

Intelligence2day®

Administration Manual

Contents

1	Introduction	3
2	Topics	4
	2.1 Add a sub topic	4
	2.1 Classification: Define topic rules	5
	2.1.1 Add rules that includes keywords	6
	2.1.2 Add rules that excludes keywords	9
3	External Content	10
4	Publish internal information	11
	4.1 Write article	11
	4.2 Add Topics/Publish	12
	4.3 Comment an article	12
5	My Favorites.....	13
6	My Library	14
7	Create Reports.....	16
	7.1 Create new Report	17
	7.2 Add to Report	18
8	Contact Support	19

1 Introduction

Intelligence2day® Professional is an award-winning information access platform that provides a single point of access to information from multiple sources. It is a search-based software application designed to make knowledge workers more productive.

About this Documentation

This manual provides guidance to the usage of the various functions of Intelligence2day® Professional. The described functions as well as the screen shot examples shown in this documentation are based on a standard installation. Treat any displayed data in the examples purely for illustration purposes.

Copyright Notice

Copyright © 2016 Comintelli AB. All rights reserved.

Copying of the contents, may not be done without permission. We assume no liability or responsibility for any errors or omissions in the content of this document. We reserve the right to alter functionality and technical system requirements. Intelligence2day® is a registered trademark of Comintelli AB.


2 Topics

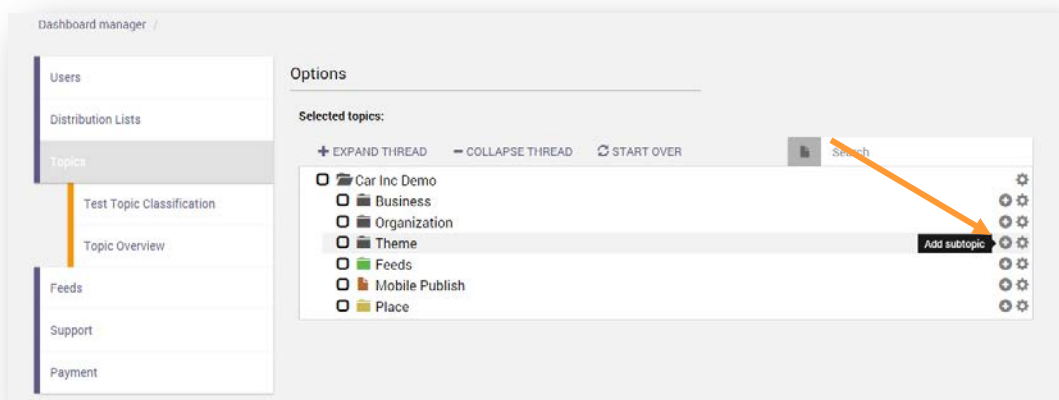
All information is classified and structured into Topics according to pre-defined topic rules. Intelligence2day® Professional is provided with a standardized topic structure consisting of five topics presented as tabs on the dashboard:


- **Business** - Your business areas, typically products and/or service areas.
- **Organization** - Companies and/or organizations
- **Place** - Different locations, e.g. countries or cities
- **Theme** - Key Intelligence subjects or special themes
- **Feeds** - For External content
- **Mobile** - For publishing via mobile device

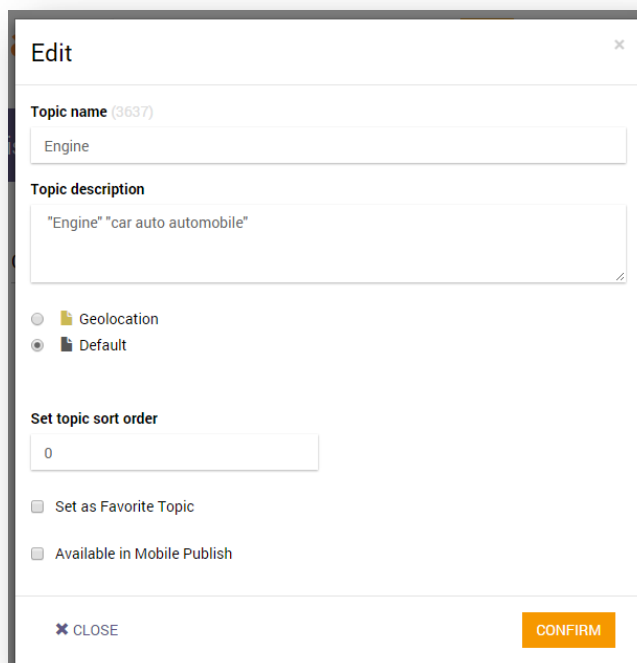
It is possible to add up to two levels of (unlimited) subtopics under each.

2.1 Add a sub topic

Got to: **Admin - Topics**. All available topics are presented. 1. Click on the  symbol next to the topic you want to add a sub topic to (e.g. Theme) and type a name.



The sub topic is added and listed in alphabetical order. Sub topics can be edited/renamed with help of the wrench icon: 



Topic name: Edit name

Topic description: Describe the topic (optional)

Default or Geolocation: Choose Geolocation only in case the topic is a place, region or country etc. for visualization on the Analytics view of your content


Set topic order: Use ASCII numbers to change order

Set as Favorite topic: Show as facet on the search results page

Available in Mobile Publish: Topic shows when on mobile publishing

2.1 Classification: Define topic rules

Each topic has a set of associated rules which are used for the automatic classification of articles. **The topic name is by default the first rule.**

Define topic rules by clicking the cog icon  and the topic management interface shows. Add rules that should be included/excluded from the classification. This is a powerful tool that can be used to write advanced topic rules.

If the required keywords for a topic are included in an article, the article will automatically be classified into this topic.

It is possible to add any number of rules. Two input fields are displayed by default, but additional fields will automatically be added by pressing <Enter> when the second field has been filled in.

2.1.1 Add rules that includes keywords

Create rules by entering keywords into the input fields. The Boolean operators Phrase, AND, OR and RegEx can be used to create these rules. Use the drop down menu under "Options" to define which operator should be used between the keywords in each row.

It is possible to combine input fields with the operator OR | AND to expand or narrow down the rules. Use the drop down menu (<OR>/<AND<) between the fields for this.

<OR>

Combine input fields with the operator <OR> to expand the rules.

The screenshot shows the 'Edit' dialog box with the following structure:

Add rule(s) that includes keywords				
Rule no.	Keywords	Options	Exact match	Delete
1:	Volvo	"Phrase"	<input type="checkbox"/>	<input type="checkbox"/>
<OR>				
2:	VOLV-B	"Phrase"	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Below this section is an 'ADD' button. The next section is 'Add rule(s) that excludes keywords', which is currently empty. At the bottom of the dialog are 'CLOSE' and 'CONFIRM' buttons.

- Articles containing the keyword "Volvo" will be classified into this topic.

<OR>

- Articles containing the word "VOLV-B" (Volvo's Stock Ticker) in capitalized letters will also be classified into this topic.

All keywords are treated as case-insensitive. Select the "Exact match" option to make it case-sensitive. In this example "volv-b" will not get a hit since "Exact match" is checked.

<AND>

Combine input fields with the operator <AND> to narrow down the rules.

The screenshot shows a window titled "Edit" with two sections: "Add rule(s) that includes keywords" and "Add rule(s) that excludes keywords".

Add rule(s) that includes keywords

Rule no.	Keywords	Options	Exact match	Delete
1:	Volvo	"Phrase"	<input checked="" type="checkbox"/>	
	<AND>			
2:	V[0-9]	RegEx	<input type="checkbox"/>	
	<AND>			
3:	Cross Country	"Phrase"	<input type="checkbox"/>	

ADD

Add rule(s) that excludes keywords

Rule no.	Keywords	Options	Exact match	Delete
1:		"Phrase"	<input type="checkbox"/>	
	<OR>			
2:		"Phrase"	<input type="checkbox"/>	

ADD

✕ CLOSE CONFIRM

Articles containing a combination of the words "Volvo" <AND> V[0-9] <AND> "Cross Country" will be classified into the topic. "Cross Country" is a "Phrase" in this example, since we want the two words to follow each other. In case we would like the two words to be written separately, but still mentioned in the same article we could have chosen <AND> in the "Options" dropdown.

RegEx

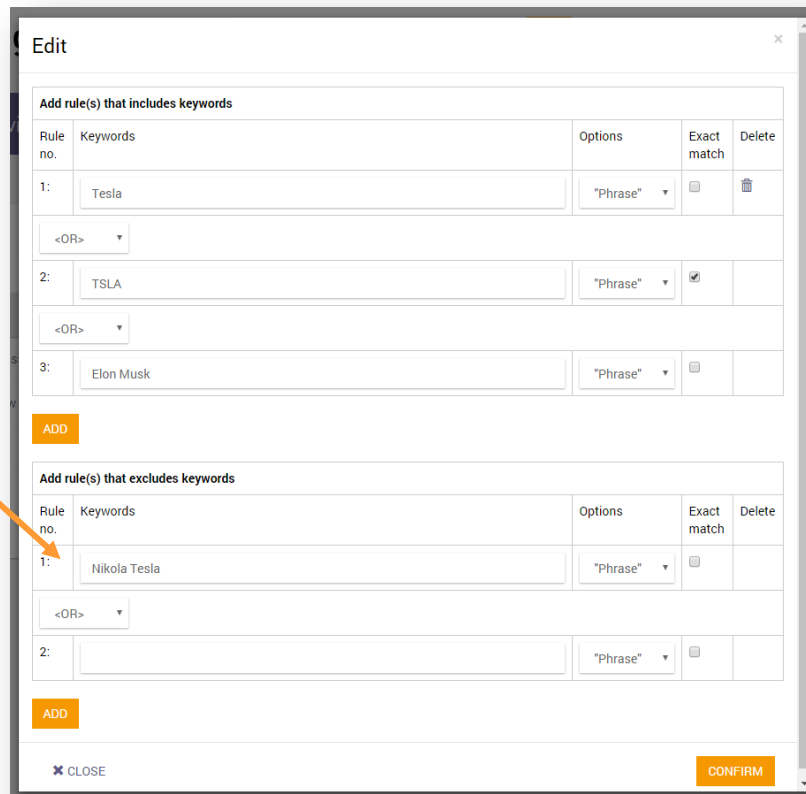
[0-9] is a Regular Expression used for identifying strings of text of interest, such as particular digits or characters, words, or patterns of characters. In this example V[0-9] specifies a range which matches any digit from 0-9 after the letter V to match all Cross Country models from the Volvo V-series (e.g. V40, V60, V90).

More RegEx examples:

- [A-Za-z0-9] = Alphanumeric characters
- [A-Za-z0-9_] = Alphanumeric characters plus "_"
- [^\w] = non-word character
- [A-Za-z] = Alphabetic characters
- [0-9] = Digits
- [a-z] = Lowercase letters
- [A-Z] = Uppercase letters
- [A-Fa-f0-9] = Hexadecimal digits

2.1.2 Add rules that excludes keywords

If the excluded keywords for a topic are included in an article, the article will automatically be excluded from this topic. E.g. Nikola Tesla is irrelevant for the topic "Tesla"; therefore we excluded the phrase "Nikola Tesla" from this topic, to only get relevant information into the system.



The screenshot shows a web interface titled "Edit" with two sections for adding rules. The first section, "Add rule(s) that includes keywords", contains a table with three rows. Each row has a "Rule no." column, a "Keywords" input field, an "Options" dropdown menu, an "Exact match" checkbox, and a "Delete" button. Row 1: Rule no. 1, Keywords: Tesla, Options: "Phrase", Exact match: unchecked. Row 2: Rule no. 2, Keywords: TSLA, Options: "Phrase", Exact match: checked. Row 3: Rule no. 3, Keywords: Elon Musk, Options: "Phrase", Exact match: unchecked. Below this table is an "ADD" button. The second section, "Add rule(s) that excludes keywords", contains a table with two rows. Row 1: Rule no. 1, Keywords: Nikola Tesla, Options: "Phrase", Exact match: unchecked. Row 2: Rule no. 2, Keywords: (empty), Options: "Phrase", Exact match: unchecked. Below this table is another "ADD" button. At the bottom of the window are "CLOSE" and "CONFIRM" buttons. An orange arrow points to the "Nikola Tesla" keyword in the exclusion table.

Rule no.	Keywords	Options	Exact match	Delete
1:	Tesla	"Phrase"	<input type="checkbox"/>	
<OR>				
2:	TSLA	"Phrase"	<input checked="" type="checkbox"/>	
<OR>				
3:	Elon Musk	"Phrase"	<input type="checkbox"/>	

ADD

Rule no.	Keywords	Options	Exact match	Delete
1:	Nikola Tesla	"Phrase"	<input type="checkbox"/>	
<OR>				
2:		"Phrase"	<input type="checkbox"/>	

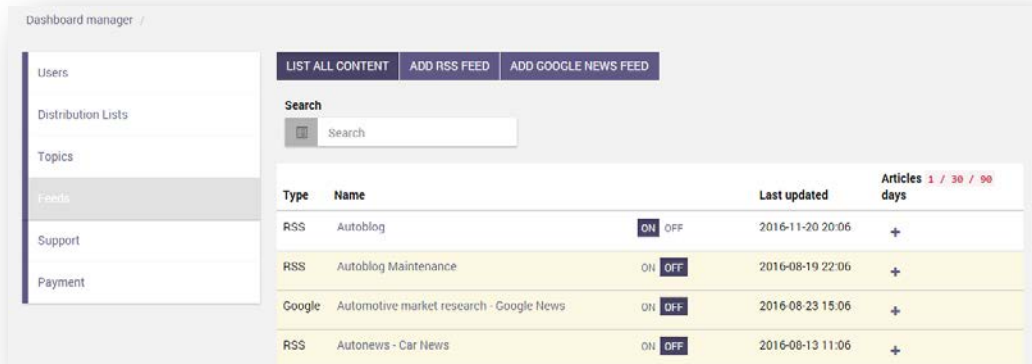
ADD

CLOSE CONFIRM

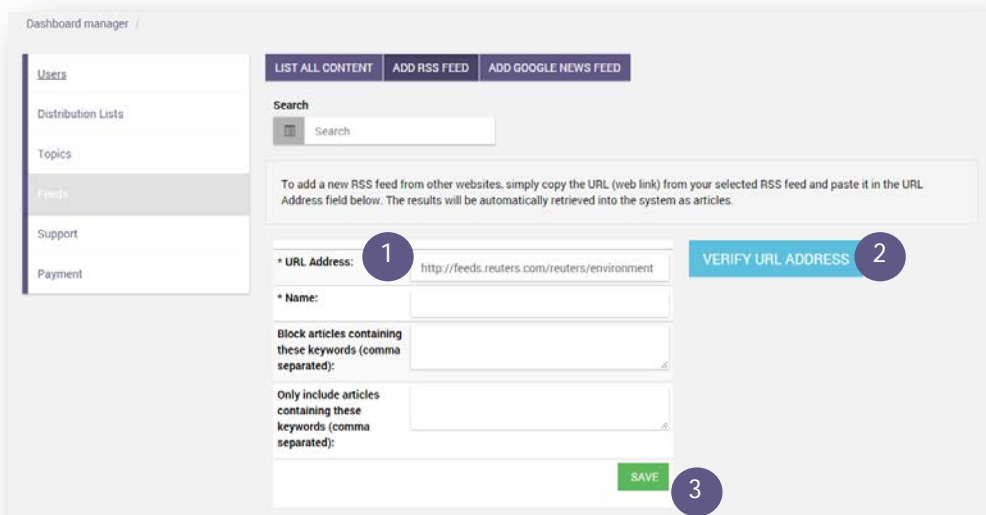
3 External Content

Content (RSS Feeds and Google Alerts) can be added from different sources on the external web.

Go to Admin - Feeds, Click on Add RSS Feed or Add Google News Feed



1. Copy/Paste the URL address for the RSS.
2. Click 'Verify URL Address'. IF verified OK, Name is automatically added.
3. Click <Save>. The RSS Feed has now been added.



The feed is added to the existing feed list and a sub topic is automatically created for the feed under the Feeds topic.

4 Publish internal information

Internal information can easily be published and presented in a standardized format.

Click on **Publish** in the menu.

The screenshot shows the 'Publish / Article' form. It features a 'Publication date' section with two input fields (2016-11-25 and 10:35) and a 'Source' field. Below this is a '* Title' field and a 'Summary' field. A rich text editor follows, equipped with a toolbar for text formatting (bold, italic, underline, link, unlink, list, etc.). At the bottom, there are 'Upload files' and 'Attach a link' sections, each with a '+ CHOOSE FILES' button and a '+' button. The form ends with two buttons: 'START OVER' and 'ADD TOPICS / PUBLISH'.

4.1 Write article

1. Start to type a title (required). Additional text can be added in the summary field and/or body text under the Word Editor.
2. Publication date: Can be changed manually.
3. Source: States per default the Publishers name. If field is completed with a Source name, both Source and Publisher's name show in article.
4. Upload Files and Links: Add files by upload or drag & drop. Copy/paste links in 'Attach a link' field.

4.2 Add Topics/Publish

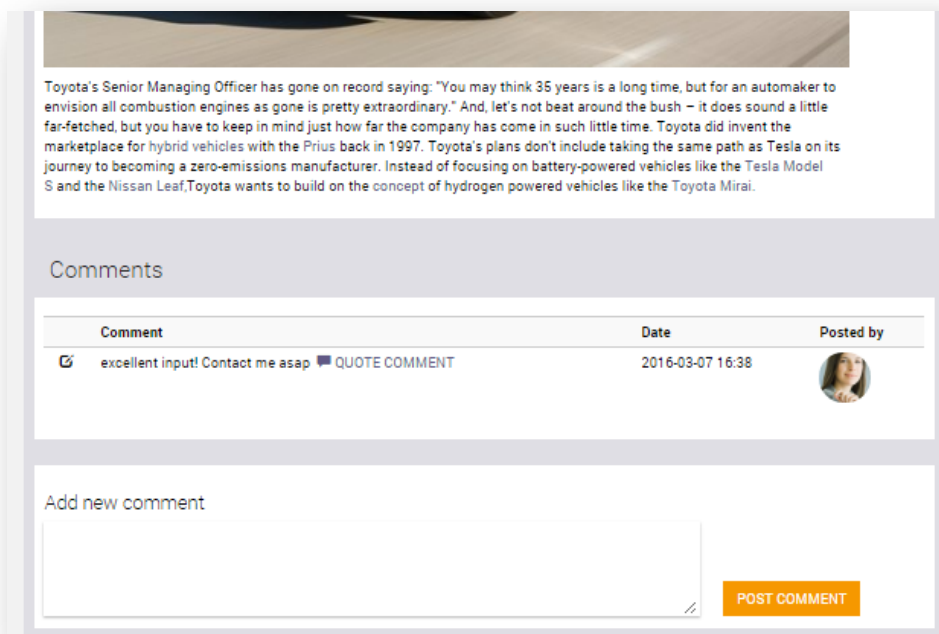
Topics are assigned automatically based on the content in your article. Topics can also be added manually by clicking on them from the topic tree (De-click topics facets in order to remove).

Click Publish to make article available.

Start over to erase content. Save draft to keep article under **Find - My Articles** for later reference.




4.3 Comment an article

Comment on an article by writing in the 'Add new comment' field below the article. Once the comment is posted, the article will be marked with a speech bubble for recognition. Comments are shown as 'Comments' facet on the Search page.



Toyota's Senior Managing Officer has gone on record saying: "You may think 35 years is a long time, but for an automaker to envision all combustion engines as gone is pretty extraordinary." And, let's not beat around the bush – it does sound a little far-fetched, but you have to keep in mind just how far the company has come in such little time. Toyota did invent the marketplace for hybrid vehicles with the Prius back in 1997. Toyota's plans don't include taking the same path as Tesla on its journey to becoming a zero-emissions manufacturer. Instead of focusing on battery-powered vehicles like the Tesla Model S and the Nissan Leaf, Toyota wants to build on the concept of hydrogen powered vehicles like the Toyota Mirai.

Comments


Comment	Date	Posted by
 excellent input! Contact me asap  QUOTE COMMENT	2016-03-07 16:38	

Add new comment

[POST COMMENT](#)

5 My Favorites

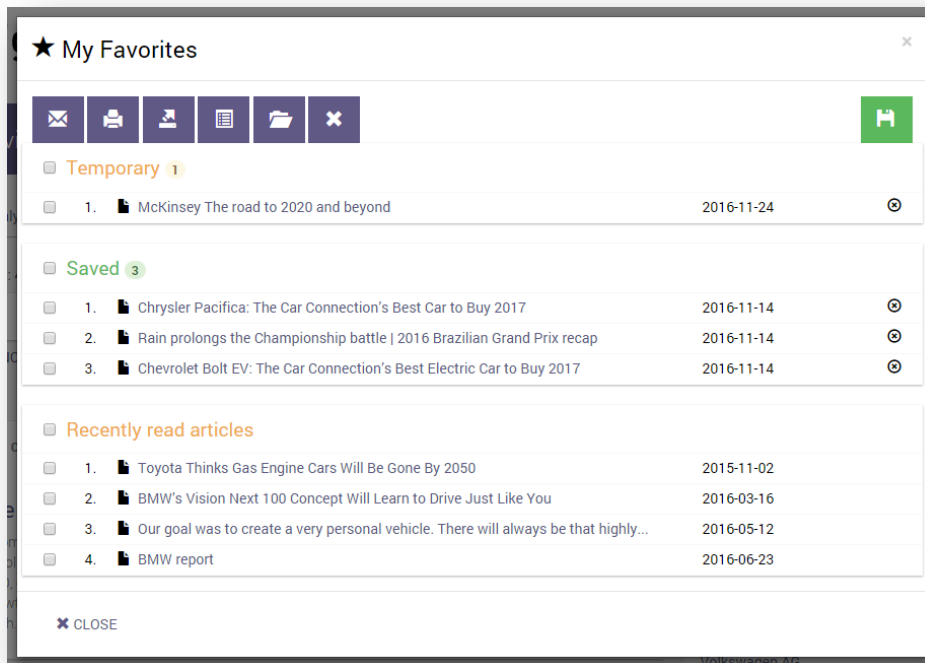
With My Favorites it is easy to collect articles and use them for later reference. Once articles are added to My Favorites, this will be indicated in red.

Click on the star symbol  next to the article so that it is placed to My Favorites. Once articles are added to My Favorites, this will be indicated in red.

Articles are first added under Temporary (valid during current session), from there they can be selected in order to do the following actions:

- Save articles to My Library, to save articles for long-term
- Share-by-mail
- Print

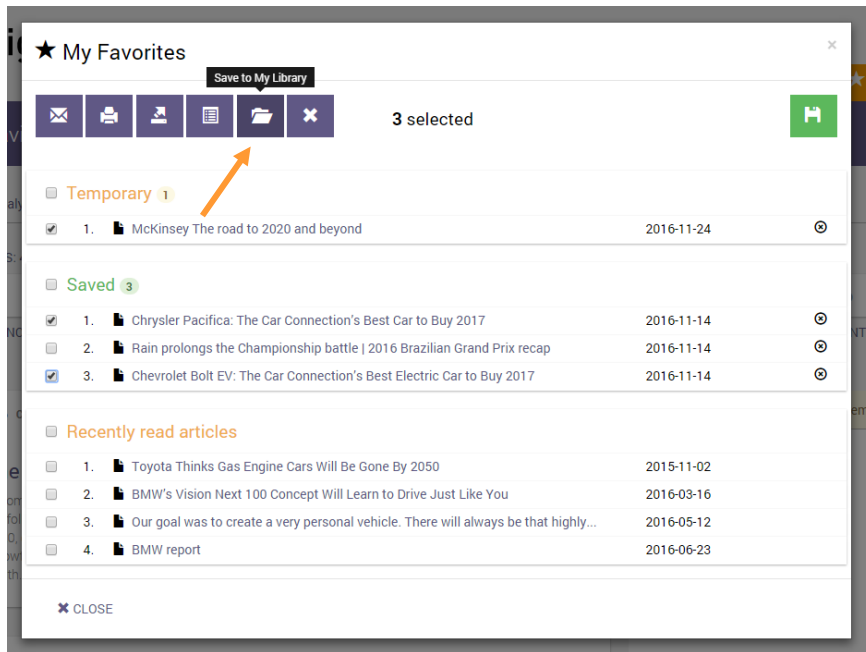
- Export
- Create Report
- Save in My Favorites, for short-term usage



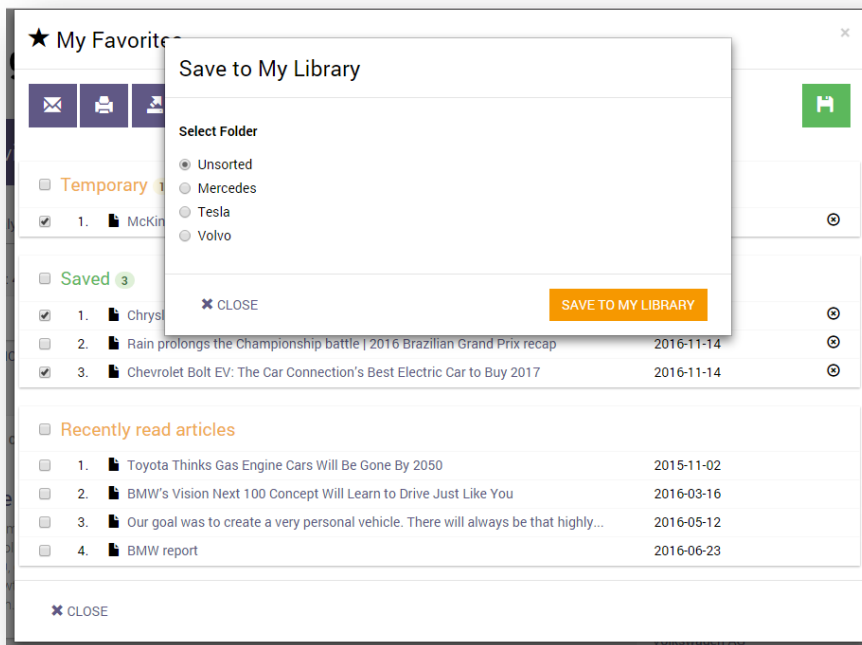
6 My Library

In **My Library**, articles can be stored in an unsorted list or in folders. Folders are very convenient to use in order to store articles in a structured way and to create reports conveniently.

Save articles to My Library: Check the articles you want to save to **My Favorites**. Click on the folder icon to save to **My Library**.



You will be asked if you want to save the articles to an **Unsorted** list or to folders that might already have been set up.



Add new folder

Name your folder and click the plus icon. It is also possible to create subfolders.

Personalize / My Library

My Library is where you find articles stored in folders and your created reports. New reports can be created from your favorites or your folders

From: YYYY-MM-DD To: YYYY-MM-DD

My Folders My Reports

Options for selected articles

SHARE BY E-MAIL PRINT ARTICLES EXPORT CREATE REPORT

Unsorted 5

Move/Remove

None Selected

Title	Date
McKinsey The road to 2020 and beyond	2016-11-24
Volkswagen emissions scandal expands to 11 million vehicles - Los Angeles Times	2015-09-23
September management briefing; Frankfurt review - just-auto.com (registration)	2015-09-23
Khamenei aims to ensure Iran deal won't lead to regime change The Times of ... - The Times of Israel	2015-07-22
Daimler teams up with China's Baidu in connected cars drive Reuters - Reuters	2015-05-26

Add Folder

Name

Mercedes 1

Tesla 1

Volvo 1

7 Create Reports

Reports can either be created directly from **My Favorites** or **My Library**.

Select the articles to be included in the report in **My Favorites** or **My Library** and click "Create Report".

My Folders My Reports

Options for selected articles

SHARE BY E-MAIL PRINT ARTICLES EXPORT CREATE REPORT

Unsorted 5

Move/Remove

None Selected

Add Folder

Name

Mercedes 1

Tesla 1

te Create Report / Add to Report

No name has been entered

Name

Weekly Report

Select Report Template (System) Select Report Template (Personal)

None Selected None Selected

Add to Report

None Selected

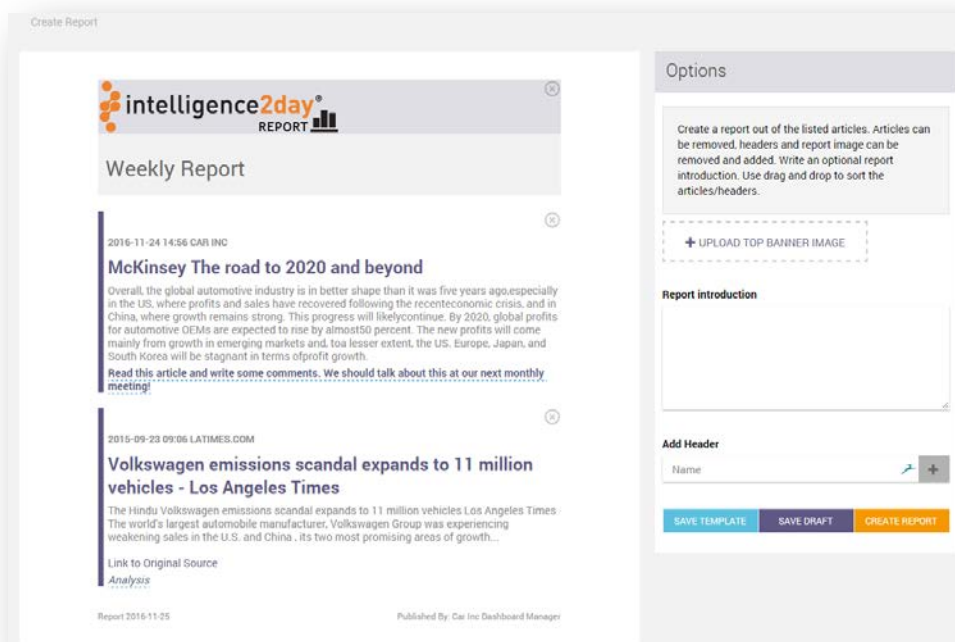
✕ CLOSE SAVE

ota Thinks Gas Engine Cars Will Be Gone By 2050 2015-11-02

7.1 Create new Report

Go through the following steps:

1. Name the report.
2. Select a Report Template (Intelligence Report, PEST Report, Priority Report, SWOT Report, Standard Report, Sentiment Report, and Weekly News Monitoring Report). Templates differ in different header options.
3. Select Report Template (personal): In case you want to use your personal header options from previous reports.
4. Click on "Save" to start creating your report.



In the Create Report mode you can change banner, add headers and comment/write analysis under each article.

- Save template - Template is saved to your personal templates
- Save draft - Report is saved in Draft mode section in My Library
- Create report - The report is added to your existing Reports

7.2 Add to Report

Choose **Add to report** if you want to add articles to an already existing report.

1. Upload a top banner image.
2. Add headers to differentiate between content.
3. Report Introduction: Add an introduction to the report.

8 Contact Support

Intelligence2day® provides world-class technical support services and an exceptional staff of highly skilled support engineers. Support is available during standard business hours via e-mail.

Intelligence2day® Professional is available round the clock (24/7/365), except for scheduled maintenance.

Please send all your support enquiries to support@intelligence2day.com

Intelligence2day® Professional has an extensive partner network of competitive intelligence specialists available to support you with:

- Information and content strategy
- Setting up a competitive intelligence function
- Creating taxonomies
- Monitoring data
- Intelligence consulting and benchmarking
- Market research
- Virtual analysts
- Intelligence training