

Personal Profiles

What are Personal Profiles?

Personal Profiles are saved searches that allow you to monitor the media for news stories that are of interest to you and your organization. By using keywords and phrases to define topics you wish to follow, FPinfomart.ca Personal Profiles will pull relevant articles each day from our complement of news sources. Your Profile results are updated every time you refresh your Personal Profiles page.

Creating New Personal Profiles

To create a new Personal Profile, click on [Personal Profiles](#) from the **Media Monitoring** menu located on the left-side of your screen.

Once the screen refreshes to the 'Personal Profiles – Summary page,' click on the [Create a New Personal Profile](#) link.



This link is located in two places. It can be found on the far right-side of the screen, beneath the date drop-down box, as well as under the 'Personal Profiles' link on the Media Monitoring menu.

News Settings

1. Name your Personal Profile in the first field; 'Profile Name.' The name you choose to enter here is not included as a search word. It has no bearing on the search. It is for your reference only. If you have multiple Personal Profiles, they will be displayed in alphabetical order, based on the profile name.
2. The default behaviour of Personal Profiles is that the "I want this Profile to Search News" tick-box is checked. This opens the form to allow keyword entry. By keeping a checkmark in this box, you are telling this profile to search all news sources with the keywords and phrases that you indicate.

If you UNCHECK this box, the keyword entry for News Settings is disabled, your profile will not search news sources and your page will refresh to the Video Settings screen.

2. Keep checked to allow keyword entry.

New Profile

1. Profile Name

Profile Name
Forestry

I want this profile to search news

3. Search Terms

Match stories that mention ANY of these phrases...

forest*
tree*
woods

in Headline or Lead

4. Where are you searching?

3. Enter your main search terms or keywords in the **“Match stories that mention ANY of these phrases ...”** box. Each word or phrase must be on a separate line. The search will look for ANY terms entered into this box.
4. Use the pull-down menu to pinpoint where you would like your search terms to appear within your resulting stories. By restricting your search to ‘in Headline or Lead’ you will locate major articles on your topic.
5. *(Optional)*
If desired, enter additional search terms in the **“And require at least one mention of one of these ...”** box. These are additional search concepts. At least one term entered here must also appear in all resulting stories. Again, use the pull-down menu to pinpoint where search terms will appear within stories.

And require at least one mention of one of these... (optional)

annual report*
profit*
loss*

anywhere in Story

Note: The asterisk (*) is a **wildcard** character which allows automatic retrieval or exclusion of varied word endings. For example, the search term ‘profit*’ – as seen above – will retrieve stories that mention ‘profit,’ ‘profits,’ ‘profitable,’ ‘profiting,’ ‘profited,’ etc.

Following the same logic, the search term ‘merger*’ – as seen below – will exclude stories that mention the words ‘merger,’ or ‘mergers’ etc.

It will not exclude stories with the words ‘merging’ or ‘merged’ because in this example, the asterisk will only find and then exclude stories that include ‘merger’ as the root word. If you would like to exclude the above terms you must place the asterisk after the ‘g’.

For example, ‘merg*’.

6. *(Optional)*
If desired, enter search terms which must NOT appear in the stories in the third text box; **“But exclude any story that mentions one of these ...”** Terms entered into this box are given precedence when combined with your other search terms. Avoid entering general terms that can be used in multiple contexts. Once more, use the pull-down menu to pinpoint where search terms will appear within stories.

But exclude any story that mentions one of these... (optional)

merger*
aquisition*

anywhere in Story

Exclusion Filters

Exclusion Filters are an additional way of filtering results. If selected, articles classified with the selected story type will be excluded from your Personal Profile results.

Select the filters you wish to activate by clicking a checkmark in the box beside the desired filter.

Exclusion Filters	
<input checked="" type="checkbox"/>	Editorials
<input type="checkbox"/>	Letters to the Editor
<input checked="" type="checkbox"/>	Sports
<input checked="" type="checkbox"/>	Arts, Life, Homes, Food
<input type="checkbox"/>	News Briefs
<input type="checkbox"/>	Stock Market Summaries
<input checked="" type="checkbox"/>	Caption Only
<input checked="" type="checkbox"/>	CP Wire in papers

- The **Editorials filter** excludes any article whose story type is classified as an Editorial.
- The **Letters to the Editor filter** excludes any article whose story type is classified as a Letter to the Editor.
- The **Sports filter** excludes any article which originated in the Sports section of the newspaper.
- The **Arts, Life, Homes, Food filter** excludes any article which originated in the Arts, Life, Homes and Food sections of the newspaper.
- The **News Briefs filter** eliminates columns of short news summaries, where the title or headline of the column is 'News Briefs.'
- The **Stock Market Summaries filter** eliminates articles which are lists of stock market results.
- The **Caption Only filter** excludes any item which has no story text. For example, the caption of photos or other images that ran with out an accompanying article.
- The **CP Wire in papers filter** excludes articles whose source is CP Wire (Canadian Press). This allows you to cut down on duplicate results. This Filter will NOT exclude the original CP Wire articles. It only eliminates those versions printed in newspapers.

Selecting Sources

If you would like your Personal Profile search terms to scan all of the available FPinfomart.ca sources, place a bullet in the 'All available sources' field.

If there is only one particular source that you would like to scan, click on the drop-down menu to the right of the second field; 'Select a single source,' and choose the appropriate source.

Databases	
<input checked="" type="radio"/>	All available sources
<input type="radio"/>	Select a single source <input type="button" value="v"/>
<input type="radio"/>	Select a library of sources <input type="button" value="v"/> Manage your Libraries
<input type="radio"/>	Show me the full list of databases

In addition to selecting a single source, you can also select a group of sources. These groups are known as "Source Libraries." A number of Preset Libraries have been created, which can be viewed by clicking on the drop-down menu located on the right of the "Select a library of sources" field. If you have created your own 'Source Libraries' in the Archives module, you will be able to access these Libraries here.

If you wish to be more specific about which sources are searched, choose the **'Show me the full list of databases'** link, and click **'Create.'**

The screen will refresh to the **'Select Sources'** screen. Place a check mark next to all the sources you would like to include in your Profile. Consider your source selection carefully by choosing publications that would have the best and most relevant information on your topic.

Select Sources

Canadian Banks - finance

SELECT ALL SOURCES

National Papers SELECT ALL

National Post

B.C. Papers SELECT ALL

<input type="checkbox"/> Abbotsford Times	<input checked="" type="checkbox"/> Fort St. John Northerner	<input type="checkbox"/> Okanagan Weekender
<input checked="" type="checkbox"/> Alaska Highway News	<input checked="" type="checkbox"/> Grand Forks Boundary Bulletin	<input type="checkbox"/> Peace River Block Daily News
<input checked="" type="checkbox"/> Alberni Valley Times	<input checked="" type="checkbox"/> Grand Forks Gazette	<input type="checkbox"/> Penticton Herald
<input checked="" type="checkbox"/> Burnaby Now	<input type="checkbox"/> Harbour City Star	<input checked="" type="checkbox"/> Prince George Citizen
<input type="checkbox"/> Campbell River Courier-Islander	<input type="checkbox"/> Kamloops Daily News	<input checked="" type="checkbox"/> Prince Rupert Daily News

If you wish to save your source selection as a library, enter a library name at the bottom of the page and click **'save'**.

Bank Investment Consultant Future Banker Small Business Banker

Bank Technology News Insurance Accounting US Banker

Bond Buyer Mortgage Servicing News

Broker Magazine Mortgage Technology

To create a Library, so you can use these sources with other profiles and searches, enter a name below.

Library Name: **Enter your library's name here.**

Your library will have been saved as well as your personal profile. Your screen will refresh to the **'Edit Profile – Video Settings'** page.

Video Settings

By default, the same keywords that you entered in the **'News Settings'** screen will automatically be entered in the Video search fields.

To search Video channels, place a checkmark here.

Edit Profile - Video Settings

Profile Name
Banks - Canadian

I want this profile to search video

Match video that mentions ANY of these phrases...

RBC

CIBC

You may find that journalists on television speak differently than print journalists write. If you would like to tweak your video keywords to be more appropriate for broadcast monitoring, you can do so at this stage.

Selecting Channels

By default, “All channels” is selected. As with news sources, it is important to choose the right complement of channels in order to ensure the most effective profile with the most relevant results.

You can narrow your video channel selection in two ways. The first is by geographical region, and the second is by network.

If you decide to choose a “category heading” from either the ‘Channels by Network’ or the ‘Channels by Region’ drop-downs, your profile will search all of the channels in that category. For example, if you would like to monitor the entire Global network, select “Global” in the ‘Channels by Network’ field. This will keep your search more broad.

For example, if you are only interested in searching Global television in Edmonton, do not highlight the ‘Global’ category heading, but rather the ‘Global – Edmonton’ sub-heading. This will limit your profile to only searching the Global-Edmonton channel. Your profile will not retrieve stories that aired on Global – Toronto, unless they also aired in Edmonton.

Channels

All channels

Channels by region ▼

Channels by network ▼

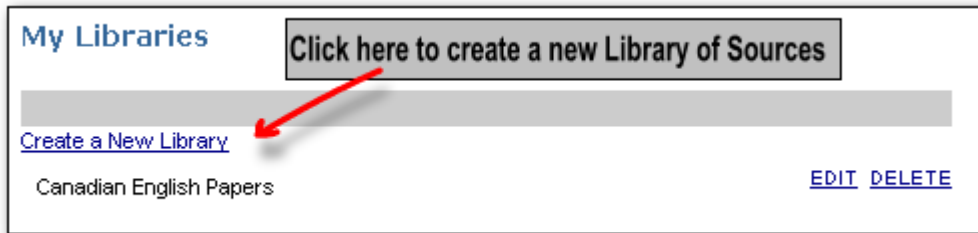
SAVE
DELETE
CANCEL

Once you have selected the channels you wish your profile to monitor click ‘save.’ Both News and Video results will be available immediately.

Creating Libraries

To create a new library, to use in future Personal Profiles click on the ‘Manage your Libraries’ link, located next to the ‘Select a library of sources’ field on the ‘New Profile’ screen. Once the screen refreshes to the ‘My libraries’ page, click on ‘Create a New Library’

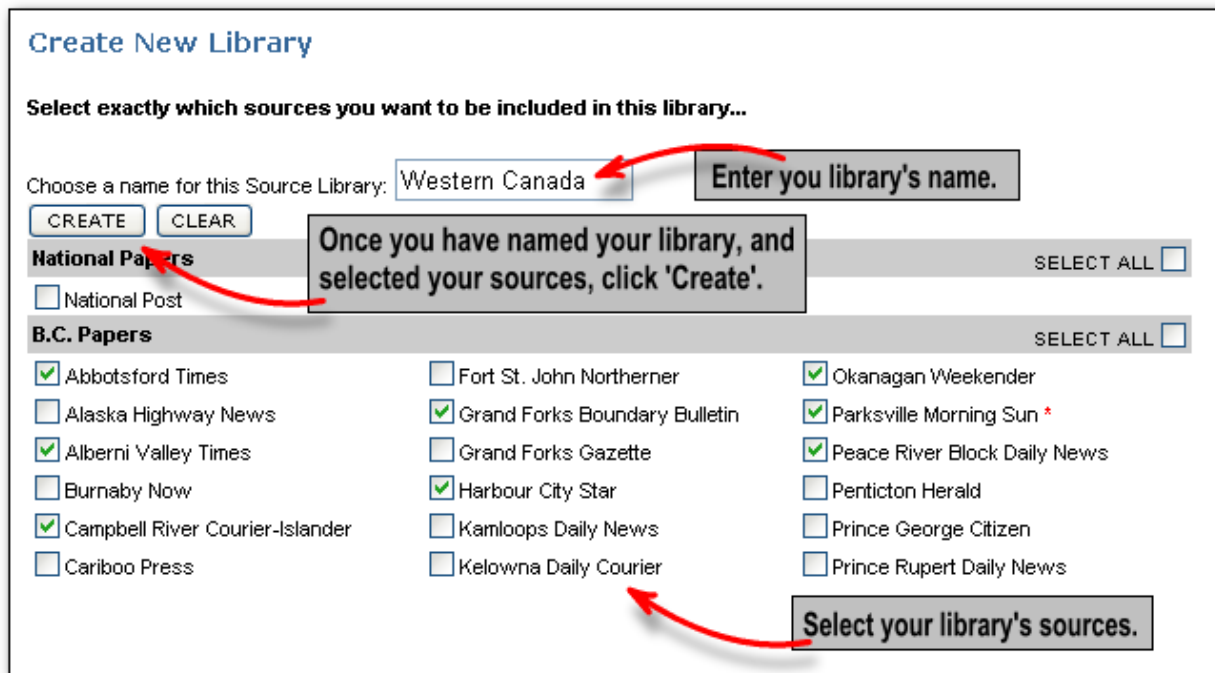
to set up a new library of sources. This screen will also list your current libraries. You can edit and delete current libraries from this page.



The 'Create a New Library' link will refresh you screen to the 'Create a New Library' page.

In the top field, enter the name of your library. This name is for your reference only. Pick a name that describes the type of sources that you have included in the library.

Select the sources that you would like to include in your library, by placing a checkmark in the box beside the source's name.



Once you are finished naming, and selecting the sources you wish to include, click 'Create'.

Viewing Personal Profiles

To view your Personal Profiles, click 'Personal Profiles' on the Media Monitoring navigation menu. This menu is on the left-side of your screen. Once clicked, your screen will refresh to a summary of your Profile results for today.

The screenshot shows two columns of results. The left column is titled 'Click here to see all News results' and shows a news article titled 'Interest rate relief?' with a snippet of text and metadata. The right column is titled 'Click here to see all Video results' and shows a video titled 'Trading Desk with Pat Bolland' with a snippet of text and metadata. Both columns have a 'First 1 of' indicator and a link to view all results.

All results are subdivided into "News" and "Video." Only one article hit and one video hit will be shown, even if there is more than one available. In order to see the full result lists, click on the news or video 'hit count.'

If from the News Results view you wish to switch to your Video Hits, click the "Searches Video" link at the top of the screen.

The screenshot shows a button labeled 'Click here to view Video results' and a link 'searches video.' Below this, the profile name 'Banks - Canadian' is shown with navigation links 'NEWS SETTINGS VIDEO SETTINGS DELETE'. A date box shows '1-10 of 35 condensed hits. (45 individual hits.)' and a pagination control with '10 20 50 100 200 hits per page.' and 'Page: 1 2 3 4 Next Page'.

Profile results for the previous 10 days can be viewed by clicking on the drop-down date box, located in the upper-right corner of your screen. Click on the drop-down date box, located in the upper-right corner of your screen, to choose the desired day.

The screenshot shows a date selection interface with two rows. The first row is 'Personal Profiles: Summary' and the second row is 'Date: Thu Jul 6 (Today)'. Both rows have a drop-down arrow on the right and navigation buttons on the left and right.

7. View results for a different date by selecting the date here.

Editing Personal Profiles

Your Personal Profiles can be changed at any time. You can edit the title, add or delete keywords, turn exclusion filters on or off, or change the sources that are searched. To edit your Personal Profiles:

1. Click the 'Personal Profiles' link on the Media Monitoring navigation menu located on the left-side of your screen.
2. Once the page refreshes to the 'Personal Profiles – Summary' screen, click on either 'News Settings,' or 'Video Settings' next to the profile that you wish to change.

Forestry [NEWS SETTINGS](#) [VIDEO SETTINGS](#) [DELETE](#)

First 1 of [94 news hits](#) shown. First 1 of at least [27 video hits](#) shown.

To edit your News keywords or sources, click on 'News Settings.'
To edit your Video keywords or channels, click on 'Video Settings.'

Personal Profiles can also be changed from within the 'Personal Profiles – News Results' or the 'Personal Profiles – Video Results' screens. From the 'Personal Profiles – Summary' screen, click on the 'news hits' or 'video hits' link. In the above example, you would click on the '94 news hits' link to get to the 'Personal Profiles – News Results' screen, and '27 video hits' to be taken to the 'Personal Profiles – Video Results' page.

All results will be displayed on these pages. Click on 'News Settings,' or 'Video Settings' to edit what you would like to change.

Morning E-mail

With FPinfomart.ca, you are provided with the option to receive a once-daily (Monday through Friday) e-mail message that contains the headlines of the first four stories for each of your Personal Profiles. You must come to FPinfomart.ca to view the full text of these stories, as well as any other additional results.

By default, the morning e-mail option is turned ON when you create a new profile. To turn this option off, go to the Preferences section and view your e-mail preferences.

FPinfomart.ca

Home | Products & Services | About Us | Help

infomart web mode
[SET SESSION ID](#) | [LOGOUT](#)

Welcome, Joe Test

Usage \$0.00 0 items preferences

To change, email and password preferences, click here.

You will have the option to turn the morning e-mail off or on from this screen. You can also choose between an HTML or plain text version of the morning e-mail, as well as change your e-mail address from this screen.

E-mail Preferences [Display Preferences](#) | [Change Your Password](#)

Use this form to update your e-mail address anytime, or subscribe to our morning e-mail services.

E-mail address

I prefer e-mail in HTML Text

Personal Profiles Morning E-mail
(Personal Profiles results will be emailed to you if checked)

The morning e-mail represents a snapshot of your Profiles' results at the time the e-mail was sent. Because sources are added to FPinfomart.ca throughout the day, you must visit your Results Summary screen periodically to see if you have additional results.

*For further assistance with Personal Profiles, please contact us at
1-800-661-7678, or e-mail the Help Desk at
helpdesk@canwest.com.*