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Task Menu

The Task Menu is located in the bottom left corner and offers a new and improved user experience that is workflow or step oriented. The goal of the Task Menu is to offer a more intuitive experience for users by making application functionality readily available via the Task Manager. Selecting any of the tasks within the menu opens a workflow with a step by step process that leads the user to quickly achieving desired results. A description of each item in the Task Menu is available by clicking on the arrow located to the left of the Task Menu item.

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Create a Study Area

A study area defines a boundary analyzed in a report. Study areas can be defined by rings (radii), donuts (bands), drive-time polygons, hand drawn shapes or standard geographic areas and can be created using the following methods:

Enter an Address

This method consists of 4 steps and allows the user to enter an address, intersection or phone number.

Step 1 of 4: Enter an address

The following are acceptable address formats:

430 N Michigan Ave, Chicago, IL

430 N Michigan Ave, 60611

N Michigan Ave & E North Water St, 60611

312-321-4461

Regardless of whether an address or phone number is entered in this step, the address will show up in the marker on the map.

Once the desired address is located successfully on the map, click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 4: Define study area type

In this step, the user is prompted to select the appropriate study area type. Each study area can be defined by rings (radii), donuts (bands) or drive-time polygons.

Rings are calculated as circles using your site as the center point. A site with 1, 3 and 5 mile rings will calculate statistics using the following three areas:

0 – 1 mile area

0 – 3 mile area

0 – 5 mile area

The maximum parameter for rings is 100 miles; the minimum parameter is .1 miles. Rings automatically default to 1, 3 and 5 miles; however, the user can modify default parameters via 'Edit Preferences' workflow.

Donuts are study areas that are cut out like donuts with no overlap. Donut rings offer the traditional ring study without duplication of overlapping areas. A site with 1, 3 and 5 mile donuts will calculate statistics using the following three areas:

0 – 1 mile area

1 – 3 mile area

3 – 5 mile area

The maximum parameter for donuts is 100 miles; the minimum parameter is .1 miles. Donuts automatically default to 1, 3 and 5 miles; however, the user can modify default parameters via 'Edit Preferences' workflow.

Drive-times are defined by the time it takes to drive from the outer border of the area to a site location. They are an effective tool for defining areas where access to a site is greatly affected by natural and man-made barriers, such as mountains, rivers, lakes, canyons, bridges and highways, in the total drive time under normal traffic conditions. A 5, 10 and 15 minute drive-time report describes data in 0 – 5 minute, 0 – 10 minute and 0 – 15 minute study areas.

The maximum parameter for drive-time polygons is 60 minutes; the minimum parameter is 2 minutes. Drive-times automatically default to 5, 10 and 15

minutes. Again, the user has the option to modify the default parameters if desired.

After the desired parameters are specified, click 'Apply' and the study area buffers will be drawn on the map.

When satisfied with the study area type and buffers, click the arrow to the right of the navigation box to proceed to Step 3.

Step 3 of 4: Name study area

In this step, the user is required to name the study area. The name given to the study area will appear in the marker on the map, once it is saved.

During this step, the following additional optional fields are available to users that want to further organize their study areas:

Property Type (Defaults to Unassigned) – Other options include the following:

Hospitality

Industrial

Land

Medical

Mixed-Use

Multifamily

Office

Other

Retail

Self-Storage

Senior Housing

Single Family

Unassigned

Study Area Description

Save to Folder

User has the ability to select which folder they want the study area saved. User-defined folders can be created via 'Open Data Manager'

workflow. Once they are created, they will appear in the drop-down list as an option when generating new study areas.

It is important to note that study area information can be edited quickly via the Data Manager.

After the desired information is entered, click 'Save'. Then click the arrow to the right of the navigation box to proceed to Step 4.

Step 4 of 4: Confirmation message

This step confirms the study area was created successfully and provides additional workflows the user may be interested in performing.

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Draw on Map

This method consists of three steps and allows the user to define a custom area by drawing a polygon on the map. A polygon is a closed shape defined by a connected sequence of x,y coordinate pairs, where the first and last coordinate pair is the same and all other pairs are unique.

Step 1 of 3: Choose tool

In this step, the user selects the Polygon Tool or Pen Tool and draws the desired polygon on the map.

Polygon Tool: User must click at least 3 points on the map to draw and double-click the last point to finish the polygon

Pen Tool: User must click and hold the left mouse button down on the map to draw and release the button to finish the polygon

The polygon will appear on the map as it is drawn using the tools. Users have the option to start over and re-draw the polygon until they are satisfied with their custom drawn area. If 'Start Over' is clicked, the tool must be selected again prior to redrawing on the map. Click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 3: Name study area

In this step, the user is required to name the study area. The name given to the study area will appear in the marker on the map, once it is saved.

During this step, the following additional optional fields are available to users that want to further organize their study areas:

Property Type (Defaults to Unassigned) – Other options include the following:

Hospitality

Industrial

Land

Medical

Mixed-Use

Multifamily

Office

Other

Retail

Self-Storage

Senior Housing

Single Family

Unassigned

Study Area Description

Save to Folder

User has the ability to select which folder they want the study area saved. User-defined folders can be created via 'Open Data Manager' workflow. Once they are created, they will appear in the drop-down list as an option when generating new study areas.

It is important to note that study area information can be edited quickly via the Data Manager.

After the desired information is entered, click 'Save'. Then click the arrow to the right of the navigation box to proceed to Step 3.

Step 3 of 3: Confirmation message

This step confirms the study area was created successfully and provides additional workflows the user may be interested in performing.

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Click on Map

This method consists of 4 steps and allows the user to select a location by simply clicking on the map. It may be helpful to first use the 'Find Widget' located in the upper left hand corner in order to zoom into the area of interest.

Step 1 of 4: Click on map to find your location

In this step, simply find a location by clicking on the map. The marker will be displayed on the map with the appropriate latitude and longitude. The user has the ability to reset or adjust the marker by clicking on the map again, which automatically updates the latitude and longitude within the marker. Once satisfied with the location, click 'Set Point'. It's important to note that once you've selected 'Set Point', the only way to adjust the point or change the location is to cancel the workflow and start the process over. Click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 4: Define study area type

In this step, the user is prompted to select the appropriate study area type. Each study area can be defined by rings (radii), donuts (bands) or drive-time polygons.

Rings are calculated as circles using your site as the center point. A site with 1, 3 and 5 mile rings will calculate statistics using the following three areas:

0 – 1 mile area

0 – 3 mile area

0 – 5 mile area

The maximum parameter for rings is 100 miles; the minimum parameter is .1 miles. Rings automatically default to 1, 3 and 5 miles; however, the user can modify default parameters via 'Edit Preferences' workflow.

Donuts are study areas that are cut out like donuts with no overlap. Donut rings offer the traditional ring study without duplication of overlapping areas. A site with 1, 3 and 5 mile donuts will calculate statistics using the following three areas:

0 – 1 mile area

1 – 3 mile area

3 – 5 mile area

The maximum parameter for donuts is 100 miles; the minimum parameter is .1 miles. Donuts automatically default to 1, 3 and 5 miles; however, the user can modify default parameters via 'Edit Preferences' workflow.

Drive-times are defined by the time it takes to drive from the outer border of the area to a site location. They are an effective tool for defining areas where access to a site is greatly affected by natural and man-made barriers, such as mountains, rivers, lakes, canyons, bridges and highways, in the total drive time under normal traffic conditions. A 5, 10 and 15 minute drive-time report describes data in 0 – 5 minute, 0 – 10 minute and 0 – 15 minute study areas.

The maximum parameter for drive-time polygons is 60 minutes; the minimum parameter is 2 minutes. Drive-times automatically default to 5, 10 and 15 minutes. Again, the user has the option to modify the default parameters if desired.

After the desired parameters are specified, click 'Apply' and the study area buffers will be drawn on the map.

When satisfied with the study area type and buffers, click the arrow to the right of the navigation box to proceed to Step 3.

Step 3 of 4: Name study area

In this step, the user is required to name the study area. The name given to the study area will appear in the marker on the map, once it is saved.

During this step, the following additional optional fields are available to users that want to further organize their study areas:

Property Type (Defaults to Unassigned) – Other options include the following:

Hospitality

Industrial

Land

Medical

Mixed-Use

Multifamily

Office

Other

Retail

Self-Storage

Senior Housing

Single Family

Unassigned

Study Area Description

Save to Folder

User has the ability to select which folder they want the study area saved. User-defined folders can be created via 'Open Data Manager' workflow. Once they are created, they will appear in the drop-down list as an option when generating new study areas.

It is important to note that study area information can be edited quickly via the Data Manager.

After the desired information is entered, click 'Save'. Then click the arrow to the right of the navigation box to proceed to Step 4.

Step 4 of 4: Confirmation message

This step confirms the study area was created successfully and provides additional workflows the user may be interested in performing.

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Upload a File

This method consists of six steps and allows the user to create multiple study areas by uploading a file in Excel (.xls) or CSV (.csv) format. Please note that the number of study areas uploaded from a file is limited to 50 locations. If using Microsoft Office 2007 Excel, users must save the file as an .xls format before uploading the file. At a minimum, the location file is required to include Name, Street, City, State and Zip. Latitude and Longitude fields are optional.

Step 1 of 6: Select an Excel (.xls) or CSV (.csv) file to upload

This step prompts the user to browse for the desired file to be used in the upload process. When the 'Browse' button is selected, the user is able to search and select the file. The name of the selected file will be displayed in the navigation box. The next step is to click 'Upload'. A progress bar is displayed as the file is uploading and a confirmation message will appear once the load process has been completed. Click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 6: Pick the appropriate columns from your file

As the file was uploaded, the application tried to match the following address columns:

Name

Street

City

State

Zip

Latitude

Longitude

This step identifies which address columns were automatically matched and gives the user the opportunity to manually match columns, based on information contained in the file. Click 'Set Columns' to finish the upload process, which includes parsing and geocoding. A progress bar is displayed as the file is parsed and geocoded and a confirmation message will appear once the process has been completed. Proceed to Step 3 by clicking the arrow to the right of the navigation box.

Step 3 of 6: Review uploaded results

This is a very important step in the process and allows the user to manage/edit their uploaded results. A table is displayed that shows matched records, records with multiple matches and records with no matches. It's important to note that study areas will only be created for 'Matched' records. In this step, users have the ability to correct addresses that were not matched or had multiple matches.

Matched: Records were geocoded and uploaded successfully. No further action is required by the user.

Multiple Matches: Records were geocoded and multiple matches were identified. For each record that contains multiple matches, the user has the ability to view the matches and select the desired address onscreen. Once the user selects the desired address, the record will automatically move to the "Matched" records tab. All records within this tab must be edited by the user or they will not be included in the upload process.

No Matches: Records were not geocoded successfully. For each record without a match, the user will have the ability to correct/edit the address. Records can be edited quickly by selecting the record and entering the correct address within the 'Find' tool that is provided onscreen. Once a match is determined, the record will automatically move to the "Matched" records tab. All records within this tab must be edited by the user or they will not be included in the upload process.

Once the user is satisfied with their results, click on the arrow to the right of the navigation box to proceed to Step 4. At this time, all matched study areas will be displayed on the map. The 'Name' specified in the file will appear in the marker on the map.

Step 4 of 6: Define study area type

In this step, the user is prompted to select the appropriate study area type. Each study area can be defined by rings (radii) or donuts (bands). Due to performance concerns, drive-times are not an option when uploading study areas.

Rings are calculated as circles using your site as the center point. A site with 1, 3 and 5 mile rings will calculate statistics using the following three areas:

0 – 1 mile area

0 – 3 mile area

0 – 5 mile area

The maximum parameter for rings is 100 miles; the minimum parameter is .1 miles. Rings automatically default to 1, 3 and 5 miles; however, the user can modify default parameters via 'Edit Preferences' workflow.

Donuts are study areas that are cut out like donuts with no overlap. Donut rings offer the traditional ring study without duplication of overlapping areas. A site with 1, 3 and 5 mile donuts will calculate statistics using the following three areas:

0 – 1 mile area

1 – 3 mile area

3 – 5 mile area

The maximum parameter for donuts is 100 miles; the minimum parameter is .1 miles. Donuts automatically default to 1, 3 and 5 miles; however, the user can modify default parameters via 'Edit Preferences' workflow.

After the desired parameters are specified, click 'Apply' and the study area buffers will be drawn on the map.

When satisfied with the study area type and buffers, click the arrow to the right of the navigation box to proceed to Step 5.

Step 5 of 6: Describe and organize study areas

In this step, the user has the option to further define and organize their study areas. It's important to note that information entered in this step applies to all study areas uploaded; however, individual study area information can be edited quickly via the "Data Manager". The following additional optional fields are available to users:

Study Area Description

User has the option to enter a description that will apply to all uploaded study areas.

Property Type (Defaults to Unassigned) – Other options include the following:

Hospitality

Industrial

Land

Medical

Mixed-Use

Multifamily

Office

Other

Retail

Self-Storage

Senior Housing

Single Family

Unassigned

Save to Folder

User has the ability to select which folder they want the study area saved. User-defined folders can be created via 'Open Data Manager' workflow. Once they are created, they will appear in the drop-down list as an option when generating new study areas.

After the desired information is entered, click 'Save'. Then, click the arrow to the right of the navigation box to proceed to Step 6.

Step 6 of 6: Confirmation message

This step confirms the study areas were created successfully and provides additional workflows the user may be interested in performing.

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Select Standard Geography

This method consists of three steps and allows the user to select their location based on standard geographies. A standard geography is an area surrounded by a defined border, such as a state, a county or a zip code. The following standard geographies are available in the application:

Block Group: A unit of U.S. census geography that is a combination of census blocks. A block group is the smallest unit for which the U.S. Census Bureau reports a full range of demographic statistics. There are about 700 residents per block group. A block group is a subdivision of a census tract.

Tracts: A small, statistical subdivision of a county that usually includes approximately 4,000 inhabitants but may include from 2,500 to 8,000 inhabitants. A census tract is designed to encompass a population with relatively uniform economic status, living conditions, and some demographic characteristics. Tract boundaries normally follow physical features but may also follow administrative boundaries or other nonphysical features. A census tract is a combination of census block groups.

Zip Code: Acronym for *zone improvement plan code*. A five-digit code, developed by the U.S. Postal Service, that identifies the geographic delivery area served by an individual post office or metropolitan area delivery station.

City & Town

County Subdivision: A statistical division of a county recognized by the U.S. Census Bureau for data presentation. County subdivisions can include census county divisions, census subareas, minor civil divisions, and unorganized territories.

County: The primary legal subdivision of all U.S. states except Alaska and Louisiana. The U.S. Census Bureau uses counties or equivalent entities (boroughs in Alaska, parishes in Louisiana, the District of Columbia in its entirety, and municipios in Puerto Rico) as statistical subdivisions.

Congressional District: A geographical and political division in which voters elect representatives to the U.S. House of Representatives. Each state establishes its congressional districts based on population counts, with the goal of having districts as equal in population as possible.

State: An autonomous political and administrative division of geography. The United States is composed of 50 states. The District of Columbia is included as a state-equivalent area.

Major Market (DMA): Acronym for *Designated Market Area*. A television market as defined by Nielsen Media Research. Most DMAs correspond to whole counties, but there are a few exceptions where counties are split into different DMAs.

Metropolitan Area (CBSA): A geographic region containing at least one urban area with a population of at least 10,000, defined by the U.S. Office of Management and Budget for use by federal statistical agencies, including the U.S. Census Bureau. A core-based statistical area can be a metropolitan statistical area or a micropolitan statistical area.

Step 1 of 3: Select Standard Geographies

This step allows the user to select standard geographies by any of the following methods:

Contained in the Current Map: This method provides available standard geographies (highlighted in red), based on the current extent of the map. Standard geographies that are not available will be grayed out.

By State: This method allows users to search for Cities or Towns, Counties and Congressional Districts filtered by State.

Anywhere in the Country: This method allows users to search for States, Major Markets (DMA) or Metropolitan Areas (CBSA).

Search All: This method allows users to perform a search of all standard geographies by entering a keyword. Users also have the option of filtering the search by any standard geography level listed above.

While the application is searching for geographies, the user will see a 'Searching' progress bar at the top right of the navigation box. When the search is completed, available results are displayed in the left side of the table under 'Search Results'. Results can be sorted in the table by clicking on ID, Name or Level and column widths can be adjusted by dragging the column border. To select a standard geography, simply highlight the item and double click or drag it to the right table called 'Selected Geographies'. The user has the option to select one or multiple standard geographies at a time. If an item is selected in error, the user can remove it from the table by highlighting it and clicking on 'Remove Selected'.

Once the desired standard geographies are selected, proceed to Step 2 by clicking the arrow to the right of the navigation box.

Step 2 of 3: Name study area

In this step, the user is required to name the study area. The name given to the study area will appear in the marker on the map, once it is saved.

During this step, the following additional optional fields are available to users that want to further organize their study areas:

Property Type (Defaults to Unassigned) – Other options include the following:

Hospitality

Industrial
Land
Medical
Mixed-Use
Multifamily
Office
Other
Retail
Self-Storage
Senior Housing
Single Family
Unassigned

Study Area Description

Save to Folder

User has the ability to select which folder they want the study area saved. User-defined folders can be created via 'Open Data Manager' workflow. Once they are created, they will appear in the drop-down list as an option when generating new study areas.

It is important to note that study area information can be edited quickly via the Data Manager.

After the desired information is entered, click 'Save'. Then click the arrow to the right of the navigation box to proceed to Step 3.

Step 3 of 3: Confirmation message

This step confirms the study area was created successfully and provides additional workflows the user may be interested in performing.

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Enter a Latitude/Longitude

This method consists of four steps and can be used when the exact latitude and longitude of a location is known.

Step 1 of 4: Enter Latitude and Longitude

In this step, the user is prompted to enter the latitude and longitude. Click 'Apply' and the location will appear on the map. The marker will include the specified latitude and longitude. The latitude and longitude can be changed as many times as necessary prior to advancing to the next step. When satisfied with the location, click on the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 4: Define study area type

In this step, the user is prompted to select the appropriate study area type. Each study area can be defined by rings (radii), donuts (bands) or drive-time polygons.

Rings are calculated as circles using your site as the center point. A site with 1, 3 and 5 mile rings will calculate statistics using the following three areas:

0 – 1 mile area

0 – 3 mile area

0 – 5 mile area

The maximum parameter for rings is 100 miles; the minimum parameter is .1 miles. Rings automatically default to 1, 3 and 5 miles; however, the user can modify default parameters via 'Edit Preferences' workflow.

Donuts are study areas that are cut out like donuts with no overlap. Donut rings offer the traditional ring study without duplication of overlapping areas. A site with 1, 3 and 5 mile donuts will calculate statistics using the following three areas:

0 – 1 mile area

1 – 3 mile area

3 – 5 mile area

The maximum parameter for donuts is 100 miles; the minimum parameter is .1 miles. Donuts automatically default to 1, 3 and 5 miles; however, the user can modify default parameters via 'Edit Preferences' workflow.

Drive-times are defined by the time it takes to drive from the outer border of the area to a site location. They are an effective tool for defining areas where access to a site is greatly affected by natural and man-made barriers, such as mountains, rivers, lakes, canyons, bridges and highways, in the total drive time under normal traffic conditions. A 5, 10 and 15 minute drive-time

report describes data in 0 – 5 minute, 0 – 10 minute and 0 – 15 minute study areas.

The maximum parameter for drive-time polygons is 60 minutes; the minimum parameter is 2 minutes. Drive-times automatically default to 5, 10 and 15 minutes. Again, the user has the option to modify the default parameters if desired.

After the desired parameters are specified, click 'Apply' and the study area buffers will be drawn on the map.

When satisfied with the study area type and buffers, click the arrow to the right of the navigation box to proceed to Step 3.

Step 3 of 4: Name study area

In this step, the user is required to name the study area. The name given to the study area will appear in the marker on the map, once it is saved.

During this step, the following additional optional fields are available to users that want to further organize their study areas:

Property Type (Defaults to Unassigned)

Hospitality

Industrial

Land

Medical

Mixed-Use

Multifamily

Office

Other

Retail

Self-Storage

Senior Housing

Single Family

Unassigned

Study Area Description

Save to Folder

User has the ability to select which folder they want the study area saved. User-defined folders can be created via 'Open Data Manager' workflow. Once they are created, they will appear in the drop-down list as an option when generating new study areas.

It is important to note that study area information can be edited quickly via the Data Manager.

After the desired information is entered, click the arrow to the right of the navigation box to proceed to Step 4.

Step 4 of 4: Confirmation message

This step confirms the study area was created successfully and provides additional workflows the user may be interested in performing.

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Run Reports

Step 1 of 5: Select your study area(s)

This step prompts the user to select the study area(s) of interest for report generation. At least one study area must be selected in order to submit a report order. Active study areas automatically appear in the table; however, the user has the ability to run reports for inactive study areas as well. To show all saved study areas, simply click on the arrow next to 'Active Studies' and select 'All Studies'. There are two methods for selecting study areas. The user can either double click on the desired study area, which automatically adds the study area to the table, or highlight the study area and drag it to the bottom table. Once the desired study areas are selected, click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 5: Select your reports

This step prompts the user to select the reports to be generated. The default table view lists all available reports, but users also have the ability to search reports by report groupings. This is done by clicking on the arrow next to 'All Reports' and selecting the desired report grouping. Examples of report groupings include STDB Top Picks, Charts and Graphs, Traffic and Demographic Reports. Report samples are available by clicking on 'Open' under Example in the table.

There are two methods for selecting reports. The user can either double click on the desired report, which automatically adds the report to the table, or highlight the report and drag it to the bottom table. It's important to note that not all reports are available for each study area type. Example: Community Comparison Report is only

available for rings, donuts and drive times and does not support polygon or standard geography study area types. In the report table, the supported study area types are identified for each report using icons under 'Supported Types'. The icon legend appears at the bottom of the table. If a user selects a report that is not supported for the study area selected in Step 1, the report will be highlighted in red when added to the table. The report must be removed from the table by highlighting it and clicking 'Remove Selected' in order to proceed to the next step.

Report formats that are currently available include PDF and Excel. The user has the ability to select the desired format for each report once it has been added to the bottom table.

When the desired reports are selected, click the arrow to the right of the navigation box to proceed to Step 3.

Step 3 of 5: Select an image from your library

This step prompts the user to select a logo to be used on reports generated in this order. Users can select an existing logo from their library or upload a new image (.png or .jpg format). The size dimension limit for report logos is 250 x 250 pixels. An error message will be displayed at the bottom of the screen in red if the limit is exceeded. To upload a logo, click on the 'Browse' button to locate the desired logo. The name of the selected file will be displayed in the navigation box. The next step is to click 'Upload'. A progress bar is displayed as the file is uploading and a confirmation will appear once the load process has been completed. Users can also delete unwanted logos by highlighting the image and clicking 'Delete'. Once the desired logo is selected, click the arrow to the right of the navigation box to proceed to Step 4.

Step 4 of 5: Submit report order

This step allows the user to specify a 'Report Subtitle' and gives the user the ability to add email addresses for other individuals that want to receive the report order. To submit the report order, click 'Run Order'. A report order confirmation will immediately appear at the bottom of the navigation box. Report orders will be emailed to users and reports will also be available via the Data Manager. Click the arrow to the right of the navigation box to proceed to Step 5.

Step 5 of 5: Confirmation message

This step confirms the report order was submitted successfully and provides additional workflows the user may be interested in performing.

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Run Comparison Reports

Step 1 of 5: Select your study area(s)

This step prompts the user to select the study area(s) of interest for comparison report generation. At least two study areas must be selected in order to submit a comparison report order. Active study areas automatically appear in the table; however, the user has the ability to run reports for inactive study areas as well. To show all saved study areas, simply click on the arrow next to 'Active Studies' and select 'All Studies'. There are two methods for selecting study areas. The user can either double click on the desired study area, which automatically adds the study area to the table, or highlight the study area and drag it to the bottom table. Once the desired study areas are selected, click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 5: Select your reports

This step prompts the user to select the reports to be generated. A sample of the report is available by clicking on 'Open' under Example in the table. Comparison reports are supported for all study area types and are available in Excel format only.

There are two methods for selecting reports. The user can either double click on the desired report, which automatically adds the report to the table, or highlight the report and drag it to the bottom table. When the desired reports are selected, click the arrow to the right of the navigation box to proceed to Step 3.

Step 3 of 5: Select an image from your library

This step prompts the user to select a logo to be used on reports generated in this order. Users can select an existing logo from their library or upload a new image (.png or .jpg format). The size dimension limit for report logos is 250 x 250 pixels. An error message will be displayed at the bottom of the screen in red if the limit is exceeded. To upload a logo, click on the 'Browse' button to locate the desired logo. The name of the selected file will be displayed in the navigation box. The next step is to click 'Upload'. A progress bar is displayed as the file is uploading and a confirmation will appear once the load process has been completed. Users can also delete unwanted logos by highlighting the image and clicking 'Delete'. Once the desired logo is selected, click the arrow to the right of the navigation box to proceed to Step 4.

Step 4 of 5: Submit report order

This step allows the user to specify a 'Report Subtitle' and gives the user the ability to add email addresses for other individuals that want to receive the report order. To submit the report order, click 'Run Order'. A report order confirmation will immediately appear at the bottom of the navigation box. Report orders will be emailed to users and reports will also be available via the Data Manager. Click the arrow to the right of the navigation box to proceed to Step 5.

Step 5 of 5: Confirmation message

This step confirms the report order was submitted successfully and provides additional workflows the user may be interested in performing.

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Create Business Lists

Run Business List Report (By Study Area)

This method consists of five steps and allows the user to generate a report containing business listings located within a particular study area.

Step 1 of 5: Select database

This step prompts the user to select the desired database to be used when generating the report. Currently, Experian is the only database available. Click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 5: Select your study area(s)

This step prompts the user to select the study area(s) of interest for report generation. At least one study area must be selected in order to submit a report order. Active study areas automatically appear in the table; however, the user has the ability to run reports for inactive study areas as well. To show all saved study areas, simply click on the arrow next to 'Active Studies' and select 'All Studies'. There are two methods for selecting study areas. The user can either double click on the desired study area, which automatically adds the study area to the table, or highlight the study area and drag it to the bottom table. Once the desired study areas are selected, click the arrow to the right of the navigation box to proceed to Step 3.

Step 3 of 5: Select business filter (All, By NAICS, By SIC, STDB Favorites)

This step prompts the user to select the desired business filter to be used when generating the report(s). The following four filters are available and described below:

All: All businesses within the selected study area(s) will be included in the report(s).

By NAICS: The **North American Industry Classification System (NAICS)** is used by business and government to classify and measure economic activity in Canada, Mexico and the United States. It was released in 1997 and has largely replaced the older Standard Industrial Classification (SIC) system; however, certain government departments and agencies, such as the U.S. Securities and Exchange Commission (SEC), still use the SIC codes. The NAICS numbering system is a six-digit code. The first five digits

are generally (although not always strictly) the same in all three countries. The last digit designates national industries. The first two digits designate the largest business sector, the third digit designates the subsector, the fourth digit designates the industry group, and the fifth digit designates particular industries. If this option is selected, the report will only include businesses that match the selected NAICS codes.

By SIC: The **Standard Industrial Classification (SIC)** is a United States government system for classifying industries by a four-digit code. Established in 1937, it is being supplemented by the six-digit North American Industry Classification System (NAICS). If this option is selected, the report will only include businesses that match the selected SIC codes.

STDB Favorites: STDB has pre-defined a list of popular search criteria, based on NAICS codes. If this option is selected, the report will only include businesses that match the NAICS codes contained within the pre-defined STDB Favorite filter.

Once the desired filter is selected, click the arrow to the right of the navigation box to proceed to Step 4.

Step 4 of 5: Submit report order

This step allows the user to specify a 'Report Subtitle' and gives the user the ability to add email addresses for other individuals that want to receive the report order. To submit the report order, click 'Run Order'. A report order confirmation will immediately appear at the bottom of the navigation box. Report orders will be emailed to users and reports will also be available via the Data Manager. Click the arrow to the right of the navigation box to proceed to Step 5.

Step 5 of 5: Confirmation message

This step confirms the report order was submitted successfully and provides additional workflows the user may be interested in performing.

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Export Filtered Business List (By Business Name, Business Address, Street Range or Standard Geography)

This method consists of five steps and allows the user to generate a filtered business list onscreen with the ability to export results to Excel. It's important to note that results are not limited to a study area, but rather all records available in the database. This method gives you the option to filter results by Business Name, Business Address, Street Range or Standard Geography (City, State and Zip).

Step 1 of 5: Select database

This step prompts the user to select the desired database to be used when generating the report. Currently, Experian is the only database available. Click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 5: Select business filter (All, By NAICS, By SIC, STDB Favorites)

This step prompts the user to select the desired business filter to be used when generating the report(s). The following four filters are available and described below:

All: All businesses within the selected study area(s) will be included in the report(s).

By NAICS: The **North American Industry Classification System (NAICS)** is used by business and government to classify and measure economic activity in Canada, Mexico and the United States. It was released in 1997 and has largely replaced the older Standard Industrial Classification (SIC) system; however, certain government departments and agencies, such as the U.S. Securities and Exchange Commission (SEC), still use the SIC codes. The NAICS numbering system is a six-digit code. The first five digits are generally (although not always strictly) the same in all three countries. The last digit designates national industries. The first two digits designate the largest business sector, the third digit designates the subsector, the fourth digit designates the industry group, and the fifth digit designates particular industries. If this option is selected, the report will only include businesses that match the selected NAICS codes.

By SIC: The **Standard Industrial Classification (SIC)** is a United States government system for classifying industries by a four-digit code. Established in 1937, it is being supplemented by the six-digit North American Industry Classification System (NAICS). If this option is selected, the report will only include businesses that match the selected SIC codes.

STDB Favorites: STDB has pre-defined a list of popular search criteria, based on NAICS codes. If this option is selected, the report will only include businesses that match the NAICS codes contained within the pre-defined STDB Favorite filter.

Once the desired filter is selected, click the arrow to the right of the navigation box to proceed to Step 3.

Step 3 of 5: Define business attributes (Optional)

This step is optional in the process and allows the user to further define businesses based on additional filter parameters. This filter works well if 'All' businesses was selected from Step 2 above. The following additional filters are available and described below:

Business Name: Enter a specific business name or partial name with an asterisk (*). Then specify a city, state or zip to further refine your search.

The asterisk acts as a wild card and searches for businesses that contain the partial name in the full business name. (Examples: Home Depot or Hom)*

When using the wild card search feature, the partial name must contain at least 3 characters.

Street Range: Enter the beginning and ending numeric values for the street range. Then specify a street, city, state or zip to further refine your search.

The street range is a very powerful filter and can be used in a variety of ways, which include the following examples:

EXAMPLE 1

Street Range	<input type="text" value="5000"/>	<input type="text" value="6000"/>
Street	<input type="text" value="Sherry"/>	
City	<input type="text" value="Dallas"/>	
State	<input type="text" value="TX"/>	

In Example 1 above, the request will search for all businesses located on Sherry (street, lane, drive, etc.) in Dallas, Texas, between street range numeric values 5000 and 6000.

EXAMPLE 2

Street Range	<input type="text" value="5000"/>	<input type="text"/>
Street	<input type="text" value="Sherry"/>	
City	<input type="text" value="Dallas"/>	
State	<input type="text" value="TX"/>	

In Example 2 above, the request will search for all businesses located on Sherry (street, lane, drive, etc.) in Dallas, Texas, with a street range equal to or greater than 5000.

EXAMPLE 3

Street Range	<input type="text"/>	<input type="text" value="5000"/>
Street	<input type="text" value="Sherry"/>	
City	<input type="text" value="Dallas"/>	
State	<input type="text" value="TX"/>	

In Example 3 above, the request will search for all businesses located on Sherry (street, lane, drive, etc.) in Dallas, Texas, with a street range equal to or less than 5000.

EXAMPLE 4

Street Range	<input type="text" value="5950"/>	<input type="text" value="5950"/>
Street	<input type="text" value="Sherry"/>	
City	<input type="text" value="Dallas"/>	
State	<input type="text" value="TX"/>	

In Example 4 above, the request will search for all businesses located at 5950 Sherry (street, lane, drive, etc.) in Dallas, Texas.

Street: Enter a specific street name or partial name with an asterisk (*). Then specify a city, state or zip to further refine your search.

The asterisk acts as a wild card and searches for streets that contain the partial name in the full street name. (Examples: Sherry or She)*

When using the wild card search feature, the partial name must contain at least 3 characters.

City: Enter a specific city name. Then specify a state or zip to further refine your search.

The wild card search feature does not work for this field.

State: Enter the specific two-digit value for state.

(Examples: CA, AZ, TX)

Zip: Enter the specific five-digit value for zip code.

(Example: 92373)

Once the desired filters are selected, click the arrow to the right of the navigation box to proceed to Step 4.

Step 4 of 5: View and export results

This step displays search results in an on-screen table, based on the filter parameters selected in Steps 2 & 3 above. The maximum number of search results returned is 2,000 records, but may be even less, based on pre-defined STDB membership levels. Users have the ability to peruse results in the table to determine if they are satisfied with the records. If not, users can easily rerun the search query by hitting the back arrow and redefining the parameters in Step 3. Once the user is satisfied with their query results, results can be exported to excel by selecting the 'Export to Excel' button at the bottom right corner of the navigation box. This process can be repeated as many times as desired.

It's important to note that query results generated in this workflow are not saved in the Data Manager.

Once the user is finished querying businesses, click the arrow to the right of the navigation box to proceed to Step 5.

Step 5 of 5: Confirmation message

This step confirms the search query was generated successfully and provides additional workflows the user may be interested in performing.

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Upload User Points

This feature consists of six steps and allows the user to upload user points, save them as a group and display them as a custom map layer. User points can be uploaded from either Excel (.xls) or CSV (.csv) format. If using Microsoft Office 2007 Excel, users must save the file as an .xls format before uploading the file. Please note that the number of user points uploaded from a file is limited to 100 locations. At a minimum, the location file is required to include Name, Street, City, State and Zip. Latitude and Longitude fields are optional.

Step 1 of 6: Select an Excel (.xls) or CSV (.csv) file to upload

This step prompts the user to browse for the desired file to be used in the upload process. When the 'Browse' button is selected, the user is able to search and select the file. The name of the selected file will be displayed in the navigation box. The next step is to click 'Upload'. A progress bar is displayed as the file is uploading and a confirmation message will appear once the load process has been completed. Click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 6: Pick the appropriate columns from your file

As the file was uploaded, the application tried to match the following address columns:

Name

Street

City

State

Zip

Latitude

Longitude

This step identifies which address columns were automatically matched and gives the user the opportunity to manually match columns, based on information contained in the file. At a minimum, the location file is required to include Name, Street, City, State and Zip. Latitude and Longitude fields are optional, as well as ten (10) additional 'Attribute Columns' that are located in the bottom section of the table. These optional attribute columns give users the ability to save additional information for each user point location. For example, the file may contain the type of property, square footage, price or any other attributes of interest. To include custom attributes, simply click on the drop-down located next to each field and select the desired attribute. To finish the upload process, click 'Set Columns' and the records will be parsed and geocoded. A progress bar is displayed as the file is parsed and geocoded and a confirmation message will appear once the process has been completed. Proceed to Step 3 by clicking the arrow to the right of the navigation box.

Step 3 of 6: Review uploaded results

This is a very important step in the process and allows the user to manage/edit their uploaded results. A table is displayed that shows matched records, records with multiple matches and records with no matches. It's important to note that user points will only be created for 'Matched' records. In this step, users have the ability to correct addresses that were not matched or had multiple matches.

Matched: Records were geocoded and uploaded successfully. No further action is required by the user.

Multiple Matches: Records were geocoded and multiple matches were identified. For each record that contains multiple matches, the user has the ability to view the matches and select the desired address onscreen. Once the user selects the desired address, the record will automatically move to the "Matched" records tab. All records within this tab must be edited by the user or they will not be included in the upload process.

No Matches: Records were not geocoded successfully. For each record without a match, the user will have the ability to correct/edit the address. Records can be edited quickly by selecting the record and entering the correct address within the 'Find' tool that is provided onscreen. Once a match is determined, the record will automatically move to the "Matched" records tab.

All records within this tab must be edited by the user or they will not be included in the upload process.

Once the user is satisfied with their results, click on the arrow to the right of the navigation box to proceed to Step 4.

Step 4 of 6: Select an image from your library

This step prompts the user to select an image from their library that will be used as the icon displayed on the map to represent each user point within the user point group when the map layer is activated. Users can select an existing image from their library or upload a new image (.png or .jpg format). The size dimension limit for images is 30 x 30 pixels. An error message will be displayed at the bottom of the screen in red if the limit is exceeded. To upload an image, click on the 'Browse' button to locate the desired image. The name of the selected file will be displayed in the navigation box. The next step is to click 'Upload'. A progress bar is displayed as the file is uploading and a confirmation will appear once the upload process has been completed. Users can also delete unwanted images by highlighting the image and clicking 'Delete'. Once the desired image is selected, click the arrow to the right of the navigation box to proceed to Step 5.

Step 5 of 6: Describe and save user point group

In this step, users are required to enter a name for the user point group prior to saving the group. 'Description' is an optional field available to further define and organize user point groups. It's important to note that information entered in this step applies to all addresses contained in the user point group. Users also have the ability to select which folder they want the user point group saved. User-defined folders can be created via 'Open Data Manager' workflow. Once they are created, they will appear in the drop-down list as an option when saving new user point groups.

After the desired information is entered, click 'Save'. User points will appear on the map if you are zoomed in to the area of interest. Click the arrow to the right of the navigation box to proceed to Step 6.

Step 6 of 6: Confirmation message

This step confirms the user point group was created successfully and provides additional workflows the user may be interested in performing. To display the newly created user point group, click on 'Map Layers' in the upper right corner of the application and select the 'User' tab. The user point group will be listed and the checkbox to the left of it will be checked, which indicates the user point group is active. Depending on the extent of your map, the user point addresses may or may not be displayed. To display them, simply click on the '+' next to the user point group layer and the map will zoom to the area in which the user point addresses are located.

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Create Presentation Markers and Annotations

This feature consists of four steps and allows the user to add presentation markers or annotations to the map, save the presentation markers and/or annotations for future use or reference and display the presentation markers and/or annotations as a custom map layer. Presentation markers and annotations can be edited by the user at a later date if necessary.

PLEASE NOTE: Before proceeding, it is important to adjust your map to the specific area (map extent) you plan to add presentation markers or annotations. Do this using the Find tool, by creating a new study area, or opening a previously saved study area from the Data Manager. Presentation markers and annotations will remain the "**same size**" and in the "**same position**" if you adjust your map (zoom or pan). It is **imperative** that you select the map area you want to use **before** starting. Changing map types will not impact your map area.

At this time, there are some user limitations for the number of items that can be created within one saved annotation:

Predefined Shapes (including text) – 20

Images – 8

Polygons and Polylines – 5

Arrows – 8

Total # of Saved Annotations permitted - 10

Step 1 of 4: Zoom into the interested area

The user **MUST** zoom into the area of interest before using the Map Annotations. Once placed on the map, the presentation markers and annotation will remain the "same size" and in the "same position" if you adjust your map (zoom or pan). Click 'Create Map Presentations' in the Task Menu in the bottom left to proceed to Step 2.

Step 2 of 4: Choose Create Map Presentations on the Task Menu

Step 3 of 4: Click Create Annotation Set

Review the instructions and proceed to the next step. Choose the type of presentation marker or annotation(s) you would like to add to the map.

Shape

1. Click the drop-down arrow to select the shape




2. Click the shape you want to use and click the 'Add' predefined shape button




3. Click on the map in the desired location for the shape and the shape will appear on the map

4. To change the appearance of the shape, left click on the shape to view the edit options
5. Repeat the process to continue adding shapes to the map

Image

1. Click the 'Add image' button 
2. Click on the map in the desired location for the image
3. A box will appear that says 'Click to Edit'... left click in the box and click 'Edit Image'
4. Browse your computer for the image you would like to place on the map
5. Repeat the process to continue adding images to the map

Text

1. Click the 'Add text' button 
2. Click on the map in the desired location for the text
3. Text will appear that says 'Click to Edit'... left click on the text and click 'Edit text'
4. An 'Edit Text Box' will appear
 - a. Enter the text you would like and when finished, click on the map (you will notice the text changing as you type)
 - b. You also have the option to change the font style, size, location and color in this step
5. Repeat the process to continue adding text to the map

Draw

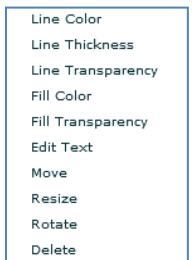
1. Choose the drawing tool you would like to use



- a. Draw a Polyline (Shape) - A Polyline is a series of connected straight lines. Please note that you must double click when ending the Polyline.
 - b. Draw a Freehand Polyline (Pen) - Please note that you release the left mouse button when complete.
 - c. Draw an Arrow (Shape) - Please note that you release the left mouse button when complete.
 - d. Draw a Polygon (Shape) Please note that you must double click when ending the Polyline.
 - e. Draw a Freehand Polygon (Shape) - Please note that you release the left mouse button when complete.
2. Click on the map to begin drawing (once you click on the map, simply move your mouse to start drawing and finish by following the instructions for each tool noted above)
 3. Repeat the process to continue adding shapes to the map

Object Properties (Shapes, Images, Text, and Draw)


1. Click on any presentation marker or annotations to edit the object.
2. Move the left mouse until you have highlighted the appropriate command.
3. After completing any command, click anywhere on the map to close the dialogue box



Delete Object(s)

1. Click on any presentation marker or annotations to delete the object.
2. Move the left mouse until you have highlighted the delete command.
3. Left click the delete command.

At anytime, if you are not pleased with the presentation markers and annotations

you made, simply click 'Clear All'  and all presentation markers and annotations active will be removed.

Once you are finishing making/creating annotations on the map, click the white arrow to the right to proceed to the final step of the process.

Step 4 of 4: Save Annotations

This is a very important step in the process and allows the user to access/manage/edit their presentation marker and annotations at a later date, if necessary. Name the presentation marker and annotation set and enter a description (optional) and click 'Save'.

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Editing a Previously Saved Annotation Set

1. Adjust your map to the general map extent that contains the Annotation Set you wish to edit
2. Choose Create Map Presentations from the Task menu
3. Click Edit Existing Annotation Set
4. Select the name of the Annotation Set that you wish to edit
5. Move to the next step
6. Click on any presentation marker or annotation and edit, as desired
7. When complete, click the right arrow and save the Annotation Set (you may use the same name which is pre-populated or use a different name)

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Opening or Deleting Previously Saved Annotation Sets using the Data Manager

1. Open the Data Manager
2. Click the Annotation folder in the Library (upper left hand corner).
3. To delete, highlight the name of the Annotation Set and click the Trash icon.

4. To activate an annotation set, after selecting the Annotation Set, either double click the item or drag the item to the Active Annotation Group in the lower right hand corner of the Data Manager.
5. To deactivate an active Annotation Set, highlight the name of the Annotation Set in Active Annotation Group and click the trash can immediately above.
6. When done, exit the Data Manager.

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Controlling Active Annotation Sets using the Map Layer Controls

1. Click the Map Layer tab (upper right hand corner of the screen)
2. Click the "Anno" tab
3. Select or deselect any active Annotation Set
4. Click + to zoom to the map extent that contains that particular Annotation Set.

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Create Data Lists – *Coming Soon*

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Create CCIMREDEX Lists – *Coming Soon*

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Run Map Reports

Custom Thematic Map Reports

Step 1 of 5: Select your study area(s)

This step prompts the user to select the study area(s) of interest for custom thematic map report generation. At least one study area must be selected in order to submit a report order. Active study areas automatically appear in the table; however, the user has the ability to run reports for inactive study areas as well. To show all saved study areas, simply click on the arrow next to 'Active Studies' and

select 'All Studies'. There are two methods for selecting study areas. The user can either double click on the desired study area, which automatically adds the study area to the table, or highlight the study area and drag it to the bottom table. Once the desired study areas are selected, click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 5: Define your thematic parameters

This step prompts the user to set parameters for the thematic map. Required parameters include selecting a database and then a variable contained in the database. When the desired database is selected, the variable dropdown list is automatically populated. Optional parameters include geography level, breaks, method and colors.

When thematic parameters are selected, click the arrow to the right of the navigation box to proceed to Step 3.

Step 3 of 5: Select an image from your library

This step prompts the user to select a logo to be used on thematic map reports generated in this order. Users can select an existing logo from their library or upload a new image (.png or .jpg format). The size dimension limit for report logos is 250 x 250 pixels. An error message will be displayed at the bottom of the screen in red if the limit is exceeded. To upload a logo, click on the 'Browse' button to locate the desired logo. The name of the selected file will be displayed in the navigation box. The next step is to click 'Upload'. A progress bar is displayed as the file is uploading and a confirmation will appear once the load process has been completed. Users can also delete unwanted logos by highlighting the image and clicking 'Delete'. Once the desired logo is selected, click the arrow to the right of the navigation box to proceed to Step 4.

Step 4 of 5: Submit report order

This step allows the user to specify a 'Report Subtitle' and gives the user the ability to add email addresses for other individuals that want to receive the report order. To submit the report order, click 'Run Order'. A report order confirmation will immediately appear at the bottom of the navigation box. Report orders will be emailed to users and reports will also be available via the Data Manager. Click the arrow to the right of the navigation box to proceed to Step 5.

Step 5 of 5: Confirmation message

This step confirms the report order was submitted successfully and provides additional workflows the user may be interested in performing.

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Open Data Manager

The Data Manager allows users to manage their study areas, reports and user point groups. Data can be organized in a hierarchical structure of folders, activated, deleted, copied, edited and downloaded. To exit the Data Manager and return to the map, click on the 'Exit Manager' icon located in the top right corner.

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Data Manager Library

The Data Manager Library is located in the upper right corner of the Data Manager and contains all saved study areas, saved user point groups, annotations and reports generated in all report orders. To view saved data, click on the desired folder within the library (Study Areas, User Points, Reports or Annotations).

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Create User Defined Folders

Users have the ability to create their own hierarchical structure of folders. Follow the steps below to create folders:

6. Click on 'Folders', which is located in the lower left table within the Data Manager
7. Click on the folder icon  and a text box will appear
8. Enter the 'Name' for the folder, which is required, and enter an optional 'Description' if desired
9. Click 'Add Folder'
10. The new folder will appear under the folder that was highlighted in Step 1 and it will contain 2 folders, one for Study Areas and one for User Points
11. Repeat the process to continue creating a hierarchical structure of folders

Add data to the folder hierarchy by dragging study areas or user point groups from the Data Manager Library. Study areas will automatically drop into the 'Study Area' folder and user point groups will automatically drop into the 'User Points' folder. Reports cannot be dragged and dropped from the Data Manager Library and stored in the hierarchical structure of folders.


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Manage Study Areas

Activate Study Areas

Study areas can be activated within the Data Manager Library by highlighting the desired study area(s) and dragging them into the 'Activate Study Areas' table.

Delete Study Areas

Study areas can be deleted from the Data Manager Library by highlighting the desired study area(s) and clicking on the trash can icon. 

Move Study Areas to User Defined Folders

Study areas can be organized and maintained in user-defined folders. To move study area(s) to a user-defined folder, highlight the study area(s) and drag them to the desired folder within the folder tree that is located in the lower left corner of the Data Manager Library.

Edit Study Area Name, Description, Category or Buffer

Study area name, description and category can be edited by highlighting the desired study area and clicking on the field to edit. Rings, donuts and drive-time buffers can be edited by highlighting the desired study area and clicking on the 'Edit' button located at the far left of the record.

Copy Study Area

Copy a study area by highlighting the desired study area and clicking on the 'Copy' button located at the far left of the record.


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Manage User Points

Activate User Points

User points can be activated within the Data Manager Library by highlighting the desired user points and dragging them into the 'Activate User Points' table.

Delete User Points

User points can be deleted from the Data Manager Library by highlighting the desired user points and clicking on the trash can icon. 

Move User Points to User Defined Folders

User points can be organized and maintained in user-defined folders. To move user points to a user-defined folder, highlight the user points and drag them to the desired folder within the folder tree that is located in the lower left corner of the Data Manager Library.

Edit User Points Image, Name or Description

User point's image, name and description can be edited by highlighting the desired user points and clicking on the field to edit.

Download User Points


User points can be downloaded to a CSV file by highlighting the desired user points and clicking on the 'Download' button located at the far left of the record.

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Manage Reports

To access reports generated in report orders, simply click on the 'Reports' folder within the Data Manager Library, which is located in the upper right corner of the Data Manager. All reports will be stored in the Data Manager for 60 days. After 60 days, the reports will automatically be deleted from the 'Reports' folder. If users wish to maintain reports longer than 60 days, reports should be saved to an external location outside of the application. User can delete reports or access them in a variety of methods as documented below.


Delete Report Orders

Reports can be deleted from the Data Manager Library by highlighting the desired report and clicking on the trash can icon. 


Open Reports

To view reports stored in the Data Manager Library, click on the 'Reports' folder and highlight the desired report. Click on 'Open' and the selected report will be displayed onscreen. Only one report can be opened at a time.

Get Selected Reports as ZIP File

To get reports stored in the Data Manager Library as a ZIP file, click on the 'Report' folder and highlight the desired reports. Click on the zip icon  and the selected reports will be displayed onscreen in a zip file.

Get Selected Reports as PDF File

To get reports stored in the Data Manager Library as a PDF file, click on the 'Report' folder and highlight the desired reports. Click on the PDF icon  and the selected reports will be displayed onscreen in a PDF file.


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Manage Annotations

Activate Annotations

Annotations can be activated within the Data Manager Library by highlighting the desired annotation(s) and dragging them into the 'Activate Annotations' table.

Delete Annotations

Annotations can be deleted from the Data Manager Library by highlighting the desired annotation(s) and clicking on the trash can icon. 

Move Annotations to User Defined Folders

Annotations can be organized and maintained in user-defined folders. To move annotation(s) to a user-defined folder, highlight the annotation(s) and drag them to the desired folder within the folder tree that is located in the lower left corner of the Data Manager Library.

Edit Annotation Name, Description

Annotation name and description can be edited by highlighting the desired study area and clicking on the field to edit.

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Edit Preferences

Users have the ability to customize the application by setting default preferences related to report logo, report format, study area type, report subtitle and thematic map color palette. Preferences help improve the speed at which users can navigate the application, gaining the desired information in the least amount of time.

Manage Report Logos

Users have the ability to maintain their own personal library of logos to be used on reports when generating report orders. A default report logo is selected as a user preference, but whenever a report order is generated, the user will have the opportunity to select any logo from their library. The maximum size limit for logos is 250 x 250 pixels.

Step 1 of 3: Select an image from your library

This step allows users to select a default logo to be used on reports that are generated. Users can select an existing logo from their library as their default or upload a new image (.png or .jpg format). The size dimension limit for report logos is 250 x 250 pixels. An error message will be displayed at the bottom of the screen in red if the limit is exceeded. To upload a logo, click on the 'Browse' button to locate the desired logo. The name of the selected file will be displayed in the navigation box. The next step is to click 'Upload'. A progress bar is displayed as the file is uploading and a confirmation will appear once the load process has been completed. Users can also delete unwanted logos by highlighting the image and

clicking 'Delete'. Once the desired default logo is selected, click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 3: Verify default report logo

This step prompts the user to verify the selected logo from Step 1. If the desired default logo appears, click 'Save Logo Preference', then click the arrow to the right of the navigation box to proceed to Step 3.

Step 3 of 3: Confirmation message

This step confirms the default logo has been saved successfully as a user preference and provides additional workflows the user may be interested in performing.

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Report Format

Users have the ability to select their desired default report format (Excel or PDF) as a user preference. Maps are only available in PDF format. Whenever a report order is generated, the user will have the opportunity to override their default format within any workflow that generates a report order.

Step 1 of 2: Select default report format

This step allows users to select their desired default report format. The two formats currently available are Excel or PDF. Once the desired format is selected, click 'Apply'. Click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 2: Confirmation message

This step confirms the default report format has been saved successfully as a user preference and provides additional workflows the user may be interested in performing.

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Study Area Type

Users have the ability to select their desired study area type (Rings or Donuts) as a user preference. Whenever a study area is created, the user will have the opportunity to override their default within any workflow that generates a study area.

Step 1 of 2: Select default study area type

This step allows users to select their desired default study area type. The two types currently available as user preferences are Rings and Donuts; Drive-times are also supported as an option within any workflow that generates a study area. Once the default study area type is selected and buffer parameters are set, click 'Apply'. Click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 2: Confirmation message

This step confirms the default study area type has been saved successfully as a user preference and provides additional workflows the user may be interested in performing.

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Report Subtitle

Users have the ability to customize the report subtitle that appears on generated reports. The system default is 'Prepared by STDBonline' and users are encouraged to save their own subtitle as a user preference. Whenever a report order is generated, the user will have the opportunity to override their default within any workflow that generates a report order.

Step 1 of 2: Enter report subtitle

This step allows users to enter their desired default subtitle to be included on reports generated by the system. Once the default report subtitle is entered, click 'Apply'. Click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 2: Confirmation message

This step confirms the default report subtitle was saved successfully as a user preference and provides additional workflows the user may be interested in performing.

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Thematic Map Colors

Users have the ability to select their desired color palette as a user preference, which will be used for thematic maps. Whenever a thematic map is created, the user will have the opportunity to override their default within any workflow that generates a thematic map.

Step 1 of 2: Select default thematic palette

This step allows users to select their desired default thematic map color palette as a user preference. Click on the drop down arrow to view several color palette options. Once the desired default palette is selected, click 'Apply'. Click the arrow to the right of the navigation box to proceed to Step 2.

Step 2 of 2: Confirmation message

This step confirms the default thematic palette has been saved successfully as a user preference and provides additional workflows the user may be interested in performing.

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Map Tools

Find Tool

The 'Find Tool' is located in the upper left corner of the application and enables users to quickly navigate to a location on the map, by inputting a street address, city or zip code. If multiple matches are found, they will appear in a text box and the user will be prompted to select the correct match. This tool is used to navigate around the map and is not used to create a study area.

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Map Capture

The 'Map Capture' tool is located in the upper right corner of the application and enables users to capture a screen shot of the current map displayed on-screen. The screen shot will be captured as a JPG file. To capture a map, simply click on the 'Map Capture' button and a preview of the map capture will be displayed on the screen. If the map has been captured as desired, click 'Capture' and a File Download window is displayed that prompts the user to open, save or cancel the file.

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Clear Map

The 'Clear Map' feature is located in the upper right corner of the application and allows users to quickly clear the map. This is helpful if study areas, user points or business layers are displayed on-screen and the user desires a clean map.

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Previous Map

The 'Previous Map' feature is located in the upper right corner of the application and allows users to go back to the map that was previously displayed.

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Map Types

The 'Map Types' tool is located in the upper right corner of the application and is defaulted to streets. To change the map type displayed, simply click on 'Map Types' and select from any of the following types:

Streets: A street map shows roads and streets in a district or entire city.

Satellite: A satellite map shows high-resolution imagery.

Hybrid: A hybrid map shows both streets and satellite imagery.

Topographic: A topographic map represents the vertical and horizontal positions of features, showing relief in some measurable form.

Shaded Relief: A shaded relief map shows changes in elevation using light and shadows on terrain from a given angle and altitude of the sun.

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Map Layers

Map layers add significant value to maps by enhancing what you see and giving you a more complete understanding of your area of interest. Map layers are divided into three types, which include base layers, study area layers and user point layers. The following map layers are available in the application by clicking on 'Map Layers':

Base Layers: To activate any of the base layers listed below, click on the 'Base' tab, peruse the layers and click on the checkbox to the left of the desired layers. If a map layer appears in the list, but is grayed out, simply zoom in to a closer map extent and the layer will appear. When layers are activated the icon displayed next to the layer will appear on the map. If you hover over the icon, the name will appear. Labels can also be turned on by clicking on the 'A' located to the right of the layer name in the menu.

Business Layers: Apparel – Children, Apparel – Family, Apparel – Men, Apparel – Women, Banks, Department Stores, Educational Services, Food Stores, HealthCare, Hospitality, Manufacturing, Pharmacies, Restaurants, Restaurants – Fast Food, Sporting Goods Stores

CCIM Layers: CCIM Candidate, CCIM Designee

STDB Retail Layers: STDB Retail Locations

Traffic Counts: Daily Traffic Volume

Borders: Census Block Groups, Census Tracts, Cities & Towns, Congressional Districts, Counties, County Subdivisions, Metropolitan Areas (CBSAs), Metropolitan Areas (DMAs), States, Zip Codes

Study Area Layers: To activate study areas, users must open the Data Manager, activate the desired study areas and exit the manager, which takes

you back to the map. Activated study areas are displayed under the 'Studies' tab when the user returns to the map. Detailed instructions for activating a study area using the Data Manager can be found in the section called 'Open Data Manager', 'Activate Study Areas'. Also, a newly saved study area will automatically appear as an activated study area layer.

User Point Layers: To activate user points, users must open the Data Manager, activate the desired user point group and exit the manager, which takes you back to the map. Activated user point groups are displayed under the 'User' tab when the user returns to the map. Detailed instructions for activating a user point group using the Data Manager can be found in the section called 'Open Data Manager', 'Activate User Points'. Also, a newly saved user point group will automatically appear as an activated user point layer.

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Thematic Map Tool

The 'Thematic Map' tool allows users to create an on-screen thematic map. This feature is located in the upper right corner and can be initiated by clicking on 'Thematics'. At a minimum, the user is required to select a database and then a variable contained in the database. When the desired database is selected, the variable dropdown list is automatically populated.

Optional advanced parameters are available and include the ability to control the number of breaks, number of ranges, transparency, geographic level and method. Colors can also be customized for all ranges or by individual breaks within a range. To change the color for an individual break, go to the map legend located at the bottom of the screen and click on the desired break to expose a color palette. Simply click on the desired color to customize it and the map will be updated automatically. This feature allows users to create maps that quickly highlight areas of interest.

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Overview Map

The 'Overview Map' tool is located in the lower left corner and can be displayed by clicking on the arrow. This tool provides the ability to view two (2) different map types onscreen at one time. For example, if the base map displays streets, the user could activate the Overview Map and display an aerial map. The Overview Map is captured in the screen shot when the 'Map Capture' tool is used.

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Known Issues

- **Black screen when zooming in to a location:** If you receive a black screen while zooming in to a location, it's because the level of streets or imagery is not available at that level. There is a fix in the works that will present a message to the user indicating "No Data is Available" when this is the case.

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