

How to Import Data into Excel from EDGAR

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ABSTRACT

In this paper, we demonstrate how to download data from EDGAR into a spreadsheet. There are four steps in the process. First, the analyst must open a spreadsheet. Second, the analyst must locate the data for the company on EDGAR. Third, the analyst must find the Form 10-K and fourth, the analyst must import the data into the spreadsheet. This paper provides a detailed demonstration of this process that can be used in the classroom.

INTRODUCTION

In this paper, we demonstrate how to import a nested table from a web page from the Form 10-K filings to the SEC using the EDGAR database. Step 1 begins with Screen 1 that shows how to begin by opening a spreadsheet and clicking on cell A1. Screen 2 shows how to go to the Data tab and click on Get External Data from the web and the web browser will open.

Step 2 is to search for a company within EDGAR. Copy the EDGAR address in the address bar: www.sec.gov/edgar.shtml. Click Go and then click on Search for Company Filings. Click Company or fund name, ticker symbol, CIK (Central Index Key), file number, state, county, or SIC (Standard Industrial Classification). Type in the Company or fund name, ticker symbol, CIK, file number, state county, or SIC in the appropriate field and click "Find Companies."

Step 3 shows how to find the SEC form 10-K that will be imported into a spreadsheet. In this example, we use the Form 10-K but this process will work for any SEC form with a nested table. We will import the consolidated income statements, consolidated balance sheets, and the consolidated statements of cash flows. Filter results to filing type 10-K and click Search. Click the documents hyperlink for Form 10-K for the desired year. Select hyperlink for 10-K or complete the submission text file. Select Table of Contents hyperlink if available if not go to Step F. Select the hyperlink for financial statements. Select the hyperlink for the consolidated income statement. If there is no Table of Contents, select hyperlink for 10-k or complete submission text file. Use the Find function by holding down CTRL+F on keyboard. Enter "Consolidated Statements of Income" in Find box and select next until data is found.

How to Import Data into Excel from EDGAR

Step 4 shows how to import data into a spreadsheet. Once the data table has been located you will notice a yellow box with a black arrow. Click the yellow box with a black arrow above the table to select the table (the box should change into a green box with a check mark to indicate it has been selected). Click Import. Click OK to import into Excel. Data is now imported into worksheet.

1. **Open new Excel workbook**

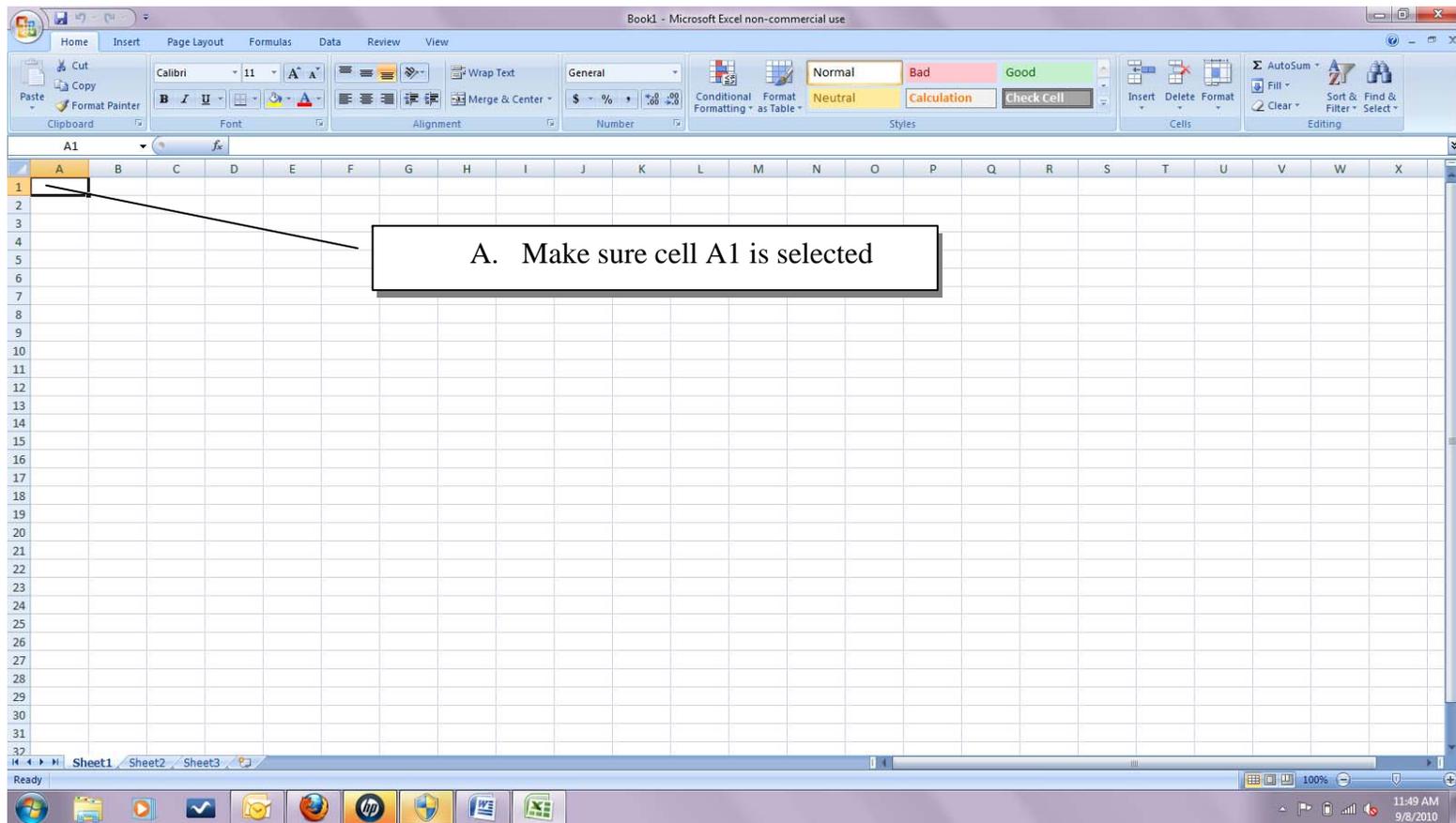
- A. Make sure cell A1 is selected
- B. Go to Data tab
- C. On Data tab select Get External Data from web
- D. Web browser will open

How to Import Data into Excel from EDGAR

2. Open new Excel workbook

- A. Make sure cell A1 is selected
- B. Go to Data tab
- C. On Data tab select Get External Data from web
- D. Web browser will open

How to Import Data into Excel from EDGAR



How to Import Data into Excel from EDGAR

The image shows a screenshot of Microsoft Excel with the Data tab selected. A callout box points to the 'Get External Data from web' button in the ribbon, with the text: 'B. Go to Data tab' and 'C. On Data tab select Get External Data from web'. Another callout box points to the 'New Web Query' dialog box, with the text: 'D. Web browser will open'. The dialog box shows the address 'http://www.sec.gov/Archives/edgar/data/21344' and the Google logo. The status bar at the bottom indicates the time is 12:03 PM on 9/8/2010.

B. Go to Data tab

C. On Data tab select Get External Data from web

D. Web browser will open

How to Import Data into Excel from EDGAR

3. Search for company within EDGAR

- A. In web browser address bar type ” www.sec.gov/edgar.shtml ”
- B. *Click Go.*
- C. Click Search for Company Filings.
- D. Click Company or fund name, ticker symbol, CIK(Central Index Key), file number, state, county, or SIC (Standard Industrial Classification).
- E. Enter Company or fund name, ticker symbol, CIK, file number, state county, or SIC in appropriate field and click “Find Companies”.

How to Import Data into Excel from EDGAR

The screenshot shows a Mozilla Firefox browser window displaying the SEC EDGAR website. The browser's address bar shows the URL <http://www.sec.gov/edgar.shtml>. The page title is "Filings & Forms - Mozilla Firefox". The website header includes the SEC logo and the text "U.S. Securities and Exchange Commission". The main content area is titled "Filings & Forms" and contains a paragraph explaining that all companies are required to file registration statements, periodic reports, and other forms electronically through EDGAR. Below this paragraph is a list of links, including "Quick EDGAR Tutorial", "Search for Company Filings", "EDGAR Public Dissemination Service (PDS)", "Descriptions of SEC Forms", "SEC Forms List (PDF versions)", "About EDGAR", "Search EDGAR Comment Letters", "Requesting Public Documents", "Filings: Preview Interactive Data Submissions", "FTP Users", "Indices", "SIC Codes", and "Information for EDGAR Filers". A callout box with a black border and white background points to the "Search for Company Filings" link, containing the text "B. Click 'Search for Company Filings'". The browser's status bar at the bottom shows the system time as 11:51 AM on 9/8/2010.

How to Import Data into Excel from EDGAR

F.

Next-Generation EDGAR system - Better Data. Stronger Markets. - Mozilla Firefox

File Edit View History Bookmarks Yahoo! Tools Help

http://www.sec.gov/edgar/searchedgar/webusers.htm

Most Visited Getting Started Latest Headlines Job Site

WEB SEARCH

Next-Generation EDGAR system - B

Home | Latest Filings | Previous Page

U.S. Securities and Exchange Commission

Search Home

Search the Next-Generation EDGAR System

SEC Home » Current Page

Note: EDGAR Search Changes (see below)

Since 1934, the SEC has required disclosure in forms and documents. In 1984, EDGAR began collecting electronic documents to help investors get information. The SEC's new system requires data disclosure — the next step to improve how investors find and use information.

You can search information collected by the SEC several ways:

- **Company or fund name, ticker symbol, CIK (Central Index Key), file number, state, county, or SIC (Standard Industrial Classification)**
- Most recent filings
- Full text (past four years)
- Boolean and advanced searching, including addresses
- Key mutual fund disclosures
- Mutual fund voting records
- Mutual fund name, ticker, or SEC key (since Feb. 2006)
- Variable insurance products (since Feb. 2006)

Custom searches:

- Confidential treatment orders
- Effectiveness notices
- SEC Central Index Key (CIK)
- Daily filings

Other Resources

- Researching Public Companies Through EDGAR: A Guide for Investors

Sign up for RSS Feeds

http://www.sec.gov/edgar/searchedgar/webusers.htm

Home | Previous Page

Modified: 02/11/2010

http://www.sec.gov/edgar/searchedgar/companysearch.html

11:53 AM 9/8/2010

C. Click Company or fund name, ticker symbol, CIK(Central Index Key), file number, state, county, or SIC (Standard Industrial Classification).

How to Import Data into Excel from EDGAR

The screenshot shows the SEC Edgar Company Search page in a Mozilla Firefox browser window. The browser's address bar shows the URL <http://www.sec.gov/edgar/searchedgar/companysearch.html>. The page features the SEC logo and the text "Company Search". A callout box with a black border and white background is positioned over the search form, containing the text: "D. Enter Company or fund name, ticker symbol, CIK, file number, state county, or SIC in appropriate field and click 'Find Companies'". The search form includes fields for "Company name:", "or CIK or Ticker Symbol:" (with "KO" entered), "or File Number:", "State:", "Country:", and "and/or SIC:". There are also radio buttons for "Include", "Exclude", and "Only". A "Find Companies" button is at the bottom of the form. To the right of the form is a "Helpful Information" section with two bullet points. The browser's taskbar at the bottom shows various icons and the system clock displaying "11:54 AM 9/8/2010".

D. Enter Company or fund name, ticker symbol, CIK, file number, state county, or SIC in appropriate field and click "Find Companies"

SEC Home » Search the Next-Generation EDGAR System » Current Page

Note: EDGAR Search Changes (see below)

From this page you can search for company information. Company filings are available starting in 1994. See also [full text search](#).

Enter your search information.

Company name:

Starts with Contains

or CIK or Ticker Symbol:
 publicly traded companies

or File Number:

State:

Country:

and/or SIC:

and Ownership Forms 3, 4, and 5. Include Exclude Only

Helpful Information

- If your search is "John Smith" and you didn't get the results you expected, please try "Smith John."
- The SEC does not require companies that are raising less than \$1 million under [Rule 504 of Regulation D](#) to be "registered" with the SEC, but these companies are required to file a [Form D](#) with the SEC. The Form D serves as a brief notice that provides information about the company and the offering.

<http://www.sec.gov/edgar/searchedgar/companysearch.html>

Done

11:54 AM 9/8/2010

How to Import Data into Excel from EDGAR

In the next step we explain how to find the SEC form that will be imported into Excel. For our example we use form 10-k but this process will work for any SEC form with a nested table. We will be importing the consolidated income statements, consolidated balance sheets and the consolidated statements of cash flows.

4. Find the SEC form to import

- A. Filter Results to filing type 10-K and click Search
- B. Click the documents hyperlink for form 10-K for desired year
- C. Select hyperlink for 10-K or complete submission text file
- D. Select Table of Contents hyperlink if available if not go to Step F
- E. Select hyperlink for financial statements
- F. Select hyperlink for consolidated income statement
- G. If there is no Table of Contents
- H. Select hyperlink for 10-K or complete submission text file
- I. Use Find function by holding down CTRL+F on keyboard
- J. Enter “Consolidated Statements of Income” in Find box and select next until data is found

How to Import Data into Excel from EDGAR

The screenshot shows the EDGAR search results for COCA COLA CO. The browser address bar shows the URL: <http://www.sec.gov/cgi-bin/browse-edgar?action=getcompany&CIK=0000021344&type=10-k&dateb=&owner=exclude&count=40>. The page title is "Search Results - Mozilla Firefox".

A. Filter results to filing type 10-K and click Search

B. Click hyperlink for form 10-K for desired year.

COCA COLA CO CIK#: 0000021344 (see all company filings)

SIC: 2080 - BEVERAGES
State location: GA | State of Inc: DE | Fiscal Year End: 0417
(Assistant Director Office No 9)
Get [insider transactions](#) for this issuer.
Get [insider transactions](#) for this reporting owner.

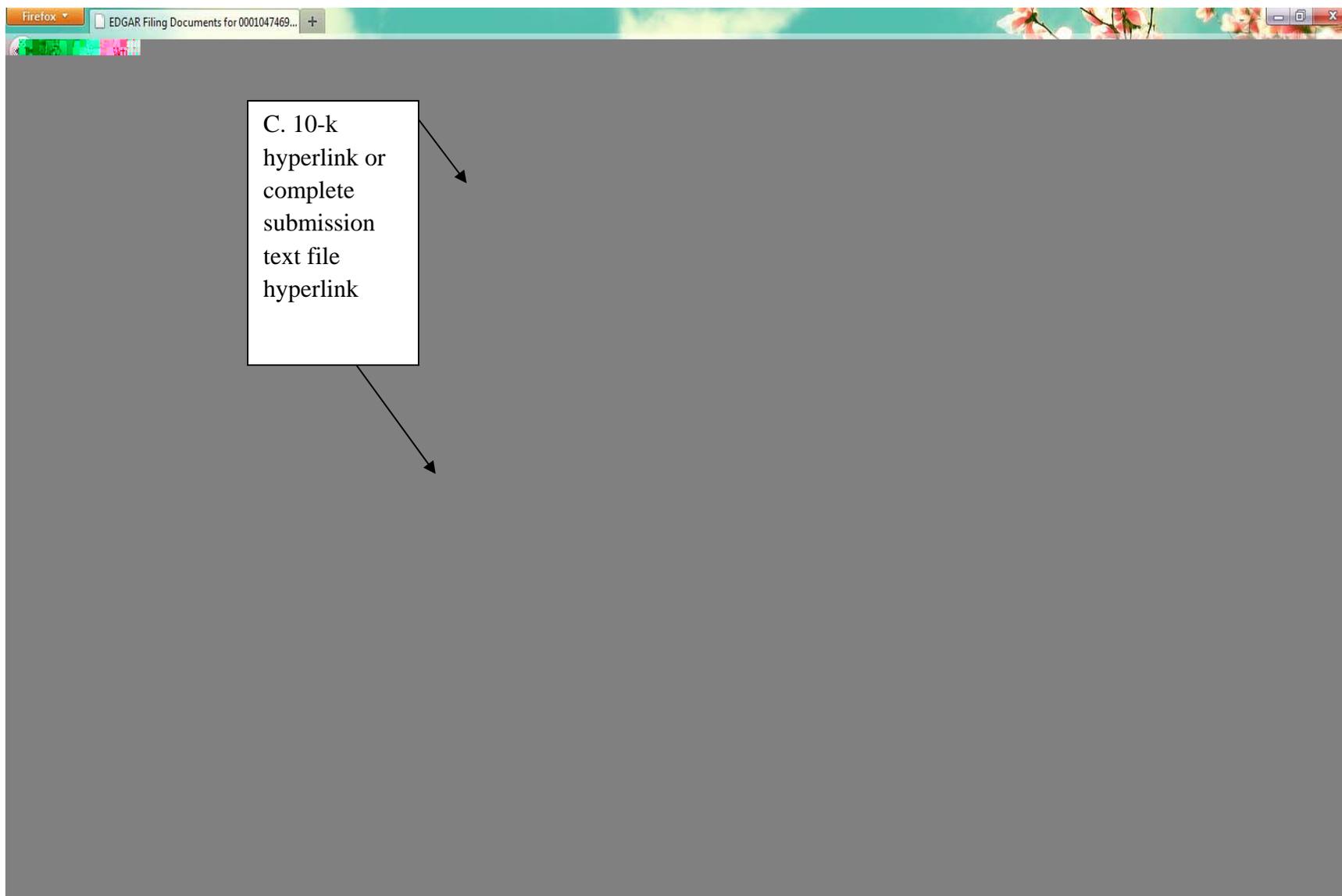
Business Address
ONE COCA COLA PLAZA
ATLANTA GA 30313
404-676-2121

Mailing Address
ONE COCA COLA PLAZA
ATLANTA GA 30313
404-676-2121

Filter Results: Filing Type: Prior to: (YYYYMMDD)
Limit Results Per Page: 40 Entries

Filings	Format	Description	Filing Date	File/Film Number
10-K	Documents Interactive Data	Annual report [Section 13 and 15(d), not S-K Item 405] Acc-no: 0001047469-10-001476 (34 Act) Size: 6 MB	2010-02-26	001-02217 10636366
10-K	Documents	Annual report [Section 13 and 15(d), not S-K Item 405] Acc-no: 0001047469-09-001875 (34 Act) Size: 2 MB	2009-02-26	001-02217 09637277
10-K	Documents	Annual report [Section 13 and 15(d), not S-K Item 405] Acc-no: 0001193125-08-041768 (34 Act) Size: 2 MB	2008-02-28	001-02217 08650795
10-K	Documents	Annual report [Section 13 and 15(d), not S-K Item 405] Acc-no: 0001047469-07-001328 (34 Act) Size: 1 MB	2007-02-21	001-02217 07638901
10-K	Documents	Annual report [Section 13 and 15(d), not S-K Item 405] Acc-no: 0001047469-06-002588 (34 Act) Size: 1 MB	2006-02-28	001-02217 06649943
10-K	Documents	Annual report [Section 13 and 15(d), not S-K Item 405] Acc-no: 0001047469-05-005411 (34 Act) Size: 1 MB	2005-03-04	001-02217 05660550
10-K	Documents	Annual report [Section 13 and 15(d), not S-K Item 405] Acc-no: 0001047469-04-005840 Size: 1 MB	2004-02-27	001-02217 04632708

How to Import Data into Excel from EDGAR



How to Import Data into Excel from EDGAR

Firefox | http://www.sec.gov.../a2190274z10-k.htm

http://www.sec.gov/Archives/edgar/data/21344/000104746909001875/a2190274z10-k.htm

Most Visited | Getting Started | Latest Headlines | Job Site

10-K 1 a2190274z10-k.htm 10-K

Use these links to rapidly review the document
[Table of Contents](#)
[ITEM 8. FINANCIAL STATEMENTS AND SUPPLEMENTARY DATA](#)

D. Select Table of Contents hyperlink if available if not go to Step G

**UNITED STATES
SECURITIES AND EXCHANGE COMMISSION**
Washington, D.C. 20549

FORM 10-K

ANNUAL REPORT PURSUANT TO SECTION 13 OR 15(d) OF THE SECURITIES EXCHANGE ACT OF 1934

For the fiscal year ended December 31, 2008

OR

TRANSITION REPORT PURSUANT TO SECTION 13 OR 15(d) OF THE SECURITIES EXCHANGE ACT OF 1934

For the transition period from _____ to _____
Commission File No. 1-2217

The Coca-Cola Company

(Exact name of Registrant as specified in its charter)

DELAWARE
(State or other jurisdiction of incorporation or organization)

One Coca-Cola Plaza
Atlanta, Georgia
(Address of principal executive offices)

58-0628465
(IRS Employer Identification No.)

30313
(Zip Code)

9:24 AM
3/29/2011

How to Import Data into Excel from EDGAR

The screenshot shows a Firefox browser window with the following address bar text: `http://www.sec.gov/Archives/edgar/data/21344/000104746909001875/a2190274z10-k.htm#bg74201_table_of_contents`. The page title is "Table of Contents". The table of contents lists various sections and their corresponding page numbers. A callout box on the left contains the text "E. Select hyperlink for financial statements" with an arrow pointing to the "Financial Statements and Supplementary Data" link in the table of contents.

	<u>Page</u>
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Part I	
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F. Select hyperlink for consolidated income statement

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THE COCA-COLA COMPANY AND SUBSIDIARIES
CONSOLIDATED STATEMENTS OF INCOME

Year Ended December 31,

	2008	2007	2006
(In millions except per share data)			
NET OPERATING REVENUES	\$ 31,944	\$ 28,857	\$ 24,088
Cost of goods sold	11,374	10,406	8,164
GROSS PROFIT	20,570	18,451	15,924
Selling, general and administrative expenses	11,774	10,945	9,431
Other operating charges	350	254	185
OPERATING INCOME	8,446	7,252	6,308
Interest income	333	236	193
Interest expense	438	456	220
Equity income (loss) — net	(874)	668	102
Other income (loss) — net	(28)	173	195

How to Import Data into Excel from EDGAR

Filing Detail

SEC Accession No. 0000021344-01-000005

Document Format Files

Seq	Description	Document	Type	Size
1		0001.bt	10-K	114045
2	EXECUTIVE INCENTIVE PLAN, ADOPTED ON FEBRUARY 14, 2001	0002.bt	EX-10.19	14195
3	RESTRICTED STOCK AGREEMENT, DATED DECEMBER 20, 2001,	0003.bt	EX-10.20	10973
4	RATIOS OF EARNINGS TO FIXED CHARGES	0004.bt	EX-12.1	2499
5	PORTIONS OF 2000 ANNUAL REPORT	0005.bt	EX-13.1	231253
6	LIST OF SUBSIDIARIES	0006.bt	EX-21.1	8227
7	CONSENT OF AUDITORS	0007.bt	EX-23.1	2351
8	POWERS OF ATTORNEY	0008.bt	EX-24.1	20235
9	CAUTIONARY STATEMENT	0009.bt	EX-99.1	5125
	Complete submission text file	0000021344-01-000005.bt		411309

COCA COLA CO (Filer) CIK: 0000021344 (see all company filings)

IRS No.: 580628465 | State of Incorp.: DE | Fiscal Year End: 1231
Type: 10-K | Act: 34 | File No.: 001-02217 | Film No.: 1562865
SIC: 2080 Beverages
Assistant Director 9

Business Address
ONE COCA COLA PLAZA
ATLANTA GA 30313
4046762121

Mailing Address
ONE COCA COLA PLAZA
30313

9:56 AM
3/29/2011

How to Import Data into Excel from EDGAR

CONOLIDATED STATEMENTS OF INCOME

The Coca-Cola Company and Subsidiaries

<TABLE>
<CAPTION>

Year Ended December 31,	2001	2000	1999
(In millions except per share data)			
<S>	<C>	<C>	<C>
NET OPERATING REVENUES	\$ 20,092	\$ 19,889	\$ 19,284
Cost of goods sold	6,044	6,204	6,009
GROSS PROFIT	14,048	13,685	13,275
Selling, administrative and general expenses	8,696	8,551	8,480
Other operating charges	-	1,443	813
OPERATING INCOME	5,352	3,691	3,982
Interest income	325	345	260
Interest expense	289	447	337
Equity income (loss)	152	(289)	(184)
Other income-net	39	99	98
Gains on issuances of stock by equity investees	91	-	-
INCOME BEFORE INCOME TAXES AND CUMULATIVE EFFECT OF ACCOUNTING CHANGE	5,670	3,399	3,819
Income taxes	1,691	1,222	1,388
INCOME BEFORE CUMULATIVE EFFECT OF ACCOUNTING CHANGE	3,979	2,177	2,431
Cumulative effect of accounting change, net of income taxes	(10)	-	-
NET INCOME	\$ 3,969	\$ 2,177	\$ 2,431

Find: lated statements of income

Next Previous Highlight all Match case

10:12 AM 3/29/2011

I. Use Find function by holding down CTRL+F on keyboard

J. Enter “Consolidated Statements of Income” in Find box and select next until data is found

5.

How to Import Data into Excel from EDGAR

Import into Excel

- A. Once the data table has been located you will notice a yellow box with a black arrow.
- B. Click yellow box with a black arrow above the table to select the table (the box should change into a green box with a check mark to indicate it has been selected)
- C. Click Import
- D. Click OK to import into Excel
- E. Data is now imported into worksheet.

To import data into adjacent cells select cell where data import should start and repeat from step 1b.

How to Import Data into Excel from EDGAR

A. Once the data table has been located you will notice a yellow box with a black arrow.

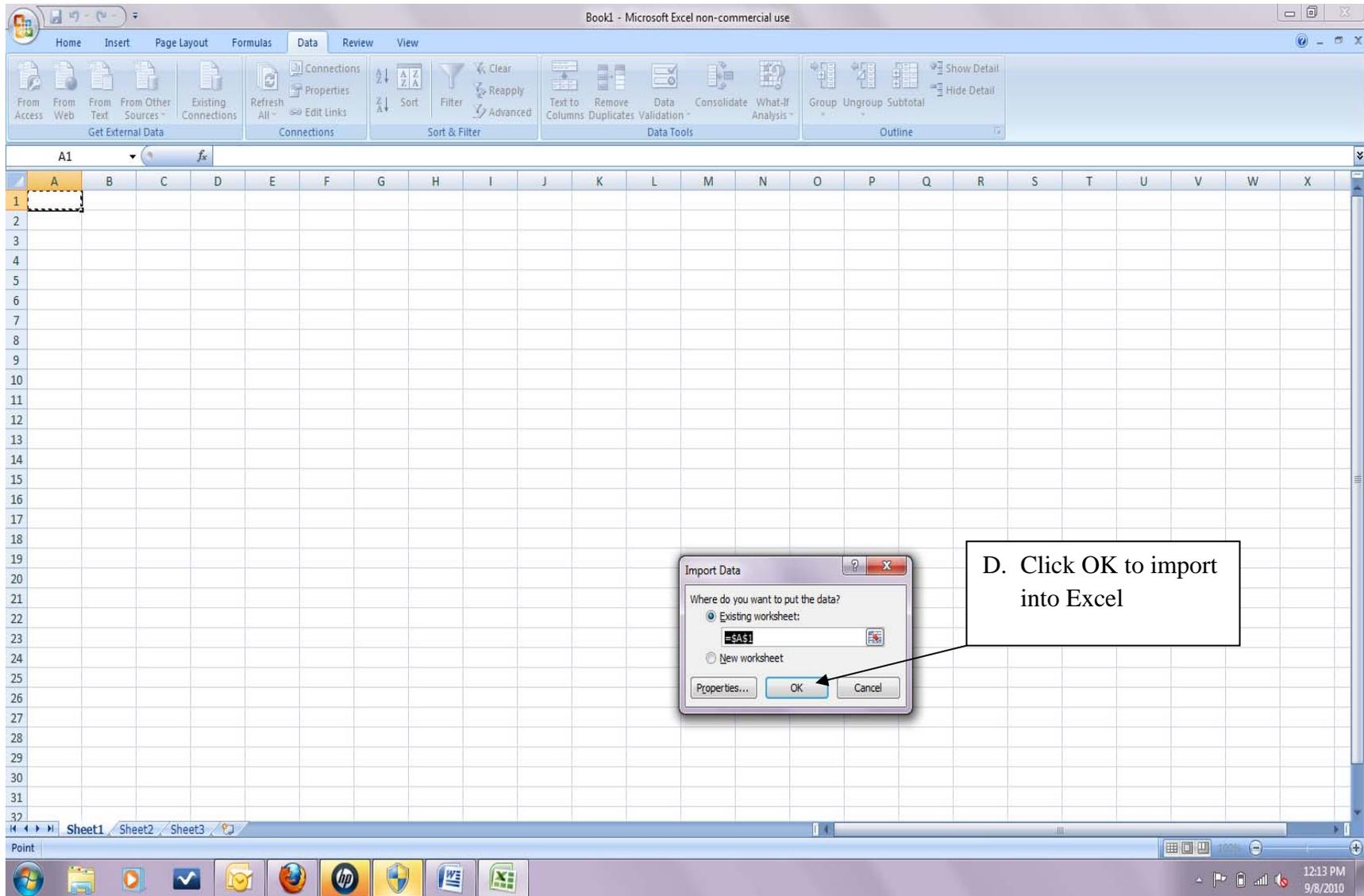
B. Click yellow box with a black arrow above the table to select the table (the box should change into a green box with a check mark to indicate it has been selected)

C. Click Import

New Web Query
Address: <http://www.sec.gov/Archives/edgar/data/21344> Go Options...
Click  next to the tables you want to select, then click Import.

	2007	2006	2005
THE COCA-COLA COMPANY AND SUBSIDIARIES			
CONSOLIDATED STATEMENTS OF INCOME			
<input checked="" type="checkbox"/> Year Ended December			
<small>(In millions except per share data)</small>			
NET OPERATING REVENUES	\$ 28,857	\$ 24,088	\$ 23,104
Cost of goods sold	10,406	8,164	8,195
PROFIT	18,451	15,924	14,909
general and administrative expenses	10,945	9,431	8,739
operating charges	254	185	85
NET INCOME	7,252	6,308	6,085
income	236	193	235
expense	456	220	240
Equity income—net	668	102	680
Other income (loss)—net	173	195	(93)
Gains on issuances of stock by equity method investees	—	—	23
INCOME BEFORE INCOME TAXES	7,873	6,578	6,690
Income taxes	1,892	1,498	1,818

How to Import Data into Excel from EDGAR



How to Import Data into Excel from EDGAR

The screenshot displays the Microsoft Excel interface with the 'Data' tab selected. The worksheet contains financial data for the years 2007, 2006, and 2005. A callout box highlights the data in column E, indicating that it has been imported from EDGAR.

	2007	2006	2005
Year Ended December 31, (In millions except per share data)			
NET OPERATING REVENUES	\$ 28,857	\$ 24,088	\$ 23,104
Cost of goods sold	10,406	11,164	8,195
GROSS PROFIT	18,451	15,924	14,909
Selling, general and administrative expenses	10,945	9,431	8,739
Other operating charges	254	185	85
OPERATING INCOME	7,252	6,308	6,085
Interest income	236	193	235
Interest expense	456	220	240
Equity income—net	668	102	680
Other income (loss)—net	173	195	(93)
Gains on issuances of stock by equity method investees	—	—	23
INCOME BEFORE INCOME TAXES	7,873	6,578	6,690
Income taxes	1,892	1,498	1,818
NET INCOME	\$ 5,981	\$ 5,080	\$ 4,872
BASIC NET INCOME PER SHARE	\$ 2.59	\$ 2.16	\$ 2.04
DILUTED NET INCOME PER SHARE	\$ 2.57	\$ 2.16	\$ 2.04
AVERAGE SHARES OUTSTANDING	2,313	2,348	2,392
Effect of dilutive securities	18	2	1
AVERAGE SHARES OUTSTANDING ASSUMING DILUTION	2,331	2,350	2,393