Professional Data

Xpressfeed™ User Guide

S&P Global
Market Intelligence

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Document Overview

What You Will Find in This Manual

The purpose of this manual is to provide a comprehensive overview of the **S&P Capital IQ Professional** data set. This manual describes the

- Methodology for the collection of the Professional data, data structure, including schemas, tables, and all other tangible components of the data
- Linking of Professional data with S&P Capital IQ Base Files
- Common ways of querying the Professional packages with SQL examples

Who Should Read This Manual

This manual is for use by Xpressfeed clients utilizing the Xpressfeed Loader and those who directly download the files from the FTP server and write their own loading procedures.

The Xpressfeed Loader generates a database schema and structure and loads Professional data as a set of fully indexed tables. The Xpressfeed Loader automates the daily updates of Professional data and keeps your database up to date.

Other supporting documentation includes

- *S&P Capital IQ Base Files User Guide,* which describes the type of data included in the Base files, the data structure of the Base Files and all other tangible components of the data, as well as integration of Base Files with other S&P Capital IQ data sets.
- *Xpressfeed Loader User Guide,* which outlines the features and capabilities of the Xpressfeed Loader.

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Executive Summary

Introduction to S&P Capital IQ Data

S&P Capital IQ provides over 120 financial and non-financial data sets to help clients enhance proprietary analytics, backtest investment theses, populate financial models, analyze portfolios, and support financial portals, CRM systems, and other integrated business applications. Our clients value S&P Capital IQ data for its breadth, depth, accuracy, timeliness, and ease of integration.

Professional Data

The S&P Capital IQ Professional data set profiles professionals with current and prior board/company affiliations. Data includes biographies, standardized job functions, titles, education, compensation, options holdings, and full committee memberships.

The Professional data enables you to:

- Gain insight on an individual's career history and professional relationships with current and prior information integrated into profiles of public and private company executives, board members, and investment professionals, globally
- Research individuals based on biography, contact data, education, compensation, affiliations, and corporate board membership information
- Make associations with a person's professional past, aligning a person's experience and relationships with your specific needs
- Focus on key decision makers, and not rank-and-file employees
- View committee membership details for board members and executives

Highlights

- More than 4.5 million professionals
- Compensation history going back to 1992
- Over 40 different compensation types

About Professional Data Packages

S&P Capital IQ delivers Professional data through the following data packages:

S&P Capital IQ Professional This is the core package and it delivers all the person and professional information contained in the S&P Capital IQ database. In particular, this package delivers unique person identifiers and the professional relationships for each person, as well as descriptive information that includes biographies, specialties, job functions, coverage, educational relationships and compensation data.

S&P Capital IQ Person Professional This package is a subset of the S&P Capital IQ Professional package and delivers a smaller content set of professionals and board members and the companies for which they work, along with other descriptive data, including compensation.

S&P Capital IQ People Basic This package is a subset of the S&P Capital IQ Professional package and delivers a smaller content set of unique person identifiers and professional relations for each person, as well as other descriptive information that includes specialties and job functions.

S&P Capital IQ Compensation Detail This package is a subset of the S&P Capital IQ Professional package and delivers compensation data for the executives of public companies.

Methodology

S&P Capital IQ collects and maintains professional data using the Single Person data model with consolidated career history. S&P Capital IQ maintains a single record for any one person, so that all of the former executive and board relationships associated with that person are retained under one entity; the data is fully integrated so that any one person appears only once and is linked to all of the companies for which the person works or has worked, and to all boards on which the person serves or has served. The Single Person approach allows you to obtain a complete view of a person's career history and make associations with a person's professional past, aligning a person's experience and relationships with your specific needs.

The data in every single record is further maintained using a multi-faceted approach that includes: cyclical validation, web content mining, S&P Capital IQ-collected Key Developments data, and company surveys. The combination of these approaches enables the Professional data set to cover professionals in a wide and diverse range of companies and data items in a timely and comprehensive way.

For details on the methodology, please see the Methodology section.

Professional Data Schema

The S&P Capital IQ Professional database schema is normalized to eliminate data inconsistency and redundancy. Primary keys appear in bold font in the database tables and are designated with the initials ‘PK.’ All schemas reflect Xpressfeed Loader table names. The associated file name for non-Loader clients is given in parentheses beneath each table.

S&P Capital IQ Professional Database Schema

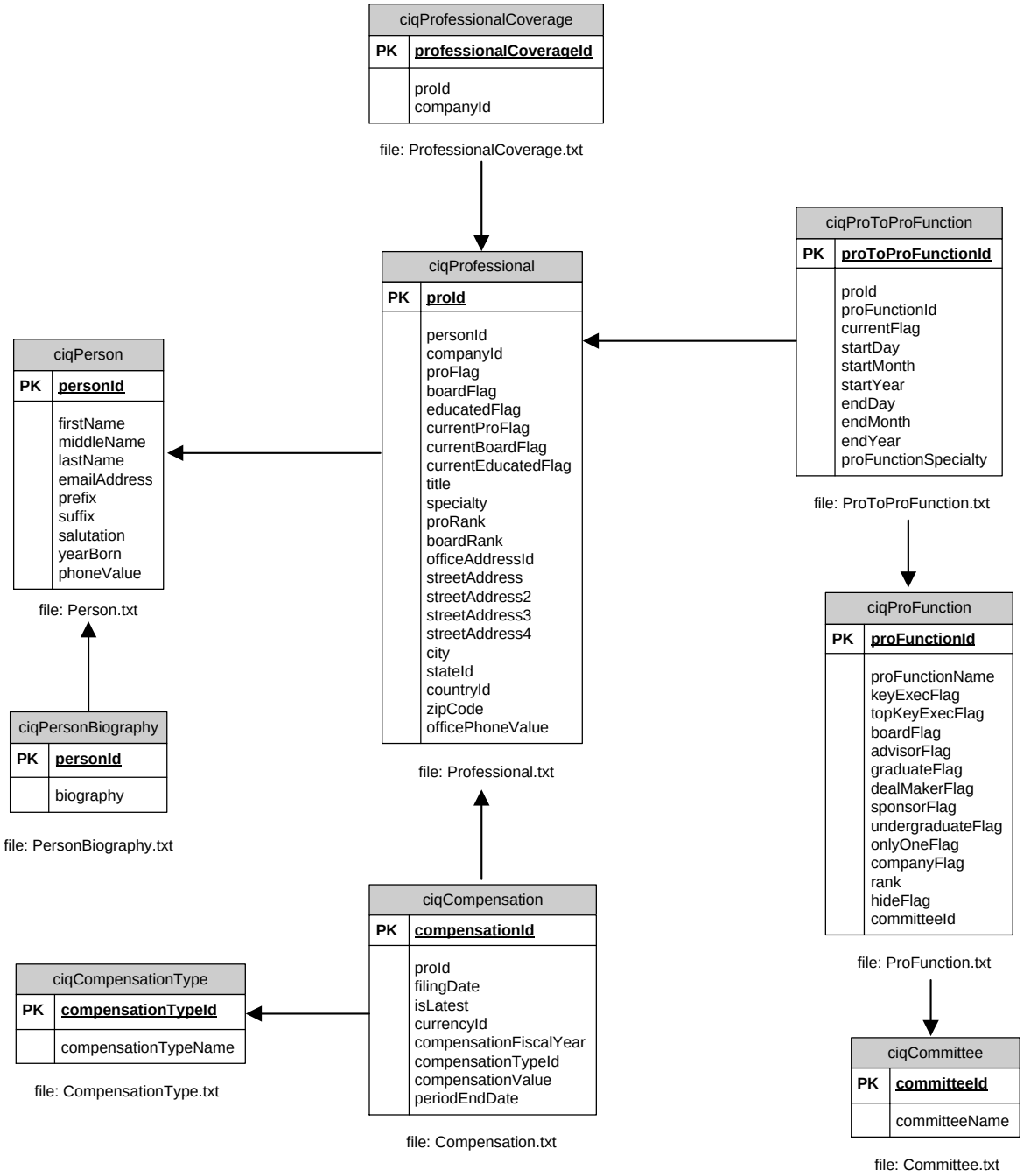

Figure 1. S&P Capital IQ Professional Schema

Note: The Professional data set consists of data and reference tables as follows:

Data Tables	Reference Tables
ciqProfessional Coverage	ciqCompensationType
ciqPerson	ciqProFunction
ciqPersonBiography	ciqCommittee
ciqProfessional	
ciqProToProFunction	
ciqCompensation	

For a description of these tables and the fields in each table, please see Professional Package Table Descriptions.

S&P Capital IQ Person Professional Database Schema

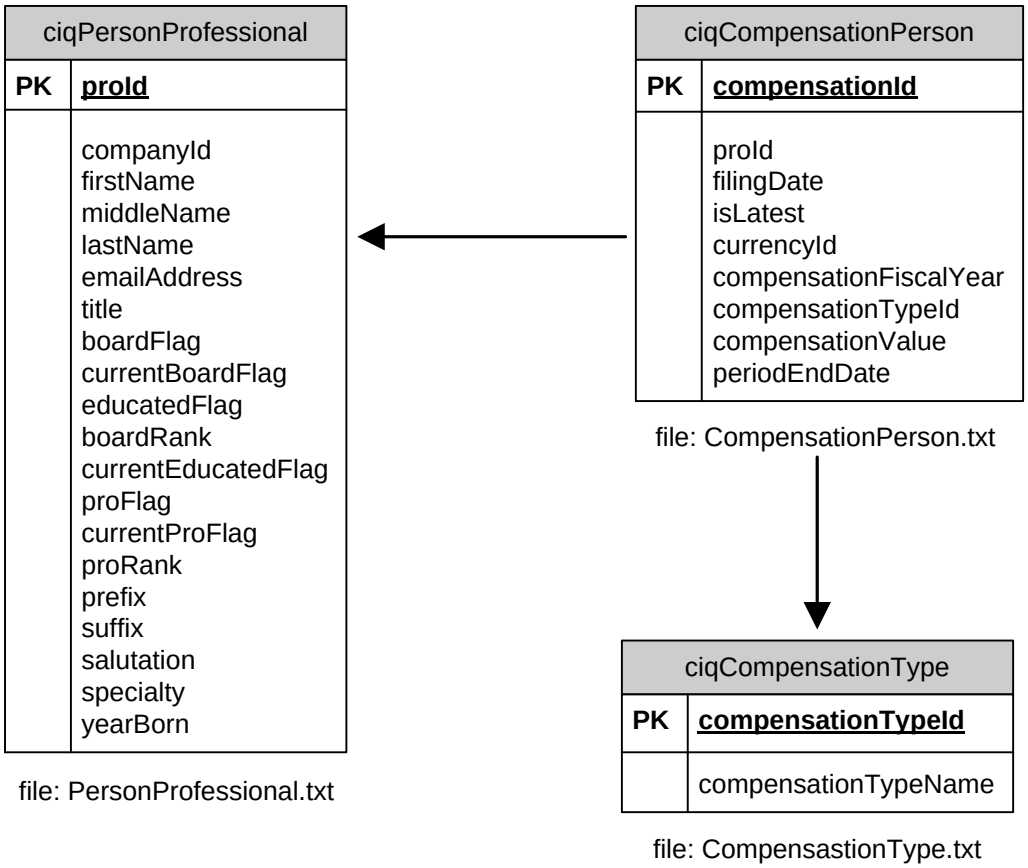

Figure 2. S&P Capital IQ Person Professional Schema

Note: The Person Professional data set consists of data and reference tables as follows:

Data Tables	Reference Tables
ciqPersonProfessional	ciqCompensationType
ciqCompensationPerson	

For a description of these tables and the fields in each table, please see Person Professional Package Table Descriptions.

S&P Capital IQ People Basic Database Schema

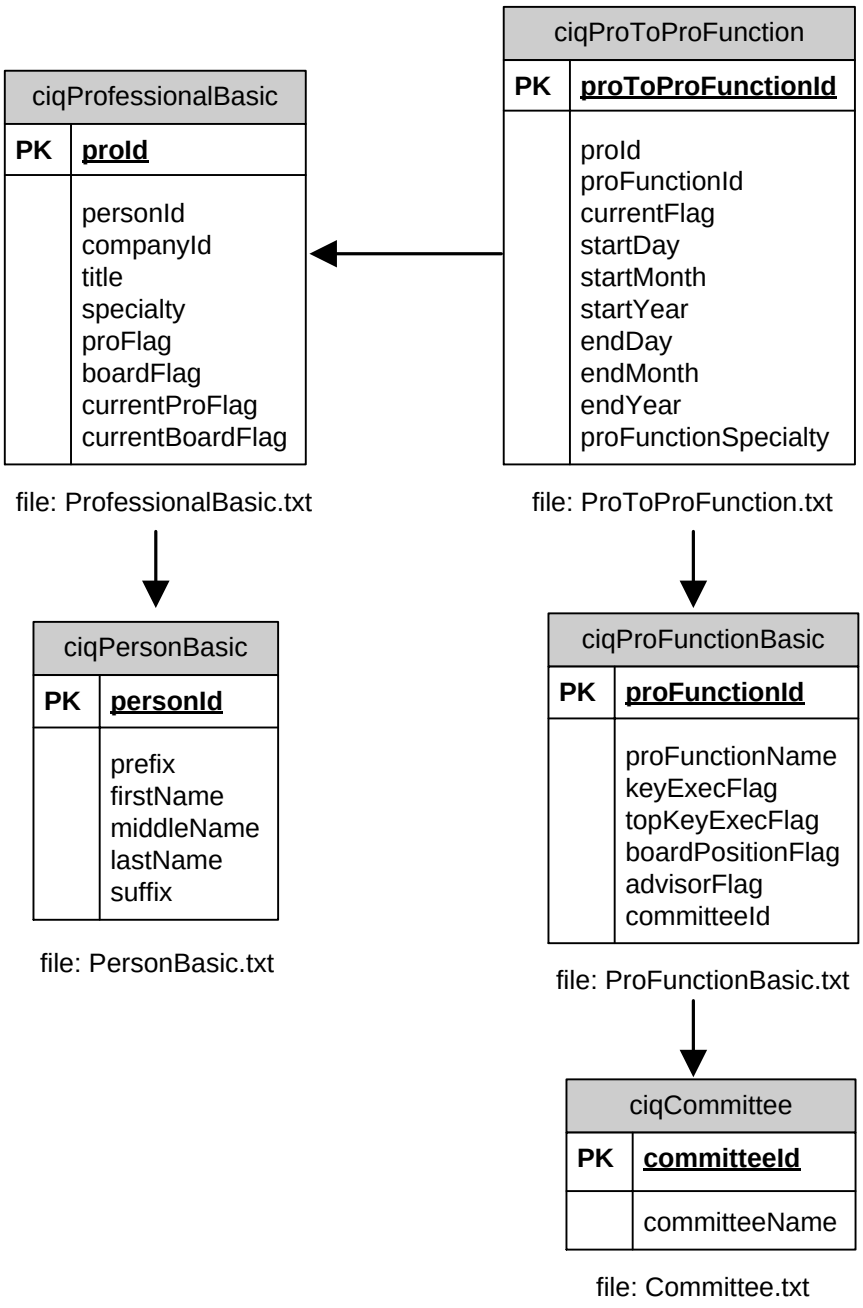

Figure 3. S&P Capital IQ People Basic Schema

Note: The Professional data set consists of data and reference tables as follows:

Data Tables	Reference Tables
ciqProfessionalBasic	ciqProFunctionBasic
ciqPersonBasic	ciqCommittee
ciqProToProFunction	

For a description of the tables and the fields in each table, please see People Basic Package Table Descriptions.

S&P Capital IQ Compensation Detail Database Schema

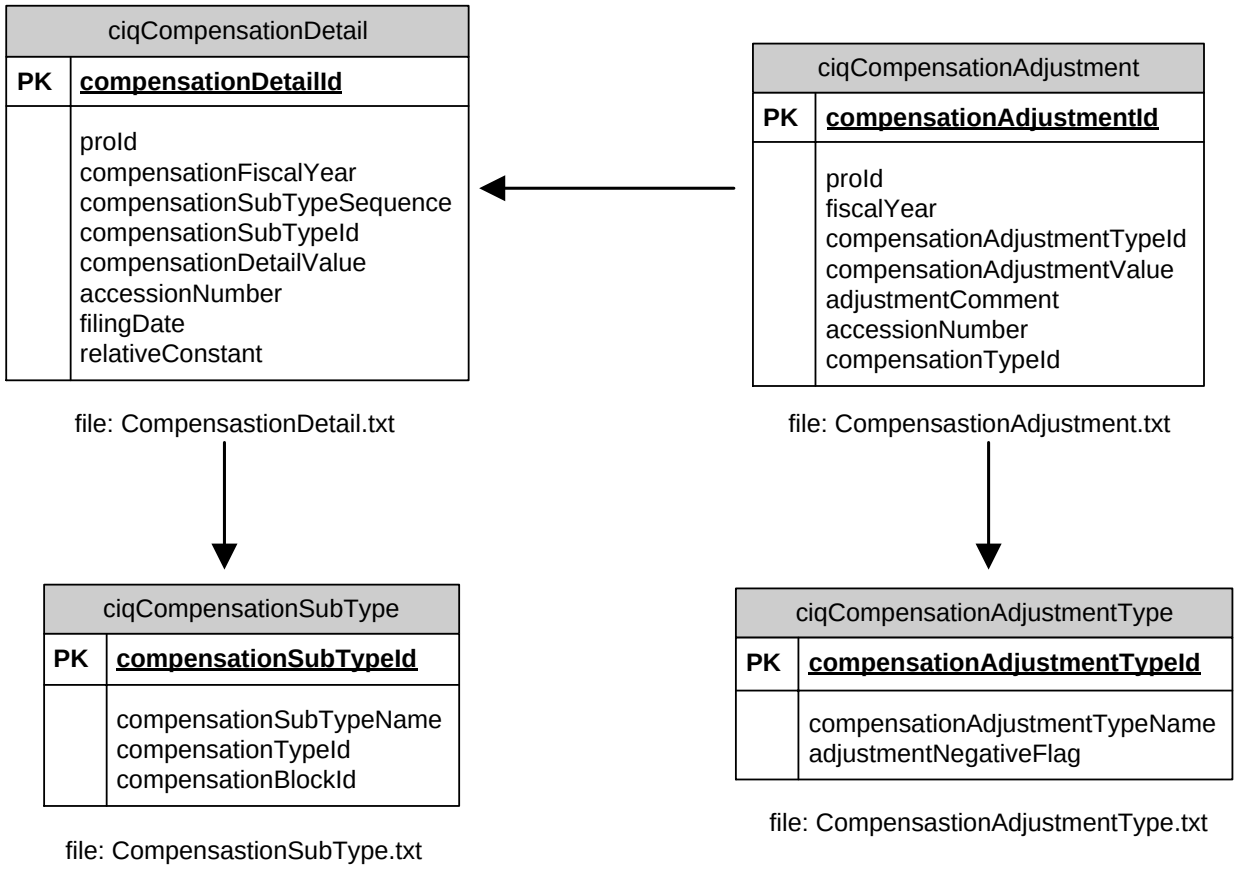

Figure 4. Capital Compensation Detail Database Schema

Note: The Compensation Detail data set consists of data and reference tables as follows:

Data Tables	Reference Tables
ciqCompensationDetail	ciqCompensationSubType
ciqCompensationAdjustment	ciqCompensationAdjustmentType

For a description of the tables and the fields in each table, please see Compensation Detail Package Table Descriptions.

Linking to S&P Capital IQ Base Files

The Base Files are the required foundation for all other S&P Capital IQ data packages. The Base Files provide a base set of companies, symbols and data items from which to link across all other S&P Capital IQ data sets.

The individual Base Files you receive vary depending upon your S&P Capital IQ data package subscription. If you have any questions, please contact your account team.

S&P Capital IQ Professional

The **ciqProfessional** table has direct links to the Company File through c*ompanyId*.

S&P Capital IQ Person Professional

The **ciqPersonProfessional** table has direct links to the Company File through c*ompanyId*.

S&P Capital IQ People Basic

The **ciqProfessionalBasic** table has direct links to the Company File through c*ompanyId*. This package can be used in conjunction with any package that contains a *personId* or a *proId*, where the compensation and education information is not required.

S&P Capital IQ Compensation Details

The **ciqCompensationDetail** table and the **ciqCompensaionAdjustment** table can be used in conjunction with any package that contains a *proId*.

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Methodology

Note: Unless otherwise indicated, the discussion below applies to public and private companies, private equity/venture capital firms, investment managers and advisors.

Sources of Data

To ensure a comprehensive, consolidated Professional data set, S&P Capital IQ uses a wide variety of sources and techniques to collect its Professional universe:

U.S. and Canadian Companies

- ***Regulatory Filings:*** Forms 8-K, 10-Q, 10-K, DEF 14A, 40-F, 20F, quarterly and annual reports from various regulatory organizations, and Prospectus forms. These agencies include the U.S. Securities and Exchange Commission (SEC) via EDGAR, Canadian Securities Administrators (CSA) via SEDAR, Australian Securities & Investments Commission (ASIC) via ASX, and the Regulatory News Service (RNS), which is owned by the London Stock Exchange for U.K. companies.

- ***News Aggregators:*** S&P Capital IQ follows a variety of Newswires (e.g., Nexis®, Factiva Select, PE Week Wire, Globes online, AltAssets, and FSA Register), searching for news articles, press releases, and corporate announcements, in English as well as in select local languages.

- ***Company websites:*** Public, private, private equity, venture capital, investment firms and advisor firms are profiled directly from the company's own website. Changes on the professional and board pages on the company's websites are captured through web-monitoring.

- ***Company Surveys:*** S&P Capital IQ is regularly in touch with public companies as a means of gathering information.

- ***Key Developments:*** S&P Capital IQ's Executive Change Key Developments data serves as a source for interim data processing. As the Key Developments team scans thousands of sources daily, it passes all relevant executive change announcements on to the Professional data set team.

Rest of the world (non-U.S. and non-Canadian Companies)

Sources include prospectuses and other circulars, material change reports, company announcements, notices and circulars, 'Glossy' reports, and regular updates for Public Offering and Shelf Registrations for Rest of the World. These agencies include the U.S. Securities and Exchange Commission (SEC) via EDGAR, the Canadian Securities Administrators (CSA) via SEDAR, the Australian Securities & Investments Commission (ASIC) via ASX, and the Regulatory News Service (RNS) which is owned by the London Stock Exchange for U.K. companies.

Data Maintenance

S&P Capital IQ maintains the Professional data set through a combination of approaches outlined below.

Cyclical Validation

S&P Capital IQ validates its entire universe of operating public companies once a year. As annual filings are published and/or filed by companies, S&P Capital IQ compares the documents with existing data and makes appropriate changes.

Daily News

S&P Capital IQ follows daily announcements and updates from stock exchanges, regulatory authority websites, specialized news providers, news aggregators, and web-mining agents.

Web Content Mining

S&P Capital IQ uses web-mining agents to monitor the information that is added to or removed from a company's website. Because a significant percentage of these changes occur without a public announcement, web content mining enables S&P Capital IQ to include timely updates to the Professional data set. Once alerted to such web content changes, S&P Capital IQ evaluates the information and determines whether and how the data will be reflected in the Professional data set.

Company Surveys

S&P Capital IQ surveys public companies directly at frequent intervals as a means of not only gathering Professional data but of confirming data collected from other sources as well. S&P Capital IQ evaluates the returned surveys and determines whether and how the surveyed information will be reflected in the professional data set

Coverage Universe

The universe of companies includes:

- Public companies and public investment firms
- Private companies, private investment firms, corporate investment arms, and financial services investment arms
- Other non-standard types, such as unions, educational institutions, etc.
- Operating companies, operating subsidiaries, and reorganizing companies
- Out-of-business companies, acquired companies, and liquidating companies

S&P Capital IQ tracks Professional developments for companies operating in all major markets, including:

- U.S. and Canada
- Europe
- Asia
- Middle East
- Latin America

The Professional data team processes sources in English, as well as in local languages, including French, German and Spanish (Europe); and Japanese, Korean and Mandarin (Asia); and Arabic and Hebrew (Middle East).

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Professional Package Table Descriptions

Data Tables

Professional Table

The **Professional Table** relates a Person and a Company. The type of relationship between the two entities is described by a number of fields, including *proFlag* and *boardFlag.*

ciqProfessional	
PK	**proId**
	personId companyId proFlag boardFlag educatedFlag currentProFlag currentBoardFlag currentEducatedFlag title specialty proRank boardRank officeAddressId streetAddress streetAddress2 streetAddress3 streetAddress4 city stateId countryId zipCode officePhoneValue

file: Professional.txt

Below you will find a description for each column in the Professional table.

Table 1. Professional table fields

Column Name	Data Type	Description
proId	int	Unique identifier for a professional. A professional is the instance of a person being associated to a company, educational institution, etc.
personId	int	Unique identifier for every person in the S&P Capital IQ database.
companyId	int	Unique identifier for the company in the S&P Capital IQ data set to which the professional is affiliated.
proFlag	bit	Flag to denote whether the person ever worked at this company.
boardFlag	bit	Flag to denote whether the person was ever on the board of this company.
educatedFlag	bit	Flag to denote whether the person was educated at the educational institution indicated by the *companyId*.
currentProFlag	bit	Flag to denote whether the person currently works at this company.
currentBoardFlag	bit	Flag to denote whether the person is currently on the board of this company.
currentEducatedFlag	bit	Flag to denote whether the person is currently a student at the educational institution indicated by the *companyId*.
title	varchar(500)	Professional's title at this organization
specialty	varchar(200)	Specifically used for Private Equity professionals, this denotes the industry or other specialization they focus on.
proRank	int	Sort order (ranking) for the professional in the organization.
boardRank	int	The ranking of the professional on the board. The board member types are ranked (e.g., chairman = 1) and then ordered.
officeAddressId	int	Identifier for the primary office address of a particular professional; it is used to link to the address table.
streetAddress	varchar(200)	First line of the primary office address for a particular professional.
streetAddress2	varchar(200)	Second line of the primary office address for a particular professional.

Column Name	Data Type	Description
streetAddress3	varchar(200)	Third line of the primary office address for a particular professional.
streetAddress4	varchar(200)	Fourth line of the primary office address for a particular professional.
city	varchar(100)	The city of the primary office address for a particular professional.
stateId	int	State Identifier of the primary office address for a particular professional.
countryId	int	Country Identifier of the primary office address for a particular professional. (*countryId* maps to **refcountryGeo** table.)
zipCode	varchar(50)	Zip code of the primary office address for a particular professional.
officePhoneValue	varchar(50)	Main phone number of the primary office for a particular professional.

Professional Coverage Table

The **Professional Coverage Table** describes which professionals "cover" what companies in their portfolios. This information is available primarily for private equity funds.

ciqProfessionalCoverage	
PK	**professionalCoverageId**
	proId companyId

file: ProfessionalCoverage.txt

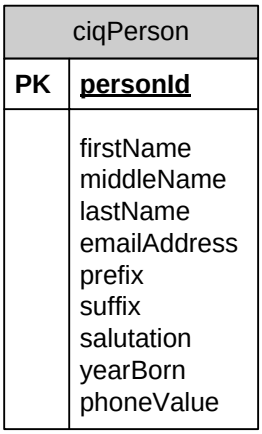
Below you will find a description for each column in the Professional Coverage table.

Table 2. Professional Coverage table fields

Column Name	Data Type	Description
professionalCoverageId	int	Unique identifier for the ciqProfessionalCoverage table.
proId	int	Unique identifier for a professional. A professional is the instance of a person being associated to a company, educational institution, etc.
companyId	int	Unique identifier for the company in the S&P Capital IQ data set to which the professional relates.

Person Table

The **Person Table** provides a unique identifier and the related information about every person in the S&P Capital IQ data set.



file: Person.txt

Below you will find a description for each column in the Person table.

Table 3. Person table fields

Column Name	Data Type	Description
personId	int	Unique identifier for every person in the S&P Capital IQ database.
firstName	varchar(50)	First name of the person.
middleName	varchar(50)	Middle name of the person.
lastName	varchar(50)	Last name of the person.
emailAddress	varchar(50)	Email address for a professional.
prefix	varchar(50)	Title used before a person's name, such as "Mr.," "Mrs.," "Ms.," "Dr.," etc.
suffix	varchar(50)	Designation used after a person's name, such as "Jr.," "Sr.," "Ph.D.," "I," "II," "III," etc.
salutation	varchar(50)	For some people, the name or nickname they prefer to be called.
yearBorn	int	Year the professional was born.
phoneValue	varchar(50)	Text of the phone number.

Person Biography Table

The **Person Biography Table** provides information describing the experience of the person being profiled.

ciqPersonBiography	
PK	**personId**
	biography

file: PersonBiography.txt

Below you will find a description for each column in the Person Biography table.

Table 4. Person Biography table fields

Column Name	Data Type	Description
personId	int	Unique identifier for every person in the S&P Capital IQ database.
biography	varchar(7000)	Textual information describing the experience of the person profiled.

Pro To Pro Function Table (Professional To Professional Function Table)

The **Pro To Pro Function Table** provides information that relates a professional to the job functions the professional performs (e.g., Bill Gates to Chairman of Microsoft).

ciqProToProFunction	
PK	**proToProFunctionId**
	proId proFunctionId currentFlag startDay startMonth startYear endDay endMonth endYear proFunctionSpecialty

file: ProToProFunction.txt

Below you will find a description for each column in the Pro To Pro Function table.

Table 5. Pro To Pro Function table fields

Column Name	Data Type	Description
proToProFunctionId	int	Unique identifier of the professional performing certain job functions.
proId	int	Unique identifier for a professional. A professional is the instance of a person being associated to a company, educational institution, etc.
proFunctionId	int	The identifier for a given *proFunction*. A *proFunction* is a standardized way to describe titles across different firms.
currentFlag	bit	Flag to denote whether relationships of this type are current.
startDay	int	Start day of this record.
startMonth	int	Start month of this record.
startYear	int	Start year of this record.
endDay	int	End day of this record.
endMonth	int	End month of this record.
endYear	int	End year of this record.

Column Name	Data Type	Description
proFunctionSpecialty	varchar(200)	Textual information about the specialty of a professional as it relates to the job functions the professional performs.

Compensation Table

The **Compensation Table** provides information on a professional's compensation.

ciqCompensation	
PK	**compensationId**
	proId filingDate isLatest currencyId compensationFiscalYear compensationTypeId compensationValue periodEndDate

file: Compensation.txt

Below you will find a description for each column in the Compensation table.

Table 6. Compensation table fields

Column Name	Data Type	Description
compensationId	int	Unique identifier for a compensation record.
proId	int	Unique identifier for a professional. A professional is the instance of a person being associated to a company, educational institution, etc.
filingDate	datetime	Date the SEC document describing this compensation was filed.
isLatest	bit	This column denotes if this row is the latest.
currencyId	int	Unique identifier for a given currency.
compensationFiscalYear	int	Fiscal year for this record.
compensationTypeId	int	Identifier for the type of the compensation. For details, see Table 12.
compensationValue	decimal	Value column for the compensation.
periodEndDate	datetime	The date on which the period ends.

Reference Tables

Pro Function Table

The **Pro Function Table** contains the reference data describing the job functions of professionals. (A job function is a normalized version of a title in order to enable aggregation across companies that have different titles, but the same job functions.)

ciqProFunction	
PK	**proFunctionId**
	proFunctionName keyExecFlag topKeyExecFlag boardFlag advisorFlag graduateFlag dealMakerFlag sponsorFlag undergraduateFlag onlyOneFlag companyFlag rank hideFlag committeeId

file: ProFunction.txt

Below you will find a description for each column in the Pro Function table.

Table 7. Pro Function table fields

Column Name	Data Type	Description
proFunctionId	int	The identifier of a given professional function. (A *proFunction* is a standardized way to describe titles across different firms.) For examples, see Table 8.
proFunctionName	varchar(100)	This is the descriptive value of the *proFunctionId.* For examples, see Table 8.
keyExecFlag	bit	If this *proFunction* is one that denotes a Key Executive of a company, this field will have a '1.'

Column Name	Data Type	Description
topKeyExecFlag	bit	This item indicates that the executive occupies a top-level position, which could be: • Chief Executive Officer • Co-Chief Executive Officer • President • Co-President • Top Key Executive • Chief Financial Officer • Chief Operating Officer
boardFlag	bit	Flag to denote whether the person was ever on the board of this company.
advisorFlag	bit	If this flag is '1,' the *proFunction* describes a person in an advisory capacity.
graduateFlag	bit	*proFunction* with this flag indicates a graduate degree.
dealMakerFlag	bit	This denotes if the person is in a position to make investment banking type deals happen.
sponsorFlag	bit	*proFunctions* with this flag checked are associated with professionals at financial sponsors.
undergraduateFlag	bit	If this flag is '1,' the *proFunction* describes a position at an educational institution.
onlyOneFlag	bit	This means that this *proFunction* can only be assigned to one person at the given company.
companyFlag	int	If this flag is '1,' the *proFunction* describes a function that is used in a company, not an educational institution.
rank	tinyint	The rank of this *proFunction*. By ordering this column, you can rank employees in the company by their job function within the organization.
hideFlag	bit	Some professionals are not shown in the S&P Capital IQ Platform and this is achieved by hiding every person with *proFunctions* that have a hideFlag=1.
committeeId	tinyint	Identifier for the committee to which a professional may belong.

Table 8. Examples of professional functions by *proFunctionId* and *proFunctionName*

proFunctionId	proFunctionName
1	Chief Executive Officer
2	Co-Chief Executive Officer
3	President
4	Co-President
5	Top Key Executive
6	Chief Financial Officer
7	Chief Operating Officer
8	Unit CEO
9	Unit President
10	Senior Key Executive
Etc.	Etc.

Committee Table

The **Committee Table** is a reference table that provides a list of all committees to which professionals may belong.

ciqCommittee	
PK	**committeeId**
	committeeName

file: Committee.txt

Below you will find a description for each column in the Committee table.

Table 9. Committee table fields

Column Name	Data Type	Description
committeeId	tinyint	Identifier for the committee to which a professional may belong. For examples, see Table 10 below.
committeeName	varchar(100)	Name for the committee to which a professional may belong. For examples, see Table 10 below.

Table 10. Examples of committees by *committeeId* and *committeeName*

committeeId	committeeName
1	Asset Review/Asset Quality Committee
2	Asset-Liability Committee
3	Audit Committee
4	Budget/Planning Committee
5	Capital Projects/Capital Expenditures Committee
6	Committee on Directors
7	Compensation Committee
8	Conflicts/Related Transactions Committee
9	Control Committee
10	Corporate Disclosure Committee

Compensation Type Table

The **Compensation Type Table** provides information on the different types of compensation, e.g., cash, bonus, options.

ciqCompensationType	
PK	**compensationTypeId**
	compensationTypeName

file: CompensationType.txt

Below you will find a description for each column in the Compensation Type table.

Table 11. Compensation Type table fields

Column Name	Data Type	Description
compensationTypeId	int	Identifier for the type of the compensation. For examples, see Table 12 below.
compensationTypeName	varchar(150)	Description of the compensation type. For examples, see Table 12 below.

Table 12. Examples of compensation by *compensationTypeId* and *compensationTypeName*

compensationTypeId	compensationTypeName
1	Salary
2	Bonus
3	Other Annual Compensation
4	Restricted Stock Awards
5	Stock Grants
6	Stock Options
7	Long Term Incentive Plan
8	All Other Compensation
9	Exercised Options
10	Exercised Options Value
Etc.	Etc.

Person Professional Package Table Descriptions

Data Tables

Person Professional Table

The **Person Professional Table** delivers information on all the officers and directors for the companies in your universe. (A unique *proId* is the primary key and is used in other tables to relate to this record. The flags in the file reveal the type of relationship the person has with the company.)

ciqPersonProfessional	
PK	**proId**
	companyId firstName middleName lastName emailAddress title boardFlag currentBoardFlag educatedFlag boardRank currentEducatedFlag proFlag currentProFlag proRank prefix suffix salutation specialty yearBorn

file: PersonProfessional.txt

Below you will find a description for each column in the Person Professional table.

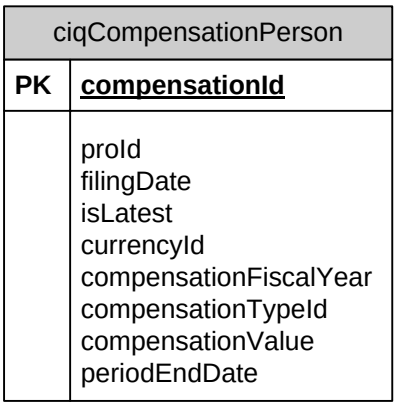
Table 13. Person Professional table fields

Column Name	Data Type	Description
proId	int	Unique identifier for a professional. A professional is the instance of a person being associated to a company (or educational institution, etc.).
companyId	int	Unique identifier for the company in the S&P Capital IQ data set to which the professional relates.
firstName	varchar(50)	First name of the person.
middleName	varchar(50)	Middle name of the person.
lastName	varchar(50)	Last name of the person.
emailAddress	varchar(100)	Email address for a professional.
title	varchar(500)	Professional's title at this organization.
boardFlag	bit	Flag to denote whether the person was ever on the board of this company.
currentBoardFlag	bit	Flag to denote whether the person is currently on the board of this company.
educatedFlag	bit	Flag to denote whether the person was educated at the educational institution indicated by the *companyId*.
boardRank	tinyint	The ranking of the professional on the board. Basically, the type of board members are ranked (e.g., chairman = 1) and then ordered.
currentEducatedFlag	bit	Flag to denote whether the person is currently a student at the educational institution indicated by the *companyId*.
proFlag	bit	Flag to denote whether the person ever worked at this company.
currentProFlag	bit	Flag to denote whether the person currently works at this company.
proRank	tinyint	Sort order (ranking) for the professional in the organization.
prefix	varchar(50)	Title used before a person's name, such as "Mr.," "Mrs.," "Ms.," "Dr.," etc.
suffix	varchar(50)	Designation used after a person's name, such as "Jr.," "Sr.," "Ph.D.," "I," "II," "III," etc.
salutation	varchar(50)	For some people, the name or nickname they prefer to be called.
specialty	varchar(200)	Specifically used for Private Equity professionals, this denotes the industry or other specialization they focus on.

Column Name	Data Type	Description
yearBorn	int	Year the professional was born.

Compensation Person Table

The **Compensation Person Table** delivers information on a Professional's compensation.



file: CompensationPerson.txt

Below you will find a description for each column in the Compensation Person table.

Table 14. Compensation Person table fields

Column Name	Data Type	Description
compensationId	int	Unique identifier for a compensation record.
proId	int	Unique identifier for a professional. A professional is the instance of a person being associated to a company (or educational institution, etc.).
filingDate	datetime	Date the SEC document describing this compensation was filed.
isLatest	integer	This column denotes if this row is the latest.
currencyId	tinyint	Unique identifier for a given currency.
compensationFiscalYear	int	Fiscal year for this record.
compensationTypeId	int	Identifier for the type of the compensation. For details, see Table 12.
compensationValue	decimal(18,4)	Value column for the compensation.
periodEndDate	datetime	The date on which the period ends.

Reference Tables

Compensation Type Table

The **Compensation Type Table** delivers information on the different types of compensation e.g., cash, bonus, and options.

ciqCompensationType	
PK	**compensationTypeId**
	compensationTypeName

file: CompensationType.txt

Below you will find a description for each column in the Compensation Type table.

Table 15. Compensation Type table fields

Column Name	Data Type	Description
compensationTypeId	int	Identifier for the type of the compensation (e.g., options, cash, etc.).
compensationTypeName	varchar(150)	Description of the compensation type (e.g., 1 = Salary; 2 = Bonus; 3 = Other Annual Compensation; etc.).

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People Basic Package Table Descriptions

Data Tables

Professional Basic Table

The **Professional Basic Table** relates a Person to a Company. The type of relationship between these two entities is then described by the *proFlag, boardFlag,* and other fields. (This table provides a portion of the data contained in the **ciqProfessional** table of the Professional data set.)

ciqProfessionalBasic	
PK	**proId**
	personId companyId title specialty proFlag boardFlag currentProFlag currentBoardFlag

file: ProfessionalBasic.txt

Below you will find a description for each column in the Professional Basic table.

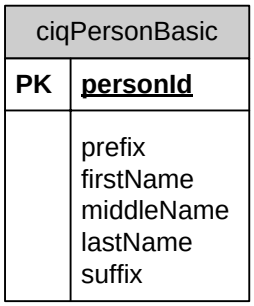
Table 16. Professional Basic table fields

Column Name	Data Type	Description
proId	int	Unique identifier for a professional. A professional is the instance of a person being associated to a company (or educational institution, etc.).

Column Name	Data Type	Description
personId	int	Unique identifier for every person in the S&P Capital IQ database.
companyId	int	Unique identifier for the company in the S&P Capital IQ data set to which the professional relates.
title	varchar(500)	Professional's title at this organization.
specialty	varchar(200)	Specifically used for Private Equity professionals, this denotes the industry or other specialization they focus on.
proFlag	bit	Flag to denote whether the person ever worked at this company.
boardFlag	bit	Flag to denote whether the person was ever on the board of this company.
currentProFlag	bit	Flag to denote whether the person currently works at this company.
currentBoardFlag	bit	Flag to denote whether the person is currently on the board of this company.

Person Basic Table

The **Person Basic Table** provides a unique identifier and the related basic information about every person in the S&P Capital IQ data set. (This table provides a portion of the data contained in the **ciqPerson** table of the Professional data set.)



file: Professional.txt

Below you will find a description for each column in the Person Basic table.

Table 17. Person Basic table fields

Column Name	Data Type	Description
personId	int	Unique identifier for every person in the S&P Capital IQ database.
prefix	varchar(50)	Title used before a person's name, such as "Mr.," "Mrs.," "Ms.," "Dr.," etc.
firstName	varchar(50)	First name of the person.
middleName	varchar(50)	Middle name of the person.
lastName	varchar(50)	Last name of the person.
suffix	varchar(50)	Designation used after a person's name, such as "Jr.," "Sr.," "Ph.D.," "I," "II," "III," etc.

Pro To Pro Function Table (Professional To Professional Function Table)

The **Pro To Pro Function Table** provides information that relates a professional to the job functions the professional performs (e.g., Bill Gates related to Chairman of Microsoft).

ciqProToProFunction	
PK	**proToProFunctionId**
	proId proFunctionId currentFlag startDay startMonth startYear endDay endMonth endYear proFunctionSpecialty

file: ProToProFunction.txt

Below you will find a description for each column in the Pro To Pro Function table.

Table 18. Pro To Pro Function table fields

Column Name	Data Type	Description
proToProFunctionId	int	Unique identifier for the professional and the job functions the professional performs.
proId	int	Unique identifier for a professional. A professional is the instance of a person being associated to a company (or educational institution, etc.).
proFunctionId	int	This is the identifier of a given *proFunction*. A *proFunction* is a standardized way to describe titles across different firms.
currentFlag	bit	Denotes whether relationships of this type are current.
startDay	int	Start day of this record.
startMonth	int	Start month of this record.
startYear	int	Start year of this record.
endDay	int	End day of this record.
endMonth	int	End month of this record.
endYear	int	End year of this record.

Column Name	Data Type	Description
proFunctionSpecialty	varchar(100)	Specifically used for Private Equity professionals, this denotes the industry or other specialization they focus on.

Reference Tables

Pro Function Basic Table

The **Pro Function Basic Table** contains reference data describing the basic job functions of professionals. A job function is a normalized version of a title in order to enable aggregation across companies that have different titles, but the same job functions. (The data in this table is a portion of the data contained in the **ciqProFunction** table of the Professional data set.)

ciqProFunctionBasic	
PK	**proFunctionId**
	proFunctionName keyExecFlag topKeyExecFlag boardPositionFlag advisorFlag committeeId

file: ProFunctionBasic.txt

Below you will find a description for each column in the Pro Function Basic table.

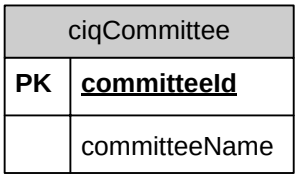
Table 19. Pro Function Basic table fields

Column Name	Data Type	Description
proFunctionId	int	This is the identifier of a given professional function (*proFunction*). (A *proFunction* is a standardized way to describe titles across different firms.)
proFunctionName	varchar(100)	The descriptive value of the *proFunctionId*. Examples of *profunctionIds* and their *profunctionNames*: 1 = Chief Executive Officer 2 = Co-Chief Executive Officer 3 = President
keyExecFlag	bit	If this *proFunction* is one that denotes a Key Executive of a company, this field will have a ‘1.’

Column Name	Data Type	Description
topKeyExecFlag	bit	This item indicates that the executive occupies a top-level position, which could be: • Chief Executive Officer • Co-Chief Executive Officer • President • Co-President • Top Key Executive • Chief Financial Officer • Chief Operating Officer
boardPositionFlag	bit	Flag to denote whether the person was ever on the board of this company.
advisorFlag	bit	If this flag is '1,' the *proFunction* describes a person in an advisory capacity.
committeeId	tinyint	Identifier for the committee to which a professional may belong.

Committee Table

The **Committee Table** delivers is a reference table that provides a list of all committees to which professionals may belong.



file: Committee.txt

Below you will find a description for each column in the Committee table.

Table 20. Committee table fields

Column Name	Data Type	Description
committeeId	tinyint	Identifier for the committee to which a professional may belong.
committeeName	varchar(100)	Name for the committee to which a professional may belong. Examples of *committeeIds* and their *committeeNames:* 1 = Asset Review/Asset Quality Committee 2 = Asset-Liability Committee 3 = Audit Committee

Compensation Detail Package Table Descriptions

Data Tables

Compensation Detail Table

The **Compensation Detail Table** provides compensation details for the executives of public companies.

ciqCompensationDetail	
PK	**compensationDetailId**
	proId compensationFiscalYear compensationSubTypeSequence compensationSubTypeId compensationDetailValue accessionNumber filingDate relativeConstant

file: CompensationDetail.txt

Below you will find a description for each column in the Compensation Detail table.

Table 21. Compensation Detail table fields

Column Name	Data Type	Description
compensationDetailId	integer	Unique identifier for a compensation detail record.
proId	integer	Unique identifier for a professional. A professional is the instance of a person being associated to a company, educational institution, etc.

Column Name	Data Type	Description
compensationFiscalYear	tinyint	Fiscal year for this record.
compensationSubTypeSequence	integer	This item groups values that were reported together.
compensationSubTypeId	tinyint	Identifier for the sub type of the compensation (e.g., 1 = No. of Options; 2 = Exercise Price; etc.).
compensationDetailValue	varchar(8000)	Value column for the compensation detail.
accessionNumber	varchar(500)	This is the unique number identifying the filing, given by the SEC at the time of collection. The accession number can be linked to **ciqKeyDocument** or **ciqFinInstance** tables for more details about the specific document.
filingDate	datetime	Date the SEC document describing this compensation was filed.
relativeConstant	tinyint	This item aligns current and historical periods. The current period is assigned a base integer—1000—and each historical period sequentially decreases the base integer by 1.

Compensation Adjustment Table

The **Compensation Adjustment Table** provides information on compensation adjustments for executives of public companies.

ciqCompensationAdjustment	
PK	**compensationAdjustmentId**
	proId fiscalYear compensationAdjustmentTypeId compensationAdjustmentValue adjustmentComment accessionNumber compensationTypeId

file: CompensationAdjustment.txt

Below you will find a description for each column in the Compensation Adjustment table.

Table 22. Compensation Adjustment table fields

Column Name	Data Type	Description
compensationAdjustmentId	integer	Unique identifier for a compensation adjustment record.
proId	integer	Unique identifier for a professional. A professional is the instance of a person being associated to a company, educational institution, etc.
fiscalYear	tinyint	Fiscal year for this row.
compensationAdjustmentTypeId	tinyint	Identifier for the type of the compensation adjustment.
compensationAdjustmentValue	decimal(18,4)	Value column for the compensation adjustment.
adjustmentComment	varchar(2000)	Textual information on the compensation adjustment (e.g., Additional Compensation Paid, Paid as a Director, Director's Fee, Paid to the Foundation, etc.).
accessionNumber	varchar(500)	This is the unique number identifying the filing, given by the SEC at the time of collection. The accession number can be linked to **ciqKeyDocument** or **ciqFinInstance** tables for more details about the specific document.
compensationTypeId	integer	Identifier for the type of the compensation. For details, see Table 12.

Reference Tables

Compensation Sub Type Table

The **Compensation Sub Type Table** provides information on the components of an executive's compensation.

ciqCompensationSubType	
PK	**compensationSubTypeId**
	compensationSubTypeName compensationTypeId compensationBlockId

file: CompensationSubType.txt

Below you will find a description for each column in the Compensation Sub Type table.

Table 23. Compensation Sub Type table fields

Column Name	Data Type	Description
compensationSubTypeId	tinyint	Identifier for the sub type of the compensation (e.g., 1 = No. of Options; 2 = Exercise Price; etc.).
compensationSubTypeName	varchar(100)	Name of every compensation subtype comprising an executive's compensation.
compensationTypeId	integer	Identifier for the type of the compensation. For details, see Table 12.
compensationBlockId	tinyint	Identifier used internally to define the relationship between the data items and blocks of data.

Compensation Adjustment Type Table

The **Compensation Adjustment Type Table** provides information on the types of adjustments made to an executive's compensation.

ciqCompensationAdjustmentType	
PK	**compensationAdjustmentTypeId**
	compensationAdjustmentTypeName adjustmentNegativeFlag

file: CompensationAdjustmentType.txt

Below you will find a description for each column in the Compensation Adjustment Type table.

Table 24. Compensation Adjustment Type table fields

Column Name	Data Type	Description
compensationAdjustmentTypeId	tinyint	Identifier for the type of the compensation adjustment
compensationAdjustmentTypeName	varchar(500)	Name for the type of the compensation adjustment
adjustmentNegativeFlag	bit	A flag to indicate the nature of the negative compensation adjustment.

Table 25. Compensation Adjustment by *compensationAdjustmentType*, *compensationAdjustmentTypeName*, and *adjustmentNegativeFlag*

compensationAdjustmentTypeId	compensationAdjustmentTypeName	adjustmentNegativeFlag
1	Duplication - Positive	0
2	Duplication - Negative	1
3	Prev. Year - Positive	0
4	Prev. Year - Negative	1

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Appendix A: Sample Query Solutions

This section provides sample queries and solutions for S&P Capital IQ Professional data set. All sample queries use Microsoft® SQL Server™ script.

Note: Sample queries are provided in order to demonstrate table relationships and business rules. Please feel free to optimize the queries for best performance based on your use case.

Sample query 1

Display a person's profile with biography, education, and board memberships

```
select
per.prefix as PrefixName,
per.firstName as FirstName,
per.middleName as MiddleName,
per.lastName as LastName,
per.emailAddress as EmailAddress,
per.suffix as SuffixName,
per.salutation as Salutation,
b.biography as PersonBiography,
pro.currentBoardFlag as BoardMember,
pro.boardRank as BoardRank,
f.graduateFlag as DegreeFlag
from ciqProfessional pro inner join ciqPerson per on pro.personId = per.personId
inner join ciqPersonBiography b on b.personId = per.personId
inner join ciqProToProFunction ptpf on ptpf.proId = pro.proId
inner join ciqProFunction f on f.proFunctionId = ptpf.proFunctionId
where pro.proId = 595452
```

View the results[1]

Prefix Name	First Name	Middle Name	Last Name	Email Address	Suffix Name	Salutation	PersonBiography	Board Member	Board Rank	Degree Flag
Mr.	Kenneth	I.	Chenault	NULL	NULL	Ken	Mr. Kenneth I. Chenault, Ken has been the Chief Executive Officer of American Express Company since January 2001 and its subsidiary, American Express Travel Related Services Company Inc. since February 1997. Mr. Chenault joined American Express in September 1981 and served as President of the U.S.A division of American Express Travel Related Services Company, Inc. since 1993. He served as President and Chief Operating Officer of American Express Co. from February 1997 to January 2001. He held several senior management positions at Bain & Co. He has been Chairman of American Express Company since April 2001 and American Express Travel Related Services Company Inc., (TRS), since April 2001. He serves as Vice Chairman and Director of Phoenix House Foundation, Inc. He serves as Vice Chairman of National Academy Foundation. He served as Vice Chairman of American Express Company from January 1995 to February 1997. He has been a Director of Procter & Gamble Co. since April 21, 2008…	1	5	0

[1] Partial presentation of results

Sample query 2

Identify current board members for IBM

```
select pro.companyId,
pro.title,
pro.boardRank,
per.prefix,
per.firstName,
per.middleName,
per.lastName,
per.suffix,
per.salutation,
per.emailAddress
from ciqProfessional pro inner join ciqPerson per on pro.personId = per.personId
where pro.companyId = 112350 -- IBM
and pro.boardFlag = 1
and pro.boardRank is not NULL
order by pro.boardRank
```

View the results

companyId	title	boardRank	prefix	firstName	middleName	lastName	suffix	salutation	Email Address
112350	Executive Chairman, Chief Executive Officer, President and Chairman of Executive Committee	1	Mr.	Samuel	J.	Palmisano	NULL	NULL	NULL
112350	Director, Chairman of Executive Compensation & Management Resources Committee and Member of Executive Committee	2	Mr.	Sidney	NULL	Taurel	NULL	NULL	NULL
112350	Director, Chairman of Directors & Corporate Governance Committee and Member of Executive Committee	3	Mr.	Lorenzo	H.	Zambrano	NULL	NULL	NULL
112350	Director, Chairman of Audit Committee and Member of Executive Committee	4	Mr.	Michael	L.	Eskew	NULL	NULL	NULL
112350	Director	5	Mr.	Kenneth	I.	Chenault	NULL	Ken	NULL

companyId	title	boardRank	prefix	firstName	middleName	lastName	suffix	salutation	Email Address
112350	Director and Member of Audit Committee	6	Ms.	Joan	E.	Spero	NULL	NULL	NULL
112350	Director and Member of Directors & Corporate Governance Committee	7	Dr.	Shirley	Ann	Jackson	Ph.d.	NULL	NULL
112350	Director and Member of Audit Committee	8	Mr.	James	W.	Owens	NULL	Jim	NULL
112350	Director and Member of Directors & Corporate Governance Committee	9	Prof.	William	R.	Brody	M.D., Ph.D.	NULL	wrbrody@salk.edu
112350	Director and Member of Executive Compensation & Management Resources Committee	10	Mr.	Alain	J. P.	Belda	NULL	NULL	NULL

Sample query 3

Identify prior executives found at IBM

```
select pro.companyId,
pro.title "Title",
pro.boardRank "Rank",
per.firstName "First Name",
per.lastName "Last Name",
per.middleName "MI",
per.emailAddress "Email",
per.prefix "Prefix",
per.suffix "Suffix",
per.salutation "Saluation"
from ciqProfessional pro inner join ciqPerson per on pro.personId = per.personId
where exists
        (
                select 'a' from ciqProToProFunction ptpf inner join ciqProFunction pf on ptpf.proFunctionId = pf.proFunctionId
                where pf.keyExecFlag = 1 and ptpf.proId = pro.proId
        )
and pro.companyId = 112350
and pro.proFlag = 0
order by pro.proId
```

View the results

companyId	Title	Rank	First Name	Last Name	MI	Email	Prefix	Suffix	Salutation
112350	Former Chairman	NULL	Louis	Gerstner	V.	NULL	Mr.	Jr.	Lou
112350	Former Vice Chairman	NULL	John	Thompson	M.	NULL	Mr.	NULL	NULL

Sample query 4

Identify the key executives with the highest annual cash compensation between 01/01/2010 and 12/31/2010

```
select top(20)  cast(a.compensationValue/f.currencyRateClose as int) [Total Annual Cash Compensation in USD],
lastname,
firstname,
title,
d.companyName
from ciqCompensation a
join ciqProfessional b on b.proid = a.proId
join ciqPerson c on c.personId = b.personId
join ciqCompany d on d.companyId = b.companyId
join ciqCurrency e on e.currencyId = a.currencyId
join ciqExchangeRate f on f.currencyId = e.currencyId
where a.periodEndDate between '2010-01-01' and '2010-12-31'
and a.compensationTypeId = '15'
and f.pricingdate = a.periodEndDate
and a.compensationValue > 0
order by a.compensationValue/f.currencyRateClose desc,a.compensationValue desc
```

View the results

Total Annual Cash Compensation in USD	lastName	firstName	title	companyName
617520	Magnasco	Reinaldo	President	S.A.C.I. Falabella
448151	Solari	Juan Cuneo	Chairman	S.A.C.I. Falabella
239948	Buchi Buc	Hernán	Independent Director and Chairman of Audit Committee	S.A.C.I. Falabella
238955	Cardone Solari	Sergio	Director and Member of Audit Committee	S.A.C.I. Falabella
228802	Moreno Charme	Alfredo	Former Director	S.A.C.I. Falabella
181437	del Río Goudie	José Luis	Director and Member of Audit Committee	S.A.C.I. Falabella
181437	Heller Solari	Carlos Alberto	Director	S.A.C.I. Falabella
181437	Karlezi Solari	Maria Cecilia	Director	S.A.C.I. Falabella
181437	Cortés Solari	Juan Carlos	Director	S.A.C.I. Falabella
9150	Arellano Marin	Jose Pablo	Former Director and Member of Audit Committee	United Company RUSAL Plc

Revision History

Revision History

The changes to this document include the following:

Table 26. Revision history

Document Version	Date	Changes
1.0	07/12/2012	Initial version
1.1	03/01/2013	Adopted single contact email address
1.2	06/04/2014	Corrected results for sample query #4
1.3	02/10/2016	• Added board relationship criteria to sample query #1 • Updated reference to *countryId* to say that "*countryId* maps to the **refCountryGeo**" table. • Minor punctuation update • **ciqPersonBiography** table is PersonBiography.txt file
1.4	03/30/2016	• Revised the description for the *topKeyExecFlag* field. • Added the *topKeyExecFlag* field in the **ciqProFunctionBasic** table in the People Basic database schema.
1.5	05/04/2017	• Revised the descriptions for the *educatedFlag* and *currentEducatedFlag* fields.

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