

Insight is a web-based tool for finding, viewing, managing and sharing up-to-date equity and fixed income research from both internal and external sources.

Access Insight via the **My Workstation Tools** module. (If Insight is not a displayed option, click **Customize** in the upper-right corner, then select the checkbox for Insight to add it to your workstation tools.)

## My Updates Tab

When Insight is launched, you'll see the **My Updates** tab, which displays the analysts, companies and reports viewed most recently. On this tab, you can add modules based on a saved search, subscription or your most read research.

The screenshot shows the Insight web application interface. At the top, there is a search bar with the placeholder text "Enter ticker, company or analyst..." and an "Advanced Search" button. Below the search bar is a navigation bar with three main sections: "Provider & Product", "Fundamental Ratings", and "Provider Team". To the right of these sections are icons for Home, Settings, Search, Feed, and Briefcase. Below the navigation bar, there are several report cards for "GLOBAL INSIGHT WEEKLY" and "GLOBAL INSIGHT MONTHLY". The main content area is titled "My Updates" and "All Reports". It features a "Refresh" button and a timestamp "As of Tuesday, February 26, 1:28 pm ET". There are two main sections: "RECENTLY VIEWED COMPANIES" and "RECENTLY VIEWED ANALYSTS". The "RECENTLY VIEWED COMPANIES" section lists companies like Cisco Systems Inc, Microsoft Corp, Dick's Sporting Goods Inc, NetApp Inc, and Michael Kors Holdings Ltd, each with a "New Reports" count. The "RECENTLY VIEWED ANALYSTS" section lists analysts like Charles Fishman, CFA and Elvira Scotto (CFA), each with a "New Reports" count. On the right side, there is an "ADD A MODULE" button. Callout boxes provide instructions on how to use the search field, browse by Provider & Product, Fundamental Ratings, and Research Team, update or view key information via icons (Gear, Search, Feed, Briefcase), and click Add a Module to add a standard module or a module based on a saved search or subscription.

Use the **Search** field to look up research by symbol, company or an analyst's last name. To search using additional criteria (like provider or asset class), click **Advanced Search**.

Browse and view research by **Provider & Product**, **Fundamental Ratings** and **Research Team**.

Update or view key information via these icons.

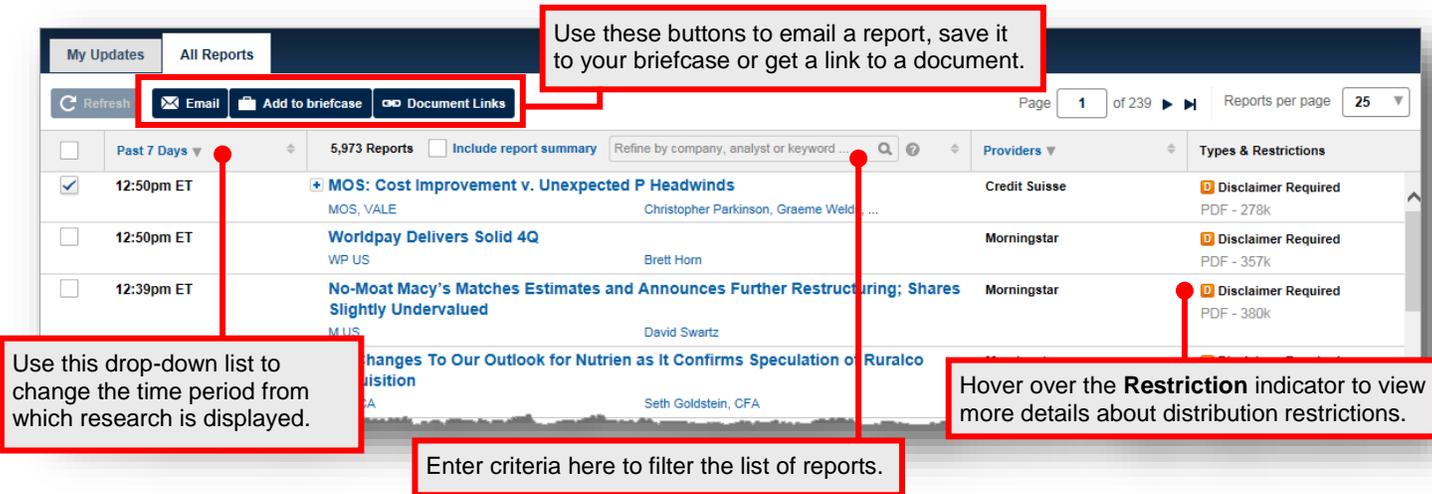
- **Gear** icon: Update your preferences
- **Search** icon: View your saved searches
- **Feed** icon: See your subscriptions
- **Briefcase** icon: View the reports in your briefcase

Click the **Gear** icon to remove or change a module.

Click **Add a Module** to add a standard module (like Recently Viewed Reports) or a module based on a saved search or subscription.

## All Reports Tab

The **All Reports** tab displays all research available for a set period of time (the default is seven days).



Use these buttons to email a report, save it to your briefcase or get a link to a document.

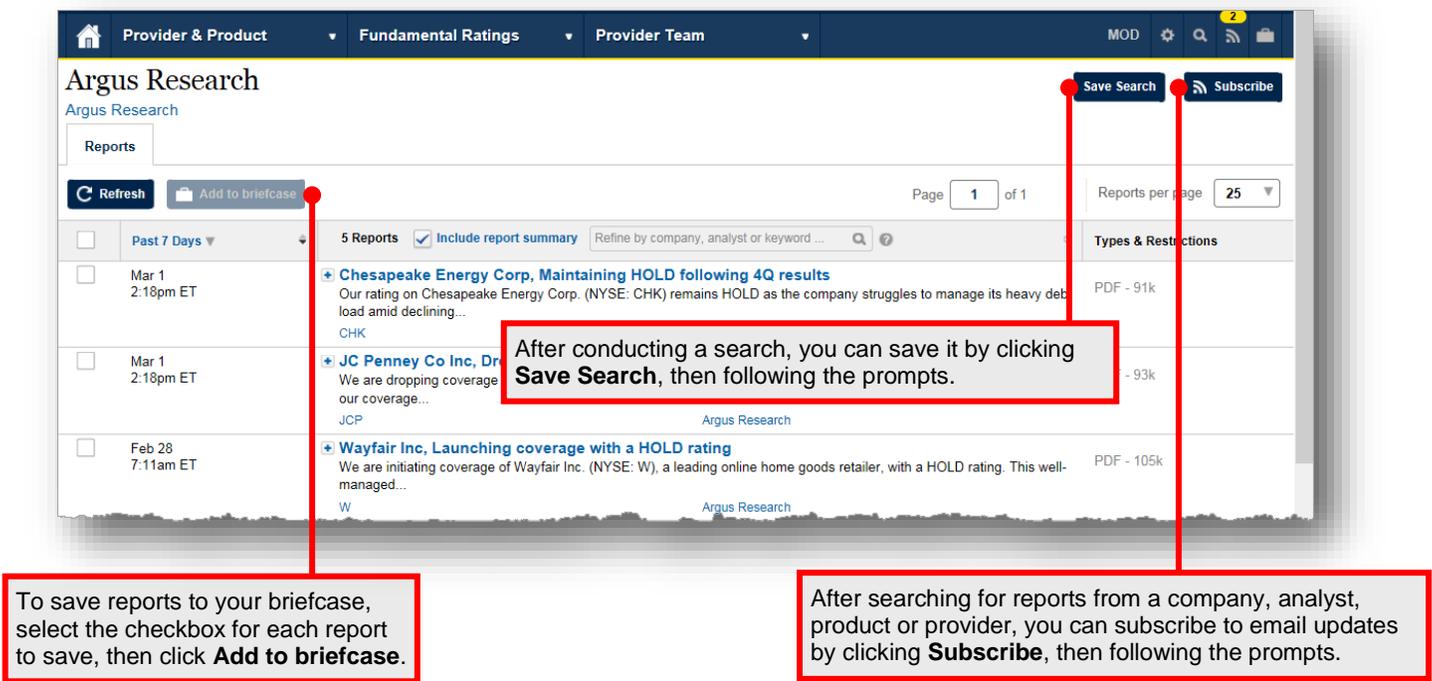
Use this drop-down list to change the time period from which research is displayed.

Enter criteria here to filter the list of reports.

Hover over the **Restriction** indicator to view more details about distribution restrictions.

## Viewing Reports

When you use the drop-down lists or the search function to look for research, Insight will display a list of results. Click on any item to open it as a .pdf file in a new window.



After conducting a search, you can save it by clicking **Save Search**, then following the prompts.

After searching for reports from a company, analyst, product or provider, you can subscribe to email updates by clicking **Subscribe**, then following the prompts.

To save reports to your briefcase, select the checkbox for each report to save, then click **Add to briefcase**.

## Support

- “How do I” questions, as well as questions about Insight functionality, can be addressed to the Business Applications Training & Support (BATS) team at (800) 949-0242, option 1.
- Additional instructions for using Insight are available in the Insight section of the Systems User Guide.