First Research

User’s Guide

Welcome to First Research. This user guide will show you everything you need to know to access and utilize the wealth of information available from First Research.

The First Research program is an Internet-based database that may be accessed by using one of the network computers in the McLeod Business Library in Alan B. Miller Hall.

Mason School of Business graduate students, undergraduate students with a business major, faculty and staff may also access this program through the Mason School of Business network.

Other College of William & Mary students, faculty and staff may access First Research by going to the Earl Gregg Swem Library home page at http://swem.wm.edu

Select Research on the Home page header, then Library Databases in the menu column on the left. On the Library Databases page select Business & Economics in the Choose Databases by Subject section. First Research will be on the list displayed.

Introduction

First Research is a leading industry intelligence database. This program provides 900 industry segment profiles, and numerous geographic profiles, with information synthesized from hundreds of sources. Each industry profile is constantly updated with monthly statistics and quarterly trends.
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Initial Screens

The First Research program opens with a series of screens. Each screen has a button that must be pressed before continuing on to the next screen, and finally the program.

The first screen is the *Mergent* screen. Click on the **Continue** button.

The second screen is the *First Research Industry Intelligence* Screen. Click on the **Continue** button on this screen to move to the next screen.

The last screen is the *Access First Research* screen. This screen gives you general information about the First Research program. Click on the **Submit** button to open the program.
Opening Page

The First Research program opens with the **Industries** tab of the opening page displayed. This page has a program header that is displayed on every page within the program. The program header has five tabs: **Industries, North America, Sales & Marketing, Industry Prospector**, and **International**.

There is also a search box in the header. This search box will open an **Industry Search** page with the results of your search. This is the same page that is opened when a search is made using the **Industry** tab search box. See page 5 for information about the **Industry Search** page.

The **Contact Us** link will open a page with contact information for First Research.
Header Tabs

The program header has five tabs. These are **Industries** (see below), **North America** (see page 11), **Sales & Marketing** (see page 13), **Industry Prospector** (see page 14), and **International** (see page 15).

**Industries Tab**

The First Research program opens with the **Industries** tab displayed. This tab has a search feature that allows you to search for industry profiles using a keyword search. You may enter a keyword or industry code (NAICS or SIC code).

There is also a link to **Browse Industry Profiles**, see page 7 for information about this feature.

The Industries tab also has boxes with additional links and information (see page 10). The boxes are: Most Recent Updates, Inside News, Tools and Resources, and Community.

**Search for Industry and Geographic Profiles—Keyword Search**

When the **Industries** tab opens, the **Keyword** search function is displayed. This is a simple search function with only one box for search term entry.

To perform a search, enter your search term (keyword or industry code - NAICS, SIC) into the box and click on the **Search** button. This will open an **Industry Search** page with the industry profiles found in your search listed.

The top of the list tells you how many profiles were found.

Each entry on the list includes the name of the industry profile and a short information line about the profile. Each entry also
includes the NAICS & SIC codes that are included in that profile.

Clicking on the industry name will open the Industry Profile page for that industry. See page 8 for information about the Industry Profile page.

**Search for Industry Profiles—SIC Code and NAICS Code Searches**

To search using industry codes (SIC or NAICS), enter a code number into the box and click on the **Search** button.

The program automatically searches for NAICS codes to match the code you entered. The Industry Search page that is opened with your search results lists all the NAICS codes that matched your code.

Each entry has the industry name and the NAICS codes included in that industry. Clicking on the name of the industry profile will open the Industry Profile page for that industry. See page 8 for information about the Industry Profile page.

If you want to search for SIC codes, click on the **Would you like to search by SIC Code? Please click here** link below the box. This will rerun the search using your code to search for matching SIC codes.

The Industry Search page that is opened is similar to the page opened for the NAICS search.
Browse Industry Profiles

There is a Browse Industry Profiles link below the search box on the Industries tab. Clicking on this link will open an Industry Search page with a list of industry sectors. You may use this list to browse for industries.

Each Industry Search page also has a Browse Industry Profiles section on the right side of the page. You also may use this feature to browse for industries. These are listed alphabetically while the sectors list groups the industries by type (sector).

On the Industry Search page, each entry on the list is a header for a major sector of industry. You may open the various sectors by clicking on the arrow icons next to each header.

This will expand the selected sector to include all the industries included in that sector. Each entry on this list is a link to that industry’s Industry Profile page. See page 8 for information about the Industry Profile page.

The small globe icon included in some entries indicates that the Industry Profile for that industry includes global insights.

The alphabetical listings operate in a similar manner. The heading may be expanded to display all the industries included in that heading. Each entry on this list is a link to that industry’s Industry Profile page. See page 8 for information about the Industry Profile page.

The small globe icon included in some entries indicates that the Industry Profile for that industry includes global insights.
Industry Profile Page

The Industry Profile page has three main sections: the column on the left with a table of contents, the profile header, and the main content.

Header

The Industry Profile header includes the name of the industry, the date the profile was updated, and the SIC and NAICS codes that are included in the industry.

The header also includes the title of the section of the profile you are viewing (e.g., Profile Overview).

There are two links in the header: Full Profile and Call Prep Sheet. The Full Profile link will open the entire industry profile on one long scrolling page. Clicking on a section in the table of contents column will open only that section, instead of scrolling the page to that section.

The Call Prep Sheet link will open a one-page call sheet with sections for: Key Business Challenges, Key Business Opportunities, Monthly News, Fast Facts, and Executive Talking Points. You may use this as a guide to give yourself a better understanding of the industry prior to talking to a representative of a company in that industry.

Column

The column on the left has several sections. The Tools section has one link: Call Prep Sheet. This opens the same page as the Call Prep Sheet link in the header.

The next section is the table of contents for the profile. Clicking on one of the section titles will open that section of the profile in the main content area. The default display is Profile Overview, this section is not in the table of contents—the bottom of each section has a link to return to the Profile Overview. Selecting a section will display only that section.
The Related Industries section of the menu column lists other industries that are related to the industry displayed. Clicking on one of these industries will open the Industry Profile page for that industry.

**Content Display Area**

The main content area of the page displays the profile. The initial display (Profile Overview) is a short page with a brief description of the industry. Some sections on this page have “View All” links (at the bottom of the section) to the more complete section of the profile.

Once you click on a section title in the table of contents column only that section will be displayed. You may display the entire profile again by clicking on the Full Profile link in the header.

The content display area changes when the various section titles are selected. The column menu is similar for most industries. The standard selections are: Industry Overview, Quarterly Industry Update, Industry Forecast, Critical Issues, Business Challenges, Business Trends, Industry Opportunities, Executive Insight, Financial Information, Call Prep Questions, and Websites & Acronyms. Some industry profiles may have other selections such as Focus Profile with additional selections under it.

Clicking on a country selection under Focus Profile will open a profile for the industry in that country.

The other selections will open pages with information specific to that selection. Most pages have short articles and some charts and tables that cover the topic.

The Financial Information selection opens a page of charts and tables giving financial data about the industry.

Selecting Call Prep Questions opens a page with a list of questions that may be asked during a call. Each question has a one line description.

The Websites & Acronyms selection opens a page with links to websites that are pertinent to the industry. The page also includes a list of acronyms and definitions that are specific to the industry.
Industries Tab Boxes

The Industries tab includes some boxes that contain useful information and links. These boxes are: Most Recent Updates, Inside News, Tools and Resources and Community.

Most Recent Updates

The Most Recent Updates box has a list of reports that have been updated recently. Clicking on a report title will open the Industry Profile page for that industry.

Inside News

The Inside News box has a list of short descriptions about updates and improvements to the First Research database.

Community

The Community box has links to Twitter and Facebook as well as information about current events with links to websites.

Tools and Resources

The Tools and Resources box has links to tools. The number varies from time to time.

The Welcome Toolkit link will open a multipage PDF file with information about using the First Research database.

Clicking on the Self-Paced Training Videos selection will open a page with links to some videos that give you tips and instruction on how to use the database.

Live Training Session will open a page where you may register for an online training session.

Tips & Best Practices will open a page with tips about some of the features offered in First Research and how to use them.
North America Tab

Clicking on the North America tab will open the State & Province Profiles page. This page consists of a map of the U.S. and Canada showing the 50 U.S. states, the District of Columbia, and ten Canadian provinces.

You may view the state or province profile by clicking on the state or province in the map or the state or province name.
State/Province Profile Page

The State/Province Profile page header includes the name of the state or province and the date it was updated.

The column on the left has several sections. The top section has one link: All States. This will return you to the North America tab.

The second section is the table of contents for the profile. Clicking on one of the chapter titles will open that section of the profile in the main content area.

The Related Industries section lists the industries that are related to the state/province displayed. Clicking on one of these industries will open the Industry Profile page for that industry. See page 8 for information about the Industry Profile page.

The main content area of the page displays the profile. The initial display includes all the sections in one long scrolling page. Once you click on a section title in the table of contents only that section will be displayed. You may display the entire profile again by clicking on the Back to State Profile link at the bottom of the section.

The Big Picture section gives you a short overview of the state/province’s economic status.

Other sections of the profile are Employment Data, Major Industry Update, Local Real Estate Summary, and Website Resources.
Sales & Marketing Tab

Clicking on the Sales & Marketing tab will open the Sales & Marketing Templates page. This page consists of a list of templates that you may use in your communications with business contacts.

Clicking on the arrow icon by each template title will open the template in the space below the title.

Each template gives you canned text in letter format with sections noted where you add your own data.

![Sales & Marketing Templates](image)

These templates may be used for e-mails, voice mail, and letters.
Industry Prospector Tab

Clicking on the **Industry Prospector** tab will open the *Industry Prospector* page. While this function was designed for sales or marketing efforts it allows you to select and rank industries based on industry drivers and key economic metrics.

The page has five boxes with drop-down menus. These menus allow you to select a variety of displays, one at a time. Each selection will display a list of industries ranked according to the criteria selected in the menu.

The boxes are: **Financial Metrics** (with more than 25 selections in three categories), **Human Resources Metrics** (with two selections), **Industry Drivers** (with seven selections), **Forecast Growth** (just one selection: **Industry Growth Forecast**), and **International Trade** (with four selections).

Clicking on a selection opens the page for that criteria (e.g., Employment Growth). Each list may be downloaded to Excel by clicking on the **Download List** link. Also, the list may be resorted to show the bottom of the list first by clicking on the arrow in the last column.

Clicking on the industry name will open the *Industry Profile* page for that industry. See page 8 for information about the *Industry Profile* page.
International Tab

Clicking on the International tab opens the International page. This page has a search feature that allows you to search for industry profiles using a keyword search. You may enter a keyword, NAICS code or SIC code.

There is also a link to Browse for Global Content, see page 16 for information about this feature.

This page also has boxes with additional links and information. The boxes are: Canadian Profiles (see page 17), International News (see page 17), Countries (see page 18), and Tools and Resources (see page 18).

Search for Industry and Geographic Profiles—Keyword Search

When the International page opens, the Keyword search function is displayed. This is a simple search function with only one box for search term entry.

To perform a search, enter your search term (Keyword, NAICS, SIC) into the box and click on the Search button. This will open an International Industry Search page with the industry profiles found in your search listed.

Each entry on the list includes the name of the industry profile and a short information line about the profile. Each entry also includes the NAICS & SIC codes that are included in that profile.
Clicking on the industry name will open the Industry Profile page for that industry. See page 8 for information about the Industry Profile page.

**Search for Industry and Geographic Profiles—Industry Code Searches**

To search using industry codes, enter a code number into the data field and click on the Search button.

The program automatically searches for NAICS codes to match the code you entered. The International Industry Search page that is opened with your search results lists all the NAICS codes that matched your code.

Each entry has the industry name and the NAICS codes included in that industry. Clicking on the name of the industry profile will open the Industry Profile page for that industry. See page 8 for information about the Industry Profile page.

If you want to search for SIC codes, click on the Would like to search by SIC Code? Please click here link below the data field. This will rerun the search using your code to search for matching SIC codes.

The International Industry Search page that is opened is similar to the page opened for the NAICS search.

**Browse for Global Content**

There is a Browse for Global Content link below the search box on the International page. Clicking on this link will open an International Industry Search page with a list of industry sectors. You may use this list to browse for industries.

Each International Industry Search page also has a Browse for Industry Profiles section on the right side of the page. You also may use this feature to browse for industries. These are listed alphabetically while the sectors list groups the industries by type (sector).
On the *International Industry Search* page, each entry on the list is a header for a major sector of industry. You may open the various sectors by clicking on the arrow icons next to each header. This will expand the selected sector to include all the industries included in that sector.

Each entry on this list is a link to that industry’s *Industry Profile* page. See page 8 for information about the *Industry Profile* page.

The small globe icon indicates that the Industry Profile includes global insights.

The alphabetical listings operate in a similar manner. The heading may be expanded to display all the industries included in that heading. Each entry on this list is a link to that industry’s *Industry Profile* page. See page 8 for information about the *Industry Profile* page.

**International Tab Boxes**

The International page includes some boxes that contain useful information and links. These boxes are: Canadian Profiles, International News, Countries, and Tools and Resources.

**Canadian Profiles**

The Canadian Profiles box has a list of industry profiles that have Canadian connections. Clicking on a title will open the *Industry Profile* page for that industry.

**International News**

The International News box has a list of articles about international topics. Clicking on a title will open the full text article in a new window. The articles are displayed through Factiva. You must agree to the terms of use agreement for Factiva that is displayed before the article is opened.
Countries

The Countries box has a list of world regions. Each item is a link that will open a page that region (or All Countries). The Countries of Africa page is pictured. The region page lists all the countries in that region. The display shows the flag and name of each country. All region pages are similar.

The name and flag are links that will open the Country Profile page for the selected country.

The Country Profile page for the United States of America is pictured. All country profile pages are similar.

The page header includes the name of the country, its region, and the date it was updated.

The column on the left has several sections. The top section has one link: All Countries. This will open the Country Information page with a display of all the countries included in the database.

The Regional Countries section lists the countries that are in the same region as the country being researched. Clicking on one of these countries will open the Country Profile page for that country.

The main content area of the page displays the profile. This profile includes several brief risk analyses and sections for Recent News, Key Facts (with a map), and Country Overview.

Tools and Resources

The Tools and Resources box has links to tools. The number varies from time to time.

The International Acronyms and Global Web Links selections will open the International Resources page with links to various websites and a list of acronyms.

International Trade will open the Industry Prospector tab so you may use the selections in the International Trade data field to display various lists of international industry. See page 14 for information about the Industry Prospector tab.
Canadian Profiles will open the Canadian Resources page. This page has a list of Canadian Focus Profiles. Clicking on an item will open the Industry Profile page for that item. See page 8 for information about the Industry Profile page.

The Canadian Resources page also has a list of links to Canadian websites.

**Footer Links**

The First Research program footer has four groups of links: Support Center, Intelligence on the Go, First Research Products, and Partner Network Sites.

**Support Center**

The Support Center section has three links: FAQs, About Us, and Contact Us/Feedback.

The FAQs link will open the Frequently Asked Questions page. This page has a list of questions. Each question will scroll the page to the answer.

The About Us link will open a page with information about First Research. The Contact Us/Feedback link will open a page with contact information.

**Intelligence on the Go**

This section has links to the First Research Facebook page and Twitter.

**First Research Products**

This section has links to the Industries tab (see page 5), North America tab (see page 11), International tab (see page 15), and Industry Prospector tab (see page 14).

**Partner Network Sites**

This section has links to other companies’ (associated with Mergent) websites.