Factiva Online Search Guide

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Summary – getting started

➢ Type a few words related to your topic into the search box and select the required date range from the drop-down menu, then press **Enter** or click the **Search** button. The number of results will show in brackets next to 'All', 'Publications', 'Web News', etc. Just click on the appropriate one to view the results.

➢ To search for an **exact phrase**, put the words in inverted commas in the main search box in the simple search and the search builder.

➢ If there are **alternative words** that could be used for your subject, select the search builder option and place **OR** between the two words to search for records containing either or both terms.

➢ To **exclude** a word from a search, select the search builder option and place **NOT** before the term.

➢ To truncate words with multiple possible endings, place an **asterisk(*)** at the end and enter at least 3 characters before (e.g. *environment* will retrieve environment, environments, environmental and environmentally*.)

2. Simple Search

Simple Search offers a straightforward approach to searching, allowing you to target by source or date. It will search in all fields and looks for words with the same stem. The results can be sorted by relevance or date, in descending or ascending order.
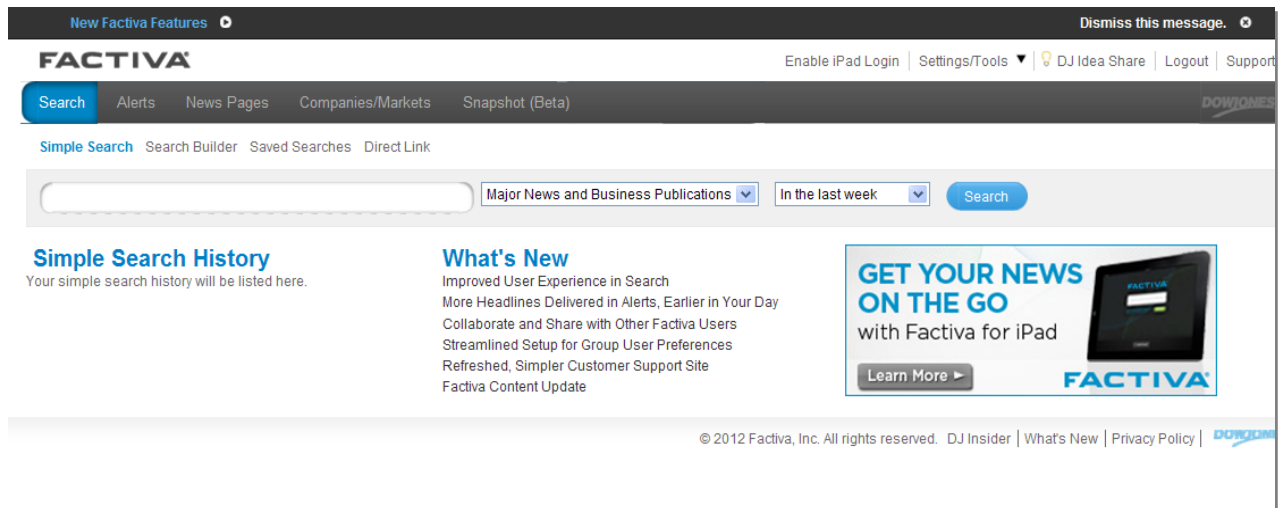
Use the drop-down menus to focus your search to a specific source type or date range.

Your last 10 searches will be saved automatically and shown under **Simple Search History**. With just one click, instantly run the search again for the latest results.

There is a persistant search box which allows you to modify your source selection, keywords, or date selection from the results page.

To instantly monitor your subject going forward, just click **Save as Alert**. You can create up to 25 Simple Search Alerts.

You can view results collectively under the **All** link (as above) or by each content type - Publications, Web News, Blogs, Pictures, and Multimedia, where relevant.

You can view selected articles in a number of ways by clicking on the relevant icon above the results:
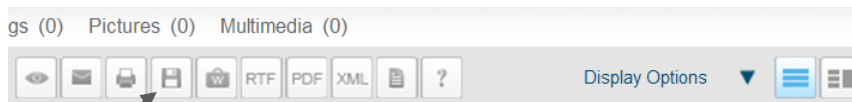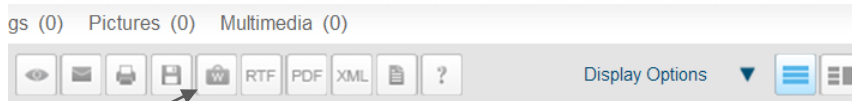

Display your selected articles

Email selected articles. This will let you e-mail articles in a variety of formats (e.g. HTML or Text, Full Article or headline with link to full article).
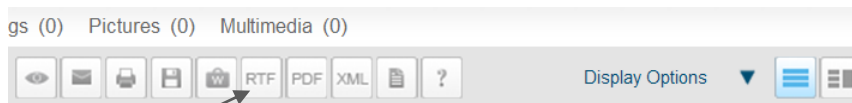

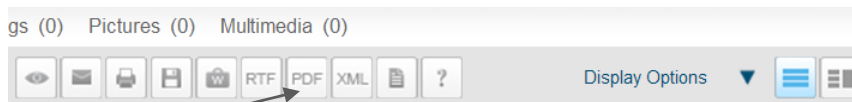Format selected headlines/articles for printing in a new browser window.

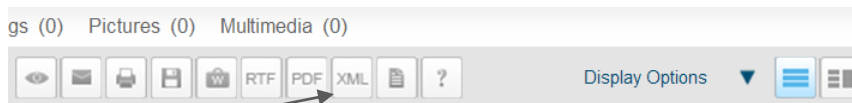Format selected headlines/articles for saving in a new browser window.

Store and share headlines/articles in a workspace organised by topic or project. To view and manage stored workspaces go to **Settings/Tools** at the top of the page.
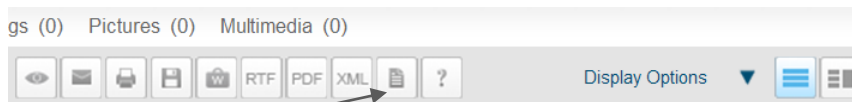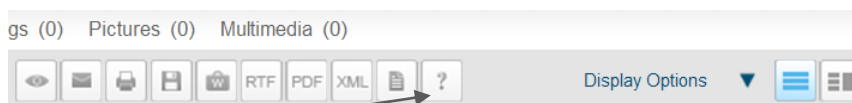
Download selected headlines/articles in RTF format.

Download selected headlines/articles in PDF format.

Download articles in XML format.

Add selected articles to a newsletter which can be distributed in a number of formats. To view and manage stored newsletters go to **Settings/Tools** at the top of the page.

Read post-processing frequently asked questions.

3. Search Builder

The Search Builder allows you to use Free Text Search to explore the full 50+ year Factiva archive of 31,000 sources. With Free Text search, you have full control to build precise searches using a combination of keywords and Dow Jones Intelligent Indexing. You can search using Boolean logic (AND, OR and NOT) and various proximity connectors. You can also search for articles from a single source or for a particular headline or author.
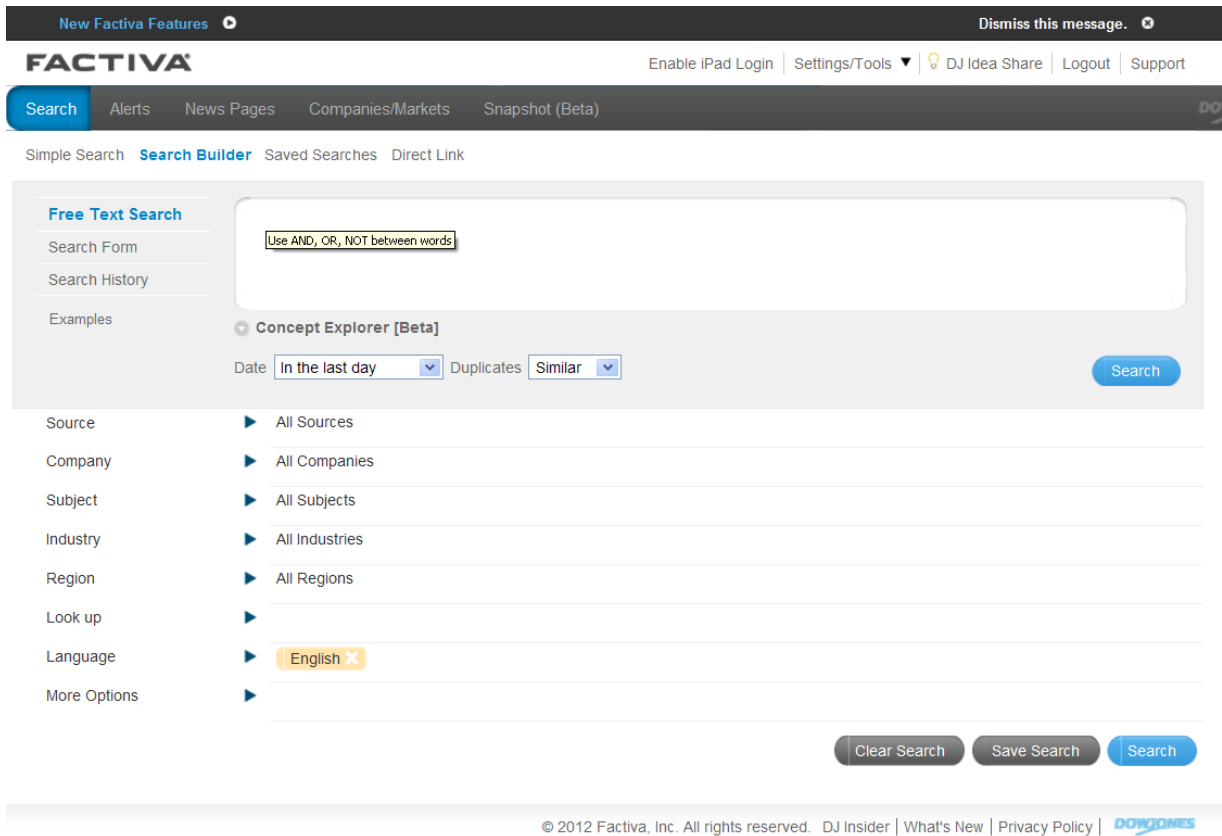
To select a single source, select the **Source** category, enter the source name or part of it (e.g. *times*) in the text box and click the arrow. Then just select the name of the source from the generated list.
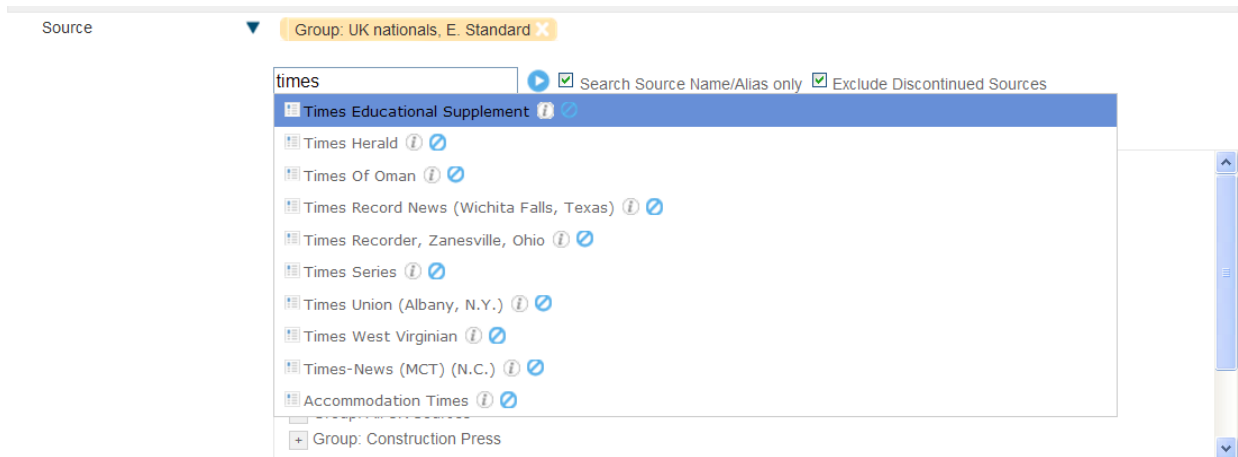
To restrict the search to just the headline or headline and lead paragraph, in the free text search box, enter the terms that should appear in the headline. Click **More Options**. Select **Headline/Headline and Lead Paragraph** from the **Search for free text terms in** drop-down menu (you can also use this to search by author or source name)   Add any additional search criteria and click Search.
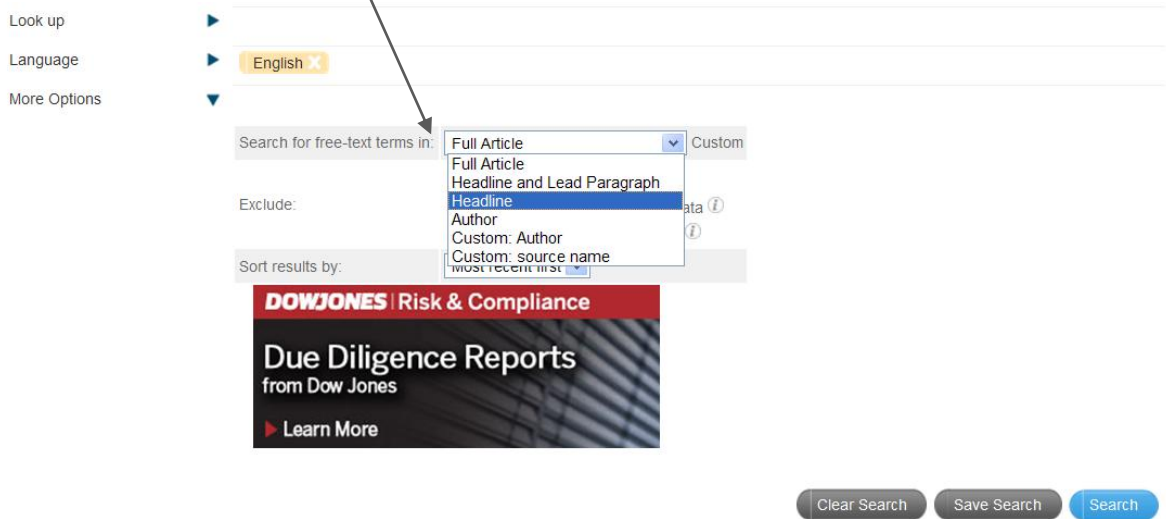
To search with Dow Jones Intelligent Indexing terms, click **Look Up**. Enter your terms in the text box (e.g. marketing) and click the arrow. Select the name of the Dow Jones Intelligent Indexing term(s) you would like to add to your search from the Source Results list. Multiple search terms are automatically connected with OR. Click on OR to change it to AND. To exclude a term, click the blue circle or double click on the name of the term. Click Search.
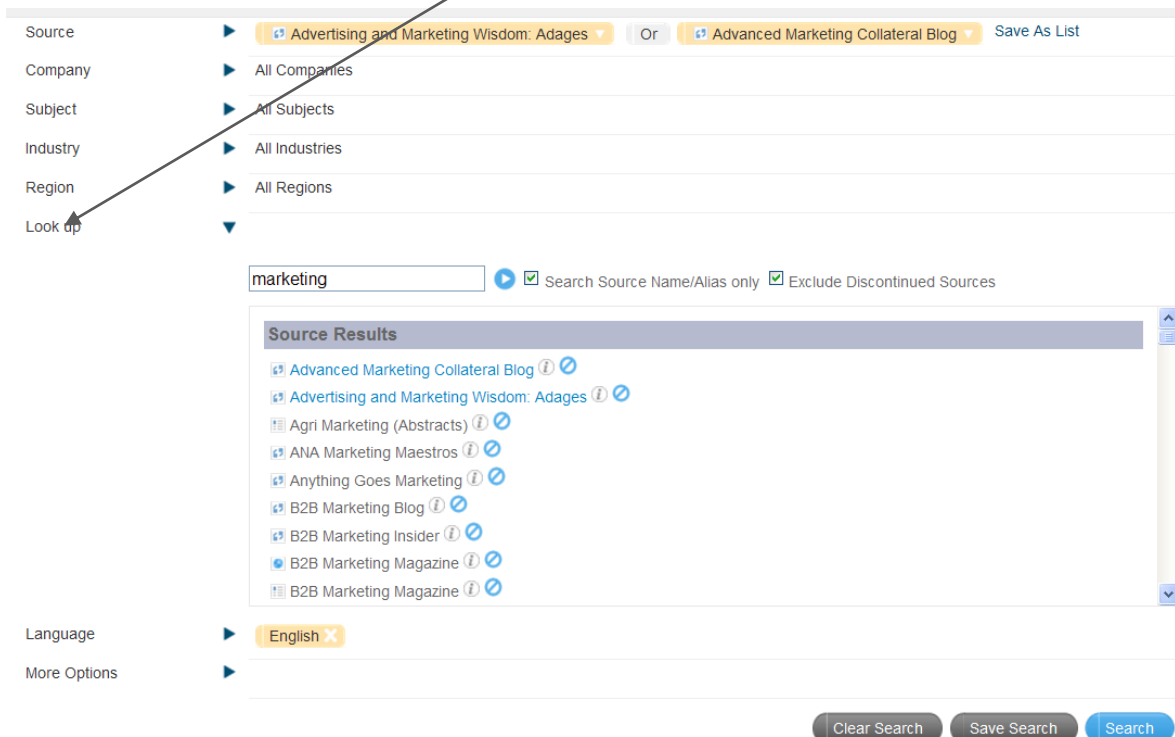
To build a search in the free text search box incorporating Boolean logic and/or proximity connectors, use the search operators as in the table below:

Operator/connector	Use to search for…
and	All the words or phrases you enter. (e.g. *council spending* **and** *London*)
or	One or more of the words you enter. (e.g. *merger* **or** *acquisition*)
not	Exclude items that contain these words. (e.g. *software* **not** *spreadsheets*)
same	Two words in the same paragraph. (e.g. vodafone **same** telecommunications)
atleastn	Words mentioned more than once. (e.g. **atleast5** *Microsoft*) Note: not available for Alerts
( ) (Parentheses)	Group words together. (e.g. *press releases* and **(***university or instruction or courses***)**
* (asterisk)	Words with multiple endings of any length. (e.g. *telecom**) Note: You must enter at least three characters before using *, and * must be entered at the end of a word only.
w/n	Words adjacent to each other in the order specified, within a certain number. (e.g. *wireless* **w/3** *mobile*)
near/n	Words near another word in any order, within a certain number. (e.g. London **near3** 2012

Tip: The following punctuation marks are optional: hyphens, periods, apostrophes, commas, and the slash (/) character. For example, entering "coca-cola" will retrieve the same results as entering "Coca cola."

You can view selected articles in various ways by clicking on the relevant icons as in the simple search results screen.

4. Search Form

Retrieve precise search results using the **Search Form** which guides you through building searches through searching in particluar fields.
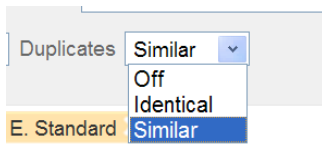

Search form fields:

Terms entered here must appear in each of your results.

One or more of the terms entered here must appear in each of your results.

None of the terms entered here should appear in your results.

Enter a single phrase that should be in all results.

You can also identify duplicate articles by amending the settings in the **Duplicates** drop-down menu.

Clearly identified duplicate articles will appear within your headline pages always remaining accessible to you.

Use **Save Search** to store up to 25 full search queries, including your keywords, sources and Dow Jones Intelligent Indexing selections. Searches can be run any time in the future from the **Saved Searches** option at the top of the screen.

The Discovery pane to the left of the results provides immediate analysis of your search results using charts and graphs.

You can use Discovery to filter and target your results under the various headings which may include:

Date: A timeline breakdown of the number of articles matching your search.
Companies: Ten most mentioned companies.
Executives: Ten most mentioned Executives.
Subjects: Ten most common subjects.
Industries: Ten most mentioned industries.
Sources: Ten most common publications.
Keywords: Most mentioned keywords or phrases in the first 100 articles.
Regions: Ten most mentioned regions.

You can view selected articles in various ways by clicking on the relevant icons as in the simple search results screen.

5. Alerts

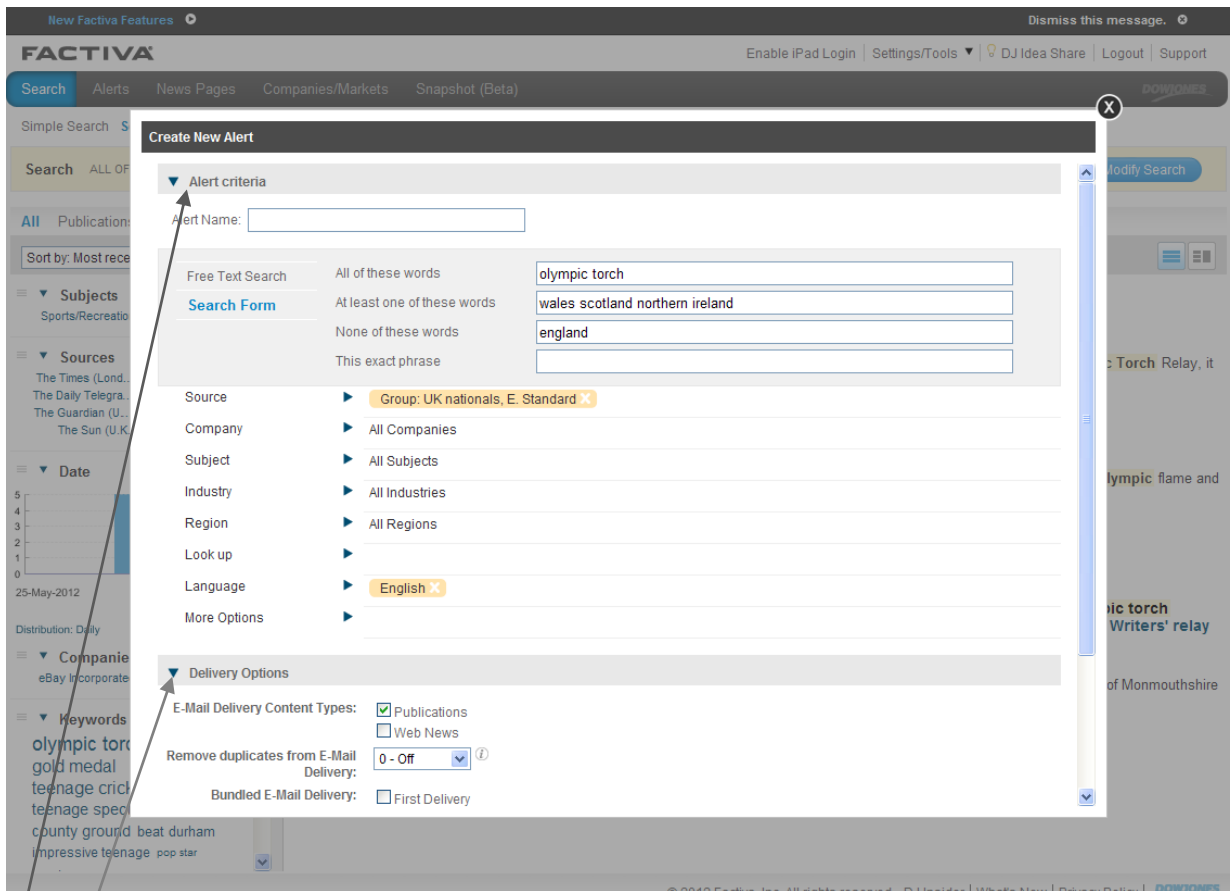At the top of the screen, click on **Alerts** to either view alerts or manage alerts.

There are two types of alert: personal alerts and assigned group alerts. A personal alert is set to private by default. Making an alert public allows you to: invite colleagues to copy your alert to their account; disseminate a public RSS feed; and add the alert to widgets, for posting on intranets and team sites.

To create a new alert, either click on **create new alert** in the Manage Alerts screen or click on Search in the top panel (and then either simple search or search builder to construct a new search). Once your search results have displayed, click on **Save as Alert**.

A new window opens up, which allows the alert's delivery options to be edited.

Alert criteria: Give the alert a name. The search can be limited further at this point, in terms of source, industry, region, etc.

Delivery options:
- Either display just publications, or choose to include web news as well.
- Remove duplicates from email delivery, from off (no duplicate articles) through to 2 (which will remove the highest number of articles which are similar).
- Bundled email delivery: first delivery is about 9am and second delivery is around 4pm.
- Custom email delivery: No custom delivery will mean that you have to log-in to Factiva to see alert results. Chose scheduled e-mail as the default option for most alerts, otherwise continuous emails will be sent throughout the day (with a maximum of 50 headlines sent per day, this option would only be useful for a very short-term alert over a couple of days for a one-off media issue). Early morning delivery is around 5am, morning delivery about 8am, and afternoon delivery around 4.30pm. Once you click on scheduled email, you can choose which email address the alert is sent to and the email format and delivery time options. Emails will include headlines and snippets, with links to the full-text (although you will need to log-on to see the results).

Click **start alerting**.

To view or edit this new alert, go to **view alerts.** This gives a drop-down menu of all the alerts which have been set up. Select one of these alerts to display the results of that alert.

The results can be sorted by date or relevance in ascending or descending order, or you can click on the listed icons to view articles, save, print or download in various formats (see simple search). As in the other search screens, results can be limited to either publications or web news. In the left-hand frame, the results are displayed in graph form, to give an overview of the results' subjects, sources, date, industries, companies, executives mentioned, keywords or regions.

To edit an alert, click on **edit alert** at the top right corner of the screen. You can revise or delete your alerts, and changes will be effective from 30 minutes.

To manage existing alerts go to **manage alerts**.

You can change any option for existing alerts, including delivery, setup, deletion or search criteria.

- **Edit** changes the search query or delivery options.
- **Delete** deletes the alert.
- **Public/Private** is a toggle option that allows you to change the sharing state of your personal alert.
- **Invite** enables other Factiva users to receive your alert results.
- **Make** Widget allows you to create a widget for your site.
- **Save** activates your changes.

To share an alert with other Factiva users:

- Click **Private** to change your folder status to Public.
- Click **Invite** next to a personal alert.
- In the form, enter your name and e-mail address(es) for the Factiva users who who should receive an e-mail invitation to share your alert.
- Add a personal message if desired.
- Click **Copy me** if you would like a copy of the invite sent to you.
- Click **Send Invite**.