

Search Features

Dialog Intelliscope

Dialog Intelliscope offers a variety of superior workflow tools to maximize the search and retrieval process.

BASIC SEARCHING

Select the Search tab from the top menu bar to access the search screen. You can search using Free Text, Titles or Company Look-up. You can also create a search from any combination of search categories and save it for future reference.

The screenshot shows the Dialog Intelliscope search interface. At the top, there is a navigation bar with 'SEARCH', 'ALERT', 'POST & SHARE', and 'CUSTOMIZE' tabs. Below this, there are links for 'ALL DATABASES', 'BROKER RESEARCH', and 'FIRST CALL NOTES'. The main search area includes a 'FREE TEXT' search box, a 'SEARCH' button, and a 'New Feature' link. There are also 'Saved Searches' and 'Options' sections. The 'Options' section includes 'Save Search', 'Clear Search', 'Rename Search', 'Delete Search', and 'Add Search To Alert'. The 'Report Options' section includes 'View Basket' and 'Basket Count'. The search criteria section includes 'Free Text', 'Title', and 'Company Lookup' options. The 'Company(s) Found' and 'Company(s) Selected' sections are visible at the bottom.

TIP: Select the **Customize** tab from the top menu to change your default screen and other preferences, such as detailed or summary citations, sort order, date format or e-mail alert frequency. Enter values for the settings you want to change and click Save.

ADVANCED SEARCHING

Advanced search features are available to refine your strategy. Included search options are free text, best passage, title only, industry, company and geography plus criteria specific to the selected data source, such as contributor, author or report number.

- Select the Search tab from the top menu bar.
- Select the data source under the Search tab.
- Select the search criteria using the same method as a regular search.
- Click the **Search** button.

The screenshot shows the Dialog Intelliscope search interface with advanced search options. The 'Options' section includes 'Save Search', 'Clear Search', 'Rename Search', 'Delete Search', and 'Add Search To Alert'. The 'Report Options' section includes 'View Basket' and 'Basket Count'. The search criteria section includes 'Free Text', 'Title', 'Company Lookup', 'Geographic Area(s)', and 'Contributor Lookup'. The 'Geographic Area(s) Found' and 'Geographic Area(s) Selected' sections are visible. The 'Contributor(s) Found' and 'Contributor(s) Selected' sections are visible. The 'Author' section is also visible. The 'Select Report Type' section includes 'All Reports', 'Company Only', and 'Industry Only'. The 'Search By Report Number' section is visible at the bottom.

TIP: Perform a quick search from any screen by typing terms in the **Free Text** box in the left navigation bar. Click **Search** to display the results.

BATCH DOWNLOADING - NEW!

This new feature allows you to select multiple reports and add them to a virtual basket. With a single click, you can download and print selected documents.

Check the reports you'd like to save from any of the product result set and click **Add to Basket** in the left navigation bar. An icon will appear next to the selected reports indicating they've been added to your basket.

SEARCH RESULTS New Feature

Search: New Search
(Free Text - gateway) and (Best Passage - Off) and (Industry - All) and (Geography - All) and (Date - Last Month)
[Broker Research](#) [First Call Notes](#)

DISPLAY
Summary Citation
Detailed Citation
Citations / Page 5

SORT BY
Publication Date
Relevancy
[Update View](#)

REPORT OPTIONS
[View Basket](#)
[Add to Basket](#)
[Open First Call Notes](#)
Basket Count: 5

OPTIONS
[Save Search](#)

<input type="checkbox"/>	75%	03/16/2004	PROVIDIAN FINANCIAL CORPORATION Author: BALDI, J.P., ET AL Source: J.P. MORGAN	4 pgs.	#7919406 Preview >
<input type="checkbox"/>	77%	03/16/2004	SPECIALTY FINANCE - FEBRUARY CREDIT QUALITY Author: ORENBUCH, M., ET AL Source: CREDIT SUISSE FIRST BOSTON CORPORATION	6 pgs.	#7919551 Preview >
<input type="checkbox"/>	84%	03/15/2004	PROVIDIAN FINANCIAL CORPORATION Author: BALL, B., ET AL Source: PRUDENTIAL EQUITY GROUP, INC.	5 pgs.	#7919531 Preview >
<input type="checkbox"/>	81%	03/15/2004	AP TECH DAILY Author: SHAH, B., ET AL Source: J.P. MORGAN	14 pgs.	#7914396 Preview >
<input type="checkbox"/>	78%	03/15/2004	RYAN BECK BANKING REVIEW - VOL. 2 NO. 10 Author: REEVEY, K.K., ET AL Source: RYAN BECK AND CO.	10 pgs.	#7913434 Preview >

Click **View Basket** to see a table of all the reports in your basket. The Report Options in the left navigation bar allow you to save, print or remove the selected batch of reports.

REPORT OPTIONS
[Save Selected](#)
[Print & Save Selected](#)
[Remove Selected](#)
Basket Count: 5

POST & SHARE

Post & Share lets you create folders to organize and share reports across your enterprise.

- Place a check in the box next to the citation you want to save.
- Click either Add to Public Folder or Add to Private Folder.
- Name the folder.
- Press Enter, or click New Folder.

PUBLIC FOLDER

[Add to Public Folder](#)
 [Add to Private Folder](#)

ALL PUBLIC FOLDERS
 [Public Folder](#)
 [Private Folder](#)
 [Shared Folder](#)
 [New Folder](#)

ALL PRIVATE FOLDERS
 [Private Folder](#)
 [New Folder](#)

ALL SHARED FOLDERS
 [Shared Folder](#)
 [New Folder](#)

ALL DOCUMENTS
 [Document](#)
 [New Document](#)

TIP: If you have the **Add To Private Folder**, **Add Folder**, **Rename Folder**, **Empty Folder**, **Delete Folder**, **Move Citation** and **Delete Citation** buttons, you have full **Post & Share** privileges. If not, you may only view the contents of the folders or save them to a private folder for your personal use. To receive full privileges, contact your system administrator.

Customer Service & Support

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