

Student guide for Capital IQ Account Registration

About S&P Capital IQ - Capital IQ platform is a Web and Excel-based research product that combines deep information on companies, markets and people worldwide with robust tools for fundamental analysis, idea generation and workflow management. S&P Capital IQ is deployed at more than 2,700 leading investment banks, fund managers, private capital firms and corporations worldwide.

Capital IQ is remotely accessible but for that you need to follow the steps listed below.

1. Visit the Trading Lab located at JSOM 11.101 during working hours.
2. The working hours of the Trading Lab are listed at this webpage:
<http://jindal.utdallas.edu/student-resources/finance-trading-lab/#03-location-and-hours>
3. Locate the on-duty student worker in the trading lab.
4. Show your comet card to the student worker and ask him/her to help you with Capital IQ account registration.
5. Student worker will ask you to fill following details in the Capital IQ account registration file: First name, Last name, UTD ID, Grad/Undergrad, Expected Grad date, UTD e-mail, Application date.
Please input **Expected Graduation date** in the column titled **Expected Grad date**. For example, if you plan on graduating in Spring 2018 enter 12-May-2018 which is the 'Degree conferral date' listed in the academic calendar for Spring 2018. In addition, input **official university email address** in the field meant for UTD e-mail field in the excel sheet.
6. In case of any doubts/queries please consult with the student worker.
7. IDs are submitted for processing every Friday noon and turnaround time is about 7 business days. The turnaround time can at times be higher.
8. Cap IQ may or may not send a confirmation email once they create an account for you. If you do receive an email from them, however, then please follow the instructions included in the email.
9. If you have not received a confirmation email then the way to check whether your Cap IQ account has been generated is by visiting the Capital IQ login page (<https://www.capitaliq.com>) after 7-10 business days. On this webpage click on 'Forgot Password' link to reset your password. On the following page student should enter his/her **university email address** in the username field and click on '**Submit**' button.
If the Cap IQ account has been generated, then the student will receive an email in the account associated with his/her **university email address**. The email will include instructions to reset the password. If you do not receive an email from Cap IQ then your account is most likely not yet been created. However, if you do receive an email, follow the instructions in the email and reset your password.
10. Immediately after resetting the password, students are advised to visit the Capital IQ login page (<https://www.capitaliq.com>) and login to the portal with the **university email address** and the **new password**.
11. If the student is unable to login to the portal after resetting the password, he/she is requested to visit the trading lab and talk to the on-duty student worker.
12. If you want to check if you already have an active Cap IQ account then you should go to Capital IQ login page (<https://www.capitaliq.com>) and click on 'forgot password' link. On the

following page, you should enter your official **university email address** in the username field and click on 'Submit' button. If you receive an email from Cap IQ as a result of this then your Cap IQ account is active. You should follow the instructions in the email and reset the password.

13. If you have any issues or concerns related to generating Capital IQ account, you are requested to forward your query to (1) clientsupport@spcapitaliq.com; (2) follow the instructions for support/help on their main webpage at: <https://www.capitaliq.com> A visit to the trading lab and talk with the on-duty student worker may also help.