

CUSTOMER RESOURCE CENTER

QUICK GUIDE



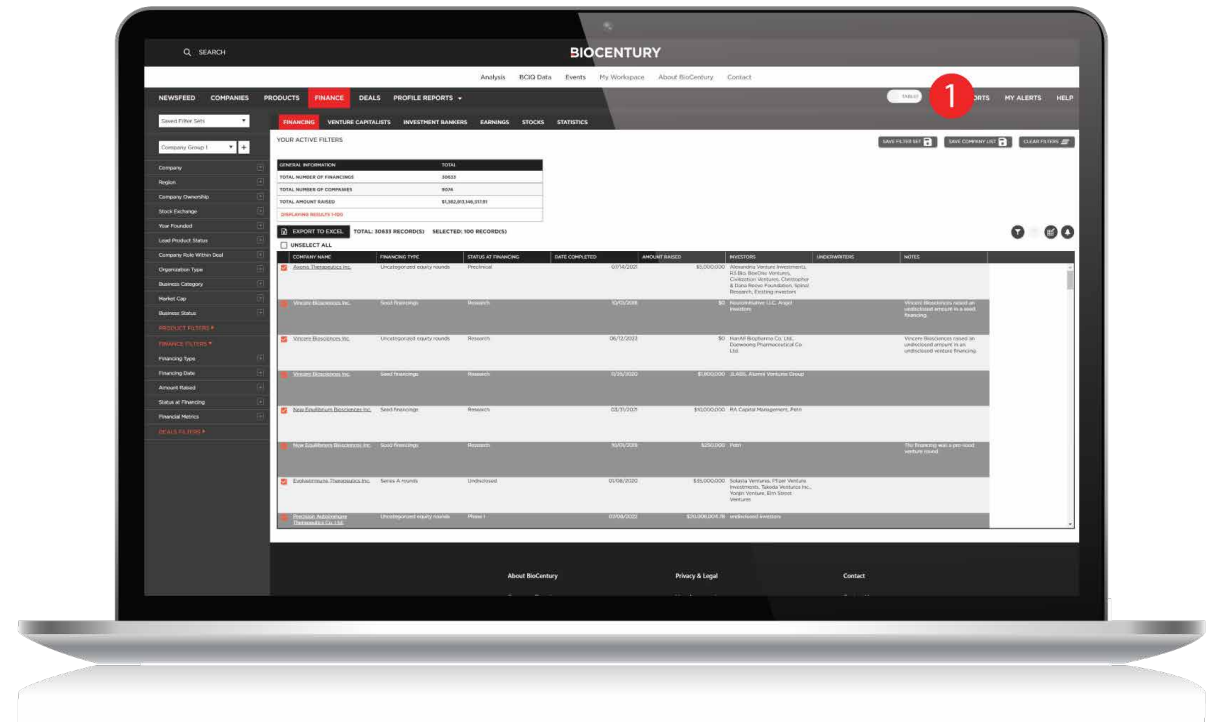
BCIQ **Tables View**

BCIQ's Table View allows you to customize your table with the columns you need, filter for further analysis, export to Excel, and set up alerts to track updates to customized reports. This Quick Guide will show you how to access Tables View and get the most out of your data.



Accessing Tables View

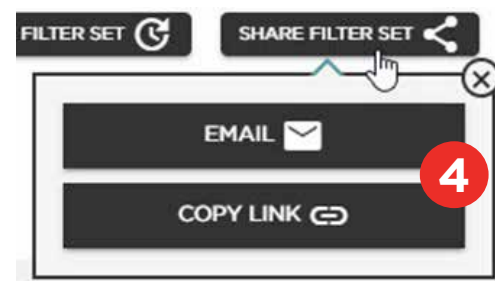
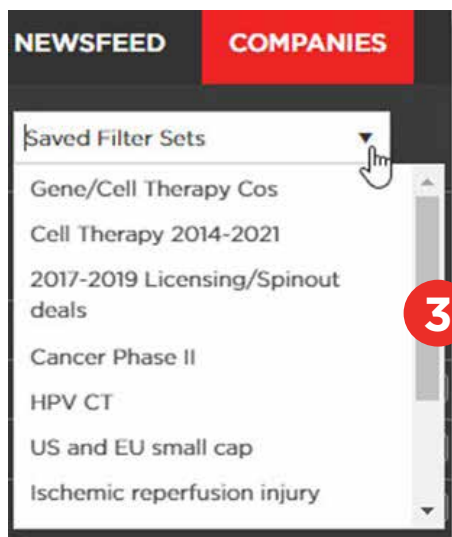
- 1 While in BCIQ, head to any of the **Modules** (Companies, Products, Finance or Deals) and click the **CHARTS** button at the top. The button will immediately switch to **TABLES**



Saving and Sharing Filter Sets

There are reports you will want to come back to in the future. Tables View allows you to access these reports quickly and efficiently through the Save Filter Set feature.

- 1 Select your desired filters from the left-hand menu as you would normally to create a report
- 2 Click **Save Filter Set**, enter a name for the filter set and click **Save**
- 3 Type the name of the saved filter set at the top left or click the arrow to **view all saved filter sets**
- 4 Once you save a report, you can share it with a fellow BCIQ user by clicking **Share Filter Set**. Select to email the report directly or copy a link to the report to share through your preferred communication pathway



Customizing the Table

While tables in Charts view have a default layout with certain columns, Tables View allows you to view all available columns for a table and select the ones you need for your personalized report.

- 1 Click the **Column Settings icon** located on the top right corner of the table
- 2 Select the columns you want to view in the table and click **Apply**. The report will not reset to its default, so you can always come back to the same column settings you selected
- 3 You may also change the order of the columns by **dragging** the column headers to the preferred position
- 4 The **Filter icon** allows you to perform a word search within a column for further specificity

The screenshot illustrates the 'Column Settings' dialog box. The dialog has a title bar 'COLUMN NAME' and a list of columns with checkboxes. The columns listed are: Company Name, Financing Type, Status at Financing, Date Completed, Amount Raised, Investors, Underwriters, Notes, Business Category, Share Price, Shares Sold, Filing Price, Date Filed, Overallotment, Shares Outstanding, Shares Proposed, Rate, Currency, Post-Money Valuation, and a partially visible 'Type of Last Financing'. The 'APPLY' button is highlighted with a red circle and a hand cursor, and is labeled with a red '2'. The 'CANCEL' button is also visible. The background shows a table with a 'TYPE OF LAST FINANCING' header and several rows of 'Series A rounds' data. A red '1' is placed over the Column Settings icon in the top right corner of the table, and a red '4' is placed over the Filter icon in the top right corner of the table.

COLUMN NAME	Selected
Company Name	<input checked="" type="checkbox"/>
Financing Type	<input checked="" type="checkbox"/>
Status at Financing	<input checked="" type="checkbox"/>
Date Completed	<input checked="" type="checkbox"/>
Amount Raised	<input checked="" type="checkbox"/>
Investors	<input checked="" type="checkbox"/>
Underwriters	<input checked="" type="checkbox"/>
Notes	<input checked="" type="checkbox"/>
Business Category	<input checked="" type="checkbox"/>
Share Price	<input checked="" type="checkbox"/>
Shares Sold	<input checked="" type="checkbox"/>
Filing Price	<input checked="" type="checkbox"/>
Date Filed	<input checked="" type="checkbox"/>
Overallotment	<input checked="" type="checkbox"/>
Shares Outstanding	<input checked="" type="checkbox"/>
Shares Proposed	<input type="checkbox"/>
Rate	<input type="checkbox"/>
Currency	<input checked="" type="checkbox"/>
Post-Money Valuation	<input checked="" type="checkbox"/>
Type of Last Financing	<input checked="" type="checkbox"/>

Export To Excel

While you can export from Charts View, it is highly recommended to do so from Tables View for a nicely formatted sheet.

- 1 Once you have all your filters and columns set, click **Export to Excel**

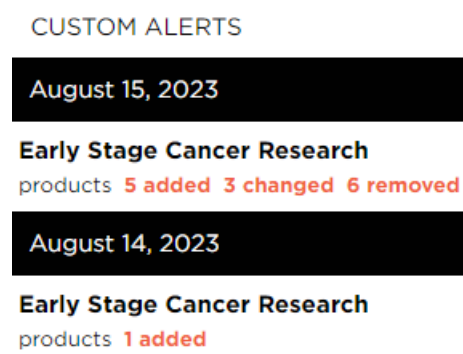
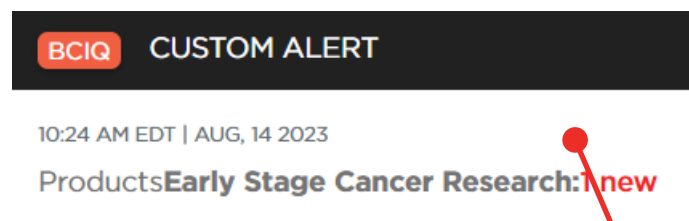
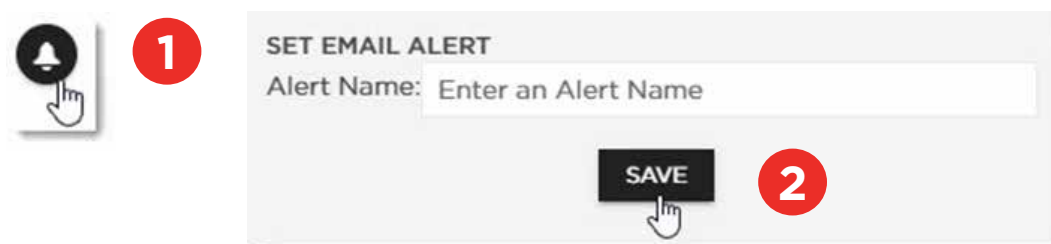
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Setting Up Alerts

The data in BCIQ is constantly being updated and curated, so reports can change drastically just as the biotech space does. It is highly recommended to set up alerts for these reports, so you are up to date with how the market is changing.

- 1 Click the **Set Email Alert icon**
- 2 **Enter a name** for the alert and click **Save**
- 3 These alerts will be sent to your **email**, and can also be found in both your **BCIQ Newsfeed**, as well as your **Saved Searches and Alerts** in your **Workspace** as a Custom Alert



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