

Inside-Out

COMPLETE REFERENCE GUIDE FOR ACADEMIC FACTIVA.COM

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Getting Started

Logging In

Academic institutions are sent a unique login URL when their *Factiva.com* account is activated. This embedded link includes the institution's IP range and the *Factiva.com* user name and password. To access *Factiva.com*, simply click on the link on your library website or similar location. Because the embedded link already includes all the information required for your institution to access *Factiva.com*, it can only be used within your institution's IP range. If you are remote users outside of this IP range, you will need to contact Customer Services on customer.services@proquest.co.uk to arrange separate access.

User ID and Passwords

Enter your assigned User ID and password. Name Space – a required field for logging in – is used by *Factiva.com* to give organisations more flexibility in assigning User IDs. All academic accounts are set up under the Name Space number 16. If you experience problems logging into your account, please contact support@proquest.co.uk. Remember your User ID's Name Space as well as your password.

You may also elect to have your User ID, password and Name Space stored so that you do not need to enter them each time you log in by checking the 'Remember my login information' box. You may change your password at any time by selecting Preferences and then Password.

User IDs and passwords are case-sensitive. If you receive a message indicating that your User ID or password is invalid, re-enter them exactly as they were set up. If you receive a message indicating that your User ID and password are already in use, it may be that your account has reached the maximum number of concurrent users. Please contact your library administrator.

Logging Out

Your session is automatically set to time out when no activity is detected or whenever you close your browser completely. The default time out is 30 minutes but can be increased to 59 minutes. Please contact your library administrator if this period needs to be increased. If *Factiva.com* shuts down due to inactivity you will be returned to either of the following options, depending on how your institution accesses *Factiva.com*:

- i) If you access *Factiva.com* by clicking a link on your library website you will be returned to this page, where you can simply click on the link again to open *Factiva.com*; or
- ii) If you access *Factiva.com* by user name and password, you will be returned to the logging in page where you can enter your User ID, password and Name Space (this is always 16) to log back in.

Search



The search area of *Factiva.com* allows you to conduct in-depth research using the powerful Factiva Intelligent Indexing™ and free text. The interface offers easy browsing through industry, subject, region and company indexing terms as well as source and language selection. Use the Look Up tab to find specific indexing terms. Use the Free Text box to enter words and phrases connected with powerful operators to create precise free-text searches. When using the Search area of *Factiva.com* for the first time, your screen will have a collapsed view and simply a Free Text box present. To view Factiva Intelligent Indexing™ together with a Free Text search box, simply click the '+' icon next to Select Sources and Factiva Intelligent Indexing™.

Content Available in Search

The Search area gives you access to:

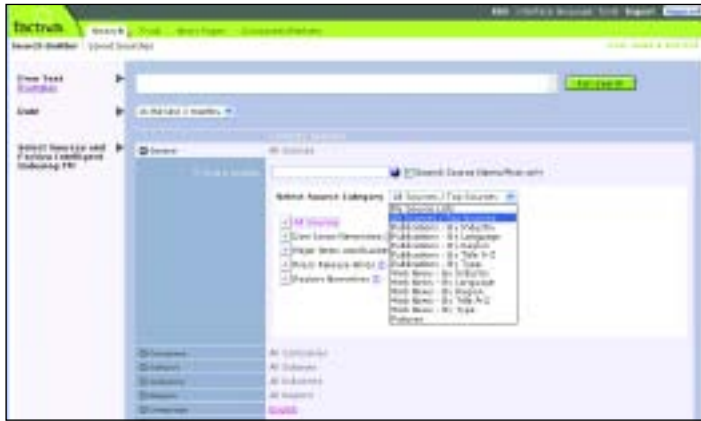
- **over 10,000 publications in 22 languages including:**
 - continuously updated newswires from major global providers including Dow Jones and Reuters
 - major national and regional newspapers including *The New York Times*, *The Wall Street Journal* and *Financial Times*

- magazines
- trade journals
- media transcripts
- Celex database which includes directives, treaties, legislation, case law, and documents from the European Union. For more information on Celex, see Appendix 1: Searching Celex Content in *Factiva.com*.
- **over 4,000 top business and news websites**
 - monitored one to four times per day
 - including content in 22 languages
- **pictures**
 - 3,000 added per week
 - sourced from Reuters and Knight-Ridder

We are continually adding content to *Factiva.com*. To get a complete source list for *Factiva.com*, go to www.Factiva.com/sources.

Selecting Sources

The Select Sources and Factiva Intelligent Indexing™ section of Factiva.com lets you browse or search for particular publications, companies, subjects, industries and regions and add them to your search.



Source – includes browse options for all publications, web news and pictures available in Factiva.com. Also includes “My Source Lists” which can be created by your institution administrator.

Company – includes details for approximately 42,500 companies located worldwide, provided by Reuters Investor.

Subject – Factiva.com has 610+ subject terms which are grouped around eight top-level terms:

- Commodity/Financial Market News
- Content Types
- Corporate/Industrial News
- Economic News
- Editor’s Choice – Industry Trends/Analysis
- International Political-Economical Organisations
- Political/General News
- Sports/Recreation

These top-level terms expand to more granular terms, e.g. Corporate/Industrial News expands to detailed terms like Mergers/Acquisitions/Takeovers and New Products/Services. The Content Type subsection covers information which has a distinct format or type, such as in-depth analysis, rankings, chronologies, transcripts and interviews.

Industry – Factiva.com has 860+ industry terms to cover a huge range of business activity. These terms are structured hierarchically with 30 top-level business sectors:

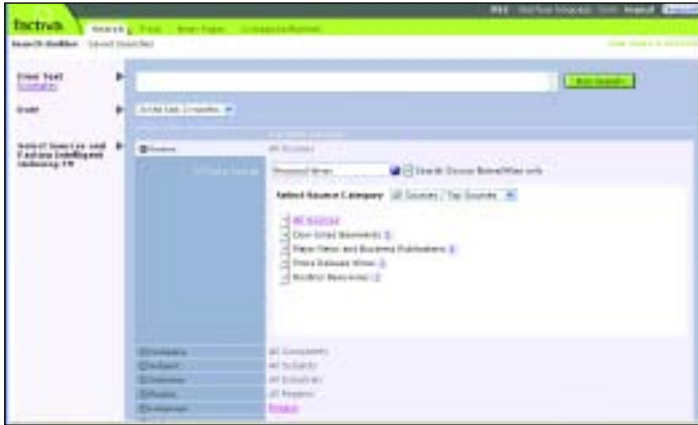
- Accounting/Consulting
- Advertising/Public Relations
- Aerospace/Defence
- Agriculture/Forestry
- Airlines
- Automobiles
- Banking/Credit
- Business/Consumer Services
- Chemicals
- Clothing/Textiles
- Computers/Electronics
- Construction/Real Estate
- Consumer Products
- Energy
- Environment/Waste Management
- Food/Beverages/Tobacco
- Health Care
- Hotels/Restaurants/Casinos
- Insurance
- Internet/Online Services
- Investing/Securities
- Leisure/Arts
- Machinery/Industrial Goods
- Media
- Metals/Mining
- Paper/Packaging
- Pharmaceuticals
- Retail
- Telecommunications
- Transportation/Shipping

The top levels expand to more granular terms, e.g. Internet/Online Services expands to detailed terms like E-Commerce and Online/Direct Banking.

Region – groups content according to which region, country or state the article is about.

Language – provides a listing of publications or websites by language.

Pictures – from Reuters and Knight Ridder.



Adding Sources to a Search

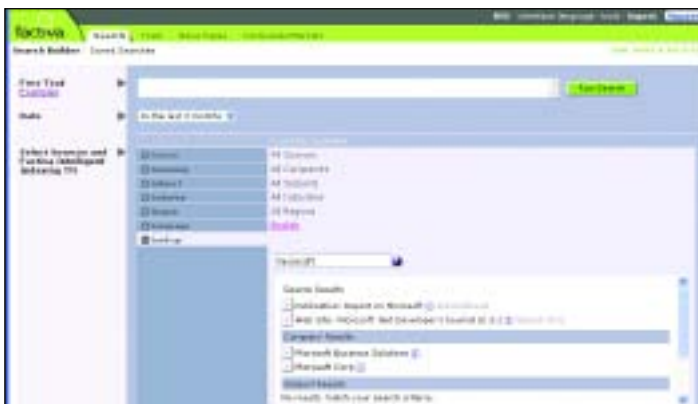
You can choose to browse through the entries for any given index or you can search for a particular source name, company, subject, industry, or region by entering the term in the search box provided.

If you choose to browse through sources by industry, for instance, a list of industry categories will be displayed. Click on the '+' sign next to each industry to reveal sub-categories. To add that industry to your search, click on the title and you will see that it turns pink. If you wish to remove it from your search, click it again and it will automatically be removed. You can also add the code for that industry to your search by clicking on the arrow button that appears next to the industry name. **NOTE: When using the Free Text search box you will need to combine your keywords/codes with Boolean operators.**

If you wish to exclude a particular source, double click the source to strike it through and this will automatically show the Boolean operator 'not' in your source selection.

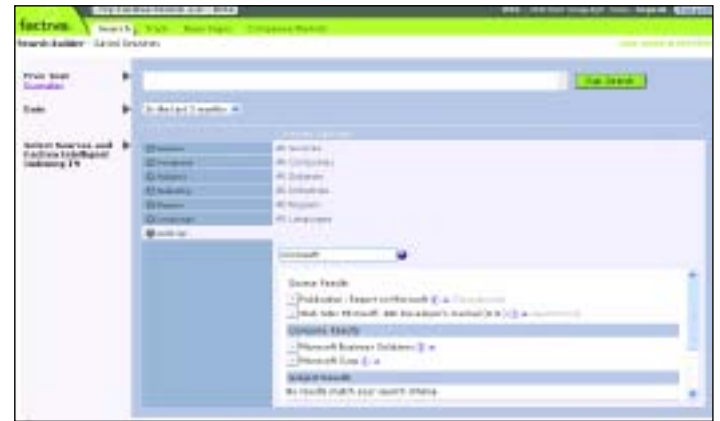
My Source Lists

This category stores customised source lists that have been created by the institution administrator. Administrators can create up to five source lists per institution or 25 per consortium each containing up to 60 sources or groups of sources.



Using the Look Up Option

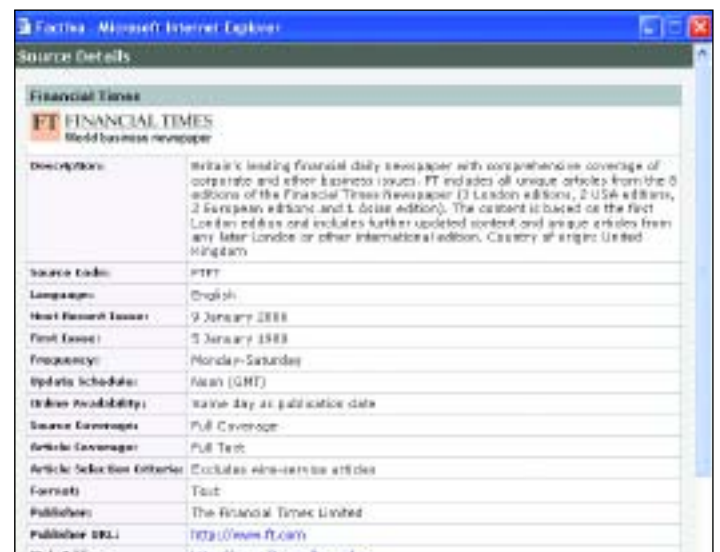
The Look Up option lets you search for particular terms across all the sources, companies, subjects, industries and regions available in Factiva.com and displays relevant matches.



Searching for a Source

To search for a particular source, click on Source and enter the name or subject of interest in the "Find a Source" box and click on Run Search. All titles where your entry was matched in the name or description will be returned unless you check the box Search Source Name/Alias only.

Details are provided for all sources included in Factiva.com and you will see that each source has the symbols ⓘ ▲ after the title. Click on the ▲ icon to add the code for that source to the Free Text search box. Click on the ⓘ icon to display information about that source. Here are some of the details provided about a source:



NOTE: If you do not see the ▲ symbol, it is because it has not been enabled in your Preferences. Please contact your library administrator to learn how to enable the symbol.

Viewing Source Details

Factiva.com provides the following types of content coverage for publications:

- **Full Text** – indicates cover-to-cover or near cover-to-cover coverage of a publication. However, some items found in print are not included, for example advertisements, classified ads and lengthy tabular material such as stock quotations. Letters to the editor, obituaries, wire stories and syndicated columns may also be excluded.
- **Selected Full Text** – coverage includes full-text articles that meet specific criteria based on the type of publication (e.g. newspaper vs. trade publication). For newspapers, selected full text typically includes all articles with a business slant, major news items and articles from the business section of the paper. For trade publications, coverage generally includes items about new products, industry trends, mergers and acquisitions.
- **Abstracts** – summaries of articles. The extent of the publication that is abstracted varies widely. Generally, only a portion of a source is abstracted.

Discontinued and Search Only Sources

Some sources are discontinued or can only be used in the Search area and cannot be used in Track. These are indicated alongside the source.



NOTE: Using Source Codes:

If you have turned on the option to insert indexing into the Free Text search box, you will see the ▲ icon. Click on the ▲ icon next to a source name and the source code will automatically drop into the Free Text search box. This will allow you to retrieve articles from that source alone. Alternatively you may type in rst= together with the source code into the Free Text search box. For example, entering rst=j will retrieve articles from the *Wall Street Journal*.

Free-Text Searching

You can create a search either by entering words in the Free Text search box or by using the Factiva Intelligent Indexing™, or by combining the two. Your search can be up to 2,048 characters long. You may enter search words in upper or lower case. For example, entering 'unicef' will retrieve the same results as entering 'UNICEF'.

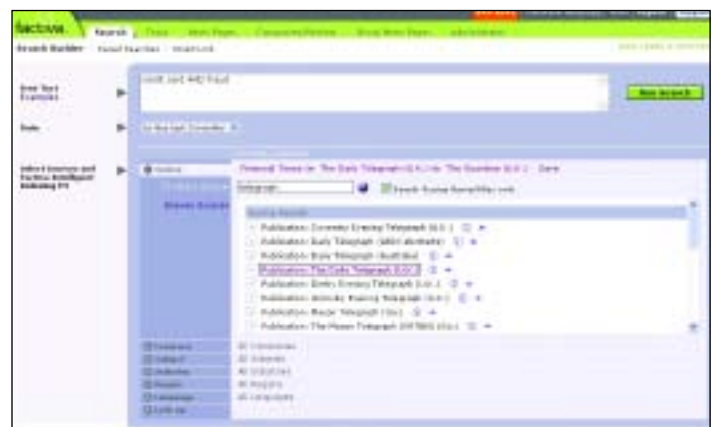
Searching using the Free Text search box

You can use the Free Text search box to search across all the available sources in Factiva.com. You can use standard Boolean operators to create precise searching or you can enter your terms as a phrase. NOTE: Factiva.com will automatically assume you are searching for a phrase unless you enter a Boolean operator.

You can also choose to narrow your search to a particular date range using the date drop-down menu.

More Search options

Here you can choose to search within the full text of an article, by both headline and lead paragraph, by headline or by searching for particular authors. You can choose to exclude republished news, recurring pricing and market data, and obituaries, sports and calendars. You can also choose to receive your results by publication date, most recent first or oldest first.



How to use operators

You can use the operators below to create a precise free-text search.

| Operators | Action | Example |
|-----------|--|---------------------------------|
| And | Retrieves documents containing both terms | online banking and Spain |
| Or | Retrieves documents containing one or more terms | mobile or cellular |
| Not | Excludes documents containing terms following NOT | java not coffee |
| Adjn | Links terms based on specified number of words from each other. Terms must appear in order indicated. N may be 1-10, inclusive; adj and adj1 are synonymous | table adj2 tennis |
| w/n | Links terms based on specified number of words from each other. Terms must appear in order indicated. N may be 1-10, inclusive. Identical to adj but a value for n is required | Nokia w/3 digital |
| Nearn | Links terms based on specified number of words from each other. Terms may appear in either order. N may be 1-500, inclusive. No value for n is required. Near and near1 are synonymous | music near5 Beethoven |
| /nn/ | Links terms based on specified number of words from each other. Terms may appear in either order. N may be 1-500, inclusive. A value for n is required | football /n5/ injury |
| /fn/ | Retrieves documents where search terms must appear within the first (n) words of the document text. N may be 1-500, inclusive Operator cannot be used: <ul style="list-style-type: none"> • in Track Folders • in field-qualified expressions e.g. (lp=china)/ f100/ • with the atleastN operator e.g. atleast3china/ f100/ • with ranges such as word count e.g. taxes and wc>50/ f100/ | global warming/f50/ |
| Same | Retrieves documents where terms appear in the same paragraph. Cannot be used repetitively, e.g. Incorrect: <i>Tobacco same nicotine same tar</i> Correct: <i>Tobacco same (nicotine and tar)</i> | tobacco same nicotine |
| Atleastn | Frequency operator used to specify a minimum number of times the search words must appear in the text. N may be from 1-50, inclusive. Note: not available in Track. Must be preceded by and, or, not in complex search, e.g. Incorrect: atleast5 (Dow Jones and Reuters)Correct: atleast5 Dow Jones and atleast5 Reuters | atleast2 Reuters |

| Processing order of operators | | | | | | | | | | | | | | | |
|--|---|---------|---|--------------------------------|---|------------------------------------|---|---|---|-----|---|-----|---|----|---|
| <p>When creating a search using multiple operators, it is best to use parentheses or square brackets to group similar terms or concepts. The processing order is as follows:</p> <table border="0"> <tr> <td>Hierarchy Level</td> <td>Element</td> </tr> <tr> <td>1</td> <td>parentheses or square brackets</td> </tr> <tr> <td>2</td> <td>same, adjN, w/N, nearN, /nN/, /fN/</td> </tr> <tr> <td>3</td> <td>atleast and field qualifiers, (e.g. by=smith)</td> </tr> <tr> <td>4</td> <td>not</td> </tr> <tr> <td>5</td> <td>and</td> </tr> <tr> <td>6</td> <td>or</td> </tr> </table> <p>Parentheses are particularly important when constructing a search with the and and or operators.</p> | Hierarchy Level | Element | 1 | parentheses or square brackets | 2 | same, adjN, w/N, nearN, /nN/, /fN/ | 3 | atleast and field qualifiers, (e.g. by=smith) | 4 | not | 5 | and | 6 | or | <p>Examples:</p> <p>Brackets and Boolean WRONG: wheat and pesticides or herbicides RIGHT: wheat and (pesticides or herbicides)</p> <p>Brackets and Same Operator WRONG: Mercury same Venus same Mars RIGHT: Mercury same (Venus and Mars)</p> <p>Brackets and atleast Operator WRONG: atleast3 (salt and pepper) RIGHT: atleast3 salt and atleast3 pepper</p> |
| Hierarchy Level | Element | | | | | | | | | | | | | | |
| 1 | parentheses or square brackets | | | | | | | | | | | | | | |
| 2 | same, adjN, w/N, nearN, /nN/, /fN/ | | | | | | | | | | | | | | |
| 3 | atleast and field qualifiers, (e.g. by=smith) | | | | | | | | | | | | | | |
| 4 | not | | | | | | | | | | | | | | |
| 5 | and | | | | | | | | | | | | | | |
| 6 | or | | | | | | | | | | | | | | |

How to use truncation

The documents you retrieve will contain an exact match of the words and phrases you enter unless you specify a truncation character or characters. When you use the \$, * or ? characters, try to precede the \$, * or ? characters with as much of the word as possible to ensure more precise results. For example, a search on advertis* will return better results and perform faster than adv*. Available truncation is as follows:

| Character | Action | Example |
|-----------|--|----------------------|
| \$n | Used at the end of a word string. At least three characters must be entered before \$. The number entered after the symbol determines the maximum number of characters that will be searched for after the stem. Earn\$4 retrieves earn, earning and earnings. n must be 1-9, inclusive. If no number is used, n is five. | earn\$3 |
| * | Used at the end of a word string. At least three characters must be entered before *. No values should be entered. Lab* retrieves labour, laboratory. There is no limit to the number characters, beyond the stem term, that will be retrieved. Note: This is the recommended truncation character to retrieve many British English and American English spellings. | labo* |
| ? | Single wildcard character. At least three characters must be entered before ?. Letters can be entered after the ?. A letter must appear where ? is entered. Labo?r will retrieve Labour but not Labor. | globali?ation |

How to enter words or phrases with punctuation

The following punctuation marks are optional: hyphens, full stops, apostrophes, commas, and the slash (/) character. For example, entering "Coca-cola" will retrieve the same results as entering "Coca cola." However, when searching for words or phrases that contain the & (ampersand), @ (at), or the + (plus) signs, these signs must be included in your free-text terms search.

Reserved words

There are a small number of words that must be enclosed in double quotes in order for them to be searched. These words are:

and or not same near date

For example, enter "not for profit" or "peas and carrots" to retrieve documents with those phrases.

Note: There are no unsearchable words (e.g. "stop words") in *Factiva.com*.

How to search for articles by length

You can retrieve articles by the number of words they contain using wc>n or wc<n. Articles with fewer than 100 words tend to be short articles, wire stories or abstracts. Articles over 2,000 words tend to be longer and more analytical. Articles over 5,000 words tend to be media transcripts. Examples:

- For longer articles on stem cell research, enter: atleast5 stem cell research and wc>2000
- For short articles on the former Beatle George Harrison, enter George Harrison and wc<100

How to search in specific fields

You can search for free-text terms in particular parts of the document. Use the "Search for free-text term in" pull-down menu which can be found by clicking the '+' next to More Search Options. You can also search for words or phrases in particular fields by entering the field label, followed by an equals sign (=) and the words you would like to find in that field. For example, hlp=diamond ring or art=cabernet sauvignon.

To search for words or phrases in headlines and other words or phrases in the text of the document, enter, for example, hl=caffeine and td=health. When manually entering field labels in this manner, make sure the "Search for free-text terms in" is set for Full Article.

Document content is divided into different fields for searching and display purposes. The following table lists the label and name for each field along with what is contained in each:

| Field Label | Field Name | What It Contains |
|-------------|------------------------------------|--|
| AN | Accession Number | Unique <i>Factiva.com</i> identification number assigned to each document |
| HL | Headline Group | Includes Section, Column and Headline |
| HLP | Headline/Lead Paragraph Group | Includes Section, Column, Headline, Correction and Lead Paragraph Fields |
| SE | Section | Section Name (Example: Business or Sports) |
| CLM | Column | Column Name (Example: Work and Family) |
| HD | Headline | Headline |
| CX | Correction | Correction Field |
| LP | Lead Paragraph | First two paragraphs of an article |
| BY | Author | Author, or by-line, of an article |
| WC | Word Count | Number of words in document |
| CR | Credit Information | Credit Information (Example: Associated Press) |
| SN | Source Name | Source Name |
| SC | Source Code | Source Code |
| NGC | Source Group Name | Publication Group Name (Example: ABIX) |
| GC | Source Group Code | Publication Group Code (Example: ABXSMH) |
| ED | Edition | Edition of publication (Example: Final) |
| PG | Page | Page on which article appeared (Note: Page-One Story is a Factiva Intelligent Indexing™ term) |
| VOL | Volume | The volume and/or number of the publication |
| LA | Language | Language in which the document is written |
| TD | Text | Text following the lead paragraphs |
| CT | Contact | Contact name to obtain additional information |
| RF | Reference | Notes associated with a document |
| ART | Captions, Descriptions of Graphics | Contains the content of captions or any descriptions of graphical elements |
| CO | Dow Jones Ticker Symbol | Dow Jones Ticker Symbol |
| FDS | <i>Factiva.com</i> Data Symbol | Factiva Intelligent Indexing™ Company Code for Quoted and Unquoted Companies |
| RIC | Reuters Instrument Code | Reuters Instrument Code |
| IN | Industry Code | Factiva Intelligent Indexing™ Industry Code |
| NS | Subject Code | Factiva Intelligent Indexing™ Subject Code |
| RE | Region Code | Factiva Intelligent Indexing™ Region Code |
| DE | Descriptors | Contains all available descriptors applied to a document including Factiva Intelligent Indexing™ |
| PUB | Publisher Name | Publisher of information |

Note: When you enter words and phrases in the Free Text search box and use the default setting of Full Article for “Search for free-text terms in”, you are searching the following fields:

SE, CLM, HD, CX, LP, TD, CT, RF, ART, BY and CR

You are not searching the indexing fields. To include indexing fields in your search, you must either select the appropriate Factiva Intelligent Indexing™ or enter a search as follows: market share or de=market share.

How to select dates

For date searching, you may select from several pre-set dates, including All Dates, In the last 3 months (this is the default setting) or In the last day. You may also enter your own date range by selecting the Enter Date Range option.

How to select content language

Content for *Factiva.com* is available in 22 languages. The default is to search English language content. If you do not wish to search English content exclusively, you may select all content languages or specific languages by using the Language option below the Sources tab. Once highlighted, the language selection will automatically be dropped into the Indexing box as part of your search creation.

Please note that initial language defaults are determined by the address supplied during registration. If the address provided corresponds to one of the 22 languages covered by *Factiva.com*, your default languages will be English and the corresponding language. For example, if the address supplied during registration was in France, your initial language defaults would be English and French.

If you are experiencing difficulties displaying some language characters correctly, you may need to install the appropriate language fonts. Please contact your System Administrator for instructions on how to download additional language packs on your computer.

How to filter content

To exclude certain types of content from your search, use the Exclude area which can be found by clicking on More Search Options. The three options you may choose to exclude are:

- **Republished news:** excludes newswire articles from organisations such as *The Associated Press* that are repeated in other publications; this option also excludes stories that have been picked up by sister publications.
- **Recurring pricing and market data:** excludes regular prices for shares, foreign exchange, equities, funds and commodities.
- **Obituaries, sports, calendars...:** excludes obituaries, calendars of events, letters, diaries, weather items, news about food and cooking, sports and recreation, birth, marriage and death announcements.

Note: exclusion filters are maintained by applying Factiva Intelligent Indexing™ terms to certain articles. They are available for publications from February 2001 to the present.

Factiva Intelligent Indexing™ Search

Factiva Intelligent Indexing™ is a unique indexing process that assigns the following four types of codes universally across all content in the Search area:

- Company Codes
- Industry Codes
- Regional Codes
- Subject Codes

Factiva Intelligent Indexing™ – Key Facts:

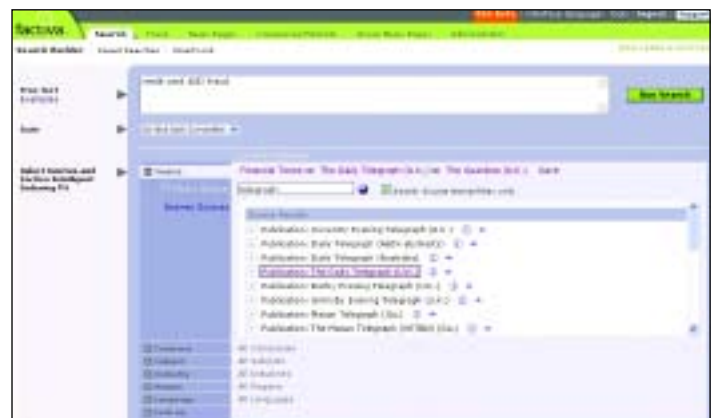
- These terms are based on indexing standards including NAICS (for Industry), ISO (for Regions) and IPTC (for News).
- There are up to five levels of hierarchy within Factiva Intelligent Indexing™ – this means that when selecting the industry term for Telecommunications, you will also be searching all of the granular telecommunications terms.
- Terms are reviewed quarterly for new additions.

More information about Factiva Intelligent Indexing™ is available at www.Factiva.com/indexing.

How to build a search using Factiva Intelligent Indexing™

To build a search, browse through the industry, region or subject terms or use the Look Up tab to find specific indexing terms or company codes. To add a source to your search, click once on the title and you will see that it turns pink. If you wish to search a number of sources simultaneously, continue to search, selecting a title until it turns pink. You will notice that the source terms are automatically assigned the OR operator as your search query develops. You can change the Boolean operator by clicking on the word OR, or by selecting the radio button to the right of the screen within the Factiva Intelligent Indexing™ box.

To de-select a source, click on it again. If you wish to exclude a term by applying the not operator, double-click on the term you wish to eliminate and this will strike it through.

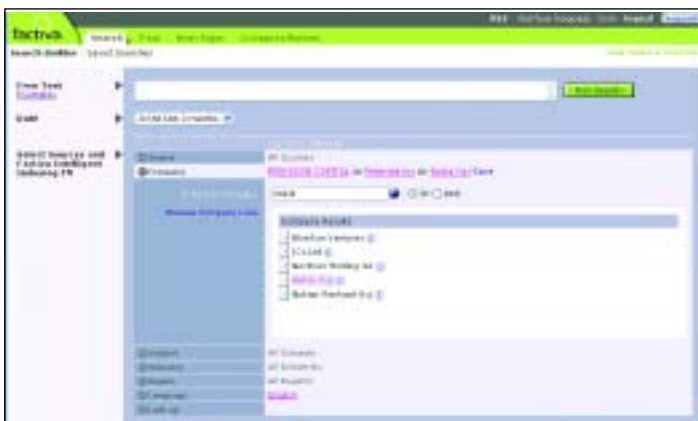


NOTE: The relationship between the Factiva Intelligent Indexing™ box and the Free Text search box is the Boolean *and* operator.

You can also choose to search across all 40,000+ companies that are listed in *Factiva.com*. Or you can choose to search and retrieve information for a specific company or companies. Simply enter the name of the company you are looking for in the Find a Company search box, and click . To add the company to the search, click on the name - it will turn pink. Alternatively you can add the code for that company to the Free Text search box by clicking .

To search for a set of companies, enter the name of the first company you are looking for in the search box and select it so it turns pink. Enter the name of the second company in the search box and select it so it turns pink. Continue this process until you have added all your companies to your search. You will see that as you follow this process, *Factiva.com* automatically assigns the OR operator to your list of companies. If you decide to remove a company from your search, click on the name again and it will be removed.

If you wish to exclude a company from your list of results, simply click on the name twice from within Company Results and you will see that it is added to the search with the NOT Boolean operator:



Viewing details of your indexing terms

Each indexing term is provided with additional information about the code, a description/definition of the code and when the code

was first applied in Factiva Intelligent Indexing™. Hover your mouse over the term to see the definition or click on the to get the full details. Similarly, if you have selected a company, click on the and you will see additional information about that company, the company code, location, primary industry and in most cases, the ultimate parent and subsidiaries.



Using codes in your search

There may be times when you choose to use the indexing codes in your search rather than the terms. To do this click on the next to the Factiva Intelligent Indexing™ term and it will automatically be dropped into the Free Text search box. For example, company codes are preceded with fds= (fds means *Factiva.com* Data Symbol). When selecting an industry, region or subject term you will see the actual code for those terms, such as in=iint for Internet and Online Services.

Codes are placed in the Free Text search box without connectors. You must manually enter connectors between the codes. For example, if you select the industry code for Internet and Online Services and want to combine it with the region code for Italy, you would have to enter *and* between the codes (in=iint and re=italy).

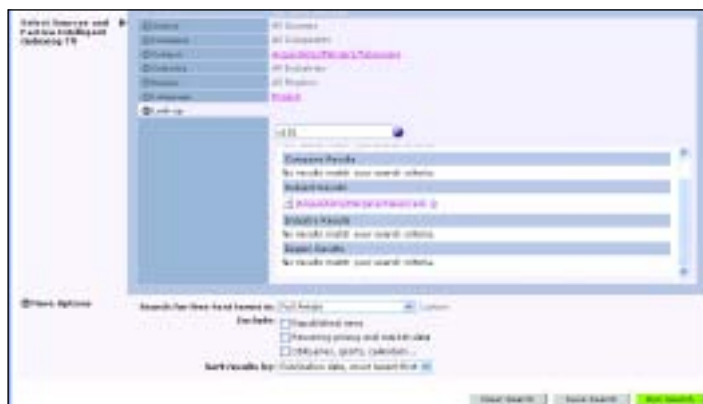


Reverse Code Look Up


You can also locate Factiva Intelligent Indexing™ terms by entering the corresponding code in the Look up box. For example, if you enter the code c181 in the Look Up box and click on Run Search, you will get back the equivalent Factiva Intelligent Indexing™ term for Acquisitions/Mergers/Takeovers.

This feature is particularly useful for users who have created complex searches using Factiva Intelligent Indexing™ codes. These search strategies often include indexing codes that may be difficult to identify upon revision. For example, a search strategy regarding Microsoft Corporation and Acquisitions, Mergers or Takeovers within the Software Industry may look like this:

fds=mcrost and ns=c181 and in=i330202.



Viewing and Processing Results

Once you have run your search and would like to use the split screen option to view your results, ensure that you have clicked the Frames link located in the top right of your screen. The split screen will appear with your headlines, lead sentences, source name, by-line, date, word count and language in the left-hand frame. You may select the number of headlines that you see at one time in Preferences. The maximum is 100. Select the headlines to view by clicking the individual boxes next to the headlines. Click the “View Selected” icon () and those selected articles will appear in the frame on the right.

To remove the split screen view, click on the No Frames link that appears on the right-hand side of the results list. To view articles in this view, simply click on their titles.

Non-frames:



Frames:



How to select different display formats

You can select from several article display formats. Click on the “View as” pull-down menu to see your choices. You can choose:

- **Full Article** – which displays the complete article
- **Keywords in context** – which displays your keywords in the context in which they appear in the article
- **Full Article/Report plus Indexing** – which displays the complete article plus the relevant Factiva Intelligent Indexing™
- **Headline, Lead Paragraph, plus Indexing** – which displays just the headline and lead paragraph of an article, plus its relevant Factiva Intelligent Indexing™



Here is an example of a Full Article plus Indexing format:



How to use the More Like This automatic search

The *More Like This* feature is available in two places in the Search area: the headline view and the document view. The functionality works as follows:

- **Headline View** – More Like This searches on words in the headline and lead sentences and returns similar documents. You may also highlight specific words and select More Like This.
- **Document View** – More Like This searches on words in the headline and lead paragraph and returns similar documents. In addition, from the article view, you can highlight words in the document and then click More Like This. You will be most successful in retrieving relevant documents if you highlight specific words that are most significant.

How to get more information on related topics

You can easily conduct single-click indexing-based searches in *Factiva.com*. While viewing a document, you will see a yellow area below the *More Like This* link. This is populated with the Factiva Intelligent Indexing™ terms that have been automatically applied to the documents. Clicking a Region, Industry, or Subject term runs a new search based on that indexing term.



How to get more Company information

When you select a Related Factiva Intelligent Indexing™ Company link, you can get more than news articles on the company. Clicking on the company name presents basic information about the company including location, its primary industry and selected subsidiaries.



You can also choose to run a search on this company, add it to your company list or access a Company Snapshot. The Company Snapshot is available only for quoted companies and includes news information about the company, financial results, reports and the option to create your own report.

From within the Company Snapshot, you can also move directly to the Quotes and Charting sections of *Factiva.com*.



How to use tools for managing information

Factiva.com product research determined that up to 40% of a professional searcher’s online searching time is spent reformatting, delivering, and otherwise processing documents after they have been found. Accordingly, we developed document-handling options in *Factiva.com* to save you time:



Select Content to View

Use the Select icon to select and de-select all of your search results on the page. Use the selection boxes next to the documents to select individual items. To help you decide which articles, pictures, websites to view, headlines and lead sentences are displayed.

View Selected

Clicking the eye icon will display selected documents in a *Factiva.com* browser window in the format that you choose. Select the RTF icon to display documents in Rich Text Format. You will see a dialogue box asking if you wish to open the items or save them to your computer. The documents will be opened (or saved if you choose) and you will see them in your word-processing program.

E-mail Your Results

You can e-mail documents in any of the available display formats. Click on the e-mail icon from the headline results page or from within a document. Follow these steps:

- 1 Select the documents you want to e-mail. You may send up to 100 items at once. Click on the e-mail icon to open the e-mail window.
- 2 Enter the e-mail address of the recipient as well as a Reply-To Address. Only one e-mail address may be entered in each box. You can add a message of up to 1,000 characters to the person who is receiving the documents.
- 3 You can add the headlines to a cover letter by choosing the appropriate box.
- 4 Select the format you want from the pull-down box.
- 5 Select the type of e-mail output you want. Your options for publication and website results are HTML or Plain Text. No options are available for pictures or reports.
- 6 Click Send. You will receive a confirmation.

Note: no formatting options are available for websites or reports. Website results include the headline, site name and publication date, lead paragraph and URL. When e-mailing reports, the full report is sent as an HTML attachment. Select the Terms of Use link for information about permitted uses of *Factiva.com* information.

Print Results

Select Format for Printing to strip out any links, background graphics and buttons. You can clean up a list of headlines, or clean up full articles, reports, pictures, and website information. By clicking on the Printer icon, you will launch a new browser window containing your results. Use your browser's commands to print the items.

Save Results

Before saving your results, you will want to strip out any links and other items as with printing. By selecting the Save (disk) icon, you will launch a new browser window containing your results. Use your browser's commands to save the items. Depending on the browser you are using, you may be given the choice of saving the file as a Web Page or Text File.

Track

Track is a current awareness and alerting tool that scans articles upon arrival to *Factiva.com* and continuously ‘crawls’ hundreds of websites for news that matches your interests. The search is performed automatically and your results are returned to a Track folder for online view.

Track – Key Facts:

- You may view results from your Track Folders on your News Pages or in the Track area.
- Results are delivered to a Track folder as soon as 30 minutes after the folder is set up.
- Results remain in Track Folders for 14 days or until 250 documents have been accumulated, whichever comes first. When the document limit is reached, the oldest articles are deleted as new articles are delivered.
- Company Track folders can be easily created by your library administrator.
- Track folders are set up by your administrator.

- 4 You can choose to view articles by publication date, most recent first; publication date, oldest first; relevance or arrival time.
- 5 You can also choose to view the article in full, with the keywords in context, the full article plus the Factiva Intelligent Indexing™ for that article or the headlines/lead paragraph of the article plus Factiva Intelligent Indexing™.

Accessing a Track Folder

- 1 Select Track from the menu bar.
- 2 Choose a folder from the drop-down list:



- 3 You are taken to the results for that folder:



News Pages

News Pages allow you to access the key content areas of *Factiva.com* from one screen. You can create pages that include the ability to select, browse or search up to 10 publications in Newsstand, view your Track Folders, Saved Searches, industry-focused news, research on a global company, pricing information and breaking news. There are two main types of News Pages available to academic institutions:

Factiva Pages

These pages are the default pages created by *Factiva.com* editors. They include access to articles from up to 10 major news sources for your region from the Newsstand component, 5 to 10 market indexes, Editor's Links and Web Resources.

Factiva Pages are currently available with coverage of 18 locations including Asia-North, Asia-Southeast, Australia/New Zealand, Canada, France, Germany, Italy, Spain, United States, United Kingdom, and Global.

Factiva Pages also include other special themed subject pages developed by *Factiva.com* editors in response to world events and issues, as well as industry-specific pages.

NOTE: Factiva Pages cannot be modified by subscribing institutions.



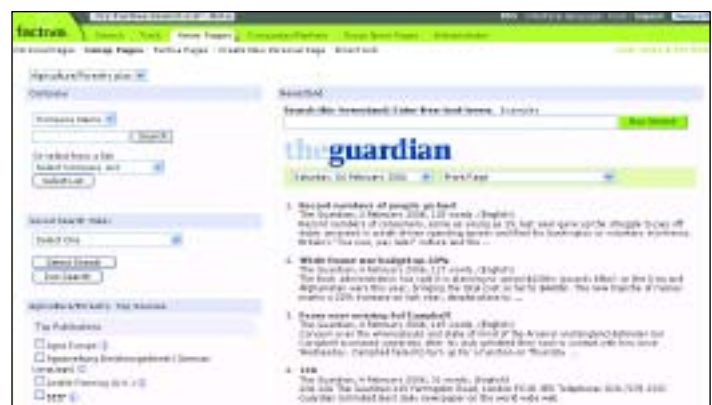
Group Pages

Group Pages are similar to the Factiva Pages except that they are created by subscribing institutions. Your library administrator can create up to 100 Group Pages for your institution. NOTE: Group Pages can only be set up and modified by the administrator.

Using News Pages

News Pages allow library administrators to choose from over 100 of the world's most influential newspapers and general business magazines, browsable by date and by section. News Pages include a 2-week rolling archive for daily publications and the most recent three issues for weekly and bi-weekly publications. Users can browse through the available issues of the news sources by date and by section. They can also search across all news sources; to do this, click the "+" icon next to *Search this Newsstand*.

A free-text box appears. Enter your search terms using Boolean or advanced search operators.



Companies/Markets

Factiva.com provides detailed information to more than 31,000 world-wide public companies from Reuters Fundamentals. In this section, you can view company snapshots, retrieve quotes and create interactive charts.

Company Lists

If your faculty frequently searches for information about the same company or companies, you can create a Company List which is a specific list of companies. This simplifies the process of requesting a Company Quick Search or searching for information about companies in the Free Text search area.

Institutions may create up to 10 group Company Lists and each list can contain up to 500 companies.

NOTE: Company Lists can only be set up and modified by the administrator.

How to search by name or symbol

You have the option to search for companies by name or symbol. When you look up a company by name, enter as much of the company name as possible, ending with an asterisk or dollar sign. Your search will look for aliases and trading names and a list of matching companies will be generated, including subsidiaries and recently acquired companies, the country where the company is headquartered, industry description and whether the company is quoted or unquoted.

When requesting a company by symbol, you may enter either a U.S. ticker symbol or a Reuters Instrument Code (RIC). U.S. ticker symbols may be entered in either upper case or lower case. RICs are case sensitive. If you want to obtain multiple companies and know their symbols, you can enter up to 20 at a time, separated by spaces.

Quotes

The Quotes area of Factiva.com covers various types of securities, including equity and debt that trade on exchanges located around the globe. Specifically, pricing information is available for stocks, funds, market indexes and currencies. Current and historical pricing on actively traded issues is available for each instrument going back approximately 5 years.

Requested data can be presented in one of three formats: a formatted table or a static chart. For certain instruments, you will also be able to link to an interactive chart.

Quotes are provided by two leading market data suppliers – Reuters Investor and SunGard PowerData (formerly known as Tradeline).

How to request quotes for active stocks, funds, or current corporate bonds

- 1 Click *Quotes* from the Companies/Markets tab.
- 2 Select either *Stocks*, *Funds*, *currencies* or *market indexes* from the *Select Instrument* field.
- 3 Enter the symbol or name for your desired instrument. When requesting a quote by symbol, you may enter either a U.S. or Canadian ticker symbol or a Reuters Instrument Code (RIC). Ticker symbols may be entered in either upper case or lower case. However, RICs are case sensitive. Up to 20 symbols, separated by spaces, can be entered at one time. If you choose to search by name, enter the name in upper case or lower case. If you are unsure of the exact spelling, truncate the name with an asterisk, and then click *Look Up*. Instruments matching your inquiry will appear. Check the box(es) next to the instruments you like. You can select up to 20. Alternatively, you can select up to 20 instruments from your *Quotes List*.
- 4 Select your desired date option from the *Date Range* field. *Current Quote* is the default and the only option for Corporate Bonds.
- 5 If requesting quotes for Funds, pick the currency in which you would like to see your quotes displayed. *Currency as Reported* is the default. *Currency as Reported* means the currency corresponds to the country of the exchange listed. For example, for a fund that trades on a U.S. exchange, the *Currency as Reported* would be the U.S. dollar. Should you change your currency selection, you will be prompted to choose between *Current Rate* and *Historical Rate*. Selecting *Current Rate* would recalculate all requested quotes using only the previous day's closing exchange rate. Selecting *Historical Rate* would re-calculate prices for each requested quote with the previous day's closing exchange rate.
- 6 Choose your output format. Formatted table is the default but you can choose a static chart if you wish.
- 7 Click *Get Quote*.

How to request quotes for Market Indexes and Currencies

- 1 Click *Quotes* from the Companies/Markets sub-menu.
- 2 Select either *Currencies* or *Market Indexes* from the *Select Instrument* field.
- 3 A list of available instruments for each type will appear.
- 4 Select the instruments you'd like. To select more than one instrument (up to a maximum of 20), hold the CTRL key as you click the mouse.
- 5 Select your desired date option from the *Date Range* field. *Current Quote* is the default for Market Indexes and Currencies.

- 6 Choose your output format. Formatted table is the default but you can choose a static chart if you wish.
- 7 Click *Get Quote*.



Charting

The Charting area of *Factiva.com* allows you to draw charts for *Stocks*, *Funds*, and *Market Indexes*. These charts are interactive. They do more than just provide a graphical representation of an instrument's activity, but interactive charts will also supply the value for any given datapoint and one-click access to news for *Stocks* and *Funds*. Multiple chart types are available. Included are:

- Candlestick
- High-Low
- High-Low-Open-Close
- Line (default)

Charting additionally contains tools for comparative analysis. For example, you can chart a stock along with a market index, or a stock with its 10-day or 50-day moving average. Up to 10 instruments can be charted on one graph. Please note that a chart with 6 or more instruments will not contain interactive functions.

How to request an Interactive Chart

- 1 Click *Charting* from the *Companies/Markets* sub-menu.
- 2 Enter the symbol(s) for the *Stocks* or *Funds* you would like to chart. You may enter either a U.S. or Canadian ticker symbol or a Reuters Instrument Code (RIC). Ticker symbols may be entered in either upper case or lower case. However, RICs are case sensitive. Up to 10 symbols, separated by spaces, can be entered at one time. To chart a Market Index, check the box of the most popular indexes listed or choose another index from the *Select Another Index* drop down menu. Alternatively, you can select up to 10 chartable instruments from your *Quotes List*.

- 3 Select your desired date option from the *Date Range* field. *Daily prices for the past 3 months* is the default.
- 4 Choose your *Display Options*. There are three fields to complete here. You can decide to display a Moving Average on your chart. A Moving Average chart will not start on the first date of your time series, but it will use the first set of dates to calculate the average. For example, in a 10-day Moving Average chart, the chart will start on day 11 of the graph, as the first 10 days of data are used in the calculation of the average.
- 5 Additionally, you can choose your chart type and indicate whether you would like volume shown for your *instrument in focus*. If you are charting multiple instruments, the *instrument in focus* is indicated by the colour blue.
- 6 To make another instrument the *instrument in focus*, under *Charted Symbols*, click the triangle at the end of the instrument name.
- 7 Click *Draw Chart*.

NOTE: if you are displaying a single instrument, listed on the Y-axis will be the price of the instrument and on the X-axis you will find the date range. If you are displaying two or more instruments, the Y-axis will change to *Percentage Value*, while the X-axis will continue to list the date range. Should your interactive chart not appear, you may need to change your charting option in *Preferences*. As a default, charts are produced using Macromedia's Flash. If your Web browser does not contain the Flash plug-in, your charts will not display properly. You can remedy this by accessing the *Quotes/Market Data* tab in *Preferences*, and switching your charting option from *Macromedia Flash* to *Portable Network Graphic (PNG)*. Interactive Charts can be printed or saved using the processing icons at the bottom of the page.



Click-to-News

After retrieving a chart, you might need more details to help you develop the “full picture” behind the instrument. You can evaluate the increase and decrease in datapoint values on a given chart by simply moving your mouse to any place on the chart. The actual values for the date selected will appear on mouse-over. Additionally, you can left-mouse click on any datapoint, for a charted stock or fund, and to access news for that time period, which may have had an affect on the instrument’s performance.



Company

This section lets you retrieve company snapshots of companies that interest you. Simply enter the company name or symbol and click the symbol. You can also choose companies from a company list that has been created by your administrator.

By starting with a company’s Snapshot you get all the information you need to quickly understand changing business concerns. You can also click any link within the Snapshot to find targeted news, reports, charts, analysis and financial data.

The Snapshot view includes a comprehensive one-page summary, information channels, and supplemental links for additional details:

Company Snapshot Page Summary

| | |
|---|--|
| Company address and contact/phone details | Stock Price Activity, as available |
| Industry classification (Factiva primary industry, SIC, NAICS, NACE) | Business/Trade description |
| Key Executives (Top 5) | News Brief (displays top 5; option to View More: Latest News, Press Releases and Trade Articles. |
| 5-year key financial results (Annual: Balance Sheet, Cash Flow, Income Statement, plus Key Ratios.) | Top fundamentals (sales, number of employees, market cap, net income, net profit margin) |
| Peer Group (default: nearest 10 by Sales, with relative rank and sales figures) | Links to: Peer Comparison table Generate Sales Leads link Competiton List from Reuters link |

Also included in the Company Snapshot view are information channels and supplemental links to the following detailed pages:

- News
- Financial Results
- Reports
- Build a Report

News

Links to News Brief with news articles from Factiva. Use the pull-down menu to view focused news articles related to Latest News, Press Releases and Trade Articles.

Click a headline to view the full article.

NOTES:

- Once an article is opened to full view, you have the opportunity to view additional articles from links located above the headline. Options are: *Latest from this author* and *Latest from this source*.
- Click the Back to *Headlines* link to return to the list of News articles.
- Click the View More link, located at the far right side above the headlines, to view additional articles.
- The Previous link will bring you to the previous article in the list of headlines.
- The Next link will bring you to the next article in the list of headlines.
- You may return to the Company Snapshot at any time by clicking that link, located at the top of the page.

Financial Results

5-year key financial reports available for Public companies, with some exceptions. Financial information is provided by Reuters. Available financial statements are:

- Balance Sheet – Annual
- Cash Flow – Annual
- Income Statement – Annual
- Key Ratios

You can also export this data into CSV format for use with Microsoft Excel.

NOTES:

- Templates, provided by Reuters, are used for displaying financial statements.
- More detailed financial results can be obtained from the Show Details link.
- A link to load financial data into a spreadsheet is available on the right side, above the statement.

Reports

The reports you can run are:

Ratio Comparison Report

Compares key financial ratios of this company against its industry, sector, and the S&P 500 Index aggregates.

Source: Reuters

Detailed Company Profile Report

A detailed outline of this company’s primary activities, top officers and executives, competition, history, products, services, and key financial ratios.

Source: Reuters, Factiva

Detailed Company Profile Report with Financial Results Report

A detailed outline of this company’s primary activities, top officers and executives, competition, history, products, services, key financial ratios, and full balance sheet, income statement and cash flow statements.

Source: Reuters, Factiva

Reports are available from Reuters and Factiva.

Build a Report

This option allows a user to build a customized report incorporating content from the channels within the Company Snapshot.

Reports can be printed or saved to disk.



Appendix 1

Searching Celex content in *Factiva.com*

Celex content can be searched in several ways in *Factiva.com*. It can be accessed from the Search and Track screens and is also available as a search component that can be added to a Personal News Page or viewed on the Factiva News Page for the European Union.

Celex content dates back to 1st January 1951.

Please note that major Celex subjects and keywords have been mapped to Factiva Intelligent Indexing™ terms.

Search by Celex Document Number or Sector Type:

If you are receiving too many documents or don't get the results you are expecting in your Track Folder, you have several options for refining it (which you can also apply on the main Search screen):

Search Celex Document Numbers as they appear in the Headline:

For example, searching ID=32002R1630 or HD=32002R1630 retrieves the headline: "32002R1630 – Commission Regulation (EC) No 1630/2002 of 12 September 2002 providing for the rejection of applications for export licences in relation to certain processed products and cereal-based compound feeding stuffs."

Search by specific Celex Sectors using SE=, the field tag for Section Name:

For example, sc=celexe and SE=2. This search combines the source code for Celex English language, sc=celexe, and the section code for the Celex Sector External Relations (Sector 2). It is recommended that you include either the source code* in your search strategy, or select Celex from the Source Browser. You can add free-text terms and date ranges to further narrow your search. The following are the Celex Sectors and identifying numbers available for searching with SE=:

- Treaties (Sector 1)
- External Relations (Sector 2)
- Secondary Legislation (Sector 3)
- Complementary Legislation (Sector 4)
- Preparatory Works (Sector 5)
- European Courts: Court of Justice, Court of First Instance (Sector 6)
- Parliamentary Questions (sector 9)
- EFTA Relevance (Sector E)
- Other acts published in the Official Journal (Sector c)

*Celex Source Codes:
English Language: SC=CELEXE
French Language: SC=CELEXF
German Language: SC=CELEXG

Accessing Celex Search from News Pages

- 1 Add Celex Search to a Group News Page.
- 2 From Factiva News Pages, use the pull-down menu and select European Union.

Searching Celex Search from News Pages

You have several search options and can enter various search criteria:

- Document Numbers
- Celex number
- EU number
- Free-text key terms, if desired
- Document type
- Date

Celex Search Tips from News Pages

- Searching with an EU number requires entering the publication year for the document. For example, to retrieve EU document 1630 you must enter the year 2002. If you do not know the publication year, we suggest entering a free-text keyword search on the subject of the document, for example: cereals and rice.
- Select a document type by highlighting the category – just click on the category to make a selection. You can select more than one category. To deselect a category just click on it again and the highlighting will be removed. You may also select and highlight All Documents. Document types can be expanded by clicking on the '+' expansion button next to a category allowing you to select additional types within that category.
- Search using free-text key terms is useful if you do not know the identifying document numbers, or wish to retrieve a series of documents on specific issues. As in searching Celex in Search and Track, you can use the field tag se= to search in the Free Text search box for specific Celex Sectors using the designated sector number. Please select All Documents when using se=.

- Select Date Range: either select from the pull-down menu, or click the '+' expansion button to enter a custom date range.
- To return to News Page, click the Return to News Page link (located on the right-hand side, above Headlines) from the Headlines results page.

The following Celex documents are available from the News Page search:

- Treaties
- International Agreements
- Secondary Legislation
- Supplementary Legislation
- Preparatory Documents
- Case Law
- National Implementation Measures – directives
- Parliamentary Measures
- EFTA Documents
- Official Journal C series documents – other

Appendix 2

Quick Guide to Numbers in Factiva.com

This table describes the numbers that are referred to in Factiva.com.

| | |
|--|---|
| Publications | Over 10,000 |
| Websites | 3,500+ |
| Pictures | 3,000+ added weekly |
| Company Data from Reuters | 42,500 |
| Company reports via Media General and World Vest | 25,000 |
| Languages in Search and Track | 22 |
| Saved Searches | 100 |
| Custom Source Lists | 100 |
| Sources or groups of sources in a custom list | 60 |
| Factiva Intelligent Indexing™ company codes | 313,000+ |
| Factiva Intelligent Indexing™ industry codes | 826+ |
| Factiva Intelligent Indexing™ region codes | 346+ |
| Factiva Intelligent Indexing™ subject codes | 525+ |
| Company lists | 10 |
| Companies in a list | 500 |
| Track Folders | 5 per institution / 25 per consortium |
| Articles in each folder | 250 |
| Number of days for article storage in Track Folder | 14 |
| Companies available in Company Screening | 25,000 |
| Quotes lists | 10 |
| Instruments in one Quotes list | 20 |
| Market indexes, funds, corporate bonds, stocks, US Treasury Bills, US Treasury Notes, and US Treasury Bonds | 180,000 equity prices from 85 exchanges worldwide |
| Currency spot rates | 148 |
| Currency cross rates | 35 |
| Group News Pages | 100 |
| Factiva News Pages | 65+ |
| Newsstand Publications | 100+ |
| Number of minutes for default timeout | 30 |
| Maximum number of characters when naming Saved Search, Saved Sources, Company lists, Track Folder, News Page | 25 |
| Number of Instruments per Interactive Chart | 10 |
| Maximum number of chartable instruments allowed for interactivity | 5 |

Appendix 3

Important Technical Requirements

Browsers which *Factiva.com* is optimized for use with:

Internet Explorer 5.5 (Service Pack 2) and above on Windows 95
Internet Explorer 6.0 (Service Pack 1) and above on Windows 98,
NT, 2000, or XP

Internet Explorer 5.1.7 and above on Macintosh OS 9.1 and
above (English interface only)*

Internet Explorer 5.2.3 and above on Macintosh OS X and above
(English interface only)*

*Internet Explorer will no longer be supported in any version for
Mac users after December 2005.

Important Changes to Browser Support

Since June 2005, *Factiva.com* is no longer supported by IE 5.0.1
in Windows.

Since June 2005, *Factiva.com* began supporting standards-based
browsers that support XHTML 1.0.

We are currently recommending the following standards-based
browsers:

Firefox 1.0.2 and above on Windows 98, 98SE, ME, NT 4.0,
2000, XP (recommended), Server 2003

Firefox 1.0.2 and above on Macintosh OS X v. 10.2x+

Safari 1.2 and above on Macintosh OS X v. 10.2x+

NOTE: the recommended browser versions may change as we test
more browsers, including Netscape and Opera, and as we add
access to additional areas of *Factiva.com* from standards-based
browsers.

JavaScript

Factiva.com uses JavaScript to achieve some of its more powerful
and popular capabilities, such as allowing you to select and view
multiple articles at once. Therefore, you must eliminate any firewall
barriers to this program.

Java

Factiva.com does not make use of Java.

Frames

Factiva.com uses floating frames or I-frames extensively. The
inability of some browsers, especially older versions, to effectively
cope with frames is one of the reasons why the product is not
compatible with all browsers.

Cookies

Factiva.com uses "cookies" to store certain product-related
information on a browser, so that information can be returned to
on subsequent visits without having to enter it again. For instance,
cookies allow *Factiva.com* to keep track of where you are during a
session, or to save your user name and password so they do not
need to be entered at every visit. Please note that the contents of
cookies are encrypted. In addition, browser standards guarantee
that outsiders cannot access cookies used by *Factiva.com*.

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