## Step-by-Step: Screening a List of CEOs with Capital IQ

**Description:** The following example demonstrates how to generate a list of Canadian female CEOs within the Energy industry in Capital IQ.

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

<ul> <li>Locations and Spaces          <ul> <li>About Us</li> <li>CONTAC</li> </ul> </li> </ul>
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2. **Capital IQ** should be the first result in your search results list. Click **Available Online** in the record.

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2	Are We Getting SMARTER?	BOOK Are we getting smarter? : rising IQ in the twenty-first century Flynn, James R. (James Robert), 1934-2020, author. 2012 Bl Available at Scott Library Scott Stacks (BE 431 E565 2012)	"	* Q	
		<ul> <li>Available at Scott Library Scott Stacks (BF 431 F565 2012)</li> <li>Available Online</li> </ul>			

## libraries YORK

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.

View Online	
Full text availability	
Capital IQ Please see How to access Capital IQ at York for access instructions.	

4. In Capital IQ, hover the **Screening** tab from the top Navigation bar and select the **All Idea Generation Screens** link.

S&P Capital IQ	Sear	ch Compa	nies, People	e, Funds, a	nd More	
My Capital IQ	Companies	Markets	Screening	Charting	Coverage	Proje
Screening	Idea	Generati	on	Repor	ting	_
<ul> <li>Companies</li> <li>Quick Screen</li> <li>Equities</li> <li>Fixed Income</li> <li>Key Develope</li> <li>Key Develope</li> <li>Transactions</li> <li>Projects</li> <li>Projects/Port</li> <li>Saved Screen</li> <li>Saved Temple</li> </ul>	<ul> <li>Inverter</li> <li>Inverter</li> <li>PE/</li> <li>Contents</li> <li>Scression</li> <li>New</li> <li>Cression</li> <li>All</li> <li>folios</li> <li>Targenets</li> <li>Fin</li> </ul>	estment Ba estment Ma VC porate eening Lite w and News dit Ratings Idea Gener eting d Buyers or	anking anagement sworthy ation Screens	<ul> <li>Screet</li> <li>Compa</li> <li>Creat</li> <li>Creat</li> <li>Creat</li> </ul>	ning Reports arable Analy e - Companie e - Transactie e - Fixed Inc	ysis es ons come

5. In the **Idea Generation Screens** page, select the **People** link. The second screen, **Female CEOs - Choose Geography and Title** is relevant to our search.

Ide	dea Generation Screens		
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Scr	Screens		
Sea	Search Screen Names and Descriptions	Go	
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(H)	Professionals who are on the Board of Another Company - Choose Industry and Geo     Professionals With Uncoming Engine Lock-Up Bariade	graphy v	Person
+	University/College Alumni - Current C-Suite	Ĵ	Person
Viewi	iewing 1-7 of 7		

**Tip:** You can locate relevant screen templates by inserting keywords in the search bar based on names and descriptions.

6. Click the plus sign beside your chosen screen, i.e. **Female CEOs - Choose Geography and Title**. Click the **View Additional Details** link to see details of the screen.

S	reer	8	
Se	earch	Screen Names and Descriptions Go	
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8	Fe	nale CEOs - Choose Geography and Title 🛛 😪 8	Person
		Professional Job Functions (Current Professional Record) (Current Matching Results): Chief Executive Officer (Current Functions Only)     Geographic Locations (Current Professional Record) (Current Matching Results): Europe (Primary)     Biographies: Kayword: "she" OR "ms." OR "ms."     Biographies: NOT ( Keyword: "me." OR "him" OR "him")     Hitional Display Columns: Professional Titles [Any Professional Record] [Current Matching Results]: Professional Job Functions [Any Professional Record] [Current Matching Results]: Store (Store Store) [Current Matching Results]: Store (Store) [Current Matching Results	st Matching Results]; Geographic
18	H	h-Net Worth Professionals/Board Members 😔 🖬	Person
Œ	Mc	tt Highly Compensated Key Executives 😔 🗸	Person
Œ	Pr	fessionals who are on the Board of Another Company - Choose Industry and Geography 🛷 🕫	Person
Ŧ	Pr	fessionals With Upcoming Ending Lock-Up Periods 🛛 👻 🖡	Person
	Ur	versity/College Alumni - Current C-Suite 🛛 🗸 🗸	Person

7. Click the screen name to go to this **Person Screening Female CEOs - Choose Geography and Title** screen page. Tailor the screening criteria accordingly.



a. Click the **Edit** link to the right of the **Geographic Locations** criterion. Uncheck the **Europe** check box. Click the plus sign in front of the United States and Canada, and check the **Canada** check box. Click the **Update** button to apply the change.

Professional Job Functions (Current Professional Record) (Current Matching Results): Chief Executive Officer (Current Functions Only)	332944 Edit X Options ▼
Geographic Locations (Current Professional Record) (Current Matching Results): Europe (Primary)	70544 Edit K Options V
Screening Criteria: Geographic Locations	• • • • • • • • • • • • • • • • • • •
Search Geographic Locations: Search Clear Scyport Tree Sostal Code Mapping	
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Curope     Catin America and Caribbean	
Canada	
4	
Search by Headquarters Only	
Exclude results matching the above criteria.	
This criterion describes: Current Professional	
Search the other records of the professionals in my results learn more	
	Update

b. In the Company Details group, select the Industry Classifications link.



c. Check the **Energy** check box and click the **Add Criteria** button to apply this criterion.

Screening Criteria: Industry Classifications	<b>0</b> -= x
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Energy	^
E Industrials	
Consumer Discretionary	
Consumer Staples	
B Health Care	
Financials	
Information Technology	
Communication Services	
Utilities	
Real Estate	
4	
Search by Primary Industries Only	
Exclude results matching the above criteria.	
This criterion describes: Any Professional Record V	
Gearch the other records of the professionals in my results learn more	
Order: 5 V Type: New OOR OAND ZAutomatically calculate results	Add Criteria

8. At the top of the **People Screening Female CEOs - Choose Geography and Title** page, all the criteria are listed under the **View Criteria** tab. Click the **View Results** button to view the people that meet all the listed screening criteria. The results can be exported to Excel.

Screen For	Companies Equities Fixed Income Key Devs People Transactions Projects				
View Crite	ria Customize Display Columns Saved Screens Idea Generation				
Reorder	RIMA		_	×	
1 *	Professional Job Functions (Current Professional Record) (Current Matching Results): Chief Executive Officer (Current Functions Only)	332944	Edit	×	Options
2 *	Geographic Locations (Current Professional Record) (Current Matching Results): Canada (Primary)	17688	Edit	×	Options
3 4	Biographies: Keyword: "she" OR "mrs." OR "ms."	1199	EdR	×	Options
4 ¥	Biographies: NOT ( Keyword: "mr." OR "him" OR "his" )	1117	Edit	×	Options
5 ¥	Industry Classifications (Any Professional Record) (Current Matching Results): Energy (Primary)	21	Edit	×	Options

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