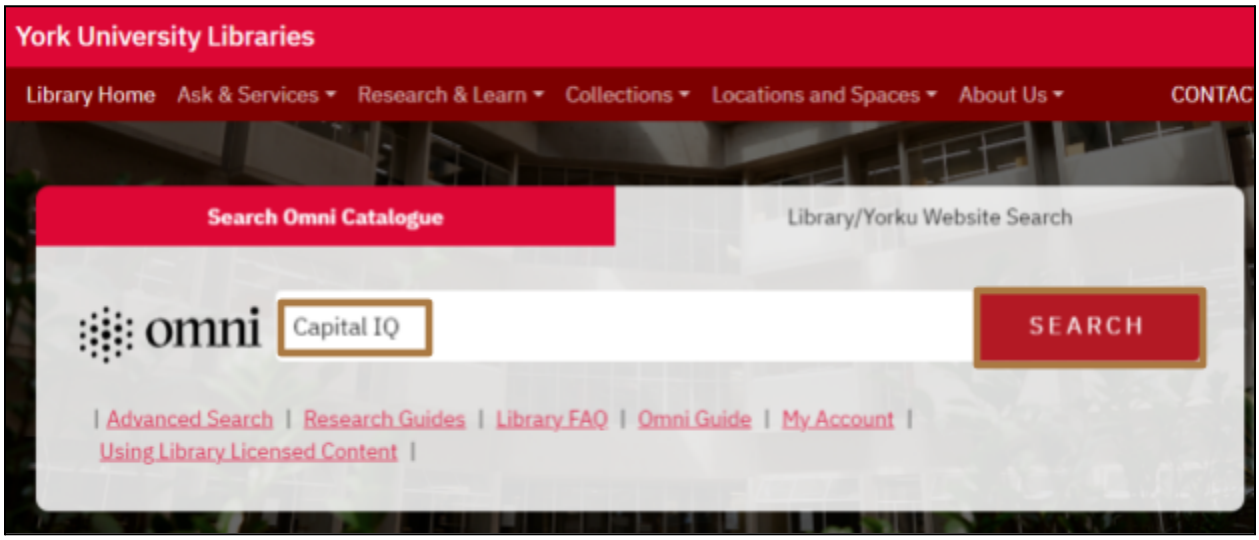
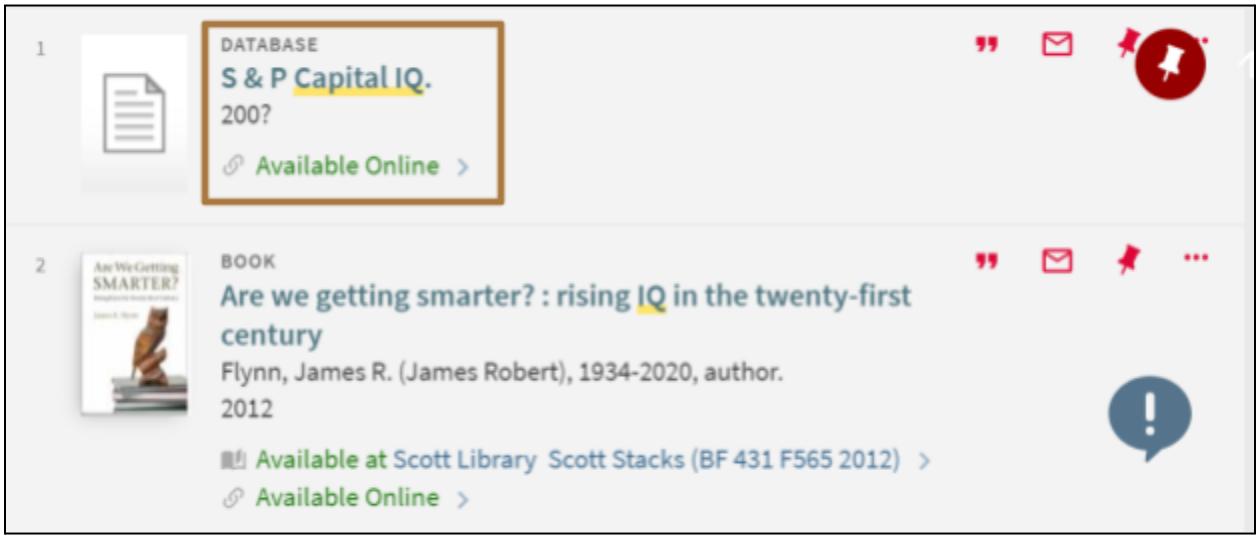
# Step-by-Step: Screening a List of M&As with Capital IQ

**Description:** The following example demonstrates how to screen a list of closed M&A deals in the Information Technology industry in Canada during the last 12 months in Capital IQ.

1. Go to the York University Libraries' homepage, type **Capital IQ** into the Omni search bar, and click **Search.**




2. **Capital IQ** should be the first result in your search results list. Click **Available Online** in the record.

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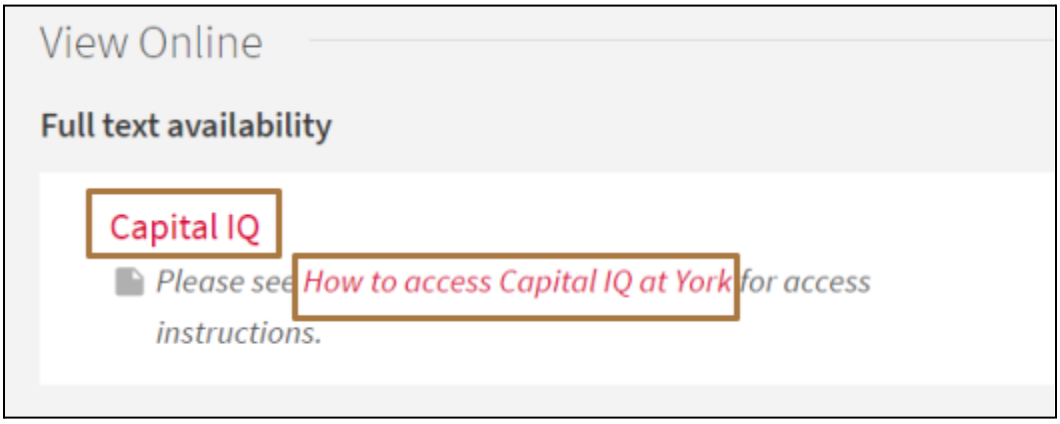
3. In the database record, scroll down to the **View Online** section. Click the **Capital IQ** link. You will be asked to enter your **Passport York** first, and then **Sign In** to Capital IQ using your Capital IQ login credentials. If you haven't done so already, please follow the instructions in the **How to access Capital IQ at York** link to **set up** your Capital IQ account.

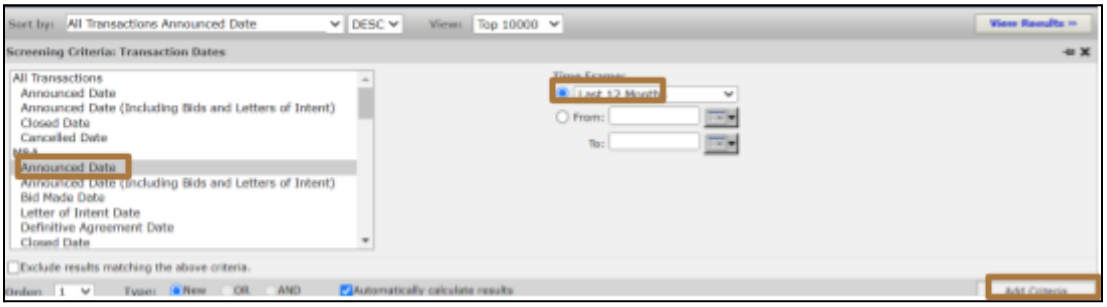



4. In Capital IQ, hover the **Screening** tab from the top Navigation bar and select the **Transactions** link.

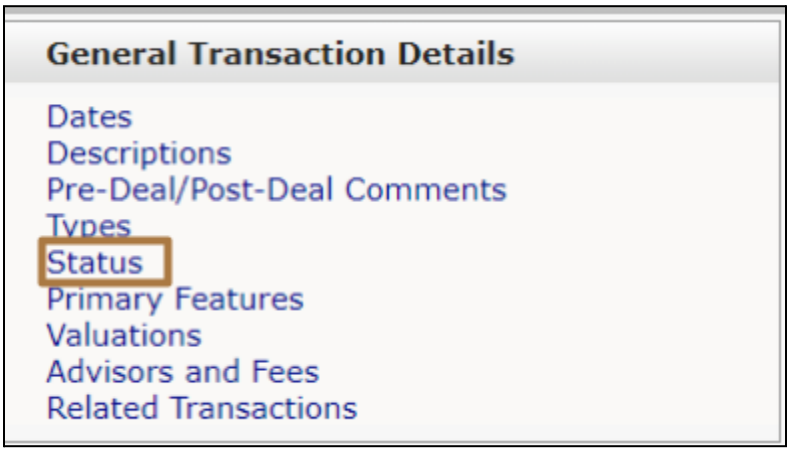
5. On the **Transaction Screening** page, set the Screening Criteria as below:

a. Within the **M&A Details** group, select the **Dates** link.

b. Select the **Announced Date** from the **M&A** list. Set the **Time Frame** as the **Last 12 Month**s. Click the **Add Criteria** button to apply the criterion.



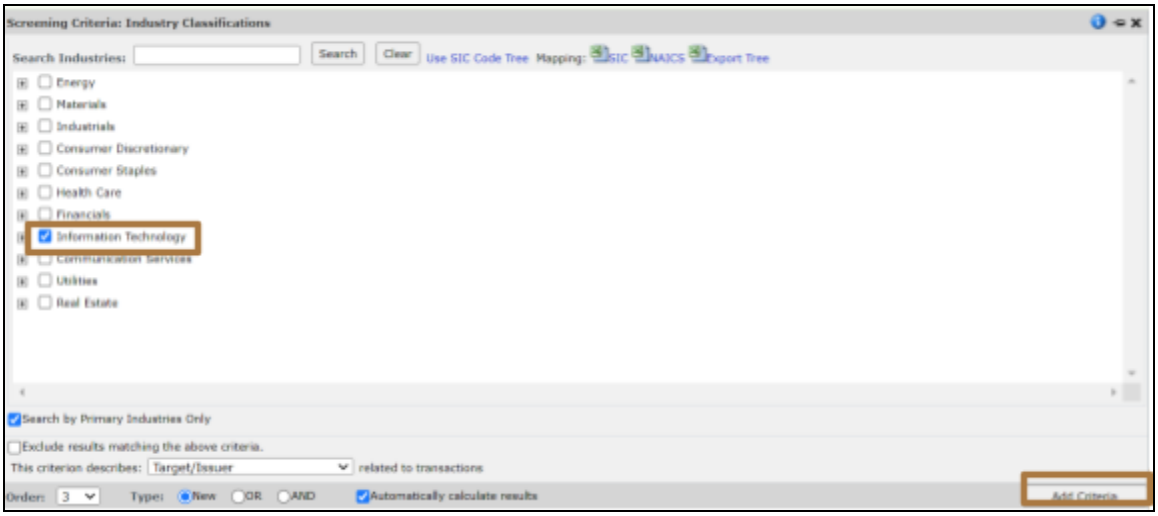

c. Within the **General Transaction Details** group, select the **Status** link.



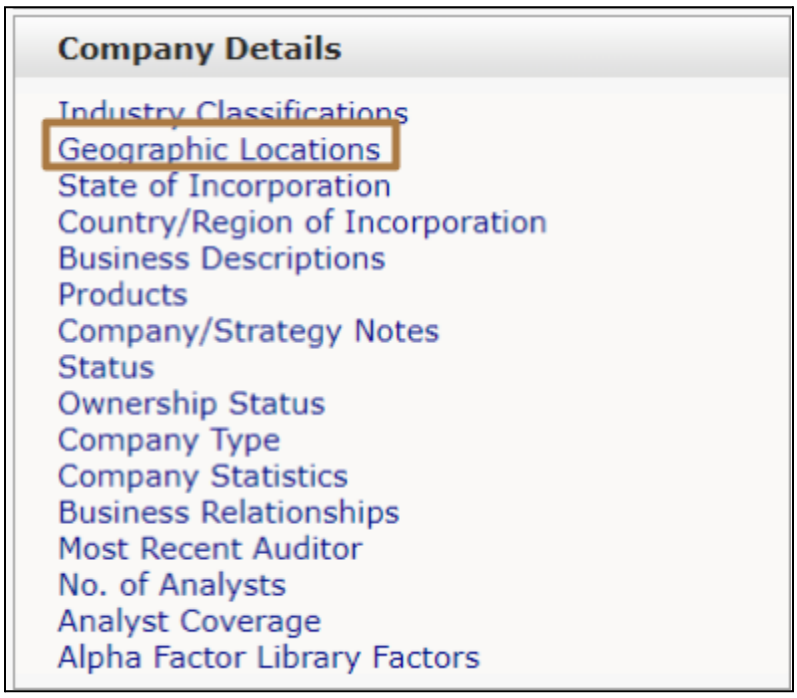
d. Select **Closed** in the **Available Items** list and click the **Right Arrow** to add it to the **Selected Items** list. Click the **Add Criteria** button to apply the criterion.

e. Within the **Company Details** group, click the **Industry Classifications** link**.**

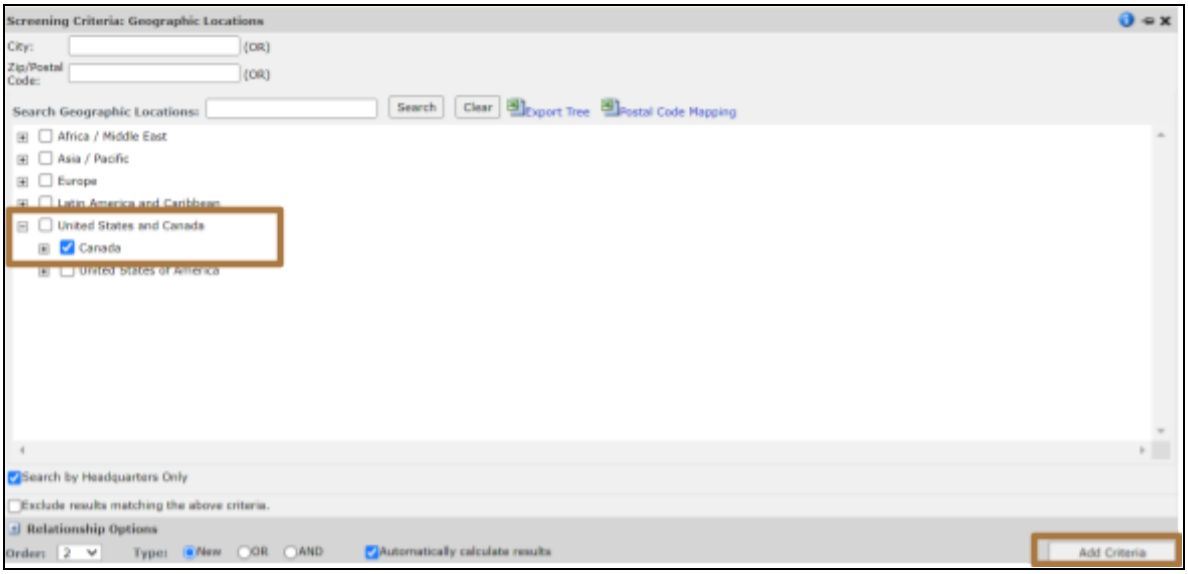
f. Check the **Information Technology** check box. Click the **Add Criteria** button to apply this criterion.



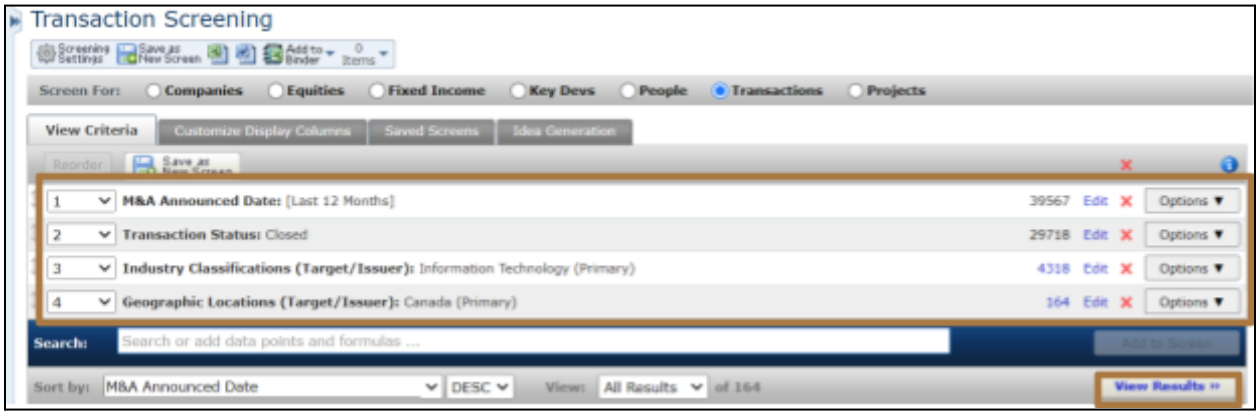

g. Within the **Company Details** group, click the **Geographical Locations** link.




h. Click the plus sign in front of **United States and Canada**, and check the **Canada** check box. Click the **Add Criteria** button to apply the criterion.




6. All the added criteria are listed at the top of the **Transaction Screening** page. Click the **View Results** button to view the M&A deals that meet all the added screening criteria. The results can be exported to Excel.




7. **Still need help?** Go to the [Ask Us page on the Libraries' website] to access our:

   - chat service
   - email help
   - in-person research help hours
   - or to book an in-depth research consultation with a librarian.