Getting started with the Amenity Analytics Viewer

Contents

Introduction

This guide is a brief overview of how to get started using the Amenity Analytics Viewer. We provide information on how to configure your network, create your portfolio, use Query Insights, and see Analytics.

In addition to this guide, we also provide an online Help Center at Help.AmenityAnalytics.com.

Creating your Portfolio

When opening The Viewer for the first time, you will see the following screen indicating how to create your portfolio.
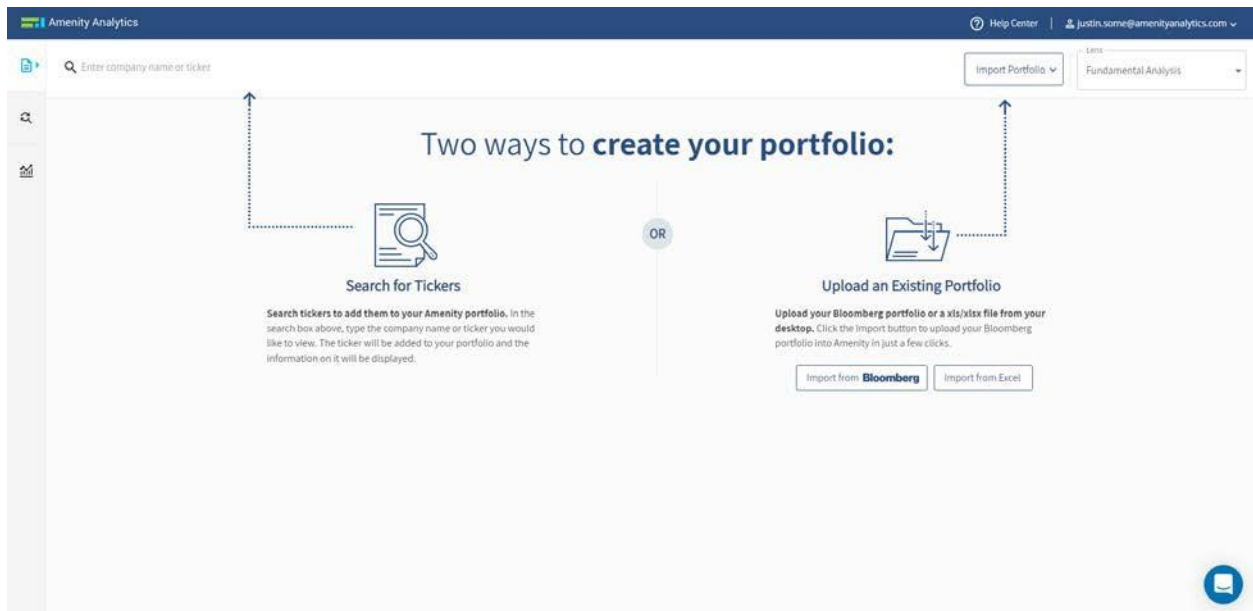
You can manually add tickers by searching for them, or you can import a list of companies from your portfolio in your Bloomberg Terminal Account, or from an XLS or XLSX file.

The list of companies will display in a list sorted alphabetically by ticker name by default.
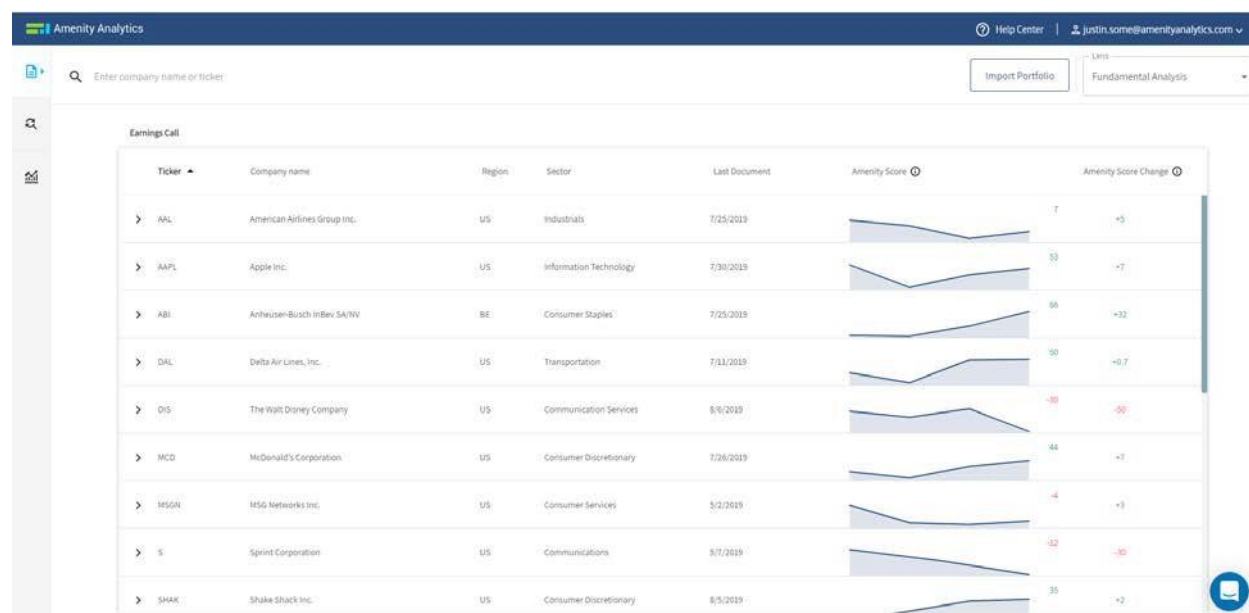
The Viewer allows you the ability to sort companies by clicking on the top row above your list of companies in your portfolio with the following categories

- Ticker
- Company Name
- Region
- Sector
- Last Document
- Amenity Score
- Amenity Score Change

Double-clicking on a type will reverse the order.

The Amenity Score

The Amenity Score is a weighted average of all positive and negative events in a document represented by a trend line ending in a score of the most recent document. In presenting the change in the Amenity Score, we provide both the raw arithmetic difference between transcripts and the corresponding percentage change.

We calculate the percentage change with the following formula:

Percent change = (Current Amenity Score + 100) divided by (last month Amenity score + 100) – 1.

The percentage change will never be less than -100% but can be well above 100%.

The Company View

Inside of your portfolio, you can click on each company to retrieve more information than the default displayed information. Inside of The Company View, you will be able to view more details for each company depending on what is flag including, but not limited to:

- Deception
- Cost/Price
- Guidance
- Market Position
- Capital Deployment & Structure
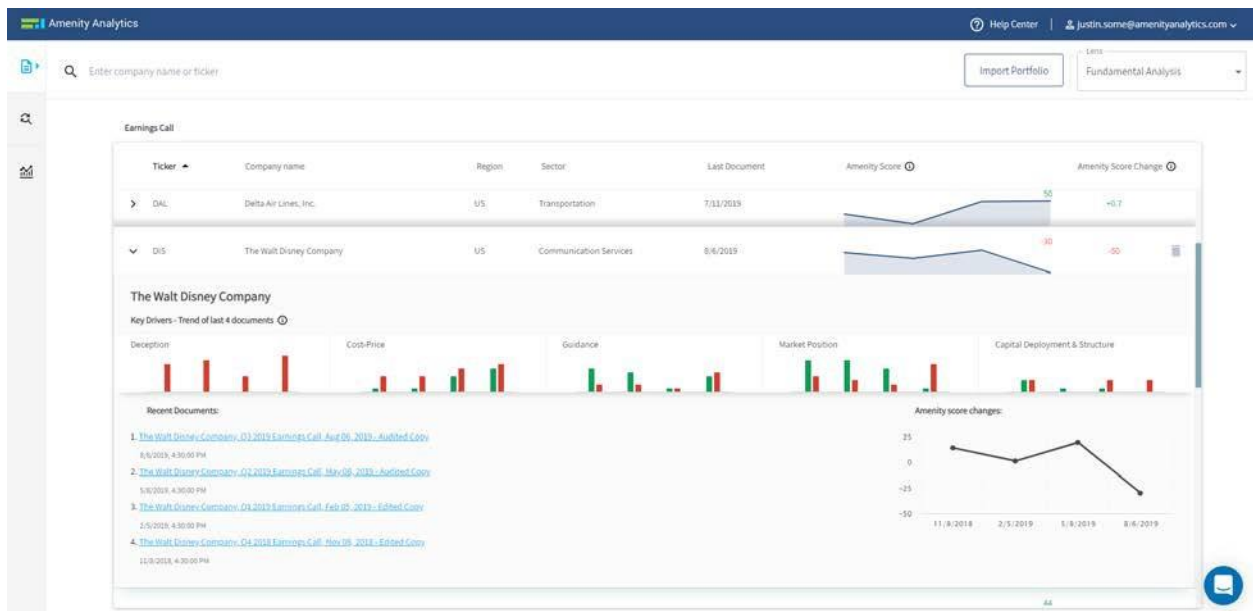
The bars offer the ability to view events over the four most recent company events. Highlighting over each bar will display the number of events in each document and date of event. The most recent earnings call will be on the right of each section.

Reading an Earnings Call

After opening an earnings call of a company, you will see that the document is broken into different sections. As you scroll through the document, you will see who the person speaking is during the earnings call, and who the people are asking questions and providing answers.

In the image below, you will be able to see how an earnings call is presented in the Amenity Viewer, with two highlighted aspects.

1. The left side panel is key driver events throughout the earnings call. Clicking on each category will display positive and negative events, and each will provide the ability to scroll to specific sections of the document. You also can switch to the participant's tab, allowing you to move to specific sections of the document depending on who is speaking, as well as for specific questions and answers asked.

2. The top menu allows you to do the following
   a. Print
      i. When selecting to print The Viewer will prompt you for what paper size you want to write on.
      ii. If you want to save the Earnings Call as a PDF, you can do that when the print menu of your browser appears and select to save as a PDF
   b. Copy Link
   c. Annotation
      i. Annotations will allow you to add your own positive and negative events to an earnings call document. [You can view more information about using Annotations here](.).

Query Insights

Query Insights allows you the ability to search for trends and specific keywords across all companies that have transcripts in The Viewer.

In the below screenshot you will be able to see filters that can be set and trending queries.

1. Filters are in the top right corner, and any of the three buttons can change the variables on a given search.
2. Trends in Query Insights get picked on the most popular searches performed by our users, as well as other current trends.
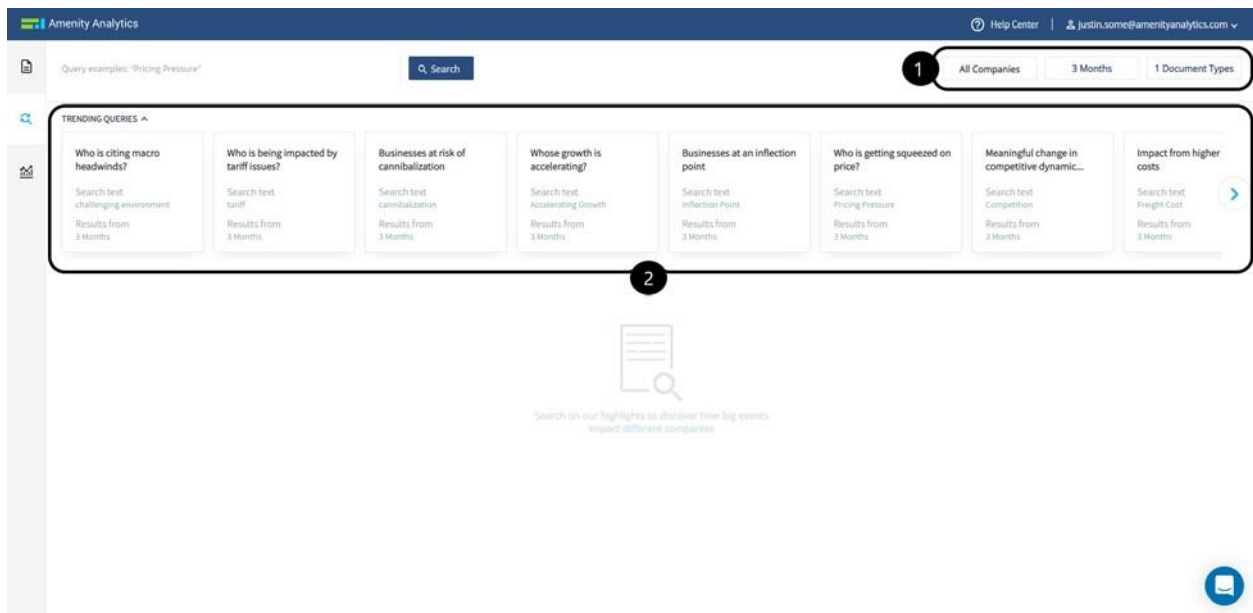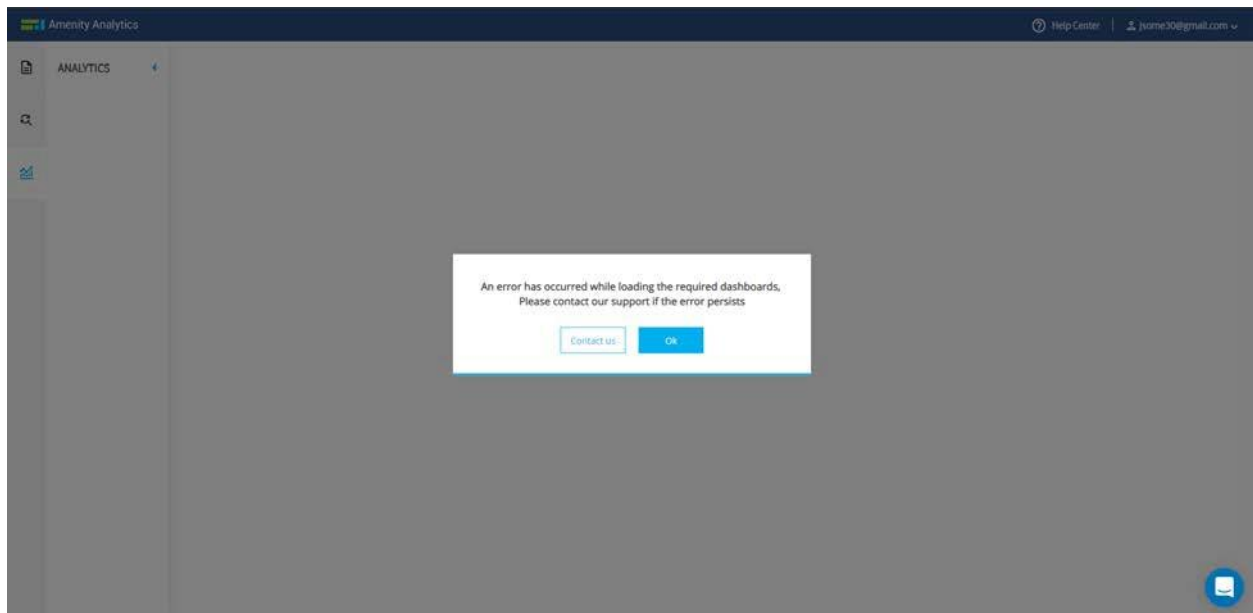

Analytics

Analytics allows you the ability to view more information on subjects like deception dashboards, fundamental dashboards, and more. Analytics is available as an add-on to an account. If you do not have access to view dashboards in the Analytics screen, you will see the following view as a default.
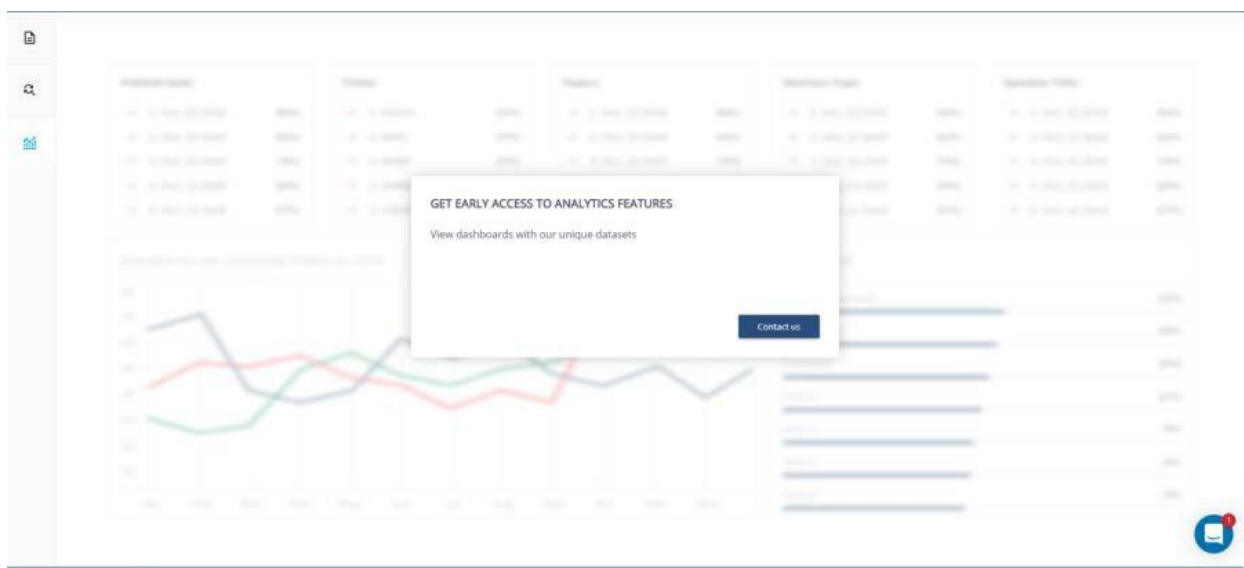
You may also see the following screen as well.

If you have access to any of the dashboards you will see the list of dashboards displayed on the left side of your screen, and the list of menus that are available. Below you can see how Deception Dashboards are displayed in the Analytics tab in The Viewer.

Configuring your computer and network for Analytics

If you are using the Viewer and have access to the Analytics screen, you will need to make sure that the following websites are whitelisted on your network by your onsite IT Team:

- Auth0.com
- Qlik-amenity.bardesscloud.com
- Intercom.io
- https://transcripts-viewers.amenityanalytics.com

On your computer, you will need to make sure that third party cookies are enabled in Google Chrome. If you choose to continue to block third-party cookies, you will need to allow cookies from the above websites by following the instructions at the link here: Why am I experiencing issues loading the Analytics Dashboard.

Depending on the network setup, your IT team may also need to open Port 443 to allow full access to the Analytics screen in The Viewer.

Further Questions

If you need further assistance with setting up your account, please visit help.amenityanalytics.com. On the Help Center you can find articles to get your account started further, tutorial videos, and a frequently asked questions section.

If you have any questions while using The Viewer, please feel free to reach out to us over our messenger on our website. Our hours are Monday-Friday 9 am-6 pm Eastern Time.