from the Categories Frame**  
(Select the checkbox next to the desired report or reports)
- 3. Save the selected reports**  
(Once all of the reports in a category have been selected click on the Save Selected Reports Button)
- 4. Continue Selecting the desired reports from the Categories Frame**  
(Repeating steps 2 and 3 until all of the desired reports have been selected)
- 5. Select the appropriate link (View, Download or Print) from the banner frame.**

**To View Selected Reports**

- 1. Select the View link from the Banner Frame**  
(This will allow you to view all of the reports selected in the categories frame, for all of the companies selected in the Entity/CoCode Frame)
- 2. A separate window will open for each report selected for all companies selected.**  
(System resources on your computer, may limit the number of reports that may be viewed at one time. See Tips and Tricks.)

**To Download Selected Reports (WinZip Required)**

- 1. Select the Download link from the Banner Frame**  
(This will allow you to download all of the reports selected in the categories frame, for all of the companies selected in the Entity/CoCode Frame into one compressed WinZip file.)
- 2. Verify that you are using the Save this file to disk or Save file as option and click the OK button on the file download window.**
- 3. Select appropriate file path, location and file Name and click the Save button on the Save As Window.**
- 4. Select the Close Button on the Download Complete Window once the process has been completed.**
- 5. Find the zipped file on your computer**
- 6. Open the file with your Unzip program.**

**To Print Selected Reports**

- 1. Select the Print link from the Banner Frame**  
(This will allow you to print all of the reports selected in the categories frame, for all of the companies selected in the Entity/Cocode Frame)
- 2. Click the "Print all" button on the Activities Frame**
- 3. Select the checkbox next to Print All Linked Documents on the print dialog box**
- 4. Click the OK button**

**Tips and Tricks for the Financial Reports Page**

- A Statement Type must be selected on the Financial Company Search to get to the Financial Reports Page, unless searching by a single Company Code or FEIN.
- Changing the year from within the Financial Reports Page may change the amount of companies retrieved. A companies statement type could change from one year to the next.
- Select the I-SITE Downloads page to access links to Unzip application

<b>Banner Frame</b>	
<b>Select Reports</b>	Displays the selected reports, by category that the user has selected during the current session in the activities frame.
<b>Preferences</b>	Displays a window in the activities frame that allows users to select previously saved profiles of reports or lists of companies.
<b>View</b>	Allows users to display all the selected reports for all of the selected companies in separate windows.
<b>Downloads</b>	Initiates an action that will allow users to convert selected reports data for the selected companies into an HTML, CSV or TAB compressed WinZip file format. The compressed (zipped) file will be downloaded to the user workstation.
<b>Print</b>	Starts the action that will send a hardcopy printout of each report selected for all companies selected to the user workstation. (NOTE: This feature is only available with the Internet Explorer browser.)
<b>Company Search</b>	Links the user back to the Financial Company Search page.
<b>I-SITE Help</b>	Links the user to the I-SITE Help Pages.
<b>Company/Entity Frame</b>	
<b>Add/Remove</b>	Allows users to add or delete CoCodes/Entities to the list of selected companies. (Only Entities of the same statement type will be present in the list of companies.)
<b>Company Info</b>	Displays a list of companies retrieved from the Financial Company Search that includes the Company CoCode, Name, Entity Number, Group Code, FEIN and Domicile. The company demographic information is available by clicking on the CoCode link.
<b>Data Year:</b> <input type="text" value="2000"/>	To change the data year, click the drop-down arrow and select the desired year. (Note: Changing the data year may alter the list of companies retrieved, a company statement type may change from year to year.)
<b>Sort:</b> <input checked="" type="radio"/> Name <input type="radio"/> Cocode	Sort the list of companies in the Company Select box by either CoCode or Company name.
<input type="text" value="#?"/>	Displays a list of how many entities have been selected from the list of available companies displayed in the Company Select box.
<b>Report Categories</b>	
<a href="#">Pick A Page [0]</a> <a href="#">Scoring [0]</a> <a href="#">Exam Jumpstart [0]</a> <a href="#">Profiles [0]</a> <a href="#">Loss Reserves [0]</a> <a href="#">FAH [0]</a> <a href="#">Analyst Team [0]</a> <a href="#">IRIS [0]</a> <a href="#">Compliance</a> <a href="#">Line Report</a>	A list of all financial reports available. (All reports may not be available for all companies for every year, but the link will always be displayed.)
<a href="#">Summary</a>	Displays a list of Financial Summary Reports. Click on a Summary Report to enter criteria and run the report.
<a href="#">Producer Data</a>	Displays a list of Market Conduct information. Select the desired report or application and a separate window for each company selected will display
<a href="#">Other Links</a>	Displays a list of navigation links to go to other places within I-SITE
<b>Miscellaneous</b>	
<b>Report Format:</b> <input type="text" value="HTML"/>	To change the report format for downloading, select the report format from the drop-down arrow. Report Format options include: HTML (Hypertext Markup Language), CSV (Comma Separated Values) or TAB (Tab Delimited).