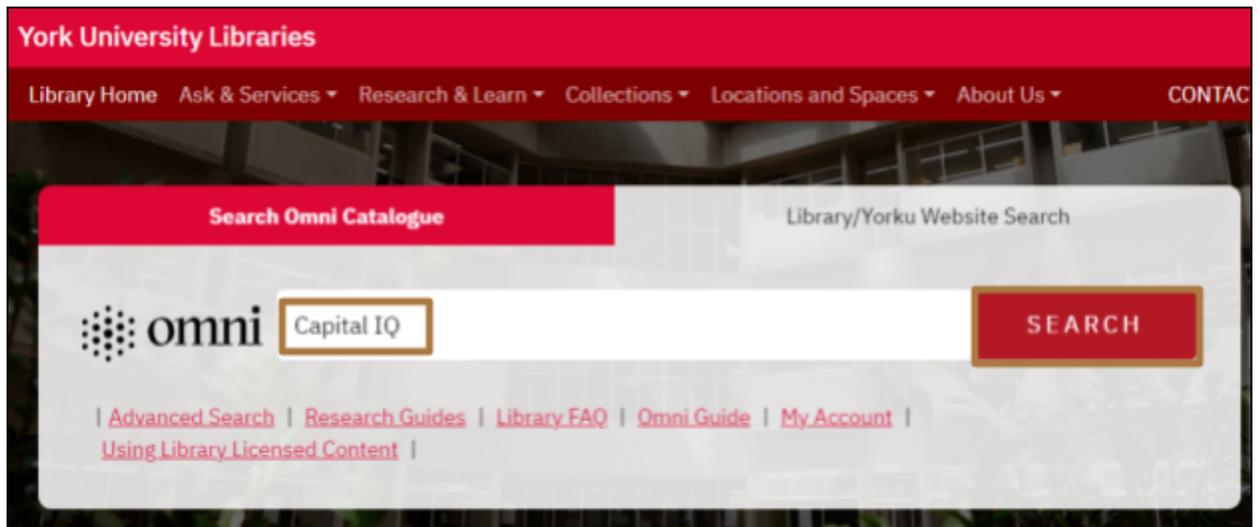


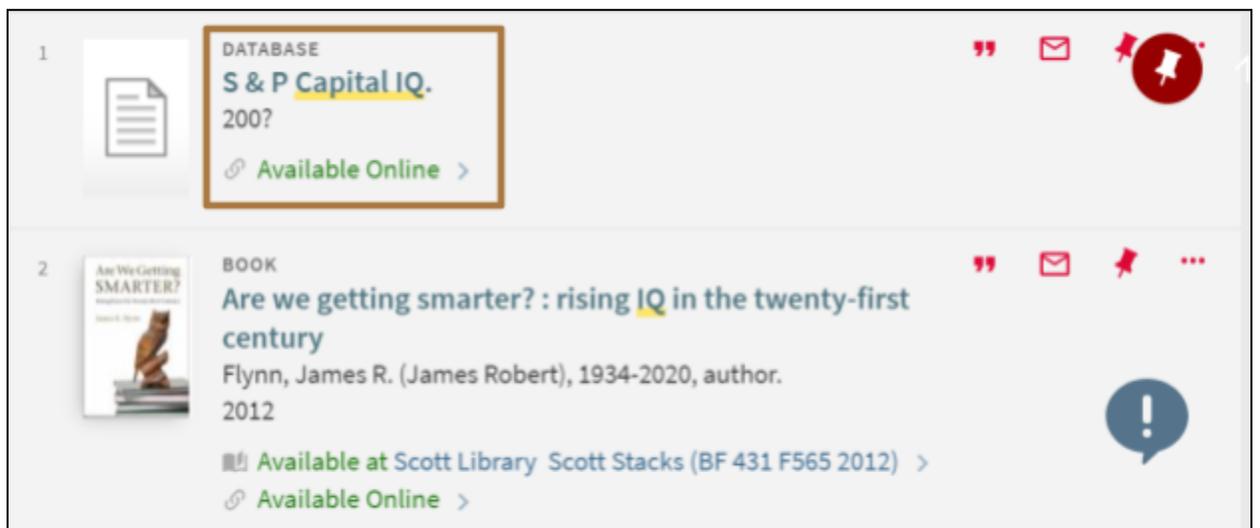
# Step-by-Step: Screening a List of CEOs with Capital IQ

**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 [York University Libraries' homepage](#). type **Capital IQ** into the Omni search bar, and click **Search**.



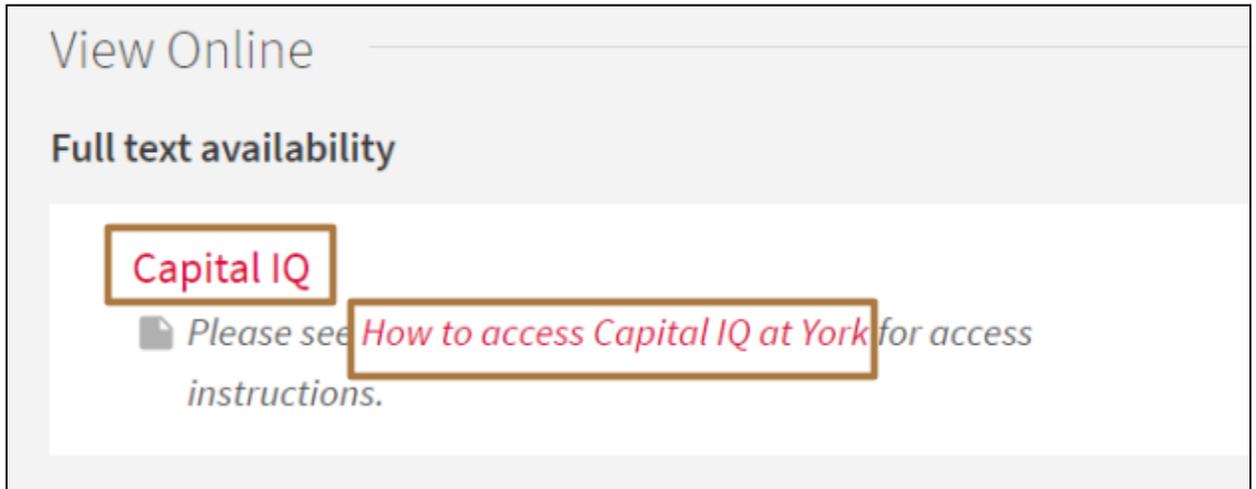
2. **Capital IQ** should be the first result in your search results list. Click **Available Online** in the record.



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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 **All Idea Generation Screens** link.



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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.

The screenshot shows the 'Idea Generation Screens' interface. On the left is a navigation menu with categories like 'Investment Banking', 'Investment Management', 'PE/VC', 'Corporate', 'Screening Lite', 'New and Newsworthy', and 'Credit Ratings'. The main area displays 'All Idea Generation Screens' with a list of categories: Companies (224), Equities (9), Fixed Income (13), Key Developments (15), People (14), Transactions (36), and All Credit Ratings Screens (3). The 'People (14)' link is highlighted with a red box. Below this is a 'Screens' section with a search bar and a table of screen templates. The table has columns for 'Screen Name' and 'Screen Type'. The screen 'Female CEOs - Choose Geography and Title' is highlighted with a red box.

Screen Name	Screen Type
CEOs with Postgres	Person
<b>Female CEOs - Choose Geography and Title</b>	Person
High-Net Worth Professionals/Board Members	Person
Most Highly Compensated Key Executives	Person
Professionals who are on the Board of Another Company - Choose Industry and Geography	Person
Professionals With Upcoming Ending Lock-Up Periods	Person
University/College Alumni - Current C-Suite	Person

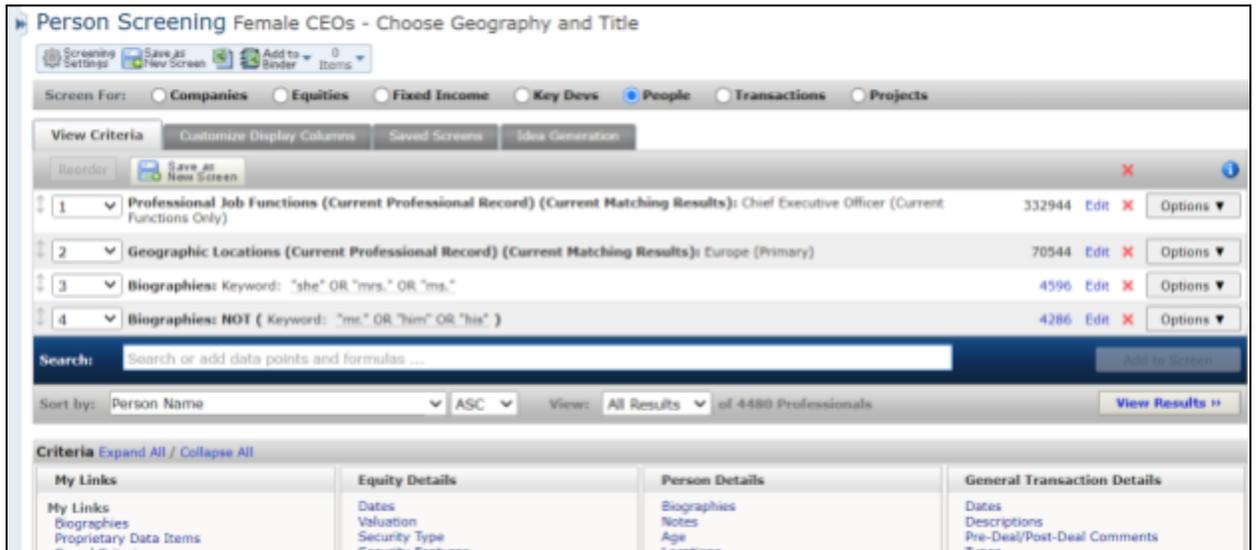
**Tip:** You can locate relevant screen templates by inserting keywords in the search bar based on names and descriptions.

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.

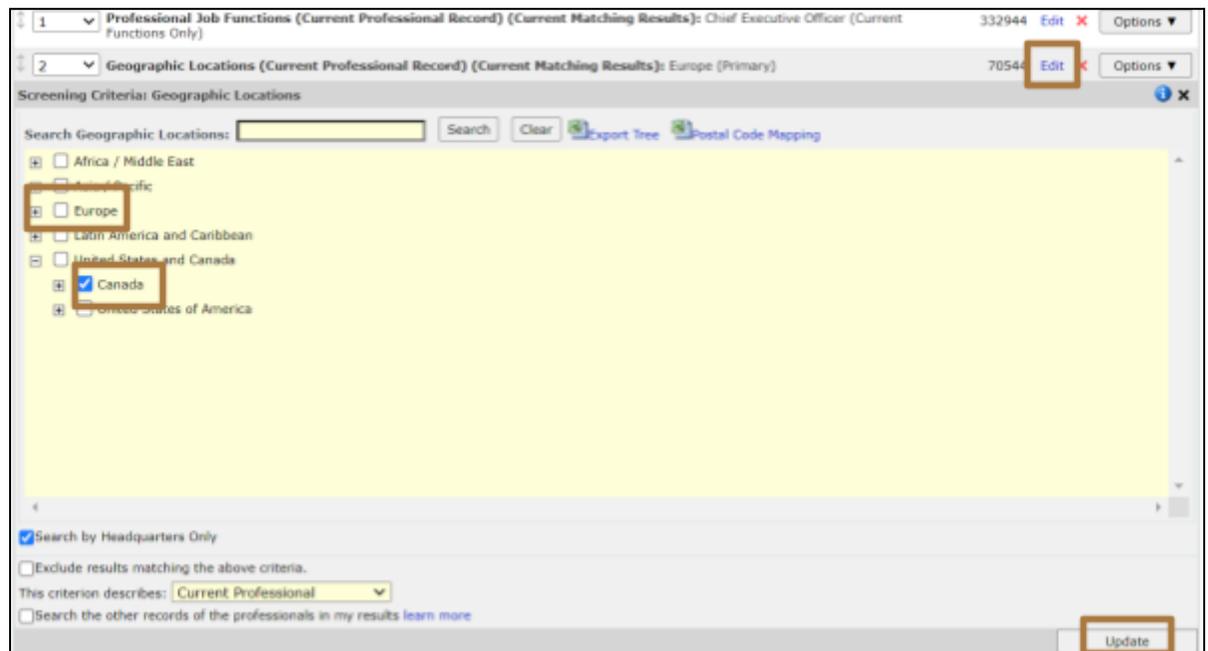
This screenshot shows the details for the 'Female CEOs - Choose Geography and Title' screen. The screen is expanded, showing a list of criteria and filters. The criteria include: 1. Professional Job Functions (Current Professional Record) (Current Matching Results): Chief Executive Officer (Current Functions Only); 2. Geographic Locations (Current Professional Record) (Current Matching Results): Europe (Primary); 3. Biographies: Keyword: "she" OR "mrs." OR "ms."; 4. Biographies: NOT ( Keyword: "mr." OR "him" OR "his"). Below the criteria, there is a section for 'Additional Display Columns' and 'Last Run Count: 4283 (as of Aug-07-2024)'. The 'Female CEOs - Choose Geography and Title' screen is highlighted with a red box.

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



- 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.



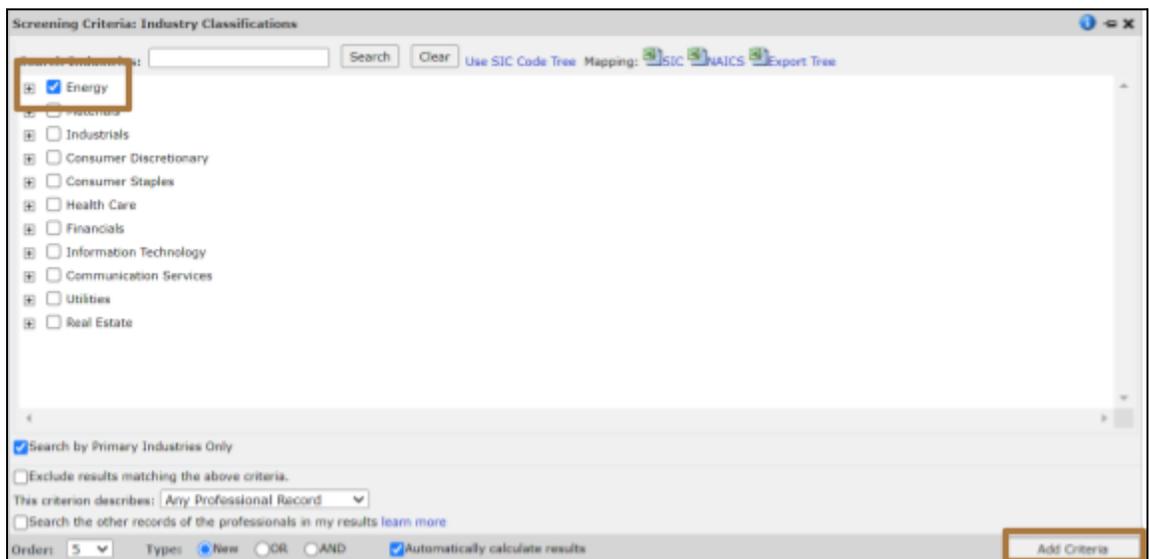
- In the Company Details group, select the Industry Classifications link.

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



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.

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Person Screening Female CEOs - Choose Geography and Title

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

View Criteria: Customize Display Columns | Saved Screens | Idea Generation

Criteria	Current Matching Results	Count	Actions
1 Professional Job Functions (Current Professional Record) (Current Matching Results): Chief Executive Officer (Current Functions Only)	332944	Edt X	Options ▼
2 Geographic Locations (Current Professional Record) (Current Matching Results): Canada (Primary)	17688	Edt X	Options ▼
3 Biographies: Keyword: "she" OR "mrs." OR "ms."	1199	Edt X	Options ▼
4 Biographies: NOT ( Keyword: "me," OR "him" OR "his" )	1117	Edt X	Options ▼
5 Industry Classifications (Any Professional Record) (Current Matching Results): Energy (Primary)	21	Edt X	Options ▼

Search: Search or add data points and formulas ...

Sort by: Person Name | ASC | View: All Results | of 23 Professionals

[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.