



YOUR GUIDE TO THE ANALYST PORTAL

Getting Started with the Analyst Portal



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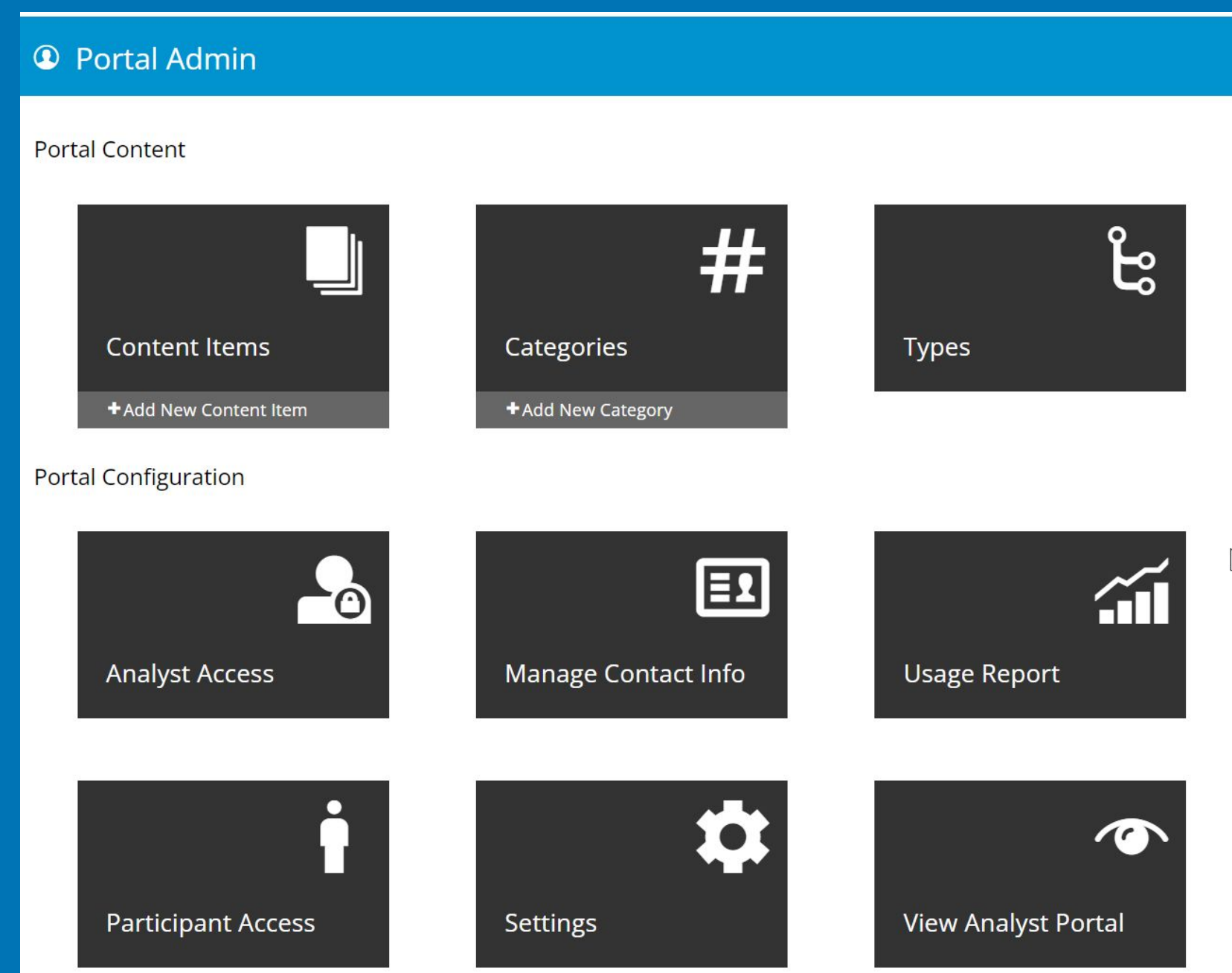
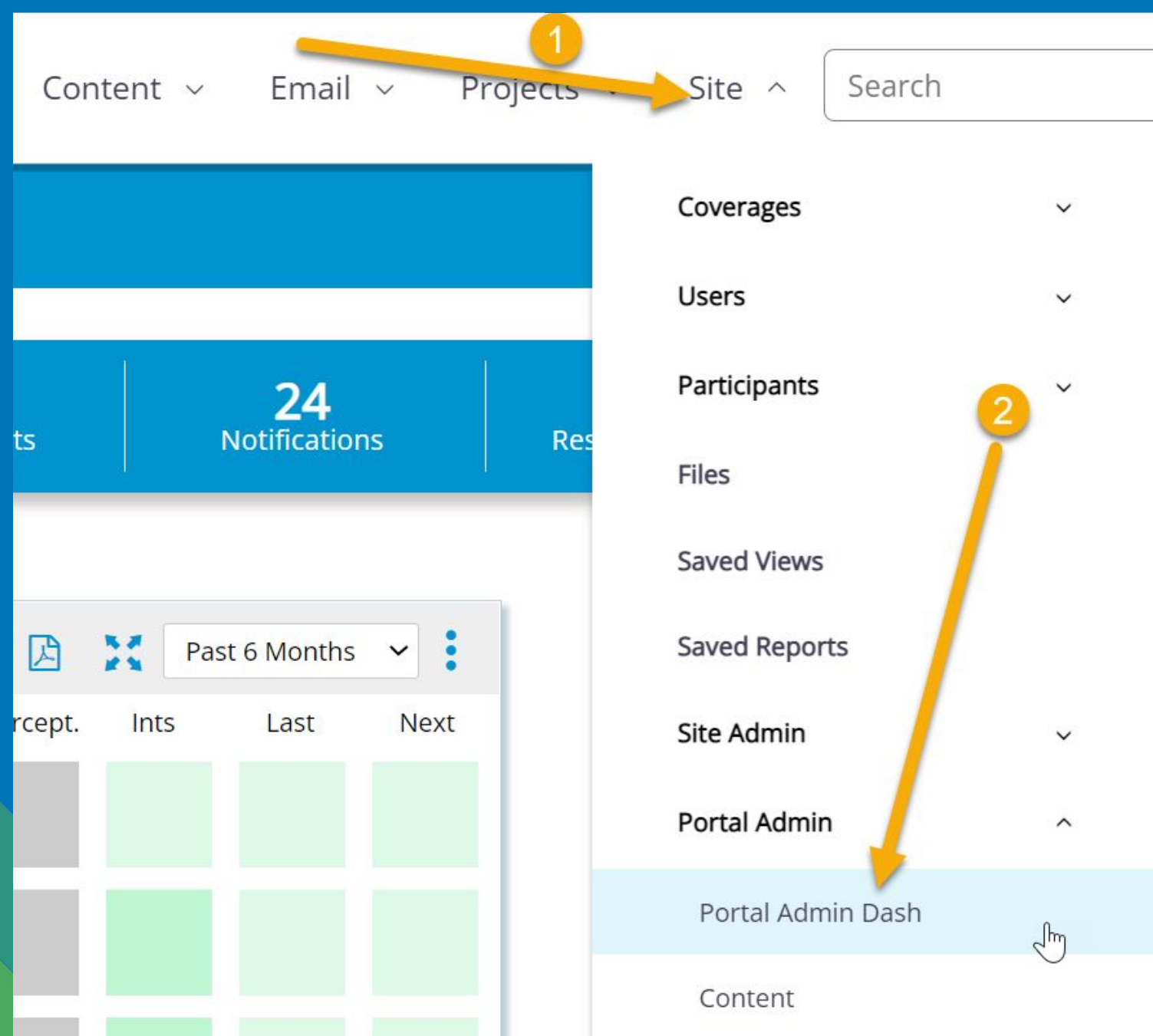
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Analyst Portal Administration

Once the Analyst Portal is activated in your ARchitect site, we will be able to manage and edit all the settings, content, and invitations through the Portal Admin Dash.

To get to the Portal Admin Dash, hover over “Site” in the menu and select “Portal Admin.”

The Portal Admin Dash looks like this:



Customizing Your Portal

1. Select **Settings** on the Portal Admin Dash.
2. In the **Banner Type** section, you can upload either a JPG image, PNG image or a hosted video.
Note: For video banners, they are played on a continuous loop with no audio.
3. Use the colors and layout options to get a branded look.
4. **Recommendations** — Click to enable your portal to appear as a "recommended portal" to analysts & influencers who have not been invited yet, so they can request access.

Cancel

Save

Url

Your Analyst Portal subdomain URL is: ari-portal.arinsights.com

Layout and Style

Banner Type: Image / Video

☐ No Banner

☐ Image (Banner image must be at least 960px wide)

☒ Hosted Video

00:13

WELCOME TO THE ARINSIGHTS ANALYST PORTAL

Select a Video

Footer

This will appear on the left side of the portal footer.

Colors

Main Color

Secondary Color

Menu Bar Color

Email Link Color

Layout

Featured Content Layout

☐ Display content image as thumbnail

☒ Display content image fullsize

☒ Display Date on Content Items

☒ Display Type on Content Items

Content Images

☒ Show Images on Content Items

Custom Style Sheet

Content Options

Featured Category

No Featured Category

Share Options

☒ Display Share Options

Content Alerts

☒ Enable Content Alerts

Recommendations

☒ Enable Portal Recommendation

4

Customizing Your Portal

1. In the **Log in Page Configuration** section, you can add a message to your login page.
2. You can upload a custom logo for your Analyst Portal. It must be at least 600px wide.
3. In the **Email Communications** section, you can edit the email copy for all updates to content and invitations that are sent to analysts and influencers.

The screenshot displays a web interface for configuring the login page and email communications. The top section, titled "Log in Page Configuration", contains two main areas: "Message" and "Logo". The "Message" area features a large text input field. The "Logo" area includes an information icon and a message stating "Logo image must be at least 600px wide.", a "Select File" button, and a file preview area with a close button. Below this, the "Email Communications" section is visible, starting with a sub-header "First Invitation & Create Account *". It contains a text input field with the placeholder "Access ARInsights Analyst Portal Now", followed by another information icon and message: "You must include %LinkToPortal%.". The bottom part of the screenshot shows the beginning of an email template, starting with "Hi %Nickname%," and a paragraph of introductory text about the ARInsights, LLC Analyst Portal.

Managing Contact Info

This section allows you to include contact information for your Portal and assign a user to receive Portal requests.

1. Select **Manage Contact Info** on the Portal Admin Dash,
2. From here, you can manage who on your team will receive email communications, such as Portal Access Requests from analysts and influencers.

Manage Contact Info

[Portal Admin](#) - Manage Contact Info

[Cancel](#) [Save](#)

Users Who Receive Generic Contacts

Select User

Select User Group

Crystal Golightly

Analysts Who Can See Contact Information and Form

☒ Visible to Entire Portal

☐ Only Visible to the following Analysts

Displayed Contact Information

Email

Phone

Address

Managing Content Types

This section allows you to distinguish between content types. This can be used as a filter on the Analyst Portal.

- 1. Select **Types** on the Portal Admin Dash.
- 2. From here, you can manage and add new types of content. Common examples of content types include Links, Documents, Presentations, and Webinars. The Types you include will be used as labels for the content articles.

Manage Content Types

[Portal Admin](#) - Manage Content Types

Types

Blogs	Edit	Delete
Documents	Edit	Delete
Link	Edit	Delete
Presentations	Edit	Delete
Press Releases	Edit	Delete
Videos	Edit	Delete
Webinars	Edit	Delete

Add New Type

Type Name *

25 character limit

Enter New Type Name

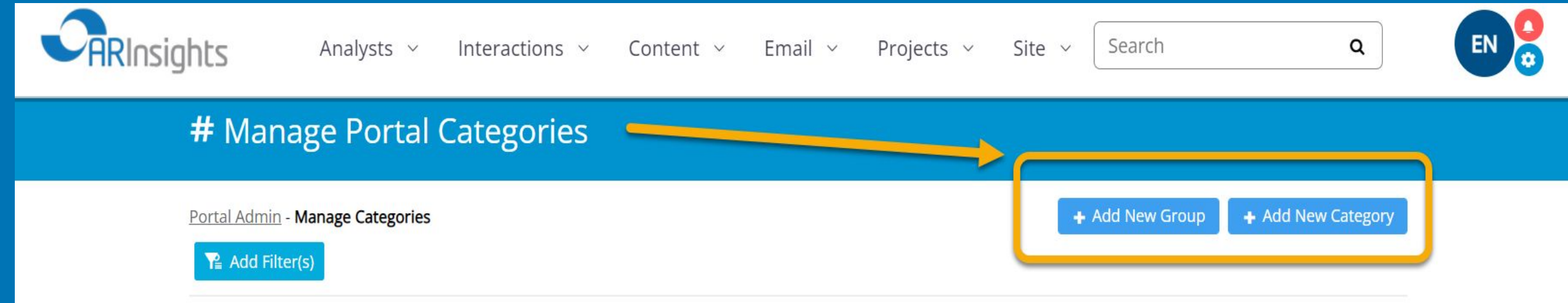
Add

Creating Category Groups & Categories

1. Select **Categories** on the Portal Admin Dash.
2. Click on “**Add New Group**” to add a category group.
3. Type the category group name and hit save.
4. Next, click “**Add New Category**” to add a category.
5. Type a category name, select the category group that it falls into, and select an internal contact for any questions or inquiries within the category.

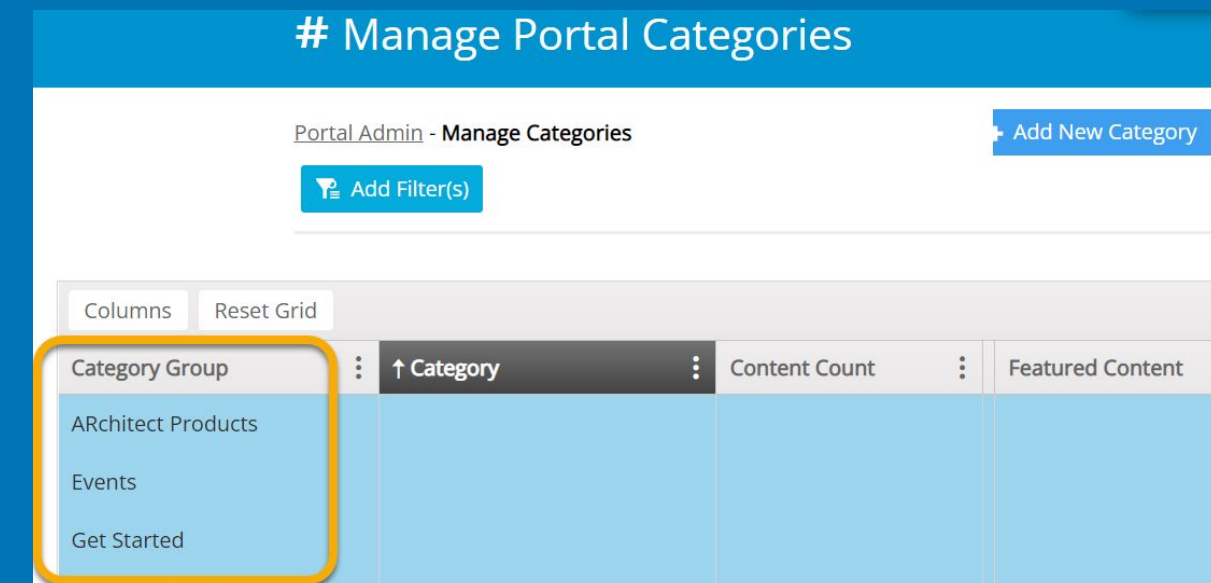
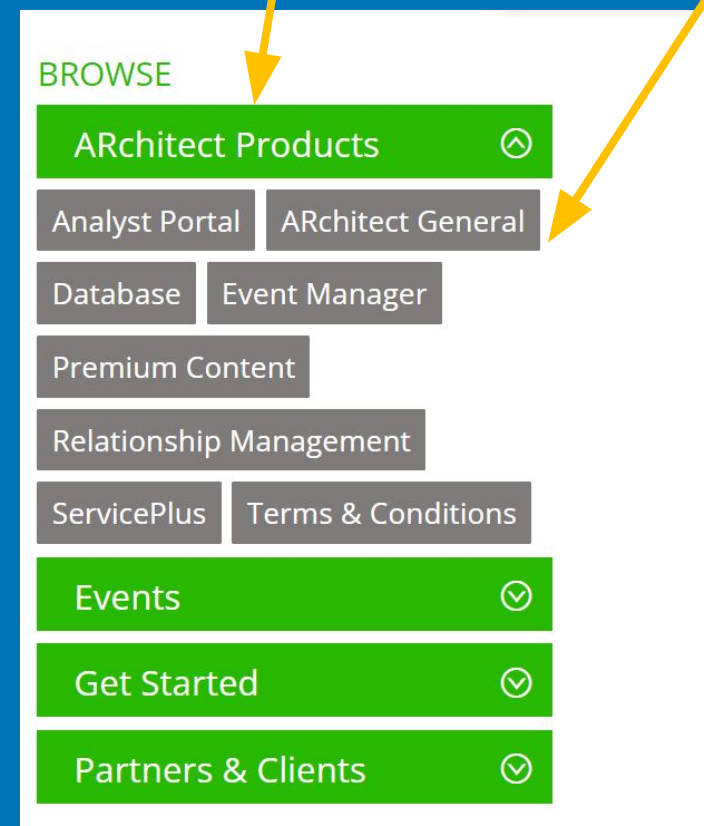
Category Groups and Categories you create correspond to your Portal page Category buttons.

An example of a Category Group would be “Products” with your products listed as Categories.



Your category groups

Your categories



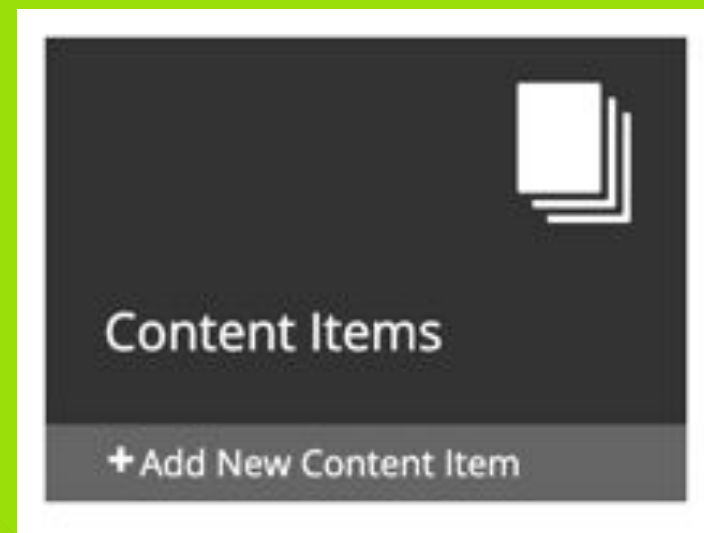
Adding Content

There are two ways to add new content pieces:

1. The first is the **+Add New Content Item** button on the Portal Admin Dash.
2. The second is by selecting Content on the Portal Admin Dash.
 - Click **Add New Content** in the top right-hand corner.

While on the Content page on the Portal Admin Dash, you can also:

- See details about content pieces, such as view counts, expiration dates and more.
- Export data for further reporting.
- Publish content, update content to “What’s New” or “Featured” and expire content via the bulk updates.



Manage Portal Content

Portal Admin - Manage Content

[Add Filter\(s\)](#) [Past 2 years](#)

Export Columns Reset Grid

<input type="checkbox"/>	Title	Categories	↓ Views	Publish Date	P...	Attachments		
<input type="checkbox"/>	What's the ARchitect Analyst Power 100 and how can I get on it?	Portal Help, The Analyst Power 100	284 Details	1/13/2021	Yes	2	Email	Edit
<input type="checkbox"/>	Welcome to the Portal - Let's Get Started!	Portal Help	85 Details	1/13/2021	Yes	2	Email	Edit
<input type="checkbox"/>	Intro to ARInsights	About ARInsights, Portal Help	69 Details	1/13/2021	Yes	0	Email	Edit
<input type="checkbox"/>	REVEALED: Most Improved Analysts of June	The Analyst Power 100	35 Details	7/2/2021	Expired	2		
<input type="checkbox"/>	Analysts Rising Through the Power 100 Rankings for June	The Analyst Power 100	34 Details	7/1/2022	Yes	2		

1 - 25 of 58 items

Apply a bulk update
Publish Content
Update Featured
Expire Content
Update What's New
Apply a bulk update

Content Field Key

When uploading or adding new content, add a **title, summary and content** text to the required sections.

Search terms: Search terms are words you can choose to help analysts search for this content piece within the Portal.

Public link: This is a link you can post to the content to direct the analyst to the resource.

Content image: This image will show at the top of the content piece and can be included on your homepage view.

In **Content attachments**, select the Add New Attachment button and upload or insert links, files, images, embedded videos or hosted videos.

Cancel

Save

Content Basics

Title *

Displayed Summary *

0 of 500

B

I

Enter a summary here to display on the homepage. The goal of this brief text is to have the analysts wanting to read more and click into the full article.
Example: *Neil Armstrong became the first man to step foot on the moon. As he touched the ground he famously declared: "That's one small step for man, one giant leap for mankind."*

Full Text *

B

I

U

abc

x₂

x²

Format

(inherited font)

(inherited size)

A

Content Details

Search Terms

Public Link

Public Link Display Text

Content Image

Select File

Category and Type

Select Categories

Select Content Type

AR Contact

Same contact(s) as category

Analyst Visibility

☒ Visible to Entire Portal

☐ Only Visible to the following Analysts

Content Availability

Publish Date

Pacific Standard Time

Expire Date

☐ Publish

☐ Show as "What's New"

☐ Featured

Content Attachments

Add New Attachment

In **Category and Type**, you can select what category the content piece falls into and what type of content it is.

In **AR Contact**, you can select a specific contact from your team to be contacted from this page.

In **Analyst Visibility**, you can select specific analysts or analyst groups who have access to view the content pieces.

In **Content Availability**, you can select the publish date and time and expiration date. Here, you can also check the “What's New” or “Featured” checkbox. Featured content is displayed at the top of the homepage in a list view including the image. What's New content is displayed at the bottom of the homepage in a list view.

Launching the Portal & Inviting Analysts

Once you have customized your Portal and added content pieces, you can now invite analysts to view your Portal.

1. To invite an analyst, select **Analyst Access** from the Portal Admin Dash.
2. From the filters, you can filter by analyst, analyst group, firm or invited.
3. Once you've selected your filters and chosen which analysts you want to invite, you can individually click the **Invite** button next to their name.
4. If adding more than one analyst, you can filter for the analysts you want to invite, click **Apply Bulk Update** at the bottom right-hand corner, and click **Send Invite** from the dropdown.
5. Analysts can also request access to your Portal from their logins. The Portal contact will receive an email with the analyst access request.

Manage Analyst Access

Portal Admin - Manage Analyst Access

[Add Filter\(s\)](#) [Search](#)

Analysts: Eric Gmail [Clear Filters](#)

[Export](#) [Columns](#) [Reset Grid](#)

<input type="checkbox"/>	Analyst	Relationship M...	Invited	Last Viewed	Requested Acce...	Alert Frequency	Invite	Access	Usage	Categories
<input type="checkbox"/>	Eric Gmail					Weekly	Invite			Manage

[1](#) [25](#) items per page 1 - 1 of 1 items [Apply a bulk update](#)

Inviting Other Participants

This setting allows you to invite internal contacts at your organization who are not ARchitect users (such as executives or internal stakeholders) to view the Analyst Portal.

1. Select Participant Access on the Portal Admin Dash.
2. Use the search box to find internal Participants. Click Send Invite to invite them.

Manage Participant Access

Portal Admin - Manage Participant Access

[Add Filter\(s\)](#) [Search](#)

Participant: ×

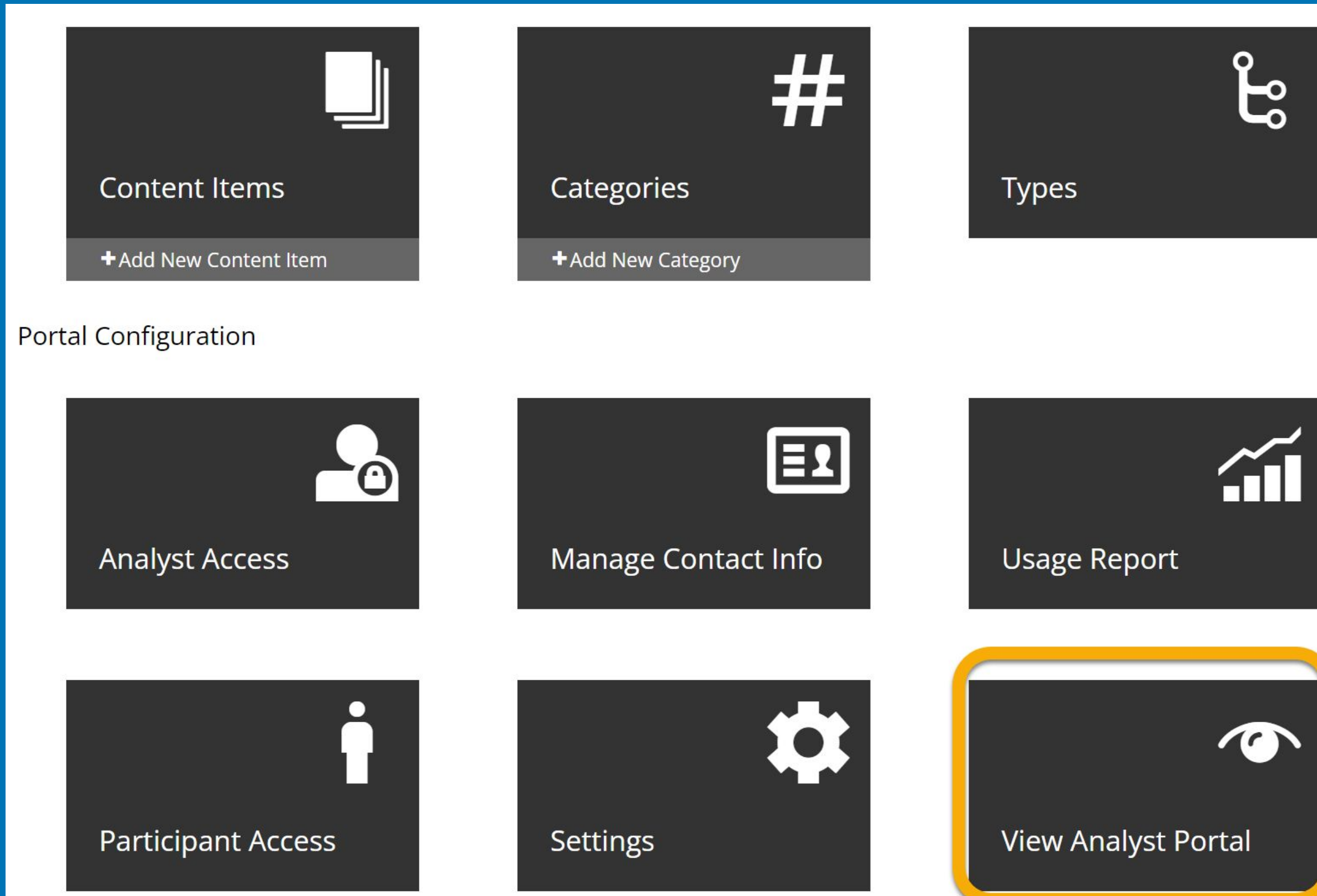
First Name	Last Name	Email	Invited
eric	test		Send Invite

25 items per page

View Analyst Portal

This page allows your organization's ARchitect users to view your Portal with a simple click.

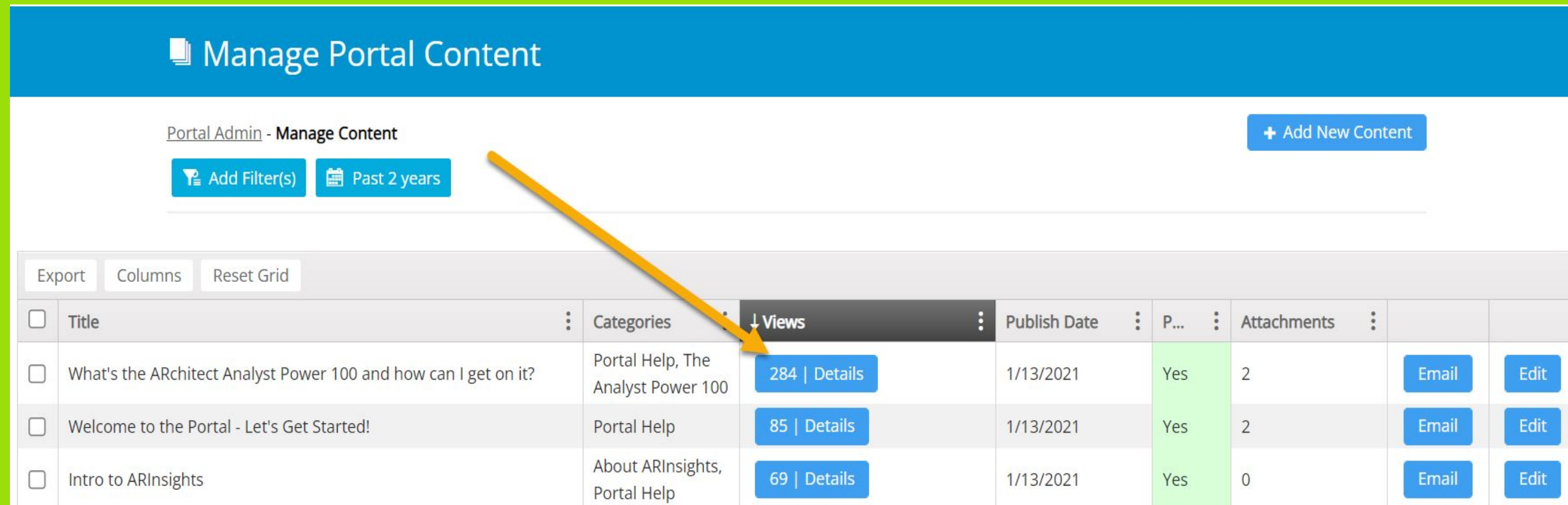
1. Select **View Analyst Portal** on the Portal Admin Dash.



Monitoring Analyst Views & Clicks on the Portal

Views on Individual Content Pieces

1. Select **Content** on the Portal Admin Dash.
2. In the content list view, you can see content views highlighted in blue in the column titled "Views."
3. Click onto this button to see view details of individual content pieces.

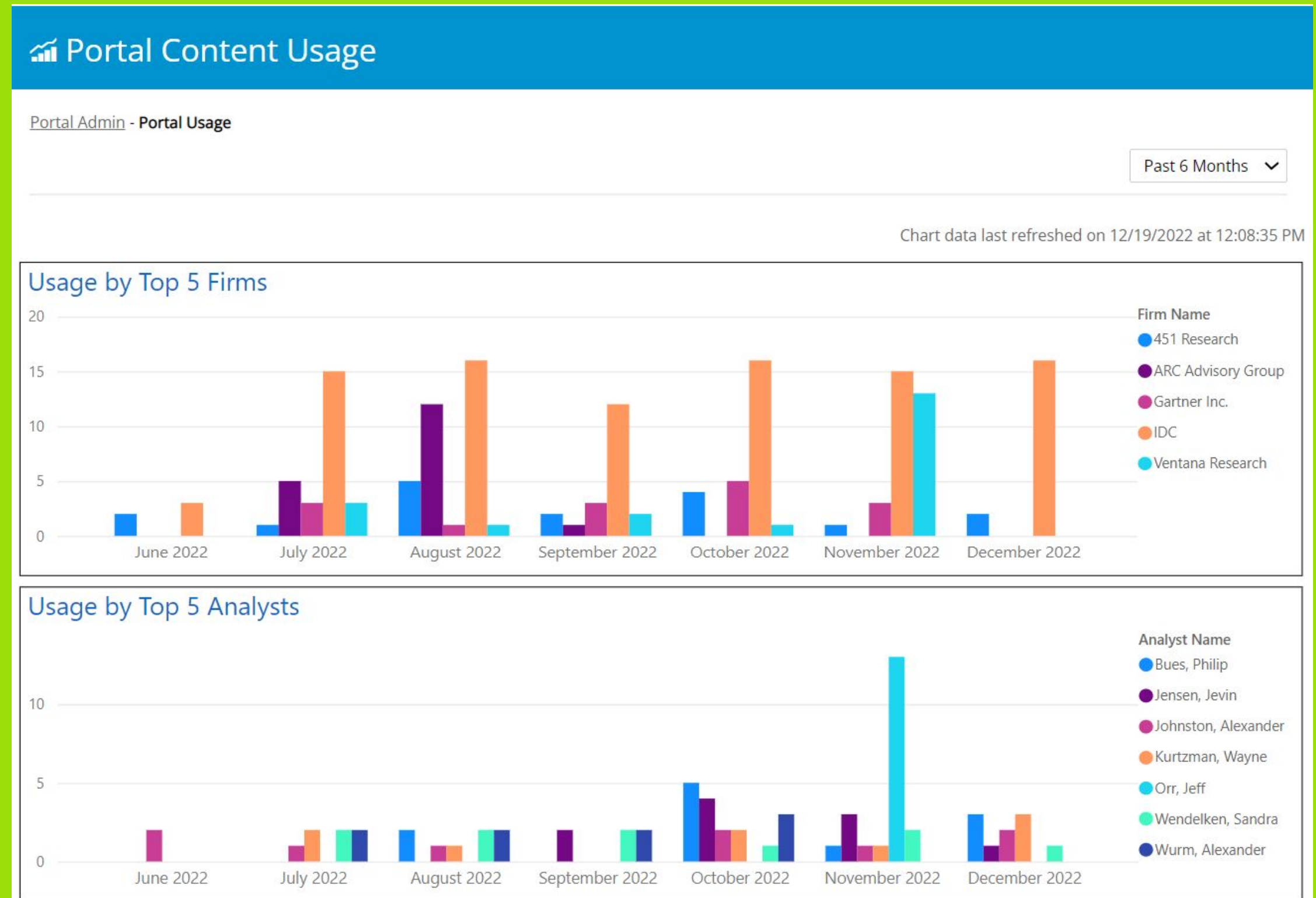


Manage Portal Content									
Portal Admin - Manage Content									
Add Filter(s) Past 2 years + Add New Content									
Export Columns Reset Grid									
<input type="checkbox"/>	Title	Categories	Views	Publish Date	P...	Attachments			
<input type="checkbox"/>	What's the ARchitect Analyst Power 100 and how can I get on it?	Portal Help, The Analyst Power 100	284 Details	1/13/2021	Yes	2	Email	Edit	
<input type="checkbox"/>	Welcome to the Portal - Let's Get Started!	Portal Help	85 Details	1/13/2021	Yes	2	Email	Edit	
<input type="checkbox"/>	Intro to ARInsights	About ARInsights, Portal Help	69 Details	1/13/2021	Yes	0	Email	Edit	

Monitoring Analyst Views & Clicks on the Portal

Views on All Content Pieces

1. Select **Usage** on the Portal Admin Dash.
2. You can view charts on Usage by Top 5 Firms, Usage by Top 5 Analysts, Usage Trend by Month, and Usage by Category.
3. At the bottom is a list of Portal usage details.



Support

Where can I get help?

Find answers to questions in the [Knowledge Base — Analyst Portal](#)

Our support email is support@arinsights.com

Our support number is **1 720.231.2950**