Inside-Out:
Complete Administration Reference Guide for Academic Dow Jones Factiva.com

Inside-Out: Administration

Logging into Factiva.com as an administrator

Access into your general *Factiva.com* account is always via IP range and users simply click on the link provided on your library web page.

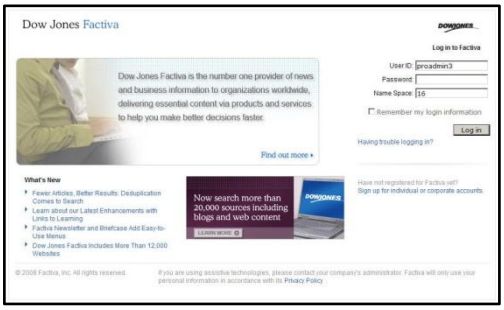
To log in as a *Factiva.com* administrator you need a user ID and password which will have been e-mailed to you at the start of your subscription. If you do not have a password please contact ProQuest:

- U.S. and Canada: customer_service@proquest.com
- UK, Europe, Middle East, Africa, Asia, Latin America: customerservice@proquest.co.uk

To login:

- Go to *www.Factiva.com.*
- Mouse over *Login to Factiva* in the top right-hand corner of the page.
- Select *Factiva.com* from the list.

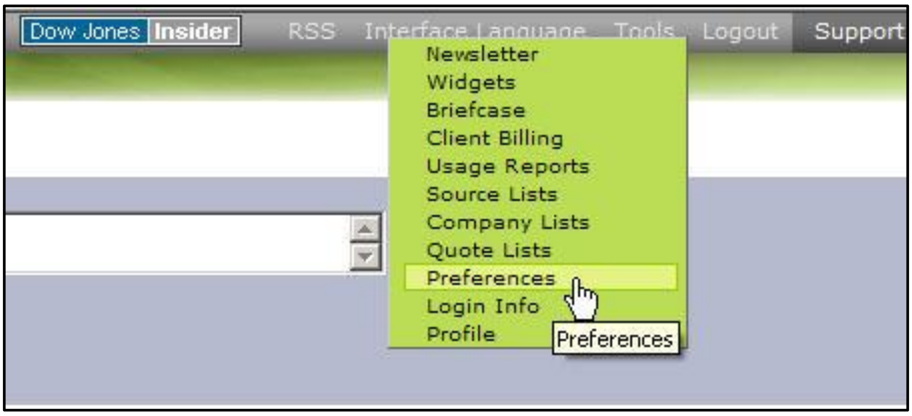
You will arrive at a login screen where you can enter your administrator ID and password



Preferences

This area allows you to personalize a variety of settings that determine how *Factiva.com* is presented to users. For instance, you can establish a home page, change the default sources you search, change the size of the search box, choose to display indexing codes, set the default content language, or choose to default to the Search Builder or Simple Search. **NOTE: End users have the ability to change preferences as well.**

The Preferences area can be found under Tools on the *Factiva.com* toolbar.



The Preferences section allows you to determine settings in the following areas:

- General Preferences
- Search & Alert
- News Pages
- Quotes & Market Data
- Password

On the following pages, you will find highlighted screen shots for each of the above sections that contain recommendations for settings.

NOTE: Factiva.com was originally created as an individual user resource and so preferences can be altered by users. We suggest that you include a note in any internal instructions you may create for users stating what the default preference settings should be.

Key:

Recommended setting

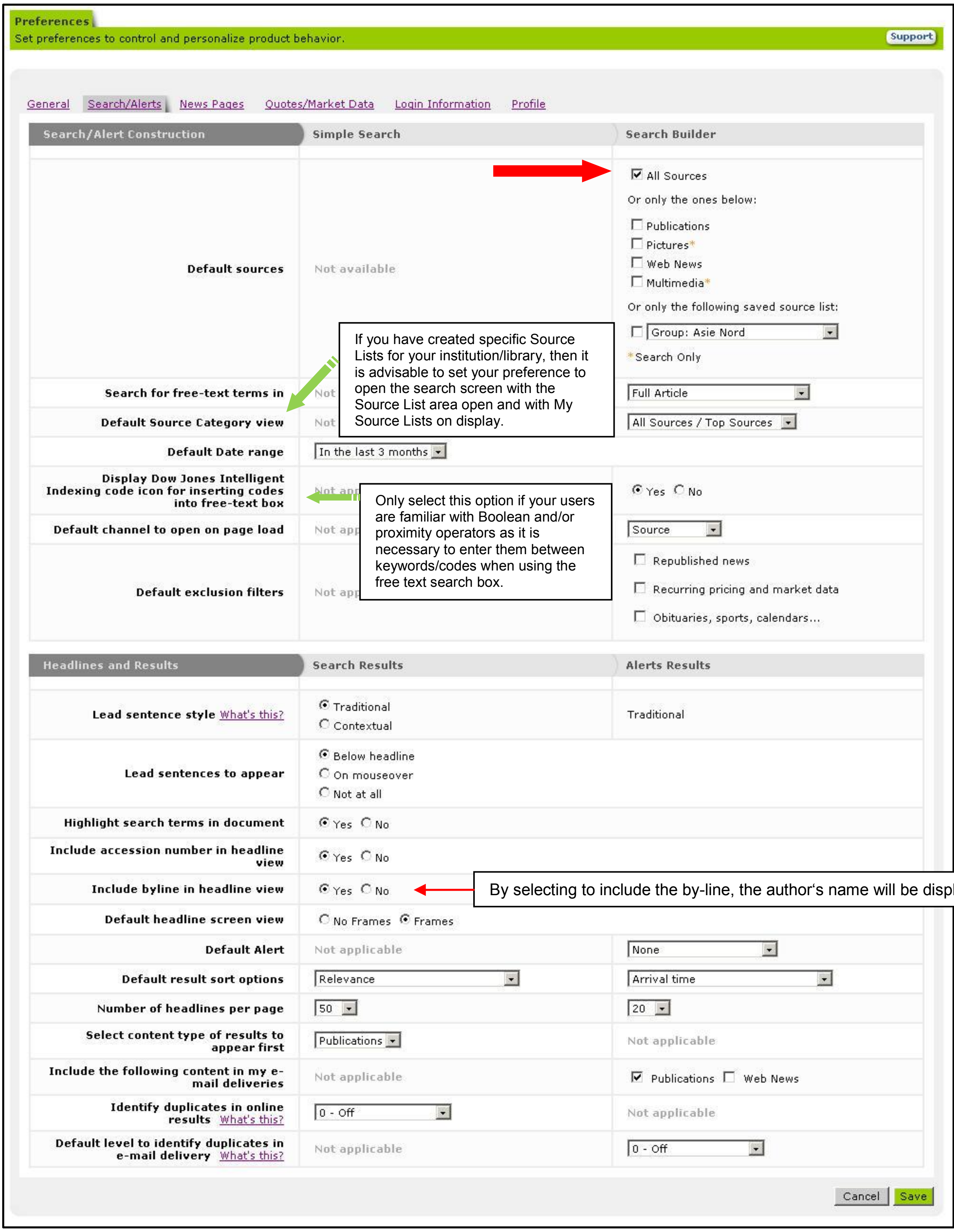
Information provided so you can choose the most appropriate setting according to the needs of your institution/library

General Preferences

Here, you can set general preferences for your *Factiva.com* account including date and time, default page upon logging in and default content language.

Search and Alert

Here you can set search preferences including restricting searches to particular sources or source types (e.g. publications or web news only) and enabling the Dow Jones Intelligent Indexing™ icon for inserting codes into the free text search box. You can set a default date range in which to search, or choose a default Alert.


Preferences
Set preferences to control and personalize product behavior.
Support

General | Search/Alerts | News Pages | Quotes/Market Data | Login Information | Profile

Search/Alert Construction	Simple Search	Search Builder
Default sources	Not available	☑ All Sources Or only the ones below: ☐ Publications ☐ Pictures* ☐ Web News ☐ Multimedia* Or only the following saved source list: ☐ Group: Asie Nord *Search Only
Search for free-text terms in	Not	Full Article
Default Source Category view	Not	All Sources / Top Sources
Default Date range	In the last 3 months	
Display Dow Jones Intelligent Indexing code icon for inserting codes into free-text box	Not app	◉ Yes ○ No
Default channel to open on page load	Not app	Source
Default exclusion filters	Not app	☐ Republished news ☐ Recurring pricing and market data ☐ Obituaries, sports, calendars...

Headlines and Results	Search Results	Alerts Results
Lead sentence style What's this?	◉ Traditional ○ Contextual	Traditional
Lead sentences to appear	◉ Below headline ○ On mouseover ○ Not at all	
Highlight search terms in document	◉ Yes ○ No	
Include accession number in headline view	◉ Yes ○ No	
Include byline in headline view	◉ Yes ○ No	
Default headline screen view	○ No Frames ◉ Frames	
Default Alert	Not applicable	None
Default result sort options	Relevance	Arrival time
Number of headlines per page	50	20
Select content type of results to appear first	Publications	Not applicable
Include the following content in my e-mail deliveries	Not applicable	☑ Publications ☐ Web News
Identify duplicates in online results What's this?	0 - Off	Not applicable
Default level to identify duplicates in e-mail delivery What's this?	Not applicable	0 - Off

Cancel | Save

If you have created specific Source Lists for your institution/library, then it is advisable to set your preference to open the search screen with the Source List area open and with My Source Lists on display.

Only select this option if your users are familiar with Boolean and/or proximity operators as it is necessary to enter them between keywords/codes when using the free text search box.

By selecting to include the by-line, the author's name will be displayed.

News Pages

Here you can choose to default to a specific Group or Factiva News Page.

Personal News Pages are not relevant to academic accounts

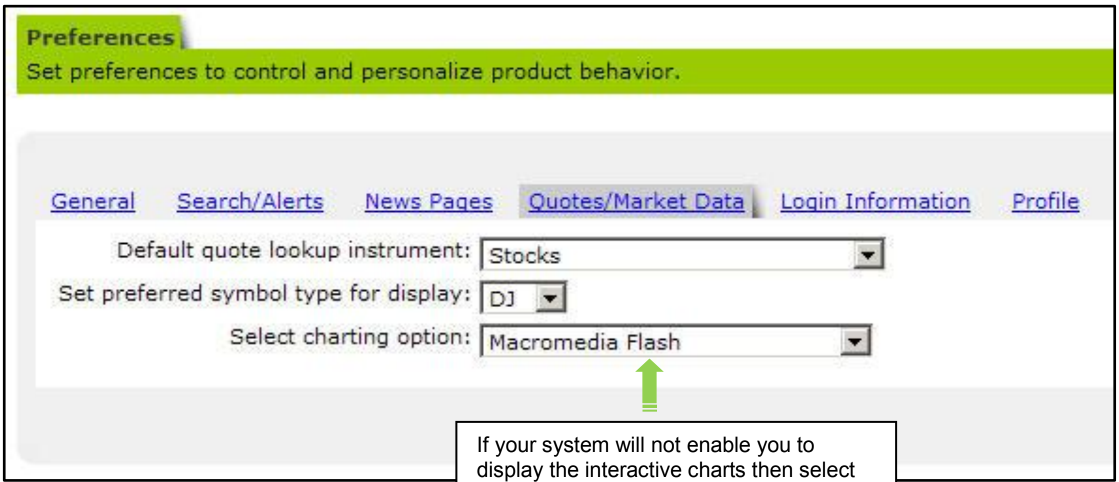
If you have set up **Group News Pages** specific to your institution/library you may want one of these to be automatically on display as users open the **News Pages** within Factiva.com.
To do this:

1. Select **Group News Pages** from the top drop-down menu.
2. From the menu titled **Default Group News Pages** select one of the **Group News Pages** you have created.

You can also select which **Factiva News Page** opens by default when a user clicks on **Factiva News Pages**. You can choose a geography-specific or industry-specific **News Page**.

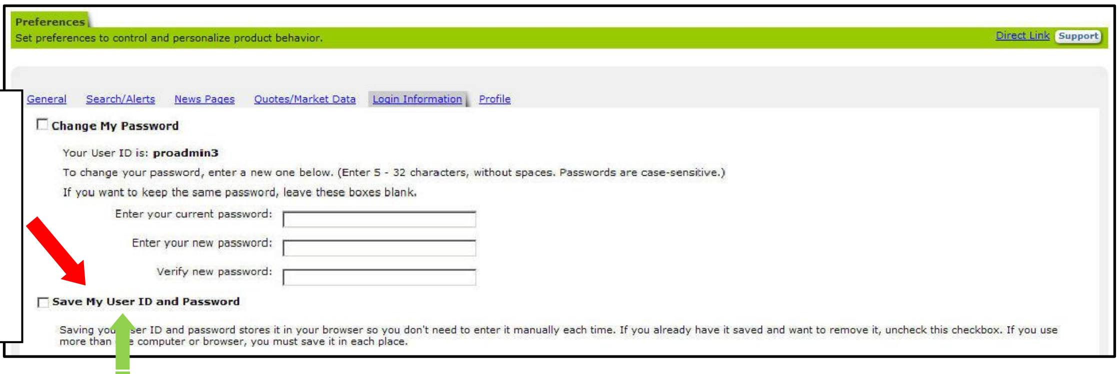
Quotes and Market Data

You can set a default quotes instrument and choose between charting options of Macromedia Flash or Portable Network Graphic (PNG).



If your system will not enable you to display the interactive charts then select PNG rather than Macromedia Flash.

Password



If you would like to save the ID and password in your browser so you do not need to enter it manually each time select this option.

NOTE: If you are logging in as an administrator from a front desk or a user's computer that we recommend that you do not save your ID and password. To ensure your user ID and password are not saved do not select this option.

Alerts

Creating a Group Alert

Alerts can only be created using the administrator login. Five Alerts per institution can be created and twenty-five can be created per consortium.

1. Select the Alert tab at the top of the interface.
2. Click on *Manage Group Alerts*.

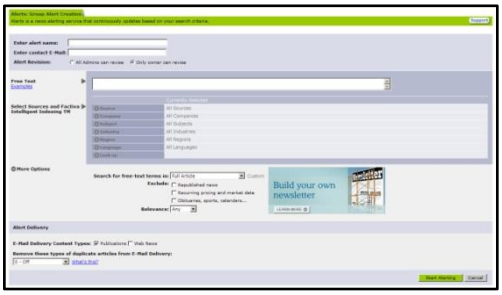
NOTE: When opening the Manage Group Alerts page you will see three options, Subscribable Alerts, Assigned Alerts, and Unpublished Alerts. Subscribable Alerts are not available to Academic subscribers.

3. Select the *Create new alert* link.
4. Name the Alert (up to 25 characters) in the “Enter Alert Name” box.
5. Enter a contact e-mail address who will serve as the Alert owner and determine if the alert can be revised by any Administrator or the Alert owner. Note: this is the e-mail address of the administrator not the address that results are e-mailed to. Note also that due to the way in which academic accounts are set up, it is not possible for *Factiva.com* to mail out alert results.
6. Add Dow Jones Intelligent Indexing™ terms by clicking on the desired industry, region, subject or company terms, or use the *Look Up* tab to find terms. Add further free-text terms if required in the free text search box and click on *More Search Options* to select other criteria, such as exclusion features and relevance.
7. Relevance is a measure of how closely documents match the terms you enter. Alerts use a complex algorithm to calculate a relevance score between one and 100 for each document. The score reflects how well the article matches the search criteria for that Alert.

How Relevance Works
The relevance score is a combination of three factors:

- The number of terms included in the query and how many of the search terms are found in a document
  - For example, Alert 1 contains the terms “software or computer,” and Alert 2 contains “software or computer or internet.” The relevance score for a given document containing the terms “software” and “internet” would be lower for Alert 1, because the document satisfied only one “evidence” of terms in Alert 1 (i.e. software) and two “evidences” of terms in Alert 2 (i.e. software and internet).
- The number of times any term appears in an article
  - For example, if one of the free text terms is “Airbus,” an article containing that term multiple times would score higher than an article containing it only once.
- The word count of a document
  - For example, if “De Beers” appears twice in a document with 100 words and twice in an item with 300 words, the first document will receive a higher score. The longer the article, the more times a search term needs to appear to receive the same score.

8. Specify whether you want your results to have a high degree of relevance (a score of 85 or above), a medium degree of relevance (75 or higher) or any degree of relevance (any score). The default is to search for items with a high degree of relevance.
9. To change your relevance option, go to the “Relevance” pull-down on the “Alert Creation” screen and select High, Medium or Any.
10. Click *Start Alerting*.



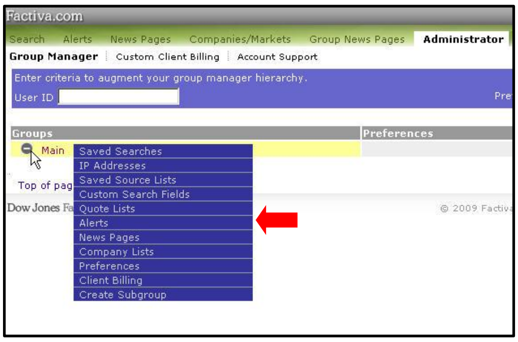
Now that you have created an Alert, you need to assign it to make it available for users to access from the general account. To do this:

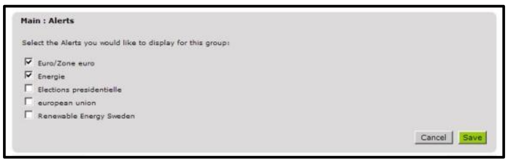
11. Click on the Administrator link in the main toolbar. You are taken to the Group Manager page.
12. Click on the group to which you want to assign the Alert from the menu and select *Alert*.

NOTE: Academic accounts usually only have one group and it is titled “Main.” If you are part of a large consortium you may have subgroups set up for each individual institution/library. In this case you will need to assign the Alert to all the required subgroups.

NOTE: If you do not assign an Alert you will only be able to view it via the administration account and not the general account. You can create as many Alerts as you want but only five can be assigned per institution and twenty-five per consortium.

13. In the pop-up window, check the box of the Alert you wish to assign and click *Save*.





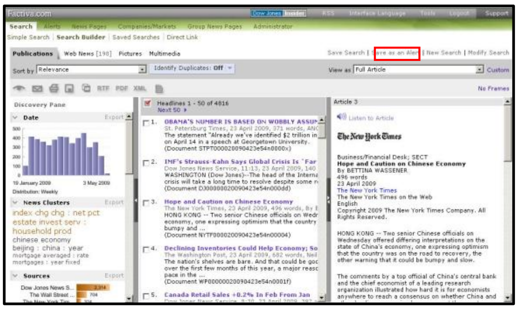
Consider these issues when setting up an Alert:

- The *atleast* and */fn/* operators cannot be used in Alerts. If you attempt to save a search query containing these operators as an Alert, you will be prompted to remove it from the query.
- When using the *adj n*, *w/n*, *near n*, */nn/* operators in Alerts, please note that they will only work within the limits of a paragraph.
- Some content that you may use in Search is not available in Alerts. This includes discontinued publications where only older articles are available, some publications whose publishers do not permit their distribution in Alerts, and some websites, as well as pictures and reports.

Creating an Alert from a Search

For ease of use, the Alerts area is very similar to Search. In fact, you may take a search query constructed in Search and use it in Alerts.

1. After conducting a search, click the *Save as an Alert* link in the upper right-hand corner of the search results page. This will take you to the ―Alert Creation” page. Your folder name and the Dow Jones Intelligent Indexing™ Company terms will automatically be selected for you.
2. Make any adjustments to the alert that you desire, such as adding free text terms, changing your sources, or setting delivery options.
3. Click *Save as Group Alert* in the upper right corner.
4. Enter Alert Name, Contact Email, and Alert Revision setting.
5. Click *Start Alerting* to complete the set-up of your Alert.



Refining Your Alert

If you are receiving too many documents or do not get the results you are expecting in your Alert, you have several options for refining it (which you can also apply on the main Search screen):

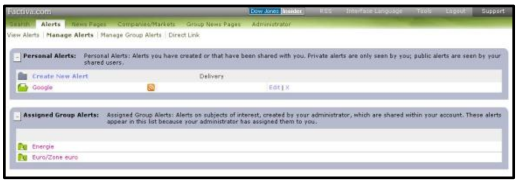
- Select Dow Jones Intelligent Indexing™ — using Dow Jones Intelligent Indexing™ is one of the best ways to make sure the items you retrieve are truly about a particular company, industry, region or subject.
- Search fewer sources — in Alerts you can limit your search to publications only or websites only. Or you can create a Custom Source List that includes just the sources you want.
- Exclude certain types of stories — from the main Alert Creation screens, click on the + sign next to the ―Exclude” option and select the box(es) next to the types of stories you want to exclude, e.g. Republished news like newswire stories, stock price, articles, and obituaries.
- Use Editor‘s Choice — *Factiva.com* editors have identified articles that shed unique insight into an industry. Material is available for 18 industries. To add Editor‘s Choice indexing terms to your search, under the Dow Jones Intelligent Indexing™ section, select the ―Subject” tab. Choose the Editor‘s Choice: Industry Trends/Analysis category. You will be presented with a list of the 18 industries covered. Highlight the industry or industries you want and click *And* or *Or*. Click *Done*.

Viewing the Results of Your Alerts Online

Go to the View Alerts tab. Click on the Alert name to view its headlines.

Managing your Alerts

Go to the Manage Group Alerts tab. Here, Administrators can create new alerts, edit or delete existing alerts. You can also view the delivery status.
NOTE: Subscribable Alerts are not available to Academic subscribers.



News Pages

News Pages allows you to access the key content areas of *Factiva.com* from one screen. You can create pages that include the ability to select, browse or search up to ten publications in Newsstand, view your Alerts, Saved Searches, industry-focused news, research on a global company, pricing information and breaking news. There are two main types of News Pages available to academic institutions – Factiva Pages and Group Pages.

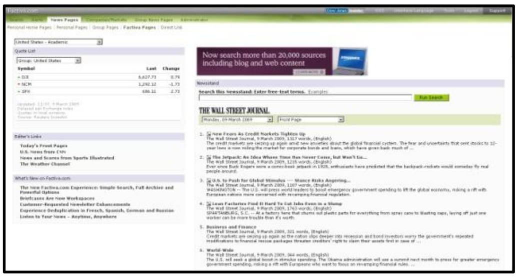
Factiva Pages

These pages are the default pages created by *Factiva.com* editors. They include access to articles from up to ten major news sources for your region from the Newsstand component, five to ten market indexes, Editor's Links. Web Resources, and What's New on Factiva.com (listing product enhancements).

Factiva Pages are currently available with coverage of 21 locations including Asia-North, Asia-Southeast, Australia, Canada, France, Germany, Italy, Spain, United States, United Kingdom, and Global.

Factiva Pages also include other special themed subject pages developed by *Factiva.com* editors in response to world events and issues, as well as industry-specific pages.

NOTE: Factiva Pages cannot be modified by subscribing institutions.



Group Pages

Group Pages are similar to the Factiva Pages except that they are created by subscribing institutions. You can create up to a hundred Group News Pages for your institution.

NOTE: Group Pages can only be set up and modified by the administrator.

Customizing Your Group Page

To create a Group Page, select the *Group News Pages* tab in the main green toolbar and click on *Create New Page*. Select the elements you want to display in the narrow and wide columns, enter a name for your page in the text-entry box and click *Save*. You may create up to a hundred Group Pages.

How to select sections for your Group Page

Several components are available for display on your News Page:

Narrow Column

- **Quotes List** — this section displays pricing information for instruments in your Quotes Lists. You can create up to ten personal Quotes Lists, with up to twenty instruments for each list, and access up to ten group Quotes Lists.
- **Saved Search Index** — you can include your saved searches and run these searches from your News Page.
- **Quotes** — request quotes on an ad hoc basis. You may request quotes on Global Stocks, Market Indexes, Funds, and Currencies.
- **Company Snapshot** — connect to Company Snapshot, which provides detailed company background and financial information on 31,000 public companies around the world.
- **Web Resources** — links to top websites, which are selected by *Factiva.com* editors for their usefulness to business professionals. They offer free information resources, tools, reference works and services. Obtain a description of the site by holding your mouse over each site name. Please note that if your organization prohibits you from accessing websites, you will not see Web Resources as an option.
- **Alert Index** – you can include an index of any Group Alerts that you have created.
- **What's New** — *Factiva.com* product-related announcements about new content and features. The announcements can include enhancements available to both academic and corporate customers and enhancements only available to corporate customers.

Wide Column

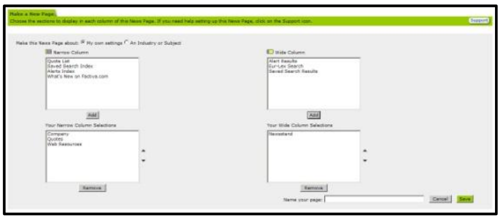
- **Newsstand** — select up to ten publications and their sections to display for browsing in your Newsstand view. You may choose from over 200 newspapers and general business publications.

- **Alert Results** — see the five most recent headlines from your Group Alerts. To view the full article, click on the headline.

- **Saved Search Results** — see the five most recent headlines of any Saved Searches you have chosen. To view the full item, click on the headline.

- **Eur-lex Search** — Select the Eur-lex component to search the Eur-lex database of directives, treaties, legislation, case law, and documents from the European Union.

The sections you select will be listed on your News Page in the order in which you chose them. For instance, if you chose Quotes List, Saved Search Index, Alert Index and Quotes from the narrow column sections, they will be listed on the left side of your News Page in that order. If you use the Quotes section frequently, you may find it useful to place it higher on the screen.



Using the Newsstand Component

The Newsstand component within News Pages features over 200 of the world's most influential newspapers and general business magazines, browsable by date and by section. If you do not specify a section of a publication, the front page or cover feature is chosen by default.

The archive for browsing is two weeks for daily publications and the most recent three issues for weekly and bi-weekly publications. For searching, the archive is three months.

You may also search the publications which you have chosen to display in your Newsstand in the free text search box at the top of the News Page using Boolean or advanced search operators.

Specifying an Industry or Subject Focus

You can focus a Group News Page on a specific industry or topic. *Factiva.com* editorial staff has identified key industries and news subjects of particular interest. They are:

- Accounting/Consulting
- Advertising/PR
- Aerospace/Defense
- Agriculture/Forestry
- Airlines
- Automobiles
- Banking/Credit
- Business
- Chemicals
- Clothing/Textiles
- Computers
- Construction/Real Estate
- Consumer Products
- Food/Beverage/Tobacco
- Health Care
- Hotels/Restaurants/Casinos
- Insurance
- Internet/Online Services
- Investing/Securities
- Media
- Metals/Mining
- Pharmaceuticals
- Retail
- Telecommunications
- Transportation/Shipping
- U.S. Sports
- World Energy
- World Sports

To make your News Page about a particular industry or subject, click the radio button next to the drop-down menu titled "an industry or subject" and select the industry or subject category you want.

Two categories - Top Industry or Subject Sources and News - are automatically added to your selected sections.

The News section can include several types of information:

Editor's Choice — overviews, trend stories, profiles, analyses or commentary items that *Factiva.com* editors believe provide unique insight into an industry.

Industry Digests — news highlights of what is happening in an industry. Digests are available for energy, insurance, and advertising/public relations only.

The five latest headlines — from top industry sources; the sources are selected by *Factiva.com* editors.

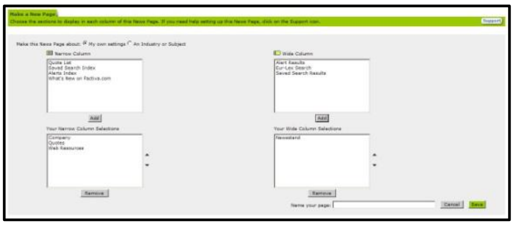
How to Create a Group News Page

- Go to the "Group News Pages" tab at the top of the screen and click <u>*Create New Page*</u>.

- You have been taken to a screen entitled "Create a new page." At the "Make this News Page about" menu, you have the option to choose "My own settings" to add your own chosen elements to the News Page, or you can choose from the pull-down menu of pre-selected industry and subject areas to create a themed page.

Adding Your Own Settings to a News Page

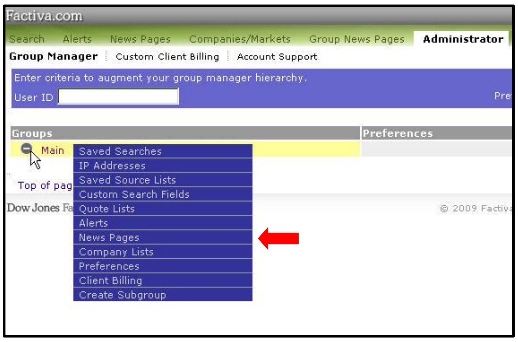
Choose which elements you would like to include in your “narrow” column by selecting an element and clicking *Add*. Now choose the elements you would like to include in your “wide” column. In the “Name Your Page” box enter a name for your News Page and click *Save*.



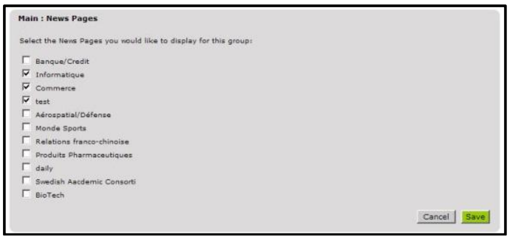
You are taken to a page titled “Edit Sections.” If you have chosen to include a Quotes List in your “narrow” column, you will be asked to choose a list. When you have done this, click on the *Newsstand* tab and add the news sources you wish to include in your page (to a maximum of ten). Click *Save*.

You are now taken to a preview of your newly-created News Page. Now you need to make it available for viewing.

To make it available for viewing, click on the Administrator link on the main toolbar. You are taken to the Group Manager page. Click on the group to which you want to assign the News Page and from the menu, select *News Pages*.



A pop-up window appears displaying all the available News Pages that can be assigned to your group. Check the box for each News Page you want to assign to the group, up to a maximum of a hundred. Click *Save*.



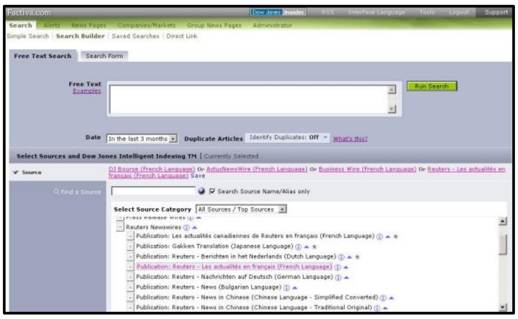
The News Page is now available for users to view.

My Source Lists

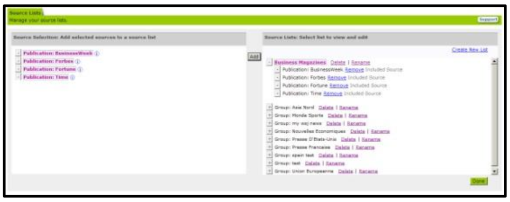
This category stores customized source lists that have been created by the institution administrator. Administrators can create up to 100 source lists, each containing up to 350 sources or groups of sources.

To create a source list

- Browse or search for a particular source or sources, e.g. *Financial Times*, *The Guardian*.
- Click on the source title. You will see that it turns pink and that an option *Save* appears to the right of the source name.
- Continue to search for sources (to a maximum of 350) until you have found all the sources you wish to include in your list.
- Click on the *Save* link.



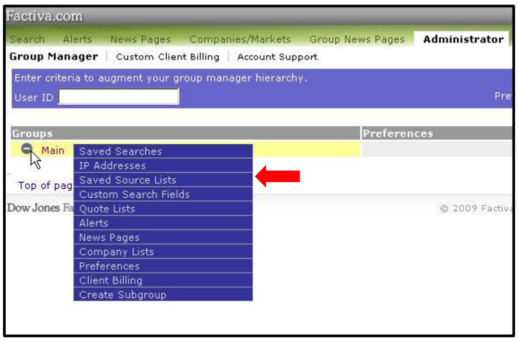
You are taken to the Manage Source Lists page.

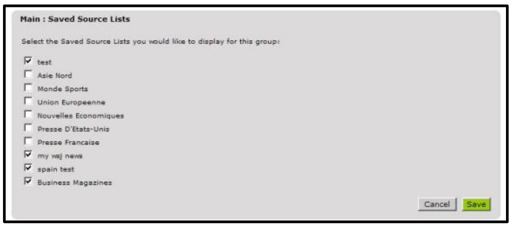


- You can choose to save your selected sources to an existing Source List or you can create a new Source List. **NOTE: Check the *Save as group item* box to make the list available to users. A summary of the sources you have selected are listed below.**
- Click *Save*. This list will now be displayed under the –My Source Lists” option that appears under the Sources index. If you do not click on *Save as a group list*, the source list will only be visible on the administration account and not the general account.

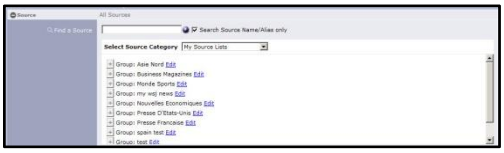
You can create as many source lists as you like, but only a hundred can be activated as group lists. To activate Source Lists:

- Click the Administrator link at the top of the *Factiva.com* screen.
- Select *Saved Source Lists* from the drop-down menu and then select the lists you with to activate.





Editing Source Lists



- Open Source from the Dow Jones Intelligent Indexing™ tab on the Search builder screen.
- Select *My Source Lists* from –Select Source Category” and choose a source list.
- Click *Edit* to add more sources to your list.

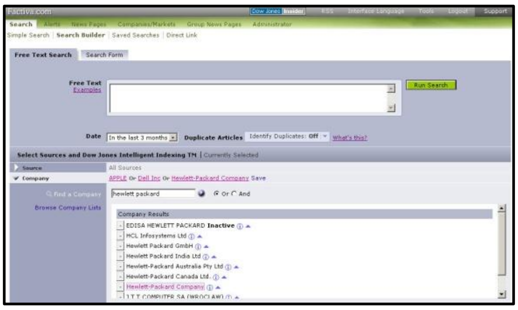
- From the –Manage Source Lists” page, search for additional sources to add and choose the source list you wish to add new sources to, and click *Done* when the changes are complete.
- From this page, you can also choose to delete or rename your source lists.

Company Lists

If your users frequently search for information about the same company or companies, you can create a Company List which is a specific list of companies. This simplifies the process of searching for information about companies in the free text search area.

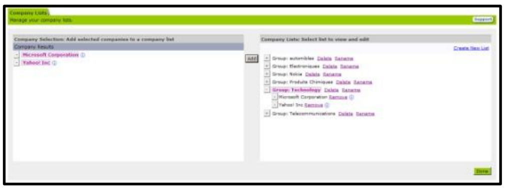
Institutions may create up to ten group Company Lists and each list can contain up to 500 companies.

NOTE: Company Lists can only be set-up and modified by the administrator.

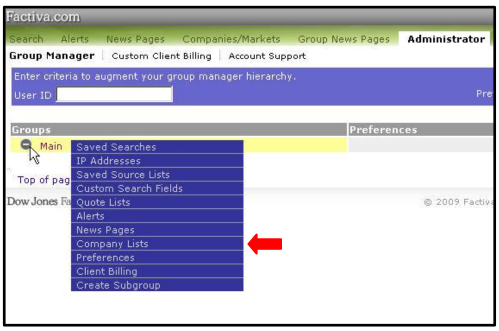


How to create a new Company List

- From the Search builder page, select *Company* from the Select Sources and Dow Jones Intelligent Indexing™ section.
- Search for the companies you wish to add to your list and select them.
- Click the *Save* link.
- In “Manage Company Lists,” choose *Add selected companies to a new company list*, name your list and check the *Save as group item* box.
- A summary of your chosen companies is listed to the left for your reference. Click *Save*.



- To make your company list available to users, assign the list via the Administrator link. Select *Company Lists* from the menu and choose your lists, up to a maximum of ten.



How to edit or delete a Company List

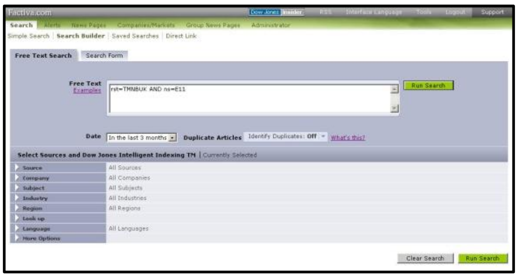
- Open *Company* from the Dow Jones Intelligent Indexing™ tab on the Search builder screen.
- Select *My Company Lists* from “Select Source Category” and choose a list.
- Click *Edit* to delete the source list altogether or add additional companies.
- From the “Manage Company Lists” page, search for additional companies to add and choose the list you wish to add the new companies to, and click *Done*.
- From this page, you can also choose to rename your company list or delete it.

Saved Searches

The -Saved Search” feature under the Search tab is where you can store searches you use frequently so that you do not have to recreate your search statement and reselect your other search criteria each time.

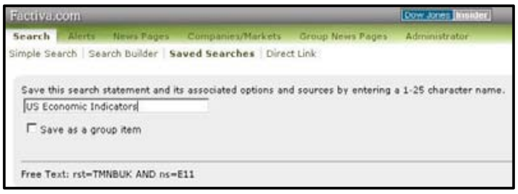
On the Search builder page under the Search tab, you have the ability to save up to a hundred group saved searches.

You have two opportunities to save searches. The first is from the main Search builder page, and the second is from the search results page.



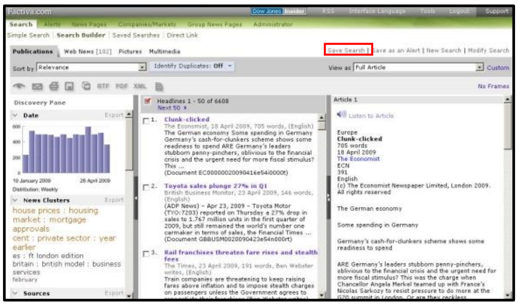
Create a Saved Search from the main Search builder page

- Select your indexing terms and source and language selections, and enter any key terms in the free text search box. Next choose your date range and exclusions.
- Now you can save your search by clicking the *Save Search* button located at the bottom of the main Search page.
- After clicking *Save Search*, you will be prompted to name the search. Enter a name with up to 25 characters. Select *Save as a group saved search*.



Create a Saved Search from the Search results page

- Select your indexing terms and source and language selections, and enter any key terms in the free text search box. Next choose your date range and exclusions.
- Run your search.
- From the top right of the results page select *Save Search*.
- After clicking *Save Search*, you will be prompted to name the search. Enter a name with up to 25 characters. Select *Save as a group saved search*.



To Edit or Delete a Saved Search

Saved Searches	Free Text	Saved Search Actions
Financial Times	rst=FTFT	Delete Search | Select Search | Run Search
Group: Carrefour	Carrefour	Delete Search | Select Search | Run Search
Group: Clearstream	clearstream	Delete Search | Select Search | Run Search
Group: fraude and electoral	fraude and electoral	Delete Search | Select Search | Run Search
Group: global warming	ns=GCLIMT AND in=ialtful	Delete Search | Select Search | Run Search
Group: Internet et Chine	internet and culture and ...	Delete Search | Select Search | Run Search
Group: Law Bill - The Lawyer	Legal Services Bill	Delete Search | Select Search | Run Search
Group: Le Monde and Afghanistan	rst=CTGLEM and Afghanista...	Delete Search | Select Search | Run Search
Group: Peugeot	Peugeot and automobile	Delete Search | Select Search | Run Search
Group: UK Law Services Bill	Legal Services Bill	Delete Search | Select Search | Run Search
Group: Wolfowitz/banque mondiale	Wolfowitz and banque mond...	Delete Search | Select Search | Run Search
Group: WSJ and ABN Amro	rst=WSJ and ABN Amro	Delete Search | Select Search | Run Search

- From the Search builder page, click *Saved Searches* at the top of the page to view your Saved Searches.
- To delete a search, click on *Delete Search* link.
- If you want to modify the search, click on *Select Search* link. The Search builder page opens allowing you to make your modifications. To save the modifications, click the *Save Search* link again. **NOTE: If you do want to save the modified search and you are already at your maximum of a hundred Saved Searches you may need to delete an old one first before creating and saving a new one.**
- To run a search, click the *Run Search* link.

Direct Links

What is a Direct Link and How Does It Work?

A Direct Link allows you to create a durable URL and go directly to a specific part of *Factiva.com*. As an administrator, you can create Direct Links and then make them available to your users by posting the links within your library/institution website or distributing specific links to certain users via e-mail.

Any Direct Link URLs you create are hosted and maintained at your library site or intranet, so you can make changes and additions when needed.

As an administrator, you may create Direct Links to the following areas of *Factiva.com*:

Search
- Search builder search screen
- Search results, including the split screen (Frames) view.

Alert
- View Alerts screen (Alert results)

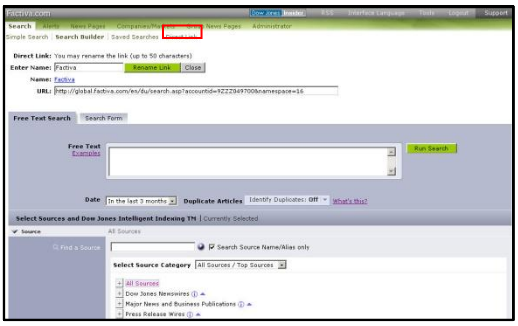
News
- Group Pages
- Factiva Pages

Companies/Markets
- Quotes
- Charting
- Company

NOTE: Factiva.com is OpenURL Target Compliant with the San Antonio profile level 1 (SAP1). Factiva.com can now be integrated with vendor OpenURL solutions or your own solution. If you have created direct links to Factiva.com the direct links will be supported as long as the source or product area is available within Factiva.com.

How to Create a Direct Link

When you log into *Factiva.com* as an Administrator, you will see –Direct Link” at the top of each screen in the sections listed above. To create a link:



- Click *Direct Link*. The Direct Link feature appears near the top of the screen.
- The default name for all Direct Links is *Factiva*. Rename the link if you wish, using up to a maximum of 50 characters and spaces, and then click the *Rename Link* button. The active link in the –Name” field will change to the new name that you entered.
- Click the active link to preview the Direct Link you have created.
- Highlight and copy the URL for use in your Intranet or e-mail messages.
- Click the *Close* button.

How to Post Your Direct Link for Others to Use

Option 1
1. Click on *Direct Link* in the toolbar of the page you wish to link to. The *Direct Link* option will appear.
2. If desired, type a new name for the link in the box provided, then click the *Rename Link* button.
3. Highlight the renamed link, right click using your mouse and select *copy*.
4. Paste the renamed link into an e-mail message or MS Word document.

Important!

- Option 1 works best with the Microsoft Outlook e-mail application. If you use Lotus Notes or another e-mail application, you may want to use both Option 1 and Option 2 in a message, or just use Option 2.
- The link will not work if it is to an area or feature users do not have permission to view. For example, if you create a link to a Group Alert and you have only allowed a certain group of users to see that Group Alert, others who click on the link will get an error message requesting that they contact their administrator.

Option 2
1. Click on *Direct Link* in the toolbar of the page you wish to link to. The *Direct Link* option will appear.
2. Highlight and copy the URL.
3. You can either paste the URL into an email message to be sent to users of your choice or make the URL available on your intranet. In either case, when users click the link, they will go directly to the specified part of *Factiva.com*.

How to Make Your Direct Link More Precise

Direct Links can be made more precise by setting Preferences (see page 6).

When you choose to create a Direct Link to the Search screen, for example, you could simply go to that screen and click the *Direct Link* icon. Then, when your users follow that Direct Link, their view of the screen would include any individual preferences they had already set. If they had not changed their preferences since first accessing *Factiva.com*, the default values would apply.

Alternatively, you could choose specific *Preferences* to change how the screen appears to all users who follow the Direct Link. For example, you may select a date range of the past six months, you may specify certain content languages, and you may choose to exclude republished news or other recurring items. You may create a Saved Source List of top news and business publications for certain world regions and have those Saved Source Lists appear as choices on the screen.

Usage Reports

Administrators can download usage statistics from within *Factiva.com* using the administrator login details.

There are several types of reports available:

- Account Summary
- Client/Project Summary
- Individual Client/Project Summary
- Individual Summary
- User Summary
- COUNTER Reports

For academic accounts, we recommend that you use the COUNTER Reports.

COUNTER Reports

For Academic Account Administrators, Dow Jones Factiva now provides COUNTER Compliant Reports through the Dow Jones Customer Support site, under the Administration tab in the Billing and Usage section. COUNTER (Counting Online Usage of Networked Electronic Resources) as an academic industry (usage) reporting standard.

Select *COUNTER Reports* from the menu in the left margin to get a listing of available reports. Click the links for the reports in Excel, CSV and SUSHI-compliant XML formats. **NOTE:** A separate Admin ID is required to access SUSHI-compliant reports. Please contact your ProQuest account representative or ProQuest customer service representative to obtain your SUSHI admin ID.

The following reports are included:
Journal 1 – Number of successful full-text requests by month and journal
Database 1 – Total searches and sessions by month and database
Database 2 – Turnaways by month and database

Additionally, the following reports are available only to Academic Consortia Account Administrators, and only in SUSHI-compliant XML form:
Consortium Report 1 – Number of successful full-text journal article or book chapter requests by month, broken down by consortium member
Consortium Report 2 – Total searches by month and database, broken down by consortium member.

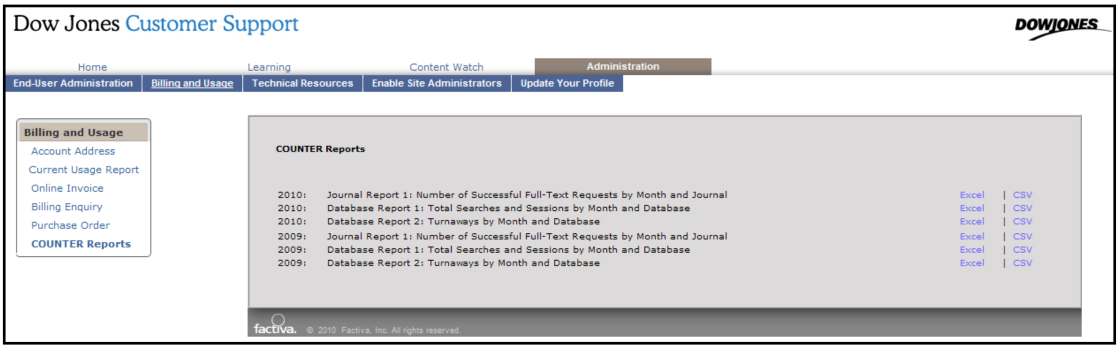
Important Notes:

- Reports will be provided monthly with year-to-date totals.
- Reports will be available in a reasonable time frame after the end of the month (at least by the 7th day after the end of the month).
- Reports will be made readily available at all times to Academic Administrators only – reports will NOT be made available to academic end users.
- Reports will be made available for the previous year and the current year (when enough data has been accumulated to show this requirement).
- Data will be accumulated month over month. This data must be available for these reports at any given time, which means a report must contain the entire year's worth of data each month.
- All individual reports are available in Excel, CSV and SUSHI-compliant XML formats. Consortium Report 1 and Consortium Report 2 are only available in SUSHI-compliant XML format.
- ISBN number will NOT appear in Dow Jones Factiva reports. Dow Jones Factiva does not have the content that is associated with an ISBN since they are associated with books – we do not have books in our database. This field will simply be blank or contain no data.
- The reports were deemed compliant as of March 2008. Our current implementation of COUNTER Release 3 (R3) is under consideration by the COUNTER organization. A compliance audit is expected to be completed by COUNTER in 2010.
- The SUSHI (Standardized Usage Statistics Harvesting Initiative) Protocol standard (ANSI/NISO Z39.93-2007) defines an automated request and response model for the harvesting of electronic resource usage data utilizing a Web services framework.
- **NOTE: The Journal 1 report may contain statistics for "Unknown" and "Reuters Fundamentals." Reuters Fundamentals hits account for usage of the Company and Markets data. Due to the number of elements within these reports the usage can be very high. Unknown content includes content Factiva does not have a publisher name for, such as company information retrieved from a Company snapshot.**

Accessing Usage Reports for Dow Jones Factiva.com

Usage Reports are available through Factiva Customer Support.

1. Sign in to Factiva.com as the administrator.
2. Click the *Support* link in the upper right corner, a new window will open up to Dow Jones Customer Support.
3. Click the *Administration* link.
4. Click the *Billing and Usage* link
5. Chose they type of report from the menu on the left side.



Web Service/FTP Access to Counter 3 Reports

This section explains the steps required by Dow Jones customers to access the COUNTER R3 reports via Web service/FTP service. **NOTE:** A separate Admin ID is required to access SUSHI-compliant reports. If you have not received a SUSHI admin ID please contact your ProQuest account representative or ProQuest customer service representative to obtain your SUSHI admin ID.

1. SUSHI Reports available via Web Service

SUSHI compliant XML output of the following reports:

- **Journal Report 1** - Number of Successful Full-Text Article Requests by Month and Journal
- **Database Report 1** - Total Searches and Sessions by Month and Database
- **Database Report 2** - Turnaways by Month and Database

Note: CSV/XLS output format of the above reports are available only from the Dow Jones Customer Support portal.

Web Service (SUSHI Reports)

URL: https://customer.factiva.com/CWS/CounterWebService.asmx

The web service interface provides a mechanism to download the COUNTER R3 reports in SUSHI compliant XML format.

Methods exposed

The webservice exposes one method, *getCounterReport*.

This method requires the following parameters:

Parameter	Description	Sample Input
UserName	User name for accessing the web service	testuser
Password	Password for accessing the web service	testpassword
Namespace	Namespace for the credentials	123
Report Type	Type of report requested (JournalReport1 (or) DatabaseReport1 (or) DatabaseReport2)	DatabaseReport1
Year	Year for which the report is needed	2010
Product ID	Same as namespace	123
IP Address	IP Address of the machine that issues the request	10.20.3.4

Response

The response of the getCounterReport method is a string which contains the SUSHI formatted XML.

Sample output


```
  <?xml version="1.0" encoding="utf-8" ?>
- <ReportResponse xmlns="http://www.niso.org/schemas/sushi/counter" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
    xsi:schemaLocation="http://www.niso.org/schemas/sushi/counter http://www.niso.org/schemas/sushi/counter_sushi3_0.xsd"
    xmlns:s="http://www.niso.org/schemas/sushi">
  - <Requestor xmlns="http://www.niso.org/schemas/sushi">
      <ID />
      <Name />
      <Email />
    </Requestor>
  - <CustomerReference xmlns="http://www.niso.org/schemas/sushi">
      <ID />
    </CustomerReference>
  - <ReportDefinition Name="DB2" Release="3" xmlns="http://www.niso.org/schemas/sushi">
    - <Filters>
      - <UsageDateRange>
          <Begin>2010-01-01</Begin>
          <End>2010-02-28</End>
        </UsageDateRange>
      </Filters>
    </ReportDefinition>
  - <Report>
    - <Report Created="2010-03-05T04:34:58Z" ID="" Name="DB2" Title="Database Report 2 (R3)" Version="3" xmlns="http://www.niso.org/schemas/counter">
      - <Vendor>
          <Name />
          <ID />
        - <Contact>
            <E-mail />
          </Contact>
        </Vendor>
      - <Customer>
          <Name />
          <ID />
        - <ReportItems>
          - <ItemIdentifier>
              <Type>Proprietary</Type>
              <Value />
            </ItemIdentifier>
            <ItemPlatform />
            <ItemPublisher />
            <ItemName>Total for all Databases</ItemName>
            <ItemDataType>Database</ItemDataType>
          - <ItemPerformance>
            - <Period>
                <Begin>2010-01-01</Begin>
                <End>2010-01-31</End>
              </Period>
              <Category>Turnaways</Category>
            - <Instance>
                <MetricType>count</MetricType>
                <Count>0</Count>
              </Instance>
            </ItemPerformance>
```

The basic structure of the web response is:

```
- <ReportResponse>
  - <ReportDefinition>
    - <Report>
      - <Report>
        - <Customers>
            <ReportItems />
          - <ItemIdentifier>
              <Type />
              <Value />
            </ItemIdentifier>
            <ItemPlatform />
            <ItemPublisher />
            <ItemName />
            <ItemDataType />
          - <ItemPerformance>
            - <Period>
                <Begin />
                <End />
              </Period>
              <Category />
            - <Instance>
                <MetricType />
                <Count />
              </Instance>
            </ItemPerformance>
            <ReportItems />
          </Customers>
        - <Customers>
            <ReportItems />
            <ReportItems />
          </Customers>
        </Report>
      </Report>
    </ReportDefinition>
  </ReportResponse>
```

The data is enclosed within **<ReportResponse>** tag.
<ReportDefinition> tag displays the short name of the report and the version along with the usage date range.
<Report> tag displays the name, title and created date of the report.
<Customer> tag displays the data for a particular customer and the report items are available within the **<ReportItems>** tag.
<ItemIdentifier> is an enumerated type that takes only the following values as per COUNTER standards:

1. Online_ISSN
2. Print_ISSN
3. EISSN
4. ISSN
5. ISBN
6. Online_ISBN
7. Print_ISBN
8. DOI
9. Proprietary

<ItemDataType> is an enumerated type that takes only the following values as per COUNTER standards:

1. Journal
2. Database
3. Platform
4. Book

<Category> is an enumerated type that takes only the following values as per COUNTER standards:

1. Requests
2. Searches
3. Sessions
4. Turnaways

<MetricType> is an enumerated type that takes only the following values as per COUNTER standards:

1. ft_ps
2. ft_pdf
3. ft_html
4. ft_total
5. Toc
6. Abstract
7. Reference
8. data_set
9. audio
10. video
11. image
12. podcast
13. search_reg
14. search_fed
15. session_reg
16. session_fed
17. count
18. other

2. Consortium Reports available via FTP Service

SUSHI compliant XML output of the following reports:

- **Consortium Report 1** - Number of successful full-text journal article or book chapter requests by month, broken down by consortium member
- **Consortium Report 2** - Total searches by month and database, broken down by consortium member

FTP Service (Consortium Reports)

FTP Server name: **select.factiva.com**

User name format for the user ‗testuser' is **select\testuser**

A username and password is required to access the FTP service at select.factiva.com. The Consortium reports will be posted every month to this FTP site and can be accessed by Consortia admins.

If you prefer to use Firefox or Windows Explorer for accessing usage statistics the basic URL structure is:

ftp://select\username:password@select.factiva.com

For Windows Explorer:

Please right click on Start ⇨ Explore then paste the URL into the address bar

The reports would be available as a SUSHI compliant XML file which can be downloaded via any FTP client.

NOTE: This method does not work in Internet Explorer at this time.

Account Support

Dow Jones Customer Support provides detailed information to help you get the most of out of your *Factiva.com* subscription. To access Dow Jones Customer Support, click the Support button that appears in the right-hand corner of every screen.

Technical Support

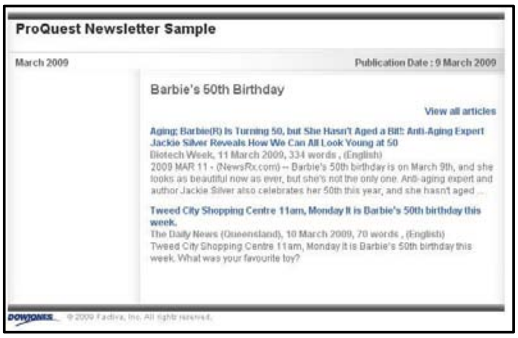
Full technical support is available, in addition to Dow Jones Customer Support. For technical queries, please contact ProQuest at: tsupport@proquest.com or telephone (800) 889-3358 (North American customers), support@proquest.co.uk or telephone +44 (0) 1223 271496 (International customers), or 0800 220 710 (UK customers only).

Appendix I: Newsletters

Build a Newsletter in Factiva.com

Timely, relevant newsletters can help you drive awareness about news that you have identified as critical to your users. Whether you send daily news to faculty, prepare a weekly newsletter, or share research with colleagues occasionally, Factiva's newsletter-building capabilities let you create professional, attractive newsletters with ease.

You may create a total of 600 Newsletters and Editions, which means you could have 600 Newsletters without any saved Editions, or 1 Newsletter with 599 Editions, or any combination in between. Each Newsletter may contain up to 100 articles. Text boxes for adding comments, descriptions, or summaries may contain up to 700 characters and spaces.



Follow these four steps to build a newsletter in Factiva.com:

1. Select Content
2. Create a New Newsletter
3. Format Content
4. Design Newsletter
5. Edit an Existing Newsletter

Select Content

From a search or Alert

1. Click the checkbox next to any article headline in your search result or Alert.
2. Click to begin building your newsletter immediately.

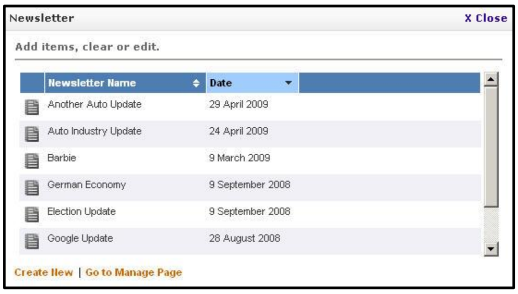
From a Alert or Workspace

1. Click *Tools*, then select Newsletter to open the Newsletter Builder.
2. Click the *Select Content* pull-down menu in the left margin.
3. Drag and drop content into the Newsletter.

Create a New Newsletter

1. Follow the directions above to select content for your newsletter.
2. At the prompt, enter a Newsletter Name.

3. Hover over the newsletter name from the menu and click *Add*.



4. Choose a section. You have just created the main content of your newsletter.
5. You will return to the list of newsletters, hover over the newsletter name and click *Edit* to format the newsletter.

Format a Newsletter

Once you click *Edit*, you have many formatting and design options. Select from some or all of the following options:

Add a Masthead

1. Enter a URL to add a Web-hosted logo or image. For best display logos should be no larger than 200x200 pixels.
2. Enter a title for your newsletter.
3. Click *Save* to save your changes and view them.

Add Dateline

1. The date is automatically formatted as year/month/day. To change the date, delete the auto-text and enter a new date.
2. Click *Save* to save your changes and view them.

Add Title

1. Add a secondary name for this newsletter edition by entering text in the open field.
2. Click *Save* to save your changes and view them.

Add Summary

1. Type in free text to summarize or describe the contents of the newsletter edition.
2. Click *Save* to save your changes and view them.

Add Footer

1. To add a footer to the bottom of all pages in your newsletter, click *Add Footer*.
2. Enter your free text along with any copyright or trademark information.
3. Click *Save* to save your changes and view them.

Reorder Articles

1. To move an article to a new location in the newsletter, click the collapse view. Mouse over the article headline until a gray bar appears and the article is highlighted in yellow.
2. Drag the article to its new location.

Optional Features

Add Subheadings

1. Enter a subheading name to divide your newsletter content into subsections for better organization and viewing.
2. Click *Subheading* on the Newsletter Builder menu bar. A subheading box will appear. Type the subheading you wish to use and drag and drop it where you need it.
3. To move your subheading to a new location, mouse over the subheading until a gray bar appears and the subheading is highlighted in yellow.
4. Drag it to a new location with your mouse. Subheadings can be positioned anywhere in your newsletter.
5. Subheading titles also dynamically appear in the Table of Contents.
6. Click *Save* to save your changes and view them.

Add a Link

1. Click *Add Link* on the Newsletter Builder menu bar. Fill in the text boxes that appear with the appropriate information and click *Save*.
2. Links will appear at the bottom of the Newsletter, but you can drag and drop them where you need them.

Table of Contents (TOC)

1. Click *TOC* on the Newsletter Builder menu bar.
2. A Table of Contents will appear listing your subheadings.
3. Click *Update TOC* if you add, remove or rename subheadings.

Horizontal Line

1. Click *Horizontal Line* on the Newsletter Builder menu to add visual dividers to any sections of your newsletter.
2. To move your horizontal line to a new location, mouse over the line until a gray bar appears.
3. Drag the line to the new location with your mouse. Horizontal lines can be positioned anywhere in the document.

Add Link

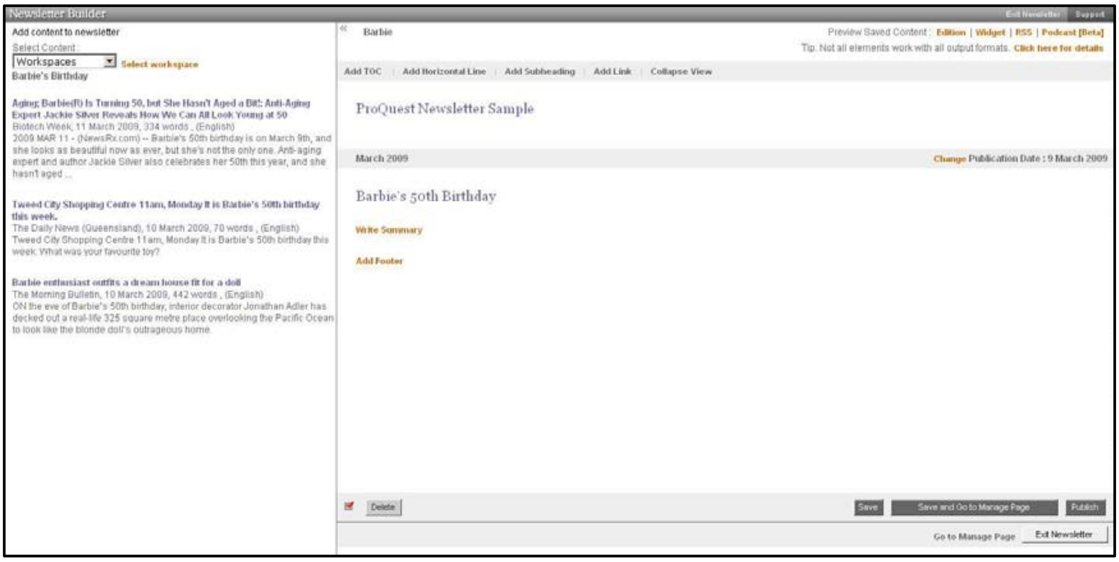
1. Click *Add Link* to include links to other internal or external content.
2. Enter a URL and title then add up to 256 characters of commentary to describe the content.
3. To move your linked item to a new location, mouse over the gray subheading bar and drag it to the new location with your mouse. Linked items can be positioned anywhere in the document.
4. Click *Save* to save your changes and view them.

Add Comment

1. To add up to 256 characters of commentary to any article, mouse over the article headline until a gray bar appears.
2. Click *Comment* and enter your text into the open field.
3. Click *Save* to save your changes and view them.

Add Flag

1. To add a flag to any article, mouse over the article headline until the gray bar appears.
2. Click *Flag* and select the desired flag from the menu.
3. To remove a flag, mouse over the article headline until the gray bar appears. Click *Flag* and then *Remove Flag*.
4. Flags can be used to draw attention or assign priority to a given article.



Design a Newsletter

Once you have formatted your newsletter to include a masthead, table of contents and subheadings, there are several design options available for your newsletter.

1. Click *Save* and *Publish* when you have finished organizing content.
2. Selection output format:

HTML Additional customization can be added using an HTML editor (i.e. Dreamweaver, Front Page). This output format also allows you to apply a publically accessible CSS (Cascading Style Sheet) file, so that your newsletter can reflect your organization's persona in terms of colors, font, and layout

An HTML newsletter can be posted as a Web page or used in an HTML e-mail or e-mail attachment.

Embedded HTML
Embedded HTML will be emailed by Factiva. It is optimized for Outlook 2003.

RTF Additional customization can be added using an RTF editor (i.e. Microsoft Word).

PDF The format will enable you to limit changes to the content after you sent it.

WIDGET
Create a Widget with the Widget Designer that can be posted to your intranet, SharePoint site, iGoogle, PageFlakes, Netvibes, Blogger, Microsoft Live or Live Spaces.

RSS RSS feeds can be created and posted in a feed reader, e-mail or on an intranet site.

Podcast
Share content as a podcast through your intranet, SharePoint site, iGoogle, PageFlakes, Netvibes, Blogger, Microsoft Life or Live Spaces. Podcasts are limited to articles from publications that are less than 5,000 words and are in English, French, German, Spanish or Italian.

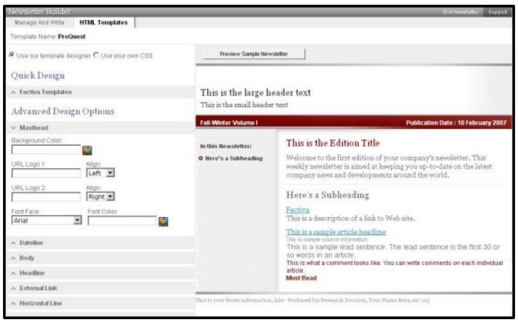
NOTE: Newsletter recipients must have access to your subscription to Factiva.com. They must be logged into Factiva.com to view the articles from the Newsletter.

3. Select a template if you are publishing the Newsletter traditionally.

Create and HTML Template

1. Click the *HTML Templates* tab from the Newsletter Builder page.
2. Type a name for the template using no more than 39 characters.
3. Click *Create Template* which opens the template designer.

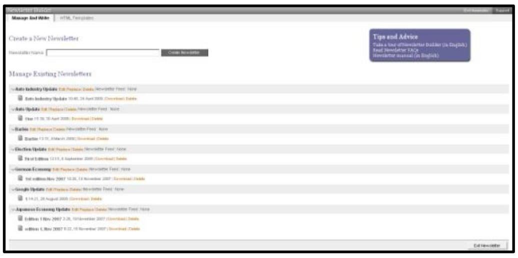
4. When using the temple designer, you may create your template with either:
   a. The Quick Design form which lets you start with an existing Factiva template and make modifications as needed.
   b. The Advanced Design form which lets you start without a pre-existing template.
5. Open/Collapse the first section (Masthead, Dateline, Body, Headline, External Links, Horizontal Lines, Add TOC and Footer) to access the different design option available for customization.
6. Within each section, edit colors by entering a legitimate hex code or by using the color picker to select a color.
7. Add up to 2 logos that must be saved to a publically accessible website. Copy and paste the URL into the URL Logo 1 and/or URL Logo 2 text boxes and choose the desired alignment.
8. Using the drop-down options, select from 9 font types.
9. Click *Preview Sample Newsletter* to preview a sample of what your changes will look like when applied to a newsletter.
10. Open/Collapse the other sections and make changes as appropriate to the colors, fonts, etc. Each section may have options applicable only in that section.
11. Click the *Save Template* button when all of your selections have been made.



Edit or Repurpose an Existing Newsletter

1. Click *Tools* then *Newsletter* to access the newsletter feature from anywhere in *Factiva.com*.
2. From within the Newsletter Manager, Choose one of the following options for existing newsletters: Edit, Replace, Delete, Download.
3. Choose Edit to open the editorial space and make changes to the format/content of the newsletter.
4. Choose Delete to delete a newsletter and all of its content.

5. Choose Download to view archived content, published traditionally.
6. Turn a newsletter feed ON or OFF.



Appendix II: Workspaces

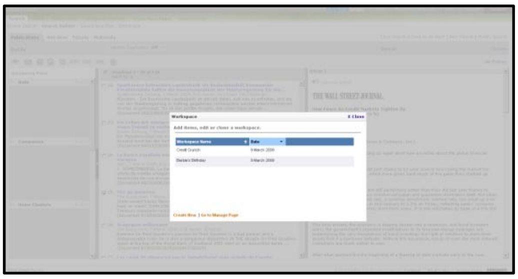
In March 2009 Briefcases were replaced by Workspaces. Workspaces allow you to hold results in Factiva.com indefinitely. You may maintain up to 25 Workspaces at a time and store up to 100 pieces of content in each Workspaces. Workspaces can be shared via Widgets, RSS, and Podcast.

Creating a Workspace

1. Only library administrators can create Workspaces.
2. Content can be added from search results, Alert results, and News Page results from Newsstand, Saved Search results, Alerts Results, and Eur-lex components.
3. Select articles for your Workspace by clicking the boxes to the left of a headline or clicking a headline to open an individual article.
4. Click the Workspace icon .
5. Select the *Create New* option and type the name for the Workspace into the box provided, click *Save*.

NOTE: Workspaces can also be accessed by clicking Tools from the Factiva.com menu bar and selecting Workspaces.

To add articles to an existing Workspace, select articles, click the Workspaces icon, then mouse over the name of an existing Workspace and click *Add* when it appears.



Sharing Workspaces

1. Workspaces can be shared with anyone that can access your library's Factiva.com subscription.
2. Click *Tools* then *Workspaces*.
3. From the Workspace Inventory screen click the *Options* link to the right of your Workspace name, then select *Publishing* from the menu that appears OR when viewing the contents of a Workspace click the *Publish* link in the upper right corner of the screen.
4. You will be asked to Set Workspace Audience. You may select to send it to Factiva users in your account or to Factiva users outside your account.
5. There are three publishing options: Widget, RSS, and Podcast.

Widget

1. Click the *Create Widget* button and the Widget Designer will open.
2. Type the name for your Widget and select design elements.
3. Click *Save Widget Design Now*.
4. Click *Publish my Widget Now*.
5. Either copy and paste the Widget code into your intranet or SharePoint site OR add the Widget to iGoogle, PageFlakes, Netvibes, Blogger, Microsoft Live, or Live Spaces.
6. Once you create a Widget you can access the Widget Builder by clicking *Tools* on the Factiva.com menu bar.

NOTE: Once the Widget is published on the web anyone that can access your library's subscription to Factiva.com can click the links in the Widget and read the full-text articles.

RSS

1. Click the *Get RSS* button, then copy the URL from the address bar in the browser window that opens up.
   a. Paste the URL into an email message or post it to your intranet. Any recipient that can access your library's subscription to Factiva.com can access the links in the feed and access the full-text articles.
   b. You may stop the RSS feed from this Workspace at any time by clicking the radio button on the Workspace Inventory screen.

Podcast [Beta]

1. Click the *Create Podcast[Beta]* button.
2. Add the Podcast to your intranet or SharePoint site by copying the code and pasting the URL from the pop-up into your webpage OR add the Podcast to your iGoogle, PageFlakes, Netvibes, Blogger, Microsoft Live, or Live Spaces page.
3. To stop sharing your Workspace content in any form, select to turn off the feed from the Inventory view. This will remove the Widgets, RSS and Podcasts you have published.

NOTE: Content in podcasts is limited to articles from publications that are less than 5,000 words and are in English, French, German, Spanish or Italian.