Advanced Search

The Advanced Search allows you to specify a wide range of textual and financial criteria to be searched for.

These criteria are textual or numeric information within the data stored on companies. Multiple criteria can be set, combined with "AND" or "OR", for even greater refinement in searches.

Building the list of search criteria you wish to use is a multiple step process which is broken up into three sections.

Description of Sections

Section 1  Select Target Universe: Check-off the company databases to be searched.
Select from any of the available Mergent Databases:

- **US Company Universe**: Active publicly traded US companies
- **US Company Archive**: Public US companies that have merged, were acquired or went bankrupt since 1995.
- **International Universe**: Non-US publicly traded companies
- **International Archive**: Public Non-US companies that have merged, were acquired or went bankrupt since 1995.
- **Private Company Database**: Private company reports from the Experian National Business Private Company Database.

Or you can Search within smaller subsets of these databases:

- **Standard Screens**: (Coming Soon)
- **Comparison List**: Search within the list of companies you have stored in your Company Analysis List.
- **Index**: Select one of over 40 major publicly traded company indices.

**Note**: Depending on your subscription, various database names will be available for selection.

Section 2  Select Data Category: Build your search criteria to find a list of companies that match.
As a criterion is being built it appears in the Search Build box at the bottom of this section. At any point during the building of a criterion you can select the Undo button to back up a step.

1. **Category**: Choose one of six categories to find a data point to use in your search criteria:

- **Executives**: Search by Officer or Director's name
- **Financials**: Select from the available financial items
- **General Company Information**: Choose data items about the company and its employees.
• **Industry Codes**: Allows Industrial Classification items (SIC & NAICS) to be selected.

• **Ratios**: Select from the available financial ratios.

• **Textual search**: This allows a search to be made within the Business, History, Joint Ventures and Property information for the company.

2. **Data Points**: Choose from any of the available Data Points to search on.

3. **Operators**: Based on the Data Point selected certain operators become available. Choose one of the available operators to perform on the criteria. With **Financials** or **Ratios** the **Year** drop down menu becomes available to select the year that value will be searched for.

4. **Search Value**: Enter the value to be searched on. Either type the value into the field or use one of the following shortcuts:
   a. **Number Pad**: You can use the number pad to enter numerical values into the **Search Value** field.
   b. **Look-ups**: Certain data points have a limited number of possible Search Values or use special codes. When these Data items are selected a list of options appears above the **Search Value** field where you can select the appropriate value you want.

5. **Logic**: The 'AND' &/or 'OR' buttons become available after entering your Search Value. After selecting one of these buttons either repeat steps 3 & 4 above to define a range for the criteria's value or repeat Steps 1 through 4 to add another data point to the criterion.

6. **Add button**: Click this to add the criteria created in the **Search Build** box to the **Search Criteria** box in Section 3.

**Section 3 Search Criteria**: Lists the Criteria that have been built in Section 2. Lists the criteria that have been built.

**Note**: Each new line of criteria listed in this section is searched for with an 'AND' operator between them. From this section you can:

• **Run Search** button: Submits the search to bring up results for companies that match the criteria entered.

• **Remove** button: Select a line of criteria in the text box above to highlight it then click on this button to remove it.

• **Edit** button: Select a line of criteria in the text box above to highlight it then click on this button to put the criteria back to Section 2 where it is then possible to edit it.

• **New Search** button: Clears out all the criteria in the text box above so you can start building a new search.

**To Build Search Criteria**

1. If necessary, choose the **New Search** button in the **Search Criteria** section to remove search criteria that you may have defined previously.
2. Select the databases you wish to search by setting the check box in front of their names. The five available databases contain data for active and inactive US and International companies, and Private companies or you may choose to search within the companies you stored in the Company Analysis List or companies listed in an Index.

3. In the Select Data Category section, use the down arrow at the right of the Category box to display a list of the categories available.

4. Select the category required. This will populate the data point list with the appropriate items.

5. Use the scroll bar at the right of the Data Point box to display the list of data points available.

6. Select the Data Point required. This will update the availability of the buttons in the Operators group. Only some of these are appropriate for each data point. Note: When financials or ratios are select the Year drop-down menu becomes available to select a specific year for that data point. Note: Only those items marked with an asterisk can be selected for searches in the Private Company Database.

7. In the Operator group of buttons, select the button of the condition you wish to use in the criterion.

8. In the Search Value box, enter the value(s) you wish to use with the criterion item. In most cases this will need to be a complete value for the item, but in the case where the condition is ‘Contains’, as it is for a text item, it can be a partial value. When typing numeric values, you can use ‘t’ for 1,000, ‘m’ for 1,000,000 and ‘b’ for 1,000,000,000. The number pad becomes available for data items that have numerical criteria associated with them. When entering industry and geographic code values the tables become available above the Search Value field.

9. Select the ‘AND’ or ‘OR’ buttons after entering your Search Value to either define a range of criteria or add another criteria to your criterion. After selecting one of these buttons either repeat steps 7 & 8 above to define a range for the criteria’s value or repeat Steps 2 through 8 to add another data point to the criterion.

10. Choose the Add button at the bottom of Section 3. This will add the complete criterion to the list box in Search Criteria section.

11. Repeat step 2 to 10 to define any other criteria you wish to specify.

12. If you have specified more than one criterion in the Search Criteria text box each criterion will be search for with an AND operator between them. Note: to search for one criteria OR a second criteria you have to include the OR while building the criterion in Section 2. (Steps 3 through 9 above.) Remember that AND tends to narrow a search (i.e. produce fewer results) and OR widen it (more results).

13. To remove a criterion that is not required, select it in the Search Criteria list box and choose the Remove button. Note: to edit a criterion you have to select it in the Search Criteria list box then click on the Edit button. The criterion will be placed back into Section 2 where you can undo your changes working right to left on the criterion.

14. When ready, choose the Search button to start the search for companies satisfying the criteria specified. This will take you to the Search Results page.

Save Advanced Search Criteria
You can save the Advanced Search criteria you build for use during future logons.

1. Build the search criteria required and make sure all the criteria are set in Section 3, the Search Criteria box.
2. Click on the "Save Search" button.
3. Enter your Email Address, then click the "Set Email" button.
   **Note:** Entering your Email address creates a personal account for you to save search criteria in. You will have to enter the same Email address to load your criteria on subsequent logons. (You should only have to set your Email once per session.)
4. Enter a name for your search criteria and click on the "Save As" button to save it.
   **Note:** If you want to over-write a previously saved criterion, click on the criterion's name.

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**Using Saved Searches**

Each search you create during a Mergent Online session is saved automatically and appears at the bottom of the Advanced Search page, under box 3. The time at which you first carried out the search is used as its name. Each entry in the Previous Searches list has two parts:

- **Time:** The time at which the search was run.
- **Criteria:** Shows the criteria used for that search.
  
  - Clicking on the criteria for a previous search reloads that search into Box 3 of the Advanced Search page. From there you can rerun the search or edit any of the lines of criteria to alter your previous search.

To remove all the recent searches from the list, choose the Clear Search History link on the top right of this section.

**Note** The searches are only available for the current session and cannot be saved for use in a future session. They will also be lost if a timeout occurs during a session.