



>> USER GUIDE
VERSION 1.0

SEARCH & DISCOVER

A complete guide to using the Search & Discover app in Refinitiv Workspace

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Getting started

Search & Discover is a cross-content search tool for financial analysts, investment bankers, corporate strategists or any users who need to digest large volumes of material to make informed decisions.

You can search across millions of documents from thousands of sources, from news, broker research, company presentations, earnings calls and regulatory filings to research companies, industries, markets, events and trends.



To launch the app, type **SD** into the search bar and press **enter**.

Homepage

Recent Searches

Quickly browse through and load previous searches

Saved Searches

View any search that you have saved

Most Read News Browse the important news related to your portfolios, lists and favorite indices

Blue flame This means a story has been deemed important by our algorithms or Reuters editors, is trending based on readership or is breaking news.

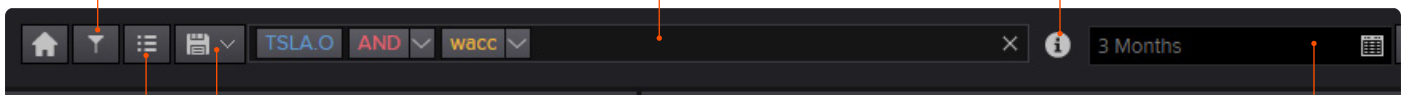
Recent Docs A list of your most recently viewed documents

Search toolbar

Filter your content sources, set the research primary ticker and turn synonyms on/off

Search by company, industry, country, keyword, topic, KPI or index. Enter multiple terms for an advanced cross-content search

View information about Boolean search options



Open the facets panel to filter results by company or topic

Save your search or open a previously saved search

Choose a preset range or select the calendar icon for custom dates

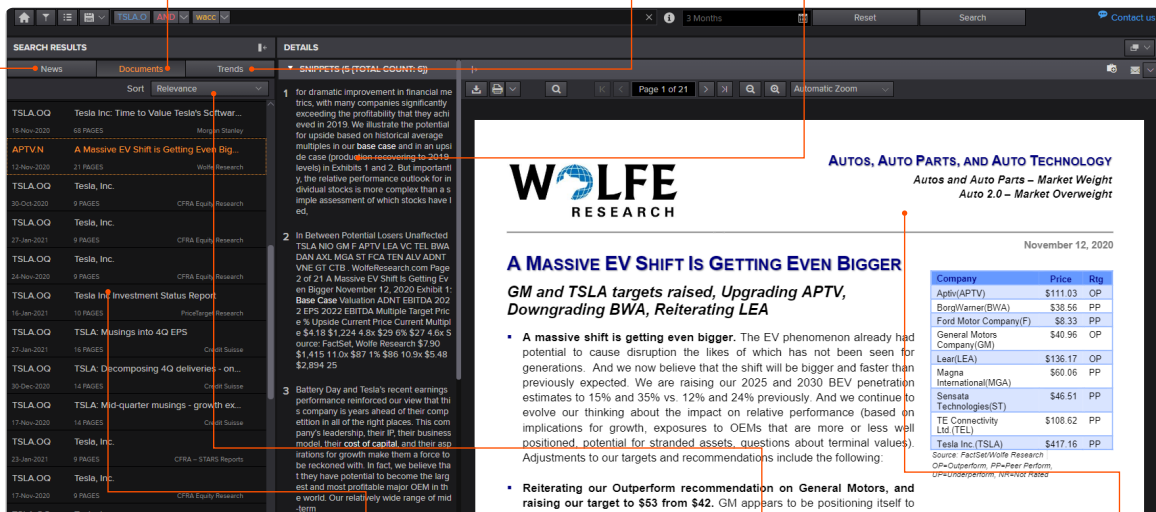
Search results

Headline results for news wires, web news and global press

Headline results for research, filings and transcripts

A chart showing the number of documents related to your search

For keyword searches, snippets are generated for large documents to make it easy to scan the document



The headline panel displays the first 25 headlines in both the News and Documents tabs. Scroll to the bottom and the next 25 headlines will appear

Keyword or topic searches are sorted by relevance. All other searches are sorted by date

Documents are shown using the appropriate document viewer. Each has its own toolbar

Performing a search

You can carry out a simple search, or a complex one with the help of Boolean or proximity operators.

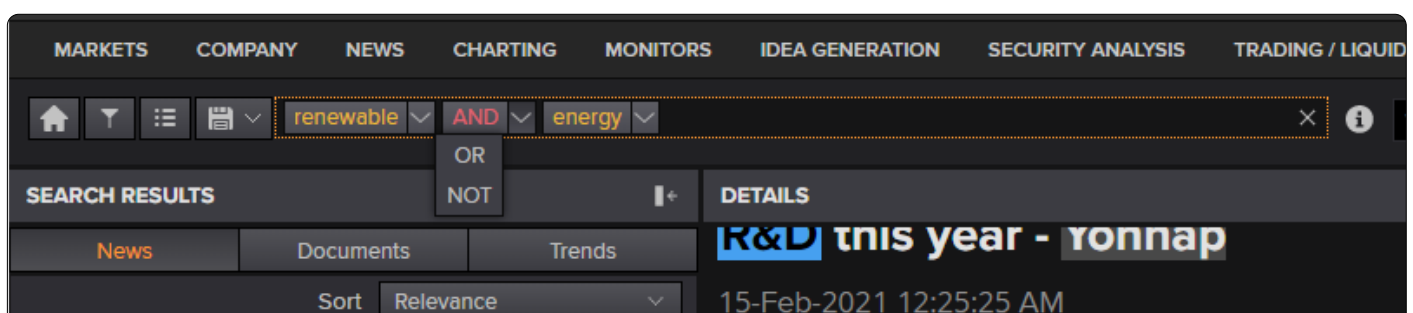
Make your search more precise by adding multiple parameters, such as a company, portfolio, sector, industry, country or region.

Autosuggest will show results as you type and can be selected at any time.

How to search using Boolean operators

Make your search more precise by using the Boolean operators AND, OR and NOT. You can also add parentheses to group your search terms.

- 1 Type a search term then press **enter**.
- 2 Type another search term then press **enter**, and a Boolean operator will then appear between the search terms.
- 3 Select the arrow next to it and choose from AND, OR and NOT.



If you enter...

renewable AND energy

renewable OR energy

renewable NOT energy

margin pressure

increas*

You get...

stories mentioning renewable **and** energy

stories mentioning **either** renewable **or** energy

stories about renewable that **do not** mention energy

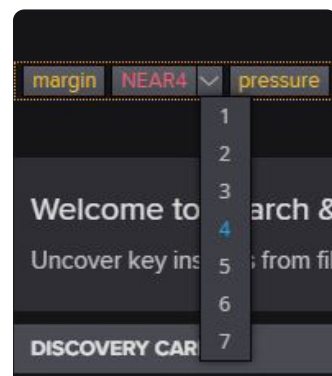
stories containing margin pressure as an **exact phrase**

stories containing any **words beginning** increas

How to search using proximity operators

Another way to make your search more precise is by using a proximity operator. This finds keywords that are close to each other by up to seven words.

- 1 Type **near** after you have entered a search term.
- 2 Select the **Proximity:** option from autosuggest.
- 3 Go to the dropdown menu and select the proximity.
- 4 Type another keyword then press **enter**.



Selecting a date range

The default date range is set to a week. You can choose another time period or select a custom date range.

You can access five quarters' worth of news content and five years of research, filings and transcripts.

Go to the calendar icon and select another date range — from 1 week to 5 years. Or select **Custom Dates**, choose the start and end dates, then select **Apply**.

Saving searches

You can save your search to use again in the future.

How to save a search

- 1 Carry out a search as usual.
- 2 Go to the save icon and select **Save Search**. A popup will appear showing details of your search
- 3 Enter a name then select **Save**.

How to access a saved search

- 1 Select the **Save** icon and you will see a list of previously saved searches.
- 2 Select the search you want to access and it will run automatically.



Using Filters and Facets panels

The Filters panel offers a number of ways to refine your search results. Select the **Filters** icon next to the Search & Discover homepage button, and the panel will open on the left.

Research Primary Ticker

When the research primary ticker is selected search results will appear for two reasons – when the result is specifically about the company (primary ticker) or where the company is simply discussed (secondary ticker). You can tick or untick this box when a company is added to your search. The box is ticked as a default.

Synonyms

If the Include Synonyms box is selected when you search for a keyword, related synonyms will be included to broaden the search.

To view the synonyms listed alongside your keyword, make sure **Include Synonyms** is selected then select the arrow next to the keyword in the search box. You can unselect them all, or one at a time. Include Synonyms is selected by default.

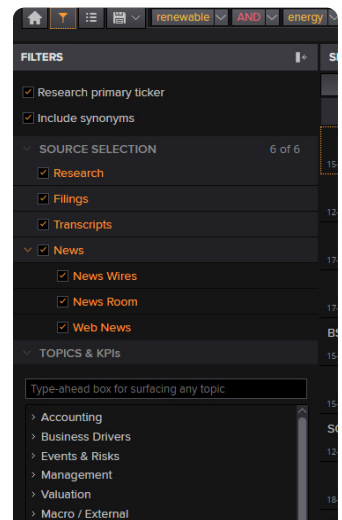
Source Selection

You can focus a search on specific content sources. Select the **filter** icon from the Advanced Search view to open the Filters panel. Select Source Selection to expand the section, then choose your preferred sources. All content sources are selected by default for each search.

Topics & KPIs

Popular topics and KPIs have already been created. Select **Topics & KPIs** to expand the section.

You can either browse the sections or type something into the search box below the Topics & KPIs heading. Select an item and it will be added to your search. Unselect an item or delete it from the search box to remove it.



Tip

When there is an orange dot next to the filters icon, this shows not all sources are selected.

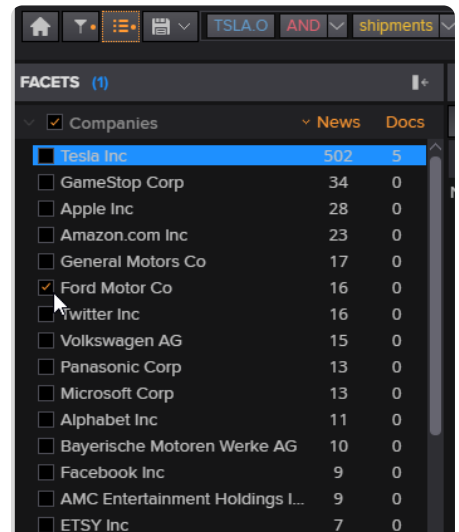


Using the Facets panel

The Facets panel lets you select specific companies or topics to refine your search results.

Select the **facets** icon and the Facets panel will open. The Companies section will be selected and expanded by default.

Topic facets are available for news and research content. To open Research and News Topics, tick the box next to the title and the section will expand.



Tip

When there is an orange dot next to the facets icon, this shows one or more facets have been selected, so results are being filtered.

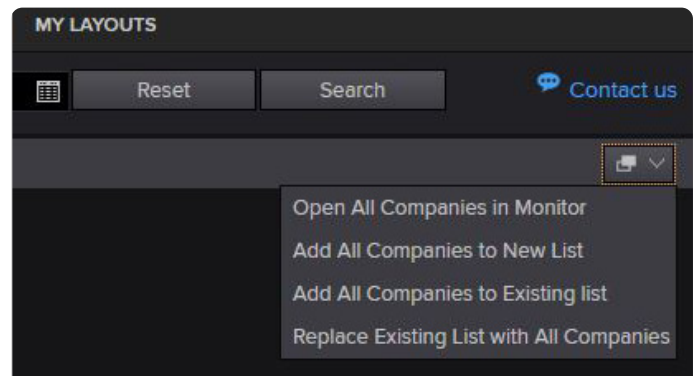
Working with search results

Adding companies to a list

You can save all the companies tagged to the documents in your search results.

These saved lists can be used in other apps such as Watchlist Pulse or Screener.

Only companies from the headlines currently on display will be added to these lists. Scroll to the bottom for more headlines to appear.



Find the Add To List menu in the top right corner of the screen

How to use the Add To List menu

Select the **Add To List** icon on the top right of Refinitiv Workspace to see your options. Then:

Select **Open All Companies In Monitor** and the Monitor app will launch, showing all companies from your search results.

Select **Add All Companies To A New List** and the Create Watchlist pop-up will appear. Enter a name and short name, then select **Save**.

Select **Add All Companies To An Existing List** and the My Portfolios & Lists pop-up will appear. Select a list and the companies will be added.

Select **Replace Existing List With All Companies** and the My Portfolios & Lists pop-up will appear. Select a list to override the original companies.

How to add an item to your briefcase

- 1 Hover over a search result and the briefcase icon will appear.
- 2 Select the icon and the item will be added to your briefcase for offline reading. The icon will then appear with a plus (+) symbol. To remove an item select the **briefcase** icon again and a minus (-) symbol will appear.



Viewing search results

There are two ways you might be able to view the news or documents that appear in your search results.

Go to the Documents tab in the left-hand Search Results panel and select the document you wish to view.

When selected, most news or documents will automatically be previewed in the right-hand panel, so you can read it there and then. Web News stories and Linkback Research will open in a pop-out. Just select the item and it will automatically open.

Snippets

Snippets are chunks of text that surround a keyword or synonym that matches your search. They make it easy to quickly scan search results and jump to the relevant section of a document.

The left-hand panel will show a list of snippets. Select a snippet and the preview panel will highlight that section in the document.

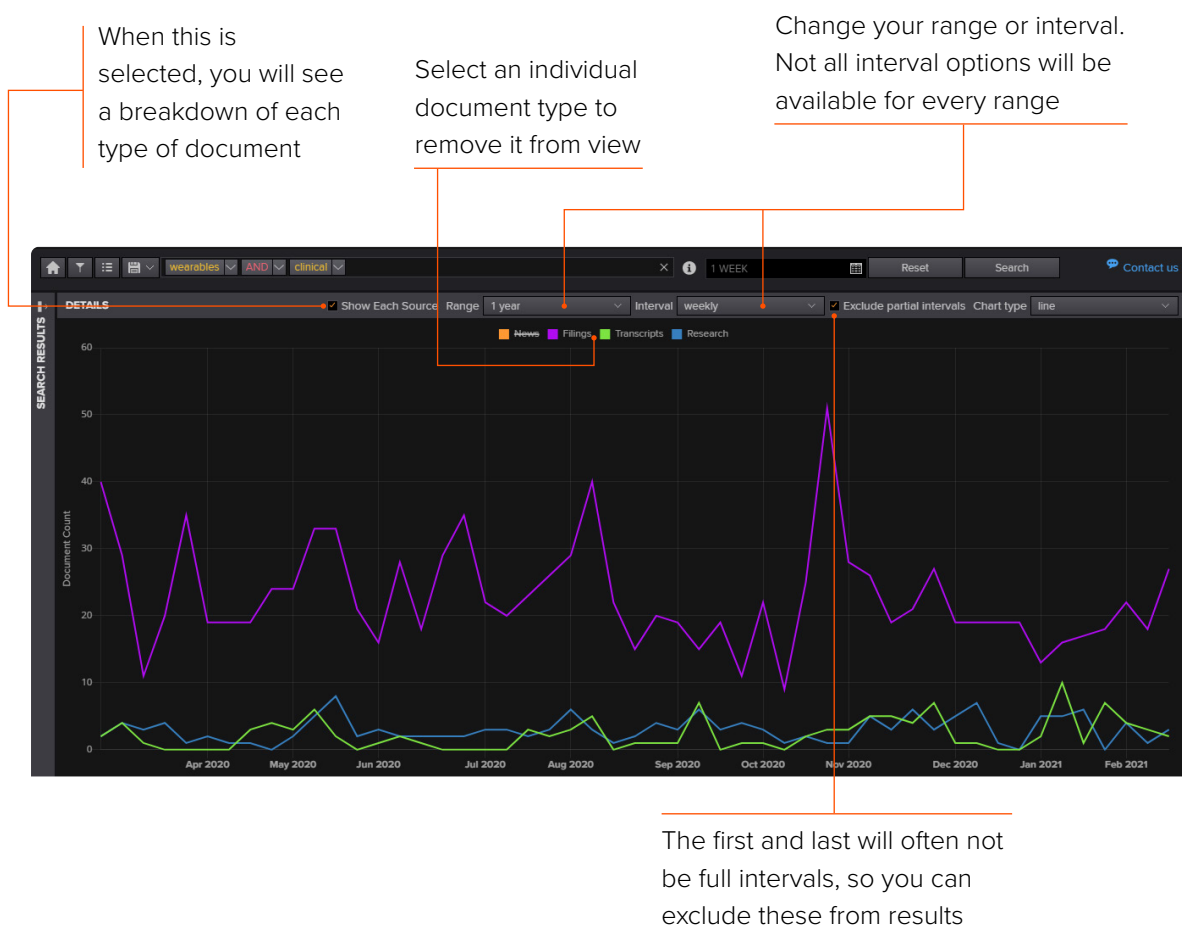
The screenshot displays a search results interface. On the left, a 'SEARCH RESULTS' panel shows a list of snippets under the heading 'SNIPPETS (4 [TOTAL COUNT: 7])'. The snippets are numbered 1, 2, and 3. Snippet 1 discusses EV volumes and premium sedans. Snippet 2 discusses Tesla's performance in China and the US. Snippet 3 discusses Tesla's delivery estimates. On the right, a preview panel shows a document snippet with a bulleted list and a bar chart titled 'TESLA IS THE ONLY COMPANY TO GROW ITS DELIVERIES IN H1'. The chart shows Tesla's growth (positive bar) compared to other companies (negative bars).

Company	Change (%)
Tesla	~15%
Volvo	~-10%
Mercedes	~-15%
Toyota	~-18%
BMW	~-20%
VW	~-22%
Ford	~-25%
Nissan	~-28%
Renault	~-30%
PSA	~-35%

Trend analysis

You will see the Trends tab alongside any search results. It shows a time series chart of the number of documents related to your search. You can customize the range, interval and type of chart.

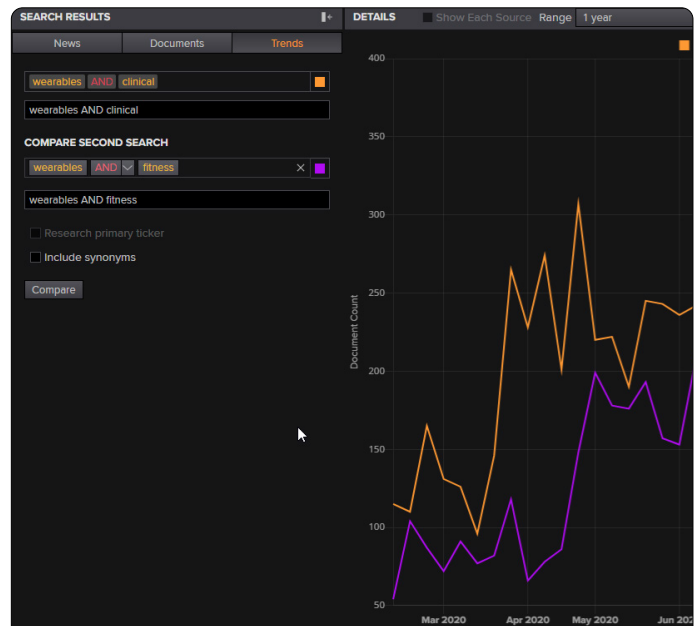
Trend analysis overview



Running a second search for comparison

You can run a second search to compare it with your first search. This can be a quick tool for showing a rough market segmentation.

- 1 In the Trends tab, go to the search bar below Compare Second Search.
- 2 Enter a new search. Like your original search, you can select the research primary ticker or include synonyms.
- 3 Select **Compare** and you'll see the two searches on the chart. Like before, select a search title at the top of the chart to remove it from view.



Need more help?

You can contact us directly through Refinitiv Workspace: go to the help icon in the top right corner, go to Contact Us and select **Get Help & Support**. Or you can access learning content on the training site: training.refinitiv.com

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