



AI Insight Comparative Reporting Tool December 2020 Update

User Instructions and Key Changes

Summary

AI Insight's Comparative Reporting Tool Enhancements effective Dec. 19, 2020 include:

- Improved navigation for applying filters, selecting programs and choosing criteria.
- An advanced filter that allows you to input a set of criteria to populate programs that apply.
- Updated Results page offers ability to easily review data (ie: sort/expand columns, keyword search, etc.)

Key Changes – Interface/Navigation

- To locate:
 - **Broker Dealers, RIAs, Financial Advisors:** Click the **Reports & Logs** button
 - **Sponsors:** Click the **Programs** button and view under **Premium Reports**
- Under **Compare Programs**, choose **Create New Report** to build a new report with new criteria.
- Under **Compare Programs**, choose **Standard Reports** or **Saved Reports** to work with a report saved previously or a standard report available by sector/structure.
- Use the Streamlined Review menu at the top to navigate back and forth through the process.
- When selecting filters from a drop-down menu, you will need to click the box again to retract the drop-down menu.

Key Changes – Applying and Selecting Programs

- Under **General**, create a filter by entering a keyword *or* use the drop-down menus to choose criteria.
- **Important:** As each selection is made, the list of available programs in the right column will continue to update. This will prompt a timing wheel to appear while the list is updating.
- **Example:** If you select Private Equity/Debt under Sector, the other selection menus will update to eliminate criteria that does not apply to this sector. In this example, Capital Preservation and all of the AMF options would no longer appear under Return Objective since it does not apply to Private Equity/Debt.
- Under **Advanced**, input specific criteria about fees, distributions, investment strategies, etc. to populate a specific set of programs that apply.
- When you are finished selecting your criteria, the applicable offerings will be listed on the right side. At that point, you may unselect funds you do not want to compare.



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Key Changes – Select Criteria

- The **Saved Criteria** drop-down at the top right of the window allows you to automatically populate a set of criteria you have selected and saved previously.
- **To choose a new set of criteria**, make selections from one or more of the drop-down menus in the three columns.
 - **To save the criteria for future use**, click the “Save and View Results” button, then choose “Only Criteria”.
 - **To save the criteria and report for future use**, click the “Save and View Results” button, then choose “Criteria and Report”.
 - **If you do not want to save**, choose “View Results”.

Key Changes – Results

- The **Results** table is adjustable to suit how you want to view the data:
 - Hover over any part of a row of data to highlight it.
 - Click on the title of a column to sort all data by that column.
 - Hover over a line in the title row of the table, then drag the column to resize.
 - Click on a column, then hold and drag to re-sort in the table.
 - Click on a fund name and the Program Summary will appear in a pop-up window.
- **Important:** If you need to modify the programs and or the criteria selected, you will need to go back to the Select Programs and/or the Select Criteria report to make these changes and re-run the results.

Other Changes

- **Under Programs & Sponsors > Alternative Investment Programs**, a new “Add to Compare” checkbox column has been added.
- **Select up to 10 programs**, then click **Compare** to view the **Results** page of the Comparative Reporting tool.

Questions? Contact AI Insight Customer Care at 877-794-9448 ext. 710 or customercare@aiinsight.com.

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