



ON-DEMAND TRAINING

The Hockeystick Interface Transcript

Welcome to this video on the Hockeystick interface.

You can download this video's transcript to follow along. We're currently on a fund's Portfolios Page and start screen. Let's go over some of the various areas of the screen.

Top Menu

At the top, we have our menu bar which includes Settings, Support and Notifications. The menu contains a lot of powerful options, I recommend clicking through to see what options they contain. Keep in mind, that the notification icon will only appear when you have a notification. This menu also includes a drop-down which navigates to your email and language preferences, along with your password, avatar and more.

The logo button here brings us back to the Portfolios Page where Hockeystick visualizes a fund's data.

Side Menu

To the left of the screen is the side menu. It's through these icons that we can navigate to see all the companies we're receiving reporting information from, all of their published reports, and add and remove users. Let's take a closer look.

Company's Page

In the Company's page, we can see all the companies that we're receiving reporting information from. As you can tell, Hockeystick shows if a company has filed their latest report or not. This is also where you can invite companies to start filing your fund's Hockeystick reports.

Reports Page

Once companies start filing reports it gets pushed to the Reports Page. We will also receive an email notification after a company has filed.

People Page

This is the People Page, and it's where we can add and remove users.

Data Exports

Fund data can be exported in two ways, the Global Export and Export CSV buttons. The Global Export button produces an .XSL file of all the data in a fund, while the Export CSV button has the details of a single report template.

Exported reports are up-to-date, secure, and viewable in Microsoft Excel.

Dashboard Widgets

Hockeystick automatically turns a fund's financial data into visual reports through the dashboard and chart widgets. They give a snapshot of how a portfolio is doing and gives the fund the ability to analyze their metrics.

The Custom Report section is where custom exports are stored for funds. Hockeystick creates these Excel exports for funds based on their personalized requirements.

Deal Books are used by funds to export portfolio information in any easy-to-follow and professional format. It can include an in-depth review of a company's operations, finances, sales, marketing, customers, employees, facilities, and more. We recommend that users utilize this export when they need to provide information to their limited partners, boards of directors etc.

Company Start Screen

Let's look at a company's account interface.

When you invite a company to start filing on Hockeystick, they get an email invitation to join. After signing up, they are brought to their Reports Page and start screen. It's here that they can see if they have published all of their reports, or if any are outstanding.

As you can see, the colours of a company's profile are much lighter than a fund's.

Company Menus

Similar to a fund's UI, the left of the screen is the side menu. It's through these icons that we can navigate to see all our published reports, company information and add and remove users. At the top we have our menu bar, which includes settings, support and notifications.

Call to Action

Thank you for watching this video on the Hockeystick Interface. We invite you to continue with the Free Training videos to learn more about using Hockeystick.