Table of contents

- Portal overview
  - Logging in
  - Homepage
  - Category landing page
  - Report landing page

- Finding reports

- Viewing reports

- Using search

- User profile

- Creating reports with “clippings” feature

- Other features
  - Preferences
  - Ask the analyst
Portal overview

Content flow

How to login or register → Homepage highlights → Category landing page → Report landing page
How do I know if I am logged in?
If the word “Guest” appears in these locations, you are NOT logged in.

Click the LOGIN/REGISTER button to login or register.
Logging in (www2.everestgrp.com)
How to log in, page 2 of 2

Choose either the LOGIN or REGISTER tab

A
Choose LOGIN if:
• You have previously used the reports portal and have a username; or
• You have a username, but no password

B
Choose REGISTER if:
• If you are new to the portal
• If you are new to the portal and have an access code, please enter it as part of registration

Login

REGISTER FOR ACCESS

First Name
Last Name
Email
Note: Provide company email.
Phone
Job Title
Company
Country
Please select a country
Language
English
Password
Confirm Password
Select Account
Guest (Current account)
I have an access code

Register
Homepage highlights

- Start new Search from any page
- Recently viewed report(s)
- Specific user info
- Access all reports in your subscription (links to PRODUCTS in top nav)
- Search with keyword or click Advanced Search for more options
- Accordion navigation to find reports in specific categories or by specific authors
- All new products for past 60 days
- Choose email preferences
If you select a particular category or sub-category from the Homepage left-hand accordion navigation, you will link to a category landing page. Additional recommended products based on the category you are in.

Report listing for the chosen category can be arranged by various selections, and can show all products or only your products; the defaults are Licensed/Date sort order and All Products.
Report landing page (Subscriber view)

Search within report
View thumbnails of all slides
Report summary information
Download PDF of report
Table of contents

- Portal overview
  - Logging in
  - Homepage
  - Category landing page
  - Report landing page

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- Viewing reports

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- Creating reports with “clippings” feature

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Finding reports: using homepage accordion navigation

1a. Choose report category from left navigation on homepage

1b. Choose report from category landing page
Finding reports: using MY REPORTS button on homepage

2a Click on MY REPORTS button on homepage image to access reports in your subscription

2b Choose report from matching products list
Finding reports: using Search

3. Click on one of two Search options:

3a. Search with keyword or from Popular Searches

3b. Search with keyword from top right nav from any page on site

3c. Choose report from search results
Table of contents

- Portal overview
  - Logging in
  - Homepage
  - Category landing page
  - Report landing page

- Finding reports

- Viewing reports

- Using search

- User profile

- Creating reports with “clippings” feature

- Other features
  - Preferences
  - Ask the analyst
Viewing reports

Search within report to find specific keywords

Different report viewing modes

Page through report

Download PDF of full report

Click on thumbnail of page to view full page from within browser
Table of contents

● Portal overview
  – Logging in
  – Homepage
  – Category landing page
  – Report landing page

● Finding reports

● Viewing reports

● Using search

● User profile

● Creating reports with “clippings” feature

● Other features
  – Preferences
  – Ask the analyst
Using search
Overview

**Quick Search**
Left rail on homepage
- Search with keyword(s) or from Popular Searches from the main homepage

**Popular Searches**
Below Quick Search on homepage
- Choose among popular search terms

**Traditional Search box**
Top right of all portal pages
- Search with keyword(s) from top right nav bar on any page on site
After searching, using either of the two search options, you will see a search results landing page.

Filters allow you to narrow search results to a focused set of products.

Search results default to Relevance and All Products.

Search parameters can be saved and added to your profile.

Green icon: you have access. Red padlock: you do not have access.

Additional recommended products based on Search keyword(s).
Using Search: filtering

Filter search by eight criteria to focus results.

1. RESEARCH AREA
2. DOCUMENT TYPE
3. ANALYST
4. GEOGRAPHY
5. INDUSTRY
6. PUBLISHED DATE
7. CONTENT TYPE
8. STATUS

Matching Products

Arrange by: Relevance

Save this Search

Advanced Search

automation
1 Click Save this Search to save search criteria
2 Manage the saved search

- Name the saved search
- If desired, check box to pin saved search to homepage
- Check box if you want to receive email updates when a new report matching saved search criteria is published
Table of contents

- Portal overview
  - Logging in
  - Homepage
  - Category landing page
  - Report landing page

- Finding reports

- Viewing reports

- Using search

- User profile

- Creating reports with “clippings” feature

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  - Preferences
  - Ask the analyst
User profile, page 1 of 2

Profile tab
- Includes information you provided during registration
- You can change fields in profile at any time
- You can upload your photo for a more personalized experience

Saved Searches tab
- Includes any Search parameters you have saved
- No limit to the number of saved searches
- Saved searches can be pinned to the Homepage
Clippings tab

- Area for you to save pages from a specific report or from several reports
- Allows you to create and save your own report
- You can download your Clippings
Table of contents

- Portal overview
  - Logging in
  - Homepage
  - Category landing page
  - Report landing page

- Finding reports

- Viewing reports

- Using search

- User profile

- Creating reports with “clippings” feature

- Other features
  - Preferences
  - Ask the analyst
1. From report landing page, choose page to add to Clippings

- Hover mouse over selected report page;
- Click on Add page to clippings;
- You may save as many pages as you want within one report or across reports.
Clippings feature, page 2 of 2

2 Go to User Profile > Clippings

3 Save and/or download clipping(s) to create your own report

- Save Selection
- Download to Word
- Download to PDF
- Download to Excel
- Download to PowerPoint
Table of contents

- Portal overview
  - Logging in
  - Homepage
  - Category landing page
  - Report landing page

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- Viewing reports

- Using search

- User profile

- Creating reports with “clippings” feature

- Other features
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- Preferences tab on Homepage will include your email preferences if you have previously selected them

- You will be able to choose and/or update your preferences in this tab
Ask the analyst

Click Ask now button to ask a question about the current report.

ASK THE ANALYST dialog box will open.

Enter your question about the current report.

Click Send to submit your question.

Your question will be forwarded to the report-specific analyst(s).
Table of contents

● Portal overview
  – Logging in
  – Homepage
  – Category landing page
  – Report landing page

● Finding reports

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Please contact your client director if you have questions about the Everest Group reports portal; experience issues accessing reports; or would like to schedule an analyst inquiry.

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