CISION

Training and Educational Services

KEY POINTS
- Create and save Searches
- Save, filter, and edit Lists

CisionPoint: Search

SEARCH

Search, the first selection in the Plan dropdown, is a your gateway into our media database. You will input specific criteria into Search in an effort to narrow your results into a workable media List. Search is made up of 3 elements:


1. **Who** - The first section, Who, will help you identify the proper channel to receive your story. "Who" is the "I'm looking for" dropdown, and will default to Contacts. This can be either a specific Contact, or an entire media Outlet. Opportunities can also be identified in the "Who" section.
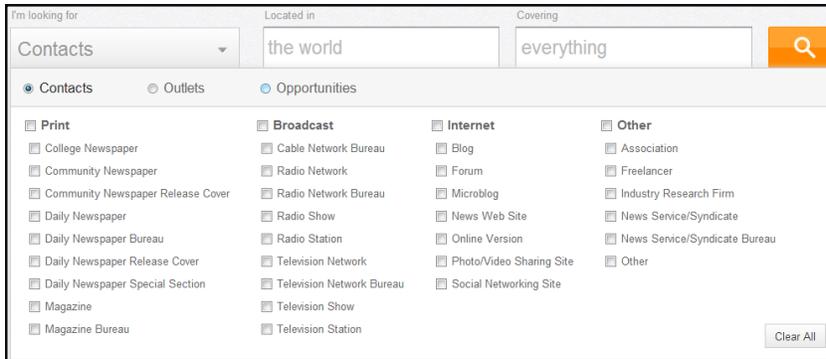
Clicking on Contacts will open a dropdown with further selections. Contacts, Outlets, and Opportunities each have their own selection button. Be sure that you have the correct item selected. Print, Broadcast, Internet, and Other, as well as the selections beneath each of those topics, appear for both the Contacts and Outlets selections. Clicking the box next to a media type will select every sub-type beneath it. Sub-types can be clicked individually for more specific results.

The selections for Opportunities differ from Contacts and Outlets.
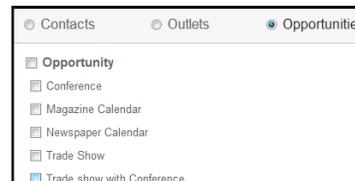
2. **Where** - In the second section, Where, you'll identify the areas or regions where the potential Contacts/Outlets should be located. The default is "the world." Like the SmartSearch bar, the results will begin to filter as you type. Multiple locations can be entered by selecting an initial location and then typing in another. In the image to the right, notice that the Chicago DMA and the city of Indianapolis are selected. DMA's and cities are independent and can be selected as such. Selections can be discarded by clicking on the X next to it. Clicking on "Browse All Locations" will open a selection tree that can also be used to select multiple locations.

Located in
2 locations
Indiana, United States of America
Indiana, Pennsylvania
Indiana County, Pennsylvania
Indianapolis, IN (DMA-26)
Selections
Chicago, IL (DMA-3) ✕
Indianapolis, Indiana ✕

3. **What** - What, the final section, is the topic(s) you would like to cover. The default is "everything." Just like the Where section, results will filter as you type and multiple can be added at once. You can also do a keyword search if your desired topic doesn't match any of the database options.

Clicking on the orange magnifying glass icon will conduct the search.

Covering
2 topics
Technical
Technology Industry
Analog **Technology**
Retail **Technology**
Satellite **Technology**
Education **Technology**
Ethernet **Technology**
Government **Technology**
...or search for the keyword **"tech"** in Profiles & Titles
Selections
Technology ✕
Green Technology ✕

LISTS

Lists are the results of the entered search criteria. There are many options for lists including editing, filtering, and saving. The returned list may not always be perfect. If the search qualifications need to be changed, click on the pencil icon and you will be allowed to revise the search.

Searching **Outlets** in **2 locations** Covering **2 topics**   ✏   💾

If you find this search particularly useful, and you believe you'll use it again, click on the green disk icon and you can save the search qualifications. Updates made to our database will reflect in the search each time you access a saved search. Saved searches can be accessed from the Plan menu by clicking on Lists and Searches.

The next area on the list page are the filters. Filters are used to narrow the list to the desired result.

Additional Filters	Country		City		Media Type	
State/Province	152	United States of America	69	Chicago	77	Magazine
Market (DMA)			9	Itasca	32	News Web Site
Focus			9	Indianapolis	23	Blog
Coverage (GDA)			6	Northfield	20	Online Version
Social Media			6	Des Plaines		
Language			4	Vernon Hills		
Audience Type			4	Deerfield		
Broadcast Network			3	Wilmette		
Ethnicity			3	Park Ridge		
Market (MSA)			3	Orland Park		
Text Search			3	Oakbrook Terrace		
			3	Carol Stream		

This list is made up of 152 results. By clicking on a filter, the results will narrow to the number besides the item. In the picture to the right, for example, Chicago was selected and the results narrowed to 69. Additional items can be clicked to increase the total. The number 1, with the checkmark next to it, in the upper right indicates how many items have been selected. Place the cursor over the checkmark to remove the selected items.

The green circle in the upper right toggles between including/excluding items. Click on the green circle to switch to excluding items. In this same example, clicking on Chicago while in exclude mode will narrow the 152 total results to 83.
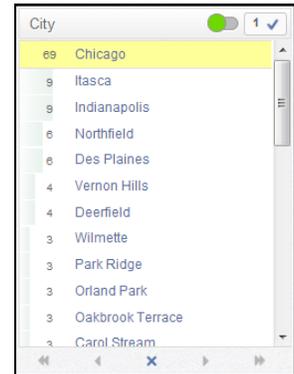
Clicking on an additional filter will add it to the filter row for use. The additional filters can also be hidden using the green arrow.
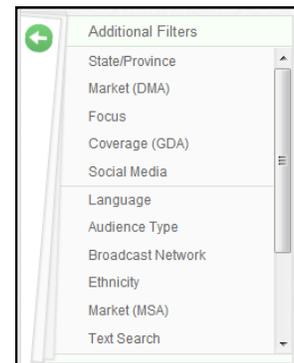
The results display below the filters. Each item has a check box next to it. Clicking the box will select the item. The check box at the top will allow you to select all of the items on the page, or every item in the entire list.

In addition to narrowing your results by utilizing filters, there are a number for display settings available as well.

- Hide Profiles: This option will remove the profile text from the list view.

- Change Display Configuration: There are several options that will allow you to change the primary information displayed in the list.

- Change View Option: This option allows you to toggle between the full list view and a smaller, more compact view.
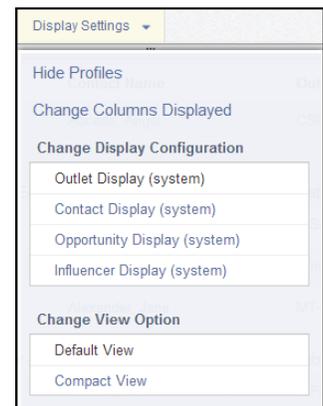
Change Columns Displayed allows you to customize how you see the information displayed in the list. You can choose whether or not you want to see a column, and what order they appear in. The Available Columns box displays columns that are not currently in the list view. The Selected Columns box shows the columns that are currently displaying. Select a column and use the left and right facing arrow to toggle a column between hide and display. The top facing arrow and the bottom facing arrow will allow you to customize the order in which the columns appear in the list.

Click the orange Apply button to make the selected changes to the column display. Column settings can also be saved for future use. Name the setting and click Save and Apply .
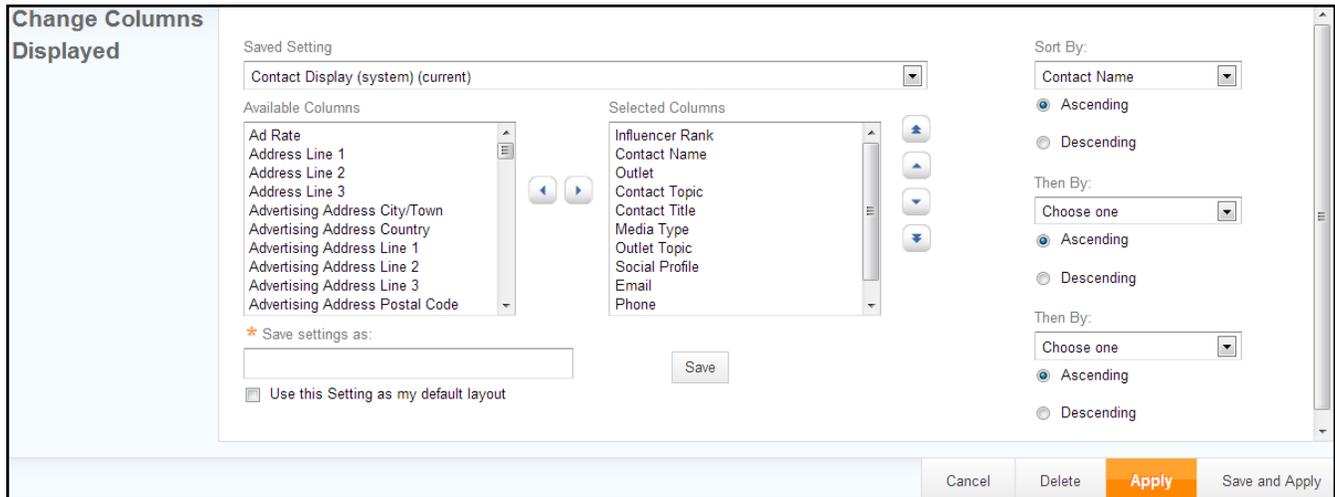
The options under Edit apply to selected items. Save As List will save the selected items as a List for future reference. Add To will allow you to add the selected items to an existing list. Remove will delete the selected items from the list view.
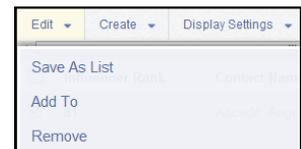
The Create menu features multiple options for working with the list.

- Distribution: This will open the Distribution wizard and allow you to reach out to the selected contacts/outlets. We'll have more on this in the Connect section.

- Report: A multitude of different concise reports can be created from the list using this option.

- Note: You can upload a note to a single item or multiple items in a single batch.

- Activity: You can assign an activity to a single item or multiple items at once.

- Export: This option allows you to download the information in the list into either a CSV file or an Excel file.
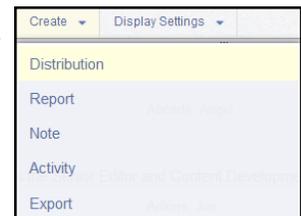
Lists & Searches is where you will find your saved lists and searches.