



**YOUR BEGINNER'S GUIDE**

# Getting Started with ARchitect





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# Dashboard

Create, search and report here.

Search Analysts, Interactions, Coverages, Firms, Emails.

Navigate to most recent interaction, mentions, and profiles.

View relationship visually with heat map.

Check-off tasks for next steps on Interactions & Projects.

View notifications on team Interactions, new projects, recent research, media quotes, blogs, tweets.

View and navigate to upcoming and past interactions in calendar view.

ANALYSTSINTERACTIONSCONTENTEMAILPROJECTSSITEHELP

Search

Dashboard

This Week  
Jun 27 - Jul 3

1  
Interaction

1  
Active Project






0  
Notifications

0  
Research Articles

0  
Mentions


Relationships


Past 6 Months

Analyst	Infl. Score	Research	Mentions	Percept.	Ints	Last	Next
 Carl Olofson IDC	61.55	15 Published 8 Planned					
 Garrett Bekker 451 Research	53.17	18 Published 0 Planned					
 Kenneth Liew IDC	26.27	5 Published 0 Planned					
 David Marshall VMBlog.com	0	0 Published 0 Planned					
 Norbert Deuschle Storage Consortium	6.83	0 Published 0 Planned					

Page 1 of 2

Notifications

 James Gong  
New Analyst Added

 Christophe Bertrand  
Veeam roadmap: Cloud, containers, virtual VeeamON 2021

View More

All Notifications >>

Tasks

☐ Praesent et ligula  
Project Task  
7 months ago

☐ Nulla fringilla pede  
Project Task  
5 months ago

☐ Sed imperdiet, leo ut ...  
Project Task  
5 months ago

☐ Morbi sem  
Project Task  
In 1 day

☐ Pellentesque porttito...  
Interaction Task  
In 2 weeks

☐ Ut cursus

Scheduling

Calendar

TodayNovember, 2020

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25 Nulla fringilla pede. Ut cursus. Morb	26	27	28 Quisque in nulla. Nullam faucibus nunc Proin sed nulla. Nulla hendrerit	29	30	31 Nulla facilisi. Pra
01	02 Quisque in nulla. Nullam fau	03	04	05 Aliquam blandit lacinia sem. Nam	06	07
08 Proin sed nulla. Nulla hendrerit	09	10	11 Lorem ipsum dolor sit amet, consectetur	12	13 Lorem ipsum dolor sit amet,	14



# Analyst Profile: General Information

**General Analyst info:** Name, firm, title, location, email & phone number(s). Social Media Links

Mr. Patrick (Pat) Moorhead *Analyst*

Moor Insights & Strategy  
Founder, President and Principal Analyst

in

200 Congress Ave  
Unit 39SP  
Austin, TX 78701  
United States

✉ patrick@moorinsightsstrategy.com  
☎ +1-512-968-8285

Interaction Ranking ★★★★★

Publication Ranking ★★★★★

Information

Activity

Twitter

Bio

Patrick founded the firm based on in his real-world world technology experiences with the understanding of what he wasn't getting from analysts and consultants. Four years later, Patrick is consistently ranked in the top echelon of all technology industry analysts in terms of "power" (via ARInsights) and is consistently top ranked in "press citations" (via Apollo Research). He is a...

show more ▼

Coverages

+ Manage Coverages

Collaboration

Converged Infrastructure

IaaS

IoT

Networking

PaaS

Personal Computing (PC)

Private Cloud Services

Public Cloud

SaaS

Semiconductors

Server

Smartphones

Software Defined Infrastructure

Storage

Video Conferencing

Inquiry Procedure

For more information about Moor Insights & Strategy, please contact them...

show more ▼

Email Status

Subscribed ([Unsubscribe Analyst](#))

Our Take

This is a site-private text field.

Analyst Groups

The Real Analyst Universe

Aaron's Analyst Group

Analysts on Portal

Relationship Manager

(not specified)

Private Data 

+ Add New

Rankings are on a scale of 1-5 stars.

**Interaction Ranking** indicates the level of interaction this Analyst has had with ARchitect's community of users.

**Publication Ranking** represents how much this analyst has been publishing. The Publication Ranking takes into account all research articles, media quotes, blog posts and tweets from ARchitect Premium Content.

Coverages are a quick way to identify which topics an analyst covers.

4


# Analyst Profile: Find your specific information

Mr. Patrick (Pat) Moorhead

Analyst

Edit Analyst

Follow



Moor Insights & Strategy

Founder, President and Principal Analyst

in

200 Congress Ave

Unit 39SP

Austin, TX 78701

United States

patrick@moorinsightsstrategy.com

+1-512-968-8285

Interaction Ranking

Publication Ranking

Information

Activity

Twitter

Interactions (2)

Articles (1)

Emails

Projects (1)

This year

View in Finder

Add New Interaction

Title	Date	Type	Initiator	Analysts
Interaction	7/16/2021	Briefing	Valladares, Trish	Patrick Moorhead
Interaction	6/30/2021	1:1	Valladares, Trish	Patrick Moorhead

1

10

items per page

1 - 2 of 2 items

Email Status

Subscribed (Unsubscribe Analyst)

Our Take

This is a site-private text field.

Analyst Groups

Analysts on Portal

Relationship Manager


(not specified)

Private Data

Add New

Tiering

No Tiering

**ACTIVITY** tab: this is where you can find all your Interactions, saved Articles, Emails, and Projects for the analyst. Click the area you want to view and be sure to set the appropriate time frame. Clicking the lock  will set the default tab you want to open when reviewing any activity.

**Follow Analysts:** Adds the analyst to the top navigation area “bookmarking” the analyst to quickly view the profile.

**Our Take:** Leave comments about this analyst for your team members.

**Analyst Groups:** View/edit your groups from the profile.

**Relationship Manager:** Define who owns this relationship.

**Privacy Options:** Keep record of “no email/call/Mailing”.

**Private date:** Add site/group/user specific fields.

**Tiering:** Add tiering to the analyst profile.

# Finders: Analysts, Firms, Interactions, Articles & More

Use filters to search the database for analysts.

The screenshot shows the 'Analysts' section of a web application. At the top, there's a header with 'Analysts', '+ Add New Analyst', and tabs for 'GRID', 'REPORTS AND BRIEFING BOOKS'. Below the header, there's a search bar with 'Add Filter(s)', 'Begin typing for results', and a 'Search' button. To the right are 'Load View', 'Save View', and 'Quick Search' buttons. A modal window titled 'Select a Filter Type' is open, showing a dropdown menu and 'Cancel'/'Update filters' buttons. The main content is a table with columns: 'Interaction Ranking...', 'Publication Ranking', 'Coverages', 'Email', and two empty columns. The table lists analysts like Merv Adrian from Gartner Inc. and Anurag from Techaisle. At the bottom, there's a pagination bar with '100 items per page' and '1 - 100 of 21706 items'.

This is a close-up of the 'Select a Filter Type' dropdown menu. It lists various filter categories: Analyst Group, Analyst Type, Analysts In-Transit, AR Power 100, Country, Coverage, Email Subscribed, Event, Firm, Following, Last Name Starts, Location, Region, Relationship Manager, State, Tier, and Twitter Followers. The 'Select a Filter Type' option is highlighted at the top.

**Filter Tips:**  
**Search all filter types:** You can search by analyst name, analyst firm, analyst group, coverage and keywords without having to select the specific filter type.  
**Analyst Type** – Most will be “Analyst”, but some profiles can be the following types: Advisory, Analyst, Consultant, Editor/Writer, Executive, Other, Procurement Consultant, Research & Sales.  
**Coverages** – Search by analyst research “coverage”. See further explanation of coverage on slide 19.  
**Keyword**– This field will allow you to search specific terms within the analyst Bio and coverage.  
**AR Power 100** – Top 100 analysts ranked according to their activity level among all ARchitect users .  
<http://www.arinsights.com/architect-power-100/>  
**Followers** – Filter the database by analyst's Twitter following.
















# Finders: Using the Grid, bulk updates, and views

**Analysts** + Add New Analyst **GRID** **REPORTS AND BRIEFING BOOKS**

Add Filter(s)  Search Load View Save View Quick Search

Keyword Search:  × Clear Filters

Export Columns Reset Grid Full Screen On

<input type="checkbox"/>	Photo	Analyst	Firm	Interaction Ranking...↓	Publication Ranking	Coverages	Email		
<input type="checkbox"/>		Frank Della Rosa	IDC	★★★★★	★★★★★	Analytics, Applications, Blockchain, Cloud Computing, Cloud Services, Platforms, SaaS	fdellarosa@idc.com		
<input type="checkbox"/>		Paul Miller	Forrester Research, Inc.	★★★★★	★★★	3D Printing, AR/VR, Cloud Computing, Digital Transformation (expanded search), Edge Computing, IoT, Manufacturing, Public Cloud	pmiller@forrester.com		
<input type="checkbox"/>		Arnal Dayaratna	IDC	★★★★★	★★★★★	Analytics, Application Development, DevOps, Software Development	adayaratna@idc.com		
<input type="checkbox"/>		Joel Martin	HFS Research	★★★★★		Cloud, Collaboration, Customer Experience (CX), DevOps, Edge Computing, Enterprise Applications, Hyperscale, Low Code Development Platforms, PaaS, SaaS, Service Providers	joel.martin@hfsresearch.com		
<input type="checkbox"/>			Cloud			Cloud Computing, Cloud			

100 items per page 1 - 51 of 51 items Apply a bulk update

**Export** can export the data as it appears in the grid or all fields.

**Columns** can be adjusted by being (de)selected.

**Reset Grid** will reset to default settings.

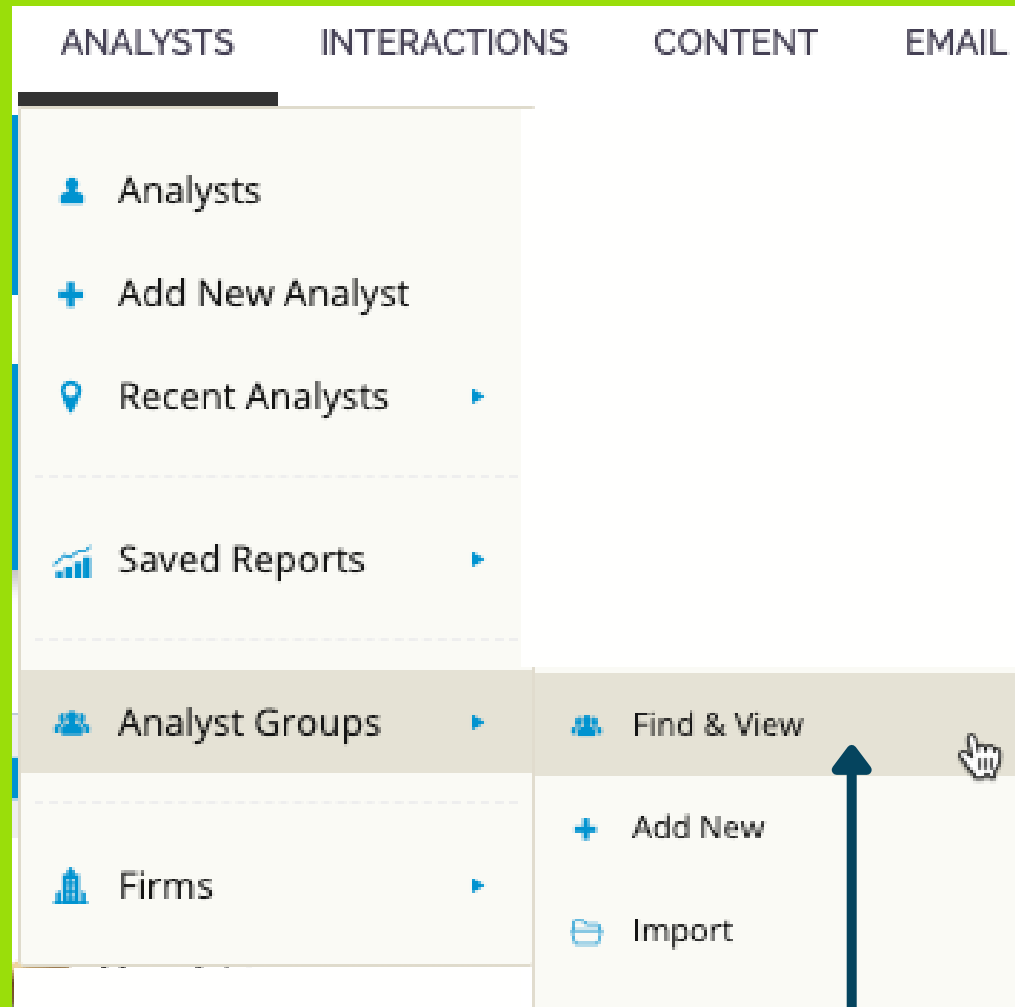
**Save and load Views:** this will reload filters and grid settings.

**Sort Columns** by clicking on the header.

**Bulk updates** allow you to update records or create analyst groups with one click.

Be sure to use the check boxes on the right side of the grid to select the items to bulk update.

# Analyst Groups: Group your Analyst by Topic/ Tiering to organize your targeted Analysts



Create an Analyst Group.  
ANALYSTS > Analyst Groups

View analyst groups in a list or in a tree view.

The screenshot shows the 'Analyst Groups' interface in 'LIST' view. The top bar includes a '+ Add New Group' button and tabs for 'LIST' and 'TREE'. Below the header is a search bar with 'Add Filter(s)', a text input 'Begin typing for results', and a 'Search' button. The main table displays the following data:


Group	Owner	Visibility	Number of Analysts	Number of Children	Last Modified ↓						
Tier 1 - Cloud	Crystal Jane	Event Planning	4	0	1/29/2021 8:33 AM Crystal Jane						
Master List	Crystal Jane	Event Planning	0	3	1/22/2021 1:40 PM Crystal Jane						
Tier 1 Analyst Gartner	Crystal Jane	Event Planning	2	0	1/22/2021 1:39 PM Crystal Jane						
Gartner Tier 1	Crystal Jane	Event Planning	3	0	1/11/2021 9:38 AM Crystal Jane						

The screenshot shows the 'Analyst Groups' interface in 'TREE' view. The top bar includes a '+ Add New Group' button and tabs for 'LIST' and 'TREE'. Below the header is a search bar with 'Add Filter(s)', a text input 'Begin typing for results', and a 'Search' button. The main area displays a tree structure of analyst groups:

- ▶ ARInsights Analyst Group
  - ▶ Master List
  - ▶ Master List
  - ▶ New Analyst Group
  - ▶ Tier 1 - Cloud
  - ▶ Tier 1 Analyst Gartner



# Analyst Groups: Add New

 New Analyst Group

CancelSave

Name & Description

Name \*

Description

Basics

Owner

Jane, Crystal

Alternate

(none)

Visibility

Public - All of Event Planning

Edit Permissions

Public - All of Event Planning

Include in Dropdowns

☐

Sync to Outlook

☐

Follow Twitter

☐

Analysts

Pick

Analyst Name

Choose Analyst

Analyst Groups

Analyst Group

Choose Analyst Group

CancelSave

← Name your Analyst Group.

← Add analysts to groups by typing in their names in "Analyst Name" area.

← Associate subgroups to create a master group.

Be sure to mark the **Visibility** and **Edit Permissions**. This will allow others to see and edit your groups.

You can also give another members permission to edit your groups by assigning "Alternate".

# Briefing Books: Creating Briefing Books

In the Analyst Finder, you have the option to create a Briefing Book.

First, use the filter to target the analysts you need in the Briefing Book.

Then click "Reports and Briefing Books". Next, select Analyst Briefing Book (for generic Briefing Book) or Word Briefing Book for a custom document from an uploaded template.

The screenshot displays the 'Analysts' interface. At the top, there's a header with a user icon, the title 'Analysts', and buttons for '+ Add New Analyst', 'GRID', and 'REPORTS AND BRIEFING BOOKS'. Below the header, there's a search bar with 'Add Filter(s)', a text input 'Begin typing for results', and a 'Search' button. To the right of the search bar is a dropdown menu for 'Load a saved report' and a 'Clear Filters' button. A blue box highlights the search bar area, and a blue arrow points to it. A dropdown menu is open, showing options: 'Create new report' (checked), 'Custom Report', 'Briefing Book', and 'Word Briefing Book'. Below the search bar, there's a section for 'Analysts' with two tags: 'Adelaide O'Brien' and 'Lydia Leong'. A blue arrow points to this section. The main content area is titled 'Analyst Reports' and is divided into two sections: 'Create a new report' and 'Load a saved report'. The 'Create a new report' section lists three options: 'Analyst Custom Report' (with a 'New' button), 'Analyst Briefing Book' (with a 'New' button), and 'Word Briefing Book' (with a 'New' button'). A blue box highlights the 'Analyst Briefing Book' and 'Word Briefing Book' options, and a blue arrow points to it. The 'Load a saved report' section shows 'No saved analyst reports'.

# Briefing Books: Templates and Options

Select the **Word template file** and Output Format.

**Article/Interaction Sub-report Options** allows you to define the time period and number of Articles and/or Interactions you want to include in your Word Briefing Book. \*\*note these have to be added to the analyst profile prior to creating the Word Briefing Book.

Next, click **Run Report**.

The file will download and is editable.

Word Briefing Book

Close

Briefing book template

Word template file

ARchitect Grid (Nested) Template

Output Format

.docx - Microsoft Word 2007-2010

MS Word Merge Instructions and Starter Templates

Upload Your Template

Article Subreport Options

Add Filter(s)

This year

Begin typing for results

Search

Interaction Subreport Options

Add Filter(s)

Year to date

Begin typing for results


Search

Layout Options

☐ Sort by Firm, then Analyst Name

☐ Sort Interactions ascending

☐ Sort Articles ascending

Executive Briefing	
ARchitect	
Subtitle	
Background Info: Text Text	
Analyst Biographies	
Analyst	Bio
 Gartner Inc. Lydia Leong Distinguished Vice President and Analyst	<p>21 years at Gartner , 28 years industry experience Arlington, VA USA</p> <p><b>Roles and Responsibilities</b> Lydia is a Distinguished VP and Analyst with Gartner for Technical Professionals (GTP). His coverage is focused on cloud computing and infrastructure strategies, particularly infrastructure as a service (IaaS), along with platform as a service (PaaS) as it intersects IaaS. She also covers a constellation of related topics, such as cloud strategy, management and governance; cloud managed service providers (MSPs); and cloud operations including DevOps. Because cloud computing is reshaping the IT landscape, her research covers a broad range of topics related to the transformation of IT organizations, data centers and technology providers. Over the course of her Gartner career, she has worked in all three of Gartner's major research divisions, advising business and technical leadership at end-user organizations and vendors, as well as investors. She was Gartner's Analyst of the Year in 2010.</p> <p><b>Background</b></p> <p><b>Previous Experience</b> Prior to joining Gartner, she held various technical and management positions in the internet industry, including Director of Server Engineering at Excite@Home and director of product engineering and operations at Digex/Intermedia Communications. Her prior roles have included product management, systems architecture, large-scale data center</p>



# Interactions:

Interactions can be entered into ARchitect directly in the UI, by using the Outlook Plugin or Smart Email Capture.

This is the Interaction Form within ARchitect's UI.

Title of Interaction Eg. "Call to discuss Stress Testing with David O'Connell, Aite Group"

Description is the meeting details

Basics:  
Set the Type, Date, Time (& time zone if different from your user profile)

Initiator/ AR Primary, are AR team members

**New Interaction**

Cancel Save & Invite Save

**Title & Description**

Title \*  
Description \*

**Basics**

Event Choose Event ...  
Interaction Type \* (choose one)  
Date \*  
End Date  
Initiator Jane, Crystal  
AR Leader Jane, Crystal  
Location

**Details**

Notes  
Other Participants  
Visibility Public - All of Event Planning  
Edit Permission Public - All of Event Planning  
Team Calendars (none) Research Research 2

**Analysts**

Analyst Name  
Choose Analyst

**Participants**

+ New Pick  
Participant Name  
Choose Participant

**Coverages**

Products...  
Regions...  
Topics...  
Verticals...

**Project**

+ New Pick  
Select a Project

**Attachments**

Select files...

Add internal Participants.

Add the coverage, what is the topic of this interaction?

File your interaction into a Project.

Attach any relevant documents.

Details:  
Leave extra meeting notes.

Set visibility and edit permissions.

\* \* Note: These fields can be changed with custom fields.

# Interactions: Smart Email Capture

Name your CC or BCC architect@arinsights.com into your email messages or calendar invites.

MessageOptions

Send

Paste

Calibri (Bo...11A^A^A^

B I U ~~ab~~ x<sub>2</sub> x<sup>2</sup> A

From:tvalladares@arinsights.com

To:Crystal Golightly

Cc:

Bcc:ARchitect

Subject:Smart Email Capture

Organizer MeetingFormat Text

SendCancel

AppointmentScheduling

New EmailReply All

Add Teams Meeting

From:Calendar - tvalladares@arinsights.com

To:Crystal GolightlyARchitect

Subject:TBA

Location:

Duration:30 minutesAll day event

Starts:6/29/20211:30 PM

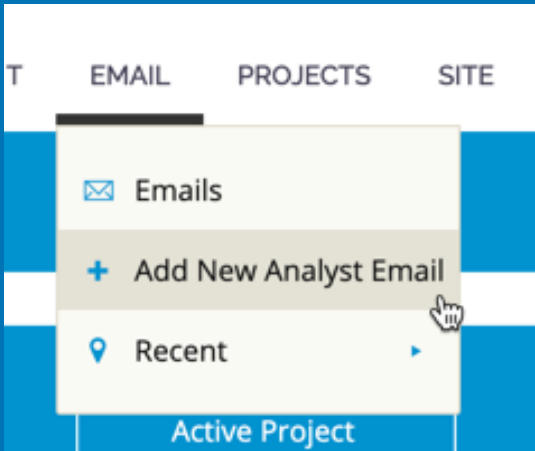
Ends:6/29/20212:00 PM

This invitation has not been sent.

Adding architect@arinsights.com to the BCC line will send the email into ARchitect as an interaction.

You will need to adjust the "Interaction Type", Coverages, and potentially add the Analyst to the record.

# Emailer: Bulk send emails to your analysts using Analyst EMailer



Under “Emailer” in the menu bar, select “Add New Analyst Email” to start your email distribution.

Email Options:  
Add coverages, projects, or set visibility.

In Advanced Options, send a copy to “Reply-To”, create an interaction from the email, or deliver on behalf of a user.

**New Email** [Cancel] [Save]

**Details**

Subject \* [Text Field] From \* [Text Field]

Title [Text Field] Reply-To \* [Text Field]

**Content** [Load Template] [Load From Email] [Upload HTML]

[Create New Content] Attachments [Select files...]

**Recipients** [Add Analysts] [Add Participants] [Load Recipients]

[No Recipients Selected]

**Options**

Coverages: Products... [v] Regions... [v] Topics... [v] Verticals... [v]

Project: [Select a Project] [Pick]

Visibility: Public - All of Event Planning [v]

Advanced Options (show) [v]

**Delivery** [Send Test] [Send Email]

[No Delivery Scheduled]

[Cancel] [Save]

Edit the “From” or “Reply-To” to send emails on behalf of another team member. From is the name ie. Crystal Golightly. Reply-to is the destination email that will receive any replies from analysts.

Re-load previously sent emails, use templates, or upload HTML email file. To edit the email content, click Create New Content.

Add Analysts and/or Participants to this distribution by adding them by typing the name or adding groups. Load recipients from a project or previous email.

Send test email or schedule delivery for a future date.



# Emailer: Bulk send emails to your analysts using Analyst Emailer

When complete, be sure to Preview and Save your email.

Email Designer

Cancel

Preview

Save

CONTENT

ROWS

SETTINGS

T

TEXT

IMAGE

IMAGE

BUTTON

BUTTON

DIVIDER

DIVIDER

SOCIAL

SOCIAL

HTML

HTML

VIDEO

VIDEO

ICONS

ICONS

MENU

MENU

ARInsights

SAVE THE DATE

ARchitect User Forum

Register for this event! Join us as we unveil what's new and how customers are using our products to transform their workflows.

Dec 7-8, 2021

9 AM - 12 PM PST

SAVE YOUR SEAT

Sent by %Site%, Analyst Relations Program

%Address%

%Unsubscribe%

Edit or add rows and columns in Rows.

Adjust general email settings like link colors and content width in Settings.

Add text, image, buttons, dividers, social media links, html code, video links, icons, and menus with the drag-and-drop items.

↶

↷

↺

Use back and forward to un-do and re-do your work to past revisions.

15

# Articles: Where you find the Analyst Research, Blogs, Tweets and Quotes

Articles can be automatically captured, manually added or saved from Premium Content.

\*\*Please contact [edcapps@arinsights.com](mailto:edcapps@arinsights.com) or [cgolightly@arinsights.com](mailto:cgolightly@arinsights.com) for more information about auto capture and Premium Content.

Find the saved Analyst Research, Blogs, Quotes and Tweets under the "Content" area of the main menus bar, then select "Articles".

Use the filters and date box to find the articles you are looking for.

This screenshot shows the filter and date selection interface. On the left, there is a list of preset filters: Future, Today, Yesterday, Past 7 days, Month to date, This month, Last month, Past month, Past 2 months, This quarter, Last quarter, Year to date, This year (selected), Past year, Last year, and Past 2 years. To the right of this list are two calendar widgets for June 2021, each with a 'Custom Range' section for selecting specific date ranges. Below the calendars are 'Cancel' and 'Apply Custom Range' buttons. In the center, there is a 'Select a Filter Type' dropdown menu. At the bottom right, there are 'Cancel' and 'Update filters' buttons.

This screenshot shows the main interface for viewing articles. At the top, there is a navigation bar with tabs for ANALYSTS, INTERACTIONS, CONTENT (selected), EMAIL, PROJECTS, SITE, and HELP. Below the navigation bar, there is a search bar and a 'Search' button. To the right of the search bar are buttons for '+ Add New Article', 'GRID', and 'REPORT'. Below these are buttons for 'Add Filter(s)', 'Year to date', 'Load View', 'Save View', and 'Quick Search'. The main table displays a list of articles. The table has columns for Photo, Date Captured, Title, Analyst Count, Analysts, Firm, and Coverages. Two articles are visible in the table, both dated 3/17/2021. The first article is by Terence Vaughan from Constellation Research, Inc., and the second is by Sherrie King from Constellation Research, Inc. Both articles are related to a Twitter post about a webinar. At the bottom of the table, there is a pagination bar showing '1 - 100 of 1823 items' and a 'Apply a bulk update' button.

Photo	Date Captured	Title	Analyst Count	Analysts	Firm	Coverages
	3/17/2021	Tweet: Join @constellationr's @DHenschen and @FastCompany's @stephaniemeht a today (3/17) at 11 AM ET for an @IBM webinar on building #BusinessResilience. You don't want to miss this! Register here: https://t.co/IFSP9Dta7	1	Terence Vaughan	Constellation Research, Inc.	Building, IBM
	3/17/2021	Tweet: Join @constellationr's @DHenschen and @FastCompany's @stephaniemeht a today (3/17) at 11 AM ET for an @IBM webinar on building #BusinessResilience. You don't want to miss this! Register here: https://t.co/IFSP9Dta7	1	Sherrie King	Constellation Research, Inc.	Building, IBM

# Coverages: Quick reference tags that are assigned to analysts, interactions, or articles

Coverages on Analyst Profiles are 'tags' of analyst research areas. Generally these are added by ARInsights.

You can add your own 'tags' to identify your areas. Click "add coverages".

Coverages are also used on interactions to 'tag' the record with your company's: Brands, Business Line/ Segments, Power Positions, Regions and Topics.

Labeling allows for standardized organization and reporting purposes.

The screenshot shows the profile of Mr. Patrick (Pat) Moorhead, an Analyst. The header includes his name, title, and buttons for 'Edit Analyst' and 'Follow'. Below the header is a bio section with a photo, company name (Moor Insights & Strategy), and contact information. The main content area has tabs for 'Information', 'Activity', and 'Twitter'. The 'Information' tab is active, showing a bio paragraph and a 'Coverages' section with a '+ Manage Coverages' link. The 'Coverages' section displays a grid of tags: Collaboration, Converged Infrastructure, IaaS, IoT, Networking, PaaS, Personal Computing (PC), Private Cloud Services, Public Cloud, SaaS, Semiconductors, Server, Smartphones, Software Defined Infrastructure, Storage, and Video Conferencing. On the right side, there are sections for 'Email Status' (Subscribed), 'Our Take', 'Analyst Groups' (IOT Analysts, Top 25 Power 100), 'Private Data' (+ Add New), and 'Tiering'.

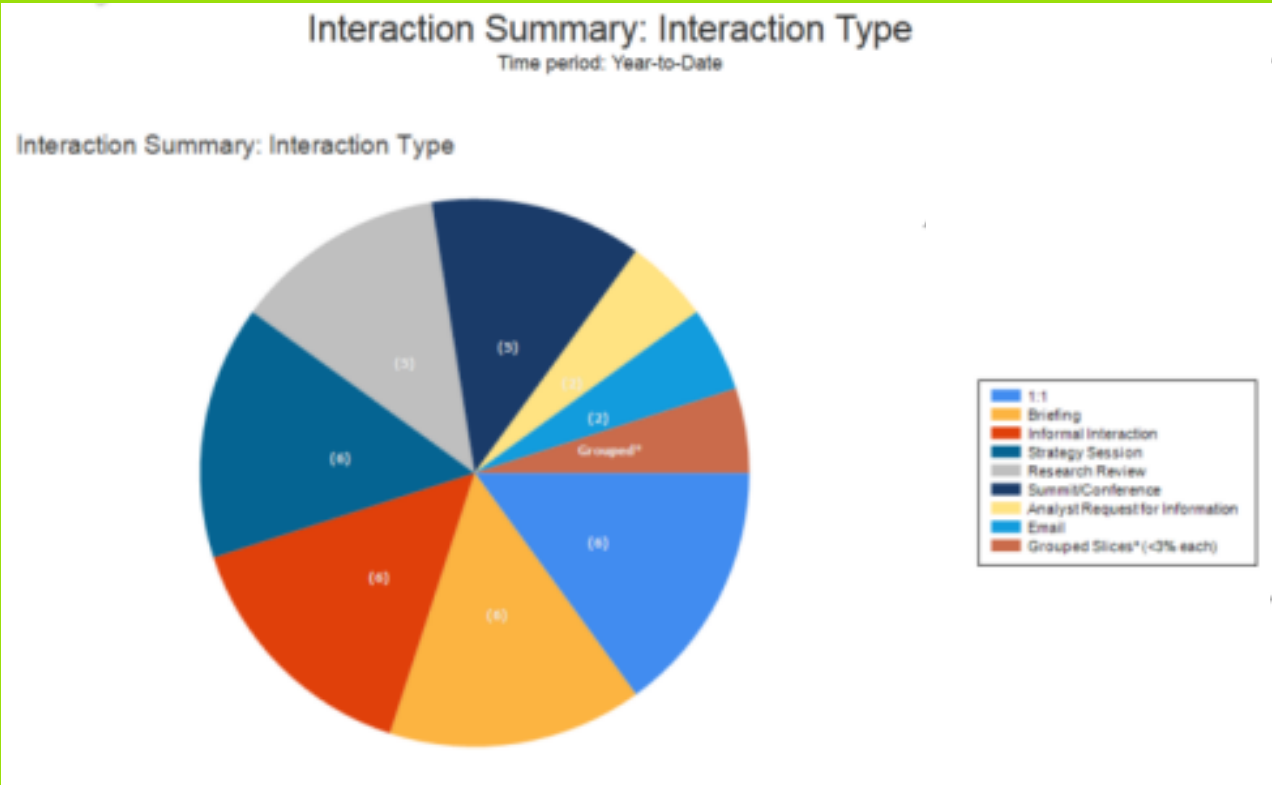
The form is titled 'Coverages' and has two buttons: '+New' and 'Pick'. Below the title is a text input field labeled 'Coverage Name'.



# Reports: Interaction Summary

Articles can be automatically captured, manually added or saved from Premium Content.

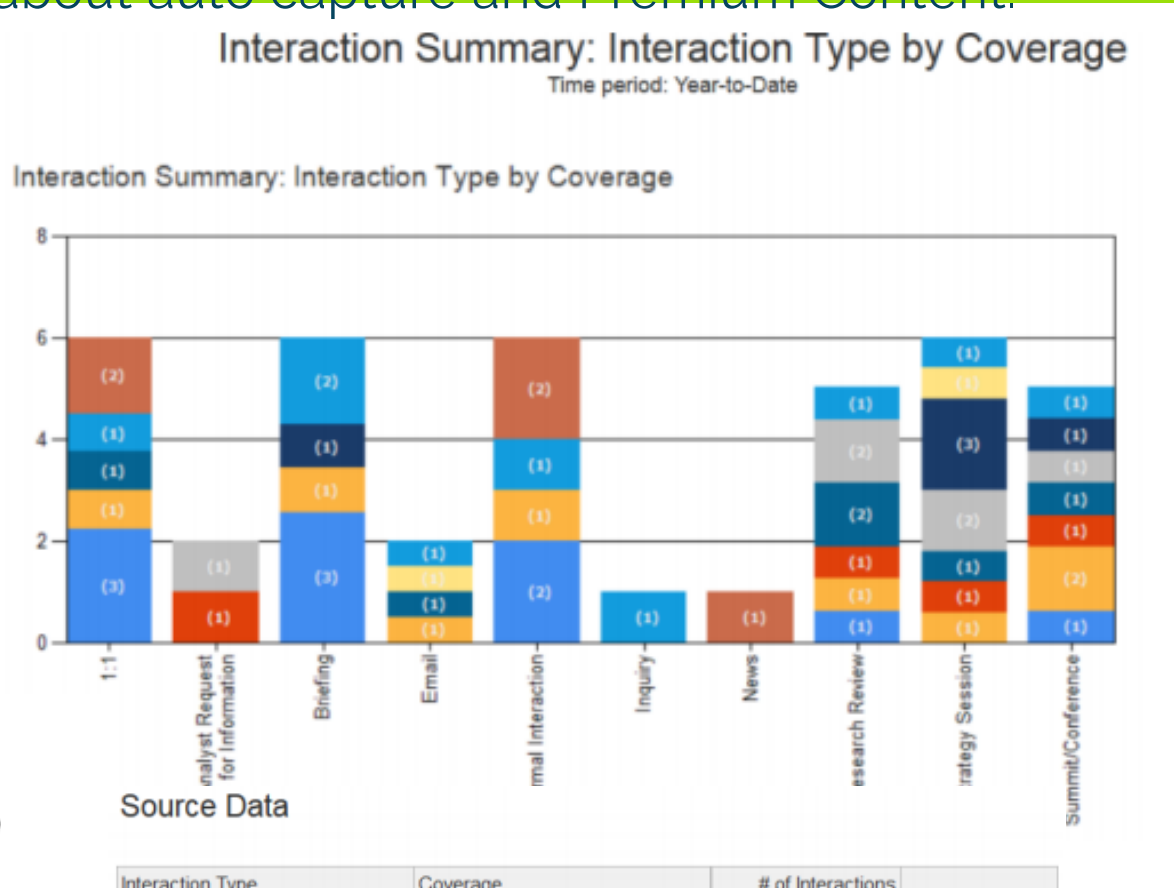
\*\*Please contact [edcapps@arinsights.com](mailto:edcapps@arinsights.com) or [cgolightly@arinsights.com](mailto:cgolightly@arinsights.com) for more information about auto capture and Premium Content.



Source Data

Interaction Type	# of Interactions	
1:1	6	15%
Briefing	6	15%
Informal Interaction	6	15%
Strategy Session	6	15%
Research Review	5	13%
Summit/Conference	5	13%
Analyst Request for Information	2	5%
Email	2	5%
Inquiry	1	3%
News	1	3%
Total	40	

This is an example of 1 grouping.  
Shows the breakout of "Interaction Types".



Source Data

Interaction Type	Coverage	# of Interactions	
Strategy Session	Business Analytics	3	30%
	Cloud Solutions	2	20%
	Application Delivery	1	10%
	Big Data	1	10%
	IOT & Industrial Data	1	10%
	IT Operations	1	10%
	Log Management	1	10%
	Strategy Session Total	10	
1:1	Security & Fraud	3	38%
	[Not specified]	2	25%
	Application Delivery	1	13%
	IOT & Industrial Data	1	13%
	Log Management	1	13%
	1:1 Total	8	
Research Review	Cloud Solutions	2	25%
	IOT & Industrial Data	2	25%
	Application Delivery	1	13%
	IT Operations	1	13%
	Log Management	1	13%
	Security & Fraud	1	13%
	Research Review Total	8	

This is an example of 2 groupings.  
Shows the breakout of "Interaction Types" and a breakout of coverages within the types.

# Analyst Premium Content

To set your Summary page, please contact [edcapps@arinsights.com](mailto:edcapps@arinsights.com) or [cgolightly@arinsights.com](mailto:cgolightly@arinsights.com).

Summary Page is set for each ARchitect site and will display the same summary for all users.

View total Tweets, Media Quotes, Blogs and Research. Click on the hyperlinked numbers to view the details.

**All Analysts** will display the top 5 analysts in each category (Research/ Quotes/ Twitter/ Blogs) across the entire Premium Content database.

Your Analyst Groups are displaying the Top 5 analysts from a predefined Analyst Group.

## Analyst Premium Content Summary

Past 7 Days

Example: hp or #hp or (hewlett packard)

Search Content

18

Saved: 0

64

Saved: 0

1

Saved: 0

29

Saved: 0

112

Saved: 0

DELL

86

Saved: 0

68

Saved: 0

6

Saved: 0

46

Saved: 0

206

Saved: 0

HP

141

Saved: 0

114

Saved: 0

2

Saved: 0

76

Saved: 0

333

Saved: 0

IBM

295

Saved: 0

314

Saved: 0

7

Saved: 0

91

Saved: 0

707

Saved: 0

MICROSOFT

37

Saved: 0

81

Saved: 0

1

Saved: 0

57

Saved: 0

176

Saved: 0

ORACLE

TOP RESEARCH PUBLISHERS

TOP ANALYSTS QUOTED IN MEDIA

All Analysts

Your Analyst Groups

Steve Clouthier  
ARC ADVISORY GROUP

12

Brian Hopkins  
FORRESTER RESEARCH, INC.

Andrew White  
GARTNER INC.

8

Mike Gualtieri  
FORRESTER RESEARCH, INC.

David Snow  
CURRENT ANALYSIS, INC.

8

Jennifer Daniell Belissent  
FORRESTER RESEARCH, INC.

Yefim Natis  
GARTNER INC.

6

Kate Leggett  
FORRESTER RESEARCH, INC.

Roy Schulte  
GARTNER INC.

6

Michele Goetz  
FORRESTER RESEARCH, INC.

All Analysts

Your Analyst Groups

2

Neil Mawston  
STRATEGY ANALYTICS, INC.

2

Jitesh Ubrani  
IDC

1

Jean Philippe Bouchard  
IDC

1

Jean Philippe Bouchard  
IDC

1

Jingwen Wang  
CANALYS

33

Nate Elliott  
FORRESTER RESEARCH, INC.

29

Frank Gillett  
FORRESTER RESEARCH, INC.

26

Fatemeh Khatibloo  
FORRESTER RESEARCH, INC.

26

Rusty Warner  
FORRESTER RESEARCH, INC.

24

David Johnson  
FORRESTER RESEARCH, INC.

TOP ANALYSTS ON TWITTER

TOP ANALYST BLOGS

All Analysts

Your Analyst Groups

R "Ray" Wang  
CONSTELLATION RESEARCH, INC.

531

Nigel Fenwick  
FORRESTER RESEARCH, INC.

Wes Miller  
DIRECTIONS ON MICROSOFT

503

Rick Holland  
FORRESTER RESEARCH, INC.

Richard Chirgwin  
MARKET CLARITY

424

Jeffrey Hammond  
FORRESTER RESEARCH, INC.

Bob Egan  
SERAPHIM GROUP

344

Ryan Barba  
FORRESTER RESEARCH, INC.

John Koetsier  
VENTUREBEAT

275

John Kindervag  
FORRESTER RESEARCH, INC.

All Analysts

Your Analyst Groups

108

Sarah Thomas  
LIGHT READING INC.

95

Henry Lancaster  
BUDDCOMM

74

Mari Silbey  
LIGHT READING INC.

48

Phil Fersht  
HPS RESEARCH

33

Alan Breznick  
HEAVY READING

12

No data for this time period.

7

5

5

5

# Analyst Premium Content: Filter and View

Add filters, change the time period to view the details of what analysts are saying.

You can view what filters are selected in the grey boxes.

The screenshot displays the top section of the Analyst Premium Content Database interface. It includes a header with a star icon and the text "Analyst Premium Content Database". Below the header is a navigation bar with several filters: "Add Filter(s)", "Past Month", "Twitter", "Blog", "Research", and "Quote". A search bar with the placeholder text "Begin typing for results" is also present. Below the navigation bar is a "Premium Content Summary" button. The main content area shows a list of tweets from various sources, including IDC, PARKS ASSOCIATES, and HOTTECH. Each tweet entry includes the user's name, profile picture, and a snippet of the tweet text. The interface is designed to allow users to filter and view analyst content.

Review the details in the grid.

Select and use the bulk updates.

This screenshot shows a detailed view of the Analyst Premium Content Database interface. The top section features a star icon and the text "Analyst Premium Content Database". Below this is a navigation bar with filters: "Add Filter(s)", "Past Month", "Twitter", "Blog", "Research", and "Quote". A search bar with the placeholder text "Begin typing for results" is also present. Below the navigation bar is a "Premium Content Summary" button. The main content area displays a grid of tweet details. The grid has columns for "Type", "Snapshot", and "Full Screen On". The first row shows a tweet from "Gabriele Roberti" (@groberti\_IDC) with a snapshot of the tweet text. The second row shows a tweet from "Mindi Sue Sternblitz-Rubenstein" (@MindiSue00) with a snapshot of the tweet text. The third row shows a tweet from "Dave Altavilla" (@HotHardware) with a snapshot of the tweet text. The interface is designed to allow users to review details in the grid and select and use bulk updates.