Getting started with Orbis

Maarten Gubbels, NSM Library team 19-27 February 2018

What’s the plan?

➢ Further support
➢ Orbis in a nutshell
➢ Search criteria -> defining the dataset
➢ List view -> assigning the variables
➢ Exporting to Excel
➢ Company reports & corporate structure
Further support

- Contact me for short questions by mail or to make an appointment: m.gubbels@ubn.ru.nl
- Always mention: topic, supervisor and desired variables & historical timeframe
- Visit our office: 01.545 (next to MSc)
- Orbis Quick Reference Card (on our Library Guide)
- Orbis User Guide

Orbis in a nutshell

- Listed & non-listed companies
- Aggregated accounting data, financial ratios, shareholders information, directors characteristics etc.
- Corporate ownership and corporate structure
- Coverage: worldwide, last 10 years
- 5 simultaneous users
Delimit your dataset by adding criteria:

Dutch companies, paper manufacturing industry, >50 employees

Add more criteria -> test your query, e.g. by (un)checking boxes

Think about the consequences of each step!
Orbis – home screen (3)

Select e.g. ownership criteria

Tip: see also the extensive Ownership Guide in Orbis

Orbis – home screen (4)

Ownership: North American firms owning our Dutch companies.
Orbis – home screen (5)
Filter on availability of financials in certain years (optional)

Make sure you select the right category and test whether you do not downsize too much!

Orbis – home screen (6)
Just try things to see what works out…

Save your search (preferably on your local disk)!
Orbis – home screen (7)

Go to list view (‘view list of results’!)

Orbis – list view (1)

Standard variables -> pick your variables -> ‘add’ button

You can always go back to your query (‘home’), but do not ever use the back button of the browser!
Orbis – list view (2)

Add the desired variables (by clicking on them):

Use the tree-menu or search by keyword

Orbis – list view (3)

Customize the variables, e.g. year(s), currency:

Tip: the structure of the menu corresponds with the structure of the variable-filters in the home screen
Orbis – list view (4)

Always add identifiers, including at least the ISIN code!

Orbis – export (1)

Export the data…
Orbis – export (2)

to Excel or as .txt.

Orbis – export (3)

Clean the data in Excel or import the .txt into Excel
Orbis – company reports (1)
Select a company to view the report

Orbis – company reports (2)
Customize the report in the right column (applies for all reports in the dataset)
**Orbis – Company reports (3)**

Create an ownership report to get e.g. …

![Image of Orbis report]

**Orbis – Company reports (4)**

The corporate group

**Tip:** you can search for/filter on all kind of ownership data in the home screen

![Image of Orbis report]
Orbis – Company reports (5)

Ownership structure

Everything can be exported, as pdf or image as well