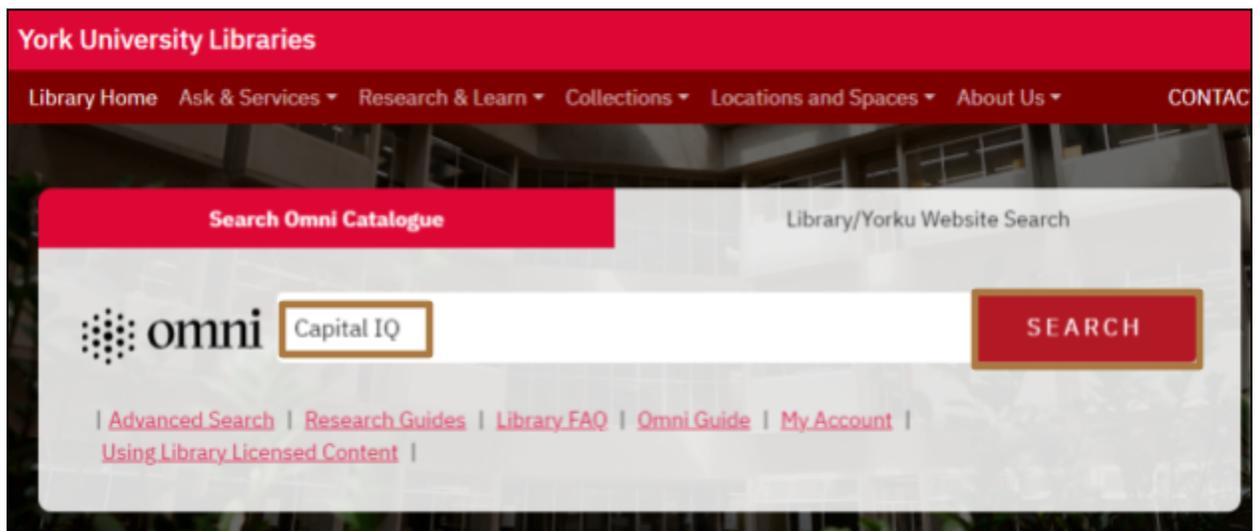


# Step-by-Step: Screening a List of M&As with Capital IQ

**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**.



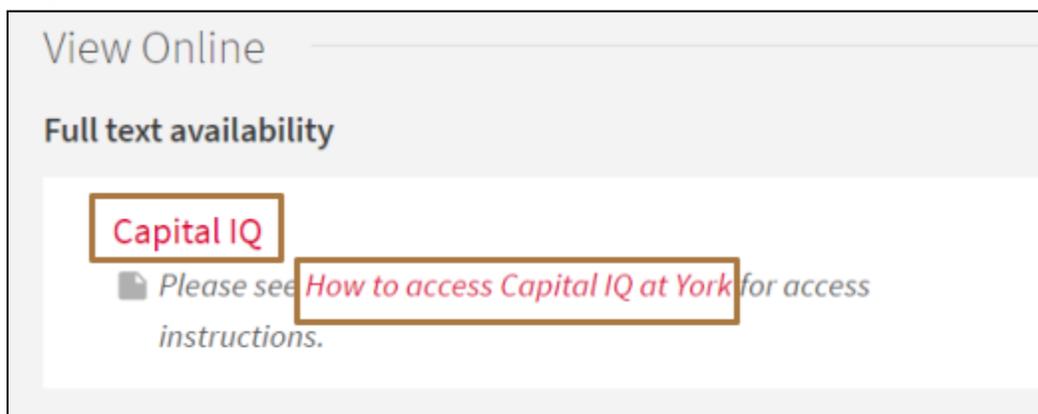
2. **Capital IQ** should be the first result in your search results list. Click **Available Online** in the record.



## Screening a List of M&As with Capital IQ

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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:

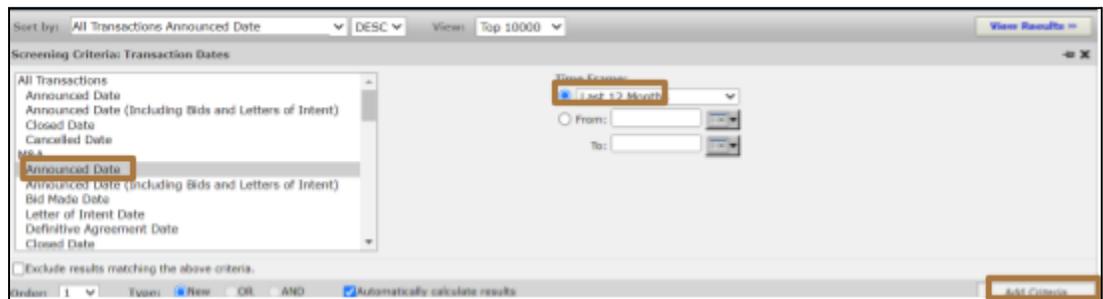
## Screening a List of M&As with Capital IQ

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- 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 Months**. Click the **Add Criteria** button to apply the criterion.



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



## Screening a List of M&As with Capital IQ

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- 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.



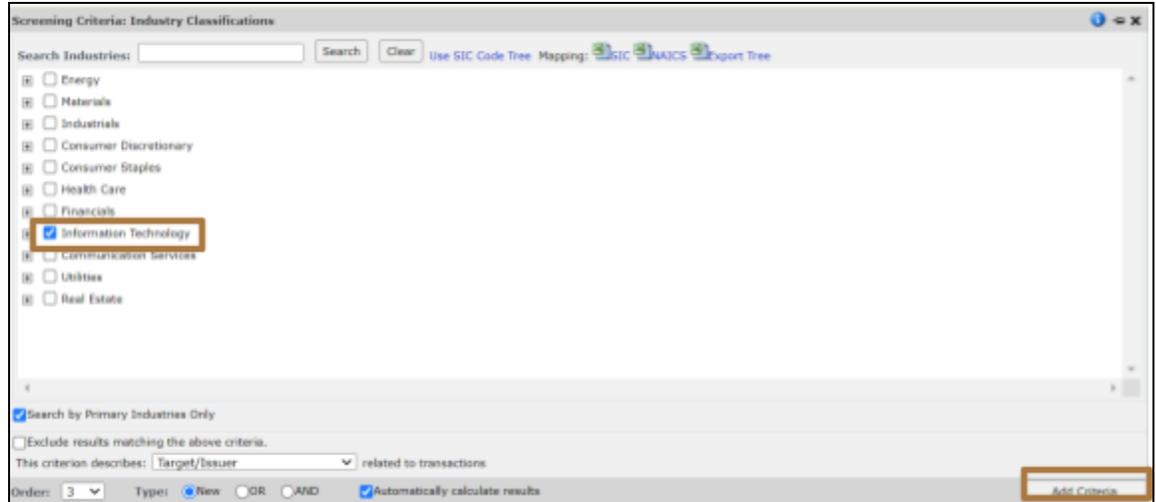
- e. Within the **Company Details** group, click the **Industry Classifications** link.



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

## Screening a List of M&As with Capital IQ

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- 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.

## Screening a List of M&As with Capital IQ

Screening Criteria: Geographic Locations

City:  (OR)

Zip/Postal Code:  (OR)

Search Geographic Locations:  Search Clear Export Tree Postal Code Mapping

- Africa / Middle East
- Asia / Pacific
- Europe
- Latin America and Caribbean
- United States and Canada
  - Canada
- United States of America

Search by Headquarters Only

Exclude results matching the above criteria.

Relationship Options

Order: 2 Type:  New  OR  AND  Automatically calculate results

Add Criteria

- 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.

Transaction Screening

Screen For:  Companies  Equities  Fixed Income  Key Devs  People  Transactions  Projects

View Criteria Customize Display Columns Saved Screens Idea Generation

Order	Criteria	Count	Edit	Options
1	M&A Announced Date: [Last 12 Months]	39567	Edit X	Options
2	Transaction Status: Closed	29718	Edit X	Options
3	Industry Classifications (Target/Issuer): Information Technology (Primary)	4318	Edit X	Options
4	Geographic Locations (Target/Issuer): Canada (Primary)	164	Edit X	Options

Search:  Add to Screen

Sort by: M&A Announced Date DESC View: All Results of 164

View Results

- 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.