

Start S&P Capital IQ Pro

(Quick Reference Guide)

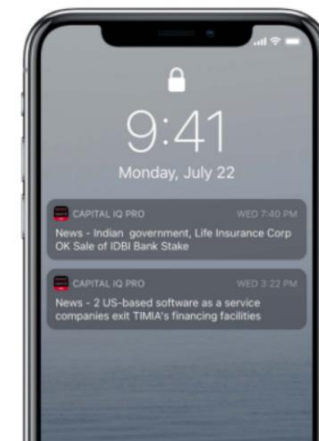
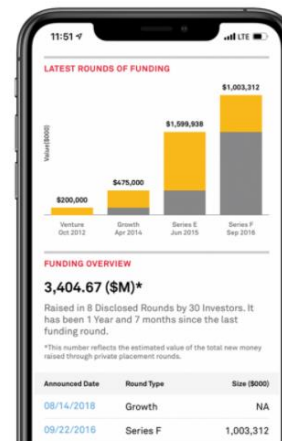
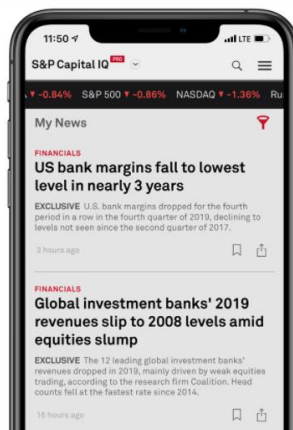
August 2021

S&P Global

Market Intelligence

移动端App

- CIQ Pro全新的手机App，可随时随地查看公司信息（财务、股价、券商预测、重大事件、投资并购交易、股权结构等），收取不同行业和地区的独家新闻，便于随时追踪全球公司的实时动态。
- 下载：应用商店搜索“S&P Global” (iOS& Android)，或者扫描下方二维码下载。
- **注意：**目前Capital IQ Pro 手机软件Android版本只能通过Google Play下载，由于防火墙限制部分中国区用户可能无法访问，我们正在尽快将Android版手机App上架中国地区可访问的应用市场



公司数据覆盖——增加中国、亚太区及欧洲私营公司

- 除了Capital IQ里99%的上市公司和800万家非上市公司数据，CIQ Pro平台新增了
 - 来自Crunchbase 的超过95万家早期公司数据及超过21万条交易数据
 - 约300万家英国非上市公司信息，约25万家东欧及亚太区非上市公司信息
 - 2021年上半年之前，将完成4000万家西欧及北欧地区、600万家美国非上市公司信息的增加及完善

| | Market(s) | # of Cos | Corporate Profile | Financials | Ownership | People |
|-------|---------------------------------------|------------------|-------------------|------------|-----------|--------|
| H1'20 | United Kingdom | 3M | ✓ | ✓ | | |
| | Eastern Europe & Asia-Pacific | 250k | ✓ | ✓ | | |
| H2'20 | Western Europe & Nordics ¹ | 7M | ✓ | ✓ | | |
| H1'21 | Western Europe & Nordics ¹ | 40M ² | ✓ | | ✓ | ✓ |
| | USA ³ | 6M | ✓ | | | |

¹Countries include UK, France, Germany, Italy, Netherlands, Sweden, Belgium, Norway, Denmark, Ireland, Luxembourg.

²Includes integration of Ownership, People data for the 10.4M companies in Phase I

³US coverage includes corporate profile and trade payment data only

| | | Company Expansion | | Transaction Expansion | | |
|--|--|---------------------------|---------|-----------------------|---------|------|
| Scope of Expanded Coverage: | | # of Companies | % Total | # of Deals | % Total | |
| Integration of nearly 1,000,000 companies – typically early stage, venture backed companies | | Americas | 463,600 | 48% | 58,500 | 50% |
| | | United States & Canada | 426,500 | 48% | 52,600 | 45% |
| | | Latin America & Caribbean | 37,100 | 2% | 5,900 | 5% |
| Addition of 210,000+ private placements (particularly Seed and Series A), including 125,000+ net new to existing coverage | | EMEA | 318,600 | 30% | 40,700 | 33% |
| | | Europe | 289,200 | 24% | 35,900 | 29% |
| | | Middle East | 18,700 | 3% | 3,200 | 3% |
| | | Africa | 10,700 | 1% | 1,600 | 1% |
| Additional Details: | | Asia-Pacific | 155,600 | 13% | 19,400 | 16% |
| New fields: Categories, Social Media handles | | Coverage Total | 959,900 | 100% | 125,000 | 100% |
| Audit/Source capability for data points that are from Crunchbase | | | | | | |
| Higher frequency of Business Descriptions updates | | | | | | |

账号初始设置

- Profile Specialization 请选择 Generalist, 并选择适合的 Language, Currency, Date & Number Format 等选项

Profile Specialization *

Language ⓘ

Culture ⓘ

Currency ⓘ

Conversion Method ⓘ

Sharing Access

Generalist

Select Specialization

Generalist

Community Bank

Credit Risk

Energy

ESG

Financials

Healthcare

Metals & Mining

RatingsDirect

Real Estate

Technology, Media & Telecommunications

Language ⓘ Chinese

Culture ⓘ Custom

Currency ⓘ Reported Currency

Conversion Method ⓘ MI recommended

Date & Number Format ⓘ English (Americas)

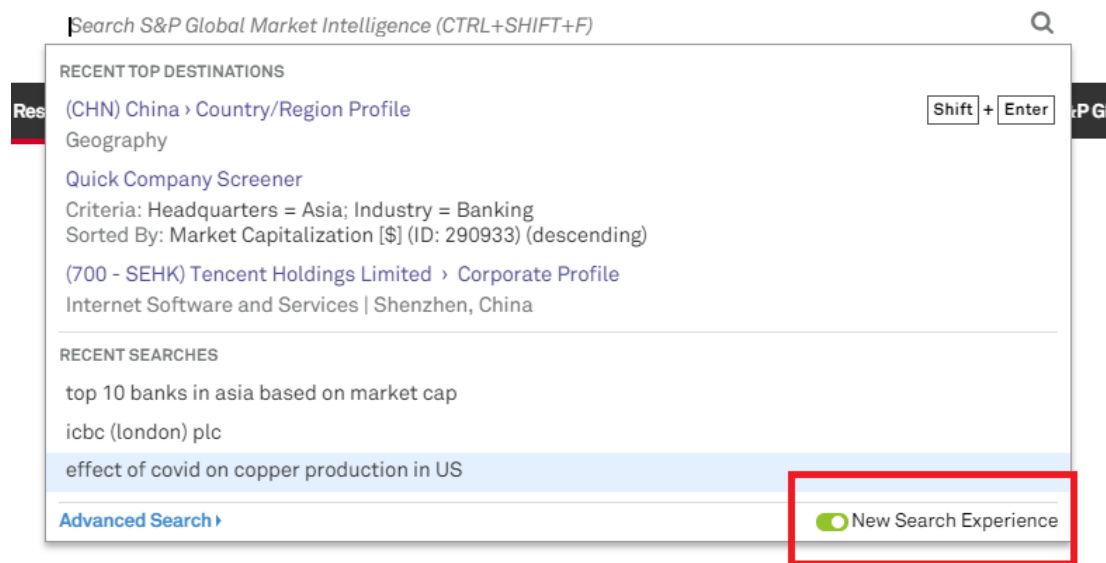
Time Zone ⓘ (GMT+08:00) Beijing, Chongqing, Hong Kong, ...

Terminology ⓘ English (Americas)

Unit of Measure ⓘ U.S. Customary

Discoverability: 自然语言智能搜索

- Capital IQ原有搜索功能只能按照关键字搜索公司、行业等结果，CIQ Pro的新搜索功能类似于Google 和 Baidu 搜索，可以将自然语言进行处理，用户可以直接输入诸如 “top 10 IT companies by market cap” 作为搜索条件，而系统也会快速地为我们得出结果。
- 新增跨内容搜索功能，如输入digital payment，则可在所有数据类别中进行搜索，结果会显示在公司名称、公司业务描述、新闻、研究报告等多类别信息中出现该关键词的结果



Discoverability: 更清晰的搜索记录

更清晰的资产类型标签

appl

TOP DESTINATIONS

(NYSE:EPAC) Enerpac Tool Group Corp. > Corporate Profile (SHIFT+ENTER)

Machinery: Industrial | Menomonee Falls, Wisconsin, USA

(NASDAQ:APPF) AppFolio, Inc. > Corporate Profile

Application Software | Santa Barbara, California, USA

Appaloosa > Fund Profile

Equity | Operating

(NYSE:APLE) Apple Hospitality REIT, Inc. > Corporate Profile

Hotel REIT | Richmond, Virginia, USA

Apple Tree Partners II - Annex, L.P. > Fund Profile

Private Equity or VC | Operating

PUBLIC COMPANY

PUBLIC COMPANY

PUBLIC FUND

PUBLIC COMPANY

PRIVATE FUND

近期搜索结果拓展

Search S&P Global Market

Clear Recent Searches

RECENT TOP DESTINATIONS

(ENXTAM:RDSA) Royal Dutch Shell plc > Corporate Profile (SHIFT+ENTER)

Integrated Oil and Gas | The Hague, Netherlands

(LSE:BP) BP p.l.c. > Corporate Profile

Integrated Oil and Gas | London, United Kingdom

(LSE:BA) BAE Systems plc > Corporate Profile

Aerospace and Defense | London, United Kingdom

(XETRA:ADS) adidas AG > Corporate Profile

Apparel, Accessories and Luxury Goods | Herzogenaurach, Germany

(LSE:BARC) Barclays Plc > Corporate Profile

Bank | London, United Kingdom

UBS Investment Bank > Corporate Profile

London, United Kingdom

(LSE:BARC) Barclays Plc > Corporate Profile

Bank | London, United Kingdom

(XETRA:ADS) adidas AG > Corporate Profile

Apparel, Accessories and Luxury Goods | Herzogenaurach, Germany

RECENT SEARCHES

german tech m&a deal value greater than 100m 2020

top german tech companies by revenue

top german tech companies revenue

Advanced Search

New Search Experience

搜索结果中加粗的关键字

appl

TOP DESTINATIONS

(NASDAQGS:AAPL) Apple Inc. > Corporate Profile (SHIFT+ENTER)

Technology Hardware, Storage and Peripherals | Cupertino, California, USA

Apple Fund I > Fund Profile

Private Equity or VC | Fully Invested

Apple Fund II > Fund Profile

Private Equity or VC | Fully Invested

Apple Bancorp, Inc. > Corporate Profile

New York, New York, USA

Apple Vacations, LLC > Corporate Profile

Newtown Square, Pennsylvania, USA

SUGGESTED SEARCHES

apple

apple watch

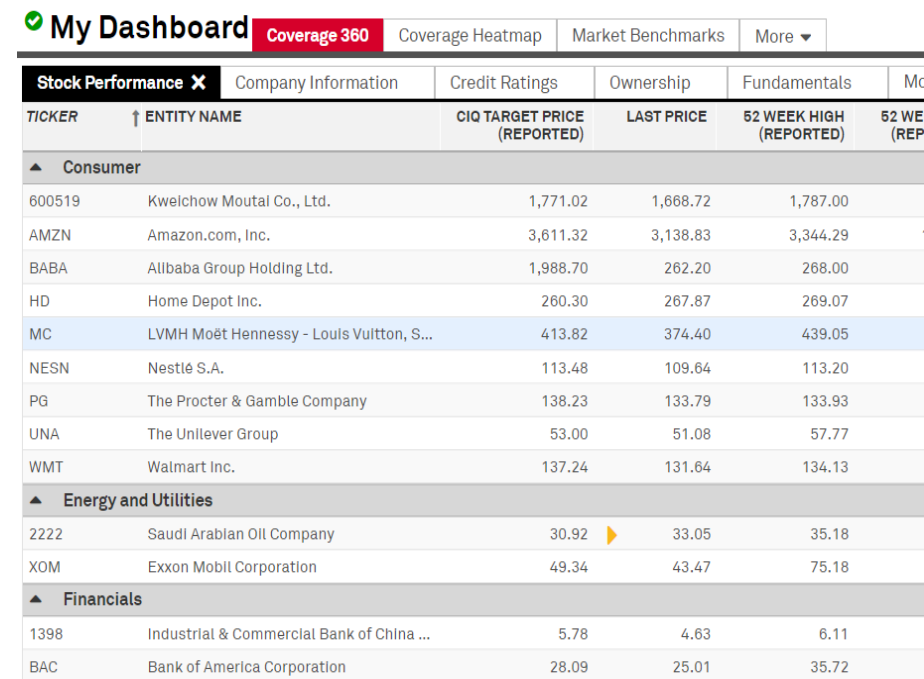
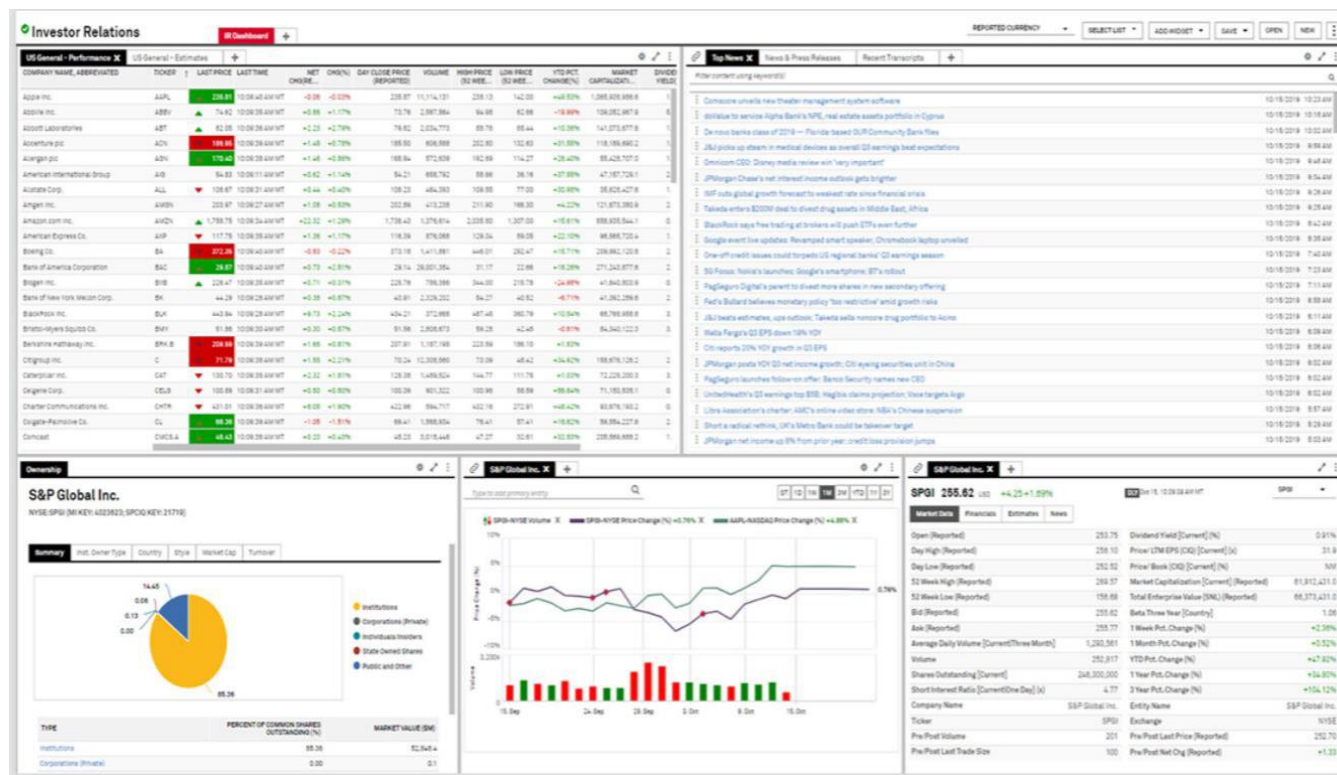
apple shares

Advanced Search

New Search Experience

控制面板: 依据场景定制, 建立自己专属的资讯面板

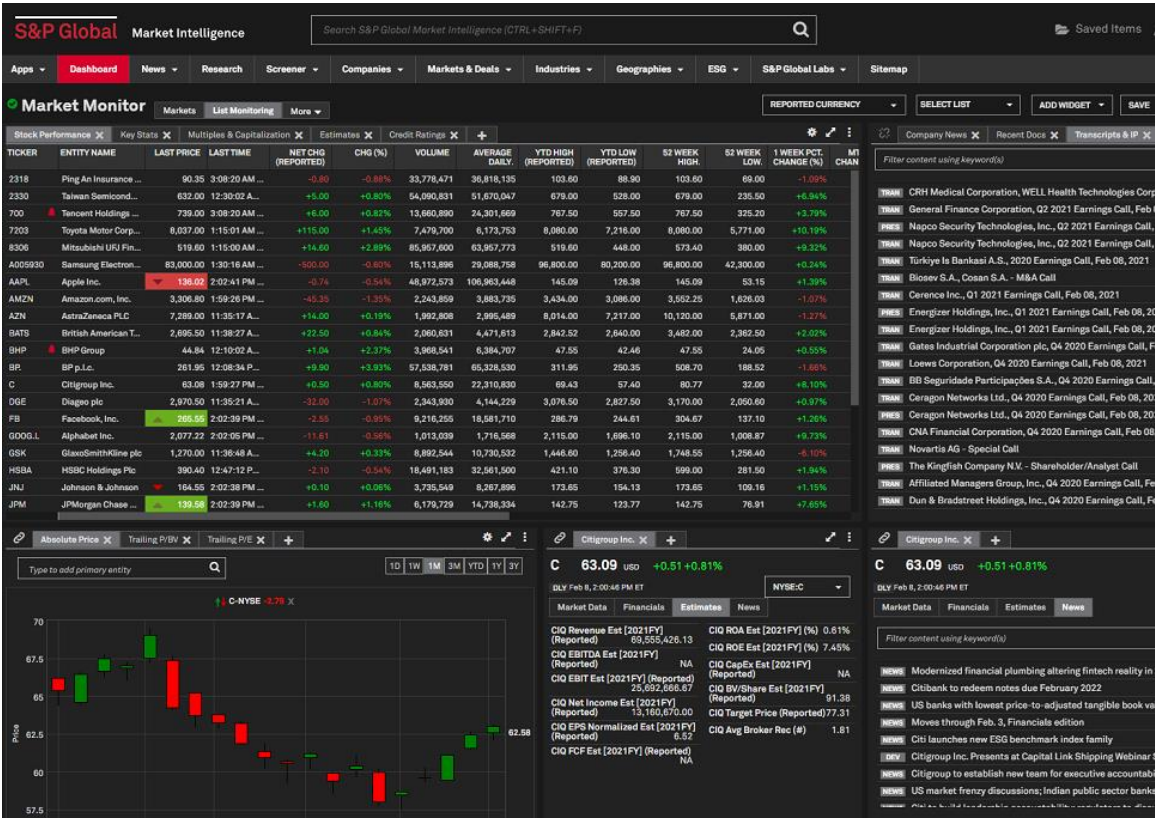
- 基于不同职位的工作重点，建立了相应的监控面板，便于批量追踪公司的最新动态（实时股价、市场数据、财务信息、股东信息、新闻等）。用户也可根据自己的偏好，自定义控制面板。



控制面板: 更便捷的组合分析

自定义分组, 可通过拖拽方式重新排列; 按基金、多/空仓位、目标等排列, 以简化市场监测。

| Long Short | | | | | | | | |
|------------------------|----------------------|------------|--------------|-----------|-------------------------|--------------------|--------------------|--------------|
| Portfolio | | Long Short | | Benchmark | | NA | | |
| | ENTITY NAME | LAST PRICE | NET CHG (\$) | CHG (%) | CONTRIBUTIO TO RETUR... | MARKET VALUE (...) | GAIN/LOSS (P) (\$) | 1 WEEK PCT.. |
| Totals | | | | | -299.176% | 8,996 | +13,519 | |
| Long Positio | | | | | +120.683% | -955,410 | -5,471 | |
| | MDY SPDR S&P ... | 455.76 | +4.44 | +0.98% | +106.692% | -497,234 | -4,844 | +4.80% |
| Add Grouping Row | | 179.05 | +0.17 | +0.10% | +5.636% | -255,146 | -242 | +3.31% |
| Open Corporate Profile | | 546.25 | -4.55 | -0.83% | -12.938% | -69,919 | +582 | +1.35% |
| Expand All Groups | | 280.64 | +7.83 | +2.87% | +17.658% | -28,625 | -799 | +16.04% |
| Collapse All Groups | | 277.59 | -1.28 | -0.46% | -2.581% | -25,260 | +116 | +2.78% |
| | UNH UnitedHealt... | 324.3 | -0.19 | -0.06% | -0.306% | -23,027 | +13 | -2.94% |
| | INTC Intel Corpor... | 58.83 | +0.65 | +1.11% | +4.855% | -20,001 | -219 | +3.75% |
| | RCL Royal Carib... | 70.74 | -0.84 | -1.17% | -3.093% | 11,914 | +140 | +7.54% |
| Short Positi | | | | | -419.859% | 964,406 | +18,990 | |
| | CCL Carnival Cor... | 21.45 | +0.14 | +0.63% | -1.330% | 9,607 | +60 | +14.04% |
| | BA Boeing Com... | 209.57 | +1.64 | +0.79% | -1.961% | 11,317 | +88 | +7.01% |
| | VLO Valero Ener | 65.04 | +3.32 | +5.38% | -15.051% | 12,333 | +681 | +15.68% |



控制面板: 列表导出更迅速, 可与他人分享

Germany Dashboard

Coverage List

U.S. DOLLAR (USD)

SELECT LIST

ADD WIDGET

Filter content using keyword(s)

Deutsche Telekom AG, Q3 2021 Earnings Call, Nov 12, 2021

Delivery Hero SE to Report Q3, 2021 Results on Nov 11, 2021

RWE Aktiengesellschaft to Report Nine Months, 2021 Results on Nov 11, 2021

E.ON SE to Report Nine Months, 2021 Results on Nov 10, 2021

Allianz SE to Report Q3, 2021 Results on Nov 10, 2021

Allianz SE, Q3 2021 Earnings Call, Nov 10, 2021

Münchener Rückversicherungs-Gesellschaft Aktiengesellschaft to Report Q3, 2021 Results on Nov 08, 2021

Henkel AG & Co. KGaA to Report Q3, 2021 Results on Nov 08, 2021

Save

Save As

Open

New

Share

Reload Default Dashboard

Full Screen

Flash on Trade

Enable Dark Mode

Help

Field Selector

Save As New List

Reload List

Split List

Global Sort

Export to Excel as Data

Copy Widget

Paste Widget

Close

| TICKER | ↑ ENTITY NAME | MARKET CAPITALIZATION (\$M) | DAY CLOSE PRICE (\$) | LAST PRICE | CIQ TARGET PRICE (\$) | 52 WEEK HIGH (\$) | 52 WEEK LOW (\$) | CHG (%) | 1 MONTH |
|----------------------|-----------------------------------|-----------------------------|----------------------|------------|-----------------------|-------------------|------------------|---------|---------|
| Consumer | | | | | | | | | |
| ADS | adidas AG | 65,362.9 | 335.14 | 335.14 | 346.00 | 368.94 | 195.12 | +1.46% | |
| BEI | Beiersdorf Aktiengesellschaft | 25,374.9 | 111.87 | 111.87 | 115.01 | 129.32 | 93.37 | +1.73% | |
| BMW | Bayerische Motoren Werke Aktie... | 54,503.6 | 84.27 | 84.27 | 95.42 | 93.00 | 44.02 | -1.02% | |
| CON | Continental Aktiengesellschaft | 30,050.2 | 150.25 | 150.25 | 150.05 | 152.23 | 61.89 | +0.48% | |
| DAI | Daimler AG | 86,212.5 | 80.58 | 80.58 | 81.40 | 80.73 | 25.28 | +1.65% | |
| HER | Delivery Hero SE | 33,095.5 | 158.55 | 158.55 | 165.82 | 174.91 | 60.36 | +1.74% | |
| HEN3 | Henkel AG & Co. KGaA | 42,574.0 | 104.82 | 104.82 | 112.24 | 114.45 | 74.87 | -0.14% | |
| VOW3 | Volkswagen AG | 104,646.9 | 195.04 | 195.04 | 220.88 | 209.79 | 95.49 | -1.52% | |
| ZAL | Zalando SE | 29,838.1 | 118.49 | 118.49 | 109.53 | 122.88 | 32.88 | +1.30% | +1.97% |
| Energy and Utilities | | | | | | | | | |
| EOAN | E.ON SE | 27,626.3 | 10.60 | 10.60 | 13.08 | 13.91 | 9.14 | -0.25% | -1.37% |
| IGY | innogy SE | 29,137.7 | 52.45 | - | NA | - | - | - | - |
| RWE | RWE Aktiengesellschaft | 29,465.4 | 43.59 | 43.59 | 48.57 | 46.49 | 24.12 | -0.03% | +2.95% |

U.S. DOLLAR (USD)

SELECT LIST

ADD WIDGET

Filter content using keyword(s)

Deutsche Telekom AG, Q3 2021 Earnings Call, Nov 12, 2021

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Save

Save As

Open

New

Share

Reload Default Dashboard

Full Screen

Flash on Trade

Enable Dark Mode

Help

Field Selector

Save As New List

Reload List

Split List

Global Sort

Export to Excel as Data

Copy Widget

Paste Widget

Close

DASHBOARD NAME

My Dashboard

South Africa Dashboard

Germany Dashboard

Rename

Duplicate

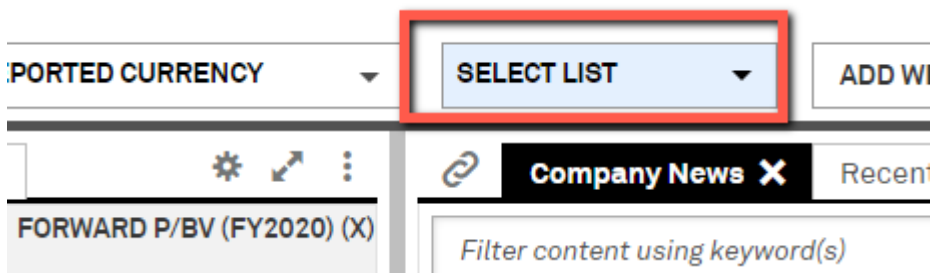
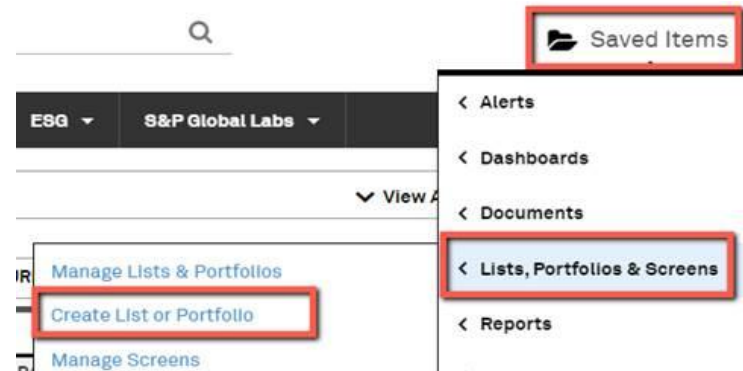
Share

Delete

Banks Dashboard

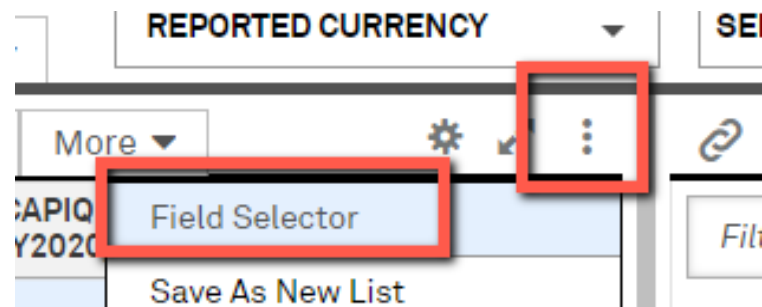
Watch List: 导入关注公司，便于长期追踪公司资讯

- 点击右上角的Saved Items，选择Lists, Portfolios & Screens，点击Create List& Portfolios，建立Watch List



- 建立好之后，可以在Dashboard的Select List的下拉菜单选择之前建立好的观察列表，追踪公司的动态

- 在Dashboard当中，可以点击右上角的，选择Field selector，添加自己关注的板块



新闻： CIQ Pro独家新闻报告，覆盖多个行业

- 按照Topic对新闻进行了分类，一共包含42个Topic比如M&A, Regulation, Policy& Law, Industry News, Retail, Drug Development, Bankruptcy& Distressed等。

| ^ Topics | ▼ Film & TV Programming | |
|---------------------------|--------------------------|----------------------------|
| ▼ Advertising | ▼ Fixed Income | |
| ▼ Bankruptcy & Distressed | ▼ In the Boardroom | ▼ Product Lines |
| ▼ Broadband & Voice | ▼ Industry News | ▼ Products |
| ▼ Broadcast | ▼ Internet Media & OTT | ▼ Project Developments |
| ▼ Capital Markets | ▼ Leveraged Loans | ▼ Property |
| ▼ Commodities | ▼ Mergers & Acquisitions | ▼ Rates & Tariffs |
| ▼ Consumer Insights | ▼ Midstream | ▼ Ratings & Research |
| ▼ Cyber Risk | ▼ Mining | ▼ Regulation, Policy & Law |
| ▼ Downstream | ▼ Mobile | ▼ Renewables |
| ▼ Drug Development | ▼ Multichannel | ▼ Retail |
| ▼ Earnings & Guidance | ▼ Operations & Strategy | ▼ Securitization |
| ▼ Electric Generation | ▼ Personnel | ▼ Technology |
| ▼ Environment | ▼ Power Grid | ▼ TV Networks |
| ▼ ESG | ▼ Private Equity | ▼ Upstream |

新闻：CIQ Pro独家新闻报告，覆盖多个行业

- Daily Dose (Recaps): 我们每天将媒体发布的新闻进行梳理并且提炼要点信息，将不同行业的新闻，按照地区或者细分行业，整理归类，可以很方便、快速的了解行业动态。
- Data Dispatch (News and Analytics): 我们的新闻团队每天发布独家大量新闻，覆盖金融机构、房地产、能源、材料医疗、工业、消费品、TMT等

S&P Global Market Intelligence

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BREAKING NEWS US weekly jobless claims total 1.19 million 8:38 PM

Editors' Picks

Of Mice Not Men: New Alzheimer's target in mice; microbiome's social cues; bite-free... 1 day ago

The end of loan moratoria will be test for Piraeus Bank, CEO says 1 day ago

J&J nabs \$1B under US Warp Speed for 100 million doses of COVID-19 vaccine 1 day ago

The Daily Dose

List SELECT LIST... FILTERS Industry Financials, Real Estate, Energ... Geography United States and Canada, Lat...

Sector Spotlight

EXTRA Sector Spotlight: Tech taking hold in M&A talks; US banks' healthcare portfolios hold up 2 days ago

EXTRA Sector Spotlight: Political ad revenue surge; Big Tech lobbying spending 2 days ago

EXTRA Sector Spotlight: Energy editors' picks: Oil majors on climate goals; decarbonization in mining 5 days ago

EXTRA Sector Spotlight: Energy, most read: Gas bridge fuel doubts; AEP linked to dark money group 5 days ago

US aims for 'Clean Network'; Microsoft seeks early end to TikTok talks
EXTRA S&P Global Market Intelligence's daily overview of essential Technology, Media and Telecommunications news in the U.S. and Canada. 29 minutes ago

Bausch Health spinoff; J&J's \$1B COVID-19 shot funding; Bristol-Myers Q2 EPS up
EXTRA S&P Global Market Intelligence's daily overview of essential healthcare news worldwide. 41 minutes ago

Court halts Dakota Access shutdown; McNamee sets FERC departure date
EXTRA S&P Global Market Intelligence's daily overview of essential energy and

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Publications

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Mergers & Acquisitions
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Earnings & Guidance

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Data Dispatch Asia-Pacific
Data Dispatch EMEA
Data Dispatch Latin America
The Daily Dose
The Daily Dose Asia-Pacific
The Daily Dose Europe
The Daily Dose Latin America

RELATED
Advanced News Search
RSS Feeds

新闻： 设置实时或定时提醒

- 您可按照自己主要关注的行业和话题设置实时或者定时的新闻推送。这样可以方便您在上下班的时候快速了解当天的市场动态。您可以直接点击报告里的Create Alert 标签设置新闻推送。
- 或者点击平台右上角Saved Items 里的Alerts > Create New Alert

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Hover over any page below and click the ★ to pin it.

^ News by Sector (MI)

- Financials
- Real Estate
- Energy & Utilities
- Materials
- Healthcare
- Industrials
- Consumer
- Technology, Media and Telecommunications

Pfizer expects \$15B in COVID-19 vaccine sales in 2021; some analysts see more **EXTRA**

Wednesday, February 3, 2021 3:40 AM SGT

By [Michael Gibney](#)
Market Intelligence

ADD TO ▼ **CREATE ALERT** EMAIL PRINT PDF FEEDBACK A+ A-

[Pfizer Inc.](#) said the [U.S.-authorized](#) COVID-19 vaccine Comirnaty is expected to bring in \$15 billion in 2021 revenue for the pharmaceutical giant — nearly as much as its top three best-selling products generated last year.

The New York-based company is prepared to deliver at least 2 billion doses of the vaccine around the world in 2021, with 200 million doses to the U.S. by the end of May, executives said on Pfizer's fourth-quarter and full-year 2020 earnings call.

CTRL+SHIFT+F

Create New Alert
Manage Alerts

Country

Central banks must play a lead role in developing digital money, BIS says
1 day ago

ine sales in

Top News

EXCLUSIVE Biotech research league by keeping crowdfunder impact on Robinhood

FINANCIALS RESEARCH Researcher: Banks struggle with SME data gaps

Alerts
Dashboards
Documents
Lists, Portfolios & Screens
Reports
Searches
Shared Items
Shortcuts

IMPORT MY SAVED ITEMS

财务信息：数据来源多元，涵盖Capital IQ和SNL Financial

- 添加了Financial Highlights页面，方便您快速了解公司的财务信息。
- 数据的默认来源为 “Recommended”，根据公司所在行业，该页面将显示SNL Financial或Capital IQ作为默认数据。

S&P Global

Market Intelligence

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Key Stats

Templated

Financial Highlights

Income Statement

Balance Sheet

Cash Flow

Performance Analysis

Industry Supplemental - Airlines

Segment Analysis

Pension Details

Air China Limited - 中国国际航空股份有限公司

FINANCIAL HIGHLIGHTS

SEHK:753, SHSE:601111, OTCPK:AIRY.Y (MI KEY: 4545511; SPCIQ KEY: 12436039)

CREATE ALERT

Currency

REPORTED CURRENCY

Source

Recommended

Periods

Last Four Years & YTD

FILTERS

Source

Recommended

Periods

Last Four Years & YTD

Magnitude

Thousands (K)

RECOMMENDED: S&P CAPITAL IQ - STANDARD

| | 2016 FY | 2017 FY | 2018 FY | 2019 FY | 2020 FQ3 YTD |
|------------------------|------------------|------------------|------------------|------------------|------------------|
| Current/Restated | Current/Restated | Current/Restated | Current/Restated | Current/Restated | Current/Restated |
| Period Ended | 2016/12/31 | 2017/12/31 | 2018/12/31 | 2019/12/31 | 2020/9/30 |
| Financial Filing Date | 2018/3/27 | 2019/3/27 | 2020/3/31 | 2020/3/31 | 2020/10/30 |
| Reported Currency Code | CNY | CNY | CNY | CNY | CNY |

Screener: 个性化和Capital IQ导入

个性化

The screenshot shows the 'Settings' panel for the Screener. It includes various configuration options for industry classification, fundamental source, currency, conversion method, magnitude, display null value, field export format, reporting basis, function options, and dynamic field labels. At the bottom, there are buttons for 'SAVE SCREENER SETTINGS', 'CANCEL', and 'RESTORE DEFAULTS'.

| Setting | Value |
|-------------------------|--|
| Industry Classification | <input checked="" type="radio"/> S&P Capital IQ/GICS <input type="radio"/> S&P Market Intelligence |
| Fundamental Source | <input checked="" type="radio"/> S&P Global Universal <input type="radio"/> S&P Capital IQ <input type="radio"/> SNL Financial |
| Currency | U.S. Dollar (USD) |
| Conversion Method | MI recommended |
| Magnitude | Millions (6) |
| Display Null Value As | NA |
| Field Export Format | Export Field Alias |
| Reporting Basis | Current/Restated |
| Function Options | Included in export |
| Dynamic Field Labels | Excluded from export |

导入CIQ已保存的筛选条件

The screenshot shows a 'Screens' dialog box with a list of items to import. The 'Screens' item is selected with a checkmark. The dialog also includes 'Select All' and 'Clear All' buttons.

| Item | Selected |
|------------------|-------------------------------------|
| Alerts | <input type="checkbox"/> |
| Lists | <input type="checkbox"/> |
| Charts | <input type="checkbox"/> |
| Report Templates | <input type="checkbox"/> |
| Screens | <input checked="" type="checkbox"/> |

导入CIQ报告生成器已保存模板

The screenshot shows the 'IMPORT CAPITAL IQ REPORT BUILDER TEMPLATES' dialog. It includes a section for 'Import my Saved Report Templates from Capital IQ' with a table of templates to import.

| NAME | DETAILS |
|-------------|------------------------------|
| Test-0205-2 | Financials, Credit Analytics |
| Test-0205-1 | Financials, Credit Analytics |
| Te-0204-2 | Financials, Credit Analytics |
| Te-0204-1 | Financials, Credit Analytics |

- ▶ 用户可以在Screener中设置自己的偏好。
- ▶ 从Capital IQ导入报表生成器保存的模板和保存的筛选条件。
- ▶ 方便寻求工作流程连续性的CIQ长期用户。

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